

ARGENTINA

By Sergio OTERO, *Actualidad en supermercados*

RETAIL TRENDS

Rather than highlighting a new concept, it would be more relevant to highlight the transformation of an already existing concept in Argentina: **the “cash-and-carry markets”, also known as “wholesale markets”**, which used to be suppliers for traditional businesses and professionals exclusively, have now adapted their business proposal, services and layout to offer a new purchasing experience concept and target consumers directly. In Argentina, wholesale or cash-and-carry stores have a market share of approximately 10%, being one of the few sales channels that grew in 2015, along with the “hard discounts” one, led by the supermarket chain Dia. **Wholesale markets have overtaken hypermarkets** in terms of customers’ purchase size.

CONSUMER TRENDS

Argentinean consumers try to make the most of their budget **and look for the best cost-benefit ratio**: they found this in wholesale markets and hard discounts. Consumers make fewer shopping trips, and buy more every time they visit the market. This trend started 5 years ago and intensified in 2015, thanks to ongoing hard discounts and sales. The bond between retail markets and consumers should be attributed to constant discounts and deals and not innovation and value.

TREND 1: PRICE WAR

Good positioning in the price war is essential for the food industry today in Argentina. Under these conditions, food brands tend to develop more functional and valuable products. By granting customers safety, trust, functionality and competitive prices, these top brands offer more for the same price. Price reduction was the most prevalent strategy in the retail trade, as shown by the big discounts that prevailed throughout the year.

NESQUIK CEREAL INSTANTANEOUS

Brand: Nestlé Argentina

Launch date: 11/2015

Category: Grocery

Family: Chocolate Products

General description:

Nesquik Cereal Instantaneous is a powdered cocoa and sugar-based food with added cereal. It combines the traditional Nesquik cocoa powder with instant cereal. Nesquik Cereal is a soluble powder prepared by simply mixing it with milk; the cereal added to the formula, which is an essential part of a balanced breakfast, is unperceived when drinking.





Why is this product a success? Nesquik Cereal Instantaneous belongs to a very strong brand's product range. By adding cereal to its formula, as a new nutritious ingredient, it has opened a new segment in the chocolate powder market.

TREND 2: PROMOTING MARKET ZONES

Natural, healthy, tasty and modern products for all ages allow for differential pricing. Their healthy and innovative qualities invigorate sectors and categories. They also help create new business opportunities. Some leading national brands introduced innovative and healthier products in categories which had remained practically unchanged for a long time. Global trends in the food industry are replicated in Argentina: sustainable, environmentally friendly, more practical and affordable products available for all sales channels.

TERMA LIMONADA

Brand: Grupo Cepas

Launch date: 12/2014

Category: Beverages

Family: Bottled Waters



General description: Terma is a classic brand belonging to the Cepas Company, but it's actually more than that. It's a brand that created a very different soft drink many years ago: a soft drink that started off as a water soluble concentrate which stood out for being natural, for its herbal blend, and which is consumed by all Argentinians in their forties.

Under this brand's umbrella, the company sought to reach a new consumer segment by developing a new product: ready-to-drink Terma Lemonade.



Why is this product a success? The product is a commercial success and very innovative for the Argentinean market, meeting its launch objectives by:

1. Capturing a new consumer segment
2. Achieving different consumption time frames
3. Penetrating new commercial distribution channels

TREND 3: GLOBALIZATION

Global trends in the food industry are replicated in Argentina: sustainable, environmentally friendly, more practical and affordable products available for all sales channels. Traditional packaging and containers give way to new trends aimed at making packaging more practical while retaining the same quality, so that products can be used, kept, and reused without losing their characteristics.



TORO VIEJO BAG IN BOX

Brand: Federación de Cooperativas Vitivinícolas Argentina

Launch date: 07/2015

Category: Beverages

Family: Alcoholic Beverages, Appetizers

General description: Toro Viejo Bag in Box 3000ml is quality wine supplied in a practical packaging solution that makes daily consumption and product preservation easier. Until 2014, wine in Argentina was exclusively supplied in bottles. Today, keeping up with global trends, the Bag in Box system was launched to guarantee easy dispensing and longer preservation of the product's qualities.



Why is this product a success? The BIB system is more economical, highly practical and creates new consumption habits.

NEW RETAIL CONCEPT

Speaking of new concepts in Argentina, it is important to highlight the transformation that Carrefour is beginning to bring about in some of its stores, turning them into Gourmet Market stores. These stores have already been introduced in other countries, but the concept of **having gourmet supermarkets is new to Argentina**. This concept mainly focuses on perishable food and offers features typical of traditional businesses in the store, such as self-service but also staff-assisted options in the meat section.

OTHER MAJOR RETAILERS

DIA is the only supermarket chain that implements "hard discounts" in Argentina. This is not a new mechanism in the local market, it has been there for many years and today, like in the rest of the world, it is changing its image and offers. However, it has been one of the few channels or formats that expanded during 2015: hypermarkets are losing market share, while supermarkets are maintaining their sales flow, the gap is shrinking and hard-discount supermarkets, such as DIA, have increased their market share.

DO NOT MISS

There are three stores you must visit in Argentina:

Jumbo Unicenter: it belongs to the Chilean company Cencosud and was opened in 1988.

Coto Tortugas Mall: it belongs to the Argentinean company Coto and was opened in 2010.

Carrefour Gourmet Market Monroe: it was reopened recently, and it is the first store of the chain to invest in adapting different stores to this concept.



AUSTRALIA

By Lorna GLORIA, *Retail World*

RETAIL TRENDS

Supermarket chains **Coles** and **Woolworths** continue to compete head-to-head. Coles continues its positive momentum in sales with an increase in comparable food and liquor store sales in its 2016 third quarter sales. Woolworths reported a decline in sales for the 2016 first half-yearly results and is undergoing significant changes in the business and leadership, and is also exiting the home improvement business.

Coles and Woolworths continue to open new and refurbished stores in their latest formats. Both retailers have opened a number of **express stores in metro areas offering smaller format stores with convenience offers.**

ALDI and **Costco** are expanding their footprint and opening stores in South Australia and Western Australia. ALDI remains competitive with brands offering quality private label products.

CONSUMER TRENDS

Online grocery shopping is on the rise. Consumers are still looking for **fresh and local products** for home cooking. **They are also looking for diversity, quality and innovation** - products that cater to their specific needs, quality authentic products, and healthy products that offer functional benefits to assist in their active lifestyles.

TREND 1: HEALTH

Leading a healthy lifestyle continues to be a strong trend in Australia as consumers are increasingly aware of their health, well-being and consumption habits. This is evident in the availability of alternate options and high quality products launching on the market such as gluten free, sugar free (or lower sugar/salt content), low fat, and so forth. There is also an increasing demand for high protein foods for consumers looking for functional benefits to aid in their active lifestyles and diet.

BODIE'z PROTEIN WATER

Brand: BODIE'z Protein Water

Launch date: 04/2015

Category: Beverages

Family: Bottled Waters



General description: BODIE'z Clear Protein Water is an Australian breakthrough that is set to revolutionize the protein drinks category nationally and internationally.

This ready-to-drink, Clear Protein Water comes in various 500 ml formulations, one with 20 grams of Whey Protein Isolate (WPI) and Guarana for pre-workout and two 30 gram WPI flavors for post-





workout recovery. Both are packed with a scientifically tailored vitamin and electrolyte mix.

Why is this product a success? The key to the success of the product has been that Bodie Lazar has been able to create a truly innovative alternative to other protein supplements, in a format that has a great mouth and stomach feel, is refreshing and tastes great.

TREND 2: CONVENIENCE

Consumers are always looking for convenience products to help make their busy lives a little bit easier. This can come through any number of formats such as ease of use and practicality, pack format, and on the go options. With plenty of sugary soft drinks and energy drinks available on the market, packaged fresh beverages offer convenience and a healthier alternative. These fresh beverages can also offer diverse uses such as a pre-workout option or to be blended in shakes.

H2COCOESPRESSO

Brand: H2Coco

Launch date: 04/2015

Category: Beverages

Family: Bottled Waters

General description: H2Coco continues to broaden its range in line with increasing demand, offering coconut water in various sizes, in addition to a recently launched coconut oil. To broaden the penetration of coconut water, in April H2Coco introduced Cocospresso, offering a combination of premium coconut water with a full shot of espresso. This innovative new product is the perfect example of exploring trends – coffee and coconut water – and bringing them together to cater to consumer demand.



Why is this product a success? H2Coco claims coconut water is growing at more than 150 per cent in the grocery sector, driven by strong consumer demand and supported by strong brand activity, national merchandising, increasing shelf space and regular promotions.

TREND 3: PREMIUMIZATION

Premiumization is a trend that is relevant to most categories. The ice-cream category has traditionally been known to be quite stagnant in the past. However in recent years, consumers' taste profiles have diversified and manufacturers have delivered on products that show that even a previously tired frozen category can be revitalized by premium, gourmet and luxurious products that adults can indulge in.



BAILEYS ICE CREAM

Brand: Bulla Dairy Foods and Diageo

Launch date: 08/2015

Category: Frozen products

Family: Ice-creams

Sub-family: Individual ice-creams and sorbets

General description: The unmistakable taste of Baileys Original Irish Cream liqueur has now been immortalized in the freezer with a premium collection of Baileys Ice Cream, signifying the beginning of a successful business partnership with Bulla Dairy Foods and Diageo.

Australia's Bulla Dairy Foods has collaborated with the world's leading premium drinks company, Diageo, and its Baileys brand, to craft a luxurious and velvety range of ice creams in Original, Burnt Toffee and Chocolate flavors.



Why is this product a success? Baileys Original Irish Cream is the number one liqueur brand in the world. This range captures Baileys iconic flavor in ice-cream, bringing it to Australian and New Zealand palates for the first time, as a decadent, indulgent adults-only range.

NEW RETAIL CONCEPT

Coles and Woolworths - dark stores (online distribution centers) cater to growing online shoppers. Click & collect - order online, pick up item at a nominated store. Self-serve checkouts are a fixture.

DO NOT MISS

Coles Broadway, Sydney NSW - concept store, café, Mix clothing range.

Ritchies Mt Eliza, Victoria - fine food and wine, premium deli and bakery offer, La Maison Maille Boutique, energy efficient green store.

Fairview Park Foodland IGA, South Australia - state-of-the-art supermarket reflects European influences. 3,300sqm store, local and imported goods, market fresh seafood, premium butcher and bakehouse, cheese bar, quality fresh food.

IGA Marketplace Greenslopes, Queensland - sustainable initiatives and technology, quality gourmet deli, fresh produce, butchery and florist, bakery, organic, gluten free and fine food.

Woolworths Crows Nest, Sydney NSW – part of a \$52 million investment, fresh fruit & vegetables, butcher, delicatessen, fresh sushi bar, Woolworths Macro range (free range, free-from, organic choices) inspiring meals ideas, wide choice of healthy options, and dedicated Thomas Dux (gourmet & fine food) aisle.



AUSTRIA

By Stephan Pirker, Mag. CASH

RETAIL HIGHLIGHTS

The main retail trends in Austria are: the combination of brick and mortar business with online trade, the union **of food trade with gastronomy**, growing market concentration after the bankruptcy of the food retailer "Zielpunkt", and the expansion of opening hours.

CONSUMER HIGHLIGHTS

The current trends for consumers are: the expansion of fresh, ready-to-eat convenience products, the increase in self-check-out counters and **digitalization** (mobile phone payments, electronic shelf labeling, iBeacon), the labeling of **origin**, regionality.

TREND 1: REGIONALITY

The improvement of production technology gives rise to more natural products.

ÖLZ MILK ROLLS

Brand: Ölz

Launch date: 06/2015

Category: Grocery

Family: Bread making

General description: Ölz Milk Rolls are the first yeast dough pastries in Europe not made of milk powder but of fresh milk from the Austrian Alps. Therefore they are very soft and fluffy. The company invested 22 Million Euros in a new plant to improve its milk rolls.



Why is this product a success? The fine and tender yeast dough pastries can be eaten at once and therefore are particularly suitable as breakfast or break snack. They are practical because they come in a reusable bag. Ölz uses only natural materials of local origin.

TREND 2: SUPERFOODS

A single product fulfills several dietary needs.

NÖM FASTEN PROTEIN DRINK

Brand: NÖM

Launch date: 03/2015

Category: Grocery

Family: Milk

General description: One drink (250 g) contains 25 g of protein.

This is equivalent to 50 percent of the human dietary requirement for protein. The drink is based on concentrated skimmed milk with a fat rate of only 0.1-0.2 percent. The NÖM fasten Protein Drink is available in 4 flavors: vanilla, chocolate, cappuccino and banana.





Why is this product a success? The NÖM fasten Protein Drink is a source of protein of high quality and helps to keep fit. The drink is made from ultra high temperature milk (UHT milk) and can therefore be stored unchilled.

TREND 3: NEW TECHNOLOGIES

Fresh regional ingredients gain more and more importance.

RAUCH JUICE BAR

Brand: Rauch

Launch date: 04/2015

Category: Fresh products

Family: Other non-dairy fresh produce

General description: Rauch Juice Bar is a range of cold pressed fruits and vegetables juices. The fresh juice bottles are submerged in a high pressured water tank (6,000 bar), thus eliminating all bacteria but preserving taste, color, vitamins and nutrients. The juice is not heated and does not contain additives.



Why is this product a success? The 5 varieties of the juice were developed in the Rauch Juice Bar in Vienna. They are very creative, e. g. orange & coriander; pineapple, spinach & chili or red beet & basil. Now these juices are also available in stores nationwide.

NEW RETAIL CONCEPT

Producers market their products directly to consumers via their online stores.

OTHER MAJOR RETAILERS

Hausbrot.at: This Company delivers not only newspapers but also breakfast to your door every morning.

DO NOT MISS

Merkur Hoher Markt in Vienna: A premium food store in downtown Vienna covering three floors. It is the flagship store of the retail chain Merkur that opened in 2012.

Interspar Sillpark in Innsbruck: This is a hypermarket located in the shopping-center Sillpark. It re-opened after a big refurbishment in October 2015.

Meinl am Graben in Vienna: Another premium food store in downtown Vienna also hosting gastronomy. It is a very traditional store, opened in 1950, with a long history.



