

# Global Trends in Packaged Food

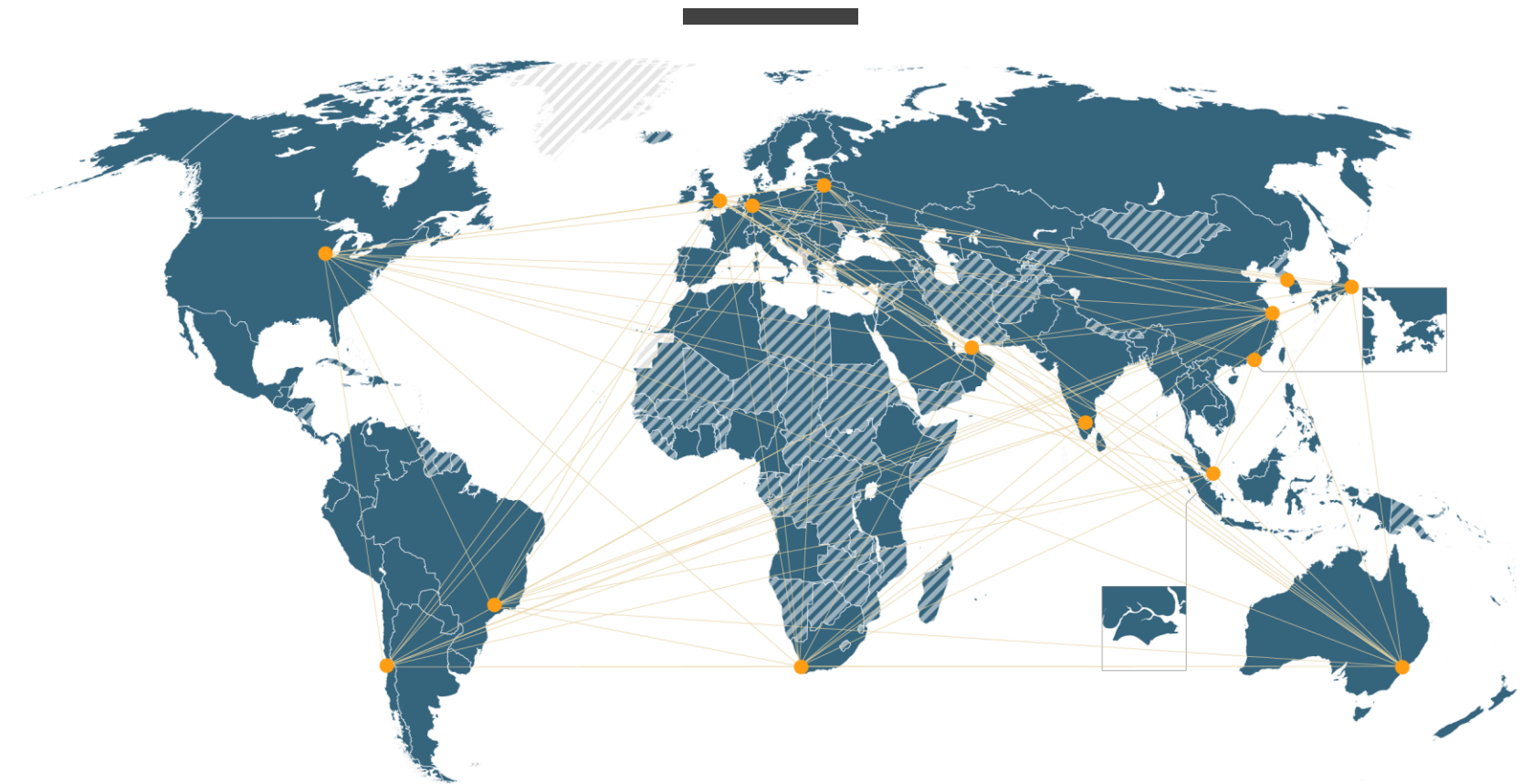
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Applications for grain-based products

Denis Afonin, Analyst



# Euromonitor International network and coverage



## ● 15 OFFICE LOCATIONS

London, Chicago, Singapore, Shanghai, Vilnius, Santiago, Dubai, Cape Town, Tokyo, Sydney, Bangalore, São Paulo, Hong Kong, Seoul and Düsseldorf

## ■ 100 COUNTRIES

in-depth analysis on consumer goods and service industries

## ■ + ▨ 210 COUNTRIES AND TERRITORIES

demographic, macro- and socio-economic data on consumers and economies

# OVERVIEW

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## **What are grain-based products?**

