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# Welcome to the World TOUR

Find out more about the parts of the world where SIAL Network is established, thanks to the Euromonitor's study.

SELECT A REGION TO SEE THE REPORT

Canada

China

Indonesia

Middle East & Africa

Philippines

# CANADA

# Canada

## Retail market size, in US$ billion

**43 US$**

Canada is the world's 12th largest packaged food market, still ahead of India in 2015.

## Retail CAGR (real) fixed US$

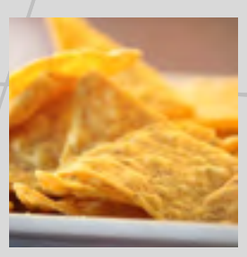
**1%** Historic 2010-2015

**2%** Forecast 2015-2020

## Retail market size, in US $billion

**15** Staples

**11** Dairy



**9** Snacks

**8** Meals

## Share of Modern Grocery

**80%**

Canada's retail network is very developed and packaged food is predominantly bought in supermarkets and hypermarkets, yet discounters are on the rise.

# Canada

## MARKET SHARE
### Top food players in 2015

| | |
|---|---|
| Saputo | 5.4% |
| Kraft Heinz | 4.4% |
| AGROPUR Dairy Cooperative | 4.2% |
| Groupe Lactalis | 3.7% |

# Canada

## KEY TRENDS

### ETHNIC INFLUENCES

- Multinational nature of the country and immigration policy.
- Reflected in federal election.
- Provides inspiration for new product development such as Kefir and broghies.

### MILLENNIALS

- Need for Health: Natural, Organic, Free-from, no GMO.
- Need for Convenience: Snacking, On the Go, Packaging.

### WEAKER CURRENCY

- Rising ingredient costs.
- Slowdown in premium brands.
- Value for money and rise of discounters.

# Canada

## FASTEST GROWING CATEGORY
### % CAGR growth 2010 - 2015

### Savoury Snacks 4.3%

The snacking trend is strong amongst the younger generation who value the convenience of snacks than traditional meals.

### Oils and Fats 4.0%

There is a trend towards more unconventional oils, such as coconut oil and palm oil.

### Rice, Pasta and Noodles 3.8%

The influence of Indian, Chinese and Japanese cuisine has created more market opportunities.

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# CHINA

# China

## Retail market size, in US$ billion

**245 US$**

China represents 11% of global sales in 2015 and will contribute to over a third of global sales growth over 2015-2020.

## Retail CAGR (real) fixed US$

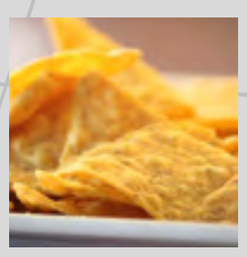
**8%** Historic 2010-2015

**7%** Forecast 2015-2020

## Retail market size, in US $billion

**76** Staples

**86** Dairy



**51** Snacks

**33** Meals

## Share of Modern Grocery

**59%**

Internet retailing went up from 0.3% share in 2010 to 5% in 2015 and will continue to take sales away from modern and traditional retailing.

# China

## TOP PACKAGED FOOD COMPANIES IN 2015

| | |
|---|---|
| 伊利 | 5.8% |
| 蒙牛 | 5.6% |
| Nestlé | 3.7% |
| wilmar | 2.9% |

China

# KEY TRENDS IN BEIJING

## CHINA SLOWDOWN

- Consumer spending hampered by macroeconomic slowdown.
- Shifting demographics: an ageing economy.
- Lifting of the one child policy.

## RAPID URBANISATION AND RETAIL DEVELOPMENT

- Urban population soared from 42% of the total in 2000 to almost 70% by 2030.
- Consumers gaining access to a wider product range.