BELGIUM

By Christophe SANCY, *Gondola*

RETAIL TRENDS

Main event: the merger between the Dutch group Ahold and the Belgian group Delhaize. The priority is probably to reinforce their respective positions on the US market. But it's also a momentum for the Belgian market, where Delhaize is ranked 2nd, and where Ahold's Albert Heijn arrived recently (Flanders only), being the first brand to successfully challenge the market leader Colruyt on price perception. This deal raises a lot of questions about future positioning and procurement policies.

CONSUMER TRENDS

The Belgian FMCG market has been rather dull. More than a price war, there's a strong promotional pressure: promo sales make up 22% of major store sales. Manufacturers try to compensate declining sales volumes with aggressive promotions ("2 + 1" or "buy 1, get 1 free"), which fail to increase sales and destroy value. The Belgian consumer, a lot more "promo-sensitive" than the global average, is conditioned to be even more opportunistic. Focus on innovation would be a better value driver than short-term tactics.

TREND 1: CHANNEL BLURRING

Food retail and food service used to be distinct entities. It's no longer the case. When it comes to lunch or take away meals, convenience stores and fast/smart food outlets are competitors. Some new store concepts do include on-site consumption facilities. Finally, retail buyers and category managers are keeping a closer watch on the hippest restaurant & foodies trends. It doesn't take long before you find similar products on the shelf.

BUTCHER'S BURGER

Brand: Delhaize

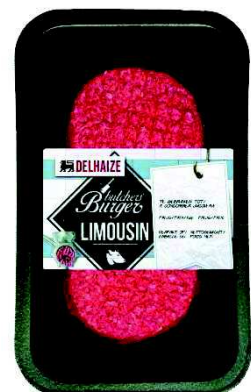
Launch date: 06/2015

Category: Fresh products

Family: Meat Delicatessen, poultry



General description: "Gourmet Burger" has been a major trend among foodies, and lots of hip restaurants have successfully developed the concept, far removed from the fast food standard. Delhaize immediately translates the food service trend into a unique retail product: a real gourmet burger you can prepare yourself at home, offering a taste and quality no restaurant can match! The secret? Premium beef breeds, exclusive sourcing, perfect grain, thicker burgers. Simply perfect, a true 10/10!



WORLD TOUR 2016



Why is this product a success? A culinary bomb and an instant hit! Despite being pricier than ordinary burgers, volume sales reached impressive figures. A wonderful product, the right thing to do in a meat market depressed by price pressure and desperately in need of value!

TREND 2: HYPERLOCAL / “MADE HERE”

Local sourcing is positively perceived by the consumer for its positive impact on authenticity, employment and sustainable supply chain. It is actively promoted by most retailers. Paradoxically, it's a retailer brand operating hypermarkets which developed the most ambitious and generous policy towards small local suppliers. The “Made Here” (in store) claim is also gaining traction, as it offers the shop opportunities to differentiate itself, prove its expertise, and provide an experience for the shopper.

CHAMBOURLETTE

Brand: Carrefour

Launch date: 12/2015

Category: Beverages

Family: Beers / Ciders

General description: Local sourcing is hot in Belgian retail. But what can be more local than a product made in the store itself? The (amazing) new hypermarket concept revealed by Carrefour in the city of Mons is the only store in the world, with Eataly Chicago, to have its own brewery. The difference is that Carrefour is a mass market store. The brewery is not a fake scenery, customers can see the real production happening, supervised by master brewers of the Silly brewery (an excellent artisanal producer).



Why is this product a success? It's both a product and a retailer's statement: this shop is totally dedicated to the local community. It provides a great experience to shoppers. Mons was one of the few Belgian cities which had no local beer. And the beer itself is excellent!

TREND 3: REDUCING FOOD WASTE & ADAPTING TO HOUSEHOLD SIZE

Retailers are genuinely dedicated to improving their ecological performance. Large investments are made to reduce their carbon footprint. A lot of progress has been made on supply chain & store equipment. The main challenge remains food wastage. Campaigns are developed to educate customers. On the other hand, retailers have to adapt their offer to a changing sociological pattern, wherein the classical concept of “family” or “household” has changed a lot since the emergence of the supermarket.

WORLD TOUR 2016



#SO Fresh

Brand: CARREFOUR

Launch date: 09/2015

General description: Retailers have been targeting families with kids for long. But demography & sociological structure have changed a lot since the sixties. A lot of people live alone. They complain about the portions they find in their store, too large for their needs. It generates food wastage. Carrefour launched a range of 25 different packaged fresh vegetables, ready to cook. Formats vary from 175 to 300 g. Permanent promotions: Buy 2 vegetables get the 3rd free.



Why is this product a success? It certainly does illustrate the will to provide adapted portions and minimize the food wastage single consumers were complaining about. But it does of course also play on others main trends: healthy food, natural, convenience.

NEW RETAIL CONCEPT

- **Carrefour Mons Les Grands Prés** : "The hypermarket is not dead, as long as it has the capacity to reinvent itself". While the non-food area is totally transformed, the (central) food part is also quite impressive. "Made Here": the shop makes its own chocolate, brews its own beer... No physical barrier between the shop & the surrounding shopping mall.

- **Cafeterias**: Intelligent use of digital display (order & pay for heavy stuff at the entrance, collect it at the drive zone).

DO NOT MISS

Carrefour, Mons Les Grands Prés: A new definition of the hypermarket mission & experience.

Louis Delhaize, Wilrijk. Louis Delhaize (without CAPS, not to be confused with Delhaize, a different group), presents its new concept, combining modernity with the warm touch of the local grocer. Cosy furniture like at home, and a radical choice for small shops: all the fresh items are grouped in a single cold room.

Färm, Auderghem (Brussels). Already three stores for this nice & young organic retail brand.



BRAZIL

By Marlucy LUKIANOCENKO, *SuperHiper Abras*

RETAIL TRENDS

In 2015, it is important to highlight the opening of the first Eataly store in São Paulo. In addition, there has been an **expansion of small gourmet stores** such as Minuto Pão de Açúcar and **cash and carry stores**, which are known in Brazil as “atacarejo”, such as Assaí (from Grupo Pão de Açúcar) and Atacadão (from Carrefour) and others.

CONSUMER TRENDS

Consumers have become more rational because of the crisis in Brazil (inflation and rise in unemployment). Therefore, since last year, **consumers are focused on “grabbing” the best cost/benefit ratio offered by the market**. Thus, the focus is on basic and low price products and cash and carry stores have been quite visible. Furthermore, the consumers have been on the lookout for this solution because they want to cater to other demands as well such as **easy cooking, healthy, fresh and gourmet products**.

TREND 1: NATURAL, FRESH AND HEALTHY

The concept of “health food store” is expanding. In this kind of store, at least 50% of the sales area is dedicated to fresh food (vegetables and fruits). This strategy is in response to consumer needs. Supermarkets, at large, have tried to expand areas devoted to functional products and specific necessities. They have increased the offer of gluten, lactose and cholesterol free products.

TIROLEZ ZERO LACTOSE

Brand: Tirolez

Launch date: 07/2015

Category: Fresh Products

Family: Cheeses



General description: The range of products is made up of several kinds of lactose free cheese including mozzarella, cottage cheese and Minas Frescal. Lactose is a disaccharide sugar derived from galactose and glucose that is found in milk. They are also trans-fat-free. Cheese without the lactose manufacturing process is very similar to traditional cheese. A natural enzyme is added to break two kinds of sugar. The taste is similar to the conventional version of cheese.



Why is this product a success? There is a substantial number of people with lactose intolerance in Brazil. According to the Brazilian Federation of Gastroenterology, 40% of the population has some restrictions. It is the single product line of cheese with this attribute in the country.



TREND 2: CONVENIENCE

A few years ago, the driver of consumption was convenience and it still is, and even more so. Big retail companies have been focusing on convenience stores or small gourmet stores. These kind of stores offer products to meet consumers' demands because they don't have any time to lose.

FRIBOI TODO DIA

Brand: JBS Group

Launch date: 01/2015

Category: Frozen products

Family: Savory Frozen products

General description: Convenience and variety: this is the concept behind the line of products Friboi Todo Dia (Friboi Everyday), made up of 14 chilled or frozen beef recipes ready for consumption. Beef stroganoff, rib with sauce, beef strips with onion are some of the options. You only need to put them in the microwave or oven. The recipes are roasted or grilled. The manufacturing involves a thermal process with high temperature to sterilize, preserve properties and guarantee a long shelf life (10 months) for the products



Why is this product a success? Time is precious and every minute counts. Friboi Todo Dia helps consumers with a very busy lifestyle to have a healthy dinner. It is a success because, after a test phase conducted in São Paulo, the line of products is now available for purchase at other locations.

TREND 3: PRICE WAR

The strategy used by cash and carry, "atacarejo", is remarkable. They offer low price and large economical packaging. Consumers at large (especially families) buy in this kind of stores. But these stores also sell to small businesses such as neighboring stores or restaurants and bars. Some cash and carry stores sell 20% more than other kinds of stores.

KELLOGG'S GRANOLA

Brand: Kellogg's

Launch date: 11/2015

Category: Grocery

Family: Cereals

General description: This product is an extension of traditional muesli in three options: vanilla, apple and chia, cocoa and chia. Salvia hispanica, commonly known as chia, is a species of flowering plants. Some researches indicate potential health benefits from consuming chia seeds including reducing weight. The most innovative aspect of this product is the packaging. The company replaced the cardboard box with a stand up pouch to reduce the price. The packaging is also bigger and there is a price indication.





Why is this product a success? In addition to being a functional and healthy food, the new packaging meets the demand for a lower price. The consumer can save 26% of money compared with four small packages, which contain the same amount of muesli. It's a good example of products sold in cash and carry stores.

NEW RETAIL CONCEPT

Eataly (Italian Brand) is a new concept introduced in Brazil. Brazilian retail had already been introduced to the concept of supermarkets with restaurants. However, the idea behind Eataly is very different. It is a brand-new concept for Brazilians consumers. At the same place, they can eat and buy products. This new concept provides an innovative experience.

OTHER MAJOR RETAILERS

The concept of "atacarejo" (cash and carry stores) is very interesting. Their product assortment focuses on food. They offer low prices and large economical packaging. Others kinds of retail highlights are "health food stores" and big "gourmet bakeries". This kind of retail offers everything from coffee, meals, wine, etc. They also offer frozen ready meals to be eaten at home.

DO NOT MISS

Verdemar Store from Minas Gerais, this concept blends a large gourmet store with a restaurant.

Assaí store (Grupo Pão de Açúcar's brand); **Atacadão store** (Carrefour's brand); **Maxxi store** (Walmart's brand), all of them are cash and carry stores or "atacarejos".

Natural da Terra, Hortifruti, Oba, Saúde store, all of them are specialized in fresh food and more than 50% of the sales area is dedicated to fresh food.



CANADA

By George CONDON, Canadian Grocer

RETAIL TRENDS

After three years of flat growth the Canadian grocery industry saw total sales increase by 2.1% in 2015. This was the result of a few new stores opening plus food **price inflation** for the first time in almost five years. **New supermarkets tend to be smaller** than those opened in the past reflecting a trend towards more neighborly retailers.

Full assortment Asian supermarkets continue to open at a rapid pace appealing to non-Asians as well as Asians.

Healthy products continue increasing in great numbers at retail outlets.

CONSUMER TRENDS

Canadian consumers, despite food price inflation, still spend less of their disposable income on food than almost any other country, the percentage in 2015 remaining at 9.17%. **Consumers here remain addicted to getting the lowest prices possible**, while seeking top quality. Shoppers have become experts in reading ingredient labels and **seek out healthier products**, avoiding products with excess fat, sugar, or salt. **Click and collect** retailing is in its infancy and may never reach the levels seen in Europe.

TREND 1: SMARTSHOPPING

Canadian consumers show a great deal of knowledge of the products, their ingredients and their benefits. They seek products that provide health benefits, and they do not want to pay more than necessary to get them. Products purchased at a discount now total 40% of all purchases.

HASKAP MAPLE SYRUP

Brand: Haskapa Products

Launch date: 01/2015

Category: Grocery

Family: JAMS / FRUIT IN SYRUP / SPREADS

General description: This product is a unique blend of haskap juice with maple syrup bringing out the flavor of the berry with a hint of maple. Haskap berries provide a wealth of nutritional antioxidants. Haskap Maple Syrup is an incredibly versatile product. Besides the usual syrup uses, it can be a cocktail ingredient, mixed with plain yogurt or even used as a topping for ice cream.



Why is this product a success? It's a new twist on traditional maple syrup where the maple syrup taste is secondary to the great taste of haskap berries. It has proved to be incredibly versatile, from a topping for pancakes and waffles, to a flavor for yogurt to a cocktail mix.



TREND 2: HEALTHY EATING

For the last eight years Canadians have increased their purchases of food at discounted prices. In 2015 the percentage of food bought at discounted prices touched 40%. But Canadians are devoted to finding healthier products, seeking out natural, organic, fresh, nutraceuticals, and any product that can be considered "good for me."

REAL COCONUT WHIPPED CREAM

Brand: GayLea Foods Co-operative

Launch date: 11/2014

Category: Grocery

Family: Condiments and sauces

General description: Gay Lea, Coconut Whipped Cream, is made with real coconut cream and is unique to the market, most likely unique in the world. It has an array of clean ingredients which will appeal to consumers who are health conscious and into all things natural. In addition, it's vegan certified.

Why is this product a success? The goal was to create a product that would deliver a unique flavor experience while addressing the growing consumer demand for products with natural ingredients. The key characteristics of this product are simplicity, convenience and exceptional taste.



TREND 3: CONVENIENCE

Canadians remain preoccupied with convenience products. Anything to save time and effort is likely to become popular, and it will remain so if it is a healthy product, tastes good and is priced right. Also, almost every new condominium in Canada has a grocery store in it to be more convenient for the tenants.

NUPASTA

Brand: NuPasta

Launch date: 12/2014

Category: Grocery

Family: SHELF STABLE READY MEALS (preserved, dried)



General description: NuPasta is a unique formulation for konjac root that results in a pasta substitute that has all the characteristics of traditional pasta but with higher fiber content and one tenth of the calories. Konjac has been consumed in Japan for years but its taste is unacceptable to Western consumers. The formulation and composition were created in Canada to modify the taste of konjac so that it appeals to Western tastes. Shelf stable, the product is gluten-free, non-GMO, Halal and Kosher.



