



Imperial College
London

Some Global Food Industry Developments: Implications for the Canadian Pork Industry

Dr. David Hughes

Emeritus Professor of Food Marketing

Banff Pork Seminar 2019

Fairmont Banff Springs Hotel

Banff, Alberta, Canada

Wednesday, January 9th, 2019



@profdavidhughes

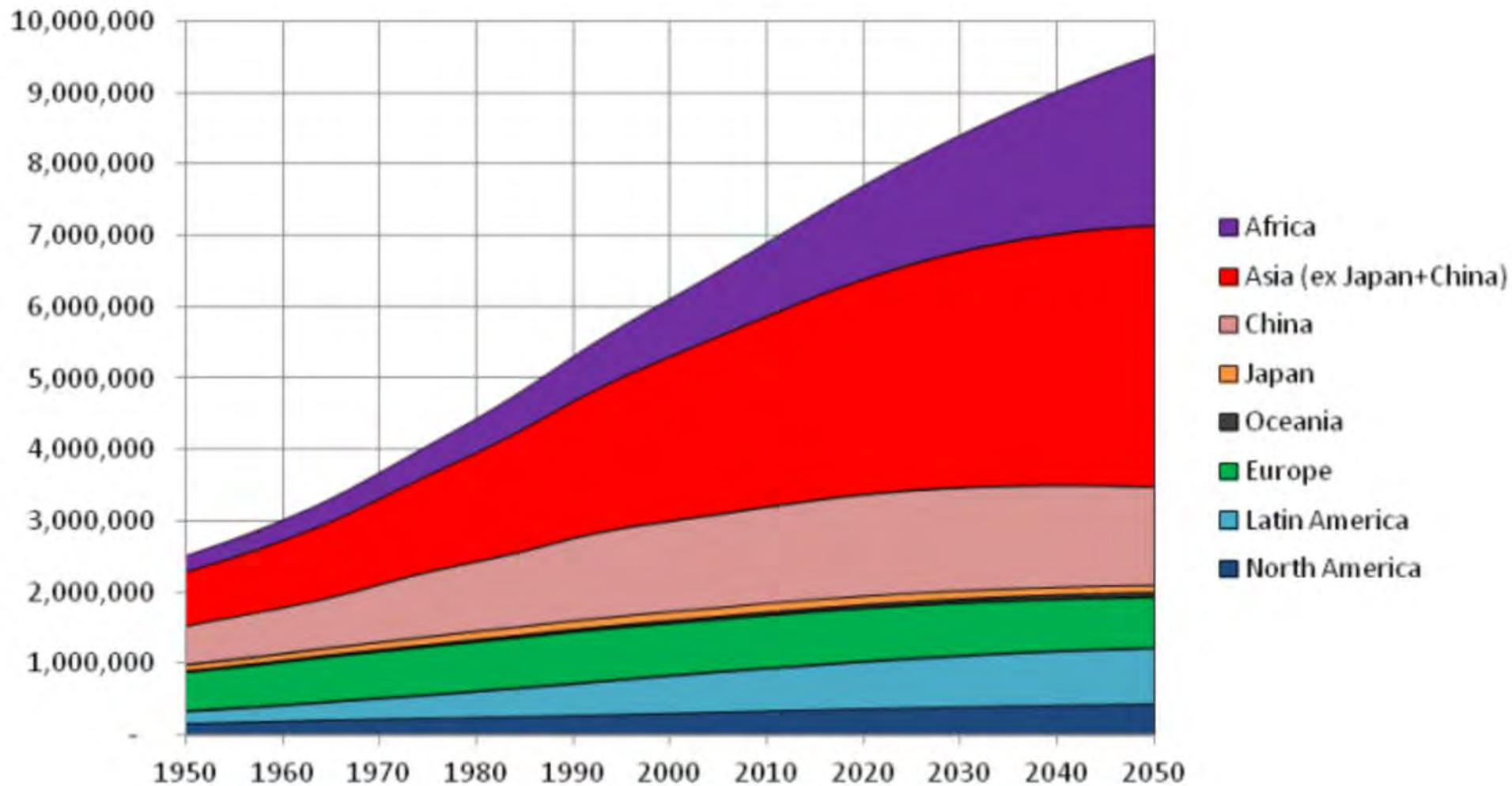
www.supermarketsinyourpocket.com



Heading for 10 Billion by 2050!

World Population

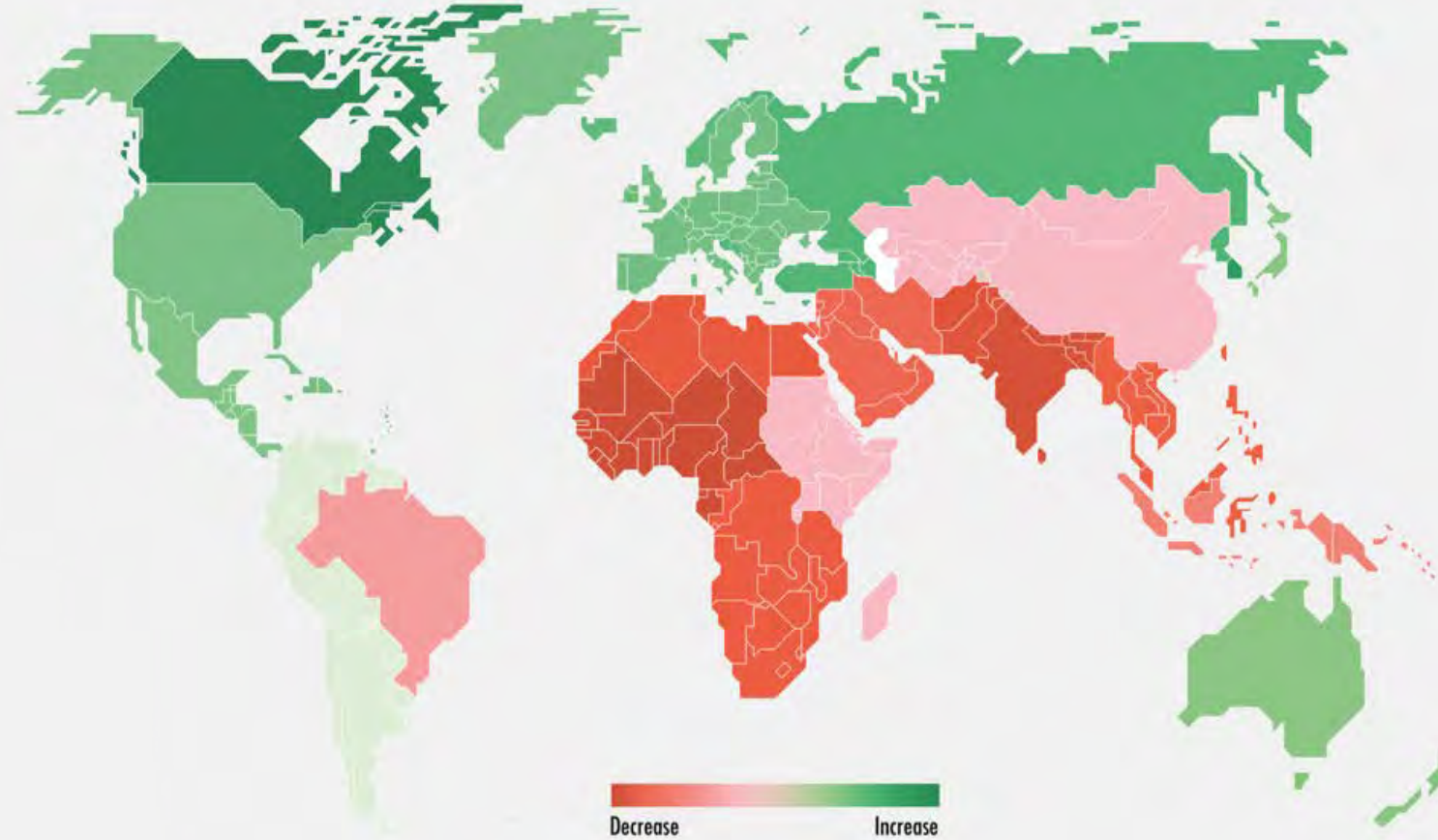
Source: UN



We're Adding 2 Billion
By 2050. Evenly Spread?



CHANGES IN AGRICULTURAL PRODUCTION IN 2050: CLIMATE CHANGE RELATIVE TO THE BASELINE

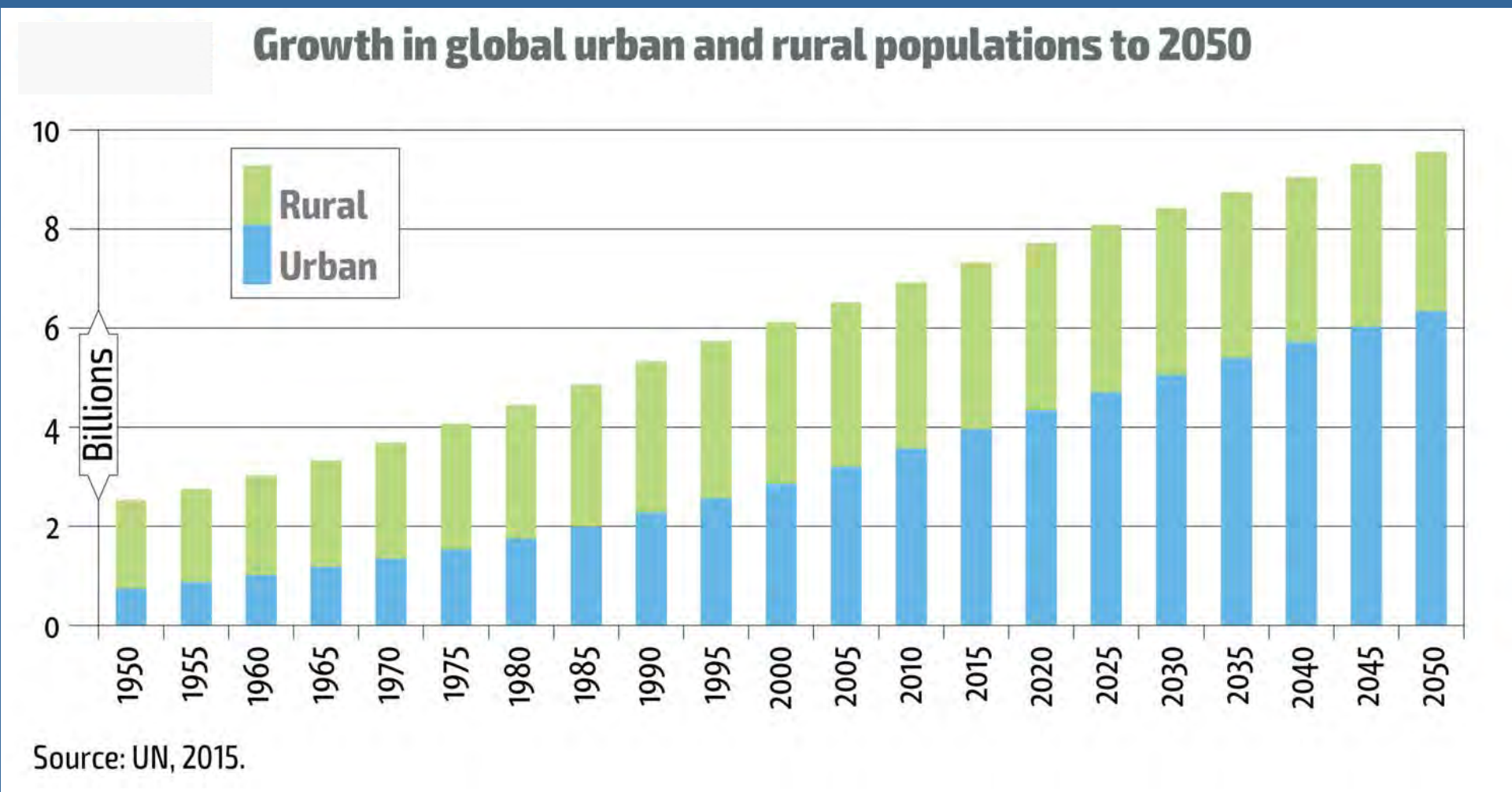


Dr. Food @ProfDavidHughes

Climate change-induced declines in agricultural production forecasted for Africa & much of Asia by 2050 (FAO). Hmmm, those are the same regions which will see the lion's share of the anticipated 2 bn. extra people in our world by then! Good news for some big commodity exporters.