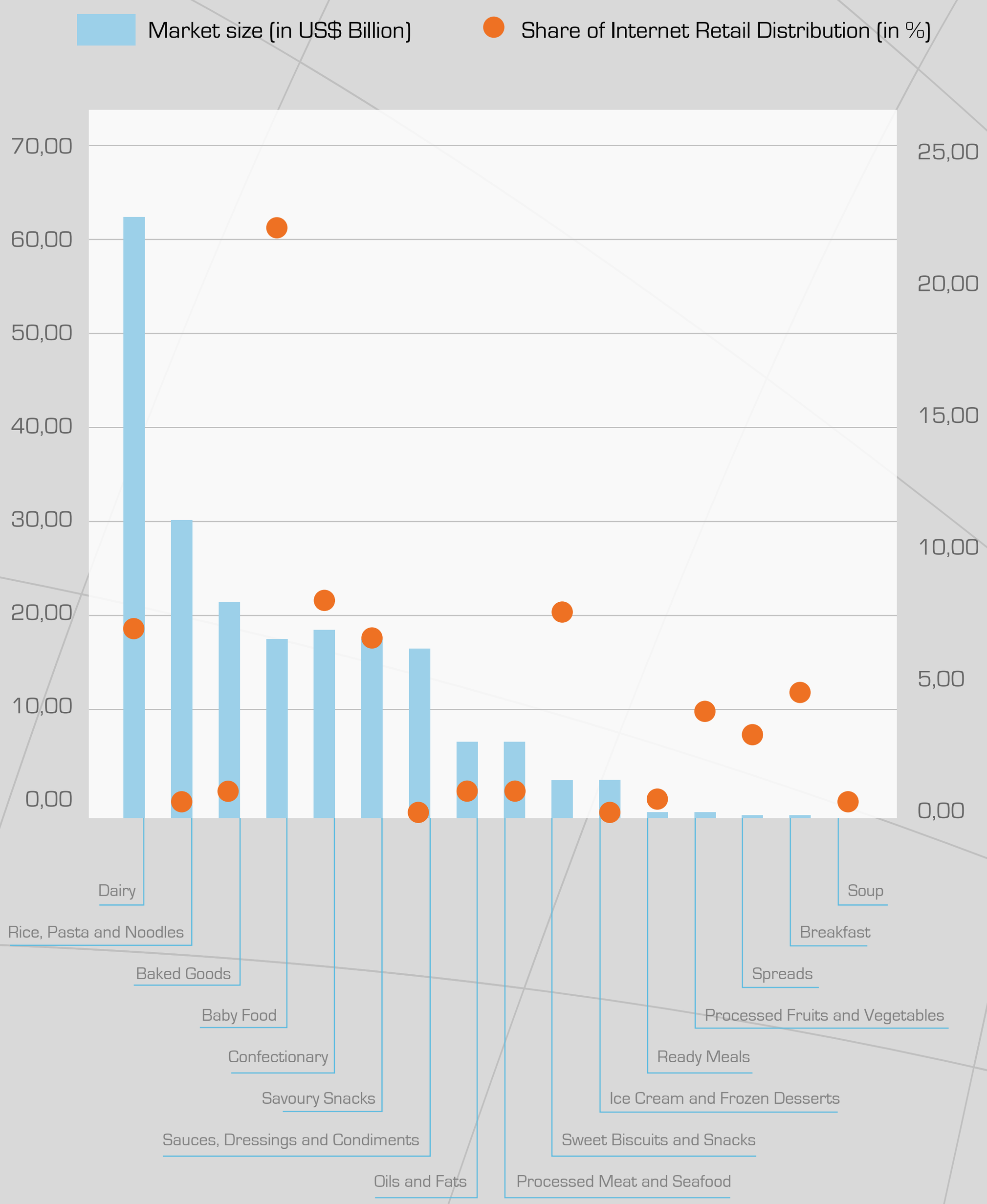
## TIGHTER LEGISLATION AS A RESULT OF FOOD SCARES

- Baby food most impacted and will be most favourable to multinationals.
- Foreign brands gain quality status amongst consumers.
- Health brands thrive.

# China

## ONLINE SALES PROVING A VITAL CHANNEL FOR BABY FOOD AND DAIRY

### China: How Important Internet Retailing is in 2015



# China

## FASTEST GROWING CATEGORY
### % CAGR growth 2010 - 2015

### Baby Food 18.9%

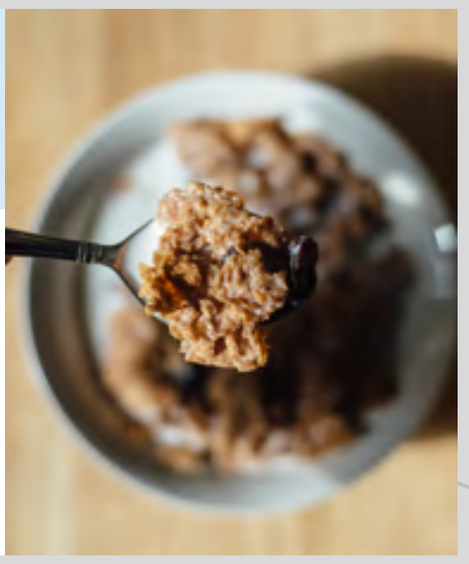
The purchase of baby food abroad maintains a strong influence on sales of powder milk formula in China due to booming outbound travel.

