Global Trends in Fruit Consumption and Marketing: Implications for RSA Table Grape Growers

Dr. David Hughes
Emeritus Professor of Food Marketing

Talks with RSA Table Grape Growers
Groblersdal, Republic of South Africa
August 13th, 2018

@prof david hughes
www.supermarketsinyourpocket.com
Heading for 10 Billion!
We’re Adding An Extra 2 Billion by 2050. But Where?

- Population of Africa to double from 1 to 2 billion
- India, Pakistan, Bangladesh to add 0.5 billion
- Europe will struggle to maintain current numbers and Russia, China, Japan and South Korea will decline in population
- NAFTA countries up by 100 million
- 1.6 billion of the extra 2 will embrace the Moslem or Hindu religions
- Economic growth will largely come from “Emerging Countries”
Asian emerging economies showing high growth rates, but some from a low base. Imported foods like grapes are discretionary purchases & VERY sensitive to economic downturns.

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# Economic Growth by Selected Regions

## Global Economic Growth

<table>
<thead>
<tr>
<th>Region</th>
<th>2015 (%)</th>
<th>2016 (%)</th>
<th>2017 (%)</th>
<th>2018 (%)</th>
<th>2019 (%)</th>
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<td>3.8</td>
<td>3.5</td>
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</table>

Source: HSBC Global Research (Global Economics, Q3 2018; European Economics, Q3 2018)
3 big growth engines and many small ones in global fruit imports

Fresh fruit and nut imports by selected countries (growth since 2010)

average annual import growth from 2010 (%)

Source: Rabobank based on UN Comtrade, 2013. Note: Circle size represents a country's total imports in 2016.
Who Are We Competing With in High Growth Asian Markets?

Major exporters of table grape to China 2016: volume share

- Chile: 47%
- Peru: 26%
- Australia: 14%
- USA: 8%
- South Africa: 4%
- Others: 1%

<table>
<thead>
<tr>
<th>Countries</th>
<th>Import volumes 2016 (tonnes)</th>
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<tr>
<td>Total</td>
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<td>20,147</td>
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<td>11,218</td>
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<td>Others</td>
<td>1,640</td>
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Major exporters of table grapes to Hong Kong 2016: volume share

- Chile: 42%
- Australia: 19%
- Peru: 18%
- USA: 13%
- South Africa: 6%
- Others: 2%

<table>
<thead>
<tr>
<th>Countries</th>
<th>Import volumes 2016 (tonnes)</th>
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<tbody>
<tr>
<td>Total</td>
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<td>Peru</td>
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<td>USA</td>
<td>29,842</td>
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<td>South Africa</td>
<td>14,793</td>
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<td>Others</td>
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</table>
Chinese imports dominate Thai market

Major exporters of table grape to Thailand 2016: volume share

<table>
<thead>
<tr>
<th>Countries</th>
<th>Import volumes 2016 (tonnes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
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<td>China</td>
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<td>Peru</td>
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<tr>
<td>Australia</td>
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<tr>
<td>USA</td>
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<td>Chile</td>
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<td>Others</td>
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</table>
Major exporters of table grape to Indonesia 2016: volume share

<table>
<thead>
<tr>
<th>Countries</th>
<th>Import volumes 2016 (tonnes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
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<td>China</td>
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<td>Australia</td>
<td>16,905</td>
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<tr>
<td>USA</td>
<td>13,869</td>
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<td>Peru</td>
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<td>Chile</td>
<td>4,347</td>
</tr>
<tr>
<td>Others</td>
<td>261</td>
</tr>
</tbody>
</table>
That’s ZAR 432/kg. RSP

Beijing Very Ordinary Supermarket
That’s ZAR34 per 125 grm. punnet i.e. ZAR272/kg. RSP

In Asia, In General, and China in Particular, Health Attributes of Food Products have Substantial Resonance with Consumers of All Ages
Dalian, North China  
August 9th, 2018  
ZAR20 per kg.  
Local Grapes at Consumer-Friendly Prices!
Dalian, North China

ZAR35 per kg.
August 9th, 2018
World's Most Expensive Grapes? Bunch Sells For $10,900 In Japan

Ruby Roman table grapes at a wholesale market in the central Japanese city of Kanazawa on July 7, 2016. The grapes sold for a record-high 1.1 million yen ($10,900) at an auction. Kyodo—Kyodo
Japan and South Korea have a long history of marketing Super Premium Produce at home and in export markets. Here’s SK grapes in an Upmarket Thai supermarket.
GRAPES FED GLOBE AUS

269

7/12

6864

THAILAND RSP: ZAR 108 per kg.
The Super Premium Gift Market for Food In Asia Sometimes Defies Understanding!