Urban Consumers Increasing from 4 to 6 Billion Over the Next 30 Years: With Smaller Households, Higher Incomes, Changing Diets



Focus Switches from Countries (196) to Mega-Cities (600) by 2050

Chinese Cities with the Purchasing Powers of Countries!

Rank	Chinese City	City GDP (2015, PPP, in billions)	Comparable Country
#1	Shanghai	\$810	Philippines
#2	Beijing	\$664	U.A.E.
#3	Guangzhou	\$524	Switzerland
#4	Shenzhen	\$491	Sweden
#5	Tianjin	\$478	Romania
#6	Suzhou	\$440	Austria
#7	Chongqing	\$425	Chile
#8	Hong Kong	\$414	Peru
#9	Wuhan	\$324	Israel
#10	Chengdu	\$306	Norway





Global Differences In What Shoppers Value in Meat



Thanks to data, Spicy Snickers really satisfies Chinese consumers

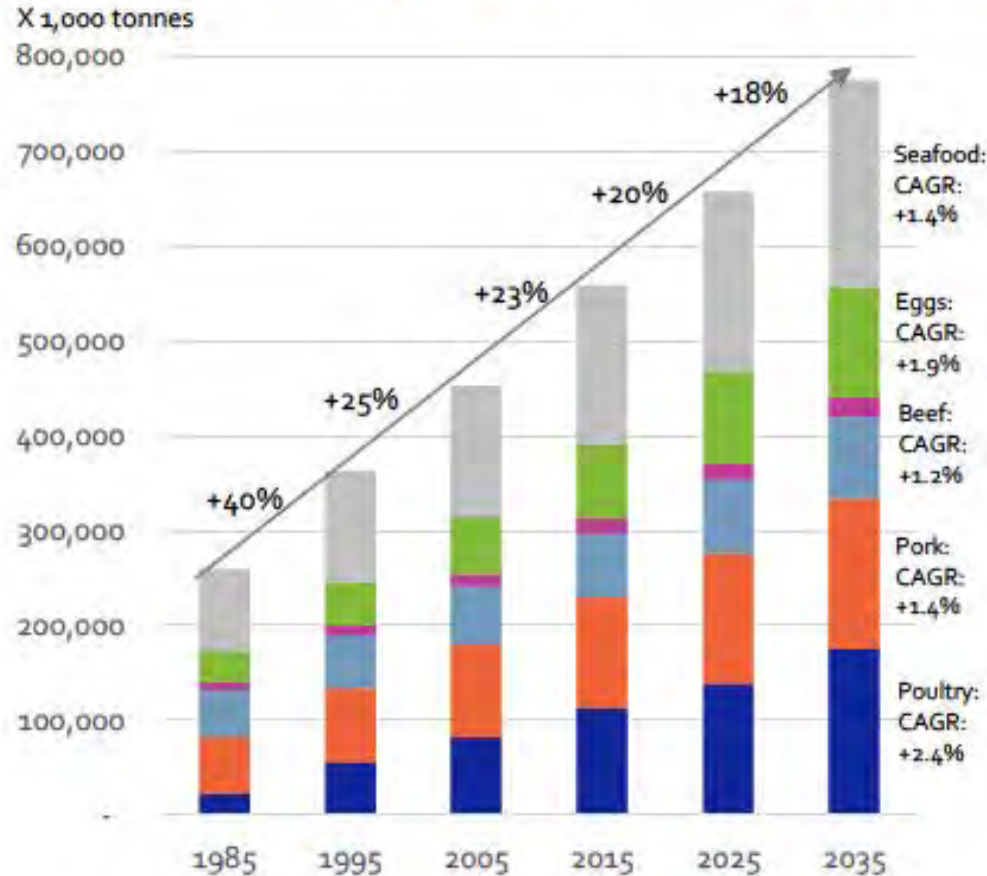
October, 2018

Mars Works with Alibaba Shopper Data Specialists To Launch Quickly & Successfully Spicy Snickers



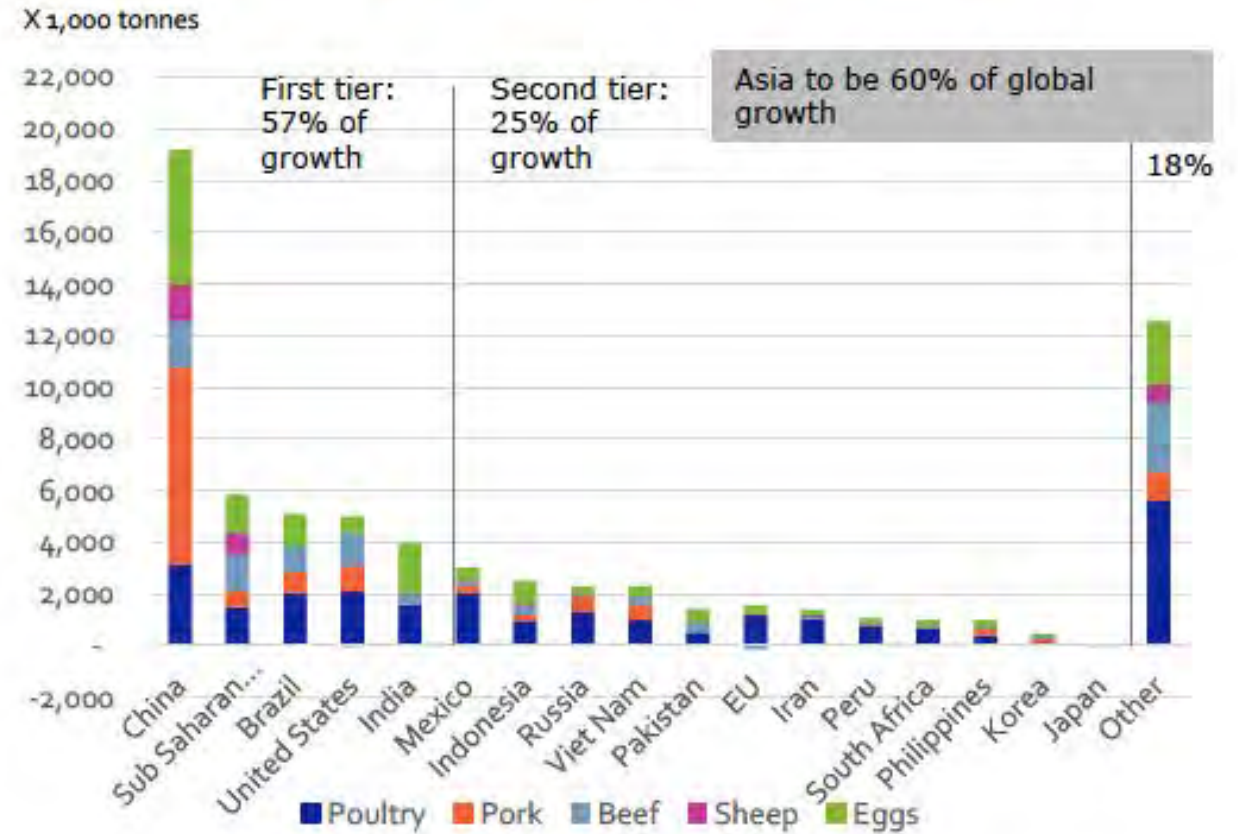
Global Outlook for Meat and Eggs Looks Encouraging

Global animal protein market outlook

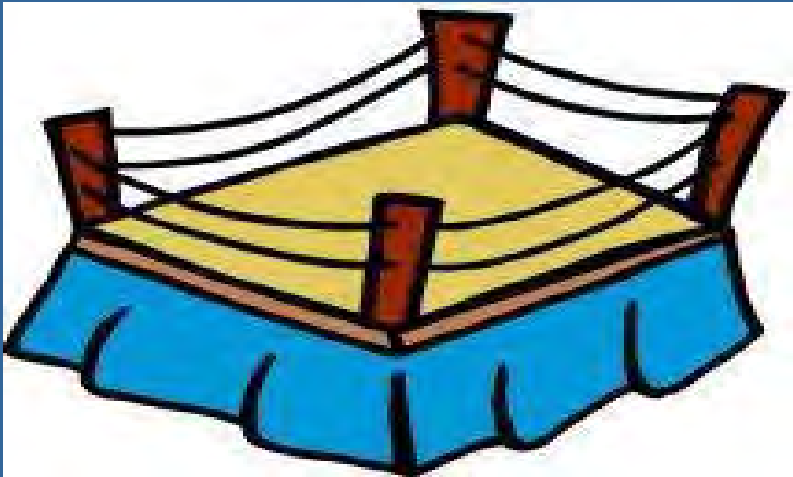


Source: Rabobank projections based on FAO, USDA, OECD and local statistics, 2018

Where is the growth in next decade?