### Baked Goods 13.7%

In China, cream is much more widely used in the foodservice industry, especially in specialist dessert outlets.

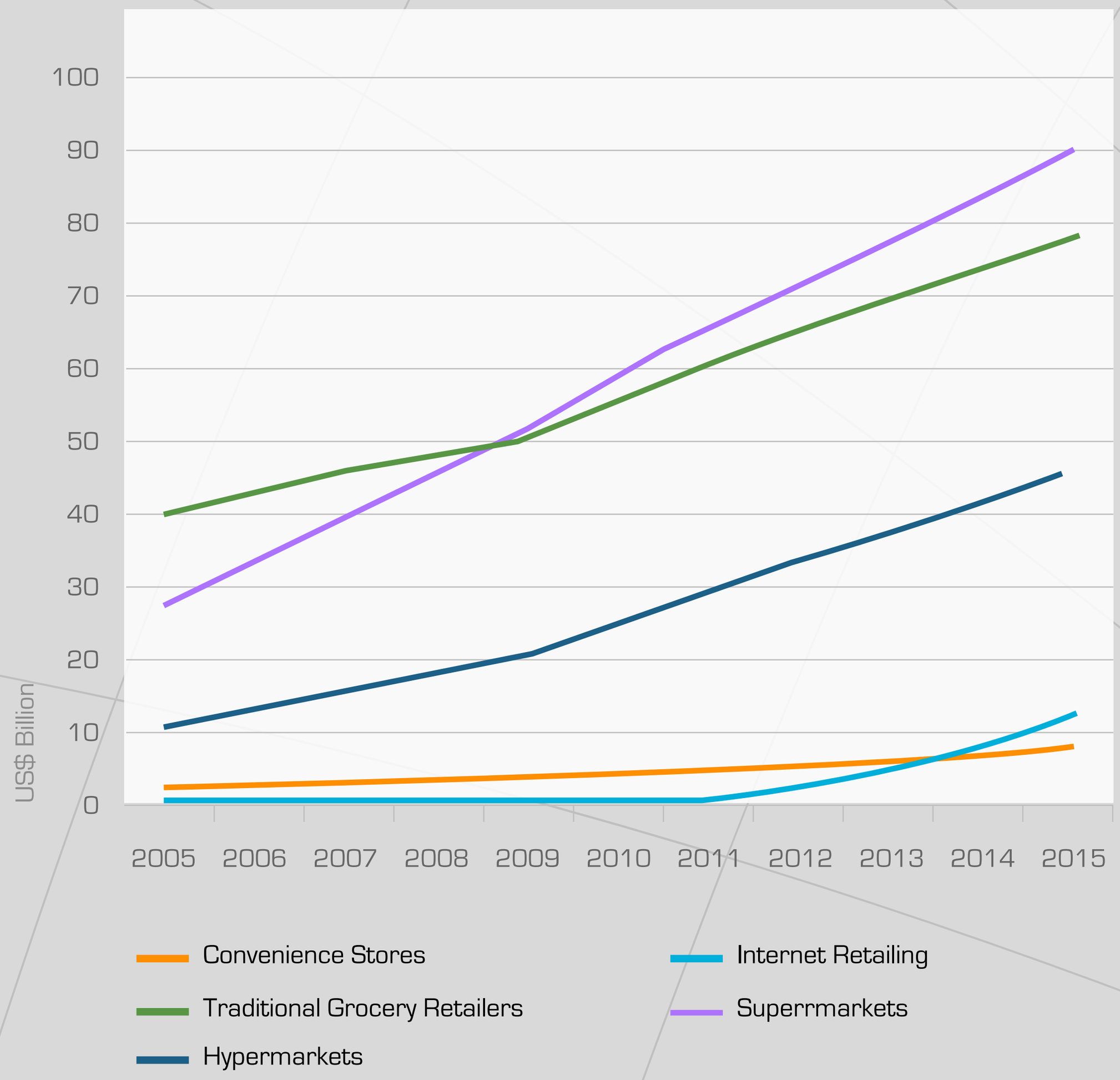
### Breakfast Cereals 13.5%

Accelerated pace of life drives growing demand for instant foods.