THAILAND RSP: ZAR 1800 per kg.
Gifting in China: The Importance of Premium Foods

- key signal of value of relationships
- gifting helps to secure future needs (reciprocity)
- gift-giving frequency & value increasing each year
- for “ordinary” urban folk, range NZ$100-400 per gift
- price and perceived quality hugely important
- food is seen as an ideal gift (great practicality and can indicate giving “health” to recipient)
- over 50% of gifts given in China are food
- imported foods have built-in gift appeal (may indicate greater respect and sincerity)
- Is RSA fresh produce on their “gift map”? Chinese NY is in your season!

Source: Mintel, 2016
Retail Theatre for Fresh Produce in Asia Often Much Better than in Most Stores In North America & Europe
Although, Sometimes the French have Fresh Produce Flair!
China’s fresh fruit imports have grown by 18 per cent a year since 2010

China’s fresh fruit and nut imports by country of origin

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

- Chengdu has TWICE the GDP (PPP) of NZ!
Development of Table Grape Industry in China

Professor Yulin Fang, Dean of College of Enology, Northwest A&F University
Cell phone: +86 15129652766
Email: fangyulin@nwafu.edu.cn
China’s level of digitalisation is enough to make Western online companies dribble with excitement. Payment by touch phone dominates and cash is passé. B2C e-commerce penetration in China far exceeds that in any other market in the world. Are the Chinese more tech-savvy? No – they’re leap-frogging traditional stores because of poor store networks and shocking product availability. For a US food producer, partnering with the top 4 grocers gives you access to half of the US food market. In China, by contrast, the top 4 grocers connect you with 5.7% of food retail spending (The Economist Intelligence Unit). This is a headache for food producers and consumers alike – supply chains are long, circuitous and, often, dodgy. So many Chinese consumers shop online because the products they want are not available offline and, as a bonus, they don’t have to sit in a horrendous traffic jam going to and from the store!

In China, Top 4 Grocers connect you with 5.7% of food retail spending (less than that for fruit, given the strength of the Wet Markets in most Chinese cities).
Who’s Leading the Way in On-Line Grocery? Why? (and don’t go to the USA for on-line leadership!)
Online fresh consumption on the rise

2016 fresh e-commerce penetration by shopper and by value

of fresh grocery spend

- Offline might lose share to online in certain categories, i.e. dry food and fruit
- Offline will require more exciting and unique offerings to face the challenge

1. % of total online fresh spend; 2. dry food includes rice, flour, dried mushroom, dried fungus, nuts etc.

Source: BCG China CCI fresh survey 2016, BCG analysis
Behemoths Astride the Chinese On-Line Market

Singles’ Day Sales, November 11th, 2017 (11/11)
JD.COM $19.1 bn.          TMALL.COM $25.3 bn.
Zespri: Best Practice in Branding & Marketing Fresh Produce

Zespri reveals recipe for success in China

KHN: E-commerce is increasingly important for us in China. For context, 20 per cent of our sales in China are done through e-commerce via platforms like Alibaba and Jingdong (JD.com). With e-commerce being so strong, we have also utilised digital to get closer to our consumers.

We focus on digital advertising and social media, such as WeChat and Weibo to deliver our campaigns to consumers and engage with them, to build a meaningful and distinct global brand.