Pork Should Keep Out of the Way in Global Battle Between Industrially Produced Chicken and Fish





White Fish Fillet*
& Chicken Breast
Head-to-Head
Competitors
Worldwide



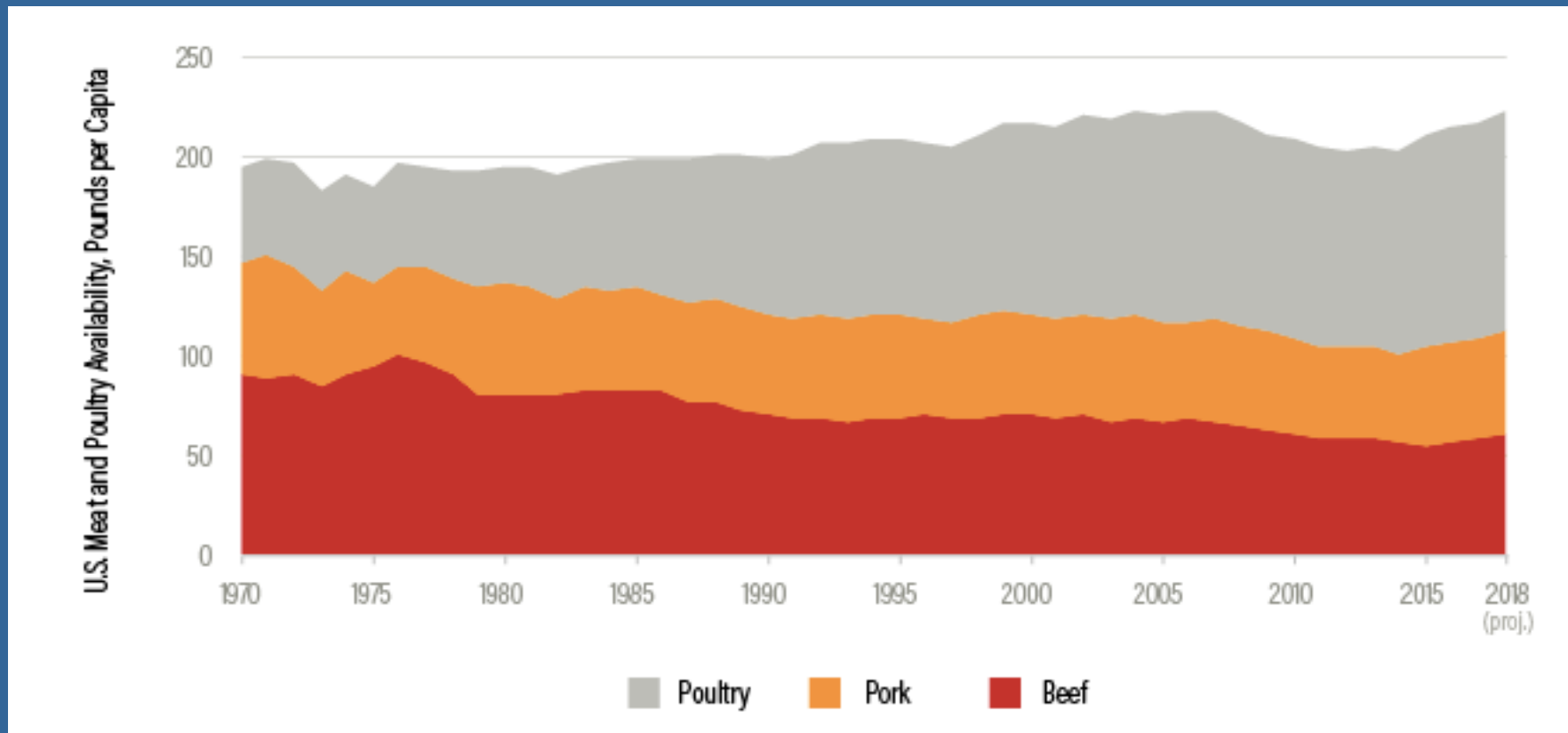
Both
Approx.
us\$3/kg.

* Tilapia and Pangasius (Basa/Cat Fish)

Meat: Making America Great Again?!



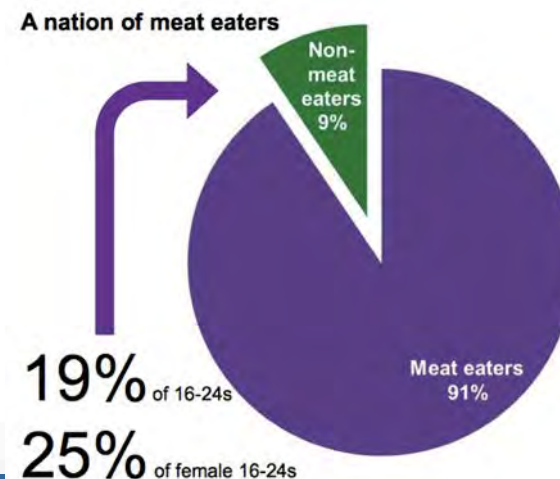
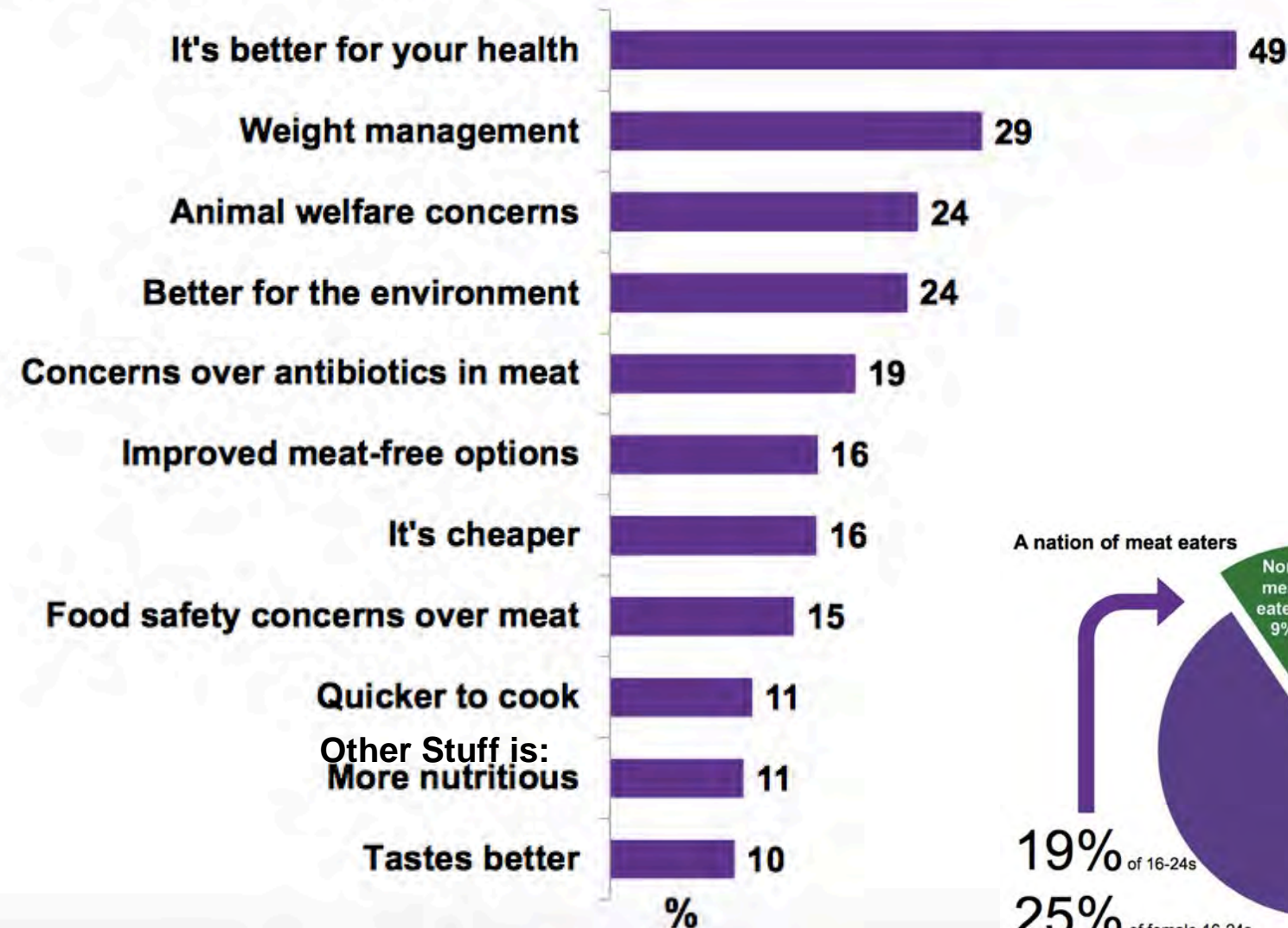
Well done! Americans will eat a record amount of meat and poultry in 2018



Rise of The Flexitarian in High Income Countries



Why are people cutting back?



The flexitarian consumer:

- Women
- 25-34s
- ABs
- High-earners
- People living in London
- Consumers most likely to buy into free-from foods (eg gluten-free)

Mind you, Asian consumers are intrinsically Flexitarian!





It's Cool NOT Wussy
For Men to be Concerned
About Their Health and
About Their Looks!

Pulses Complement Meat
In Flexitarian Products



“ Not only will
we see more vegan
and vegetarian
options, but products
like pizzas, lasagnes
and pies will replace
a proportion of their
meat with plants ”

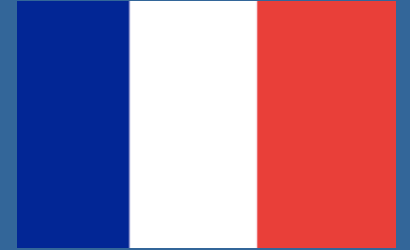


Pick of the Week

£1.⁹⁹

each £5.69/kg





Flexitarian French!



Bill Gates and Richard Branson Back Startup That Grows 'Clean Meat'



Memphis Meats: Richard Branson predicts the world will no longer need to kill animals in 30 years

Protein innovation: Cargill invests in cultured meats



Invests in January, 2018

The evolution of lab-grown meat: Aleph Farms creates “first” cell-grown steak

“We’re shaping the future of the meat industry — literally,” says Didier Toubia, Co-Founder and CEO of Aleph Farms. December 12th, 2018





In Canada, a similar notice has been posted at select A&W locations (Photo: Reddit)



Dr. Food @ProfDavidHughes

In Alberta, Canada last week. Beyond Meat plant-based burgers sold out in A&W outlets & in Whole Foods supermarkets. Got one in Red Deer: looks/tastes like a decent regular burger although the "meat patty" is a little softer than the real thing. @ £4, 15% price premium over beef.



**SMOKED APPLE SAGE
SAUSAGE**



ITALIAN SAUSAGE



**MEXICAN CHIPOTLE
SAUSAGE**



MORNINGSTAR FARMS® BACON STRIPS



McDonald's joins the Veganuary craze by offering its first ever vegetarian Happy Meal for children

January 3rd, 2019

- The new Happy Meal features a breaded red pesto goujon wrap instead of meat
- A similar wrap will also be available on the adult menu as a Spicy Veggie Wrap
- The meals were created with the help of campaign group the Vegetarian Society





GREGGS
the bakers



Beloved of Blue Collar Britain

'I'll be sleeping outside Greggs like it's a royal wedding': FEMAIL puts new VEGAN sausage roll to the test as social media erupts in anticipation... but will it outscore its meat rival?

- New vegan sausage roll will launch at 950 stores across the UK from tomorrow
- Five of our writers did blind taste test of vegan option against traditional pastry
- Twitter has been going wild over announcement, with Greggs trending in UK

Daily Mail
MailOnline

The sausage's roll's meat-free pastry has a Quorn filling instead of pork and it will cost £1

January 3rd, 2019

Imperial College
London

PIZZA HUT UK LAUNCHES CHEESY VEGAN JACKFRUIT PIZZA IN ALL 253 LOCATIONS

January 2nd, 2019



A Teaser Veganuary New Product Albeit
Priced Eye-Wateringly High (£11.50)



• EXCELLENT SOURCE OF FIBER
• SOY FREE
• GLUTEN FREE
• MEAT-LIKE TEXTURE
• VEGAN

the healthy main dish

the JACKFRUIT company™

New Tastier Recipe!