Global Trends in Packaged Food

Combining the two

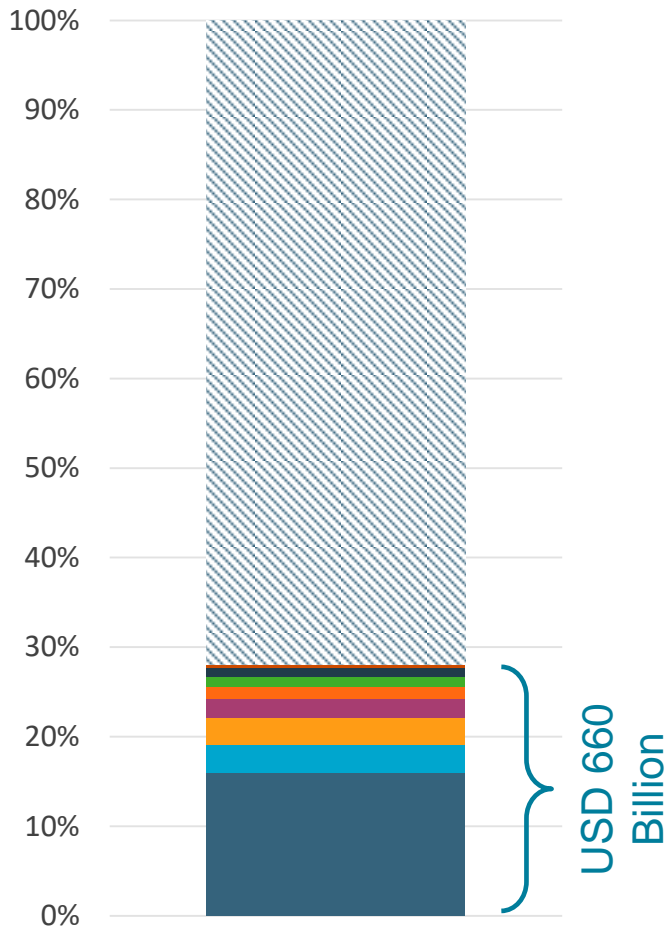
Identifying Key Markets

Key Findings

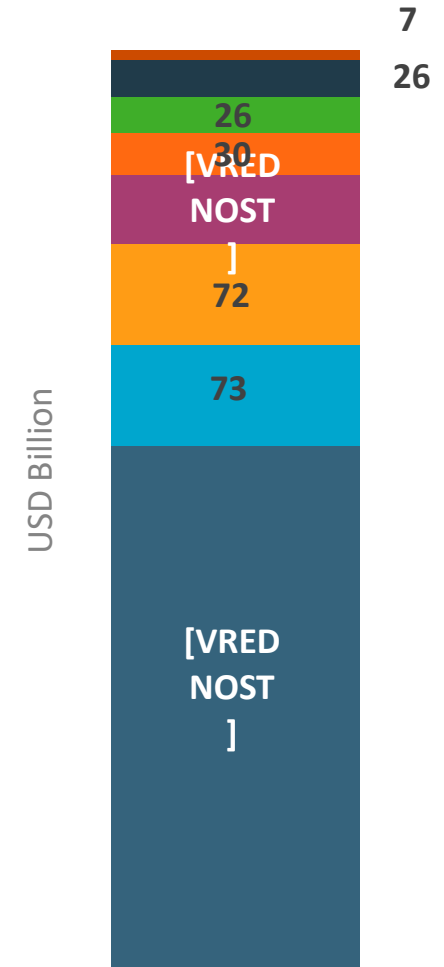


# Global Sales of Grain-Based Products

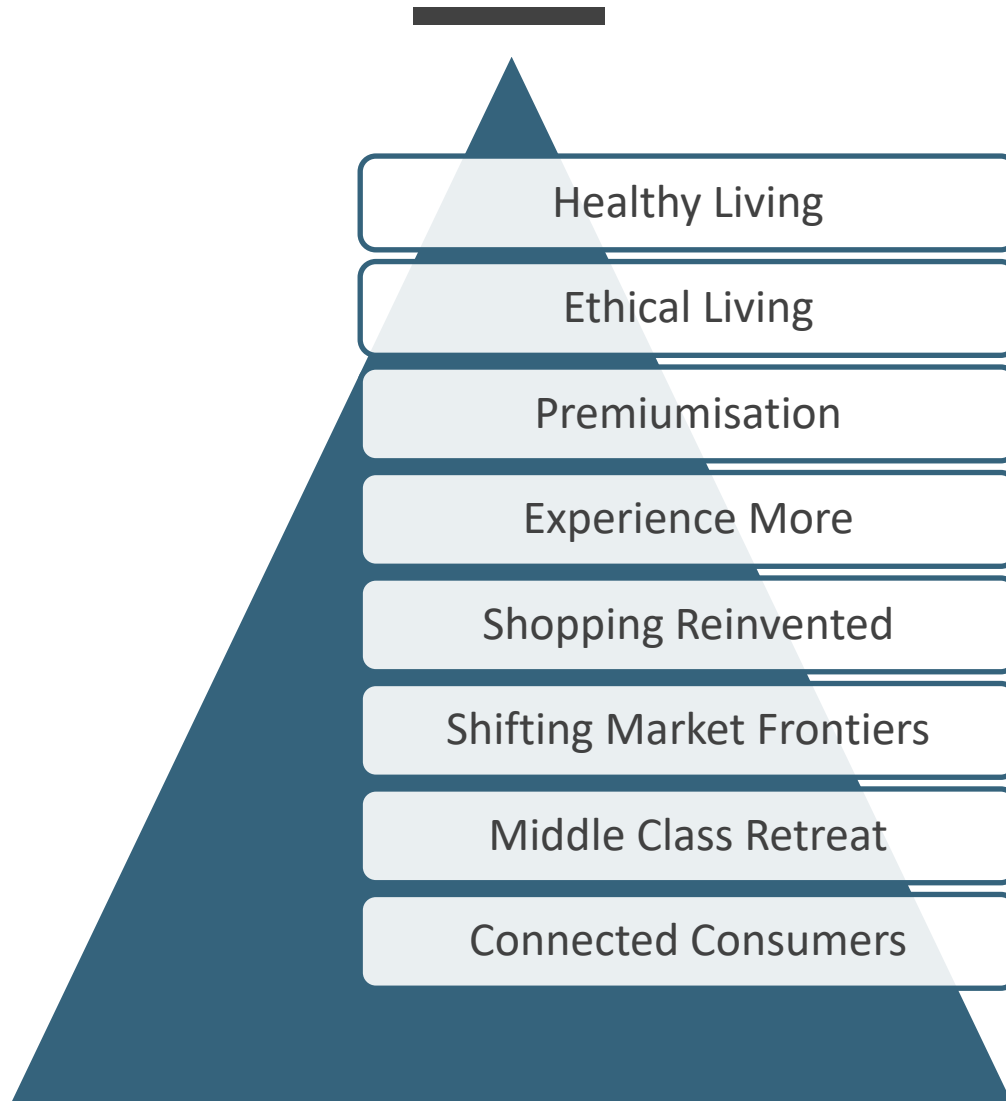