Key Challenge
Growing market share in EU for grapes from S. Africa, Peru, Spain and Greece

EU grape imports by origin (2016)

- South Africa: 34%
- Chile: 20%
- Peru: 12%
- Egypt: 8%
- India: 7%
- Brazil: 5%
- Namibia: 3%
- Turkey: 4%
- Morocco: 1%
- Others: 6%

EU table grape production

Table grape availability in the EU: ca. 2.2 billion kg or 4.2 kg/capita

Other
Italy
France
Spain
Greece
Berries Rewarded with More Prime Shelf Space
Value Share of the UK Retail Fruit Bowl*. 2007 versus 2018

Retail Fruit Value 2007
£3,671 million

Winners:
- Berries
- Grapes

Av. Weekly HH Spend on Fruit £2.81

Losers:
- Bananas
- Apples

Retail Fruit Value 2018
£5,666 million

Av. Weekly HH Spend on Fruit £3.93

Source: Kantar Worldpanel UK. August 1- July 31

* Does not include retail value of cut fruit est. £400 million RSV 2017/18
Volume Share of the UK Retail Fruit Bowl. 2007 versus 2018

Retail Fruit Volume 2007
2,320,000 tonnes

Retail Fruit Volume 2018
2,600,633 tonnes

Winners:
- Bananas
- Berries

Losers:
- Apples
- Pears

Per Cap. Volume
2007 38.04 kgs.
2018 39.11 kgs.

Source: Kantar Worldpanel UK
The Rocketing Success of Blueberries: Examples from the USA and UK

**U.S. fresh blueberry imports, net production, and per capita use**

<table>
<thead>
<tr>
<th>Year</th>
<th>Imports</th>
<th>Net U.S. production*</th>
<th>Per capita use</th>
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<td>290</td>
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<td>2004</td>
<td>1300</td>
<td>300</td>
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<td>2006</td>
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<td>330</td>
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<td>1500</td>
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<td>1550</td>
<td>350</td>
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</tr>
<tr>
<td>2013</td>
<td>1750</td>
<td>390</td>
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</tr>
<tr>
<td>2014</td>
<td>1800</td>
<td>400</td>
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</tr>
<tr>
<td>2015</td>
<td>1850</td>
<td>410</td>
<td>1.95</td>
</tr>
<tr>
<td>2016</td>
<td>1900</td>
<td>420</td>
<td>2.00</td>
</tr>
</tbody>
</table>


**Driscoll's packages Justin Timberlake's 'braspberry' fruit**

**Dr. Food**
@ProfDavidHughes
UK per capita consumption of fresh blueberries increased tenfold between 2005 and 2017 (from 50 to 500 grms, p.c.) yet still 40% lower than in USA. Plenty upside to come: snackable, portable, yummy, health halo, increasingly affordable and seen as a year-around fruit.
Imitation is the Sincerest Form of Flattery!
Premium Retailers Expand Shelf Space for Premium Grapes!
### Percent Meals Eaten By

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Single diners</td>
<td>42</td>
</tr>
<tr>
<td>2 diners</td>
<td>36</td>
</tr>
<tr>
<td>3 diners</td>
<td>11</td>
</tr>
<tr>
<td>4 or more diners</td>
<td>11</td>
</tr>
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</table>

### Preparation Meal Time

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>2015</td>
<td>30 mins</td>
</tr>
<tr>
<td>1990</td>
<td>45 mins</td>
</tr>
<tr>
<td>1980</td>
<td>60 mins</td>
</tr>
<tr>
<td>1950</td>
<td>90 mins</td>
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</table>

### Willingness to Pay More for Food

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>5% more</td>
<td>For healthy</td>
</tr>
<tr>
<td>22% more</td>
<td>For better taste</td>
</tr>
<tr>
<td>Considerably more</td>
<td>For ready made meal solution!</td>
</tr>
</tbody>
</table>
Not Designed for 1 or 2 Person Households! Whereas Grapes Are Much More “Solo-Friendly”!
Time Starvation

More people are working, and working for longer hours, contributing to a sense of being time starved—especially among busy families and single-parent households.

In 60% of U.S. households, both adults work (up from 46% in 1979).