SERVING SUGGESTION

BBQ JACKFRUIT
A TOMATO-BASED BLEND OF SWEET AND SMOKY MESQUITE

NET WT
10 OZ (284 g)

KEEP REFRIGERATED

NON GMO Project VERIFIED
nongmoproject.org



“Pulled Jackfruit”
Copying “Pulled Pork”



Vegan Beyond Burger Launches in 1,000 Carl's Jr. Restaurants Across The US

The patty is part of a veganizable sandwich featuring cheese, lettuce, tomato, sliced onion, dill pickle, special sauce, and mayonnaise



January 2nd, 2019

Veggieburgers Adorn Italian Supermarket Shelves



Zero meat: Japanese firm Otsuka Foods enters plant-based meat market



December 10th, 2018



Otsuka Foods has launched the brand "Zero Meat", which currently consists of burger patties made from soy.

Unilever buys meat-free food company The Vegetarian Butcher

December 19th, 2018

Acquisition of Dutch brand highlights scramble to tap into meat substitutes market



▲ Tofu turkey is on the table for this Christmas, just one ingredient of a surge in the meat alternatives market.
Photograph: Alamy Stock Photo

Unilever is buying the meat-substitute company The Vegetarian Butcher as it looks to cash in on the growing number of consumers turning their backs on meat.

Nestle Plans Vegan Push With No-Meat Burger, Purple Walnut Milk

Jan. 1st, 2019

Seeking millennial cred with alternative proteins, the Swiss giant sees its vegan business reaching \$1 billion within 10 years



Gosh!

PLANTS NEVER
TASTED THIS
GOOD

100% VEGAN & FREE FROM



Gosh! Looking for
Financial Suitors
November 2018

Quorn to spend GBP150m to increase production at UK plant



Quorn is a \$1 bn. Global Brand in the Making
Quorn owned by Monde Nissin from The Philippines



'Fake Meat' Labeling Bill Passes in Missouri
May 18th, 2018





Turns out my Mum was right, we need to eat more veg

Meet the challenger brand helping to take this plant-based movement mainstream

- +135% YoY brand growth
- 65% incremental to category*
- recruiting a younger, more health conscious shopper**
- lots more plant-powered innovation and marketing plans set to land in 2019

Contact

sales@bolfoods.com if you're interested in stocking
hello@bolfoods.com to talk plans and plants with Paul

bolfoods.com

*Nielsen Online Consumer Panel 2018 **Nielsen data from Self-Serve vs average Sainsbury's shopper 18w/18 13.10.18

BOL
eat plants love life



UK: "Wicked" chef creates plant-based dishes for new Tesco meal range



Hugely Successful and Range Doubled in December 2018



January 2nd, 2019

MARKS & SPENCER

M&S becomes the latest retailer to launch a vegan range featuring 'dirty' comfort food such as Mac 'n' Cheese -

Tsunami of Vegetarian Products Hit the Shelves Early-January



Sainsbury's



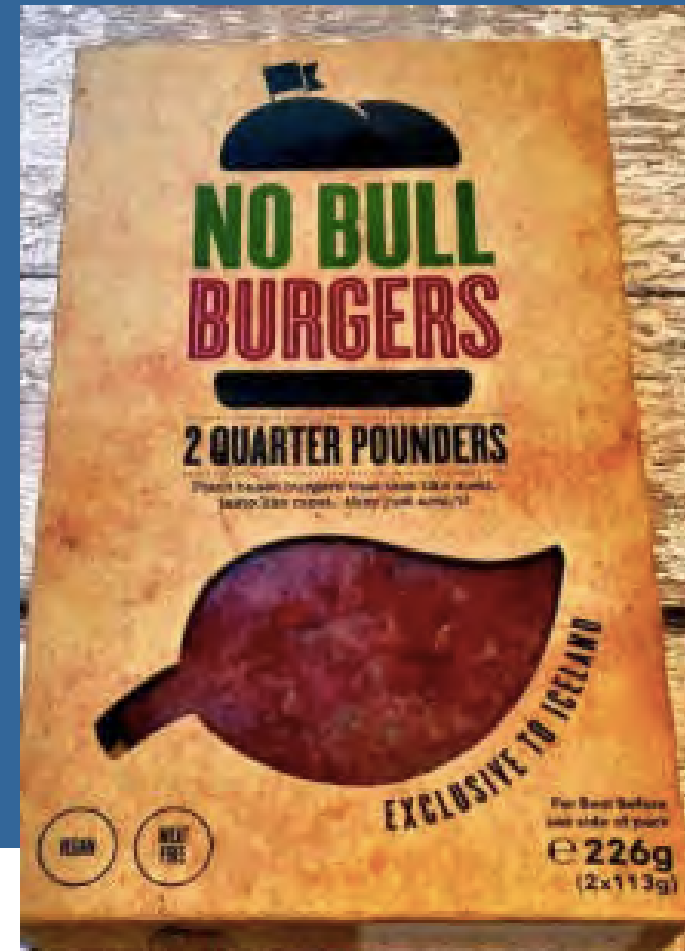
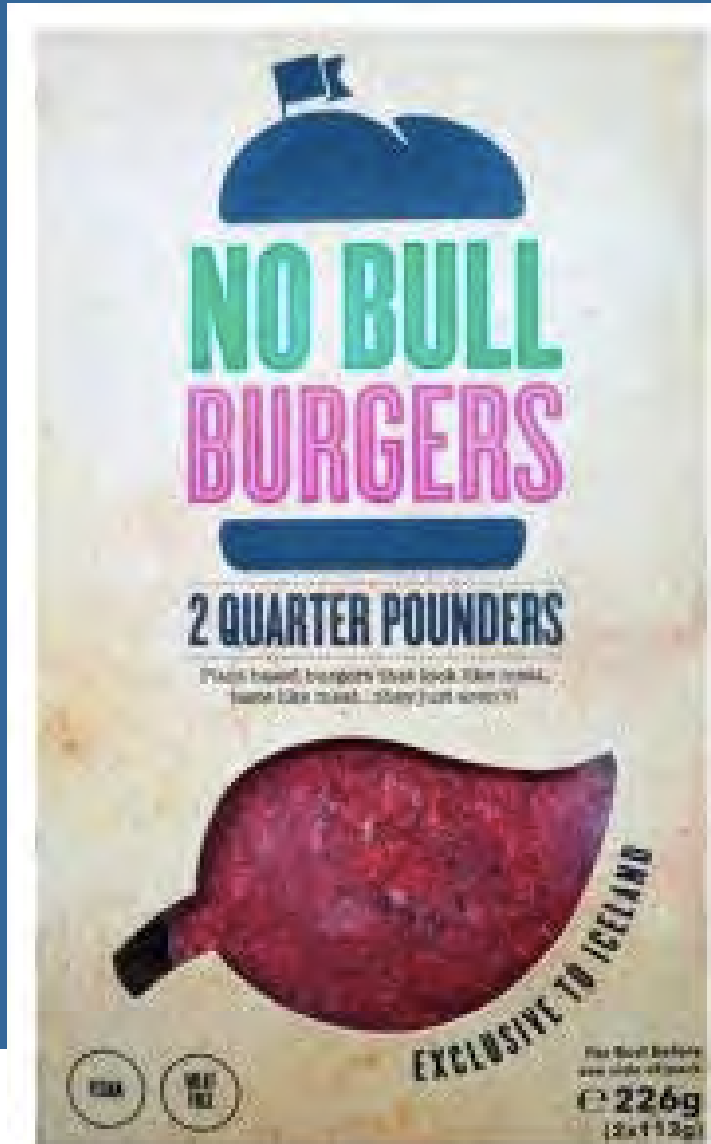
January 2nd, 2019

Iceland



Iceland adds to plant-based range after No Bull burger becomes a cult success

August 8th, 2018



The Meat Industry Needs to Up Its Marketing Game Or, It'll Gets Its Backside Tanned by Millennial Start-Ups!

It's not January, it's Veganuary

We've got more meat and dairy-free dishes than ever before, and Veganuary is the perfect time to try them. You'll find twists on Italian classics to warming Thai curries by searching 'vegan' at sainsburys.co.uk/groceries

Here's one of our faves...

The White Rabbit Pizza Co.
smokin' vegan 340g

Topped with a sprinkling of smoky MozzaRisella, Greek olives, Sicilian chopped tomatoes and baby spinach, this vegan pizza really packs a punch.

£5.00/unit | £1.56/100g



Week 1
£9 off
when you spend

You can scan me in store or just log in to sainsburys.co.uk slot and I'll be waiting in 'Me

*Qualifying spend excludes spirits in Scotland, fuel and other exclu
**Order must be delivered on or be
expiry date.

Week 2
£9 off
when you spend

You can scan me in store just log in to sainsburys.co.uk



Dr. Food @ProfDavidHughes

The red meat industry has to substantially up its marketing game in 2019 or it'll haemorrhage. Here's quirky startup White Rabbit Pizza Co. with a smokin' vegan pizza endorsed by Sainsbury's and linked to JS's "money off" coupons. It's never been easier to be an occasional vegan!

From The Consumer's Perspective, “The World of Protein” Expands

Increasing Demand for Protein Goes Mainstream and It's Much More than Meat: Dairy, Plant-Based, Algae, Insects and More!



Mars Launches Protein Bars Under Snickers and Mars Brands, Answering to the Growing Demand for High Protein Snacks

October 1st, 2018



Me,
Too!





Ticking the Trend Boxes: Protein, Ancient Grains, Almonds, “Natural” Honey

January 2nd, 2019

Protein from Algae



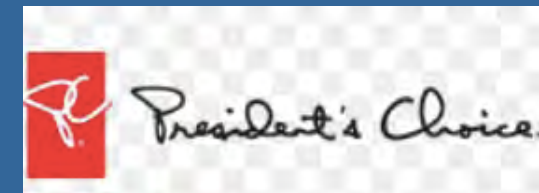
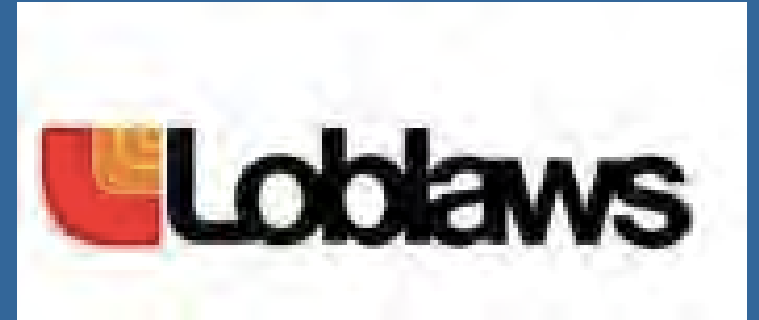
ENERGYbits® are tiny tablets of algae, a sustainable eco-friendly crop so nutritionally dense, it eliminates fatigue and hunger instantly. Want a healthy, natural way to fuel your game or fire up your brain? ENERGYbits® are for you! NO caffeine, sugar, chemicals, gluten or soy, just pure, plant based nutrition. **ONE INGREDIENT, ONE CALORIE and ZERO NET CARBS.** Perfect for Keto, Paleo, Vegan, Low-Carb or Low-Calorie diets. Improve your energy, wellness and waistline all at the same time with Bits®!



energybits links to fitness trend!