Why is this product a success? NuPasta is a unique pasta substitute that is high in fiber and low in calories. Very convenient, the consumer simply opens the package, drains the pasta, and adds it to heated sauce. It's ready to eat in a minute. Spaghetti, angel hair & fettuccine varieties are offered.



NEW RETAIL CONCEPT

A store in Quebec is totally devoted to seafood, with separate displays and decor for each species of seafood, from lobster to squid, from cod to haddock, from herring to tilapia, etc. **Adonis stores in Quebec and Ontario** are geared to a middle-eastern customer but have great appeal to non-middle-eastern shoppers as well.

OTHER MAJOR RETAILERS

Urban Fare stores in British Columbia are high-end specialty stores that sell only the finest products from around the world, no matter what the price. Products are often flown in from other countries.

DO NOT MISS

Longo's Laird Drive store in Toronto because it is an exceptional conversion of an old railway station, with the best selection of products in the city and the best trained staff in Canada.

Loblaw's Maple Leaf Gardens store in Toronto because it experiments with all the latest retailing techniques and ideas, and holds a series of special events.

Farm Boy stores because they are totally devoted to fresh foods and healthy eating.



CHINA

By Yang SHU, *China Food Newspaper*

RETAIL TRENDS

1. Physical retailers' O2O (Online to Offline) multichannel search has taken place. One after the other, physical retailers have partnered up with the Internet. As of 2015, 85% of the top 100 commercial chain enterprises in China have got into e-commerce. Physical retailers have accelerated their supply chain integration to forge an internationalized supply chain; for example, the establishment of the Global Joint Purchasing & Crowdfunding Platform jointly by a number of companies. Physical retailers are developing from single-format towards multi-format, speeding up their extension into communities by developing convenient stores and small-scale specialty stores; for example, Carrefour and Metro have started to establish convenience stores.
2. The transaction volume of the e-commerce market in China has increased rapidly. E-commerce of food products is gradually developing into an important component of the entire e-commerce industry, as the online platform becomes the fastest developing distribution channel of food products. Among the food products sold on online platforms, imported food products and raw and fresh food are particularly strong in their growth momentum. At the present, imported food products account for 13% of online sales of food products in China, while raw and fresh food accounts for about 1%, both having great potential for further growth.
3. New business models, such as cross-border e-commerce and joint procurement of branded products, have become the new points of growth for import & export trade. There has been an explosive growth in cross-border e-commerce. In the first half of 2015, the volume of China's cross-border e-commerce transactions was two trillion Yuan, of which 85% was import. The growth rate of cross-border e-commerce reached 30% for the whole year. The main driving force for the growth in Internet retail of imported goods has originated from the continuous rise in demand from Chinese consumers for imported consumer products as well as the transformation and innovation of e-commerce companies and retail companies. At the same time, it has also benefited from the recognition and support of the government for cross-border e-commerce.

CONSUMER TRENDS

1. As the transaction volume of online consumer goods surges, mobile shopping has become the biggest highlight. As of December 2015, the Internet population in China is 688 million, with Internet penetration at 50.3%. The mobile phone Internet population is 620 million, which accounts for 90.1% of the overall Internet population. On 11 November 2015 ("double 11"), TMALL.COM, the largest e-commerce retailer in China, posted a single-day transaction volume as high as 91.2 billion Yuan, of which the volume of mobile sales exceeded 62 billion and accounted for 68% of the total sales volume. During the period from January to October 2015, retail sales for online physical products



amounted to 2.4454 trillion Yuan, which is an increase of 33%. Mobile shopping has developed rapidly, with its transaction volume surpassing that of PC terminals for the first time in the second quarter of 2015 and accounted for over 50% of the online shopping market; it has become the main driving force for rapid development of the online shopping market.

2. Online shopping mode and e-commerce promotion have stimulated the consumers' desire to purchase and have encouraged consumption. In product selection, apart from brand names and pricing of the products, the word of mouth by customers, service attitude of the merchants, deliveries and after-sale service have all become important factors influencing consumption behaviors.

TREND 1: SMARTSHOPPING

Online shopping and mobile shopping have become a trend, with more and more consumer groups pouring in for participation. Online platforms such as e-commerce and Weimob will become the platforms for launching new products for more and more food companies. 2O continues to exhibit a pattern of multichannel development: online ordering with collection at store, online ordering with delivery by the store, offline experience with online ordering, group purchase, mobile payment and other new business models will further expand the scope of development.

MEIYITIAN LOW-SUGAR ACTIVE LACTOBACILLUS BEVERAGE

Brand: Inner Mongolia Yili Industrial Group Co., Ltd / Yili Meiyitian

Launch date: 03/2015

Category: Beverages

Family: Soft drinks

General description: This product is an active lactobacillus beverage. Its target group is teenagers and people in their twenties. It contains thirty billion active lactobacilli per 100ml, and sugar does not exceed 5%, lower than similar products, so the point is that it has high active lactobacillus, lower sugar, with a nice flavor and lovely packaging design, and is beneficial to digestion.



Why is this product a success? Release of product's information and advertisement by online, mobile media, entertainment marketing, and targeting its customers precisely. It has achieved a great marketing share, and has taken the leading position in this segment.

TREND 2: BOOM OF CONVENIENCE STORES AND OTHER SMALL-SCALE SPECIALTY STORES

The boom of convenient stores and other small-scale specialty stores is continuing unabated. Downsized and personalized commercial projects with precise positioning and finely defined sectors are exhibiting great vitality. Experts hold a positive outlook for small-scale community stores, specialty stores and convenience stores that can achieve online and offline integration and stay close to the demands of communities. This will be a popular direction for physical retailers to transform beyond their present format. These small-scale specialty stores are characterized by the advantages



of being professionalized, elaborated, differentiated and convenient, and are becoming strong competitors of hypermarkets.

BROWNING FLAVORED FERMENTED MILK

Brand: Beijing Sanyuan Foods Co., Ltd. / SANYUAN / Browning

Launch date: 06/2015

Category: Grocery

Family: Milk

General description: The product is a new kind of yoghurt, is targeted at young people. It is made from fresh milk (not sterilized milk), through a special technology, the milk is heated with lower temperature for a few hours, and then it is fermented by probiotic means. It creates a new flavor, a light caramel smell and taste, with a natural sandy beige color and no food additives. It is packaged in a lovely bottle.



Why is this product a success? The product meets the psychological needs of young people pursuing novelty, difference, fashion and a meticulous lifestyle. Its marketing channels all-round have been opened up, so you can buy it anywhere. It has achieved sales accounting for more than 50 million RMB in the second half of 2015.

TREND 3: GLOBALIZATION

The demand of Chinese market for imported food products remains robust. Import volume for alcoholic beverages, baby and infant formula milk powder, snack food, seasoning and many other types of food products continues to exhibit a strong growth. According to the statistics, import of alcoholic beverages to China for the period from January to November 2015 totaled 1,567 billion liters, of which wine accounts for nearly 490 million liters with a year-on-year increase of 45.02%; while beer is in excess of 500 million liters, with a year-on-year increase of 61.44%. Some superstores have expanded their counters for imported food products, and some have established a special zone for imported food products. Driven by new business models such as cross-border e-commerce and joint procurement of branded products, the trend of internationalization of food trade will be increasingly prominent.

RUIBUEN ORGANIC BABY INFANT FORMULA OF MENGNIU DAIRY

Brand: Oushi Mengniu (Inner Mongolia) Dairy Products Co., Ltd / RUIBUEN

Launch date: 06/2015

Category: Grocery

Family: Milk

General description: The product is an organic milk powder for infants, a series product, including three products for infants in different age groups. Its material is sourced from the Alps





organic ranch in Northern Europe, so it does not contain antibiotics, chemicals, pesticides, GMO ingredients or synthesized hormones. It can promote healthy growth of infants.

Why is this product a success? The product conforms to the will of customers: a natural, organic, scientific formula, so it has a big market in China. As per O2O marketing strategy, 30.42 million RMB sales have been achieved in the second half of year 2015.

NEW RETAIL CONCEPT

1. Opening and sharing have become the mainstream of cognition for the society. The window of “shared economy” has started to open up in China’s traditional commercial market. “Physical retailers + Internet” have developed in partnership, connecting online and offline sales channels while integrating upstream and downstream of the supply chain with cross-industry and cross-border cooperation. This has brought about mutual complementarity of advantages and sharing of benefits.

2. The concept of a consumer-led retail market will be applied to business innovation by an increasing number of merchants, which will overturn the retailer-led business model of the past. Experts suggest that more and more consumer-centered business models will emerge, and some C2B models that are customer-led and focus on customer demand will enjoy faster development.

3. Online platforms are used for launching new products or product trials. This can lower marketing costs and make marketing strategies more precise and highly effective. At the same time, more direct and extensive communication with consumers can be achieved.

OTHER MAJOR RETAILERS

1. More refined product positioning: From product design to marketing and promotion, greater emphasis is placed on precision and high effectiveness of market positioning.

2. Word of mouth marketing: Consumers are encouraged to evaluate the products they purchased and services of the merchants to help customers choose products with high price-performance ratios and promote honest operation of merchants in order to raise service quality.

DO NOT MISS

1. Large scale integrated superstores: in line with the shopping habits of the general public, particularly middle aged and elderly persons.
2. E-commerce: the new point of economic growth for the retail industry, with a vast scope for development.
3. Convenience stores and specialty stores: provide the convenience of nearby shopping to consumers, which facilitates an interactive retail shop model with online and offline integration.



CZECH REPUBLIC

By Petr HŘÍBAL, *Zboží&Prodej*

RETAIL TRENDS

New Lidl concept: A discount giant has been changing its strategy. A new generation store was opened in December 2015 in Beroun, a district town 30 km south of Prague (facing fierce competition from other retail players there), the first shop of its kind in the EEC region (so far only one in Italy, which opened last year). More comfort and space for shoppers, wider parking areas, light airy interiors with wide aisles, a large bakery, up to 20% larger sections for fresh food, more cashiers with a new swap space, toilets with a desk for mothers and their babies, coffee-to-go; on the second floor: a relaxation area for employees with a terrace, showers and a training room. Investment: €33 million, employees: 25.

CONSUMER TRENDS

People want to spend less time in a shop: online shopping, small convenience stores, big players are trying to make shopping time shorter (new technologies for making the process faster, e.g. self-scanning, contactless payments...), new FMCG e-shops: Rohlik.cz, Kolonial.cz, Kosik.cz.

Boom of regional/farmers' products and shops: people like to purchase local products from farmers, either in open markets (organized by towns in squares or by shopping centers) or in specialized farmers' shops. They are ready to pay more for products delivered straight from the field.

Increased awareness and education of general public about food: consumers seek and require details on products, their origin and ingredients.

TREND 1: THE POPULARITY OF CHOCOLATE

The crisis is over, the economy is doing well, and unemployment is low. People are not under pressure, they are ready and want to spend more money. They can also afford higher quality and more expensive products, including treats, like chocolate. The boom of the popularity of chocolate brings fantasy to producers, who present more and more innovations, chocolate products of various kinds. Some of them offer unusual and delicious flavors and tastes, making the chocolate darker and even more bitter.

CHMELINKY AND KONOPKY

Brand: Carla

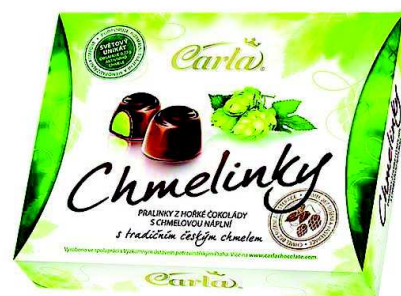
Launch date: 11/2014

Category: Grocery

Family: Chocolate products

General description:

Chmelinky (130 g): chocolate bonbons made of 70% plain chocolate with hops filling (0.27 g). Hops do not have to be necessarily linked with the brewing of





the so popular beer. The package contains 10 bitter chocolate bonbons filled with unpasteurized hops which support the function of the digestive system. Konopky (130 g): moulded bonbons in 70% plain chocolate with hempen seeds filling (peeled hempen seed: 6.3 %).

Why is this product a success? Czech company, using traditional recipes and unusual ingredients, making its products attractive and delicious. Taking advantage of the growing popularity of dark chocolate, which can be darker and more bitter than one can imagine.

TREND 2: HEALTH AND HEALTHY LIFESTYLE

Consumers have changed their attitude; they are more informed and educated. Therefore they are more interested in taking care of their health; healthy lifestyle is in. They simply want to know what they are eating and drinking. The majority have enough money to choose products accordingly. They long for natural food and drinks, ideally refreshing, with great taste, low-calorie content, without sweeteners and preservatives. We see a growing popularity of organic, free from, vegetarian, vegan food and drinks.

CRAWNCHIES

Brand: Lifefood

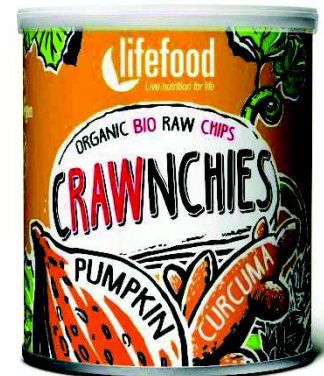
Launch date: 03/2015

Category: Grocery

Family: Dehydrated food



General description: The first raw vegan stackable chips in the world. A raw vegetable snack, made with flax seeds, nutritious veggies and the finest herbs. Gently dehydrated below 42°C, keeping all the nutrients intact. High in fibre, a source of protein.



Why is this product a success? Crawnchies respond to the most demanding expectations of today's customers and their entitlement to food - namely great taste, made from premium ingredients, benefits for health and ecologically friendly, yet practical packaging.

TREND 3: REFRESHING THE TRADITIONAL BRAND

In order to attract the attention of consumers "spoilt" by a really wide assortment they can choose from among various formats, some producers turn to refreshing their traditional, conservative brands. If they want to get brownie points from especially younger consumers, they have to be sexy and cool. Producers are opting for new, attractive packaging together with catchy advertising campaigns and contests.