50% of parents say it is very/somewhat difficult to manage work and family.
Lunch for £3 (ZAR50)

How Low Can You Go?!:

• sandwich
• bag of fruit slices
• drink
• But where are the Grapes? Often, metres away in the Fresh Produce Dept. HOPELESS!
Food Products Presented By Meal or Snack Type NOT by Product Category
huge, everywhere in the world
Healthy snacking will become
Street Vendors and Market Stalls Selling Cut, Snack-Size Fresh Fruit Have Been Pervasively Available Across Asia for as Long as I Recall. Make Fruit Easy to Eat and Purchase, The Market Will Respond Anywhere! Westerners are Getting Better, BUT There’s Still a Long Way to Go!
In Siem Reap Traditional Market, It Took This Lady 20 Seconds to Trim and Present in Snack Form This Pineapple!
Snacking Apples and/or For Kids Lunch Boxes from New Zealand!
Easy Peel Citrus a Quintessential Healthy Snack BUT
Usually Located in the Fresh Produce Department
NOT in the Snack/Meal Deal/Grab & Go Sections
3 for 5 of Your 5+2-a-Day
Veggie Snack Maker Bare Foods

Uhhh, it looks a lot like real fruit but it’s just umm a lot more convenient!

For PepsiCo, the purchase of Bare Foods is its latest effort to diversify its food and beverage portfolio and move toward the more natural, less-processed foods that are now in favor by increasingly health-conscious consumers.

Beware of a wolf in sheeps clothing...
Bright Foods launches chilled fruit and veggie bars: ‘Our product is like the love child of a cold pressed juice and a bar’

"My whole philosophy is I want to make something that I want to eat and just because it hasn’t been done before doesn’t mean there’s not a way to do it,” Bright Foods founder and CEO says. Photo: Jennifer Chong.

Bright Foods has brought added innovation to the emerging refrigerated bar space with the recent launch of Bright Bars – chilled whole food bars made via high pressure processing (HPP) – available in select Whole Foods stores in Southern California.
Big FMCG Brands See “Fruitie” Snacks as Clear Market Opportunity. Direct Competition for Fresh produce.
“Big Soda” Desperate for Association with Healthy Beverages and have a Profound Knowledge of Consumer Trends & How to Harness Them. Now, Direct Competitors with Fresh and Processed Fruit and Vegetable Industry
PepsiCo to Launch Hello Goodness Healthy Vending Machines

Their Products Will be Right Next to the Water Cooler (Super Convenient)
Huge Opportunity for Fresh Grapes. Challenges:
- packaging format
- convenient location

Dried Fruit & Nuts
RMB44.2 bn. 2012
RMB88.1 bn. 2017

E-commerce platform Jingdong has a special section on 'imported foods'. The fruits/nuts range shows some of the regular suspects like Sun-maid and Ocean Spray from the US, as well as products from countries like Vietnam and Thailand.

Some are more expensive than domestic items but most seem quite affordable. The reason they do not pop up out as hot on in the Chinese media is they have paid too little attention to packing their products in the proper cultural wrapping.
Increased focus on health & product origin

"You are what you eat"

Fresher food through local sourcing & vertical integration
Same in Your Supermarkets
London mayor to ban junk food ads on tubes and buses

Sadiq Khan targets goods high in salt, fat and sugar to address ‘timebomb’ of child obesity
A Combination of Diet-Related Diseases and Ageing Population Placing Unprecedented Pressure on the NHS. Implosion Beckons! Political Suicide NOT to React NOW.

On Health Matters, Governments:
• ask consumers to improve diets/exercise
• then, ask industry to reduce fat/sugar/salt
• put pressure on retailers to “nudge” consumers
• threaten industry with regs. and taxation
• implement regs. and taxation (e.g. on sugar)

The UK government reportedly plans to announce stringent measures to combat unhealthy lifestyles within a matter of weeks and they may include a ban on promotional deals for junk foods.

Opposition parties have apparently backed the plans of Prime Minister Theresa May, The Times newspaper reported, quoting sources, who said the crackdown on tackling obesity in the UK may encompass prohibiting buy-one-get-one-free deals on unhealthy foods.