Bugs in the grocery aisle; Loblaw adds cricket powder to its PC line

Company says crickets are more sustainable than other forms of animal protein



Germany's PHW Gruppe makes investment in insect burger start-up Bugfoundation



McDonald's championing research into insect feed for chickens

September 27th, 2018

**Is insect protein on the march?
AgriProtein acquires Belgian insect feed
company Millibeter**

December 3rd, 2018



FAKE MEAT

Look, There's a Lot of This about and it's NOT from



**The
Economist**

Avoiding climate chaos: “Reduce meat consumption and go flexitarian,” urges new research

October 11th, 2018

11 Oct 2018 --- Dietary changes are needed to slow the impact of climate change, warns new analysis that says meat consumption should be dramatically reduced in favor of plant-based diets. Considerable differences in farming are needed to avoid the dangers of a warming planet and the challenges of feeding a growing population in a world with more drought, floods, and extreme heat. The in-depth analysis involving the University of Oxford and the Potsdam Institute for Climate Impact Research in Germany (among other researchers) assessed the food systems' environmental impact,



How do your food choices impact on the environment?

Which food would you like?

Pork



How often do you have it?

1-2 times a week



75g, equivalent to three bacon rashers, per serving

Over an entire year your consumption of pork is contributing **140kg** to your annual greenhouse gas emissions.



That's the equivalent of driving a regular petrol car **359 miles (577km)**.



OR

the same as heating the average UK home for **22 days**.

Your consumption of pork also uses



20,519 litres of water, equal to **315 showers** lasting eight minutes.

How do your food choices impact on the environment?

Which food would you like?

Peas



How often do you have it?

1-2 times a week



80g per serving

Over an entire year your consumption of peas is contributing **1.4kg** to your annual greenhouse gas emissions.



That's the equivalent of driving a regular petrol car **4 miles (6km)**.



OR

the same as heating the average UK home for **0.2 days**.

Fun Environmental Tool
that'll Irritate You All!



Imperial College
London



Belgium's new food pyramid puts processed meat in the same section as candy, fries and pizza. Flemish Institute of Healthy Living

HEALTH

ALL Departments of Health
In OECD Countries are Calling
For Reduced Meat Consumption,
Particularly Processed Meat



The Anti-Meat Lobby are:

- Relentless
- Zealous
- Well-Financed

A German Grocery Chain Is Selling First-Of-Its-Kind “No-Kill” Eggs

Every year, billions of male chicks are euthanized by the egg and poultry industry, but new tech could end the chick culling



Don't Tell Consumers that Male Chicks are Routinely Destroyed at Birth. They Might Consider This Practice To Be Barbaric Behaviour!

Male chicks are pretty much useless to the egg and broiler industry; they don't produce eggs and their bodies don't grow as large or as fast as female chickens. Consequently, hatcheries kill off their male chicks within hours of their birth, either suffocating them with gas or running them through a shredder to become animal feed.

Trends and counter trends drive developments of hybrids



Doble Pata Negra Burger Vacuno:
Wagyu And Black Angus Burger

Spain, Jan 2018



Carrefour Le Palet Boeuf Et Vegetal: Beef And
Vegetable Burgers With Seeds

France, Mar 2018



Garden Gourmet Burger Deluxe XL

Netherlands, Apr 2018

MEAT EATERS

BALANCED INNOVATION SWEET SPOT

VEGETARIAN/VEGAN

6



On the Bright Side, Eating Less Meat Yes,, But Willing to Pay More for Better Meat!

The next generation: 'influencer shoppers'

25%

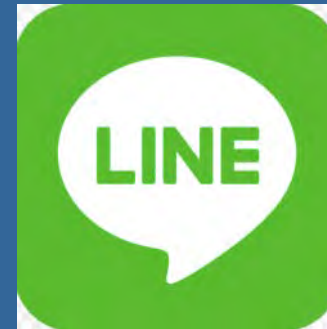
of the British
grocery shopper
population



- YOUNGER
- HIGHER AFFLUENCE
- 1000+ SOCIAL MEDIA FOLLOWERS
- ONLINE REVIEWERS
- EARLY TECH ADOPTERS
- ENGAGE IN FUTURE TRENDS



Social Media Accelerates the Exchange of Information Around the World
Not Least on Food Trends and Between Gen. Z and Millennial Consumers



Consumers continue to evolve



Technology enabled



Experience focused



Vocal



Trust and ethics



Urbanised



Time poor



Diverse



Transparency



Health conscious



Savvy



Ageing



Authenticity





Beef Chili

with cheese and sour cream



READY IN
15
MINUTES



COMPLETE MEAL KIT

Easy Step-by-Step, Recipe
& Portioned Ingredients



SERVES
2



Pork Chop with Sage & Honey Butter

with roasted garlic and hazelnut broccoli



READY IN
15
MINUTES



COMPLETE MEAL KIT

Easy Step-by-Step, Recipe
& Portioned Ingredients



SERVES
2



“Eating Out In” with
The £10 Meal Deal
C\$17 Dinner for Two.
Food Retail Converges
With Food Service

“Eating Out In”: Ready to Cook and Consume Meal Kit UK Style

Snackified Eating

Traditional eating patterns built around three “square,” structured meals a day has given way to modern eating styles. 50% of all eating occasions are now snacks.



Increasing Protein in the Diet
is On-Trend and Meat Protein
Snacks are Fashionable



Chicken Snack from Moy park



Upmarket Jerky



FLAMINGO NUGGETS

Aus fein zerkleinertem Hähnchenfleisch

MIT CURRY-
UND SÜSS-
SAUER-DIP



Serviovorschlag




NUGGETS OHNE VERPACKUNG



UMLUFT 180°C (VORGEHEIZT)



15-17 MIN



😊 = LECKER!

(Nuggets: 400g,
1 x Curry-Dip: 22 ml/25 g,
2 x Süß-Sauer-Dip: 21,5 ml/25 g)

475ge



FOSTER FARMS INTRODUCES BOLD BITES: ON-THE-GO, HIGH-PROTEIN, FLAVOR-RICH CHICKEN SNACKS



On-Trend with the Adventurous Consumer





Grabits

less than 70 calories per pack

chicken stick
chinese
Ready to Eat

less than 70 calories per pack

chicken stick
original
Ready to Eat

less than 70 calories per pack

chicken stick
nice and spicy
Ready to Eat

GRABITS! PASTRIES AND PIES ARE TERRIFIED!!

- MOST SNACKS ARE HIGH IN FAT AND CALORIES – NOT GRABITS!!
- 100% REAL CHICKEN – LOW IN FAT / HIGH IN PROTEIN!!
- GRABITS GROWING BY A MASSIVE 54% IN 2016!!



Those Pesky Quorn Guys Again!





High Protein Meat Snacks with Fruit: Few, Simple Ingredients





We've just taken on a factory in the Scottish Highlands to launch our new Wild West Deli Salmon Jerky.



Competitor for Pork Crackling!



Sushi: Popular Throughout The World
Brilliant Snack/Mini-Meal But Not
Without Supply Chain Challenges.

Where are the Pork Meat Challengers?*



* Ham and Bacon are Doing Pretty Well!

The Number 1 Global Mega Consumer Trend is the Increasing Concern About The Health of the Family and The Health of the Planet. When Food Shopping, Drives Shoppers Towards “Mindful Choices”*



And a Widespread View that Big Food, Big Business, Big Government are Part of the Problem NOT Part of the Solution

**“I WANT TO EAT FOOD THAT’S GOOD FOR ME & MY FAMILY
AND THAT I FEEL GOOD ABOUT EATING”**

OECD Obesity League 2016

“It’s Big Food
and Big Soda
to Blame”!

What About
“Big Meat”?



Mexico's sugar tax leads to fall in consumption for second year running

Health experts are watching the progress of the tax to see if it will lower the rates of obesity-related diseases and type 2 diabetes



Watch Out for Increasing Government Regulation/Legislation to address the Global Obesity Crisis.

Pork Issues? High Fat Perception, Fried Meat Products, High Salt

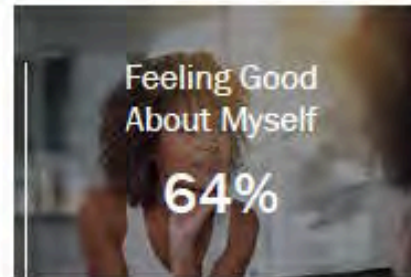
Sugar Taxes In The Americas: Brazil And Canada Most Likely To Follow Mexico's Lead



UK Sugar Tax Used to Finance Child Anti-Obesity Program

Food products will be tailored to personal priorities

Different lifestyle approaches to health and wellness...



... may lead to different personal nutrition needs and wants ...

Digestive Health
Energy / Fuel
Muscle Building
Performance

Weight Control
Hunger Control
Skin / Beauty
Anti-Aging

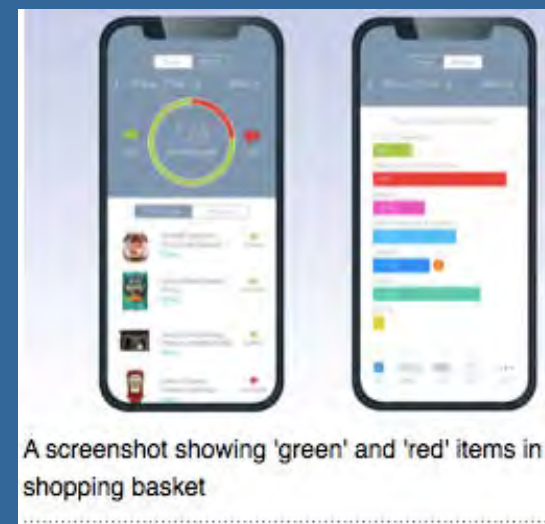
Purity
Digestive Health
Stress Reduction
Sleep Enhancement

Heart Health
Disease Prevention
Allergen Free
Immunity Building

... and different solutions



Professor Chris Tomazou's DNA Nudge device uses Smartphone technology to advise consumers whether particular food products are healthy for them or not.