# China

## CHINESE CONSUMERS CHANGING WHERE THEY BUY THEIR FOOD FROM



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# INDONESIA

# Indonesia

## Retail market size, in US$ billion

**24 US$**

Indonesia makes up 4% of total Asia Pacific packaged food sales and has been growing ahead of the region over the past five years. Staple accounts for the biggest share of stomach. Half of staple sales come from rice.

## Retail CAGR (real) fixed US$

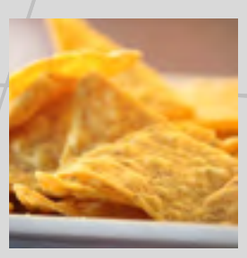
**7%**
Historic 2010-2015

**6%**
Forecast 2015-2020

## Retail market size, in US $billion

**12** Staples

**5** Dairy



**5** Snacks

**2** Meals

## Share of Modern Grocery

**36%**

Modern grocery is still in its infancy. Traditional retailers, in particular independent local shops are key to driving value in the Indonesian market.

# Indonesia

## MARKET SHARE
### Top food players in 2015

| | |
|---|---|
| Indofood | 10.1% |
| Nestlé | 4.2% |
| Danone | 3.8% |
| FrieslandCampina | 3.5% |

# Indonesia

## KEY TRENDS

### VOLUME GROWTH STAYS RESPECTABLE ALBEIT DECELERATING

Improvements in consumer knowledge and understanding of products in packaged food.

### MODERN GROCERY RETAILERS HELPS TO BOOST SALES

Convenience stores chains such as Indomaret, Alfamart and Circle K even expanding into Indonesia's smaller cities.

### PACKAGED FOOD IS SET TO POST RESPECTABLE GROWTH

The industry has the potential to become increasingly competitive between the 2015 – 2020 period.

# Indonesia

## FASTEST GROWING CATEGORY
### % CAGR growth 2010 - 2015

### Processed Meat and Seafood 17.9%

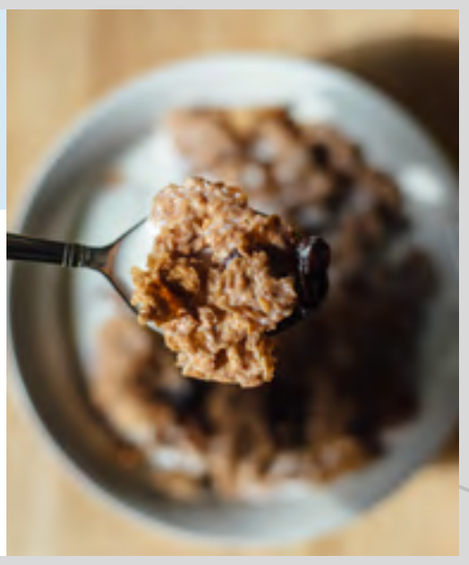
Processed meat and seafood sees strong growth partly thanks to the rapid expansion of modern retailers.

### Ice Cream and Frozen Desserts 17.4%

Large investments in new launches and promotions help fuel volume growth.

### Breakfast Cereals 16.6%

The rising popularity of Western culture and growing health consciousness drive growth.



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# MIDDLE EAST & AFRICA

# Middle East & Africa

## Retail market size, in US$ billion

**140 US$**

Middle East accounts for 6% of global packaged food sales and has shown a faster growth.
Turkey and Iran are the biggest markets with over US$ 30 billion sales each. Iran is the market to watch out for.

## Retail CAGR (real) fixed US$

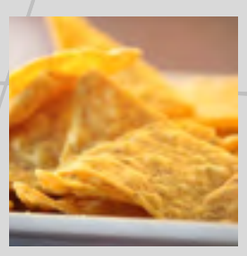
**3%**
Historic
2010-2015

**5%**
Forecast
2015-2020

## Retail market size, in US $billion

**58** Staples

**38** Dairy



**27** Snacks

**18** Meals

## Share of Modern Grocery

**36%**

Modern grocery channel is relatively underdeveloped, consumers still purchase the majority of their food from traditional shops and bazaars.