In Some Markets, Grapes Seen as a High Sugar Snack. There will be PRESSURE!
Grapes: Smoking Gun in the Increasingly Global Debate on the Obesity Crisis? High Sugar Products Firmly in the Firing Line

<table>
<thead>
<tr>
<th>Age</th>
<th>Maximum recommended sugar intake per day</th>
<th>Teaspoons</th>
</tr>
</thead>
<tbody>
<tr>
<td>4-6 yrs</td>
<td>18g</td>
<td>5</td>
</tr>
<tr>
<td>7-10 yrs</td>
<td>24g</td>
<td>6</td>
</tr>
<tr>
<td>From 11 yrs</td>
<td>30g</td>
<td>7</td>
</tr>
</tbody>
</table>

**Table Grapes**

Grapes are one of the first fruits that man ever cultivated. Chile is the top grower of table grapes in the southern hemisphere and the world.
Food Retailers Respond to Customer Concerns About Health
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

Mindful Choices” top food trend for 2018, Innova Market Insights, Nov. 2017
Natural and ethical claims on global new food and drink product launches are on the rise

**Natural product claims**
(i.e., no additives/preservatives, organic, GMO-free)
- SEPT. 2006-AUG. 2007 | 17%
- SEPT. 2016-AUG. 2017 | 29%

**Ethical and environmental claims**
(i.e., environmentally friendly packaging, animal/human welfare)
- SEPT. 2006-AUG. 2007 | 1%
- SEPT. 2016-AUG. 2017 | 22%

*Source: Mintel Global New Products Database (GNPD)*
The “Blue Planet II Factor”

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

EU proposes ban on straws and other single-use plastics

May 28th, 2018
Transparency at the core: Quinn Snacks tells consumers exactly where their ingredients originate

It’s one thing to read an ingredients label and know that a product contains sorghum.

It’s quite another to be able to meet the farmer who grew that sorghum with a few quick clicks. And when consumers eat Quinn pretzels, that’s an opportunity they get.
The Global Grocery World Entering a Disruptive Period

93 Years to build
610,000 rooms in 88 countries

4 Years to amass
650,000 rooms in 192 countries

Disruption
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
Report: Amazon and alternative formats will bring ‘carnage’ to supermarkets

- Retail space devoted to food sales in the US has hit a record high.
- New store growth is outweighing demand, and grocers are cutting prices to compete.
- Department stores followed the same strategy in the last decade, and now they are closing stores and filing for bankruptcy at staggering rates.

The retail apocalypse is heading straight for Kroger, Whole Foods, and Aldi

Inmar: Dim future for traditional supermarkets

Shares, stores to decline as fresh, limited assortment, e-commerce grow

The increasingly bleak outlook for Canadian grocery stores

It’s Only Going to Get Worse for America’s Grocers

Food Industry Analysts Predict Tough Times for Supermarkets

Imperial College London
Dr. Food @ProfDavidHughes
Lidl USA: this shopper communication ploy will raise eyebrows and hackles! Traditional supermarkets running scared.
"Super 6" Has A Significant Impact On Fresh Produce Buying Behaviour
That’s £0.69 (ZAR12) for a Premium Branded Pineapple
Now one in seven are buying their food online: Number doubles in two years as big supermarkets offer same-day delivery

- Total online grocery spending is predicted to rise by £1.2 billion this year
- The trend will continue over the next five years, reaching a massive £17 billion
- Tesco even recently tried out a robot that can deliver groceries in an hour
- Marks & Spencer are also planning same day delivery trials

ONLINE GROCERY CLICKS IN THE UK: SALES SET TO SURPASS £11 BILLION IN 2017

Kantar Worldpanel and Mintel, 2017
Walmart expands Uber delivery test to more cities
Kroger's driverless delivery test underscores a focus on the future
Grocery Delivery Options Proliferate in the UK
BREAKING: Amazon to buy Whole Foods in $13.7B deal

August 2017
Market Capitalization of Some Major Grocery Retailers (US$ bn)*

* as of August 8th, 2018

- $898 bn. (Amazon)
- $466 bn. (Alibaba Group)
- $268 bn. (Walmart)
- $99 bn. (Costco Wholesale)
- $29 bn. (Woolworths Australia)
- $34 bn. (Tesco)
- $14 bn. (Carrefour)