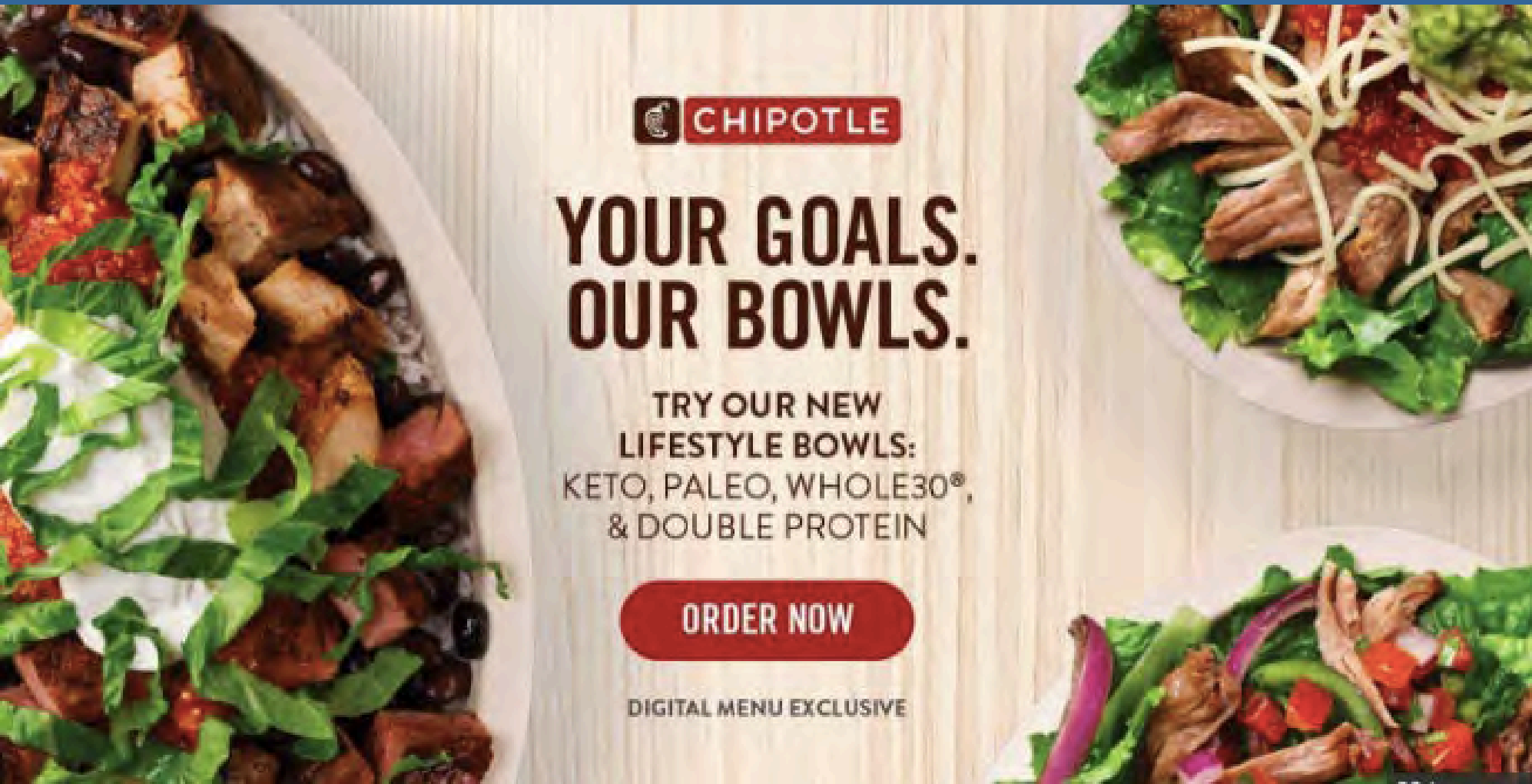



A screenshot showing 'green' and 'red' items in shopping basket

Chipotle adds 'Lifestyle Bowls' for paleo, keto, Whole30 dieters

January 2nd, 2019

Four new menu items tap popularity of trendy diet plans

An advertisement for Chipotle's Lifestyle Bowls. The background is a light wood-grain texture. On the left and right sides, there are images of three different bowls filled with various ingredients like chicken, steak, beans, rice, and vegetables. In the center, the Chipotle logo is at the top. Below it, the text "YOUR GOALS. OUR BOWLS." is written in large, bold, dark brown letters. Underneath that, in smaller dark brown letters, it says "TRY OUR NEW LIFESTYLE BOWLS: KETO, PALEO, WHOLE30®, & DOUBLE PROTEIN". At the bottom center, there is a red rounded rectangular button with the text "ORDER NOW" in white. Below the button, in small dark brown letters, it says "DIGITAL MENU EXCLUSIVE".

 **CHIPOTLE**

**YOUR GOALS.
OUR BOWLS.**

TRY OUR NEW
LIFESTYLE BOWLS:
KETO, PALEO, WHOLE30®,
& DOUBLE PROTEIN

ORDER NOW

DIGITAL MENU EXCLUSIVE



SOY SCORECARD

Assessing the use of responsible soy
in animal products

© WWF-Brasil / Sérgio Amaral

CHECK THE SCORES

ANALYSIS

RECOMMENDATIONS

WHY A SCORECARD?

METHODOLOGY

DO YOU REALLY KNOW WHAT'S BEHIND THE MEAT, EGGS AND CHEESE YOU EAT?

Most soy is grown in South America, where too often it comes at the expense of amazing natural ecosystems that are home to spectacular wildlife like jaguars and giant anteaters.

Take action!

for responsible soy

WWF has scored 133 companies on their use of responsible soy, grown without damaging the environment and harming people. The results show that many of these companies are doing far too little to protect irreplaceable habitats, wildlife, and people.

**Check out how
companies scored**



Social Pressures Dictating Choice Remind Me Again What We Can't Eat?:

- Anything with palm oil as an ingredient
- Livestock that's been fed soy from Brazil
- Shrimps caught by slave labour in Asia
- Beef that has destroyed the Amazon
- Anything with GMOs
- Anything in a non-recyclable pack
- etc.

The Australian pig farm benefitting from employing people with autism



PHOTO: Centaine Kaesler-Smith is one of many Australians on the autism spectrum who was unable to find work. (Supplied: SunPork Farms)

It is not easy for people on the autism spectrum to find work, but an Australian piggery is trying to change that.

SunPork Farms is part of an initiative called Autism and Agriculture which is aiming to develop career paths for people on the autism spectrum in animal care roles.

The “Blue Planet II Factor”

Suppliers, Retailers & Consumers
Will Change Radically Their Use of
Plastic Packaging



Dr. Food @ProfDavidHughes

The Domino Theory: Implications for
Plastic Packaging

supermarketsinyourpocket.com/2018/02/27/the...

**Milkmen are returning to London as
millennials order glass milk bottles in a
bid to slash plastic waste**

The catalyst for the surge in millennials using glass bottles is David Attenborough's Blue Planet II, according to one milkman.



You're right,
sugarcane plastic tubes are
a step in the right direction.



You'll find this logo on the back of our tubes. It means it has been made using at least 50% plastic from sugarcane, which comes from a renewable resource, responsibly grown in Brazil. For more information, visit bulldogskincare.com/sugarcane



Men Can be Concerned About:

- Their Looks
- and the State of the Environment!

Royal Mail: Stop posting crisp packets without envelopes

26 September 2018 358



Royal Mail has stepped into a row between campaigners and crisp makers Walkers - by urging people posting empty packets to put them in envelopes.

Campaigners asked people to post the non-recyclable plastic bags and "flood Walkers social media with pictures of us popping them in the post".

Royal Mail is obliged by law to deliver the bags to Walkers' freepost address.

But without envelopes they cannot go through machines and must be sorted by hand, causing delays.

PepsiCo UK Will be FORCED To Change Chip Packaging.

Initial Response, Within Days, Was to Establish Chip Package "Drop Off Points"



There's a New Marketing Mantra: Start Doubling Up on the Five Ps

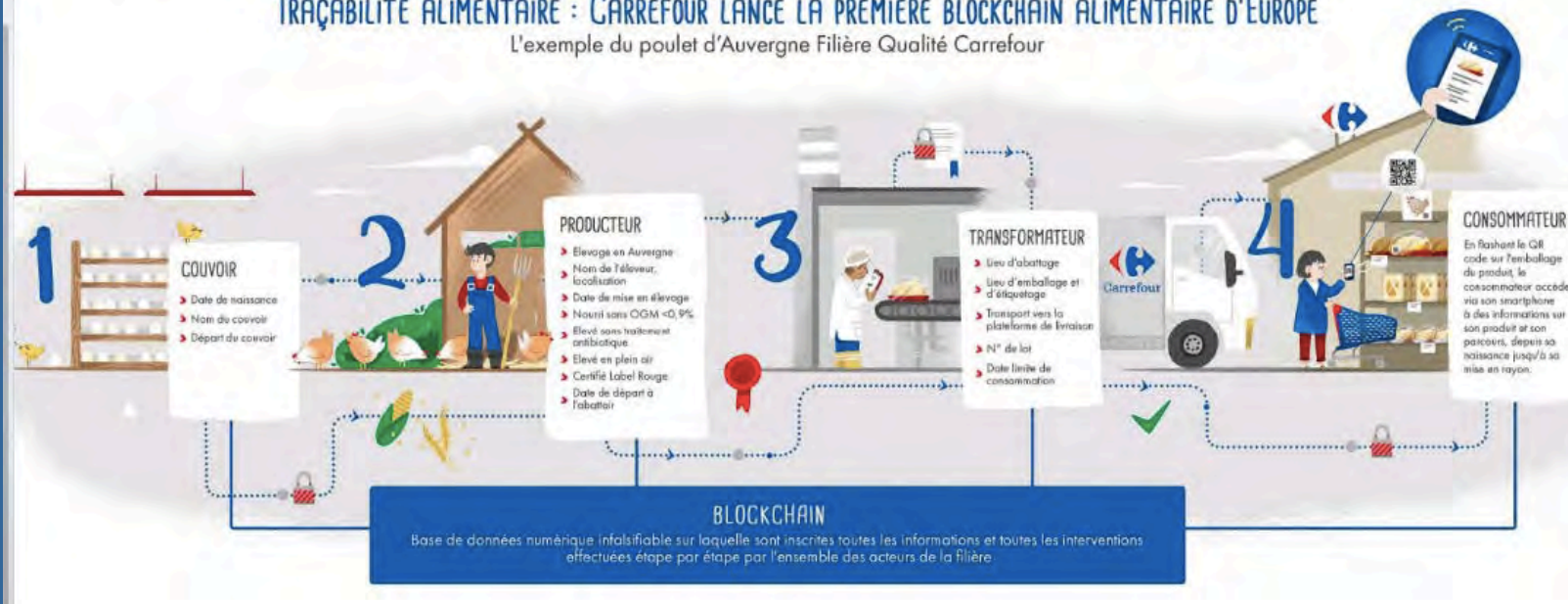
1. *Purpose*: Customers feel the company shares and advances their values.
2. *Pride*: Customers feel proud and inspired to use the company's products and services.
3. *Partnership*: Customers feel the company relates to and works well with them.
4. *Protection*: Customers feel secure when doing business with the company.
5. *Personalization*: Customers feel their experiences with the company are continuously tailored to their needs and priorities.