PILSNER URQUELL 1L 2015 LIMITED EDITION PACKAGING

Brand: Plzeňský Prazdroj

Launch date: 12/2015

Category: Beverages

Family: Beers / Ciders

General description: The objective and opportunity are to drive Pilsner Urquell super premium and quality perception by differentiated unique packaging in line with brand communication strategies.

First 1L bottle in 2010. Every 2-3 years the bottle design/packaging is changed. In December 2015: super premium price 500% WAMP (Widely Available Market Price), recommended shelf price 169 CZK.

Why is this product a success? Consumers perceive Christmas as an occasion to reward themselves with premium products and Pilsner Urquell is a natural choice among premium beer brands. Premium beer brands in limited editions are used for gifting occasions.



NEW RETAIL CONCEPT

MasterPass - payments by a smart phone: the joint project of MasterCard and Globus ČR responds to the latest trends and makes payment easier at selected POS terminals. MasterCard Worldwide together with the retailer introduced an innovative solution for fast and efficient payment in supermarkets. Customers of the hypermarket in Prague Čakovice can now pay for their purchases using their smartphone and the global payment service MasterPass, saving time and enjoying more comfort.

OTHER MAJOR RETAILERS

Kaufland ČR, Tesco Stores ČR, Ahold Czech Republic, Penny Market, Makro Cash & Carry ČR

DO NOT MISS

Delmart – a deli store next to the metro station near the center, nature-material-based interior, offering high quality Czech deli food products and a bistro upstairs, where you can “mix” the ingredients of your meal, more at: www.delmart.cz

Kunratická stodola – a former barn transformed into a regular unpretentious store full of mainly very fresh high quality fruit and vegetables and some other food products delivered directly from Germany and France, more at: www.kunratickastodola



FRANCE

By Florence BRAY, LSA

RETAIL TRENDS

In France, the year 2015 saw the **price war continuing**, accentuated by the more intense promotional activities.

The consumer goods sector closed with +1.6 in value and 0.6 in volume.

Regarding distribution channels, **drive-in and neighborhood shops show dynamic progress**.

Another highlight is the great comeback of Lidl.

The beverages sector is the most dynamic, the private labels sector is the least dynamic.

CONSUMER TRENDS

Several trends continue to gradually rise around **organic, natural and gluten free**.

The **fight against food waste** has gained momentum especially with the launch of “Les Gueules Cassées”.

Trading shows an increasingly on-line trend.

TREND 1: COMBATING FOOD WASTE

Thanks to initiatives such as Provins' Intermarché in 2014 (ugly fruits and vegetables operation) the fight against food waste has grown very fast among French distributors.

During the COP 21, this topic became media-friendly in France. The largest global retailers have agreed to undertake to reduce their food waste by half by 2025.

UGLY CEREALS THAT ARE JUST AS GOOD AND CHEAPER

Brand: Les “Gueules Cassées”

Launch date: 03/2015

Category: Grocery

Family: Cereals

Sub-family: Cereals



General description: First there were ugly vegetables, now there are ugly cereals! The “Les Gueules Cassées” collective, which made its name with its campaign of non-graded fruits and vegetables selling 30% cheaper in big box stores, has extended its approach and now proposes, since March 2015, cereals with visual defects but of identical quality. In other words: ugly cereals that are just as good while being 30% cheaper (€1). An ugly Camembert is to follow, among others, and the potential is enormous!

Why is this product a success? It's a product that testifies to the desire of manufacturers to make the most of produce that was previously discarded, and of retailers such as Carrefour to take part in this extensive campaign to fight against food waste. The consumers are on board.





TREND 2: THE ORGANIC, THE GLUTEN FREE AND MORE BROADLY THE NATURAL

Because of food scandals and consumers' lack of trust regarding the food industry, consumers are willing to eat better and healthier in France. This has resulted in the growth of organic products (+10% in 2015). This trend holds appeal to both industrialists and distributors.

Another illustration of this trend is the growth of gluten free, veggie products and on a wider scale, natural products with no preservatives, no coloring agents and no antibiotics.

FLEURY MICHON'S "J'AIME LE JAMBON" Antibiotic free ham production

Brand: Fleury Michon

Launch date: 09/2015

Category: Fresh products

Family: Meat, Delicatessen, Poultry

General description: Fleury Michon, in partnership with the Avril group, proposes an antibiotic-free and GMO-free range called: "J'aime...". This range of deli products is produced using pork from animals fed without antibiotics as soon as they have been weaned. Four product references of quality roast pork ham are on offer at prices varying from €1.69 to €3.09 (or 10 to 20% more expensive than standard rates).



Why is this product a success? Antibiotic resistance is an ever-increasing health concern. Fleury Michon looks to address this, and has gone the extra mile by creating a specific channel. Initially, 21 livestock farmers have been taken on board, with an objective of 100,000 pigs per year.

TREND 3: DIGITAL

The digital revolution is making great strides in France. Retailers are putting the omni-channel strategy to good use.

Also specific to France, Drive-in stores have been constantly growing (+17 in 2015), such as the "Click and Collect" (online purchase and pick up in store).

On the whole, sales outlets have become more and more digital: sellers with tablets, digital walls.

Insofar as products are concerned, the digital revolution is less pronounced than in other sectors.

THE CONNECTED BISCUITS

Brand: Poult

Launch date: 11/2015

Category: Grocery

Family: Biscuits

General description: This connected biscuit initiative - emanating entirely out of south-western France - was conducted by Groupe Poult, the start-up Ubleam, the cooperative Arterris and the Pasteur Clinic, situated in





Toulouse. The purpose of this project is to propose a biscuit combining nutrition, technology and information. In concrete terms, consumers scan the logo on the biscuit packaging using the Ubleam app, and the cookie appears in augmented reality, with information on programs dedicated to health, education and environment. This biscuit was given to children during the COP21.

Why is this product a success? In the face of an avalanche of connected objects, the food business is still fairly tentative. This initiative is therefore interesting, since it paves the way to other, similar projects.

NEW RETAIL CONCEPT

The new **upgraded Lidl**, the convenience store **“Mandarine” by Franprix**, the **“Bon App” Stores by Carrefour** (snacking concept located at places where there are many passersby) and also the **Monop’Lab** concept in railway stations.

OTHER MAJOR RETAILERS

Also notable in France: the growth of the local convenience store that is the focus of distributors and the change Lidl is bringing about in supermarkets.

DO NOT MISS

Lidl, Boulevard Jourdan – Paris because it shows a new vision of hard discount, merging into supermarkets.

Biocoop Dada, Rue de Paradis in Paris, because it’s a new concept of organic stores.

Monop’Lab Gare Montparnasse, because it’s an interesting concept that combines food and non-food products in railway stations.



GERMANY

By Linda SCHUPPAN, *Rundschau für den lebensmittelhandel*

RETAIL HIGHLIGHTS

Concentration of the retail market rises: Edeka is strengthening its market share by taking over Kaiser's Tengelmann.

Discounters are trying to regain lost market shares by listing more and more brands/A-labels. Aldi announced the listing of close to 50 brands. Lidl recently sells itself as a Premium-retailer in TV and Aldi is setting up a new future-concept.

Upcoming Gastro-Trend: more and more supermarkets integrate gastro-systems in order to set themselves apart from the market (e.g. Sushi bars, juice bars, dry-aged-beef bars).

CONSUMER HIGHLIGHTS

Number of food-shopping trips during the week decreases - **out of home** is becoming an increasingly popular trend.

Home delivery is increasing (focus on bigger cities). **Private labels** are catching up in trust and perception (75% of German consumers consider private labels to be on par with branded products).

TREND 1: FREE FROM, VEGAN, VEGGIE

The number of vegetarians, vegans and flexitarians is growing (German population: 81 million; 5 million vegetarians, about 1 million vegans and about 40 million flexitarians). The industry is responding with more products in this sector. Supermarkets are pushing their offers and consolidating their range on the shelves. Meatless products have become a multi-million-Euro business. More and more vegan restaurants and vegan supermarkets are showing up (focus on bigger cities).

VEGETARISCHE MÜHLEN CHICKENBURGER

Brand: Rügenwalder Mühle

Launch date: 11/2015

Category: Frozen Products

Family: Savory Frozen Products



General description:

- A frozen vegetarian chicken patty to be served as a burger
- High Convenience: ready in 10 min in a pan or in the oven
- Small package targeted especially for single households

Why is this product a success? Rügenwalder (known for classic meat products) changed its strategy as meat consumption is decreasing and started producing meat alternatives. In a short time Rügenwalder became a leader in meat alternatives. The targeted sales volume is 30%.



TREND 2: SUPERFOODS & HEALTH

Chia seeds, aronia, quinoa, açai berry, goji, matcha tea... the so-called superfoods are becoming more and more popular alongside daily nutrition. Conventional products (bread, yogurt, cereal...) are integrating this trend into their ingredients. Low-carb nutrition is in vogue. Healthy nutrition is becoming a matter of faith.

SKYR

Brand: Arla Foods

Launch date: 06/2015

Category: Fresh products

Family: Dairy Products



General description:

- Mixture of yogurt and curd cheese
- Traditional product from Iceland almost fat free
- Skyr opens up a brand new category in dairy shelves
- Healthy-trend product

Why is this product a success? The target group is an increasing number of consumers who want to eat healthy and fat free but still want to indulge themselves.

With Skyr Arla combines these two worlds in one product. Interesting for retailers as Arla opens up a new category at the point of sales.

TREND 3: CONVENIENCE, OUT OF HOME AND SMALL PACKAGING

As supermarket trips during the week are decreasing, convenience and out-of-home solutions (ready-to-eat meals, fresh-cut salads and fruit cups, ultrafresh pasta products, etc.) are preferred. As the number of single households gets bigger, the FMCG sector is laying emphasis on small packaging.

RUSTIPANI

Brand: Nestlé Wagner

Launch date: 01/2015

Category: Frozen products

Family: Savory Frozen Products

Sub-family: Other



General description: Sandwich meets Pizza: Rustipani is a new frozen snack – farmer bread with rustic topping. It opens a new segment in the freezer.

Why is this product a success? Nestlé Wagner created a new frozen-snack category with Rustipani - both for retail and consumers. A convenience product that accelerates the home eating factor.



DO NOT MISS

Edeka Zurheide, Düsseldorf

Edeka Hieber, Lörrach

Kaufland-concept-store

Frankfurt Eataly, Munich

Aldi future-store, Unterhaching (close to Munich)



HUNGARY

By Zsuzsanna HERMANN, *Trade magazin*

RETAIL TRENDS

Retail sales started to grow again in 2014 in Hungary and this trend continued in 2015. Multinational retailers started testing new channel formats, for instance SPAR is opening franchise stores. From March 2015 to spring 2016, shops must stay closed on Sundays, which is a rather common practice west of Hungary but here consumers were reluctant to accept the State's intervention in the market that was operating freely. Retail sales shifted to make Friday, Saturday and Monday better performing days.

CONSUMER TRENDS

Households' FMCG spending started to improve in 2014. The trend continued in 2015 – but at a lower growth level. After the years of crisis, both in 2014 and 2015 there was volume and value growth again. Signs of recovery: volume growth, category-level penetration growth, more purchase acts, and in 2015 up-trading again, which means that consumers started to switch back to manufacturer brands from cheaper brands/private labels.

TREND 1: CHANGING CONSUMPTION

New challenges for FMCG manufacturers: consumption habits are changing, particularly with the new generations growing up. Millennials snack more often, on a typical day millennials have breakfast, lunch and dinner less often than older generations – instead they snack more often. Millennials eat out of home more often; they eat on the go and visit restaurants more often than older generations. Changing consumption habits impact the FMCG spending of households.

SNACKI&GO!

Brand: Saga

Launch date: 06/2015

Category: Fresh products

Family: Meat, Delicatessen, poultry



General description: The Snacki&GO! fits perfectly into everyday eating habits, because it is an excellent choice instead of salted or sweet snacks or also together with them. The plastic cup packaging makes it possible to eat the single-portion wiener bites any time. There is a plastic fork under the cup's lid, by using this, consumers can eat on the go. Hygiene is guaranteed with a closing foil, on which there is also information about how to use and eat the product. It can be eaten cold or heated.





Why is this product a success? Mini turkey wieners have been in the Sága portfolio for many years, but to enter the snack category with this product a new type of packaging was made – it makes it possible to eat the wieners anywhere and anytime. It is a unique product in Hungary.

EISBERG TOKAJ DRESSING AND VINAIGRETTE

Brand: Eisberg

Launch date: 09/2015

Category: Grocery

Family: Oils and vinegar

General description: Something for real gourmets, who like to eat their salad in a bit more exciting way even on busy weekdays. A dressing made with cider vinegar and Tokaj Furmint wine vinegar, sweetened with concentrated apple must. Vinegar has magical characteristics, which was proven many times in the last few hundred years. For example bad quality drinking water was mixed with vinegar to disinfect it – to make it clean enough to drink it. It was also used for treating wounds and bites, and some people drank it in order to digest food better. Latest scientific research found that vinegar has antimicrobial characteristics and this effect is most justified in connection with food production processes. There is more and more proof that vinegar can be effectively used for treating people suffering from carbohydrate and lipid metabolism problems. It is also very important for everyone to eat enough vegetables and fruits, because these are our biggest sources of vitamins and minerals, plus they also contribute to our liquid intake. No matter if we eat vegetables raw or cooked, they can be made more tasty and exciting by adding various types of vinegar to them. It is important to know that oil and vinegar dressings are usually best for flavouring leaf vegetables which have low calorie content, low glycemic index and are rich in nutrients. Eating them means lower energy intake. Vinegars – especially wine vinegar – aren't only good for making salad dressings, but also for making marinades for meat or fish. Although different types of salads are very tasty in themselves, for a very long time we were looking for a method to make them taste even more sophisticated. This is how our Tokaj Dressing product line was created, which is made from cider vinegar and wine vinegar from Tokaj Furmint wine.