** Woolies Australia
FYI Woolworths RSA
Market Cap. approx. US$4 bn.
Asda-Sainsbury's merger: MPs fear squeeze on suppliers

Politicians call for watchdog to gauge affects of deal, saying it should not hurt suppliers

Sainsbury’s - Asda merge to fend off Germany’s £26bn supermarket superpower

UK supermarket shares slip as fears rise about effect of Amazon's move to slash prices at Whole Foods

Market Cap. Morrisons $8 bn.
Recent share price hike for M reflects analysts view that it may be an Amazon target (with small change!).
Tesco, Carrefour waste no time in trying to leverage power of partnership

August 7th, 2018

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.

Fresh Produce is on Their List!
Alibaba buys stake in Chinese hypermarket chain Sun Art
Alibaba is trying to reinvent China’s mom-and-pop stores

Ling Shou Tong
Free Retail-Management Platform Assists Store Owners with Selection & Range and Products Sourced via Alibaba
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

- Food delivery sales from companies like GrubHub and Uber Eats grew 51% between August and March, according to data from analytics firm Second Measure cited by Recode.

- GrubHub has the highest sales of any food delivery company in the U.S., but Uber Eats is coming on strong, and now leads in market share and customer spending in several major cities, according to Second Measure.

- DoorDash and Postmates recently discussed a merger, according to Recode. The combined companies would have a 24% market share in food delivery, making them bigger than Uber Eats but smaller than leader GrubHub.
Ordering Platforms and Meal Deliverers for the Global Restaurant Trade

It's a Dynamic Sector!

Australia is becoming an Uber Eats nation
How Deliveroo's 'dark kitchens' are catering from car parks

As appetite grows for upmarket takeaways, delivery service is setting restaurants up with satellite kitchens inside metal boxes.
Danone VC Arm Buys into Farmer’s Fridge Franchise Vending Business in USA
Younger Consumers Eat Out Most Frequently in the UK
Food-to-Go Accelerates the Convergence of Food Retail & Food Service

JAB Holdings Buys Majority Stake in Pret for £1.5 Billion May 29th, 2018
• 30+% of all US sales made using Starbucks app
• Virtually US ALL same store sales growth digital
• Globally planning to double food business by 2021
• Particular expansion of premium food and drink lines
• Expanding Bistro Boxes and Reserve Cafés (20% y-o-y growth 2016/18)
• Focus on cold drinks (50% of drink sales 2017/18)
• Market leader in cold brewed coffee in USA
• China expansion: 800 cafés in 2013 to 3200 end of 2018
• 1st Reserve Roastery opened in Shanghai Dec. 2017
• Opening a new café in China every 15 hours! Currently, 600 in Shanghai

Source: Starbucks, March 20th, 2018
Simply Delicious
REAL FOOD

Soup of the day with Croissant
Soup of the day with Croissant
Soup of the day with Croissant

Imperial College
London
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
“In Asia, the convenience sector is by far the sector that is growing the most—7-Eleven in Taiwan or in Thailand, that’s where we are most likely to see innovation happening.”

Peter Gale - Managing Director Retailer Services, Asia-Pacific, Nielsen

How Well Represented are Grapes in Convenience Stores?
What’s Your Point of Difference Versus Other Grape Suppliers?

• Cleaner and Greener?
• Safer?
• Cheaper (why would you want to be?!)?
• Tastier?
• Better Quality?
• Better Availability?
• Earlier/Later than Competitors?
• More Interesting Range/Selection?
• Proprietary Ownership of Grape Varieties?
Origin Green is Ireland’s food and drink sustainability programme, uniting government, the private sector and food producers through Bord Bia, the Irish Food Board.
How Do You Communicate Value for Money?

Two Coffees £5: Routine Daily Purchase
“I’d Buy More Fruit but it’s Expensive”!

Av. Weekly Household Spend on Fruit £3.93
CONTACT POINTS:

e-mail: profdavidhughes@aol.com

Telephone contact:

mobile  +44(0)7798 558276

@ProfDavidHughes

Retail Blog: www.supermarketsinyourpocket.com