## Positions in packaged food, 2018



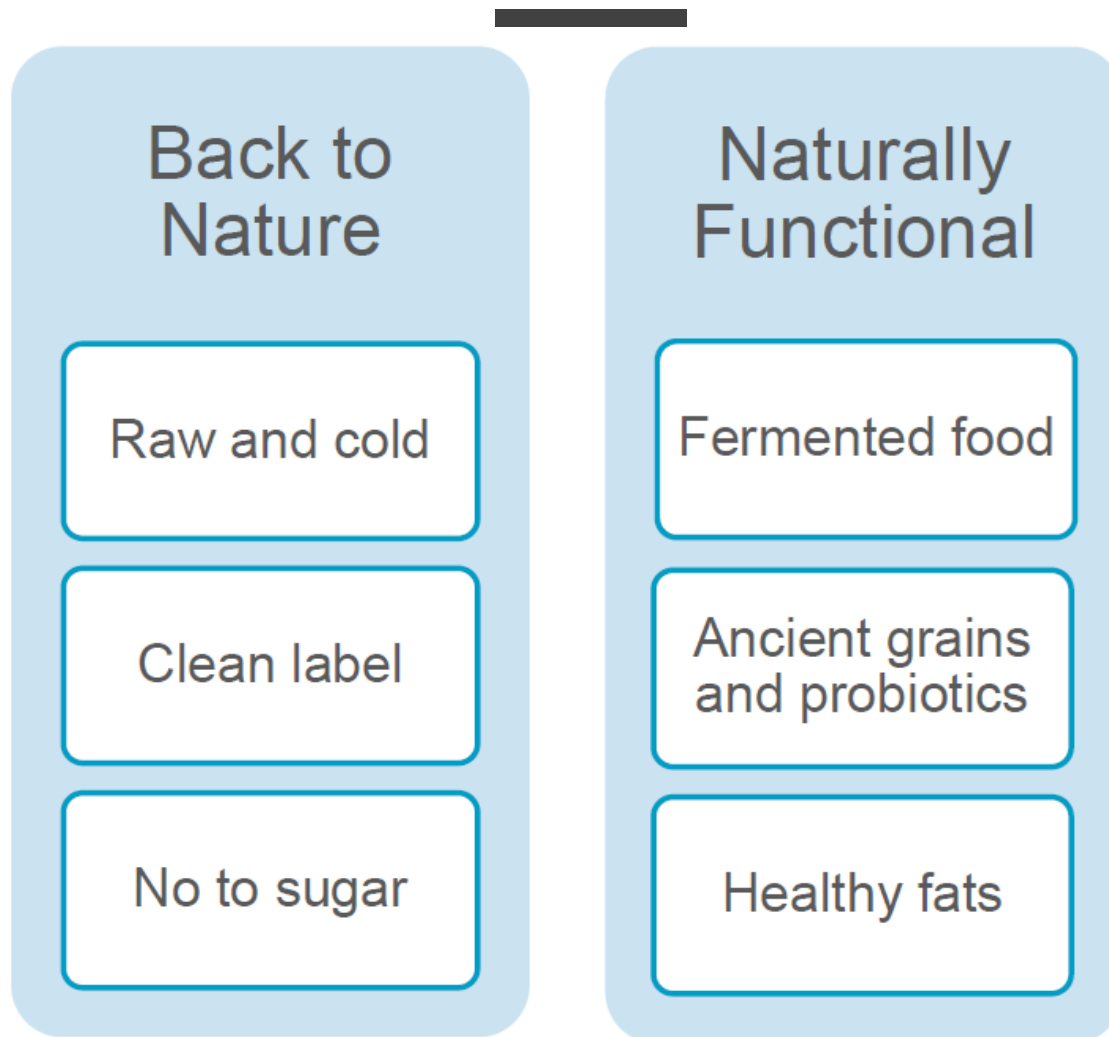
- Other Packaged Food
- Cereal Bars
- Pasta
- Savoury Biscuits
- Breakfast Cereals
- Noodles
- Rice
- Sweet Biscuits
- Baked Goods