Why is this product a success? The product doesn't contain additives, preservatives, flavourings, sugar or colourings and it is GMO-free and gluten-free. The natural taste of wine vinegars made from cider and Tokaj Furmint is special because of the fresh, tasty fruits which stay in them for many months. In the aging period the fruits give their colour, taste and scent to the vinegar and the final result is: Tokaj Dressings aged on apple, raspberry, plum and quince bed, which are unlike any other product – not only in Hungary but in the world. No colourings, no added sugar, no extra preservatives – the vinegar itself does the job. In the case of two products these flavours were enhanced further, with award-winning Spanish olive oil and spices – with a mix of cumin and coriander (Tokaj Vinaigrette Oriental) and with a mix of sea salt and pepper (Tokaj Vinaigrette Balsam). Primary packaging: 40ml bag.



Market performance: Product launch date: September 2015. On 14 November 2015 Eisberg Hungary Kft. won the Diabetic Product of the Year award with its high quality salads and with the new Tokaj Dressing dressing product range.

TREND 2: CHANGING RETAIL STRUCTURE

Food Discounters are strengthening their market position, the hypermarket channel lost out while discounters won market share in 2015 as compared to 2014. Consolidation of the retail trade continued, the market share of the top 10 retail chains is over 70%. Retail chains are fighting for retaining sales internally; the intention to transfer spending to other chains is low. Purchasing habits are still evolving: in the last 6 months, the role of weekdays became more significant, along with Friday and Saturday being the busiest days.

VENUSZ VANILLA FLAVOURED BAKING MARGARINE (80%)

Brand: Bunge

Launch date: 11/2014

Category: Fresh Products

Family: Dairy Products

General description: We use vanilla very often. Another ingredient that is used in every nice cake or biscuit is margarine. These two good things were combined to create the vanilla flavored baking margarine for women who like to make delicious cakes and biscuits. It can be used for making sweet biscuits and cakes, and is intended to those who like the taste and scent of vanilla and like vegetable-based (lactose-free) products.



Why is this product a success? It is very innovative, it has a premium fat content (80%) and the special characteristic of vanilla flavor and scent – these make the biscuits and cakes taste really special. Hungarian production makes this product stand alone in the Hungarian market.

TREND 3: E-COMMERCE

This started to transform from exceptional shopping trips to a more usual way of purchasing in the FMCG market: although the online channel's share from total FMCG turnover is still very low in Hungary (below 1%), more and more buyers have a try at shopping online. Trust in the online channel is strengthening, consumers increasingly prefer buying fresh food and dairy products via the internet, but they still like branded products more. An average online FMCG basket is 3 times bigger than offline.

SPORT PASTA, VITALE PATSE, SPORT PASTA EXTRA

Brand: Familia Pasta

Launch date: 04/2015

Category: Grocery

Family: Bread Making



General description: Pastas fortified with Calcium and Vitamin D are made from pasta flour, fresh eggs, calcium+D3 vitamin complex. Sports Pastas are made to fit into a healthy and sporty lifestyle with a conscious diet, they contain less carbohydrate but are rich in protein and fibers. Sports Pasta ingredients: pasta industry wheat flour, 4 fresh eggs and low-carbohydrate pasta flour concentrate (wheat-gluten allergen). Ingredients contain 50% less carbohydrate, 2.5 times more protein and 6 times more fibers.



Why is this product a success? Wholemeal and Calcium+Vitamin D fortified pastas contain essential ingredients which help people of all age groups to stay healthy and live a balanced life. Increased calcium content makes bones and teeth stronger and muscles work better.

NEW RETAIL CONCEPT

The franchise concept has been continuously growing stronger in several retail channels. The latest success story is a fruit and vegetable shop chain with a 'future store' concept, called Vitamin Salon. The goal of the Vitamin Salon franchise system is to sell high-quality fruits and vegetables – produced with the dedication and expertise of Hungarian farmers and coming only from the most reliable sources – in Hungary and abroad. Vitamin Salon combines the benefits of corner shops with the advantages of retail chains.

OTHER MAJOR RETAILERS

One of the new concepts on the manufacturers' side is the shop-in-shop system. Nestlé continues the string of openings they started last year, by integrating NESCAFÉ® DolceGusto® sales points into the units of various retailer partners. With the 'Turn coffee drinking into an art form' program, Nestlé won a SuperStore award in the shop-in-shop category last year. We saw the concept's most beautiful realization in the Media Market store in the WestEnd City Center in Budapest.

DO NOT MISS

The SPAR won the SuperStore award's Store of the Year Hungary and also the Supermarket category in 2015 (Budapest MOM Park premium supermarket store). The Superstore pop-up category winner is Coca-Cola's pop-up store in Budapest Millenaris park (temporary presence). The SuperStore non-food specialist category winner is BENU pharmacie in Budapest Blaha Lujza ter.



INDIA

By Rajneesh SHARMA, *Food and Beverage Business Review*

RETAIL TRENDS

In India, modern trade has nearly a 5% share of total retail sales. Loyal consumers are the key to sustained growth in the modern retail segment in India. Thus retailers are now offering Private Labels. **Private Labels are catching up fast with consumers** and have shown a consistent growth in sales. 58% of modern trade shoppers buy Private Label brands regularly. 29% of consumers believe that the quality of Private Label brands goes hand in hand with renowned brands.

CONSUMER TRENDS

Customers' loyalty is the key to the sustained growth of modern retail in India. Modern retail marketing now revolves around relationship marketing to foster customer loyalty, interaction and long-term engagement. Stores are in regular touch through social media, smart phones and e-mails regarding special offers, new product arrivals, special events, etc. Personalized Retail is a trend where the **retailer provides an in-store experience** that is customized for each visitor.

TREND 1: CONVENIENCE

About 79% of households prefer to have instant food due to a steep rise in dual income levels, standard of living and convenience. 76% of parents, mostly both working, are serving easy-to-prepare meals at least 10-12 times per month. Urban areas account for 80% of the demand for packaged food and about 76% of nuclear families feel they have less time to spend in the kitchen, while nearly 79% of bachelors prefer convenience food.

SOUPS

Brand: Hindustan Unilever Ltd. / Knorr

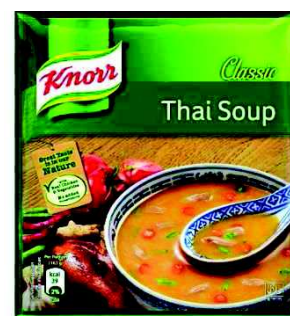
Launch date: 06/2015

Category: Grocery

Family: Soups

General description: Thai Vegetable Soup and Mexican Tomato Corn Soup offer exotic ingredients and delicious taste.

Why is this product a success? Knorr soups offer the convenience of preparing authentic international soup at home customized to the Indian taste palate. Made from exotic ingredients, they offer an authentic flavor, a tantalizing aroma, perfect consistency and unmatched taste.





TREND 2: TRADITION

The traditional snack food market is witnessing multiple innovations. The traditional salty snack is the fastest growing category. The snack foods business in India consists of three categories - Western snacks, traditional snacks and a mix of the two. The macro snacks category that consists of biscuits, salty snacks, chocolate and confectionary, is growing at 20 per cent.

CHOCOLATE

Brand: Mondelez India / Cadbury Dairy Milk Silk - Bubbly

Launch date: 07/2015

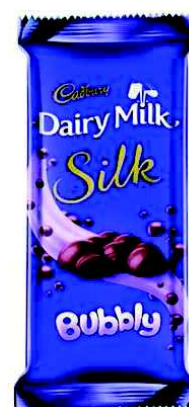
Category: Grocery

Family: Chocolate Products



General description: A unique chocolate bar brimming with “bubble inside and bubble outside”.

Why is this product a success? Silk Bubbly is a unique product format and melts in the mouth to give a light yet indulgent Silk experience. The product has been widely accepted due to the experience it gives. Mass advertising and reach has made it popular pan India.



TREND 3: HEALTH

Changing lifestyles and an increasing health awareness are influencing consumers' food and beverage product choices. The key health concerns include diseases of the heart and digestive system, obesity, depression and anxiety, lack of energy and stamina. Consumers' changing dietary habits and willingness to try new things are pushing higher growth in this segment. Indians more actively buy and consume healthy products. The younger generation's primary health concern is their physical appearance.

Coca-Cola Zero

Brand: Coca-Cola

Launch date: 11/2014

Category: Beverages

Family: Soft Drinks

General description: Soft Drink - a healthy beverage for hydration needs.

Why is this product a success? Provides a healthy beverage choice in a social and demographic set-up, where consumers are increasingly demanding safe, hygienic, high-quality and consistent hydration options. The product is widely advertised and promoted through tasting sessions.





NEW RETAIL CONCEPT

A significant number of **compact hypermarkets** with a carefully selected product range, which will revolutionize Indian modern trade, are in the development stage. These formats are tailor-made for a specific region / locale, offering region / locale specific products with multiple choices and price ranges. They are the answer to 10 million traditional retail stores (Kirana Stores) now facing competition from these formats.

OTHER MAJOR RETAILERS

Godrej Nature's Basket, the retail venture of the Godrej Group, has 36 premium gourmet stores in major metros. Nature's Basket is India's foremost retail destination for fine foods from across the world. To meet the growing gourmet food demand of the Indian consumers, they have introduced sophisticated and exotic tastes from around the world.

DO NOT MISS

HyperCITY, Nature's Basket, Foodhall. These stores are the most innovative modern retail formats in India, offering a comprehensive range of food products from grocery, fruits and vegetables, bakery, dairy, meat, poultry and fish, wine, beer and spirits to gourmet products. They offer interactive services for consumers on the products and even cuisines & recipes. They regularly update their portfolios to meet the real needs of consumers and provide high food safety and quality, thus value for money.



IRELAND

By Stephen WYNNE-JONES, *Checkout*

RETAIL TRENDS

As Ireland emerges out of a deep recession, the most noticeable trend has been the lack of recovery in the grocery industry, in terms of value and sales increases compared to other retail sectors. While Irish consumers once again have more money in their pockets, **the grocery sector remains caught in a discount trap**, with each of the main players, SuperValu, Tesco, Dunnes Stores, Aldi and Lidl, seeking to outdo each other on price.

CONSUMER TRENDS

There has been much discussion as to whether the Irish economic recovery is really happening, or whether it is “all Blarney”, but on the streets of Ireland, and particularly Dublin, **there is a new found confidence**, with busy restaurants and bars (even during the week), car sales up, holiday sales up, and renewed interest in the property market. There's a real feeling that after all the pain, we are finally “turning the corner”.

TREND 1: PRICE WAR

Arguably the most impactful promotional device utilized by any retailer in the past year was a vouchering campaign commenced by Dunnes Stores in late 2014, and continued right through 2015, offering €10 off if a consumer spends €50 or more. Both discounters, Aldi and Lidl, have also used a similar device intermittently over the course of the year. However, other retailers, such as the market leader, SuperValu have adopted a different tactic – its Food Academy program, which championed small suppliers, was a big hit, and saw the emergence of brands such as Patel's, The Happy Pear, and Pasta Magic.

PASTA MAGIC

Brand: Leaves

Launch date: 02/2015

Category: Grocery

Family: Starches, pasta, rice

General description: #PastaMagic is a unique range of flavored pastas made using exclusively buckwheat and chickpea. Using these ingredients means that a portion of #PastaMagic contains more protein than two sausages, constitutes one of your five a day and is free from wheat, dairy and eggs. Leaves' pasta cooks al dente in just five minutes.





Why is this product a success? The greatest innovation of this product is that it completely shifts consumer perceptions of pasta from a secondary ingredient that always needs to be paired with something else, to a complete, balanced, delicious meal solution.

TREND 2: DEMAND FOR HEALTHIER OPTIONS

One of the most important trends has involved product reformulation. With growing childhood obesity and increased concerns about public health - including discussions about a 'sugar tax' at the government level, there has been a concerted effort from food manufacturers to use more natural and healthier ingredients and promote healthier product ranges with their portfolio.

HIRO BY ROISIN

Brand: HIRO by Roisin

Launch date: 03/2015

Category: Fresh products

Family: Ready-made meals



General description: This revolutionary product is an exciting chilled, fresh, complete meal range that will change your thoughts on healthy eating. The product uses noodles developed from the konjac plant, from which flour for pasta and noodles can be made. This means that the product is entirely carbohydrate free and is one of the healthiest, lowest calorie meals available – as low as 100 calories!



Why is this product a success? HIRO by Roisin is a unique and innovative range of chilled, healthy ready meals that is completely different from anything else on the market.

TREND 3: SUPPORTING SMALL PRODUCERS

The "Buying Irish" trend has long been associated with the Irish grocery sector - consumers here, like to support their own. But the past year has seen renewed interest for support for smaller, up and coming producers. Market leader SuperValu unveiled "Food Academy", last year, to celebrate small producers, while Tesco also operates its similar 'Taste Bud' initiative.

COOL BEANS

Brand: The cool Bean Company

Launch date : 11/2014

Category: Grocery

Family: Shelf stable ready meals (preserved, dried)

General description: Cool Beans is a healthy meal in a pot. Cool Beans is a range of meal options using the cannellini bean as its main ingredient, cooked with chopped tomatoes, diced onion and garlic. The product range comes in three delicious flavors: Original Tomato, the award-winning Smokey Paprika and Hot Chili.





Why is this product a success? The success of this unique product is down to the fact that it uses healthy ingredients and is available in a convenient pack format, coupled with eye-catching branding.

NEW RETAIL CONCEPT

Natural Meal Accompaniments: Consumers are increasingly looking for healthier alternatives to pasta, fries, rice, and other foods that they can have with their meals.

Healthy Snacking: Building on the free-from trend, consumers are looking for products that meet specific health/dietary requirements, but also taste great.

Meal/Snack Pots: Driven by growth in food-to-go, consumers are demanding more convenient meal options, which are also healthy

OTHER MAJOR RETAILERS

The past couple of years have seen an explosion in the use of the in-store environment as a key marketing tool - things like shelf-talkers and floor graphics aren't new, but many brands are ramping these up to incorporate whole aisle takeovers, encouraging consumers to think differently about particular categories, and promoting a cross-category sales approach.

DO NOT MISS

Centra O'Connell St, Limerick - The first example of a brand new convenience store concept that Musgrave Group, which operates the Centra chain, plans to roll out nationwide. **Topaz Ballacolla, Co. Laois** - Winner of the NACS 2015 International Convenience Retailer of the Year last year, an example of how a forecourt store should look; modern, fresh, quality food. **Spar Dame St, Dublin** - Arguably the best food-to-go c-store in the country.