Walmart Is Getting Suppliers to Put Food on the Blockchain

Carrefour uses blockchain to create "transparent" chicken

TRAÇABILITÉ ALIMENTAIRE : CARREFOUR LANCE LA PREMIÈRE BLOCKCHAIN ALIMENTAIRE D'EUROPE

L'exemple du poulet d'Auvergne Filière Qualité Carrefour

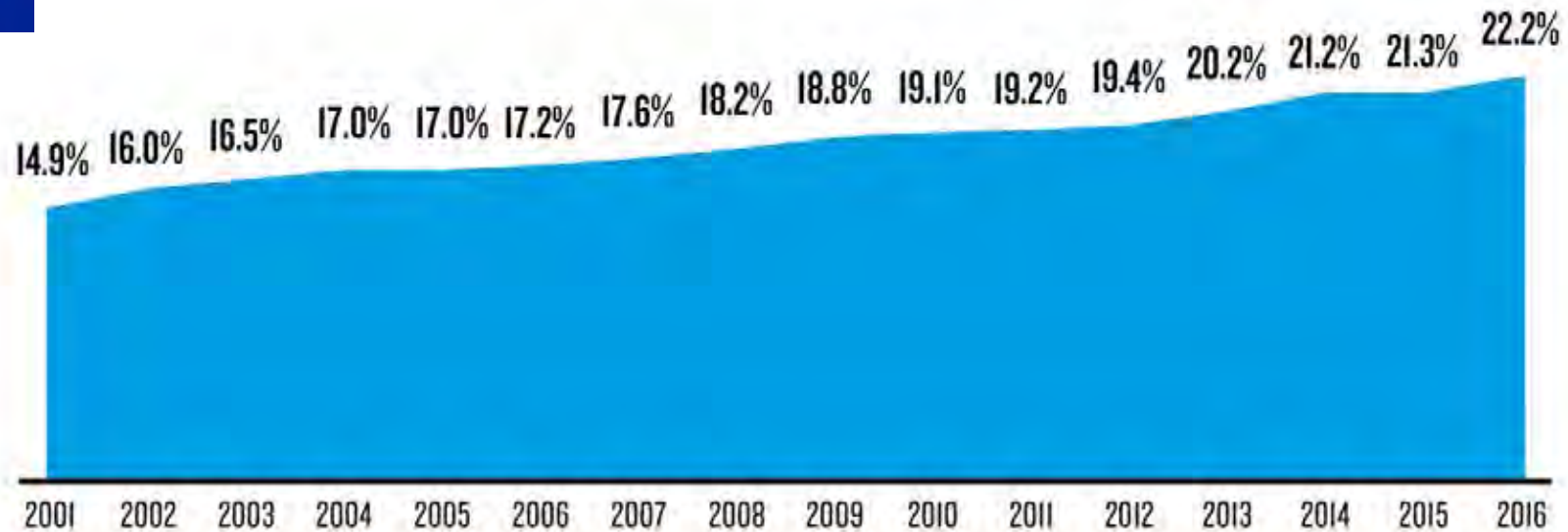


Blockchain technology: eHarvestHub plans to make traceability more lucrative for farmers

Is There a “Natural” Ceiling for Hard Discounters in ANY Market?



DISCOUNTER SALES IN EUROPE



Europe includes Austria, Belgium, Denmark, Finland, France, Germany, Greece, Italy, Ireland, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, United Kingdom, Hungary and Poland

Source: Nielsen Retail Measurement Services

More food in the mix at Dollar General

December 5th, 2018

**DOLLAR
GENERAL®**



More Competition for Traditional Supermarkets in USA



Who's Leading the Way in On-Line Grocery? Why? (and don't go to the USA for on-line leadership!)



BRIEF

BREAKING: Amazon to buy Whole Foods in \$13.7B deal

Purchase goes through August, 2017

China's E-Commerce Giants Buy Into Bricks & Mortar Supermarket Chains



ALIBABA GROUP'S HEMA SUPERMARKETS: THE REAL DEAL WITH CHINA'S 'NEW RETAIL'



Alibaba, New Hua Du supermarkets forming JV

October 9, 2017 Inside Retail Asia

Alibaba buys stake in Chinese hypermarket chain Sun Art





Kroger's recent deals highlight the growing importance of technology in food retail

May, 2018



Kroger Counters Amazon's Grocery Offensive With Ocado Deal

Kroger's driverless delivery test underscores a focus on the future



Kroger Buys Home Chef As The Meal Kit Industry Rapidly Consolidates

Tesco, Carrefour waste no time in trying to leverage power of partnership

August 7th, 2018



Fresh Meat Suppliers Are on Their List!

It's official. **Tesco** and **Carrefour** have joined forces, entering into a formal long-term, strategic alliance that is slated to become operational in October.

In an official release from Tesco, the alliance is said to cover the strategic relationship with global suppliers, the joint purchasing of own brand products and goods not for resale.

amazon go goes smaller



December 13th, 2018

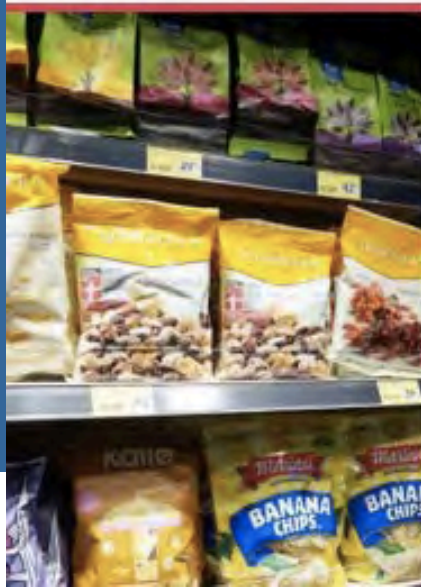


Dr. Food @ProfDavidHughes

Amazon Go mini convenience store being trialled in USA (42 sq.m. 1/4 size of Tesco Express). Pop stuff into basket & pay automatically on exit with Amazon App. Products? NO ingredients just breakfast/lunch/dinner/snacks. This format will fit nicely into any apartment/office block.



The Other Day, I was in an Outlet with a Huge Hot & Cold Beverage + Snack Offering





Healthy Food Offer



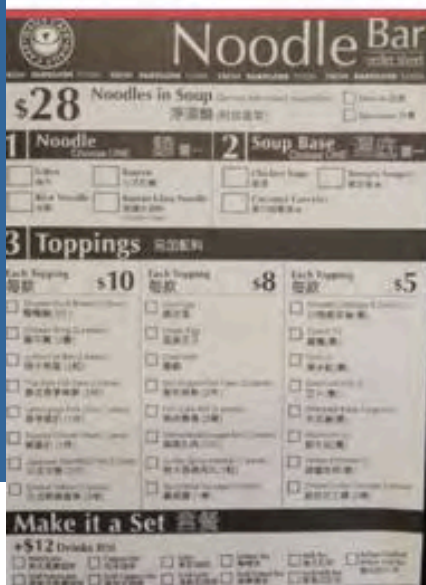


Asian and Western Food & Beverages



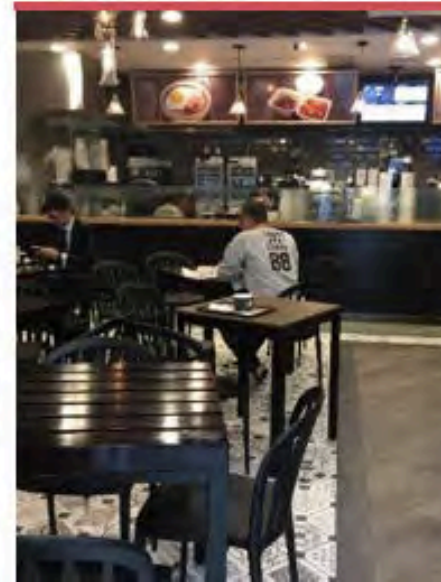


Noodle Bar

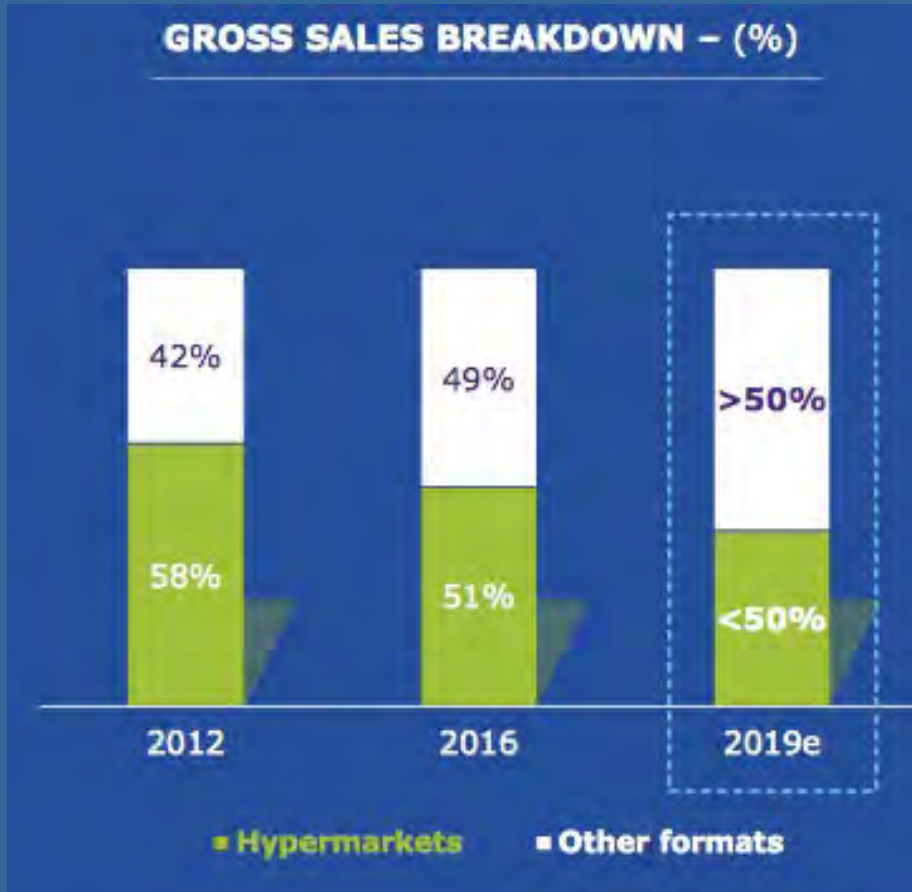




Hong Kong



For Major Supermarket Companies around the World: The Future is Omni-Channel. One Product Does Not Fit All Channels!