# Middle East & Africa

## MARKET SHARE
### Top food players in 2015

| | |
|---|---|
| Nestlé | 3.8% |
| DANONE | 2.4% |
| SolicoGroup Food Industries | 2.0% |
| Mondelēz International | 1.7% |

# Middle East & Africa

## KEY TRENDS

### A MOVE AWAY FROM UNPACKAGED FOOD

- Health: Safety, improved nutrition.
- Affordability: Growing retail penetration, different pack sizes, lower prices.

### REMOVAL OF BREAD SUBSIDIES

- Value: Financially difficult to sustain.
- Lifestyle: Switch to modern retail and growing importance of foodservice.

### EVOLVING DEMOGRAPHIC BASE

- Lifestyle: Modern traditional family, urbanisation, malls.
- Convenience: shelf-stability, on-the-go, snacking, packaging.

# Middle East & Africa

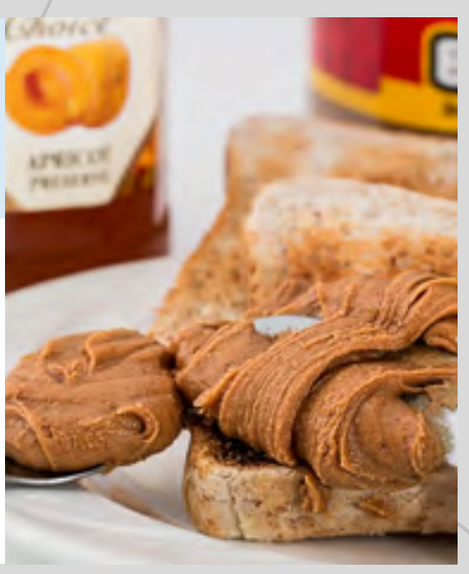
## FASTEST GROWING CATEGORY
### % CAGR growth 2010 - 2015

**Ready Meals 19.1%**

Consumption of ready meals increased substantially among working couples.

**Spreads 17.9%**

Ferrero remained the leading player within spreads in 2015.



**Ice Cream and Frozen Deserts 16.7%**

Demand for ice cream as a refreshing treat in summer is much smaller than in many other countries.

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# PHILIPPINES

# Philippines

## Retail market size, in US$ billion

**11 US$**

The Philippines accounts for 2% of total Asia Pacific food sales but growth has been lagging behind the region.
Cooking ingredients and meals, in particular vegetable and seed oils are a very important part of consumers diet and so are savoury snacks.

## Retail CAGR (real) fixed US$

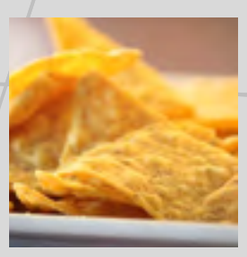
**2%**
Historic 2010-2015

**3%**
Forecast 2015-2020

## Retail market size, in US $billion

**4** Staples

**3** Dairy



**3** Snacks

**2** Meals

## Share of Modern Grocery

**53%**

Modern grocery keeps stealing share from traditional grocery driven by growing consolidation and store expansion.