## 8 Food Trends for 2018

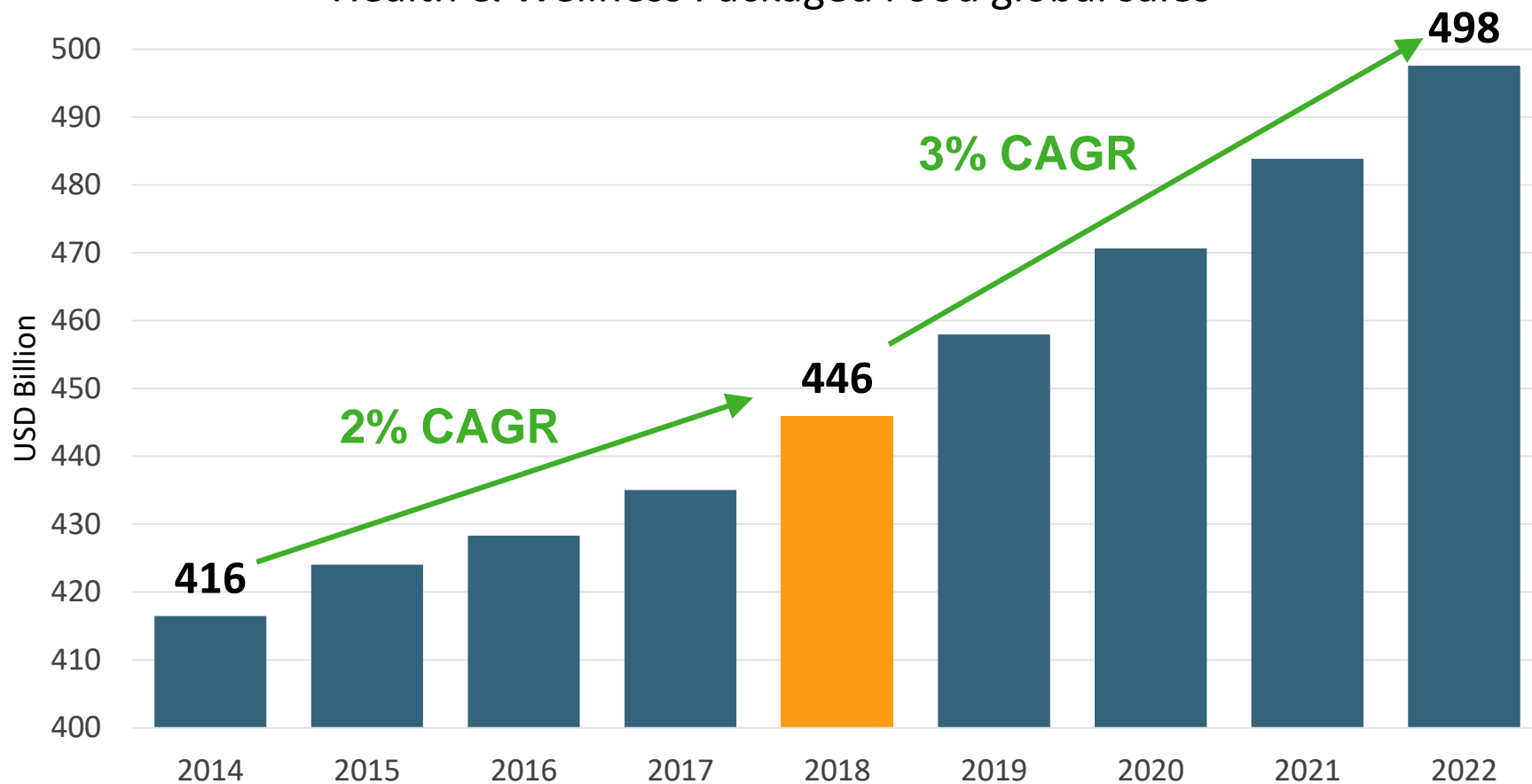


## Megatrend 1: Healthy Living



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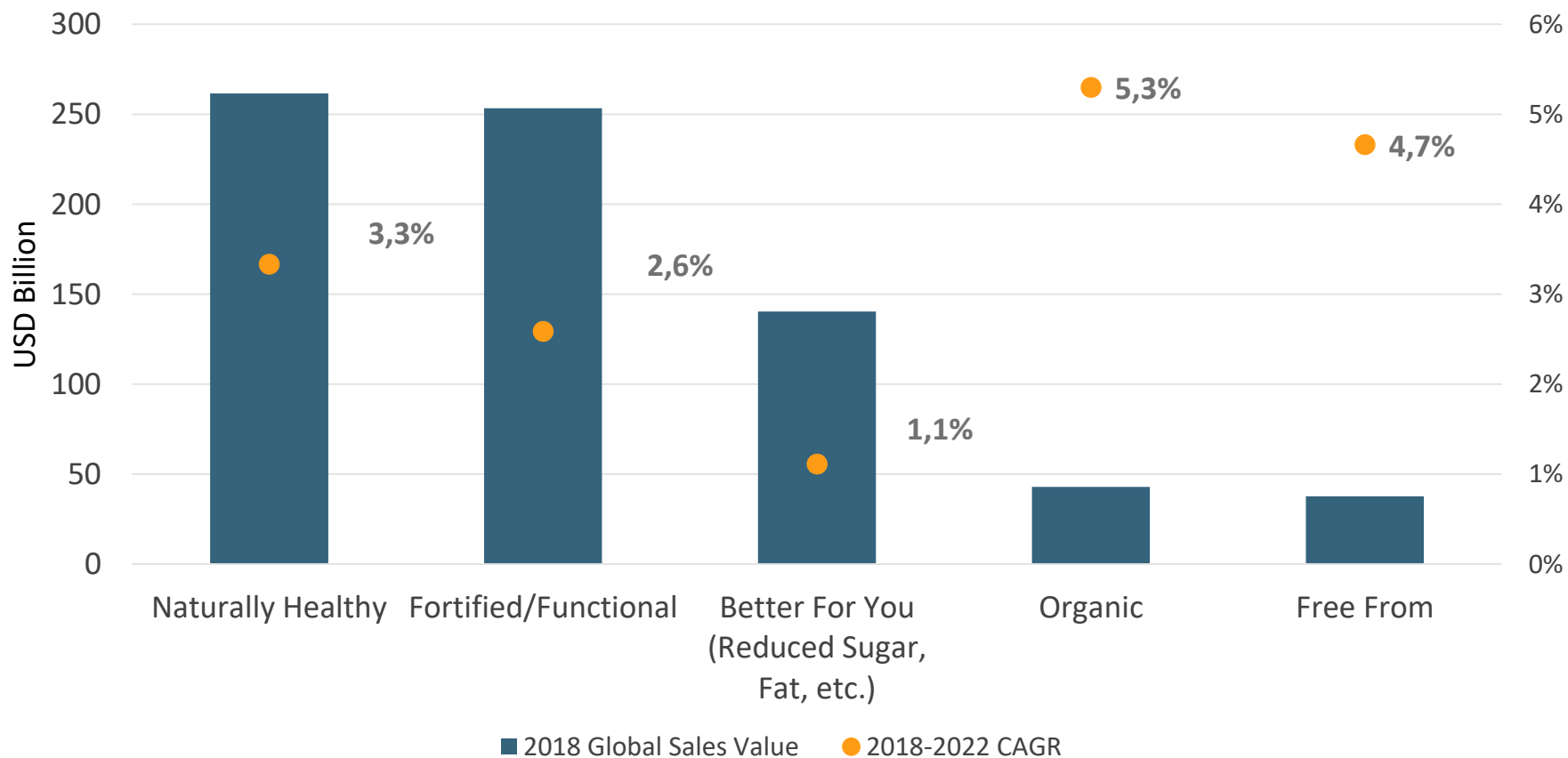
### Health & Wellness Packaged Food global sales