ISRAËL

By Arik YANAI, *Kupa Roshemet*

RETAIL TRENDS

1. The food antitrust law weakens leading suppliers and increases the exposure of smaller suppliers.
2. The collapse of the second largest retail chain, due to poor management, led to their acquisition by a heavy discount chain.
3. The big retail chains are adopting the private label trend and gradually increasing the number of categories of PL products. Meanwhile parallel imports continue to develop.

CONSUMER TRENDS

1. Consumers are getting used to private brands and acquire them as an alternative to more expensive labels.
- 2 As a result of the erosion of wages on the one hand and rising prices on the other hand, the acquired product portfolio contains a smaller quantity of goods or substitute products.

TREND 1: CUSTOMERS DON'T WANT UNHEALTHY FOOD

Categories perceived as less healthy suffered from a significant decline in volumes in addition to several new product launches in the healthy food category.

SCHNITZEL SERIES

Launch date: 06/2015

Category: Grocery

Family: Shelf stable ready meals
(preserved, dried)



Ready to eat Schnitzels – Raised Without Antibiotics, No Added Hormones and 100% Natural Ingredients: No artificial colors, No preservatives, No added phosphates, No added stabilizers, No added MSG



TREND 2: STORE FORMAT

Quality specialty stores, such as organic or health-oriented stores, will increase the awareness of consumers making them search for a bigger variety of superior quality or unique products.

STARKIST LE SALAD

Brand: StarKist Food'Or LTD

Launch date: 07/2015

Category: Grocery

Family: Tinned fish



General Description: A unique development worldwide – Canned light tuna chunks with salad dressing, ready to eat and easy to use.

Distribution channels: Organized retail food sector, privately owned food store chains, hypermarkets, supermarkets, discount stores.

Why is this product a success? Simply open a can, empty its contents into a bowl of chopped vegetables, and mix. The product line includes three choices of dressing: Vinaigrette, Caesar, Oil-garlic-lemon. No preservatives, No refrigeration.

TREND 3: RISING CATEGORY

Growth of pampering and luxury categories.

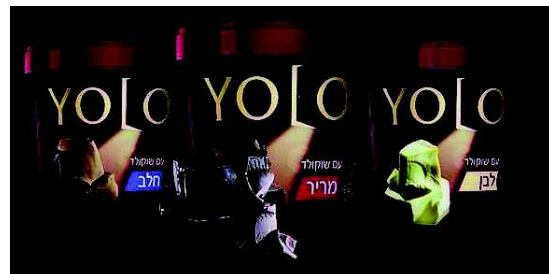
YOLO

Brand: TNUVA

Launch date: 02/2015

Category: Grocery

Family: Desserts



General Description: Yolo is the only dairy dessert series with real chocolate (at least 15% chocolate)

Why this product is a success? It created a whole new category in dairy desserts, and brought the essence of indulgence to the dairy refrigerator.

NEW RETAIL CONCEPT

The strengthening of the private label and parallel imports will lower the prices of traditional suppliers of brands.

Skipping the store: a warehouse of goods marketing directly to consumers through an online site (similar to Amazon Fresh).



OTHER MAJOR RETAILERS

Israeli ventures, such as Waze for example, increase the influence of the cooperative factor in other areas such as shared meals, deliveries and getting merchandise to retailers.

DO NOT MISS

Due to the significant changes in Israel and the fact that the second largest retail chain collapsed and was bought by a heavy discount chain, the market situation is unclear at this point. In two months' time, we will be able to introduce three new stores.



ITALY

By Leonardo RASTELLI, *Largo Consumo*

RETAIL TRENDS

Retail closed 2015 with a negative turnover (-0.02% - Nielsen – 29/12/2014 – 06/12/2015): only North West increased its turnover, by less than 1%. The grocery area registered +1.4% thanks to food and beverage particularly. During 6 months of Expo Milano (Universal Exposition), large-scale retail trade increased +4% in Milan and +1% in the North West. **Private labels stopped to run** at 18.3% but the **segment premium is increasing**. It's reducing promotional pressure at last.

CONSUMER TRENDS

2015 registered a slight growth in food consumption (+0.2%). The Italians' trust quotient increased too. People show their **preference towards products which offer quality, health, wellness, food safety, high quality service but also of Italian origin and respect for the environment**. For these products Italians agree to pay more. 4 million Italian people buy food online: the entry of Amazon in the food business is a prelude to the growth of the e-commerce channel.

TREND 1: HEALTH & FREE FROM

Products not only for celiac consumers (+32% gluten free products in 2015) and for consumers with food intolerance, but even for people who prefer healthy products, with a promise of wellness and without certain ingredients (for example lactose or palm oil), or vegan products.

BISCOTTI VEGAN GOCCE DI CIOCCOLATO GERMINAL BIO

Brand: Il Mangiarsano Spa

Launch date: 02/2015

Category: Grocery

Family: Biscuits

General description: The fragrance of a very good breakfast cookie with chocolate chips thanks to a fine recipe whose ingredients compose a delicate balance: sunflower oil for its nutritional properties; rice cream to make the shortcrust friable; germinated rice and seaweed to improve the dough. These cookies are a source of calcium which can be low in a vegan diet.

Why is this product a success? This product is a result of two years of research on the raw materials, in order to create new formulas and offer food with a high nutritional value. Vegan cookies are for consumers who want to modify their diet without changing their own food habits.





TREND 2: BIO & NATURAL

In this area we find not only organic products (+20% in 2015) but in general those made with natural, wholemeal or craft products.

LIEVITO MADRE INTEGRALE

Brand: Molino Rossetto Spa

Launch date: 09/2015

Category: Grocery

Family: Bread Making

General description: It's natural and the dry yeast is obtained from wholemeal flour which guarantees stability in the leavening and improves the product's taste and aroma. Perfect for both sweet and salt recipes, it's well-performing to prepare big leavened products and it offers a rustic and characteristic flavor. It's ideal for recipes based on stone ground wholemeal flour because it enhances the flavor.



Why is this product a success? It meets the needs of consumers who are looking for natural yeasts and of people who prefer a wholemeal diet, both for its unique taste and for its recognized nutritional properties.

TREND 3: SERVICE CONTENT

The wide range of products that mix quality, ease and speed in preparations, satisfying different kinds of opportunities of consumption and solving specific consumer needs.

FLAN DI VERDURE MAGIE DELLA NATURA

Brand: Valbona Srl

Launch date: 01/2015

Category: Fresh Products

Family: Ready Made Meals



General description: A range of six fresh vegetable flans (with spinach, tomatoes, peppers, artichokes, radicchio salad, mushrooms) ready to eat: 30 seconds in the microwave oven are enough. They are produced exclusively with natural and vegetable ingredients, are gluten free, low-calorie and high in fiber. Perfect as a side dish, but due to their smoothness they can also be used as ingredients and are appropriate for one-dish recipes.



Why is this product a success? Flans meet the modern consumers' need: no time to cook, a lookout for fresh and light food. They are meant for people who want to be chefs thanks to suggestions by chef Simone Rugiati. Valbona launched a range for children with Disney licensing.

NEW RETAIL CONCEPT



In the Future Food District at Expo Milan 2015, Coop has created the "Supermarket of the Future": a lab where many innovations have been tested in brand new "digital journey" terms, beginning from the "increased" informative labels which offer consumers a lot of interactive information about products and their environmental impact. Active during the Expo, the Coop Supermarket represented the most innovative developing line of retail for the next 3-5 years. More than one million people visited it.

OTHER MAJOR RETAILERS

The Supermarket chain **U2 (Unes Group)** introduced a perfect formula of everyday low price, based on moving away from special offers and investing in private labels. Huge success in December 2015 for the temporary shop "**Il Viaggiator Goloso**" in Milan. **Sapore di Mare** (D.I.Mar) is a chain specialized in deep frozen fish, whose characteristics and plus-point are a wide and rich-in-quality offer and the shop's layout, which is divided into 26 thematic areas focused on different dishes.

DO NOT MISS

Duomo Market (Duomo Place, Milan) is an excellent project by Autogrill which offers a café, a market, a bistrot, a lounge and a restaurant on three floors.

Fiorfood is the Coop's format opened in the heart of Turin, combining a grocery store, a restaurant and a bistrot on 3 levels.

Feltrinelli RED, a bookshop chain that combines traditional book selling and a restaurant in the same space: books shelves and tables are mixed together in a special layout.



JAPAN

By Koichiro TAKESHITA, *Shokuhin Shogyo*

RETAIL TRENDS

The year 2015 has been a remarkable year for retail business in Japan. Some symbolic new concept stores were opened. For example, Yaoko, which shows very good performance in retail business, opened "Lalaport Fujim Store". With the launch of this store, Yaoko tried to reinforce its delicatessen and bakery in order to deliver more health-conscious products to consumers. To give another example, Life Corporation, one of the largest Super Market Chain Stores in sales in Japan, opened a store in a completely new format, "Central Square Oshiage Ekimae Store".

CONSUMER TRENDS

According to professionals in the Japanese supermarket business, the current consumer behavior in shopping has created two bipolarized trends in Japan. They pointed out that not only luxury products, but also low price products have been selling well. On the other hand, the median price products have not recoded good sales despite Japan's long-term GDP growth. If we analyze this phenomenon, we can come up with two explanations. One is due to income disparity in Japanese society and the other is due to the fact that consumers often purchase both luxury and low price products.

TREND 1: HEALTH-CONSCIOUSNESS

Like other developed countries, Japanese society has been confronted with the serious challenge of an ageing population. People have become more interested in health today, especially in order to avoid being overweight. Calories and sugar have become "centers of interest" among almost all people in Japan and various nutrients feature among the hottest topics of discussion. Most people try to be careful with their calorie and sugar intake and hope to get good nutrients through good eating habits.

LOW CARBOHYDRATE NOODLES SERIES

Brand: EZAKI GLICO CO., LTD.

Launch date: 02/2016

Category: Frozen products

Family: Savory Frozen Products

General description: According to the EZAKI GLICO's own survey, one out of two people who often eat frozen Ramen noodles are very careful with carbohydrate rich foods. On the other hand, frozen noodles have features such as well-balanced ingredients and no preservatives. In addition, the "low-carbohydrate" food market is expanding in Japan.





Therefore, EZAKI GLICO took advantage of these features and developed a new type of frozen noodles which contains 40% lesser carbohydrate than ordinary noodles.

Why is this product a success? EZAKI GLICO uses special noodles with 40% less carbohydrate than average, including a large quantity of vegetables. This health-conscious product has very special features. This low carbohydrate noodles series can win over many potential loyal customers.

SWEETS DAYS NYUSANKIN CHOCOLAT (LACTIC ACID BACTERIA-CONTAINING)

Brand: LOTTE CO. LTD

Launch date: 10/2015

Category: Grocery

Family: Chocolate Products

General description: This product intends to create a new market by fusing health-conscious and tasty confectionery. Especially, health-conscious becomes the trend of whole foods. This product aims to get a firm position not only in the confectionery market, but also in the meal replacement market, by expanding its domain. Recently, people's life styles have changed dramatically. For example, the ritual of having breakfast has declined while taking supper just before going to bed seems to be on the rise. This product may fill these demands in response to our rapidly changing life style.



Why is this product a success? Lactic acid bacteria are weak in heat and in the presence of stomach acid. This product's innovativeness lies in raising the survival rate of lactic acid bacteria by a ratio of one hundred by wrapping them in chocolate. So, they can reach the bowels alive.

TREND 2: IMPORTANCE OF FUNCTIONALITY

People tend to pay more attention to the functionality of products. Needless to say, an additional function to a product gives delight to the people when they use it. We are living in a world where people have become much busier than before and convenience becomes a very important factor. People instinctively seek convenience products in order to save time.

SMILE BALL

Brand: House Foods Group Inc.

Launch date: 10/2015

Category: Fresh products

Family: Fruits/Vegetables



General description: When people start cutting an onion, tears come instantly to their eyes. However, this special onion which is called "Smile ball" does not cause people's eyes to water. The research group of House Foods Group Inc. discovered the mechanism that makes people cry because of onions. This mechanism appeared in Nature, international weekly journal of science in 2002. Later in 2012, they succeeded in producing an onion which didn't cause people's eyes to water. Moreover, this product was developed by a non-GMO technique.





Why is this product a success? Because Smile ball doesn't have any lachrymatory ingredients, people will not feel the pungency of onions when they eat it. They can however taste the strong sweetness which an onion originally has. Of course, convenience is a very important factor that explains why people like it too.

TREND 3: JAPANESE STYLE

Every day, Japanese people enjoy meals from different countries. Today, an average Japanese meal is often made by mixing various tastes. Many Japanese people may have started to forget the authentic Japanese meal. But this situation has been changing little by little. In 2013, Japanese food which is called "washoku" in Japanese was registered on the Representative List of the Intangible Cultural Heritage of Humanity. With the rising popularity of Japanese foods, people are once again taking interest in "Authentic Japanese taste".

YAWAMOCHI ICE (The Monoaka which tastes of green tea and smashed sweet bean paste)

Brand: Imuraya co. ltd.

Launch date: 03/2015

Category: Frozen products

Family: Ice Creams

General description: "Yawamochi" in Japanese means soft rice cake in English. The cup type of Yawamochi ice makes customers enjoy the harmony of rice cake, ice cream and smashed sweet bean paste. It was launched in the old days and already became popular. So Imuraya intended to improve their brand image by developing the Monaka style product which is a standard of Japanese style ice cream. "Monaka" is a kind of confectionery which is made of wafer.



Why is this product a success? The innovativeness of this product lies in combining ice cream and rice cake. This product adopts the characteristic rice cake which is still soft in the freezing environment. This product is very popular among all generations.

NEW RETAIL CONCEPT

Today, in Japan, the wall which between food retail and food service is disappearing. Some companies which operate in supermarket businesses opened characteristic stores. These stores reinforce delicatessen and bakery radically, and some of these companies provide "eat-in counters" in the store, encouraging customers to eat purchased foods. These stores look like restaurants. Since customers don't need to carry and cook, these stores are very innovative by their "ultimate convenience".