# Philippines

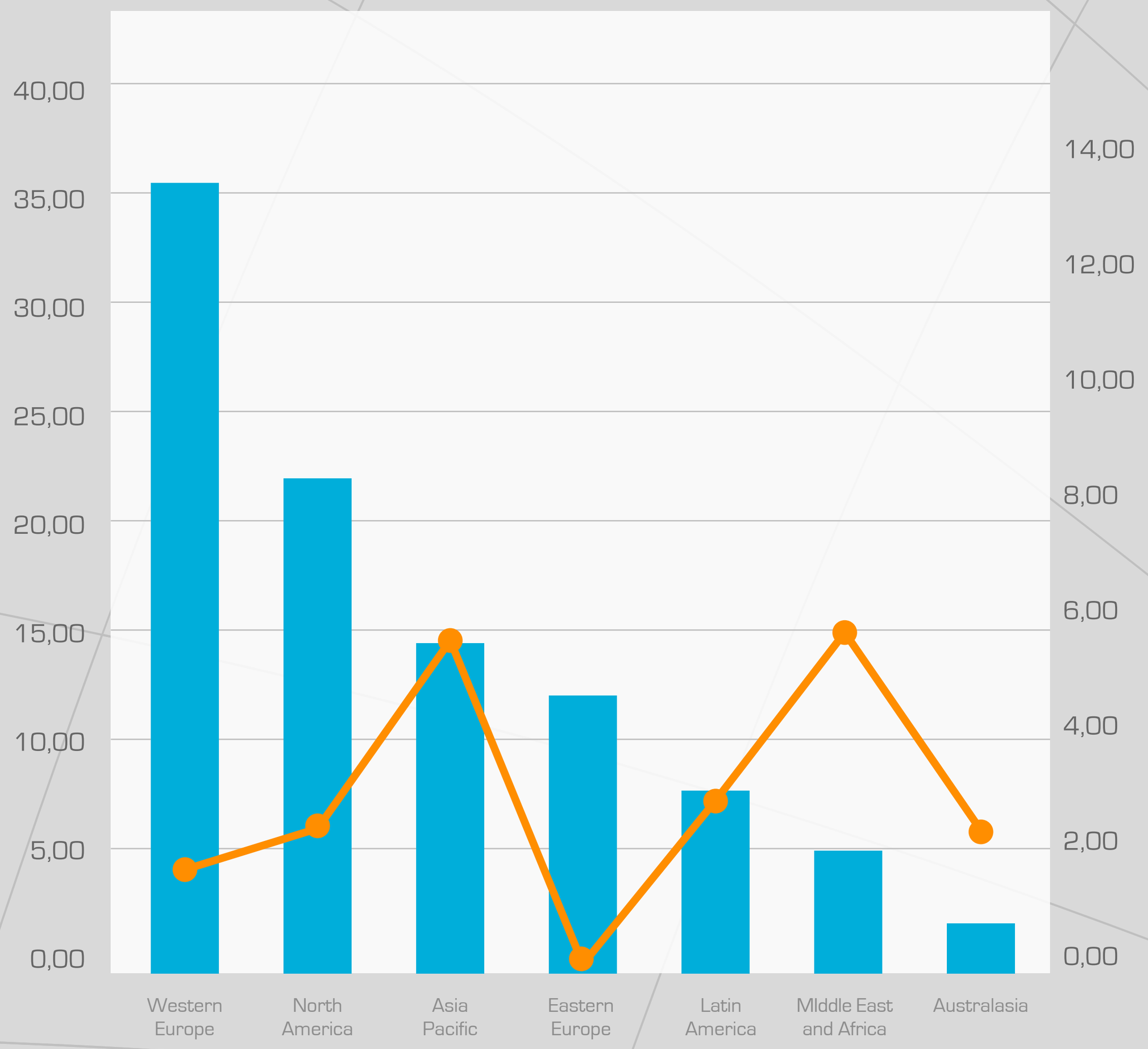
## MARKET SHARE
### Top food players in 2015

| | |
|---|---|
| Nestlé | 9.6% |
| JG SUMMIT HOLDINGS, INC. | 9.0% |
| SAN MIGUEL CORPORATION | 7.6% |
| Monde Nissin CORPORATION | 5.5% |

# Philippines

## STRONG FORECAST FROM DEVELOPING REGIONS

### Market size: Chocolate Confectionery



# Philippines

## KEY TRENDS

### EXPANSION OF THE MIDDLE CLASS

- Government assisting low income families.
- Remittances from overseas.
- Rising demand in foreign brands and specialist food.

### PREMIUMISATION

- Packaging and flavour: Gold packaging, local and exotic flavours, more meat.
- Health: Superfruits, BFY products, natural ingredients, Gluten-free cookies, high-fibre chips.

### CHILDREN AS A TARGET AUDIENCE

- 25% of population< 14 yrs.
- Parents are more willing to spend on children.
- Better access to media and internet facilitates growth.

# Philippines

## FASTEST GROWING CATEGORY
### % CAGR growth 2010 - 2015

### Savoury Snacks 5.8%

Companies, are geared towards using healthier raw material inputs rather than making changes to their manufacturing processes.

### Ready Meals 4.1%

Ready meals and foodservice are popular meal options among busy individuals.

### Sweet Snacks 3.9%

Growing consumer desire for healthy food choices, is mainly addressed by companies through fortification.