Constant 2017 prices, fixed 2017 exchange rate

# Megatrend 1: Healthy Living

## Health and Wellness Packaged Food by Type

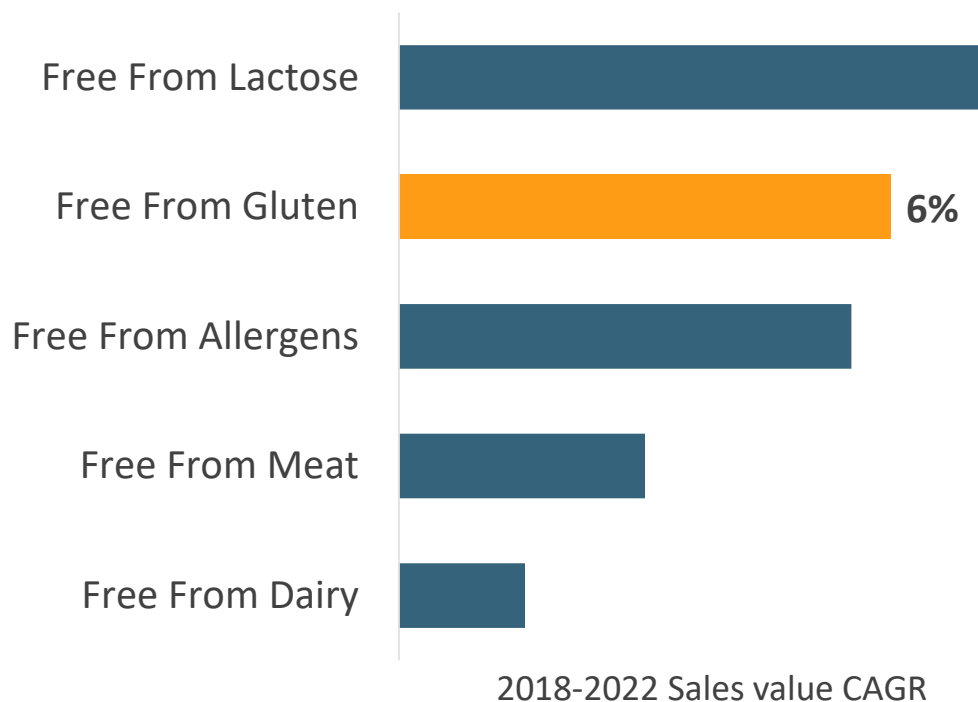


Constant 2017 prices, fixed 2017 exchange rate



## Megatrend 1: Healthy Living

### Free From products forecast

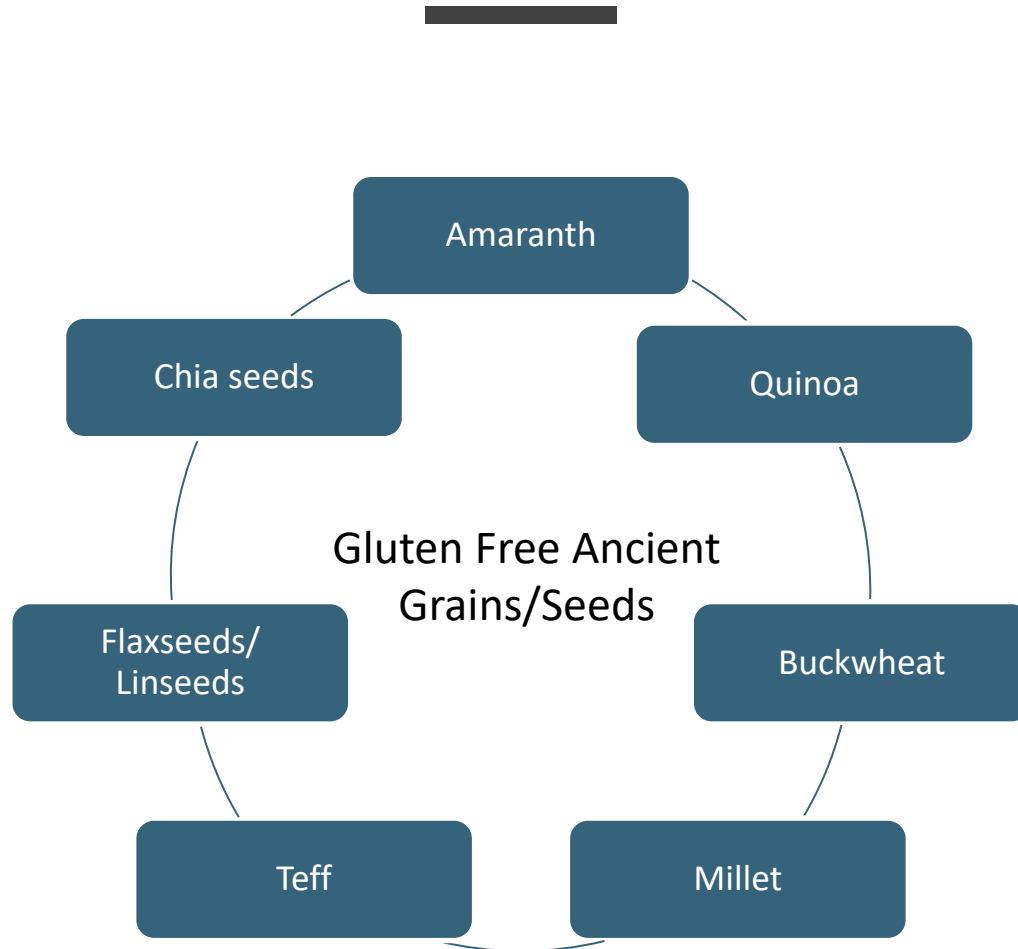


- Gluten-free Packaged Food is forecasted to see a **6% value CAGR**

- **To be driven not only by medical reasons**, but also by healthy perception

USD, Constant 2017 prices, fixed 2017 exchange rate

# Megatrend 1: Healthy Living



# Megatrend 1: Healthy Living

## Successful examples

GERMANY  
Dr. Karg's by Dr.  
Klaus Karg KG



Source: dr-karg.de

- Launched in 2018
- Two different ancient grains (spelt and quinoa)

HUNGARY  
White Snack by  
Szimita-Trade Kft



Source: fcsemege.hu

- Launched in 2018
- One of the first quinoa snacks in the country

SWEDEN  
Paulun's by Orkla  
Foods Sverige AB



Source: pauluns.se

- Launched in 2018
- Rice with quinoa, black eyed peas and sunflower seeds

TURKEY  
Go Nutri by Vitalia  
Nikola Ltd.