OTHER MAJOR RETAILERS

In Japan, people in retail business have shown a growing interest in smaller stores. We can point out two reasons. The first one is overstore: since the deregulation of opening new stores in 2000, many companies have opened too many stores. Consequently there is no room for larger stores to be opened and the number of customers is decreasing significantly. Only smaller stores can be commercially practicable. The second reason is Japan's depopulation: the population in residential areas has been declining gradually.

DO NOT MISS

The first store is the "Lalaport Fujim Store". In this store, Yaoko has successfully reinforced its delicatessen and bakery. The second store is Life Corporation's "Central Square Oshiage Ekimae Store", which reinforces delicatessen as well. The additional special feature of this store is creating a café space which is like a restaurant. The third store is "AEON Style itabashimaenochi" operated by AEON retail which is a member of the largest retail group in Japan, featuring a food-service style.



NETHERLANDS

By Tys HALLEMA, *Food Magazine*

RETAIL HIGHLIGHTS

A new player has entered the food retail market in The Netherlands. Picnic is an online-only supermarket and is completely new. It's not directly connected to an existing supermarket chain. The people behind Picnic are mostly IT-people and entrepreneurs who have launched new concepts (not in food retail) before. They guarantee the lowest price and free delivery. Picnic started in the city of Amersfoort and is planning to expand its market area city by city.

CONSUMER HIGHLIGHTS

The number of pick-up points for groceries and supermarkets that deliver groceries at home has grown rapidly in 2015. More and more consumers are now able to buy their groceries online. Some of the biggest supermarket chains in The Netherlands (Albert Heijn, Jumbo) are very busy with the online market.

TREND 1: GLOBALIZATION OF TRADE

Not so long ago, Holland was a very traditional country where spaghetti was seen as a very exotic product. These days the influences from abroad are more and more visible. All big supermarket chains have shops with pizza counters, fresh sushi, etc.

ARLA SKYR

Brand: Arla Foods

Launch date: 08/2015

Category: Fresh products

Family: Dairy Products

General description: Arla Skyr is the traditional Icelandic yoghurt-like product Skyr. Its introduction is an example of the globalization of food products. It's also daring to introduce a foreign dairy product in Holland, well known for its own dairy.

Why is this product a success? Arla Skyr adds value to the dairy category. It is a healthy alternative to the traditional Dutch yoghurt & cottage cheese products. It has a high margin for retailers and was distributed last year to all major food retailers.





TREND 2: HARD DISCOUNT

The market is increasingly divided into two segments: top and discount. The 'middle of the market' is disappearing. Retailers make the decision to focus on low prices, or choose to distinguish themselves with top quality products.

MELKUNIE KOEKVLA

Brand: Arla Foods

Launch date: 11/2014

Category: Fresh Products

Family: Dairy Products

General description: Vla is a typical Dutch product, which could be described as custard or pudding in English, but is thinner than those products. Melkunie Koekvla is vla with small cookies within. It's available in several varieties, for example with stroopwafel.

Why is this product a success? It adds depth to the fresh desserts category. The traditional Dutch vla varieties are for example vanilla and chocolate, but these are totally new tastes. Market research has shown that Melkunie Koekvla generates additional sales.



TREND 3: HEALTH

Dutch consumers are increasingly seeking healthy products. Retailers and food producers respond to this demand with products without added sugar, without fat, etc.

Kwekkeboom Oven

Brand: Royaan

Launch date: 11/2014

Category: Frozen Products

Family: Savory Frozen products



General description: Kwekkeboom Oven is a range of popular Dutch snacks, for example the kroket. This is a typical Dutch snack product, very popular all over the country (also loved by tourists). The difference between normal snacks and this one is that's it's not deep fried, but heated in the oven. In 2015 it was chosen as the best new product in The Netherlands (The Wheel of Retail selection)



Why is this product a success? Normally these products (kroket, bitterbal, chicken nuggets, etc.) are unhealthy because they are deep fried but this product contains much less fat because it's oven-heated. By mid-2015, 76% of Dutch food retailers had Kwekkeboom Oven already in their assortment.



NEW RETAIL CONCEPT

Market leader Albert Heijn opened a concept store in 2015, in Eindhoven. It's one of the biggest supermarkets in the country. Here Albert Heijn tests all kinds of new concepts (ways of presenting products, assortment, a market place where local entrepreneurs can promote their products). Some of the ideas from this supermarket have already been replicated by other Albert Heijn shops.

OTHER MAJOR RETAILERS

-Jumbo (the second market leader in The Netherlands) started in 2013 with its first Jumbo Food market, a hypermarket concept. In 2015 it opened the 3rd such market in its hometown Veghel. In this supermarket customers can 'pick-and-mix' all through the shop: small breads, tomatoes, potatoes, nuts, M&M's, etc.

- Albert Heijn has a self scan only store in Amsterdam.

DO NOT MISS

-Valk Versmarkt. The Dutch hotel entrepreneurs' family Van der Valk has a fresh food store in Voorschoten. Here they sell mainly fresh food (although there is a little section for other groceries). Especially the meat that they sell is excellent.

-Jumbo Foodmarket Veghel (see above for the explanation)

-Albert Heijn XL Eindhoven (see above for the explanation)

NEW ZEALAND

By Tania Walters, SupermarketNews



RETAIL TRENDS

Marked by a substantial duopoly between Foodstuffs and Progressive Enterprises and dotted with independent high-end chains the New Zealand market is locked in a fierce neck-and-neck race between the major chains. 2015 marked an increase in the number of store openings, but locations are becoming scarce. Health and convenience continue to trend upwards. Over the past year local artisanal ranges trended particularly in convenience. Cross-pollination of brands is an interesting new trend with several new product collaborations launched.

CONSUMER TRENDS

Health and convenience are still trending with sustainability and country of origin is gaining importance. Consumer demand for “free from” products increases with particular emphasis on sugar reduction. Change in shopping habits, from one big shopping spree to more frequent visits and smaller basket sizes. All retail players are supporting plastic bags reduction with reusable bags. Major chains use fashion designers/artists to produce limited edition bags. Both major chains are now offering online shopping with limited click and collect options. Beeswax food wraps as a substitute for cling film is a small but growing area of interest due to increasing consumer demand for products that meet sustainability criteria.

TREND 1: CROSS-POLLINATION

Cross-pollination of brands was another interesting trend, which saw leading FMCG companies teaming up to create new products and flavors. The two most successful launches in 2015 were Whittaker's Artisan Range and Lewis Road Creamery Chocolate Milk.

LEWIS ROAD CREAMERY FRESH CHOCOLATE

Brand: Lewis Road Creamery

Launch date: 11/2014

Category: Grocery

Family: Milk



General description: A quality raw ingredient combination of great milk and New Zealand's favourite Whittaker's chocolate resulted in Lewis Road Creamery Chocolate Milk. The cross-pollination of these two brands has been an outstanding success story in New Zealand. At launch, the product sold out resulting in a limit per customer and frenzied buying, "a milk mania". Carries Oritain mark to prove authenticity & origin. Smashed sales targets, gained 55% of market share and reinvigorated what was a stagnant category.

Why is this product a success? The originality of joining these two products that are individually made from the very best ingredients creates something truly special in a recyclable bottle designed to pay tribute to a time when milk was "real" and milk bottles a part of Kiwi life.



TREND 2: ARTISAN



Artisanal products are gaining real traction on New Zealand supermarket shelves. Two examples show the spectrum of product variety. Little Beauties air dried Fejoia slices give this fruit extended usage, the drying process is a world first for this unique flavour. While Huffman's sauces tapped into the growing hot sauce market which has exploded driven by consumer demand.

HUFFMAN'S CRAFTY SAUCES

Brand: Huffman's Crafty Sauces

Launch date: 09/2015

Category: Grocery

Family: Condiments and sauces

General description: Huffmans Original Chilli Pepper Not-Too-Hot Sauce is a robust blend of sun ripened sweet peppers, distilled white vinegar, pure sea salt imbued with warm red chillies and smoked Spanish Paprika. Original recipe crafted with local ingredients where possible. Winner World Champion Pepper Blend in World Hot Sauce Awards 2015. Finalist NZ Food Awards.

Why is this product a success? Market explosion for hot sauce in 2015 saw Huffman's take a strong position on the shelf. Reusable bespoke bottles, optimized for shelf placement, artisanal processes & natural ingredients have seen this brand achieve from launch 30% growth month on month.



TREND 3: LOCALLY SOURCED

Locally sourced ingredients have trended in 2015 with many successful launches. Artisanal local soda syrups boomed in 2015 and Soda Press is an excellent example of this trend.

The variety of locally sourced products is growing, from Homemade Dumplings to sodas, jams and sauces. These brands use locally sourced ingredients, sustainable practices and have a clear origin path.

SODA PRESS CO RANGE OF SODA SYRUPS

Brand: The Soda Press Co

Launch date: 11/2015

Category: Beverages

Family: Soft Drink

General description: A modern day artisan low sugar syrup that uses the best of old and new production techniques. These organic and natural syrups are designed to expand healthier and sustainable syrup consumption in Soda Machines, Hot/Cold water drinks, cocktails, mixers, flavored ice blocks and slushies. Natural ingredients, low sugar (30-40% less) no artificial sweeteners and no added chemicals. They are made to taste like delicious homemade syrups.





Why is this product a success? Local artisanal products with focus on natural ingredients, low sugar, no additives, broad appeal. Sustainable bottle made from 98% recycled material. Authentic brand story of a premium product.

NEW RETAIL CONCEPT

New in 2015 was the introduction of sushi counters in supermarkets. Deli offerings continued to grow and cheese varieties increased. Instore pharmacies are increasing. Underground parking is being incorporated in new stores because of urban land constraints.

OTHER RETAILERS

Gourmet/Specialty grocers are becoming more and more popular with consumers. Stores like “Good NZ Grocer” have opened recently and “Faro” and “Nosh” banners continue to extend their reach in the market with consumers liking the “farmers market” style of shopping, even though the prices are higher than supermarkets. These stores carry a more expensive and exclusive product range.

DO NOT MISS

1. Faro Fresh, Lunn Avenue. Excellent example of an independent store providing a targeted range of local and artisanal products. Fresh convenience foods are well displayed,
2. Countdown Queenstown, beautifully sited with excellent range for resort town.
3. New World Victoria Park Auckland, extensive deli range, state of the art bakery, fresh seafood and top quality cuts of meat butchered in-store daily. Probably the most photographed and visited store by industry and overseas visitors.



NORWAY

By Reidar MOLTHE, *Dagligvarehandelen*

RETAIL TRENDS

In 2015 we went from four to three main players in the Norwegian market. This is the greatest change we have seen in a long time. Ica and Rimi will disappear as concept chains and the remaining players are NorgesGruppen (40%), Coop (34%) and Rema 1000 (24%). One would think that with three players instead of four the price competition would be milder. The opposite has actually happened: the price war is stiffer than ever.

CONSUMER TRENDS

We see four main consumer trends. These are convenience, health, local and ecological food. The mega trend of natural and healthy food continues. Commodities with premium quality, often sourced locally, from a nearby farm, are something customers appreciate. Production should be sustainable throughout the value chain and as natural as possible. Microwave is out. High quality is no longer just for food snobs. Customers want the best of all worlds. Cheap, convenient and smart.

TREND 1: PRICE WAR

Price war is the most notable trend in the market. It also increases the discount store's selection. Kiwi, Rema 1000, Coop Extra are now focusing more on fresh foods and typical weekend products. Discount stores are competing more and harder with the supermarkets.

Lerøy Bredes Fresh Fish

Brand: Lerøy

Launch date: 01/2015

Category: Fresh products

Family: Fish and seafood



General description: Lerøy breaded products are tasty and healthy. They have become a favorite among many families with children. This crispy and tasty dish can be served as dinner as well as a snack.

Why is this product a success? We want to eat healthy and we want to add more fish to our diet. It is convenient, it is local and it is natural.

TREND 2: HEALTH

Health is a key trend. Fruit, vegetables and fish are increasing and even the low price chains now sell a lot of fresh packed fish.

SALMARAW

Brand: Salmaraw

Launch date: 01/2015

Category: Fresh products



Family: Fish and seafood

General description: SALMARAW is a ready to go sashimikit which contains fresh SALMA sashimi, ponzusauce, toasted sesame seeds and a specially designed eating utensil. The whole thing is packed in a container which makes it easy to eat on the go.



Why is this product a success? During the entire development, the focus was on the product: how it could be enjoyed in many different situations and how to make SALMA and fresh salmon available "on the go". In addition Salmarow opens up for sales in new channels where fish are underrepresented.

TREND 3: LOCAL FOOD

- The willingness to pay for local and Norwegian food is increasing significantly. Norwegian production of agricultural products is important to more and more people.
- Due to the popularity of the low carb diet the fear of fat has diminished.

Jæren Smak Ribbe

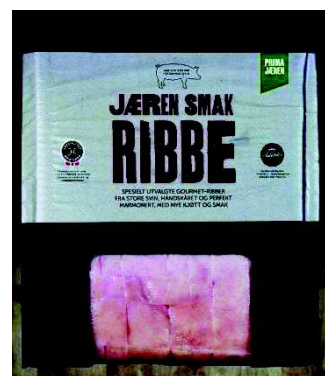
Brand: Prima Jæren

Launch date: 09/2015

Category: Frozen products

Family: Savory Frozen Products

General description: Based on the culinary traditions of Jæren, JÆREN SMAK is the result of a collaboration in meat production, from farmer to consumer. Determined to improve the quality and taste experience of Norwegian meat. Selected farms - no more than one hour drive from the Prima Jæren production facilities, are certified for production of JÆREN SMAK pork. JÆREN SMAK Traditional Pork Belly is the only product of its kind in Norway which has been designated Matmerk Specialty—Unique flavor.



Why is this product a success? JÆREN SMAK pigs are bred on the basis of its premium flavor. The animals have approximately 15% higher slaughter-weight than standard pork and the meat contains more marbled fat. This makes the meat optimal for processed products. The meat is also far more tasty than normal ribs.