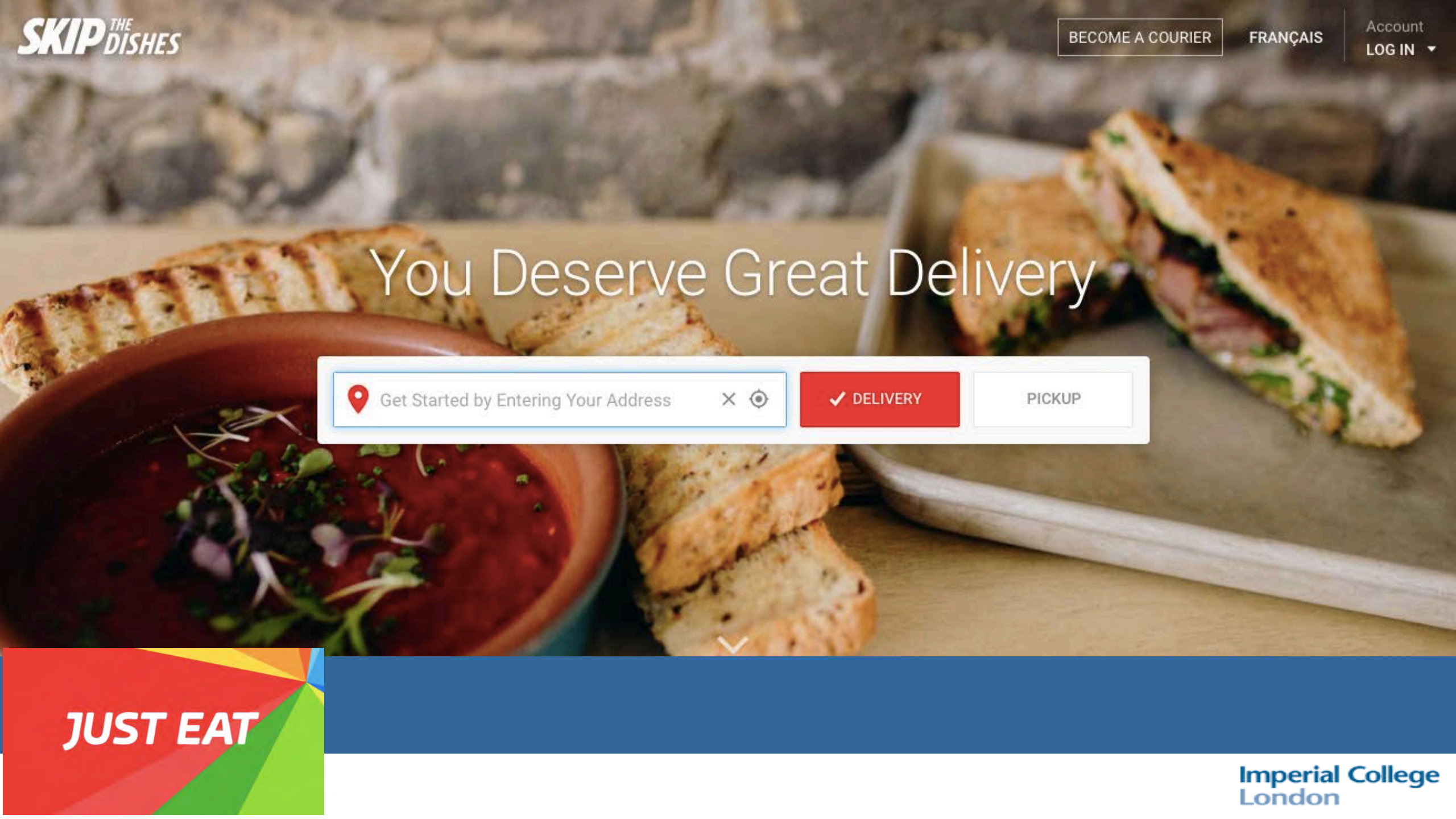


Restaurant delivery services are a growing challenge for supermarkets



Ordering Platforms and Meal Deliverers for the Global Restaurant Trade




It's a Dynamic Sector!



You Deserve Great Delivery

 Get Started by Entering Your Address ✕ 

 DELIVERY

PICKUP







Food-to-Go is a Huge Market in the UK (£25+ Bn.) Supermarkets are Important but Tertiary Players



Starbucks to Double Food Sales Globally by 2020



**“I’ll See You at Starbucks
for Breakfast/Lunch/Snack”**

**Starbucks launches Uber Eats
delivery in 100 Florida stores**

SANDWICHES & WRAPS

Our assortment of sandwiches and wraps are perfect for lunch or dinner.



Ham & Cheddar

Black Forest-style ham, Cheddar cheese, lettuce, tomato and ranch dressing served on a rustic bun.



BLT

Savoury bacon, tomato, lettuce and mayo served on a rustic bun.




Turkey Bacon Club

Carved seasoned turkey, savoury bacon, lettuce, and tomato, topped with mayo on a rustic bun.

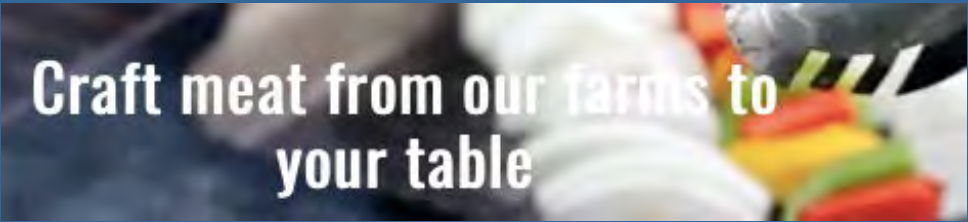


Meat Artisans and the Notion of Craft Meat



[Shop Now](#)

If you could only eat one pork cut for the rest of your life, what would it be?



Danone VC Arm Buys into Farmer's Fridge Franchise Vending Business in USA





Hillshire Farm expands vending options



Some Takeaway Points for The Canadian Pork Industry

- Global demand expanding for meat, particularly for chicken and fish and in emerging markets. Religious proclivities constrain pork consumption in some countries in Asia and Africa. Outlook in N&S America strong
- Per capita meat consumption static or declining in many ageing, higher income markets BUT some consumers willing to pay more for less meat
- Environmental, health and animal welfare concerns of consumers need addressing by the global meat industry. Traceability & Transparency is key
- Flexitarian diets have market traction in many countries
- The wave of vegetarian products being introduced are consumer-friendly. Meat industry needs to respond by being more consumer-facing
- More competitors in the world of protein but also more opportunities!



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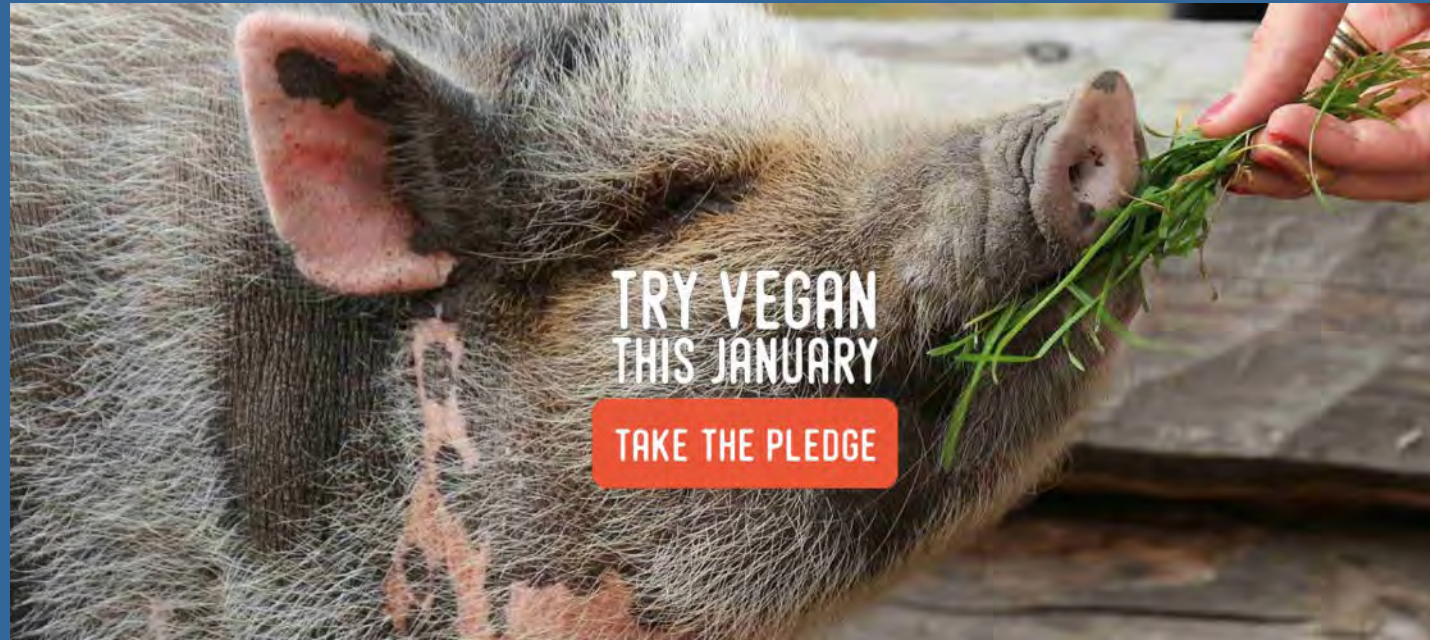
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MEAT DETOX RISE More young Brits are giving up bacon than booze this month as record numbers turn vegan, poll shows

Daily Mail January 2nd, 2019

Eight per cent of 16-24 year olds plan to follow a no meat or dairy diet for the month





New Vegan Range In “Blue Collar” Chain November 20th, 2018





Palm Oil High on Hit List of Environmentalists (and Nutritionists)

ICELAND TO BE THE UK'S FIRST MAJOR SUPERMARKET TO REMOVE PALM OIL FROM OWN LABEL FOOD

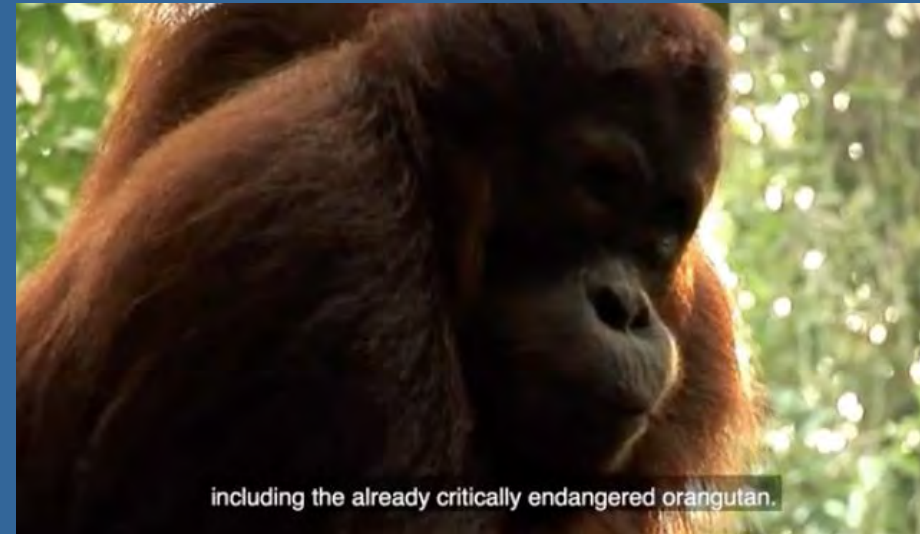
Collapse in orangutan population provides urgent need for action

Iceland

April 10th, 2018



October 18th, 2018



Propercorn unveils palm oil-free microwaveable popcorn