Source: own photo

- Launched in 2017
- Contains quinoa seeds, buckwheat

# Megatrend 1: Healthy Living

## Successful examples

### BULGARIA

#### Nutripan by Savimex



Source: facebook.com/savimex.bg

- Launched in 2018
- 2 varieties: quinoa and chia
- Sliced convenient

### POLAND

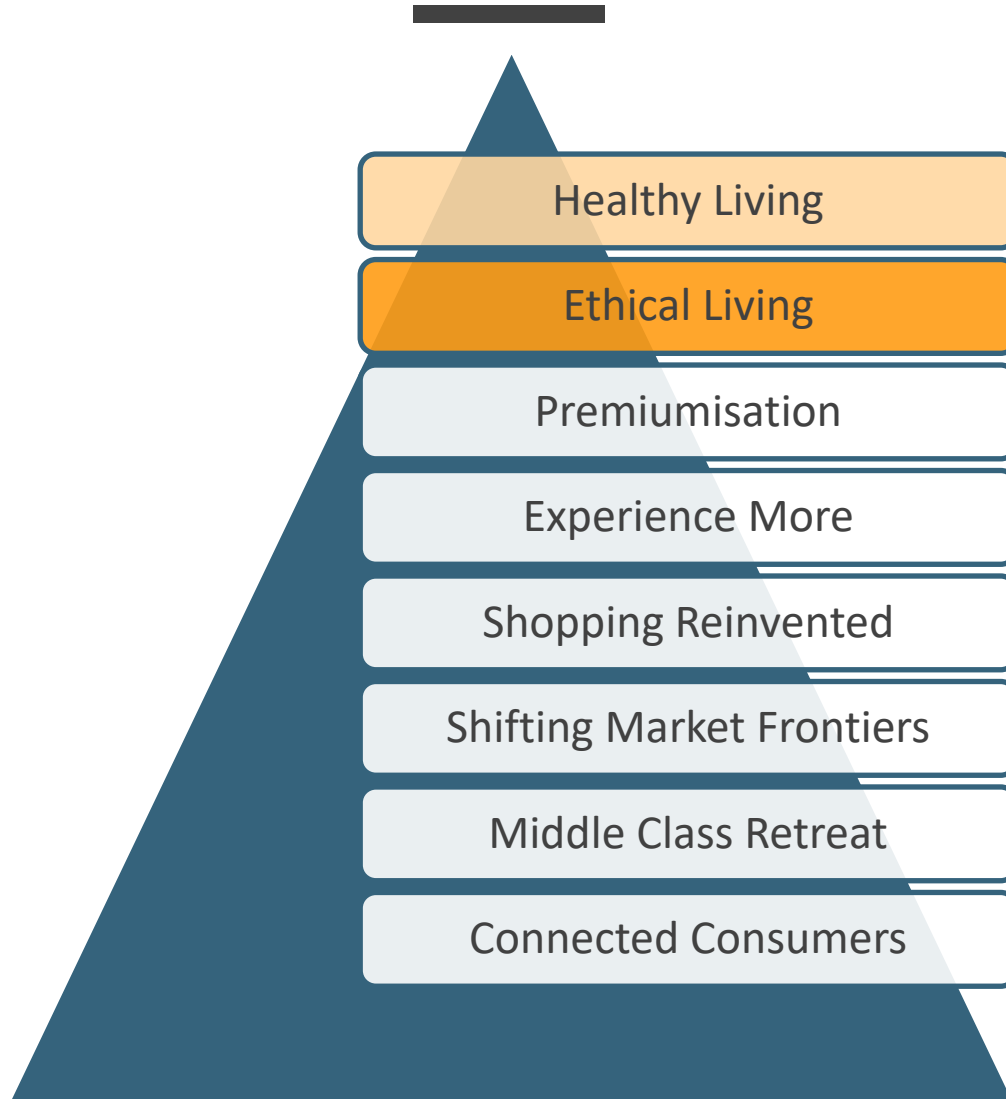
#### DayUp by Arteta Sp Zoo



Source: dayup.eu

- Launched in 2017
- Cereal bar: clean label
- Yoghurt: Contains quinoa

## 8 Food Trends for 2018



## Megatrend 2: Ethical Living



70% of priority ingredients  
“responsibly sourced”  
by 2020.



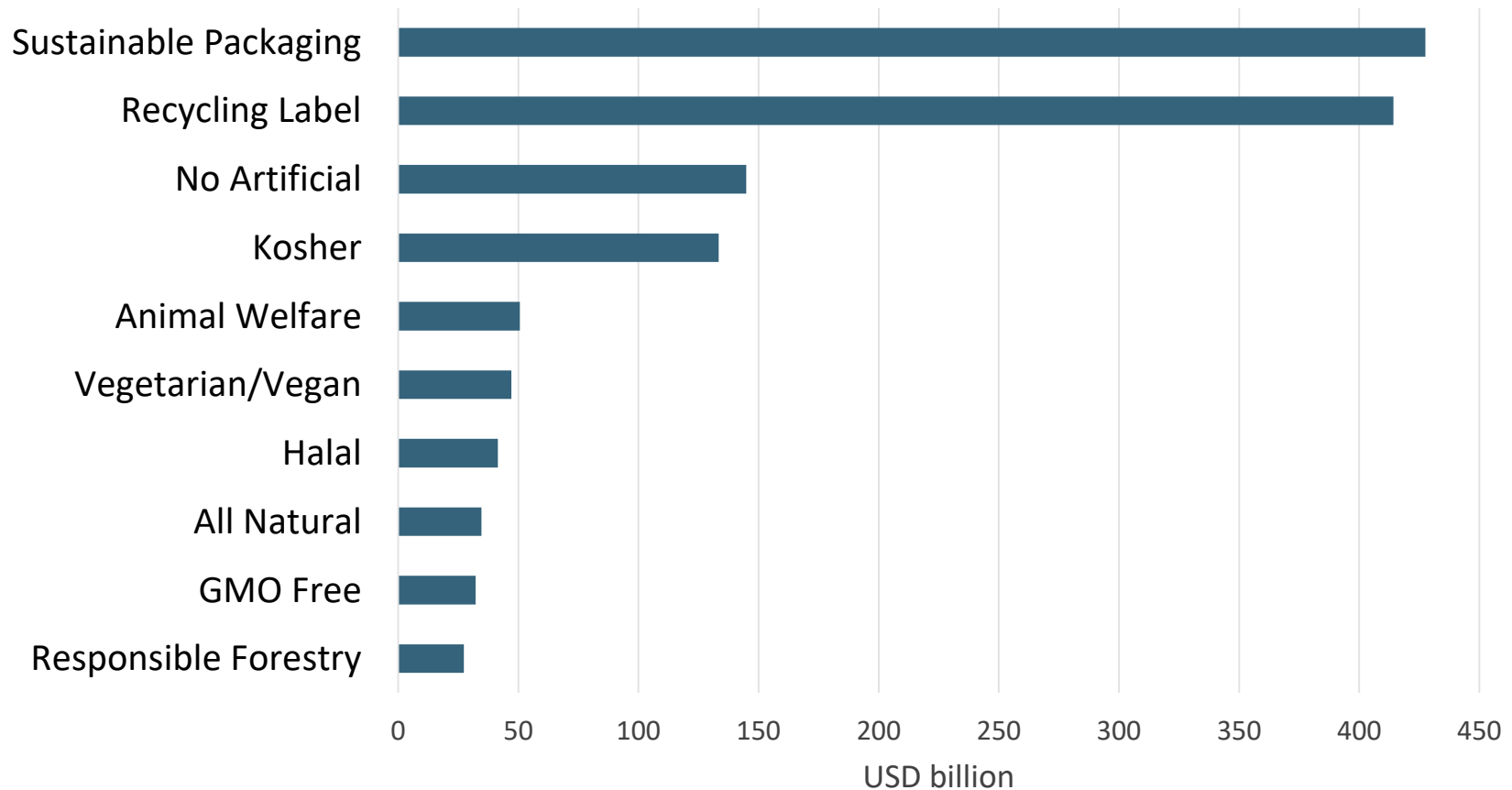
100% of packaging re-usable  
or recyclable by 2025 and **50%**  
**recycled** content in packaging  
by 2030



15% reduction in CO2  
emissions by 2020

## Megatrend 2: Ethical Living

### Top 10 Claims by global sales value in 2018



Constant 2016 prices, fixed 2016 exchange rate

## Megatrend 2: Ethical Living

### Successful examples

#### SWEDEN

##### Polarbröd by Polarbröd AB



Source: packnet.se

- Launched in 2018
- Bio packaging made of sugar cane

#### FINLAND

##### Sirkkalipa by Oy Karl Fazer Ab



Source: eastonhelsinki.fi

- Launched in 2017
- Bread with powdered crickets

#### UNITED KINGDOM

##### Freee by Doves Farm Foods Ltd.

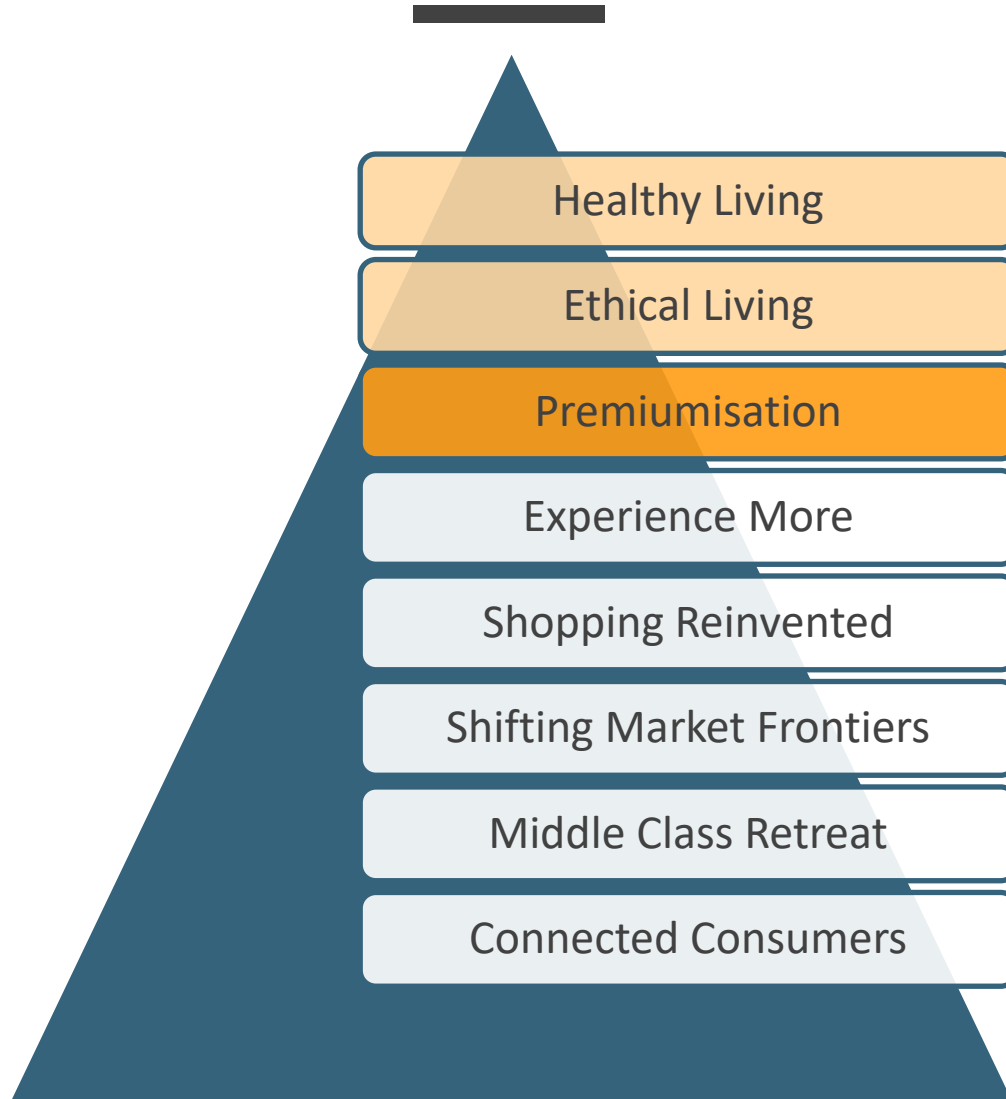


Source: superfood-market.com

- Launched in 2017
- Maize & Rice Lasagna
- Coeliac UK charity, Kosher



## 8 Food Trends for 2018



## Megatrend 3: Premiumisation

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## Megatrend 3: Premiumisation

### Successful examples

#### HONG KONG

##### Dashijie by Dashijie Company Ltd



Source: [dashijie.com.hk](http://dashijie.com.hk)

- Launched in 2017
- Online cooking tutorial, social media interaction collaboration with upscale retailers
- More than ten times the average retail price of mass brands

#### NIGERIA

##### Sona Bites by Sona Agro Allied Foods Limited



Source: own photo

- Launched in 2017
- Uniquely packaged in plastic jars
- Positioned as 'Extra Premium', 100% locally sourced and natural

#### SWEDEN

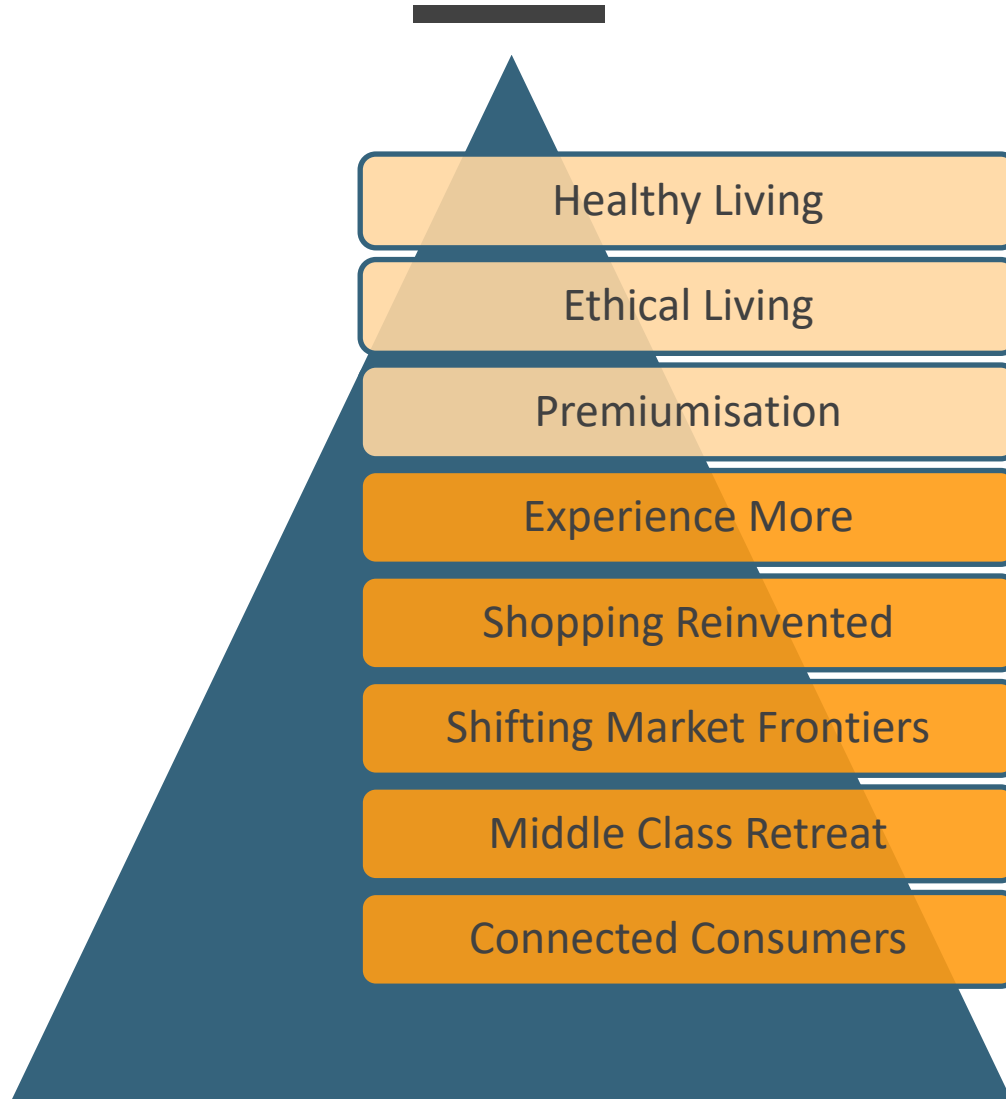
##### Amaranth Sourdough Bun by Renée Voltaire



Source: [reneevoitaire.se](http://reneevoitaire.se)

- Launched in 2018
- More than 2 times more expensive than mass brands
- Marketed as vegan, organic, gluten-free
- High-quality convenience

## 8 Food Trends for 2018



## Middle Class Retreat

Affordable  
Quality

Snack  
replacements

Single portions

Trading down

Thrill of the deal



Source: own photo

Quaker by PepsiCo  
Canada

- Launched in 2017
- Single-portion Cereals
- Targets younger consumers and parents living a **busy life but value a healthy breakfast**

## Shopping Reinvented

### Alternative Business Models

Subscription models

Blended stores

Just-in-time delivery



### MyMuesli, Germany

- Launched in 2007
- Consumers pick contents online or in mix stores



Source: own photo

### One Day More, Poland

- Launched in 2016
- Option to pick ingredients online

## Connected Consumers/ Experience More



Source: own photo

Argentina

Formis Cianos by Bagley Argentina SA

- Launched in 2017
- Contains a figure that can be scanned for playing in a smart phone or tablet



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What are grain-based products?

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**Identifying Key Markets**

Key Findings



## Identifying key markets

2018-2023 Retail Value CAGR,  
USD, constant 2018 prices, fixed 2018 exchange rate

	Baked Goods	Breakfast Cereals	Cereal Bars	Noodles	Pasta	Rice	Savoury Snacks	Sweet Biscuits
Middle East and Africa	6%	4%	8%	6%	5%	4%	5%	3%
Eastern Europe	5%	4%	5%	4%	3%	4%	4%	2%
North America	2%	3%	4%	3%	2%	3%	3%	2%
Asia Pacific	1%	3%	3%	3%	1%	3%	3%	2%
Australasia	1%	1%	0%	2%	1%	2%	3%	1%
Latin America	1%	1%	-1%	1%	0%	1%	2%	1%
Western Europe	0%	-2%	-1%	1%	0%	1%	2%	0%

## Identifying Key Markets

### UAE and Gulf region:

- Governmental efforts to address obesity and diabetes
- Quinoa is most attractive grain



Quinoa Bread by Modern Bakery LLC

### ISRAEL:

- Efshari-Bari national programme from the Ministry of Health
- Growing potential of other ancient grains (spelt, teff)



Spelt Bread by J & E Berman Ltd

## Identifying key markets

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Eastern Europe	5%	4%	5%	4%	3%	4%	4%	2%
North America	2%	3%	4%	3%	2%	3%	3%	2%
Asia Pacific	1%	3%	3%	3%	1%	3%	3%	2%
Australasia	1%	1%	0%	2%	1%	2%	3%	1%
Latin America	1%	1%	-1%	1%	0%	1%	2%	1%
Western Europe	0%	-2%	-1%	1%	0%	1%	2%	0%

## Identifying Key Markets

Bio, Natural and Ethical positioning supports Breakfast Cereals in France



Jardin Bio by Groupe Léa Nature

- Organic Farming
- Gluten/Lactose Free
- Locally Sourced
- Fairtrade
- 100% Compostable

Strongest value growth in breakfast cereals in France in 2018



Source: [jardinbio.fr](http://jardinbio.fr)

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**Key Findings**



## Key findings

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- 1. Ancient grains** have huge potential in a variety of categories
- 2. Sustainability and ethical labelling** provide significant advantage
- 3. Positioning and premiumisation** turn basic products into trendy
- 4. Tap into multiple megatrends** at once
- Identifying consumer trends helps to excel in **growing markets** and successfully compete in **developed markets**

# Thank you

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