TREND 3: LOCAL FOOD

Klippfisk til Bacalao

Brand: Klippfisk til Bacalao

Launch date: September 2015

Category: Salted and dried products

Family: Fish and seafood



General Description: The product “Klippfisk til Bacalao” is in short 400 grams of handcraft tradition of making salted and dried clipfish adapted to the modern consumers’ market. It is all about identity. At the factory, Dybvik Clipfish gets its unique texture and taste that has made it popular and famous around the world. Klippfisk til Bacalao is delicately wrapped in 400 gram bags. Rapid desalting with only six hours in water. Custom-made for smaller households, but still a reasonable dinner option for 2 adults and 2 children.

Sales have exceeded all expectations and more than doubled the budget. The product’s commercial success has contributed to a board decision to design and launch the product in the European market.

NEW RETAIL CONCEPT

The newest is the E-trade concept www.marked.no because of the new pick and distribution system. There are several other interesting E-Trade concepts: www.kolonial.no, www.adamsmatkasse.no, www.rethjem.no, www.godt levert.no

DO NOT MISS

Meny CC Vest, a very good store, the biggest and most profitable supermarket in Norway.

Rema 1000, Signaturgården, Bekkestua. The store of the year in Rema 1000, 2015.

Kiwi XL, Åssiden, Drammen, a new and modern Kiwi concept.

Mega, Madla, Sandnes - Highest turnover in the chain, high profitability, high knowledge in all departments; a food temple with great promotions and inspirational activities.

POLAND

By Barbara MIKUSINSKA-OZDOBINSKA, *Handel*



RETAIL TRENDS

Discount stores have become similar to supermarkets. They have expanded their product assortments – especially by adding fresh products (dairy, bread, refrigerated fresh produce), ready-to-eat, healthy, organic, etc. but also branded products. The stores have started baking their own bread. On the other hand, supermarkets have decreased their product assortments; they have introduced more private label products, and have more promotions and price discounts. Their biggest strategic focus is on fresh products.

CONSUMER TRENDS

Prices are important, but quickness and comfort of the shopping experience become the most important aspects for customers. Local grocery stores are more popular than hypermarkets which require commuting by car or public transport. Fresh, healthy, ready-to-eat, quick and easy-to-prepare products are increasingly popular.

TREND 1: CONVENIENCE

Ready-to-eat and food-to-go products are expanding and noticing growing popularity. They appear in categories such as soups, salads, drinks, vegetables and fruits, refrigerated and frozen products. It is the answer to busy lifestyles.

MAKARON NA PATELNIIE

Brand: Hortex

Launch date: 11/2014

Category: Frozen products

Family: Savory frozen products



General description: Stir-fry pasta: frozen pasta, vegetables, sauce/meat with or without meat. Contain no preservatives, artificial colors, saturated fats or flavor enhancements. A variety of five different flavors. Quick (10 min) and easy to prepare.

Why is this product a success? An innovative product - frozen pasta, a new product segment in frozen food. This is a new line in the popular stir-fry category. Product - ready to eat - is the answer to busy lifestyles.

TREND 2: LOCAL FLAVORS

Apart from popular products typical to international cuisine, stores feature more and more branded local Polish products. Especially in the category of packaged cold cuts (no names before). As a result of Russian embargo on the import of Polish apples, Polish fruits and fruit products have become more popular.

CYDR LUBELSKI

Brand: Ambra S.A.

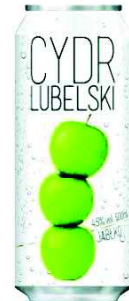
Launch date: 06/2015

Category: Beverages

Family: Beers / Ciders

General description: Apple cider, 0.5-litre can (4.5% alcohol). The product is from the Lublin region, which is one of the largest apple-producing regions in Poland.

Why is this product a success? Cydr Lubelski is a leader in its product category in Poland. It has set a new trend on the alcohol market. It's the first mass produced cider. It was introduced in glass bottles on the market in 2013 (Russian embargo on Polish apples). A modern design of the packaging (can) underlines the product's freshness and novelty.



TREND 3: PROTEIN SOURCES

In the beginning protein sources products were available for purchase in places where people came to play sports. These days they are sold in grocery stores. New products with high protein content are introduced in such categories as yoghurt and drinks. The manufacturers usually target their products at men.

BAKOMA MEN

Brand: Bakoma

Launch date: 02/2015

Category: Fresh products

Family: Dairy products



General description: High protein yoghurt - contains 8% of protein. Two products in the line: 200 g (cup), three fruit flavors and 230 g to drink (bottle) - natural yoghurt and two fruit flavors.



Why is this product a success? Targeted at fit and active men, bodybuilders. It helps to maintain healthy bones (contains calcium and active yoghurt bacteria). Black packaging with a visible word "Men" points at its main target group and makes it stand out on a store shelf.

NEW RETAIL CONCEPT

Co-op "Dobrze" in Warsaw. It's not a new retail format but a completely new approach to selling and buying. Young people from major Polish cities want to know where exactly the food they eat comes from and how, where and what it is made of. They set up a cooperative, which at this point has a membership of 150 families, and they opened a grocery store which offers vegetables, fruits and healthy food directly from 20 suppliers. Co-op members work in the store without pay.

OTHER MAJOR RETAILERS

A new model of Biedronka discount store has elements commonly featured in supermarkets and delis. An innovative idea on the Polish market, they introduced lines of fresh products, fresh and frozen ready-to-eat meals, meats and dairy under their private label brands. Their assortment of branded products is wider compared to other discount stores. The branded products (with the producer's logo on a newly designed packaging) are being manufactured exclusively for this store chain.

DO NOT MISS

Biedronka - the concept is present only on the Polish market. It belongs to a Portuguese company Jeronimo Martins.

Freshmarket - a chain of convenience stores. Fast developing in major Polish cities. Belongs to Zabka company.

Lewiatan - an example of the "Polish phenomenon". A chain of franchise stores founded by a group of Polish retailers, similar to other chains like: Chata Polska, Nasz Sklep, etc. 25,000 stores are members of franchise grocery stores chains.





PORTUGAL

By Filipe GIL, *Distribuição Hoje*

RETAIL TRENDS

Promotions, promotions and more promotions. Portuguese retail is making a strong pitch on sales and market share. Retail brands are witnessing decreasing sales, on the other hand the industry brands are seeing increasing sales, especially with promotions. Retailers are putting some efforts on e-commerce sales, but this is still not “booming”.

CONSUMER TRENDS

“Promo-addicted”. The Portuguese consumer buys, mostly, promotion items. Promotions cut across categories. Despite that, consumers are on the lookout for new experiences, for more healthy food and “free from” products.

TREND 1: NEW EXPERIENCES

Portuguese consumers are looking for new experiences in food. For several years they were a bit conservative regarding new flavors. There is a lot of diversity in Portuguese food, but now they are discovering new options. Some creative, some experimental.

VINAGRE DE TOMATE

Brand: Mendes Gonçalves /Paladin

Launch date: 03/2015

Category: Grocery

Family: Oils and Vinegars

General description: Tomato Vinegar is a real example of PALADIN’s mission as it adds value to the best Portuguese agricultural products and processes them before they reach the consumer accompanied by a modern image and an inspiring message. PALADIN presents the only vinegar in the world made from excellent raw materials: Portuguese tomatoes.

Why is this product a success? The result is a product of excellence which leaves the Portuguese feeling proud of the best that is made in their country. An extremely aromatic vinegar which not only blends perfectly with a tomato salad but also heightens its taste.





TREND 2: FREE FROM

Free from gluten, free from sugar, free from lactose. The food retail market in Portugal is being taken over by several options for products without gluten or lactose.

ZERO% LACTOSE

Brand: UCAL/Zero% Lactose

Launch date: 12/2015

Category: Fresh Products

Family: Dairy Products

General description: Launched in the Portuguese market in late 2015, UCAL ZERO% Lactose follows the same recipe as the best selling successful chocolate milk in the Portuguese market. Despite the late release, it is doing very well in sales.



Why is this product a success? They have changed the recipe for Lactose intolerant consumers by breaking it into more simple sugars in the milk.

TREND 3: HEALTHY FOOD

Portuguese consumers are more into healthy products.

OLIVEIRINHA

Brand: Grupo Sovena/ Oliveira da Serra

Launch date: 04/2015

Category: Grocery

Family: Oils and vinegars

Sub-family: Olive Oil

General description: Olive oil made for children. With 0.3% bitterness, this virgin olive oil is very a sweet and delicate product made with a special kind of olive.

Why is this product a success? This olive oil follows the trend of giving proper and healthy nutrition for infants and children.



NEW RETAIL CONCEPT

Food retail is banking on having a typical market-food environment in their hypermarkets. Fresh food is the option that Pingo Doce Telheiras (Jerónimo Martins Group) or Continente Matosinhos (Sonae Group) have chosen. Some shops are selling products in a bulk-buying system like Jumbo Sintra (Auchan Group). And of course, still on but not new, is the convenience trend. Everybody wants to be near the costumer.



OTHER MAJOR RETAILERS

Intermarché is also banking on fresh products made locally and Minipreço Dia is opening more stores in the city center. Also “Amanhecer” from Jeronimo Martins Group and “Meu Super” from Sonae MC are changing the traditional market and supporting young and old entrepreneurs to modernize their local small stores.

DO NOT MISS

Mercado da Ribeira (Time Out) and Mercado de Campo de Ourique, the new Pingo Doce store in Telheiras (Lisbon) and the new Continente hypermarket in Matosinhos (Porto) and Jumbo Sintra.



RUSSIA

By Inga LOBZHANIDZE, *Moye delo Magazin*

RETAIL TRENDS

In Russia the price of food has risen considerably because of the decrease in the exchange-value of the ruble, the sanctions and the embargo. According to official data (Rosstat) food inflation in 2015 in Russia was 14%. According to unofficial data (different sources) it was more than 20%. The retail trade turnover fell 10% (Rosstat) in 2015. The like-for-like sales increase was shown by discount stores.

CONSUMER TRENDS

The majority of Russians tried to save money in 2015 and this trend will continue in 2016. 72% of population cut down expenses on food. 33% of Russians refused to buy delicacies, fine food (Romir). 48% switched over to cheaper brands (Nielsen). In addition Russians would like to buy healthy food but 85% of them think that it is too expensive (Nielsen).

TREND 1: HARD DISCOUNT

The main trend in Russia is the saving money. 55% of Russians said that they started to save money because of the price increase. So now the best retail segment is discounters. Private labels in Russia developed considerably (especially in the low price segment). Since December 2014 sales of private labels have increased by 30%.

WALNUT JAM

Brand: SiSnatural/FruityBeauty

Launch date: 02/2014

Category: Grocery

Family: Jams / Fruits in syrup / Spreads

General description: In ancient times walnut was a symbol of fertility and abundance, this nut is really endowed with useful properties for feminine beauty and body.

"Fruity Beauty" walnut jam is in a hurry to reveal all its secrets of wonderful fruit, which were available only to a chosen few in ancient times.

Why is this product a success? The Fruity Beauty Company has carefully studied the behavior of its customers and has concluded that most important to them, when choosing canned sweets and jams - is a chance to pamper themselves and take their own little holiday.





TREND 2: NATIONAL FOOD PRODUCTS

Due to the embargo and sanctions Russians lost the possibility of buying a lot of European products. Besides because of the fall of the ruble the price of imported goods became too high. As a result, Russians turned to national food products. Recently Russian marble beef and Siberian fish have appeared on the market. People are interested in Russian wine, etc.

QUARK DRINK

Brand: Vitamilka

Launch date: 12/2014

Category: Fresh products

Family: Dairy Products

General description: High-protein quark drink is an innovative product. There are no analogues on the world market. It contains as much protein as usual quark which is eaten with a spoon, but due to ultrafiltration technology, quark gets drinkable consistencies

Why is this product a success? Protein content is at least 7%. It contains many Lactobacillales. There are no artificial flavors, color additives or preservatives. All the benefits of milk are preserved. Excellent taste: soft consistency, low acidity.



TREND 3: NATURAL FOOD

Russians are interested in healthy food but 85% of them think that it is too expensive. In big cities there is intense interest in farm products. Consumers want to eat natural foods without artificial additives but for the normal price. For example sales of cottage cheese increased by 50% over the past three years.

YELLI BRAND

Brand: LLC Torgovy Dom Yarmarka

Launch date: 10/2014

Category: Grocery

Family: Cereals



General description: Yelli are products blends, made of natural eye-seen ingredients, for home-made soups. Yelli is a mindful product for people who care for natural and healthy food. It is a high quality product that has great taste and comes in exotic flavors. It is healthy and delicious at the same time.

Why is this product a success? It is easy to cook and takes little time to prepare. Also tasty, healthy, and made from traditional popular dishes from different countries. Suitable for vegetarians and vegans.





NEW RETAIL CONCEPT

The first club market Smartory has appeared recently.

There is an interesting chain of convenience stores Azbuka Daily.

OTHER MAJOR RETAILERS

Bahetle: It is from the Tatar chain of supermarkets with a big market share of prepared national food.

DO NOT MISS

Magnit: The market leader, this chain of discounters came up in Southern Russia and became the first-of-its kind in the country.

Azbuka Daily: It is a chain of convenience stores with a very good range of packed prepared food.



SOUTH AFRICA

By Maryke FOULDS, *Food Review*

RETAIL TRENDS

Retail-ready packaging is set to increase in South Africa as more discount stores open. The use of these packs is driven by their ability to help consumers identify products on shelf with greater ease. Retailers also benefit from reduced labor costs as retail-ready packaging can be packed on shelves faster, reducing the amount of employees needed to stock stores.

CONSUMER TRENDS

The trend towards free-from products gained a lot of momentum during the year. South African consumers are hungry for healthier products and the food and beverage manufacturing industry has taken up the challenge to deliver such products. The development of lactose and gluten-free products; the use of natural colors and flavors; stevia in beverage formulations as well as low carb options in ready meals and the convenience food segment are all gaining traction. It is all about health this year.

TREND 1: NATURAL AND PRESERVATIVE FREE PRODUCTS

KWV has launched the world's first "natural" pinotage, with no added sulphites or preservatives. The wine is made using a revolutionary patented process, which marries two uniquely South African winemaking ingredients: Rooibos and Honeybush wood. The ingredients are known for their anti-oxidant properties. This product is perfect for consumers looking for products that are more natural, and contain fewer preservatives. An innovative first for South Africa.

EARTH's ESSENCE

Brand: KWV

Launch date: 01/2015

Category: Beverages

Family: Wines



General description: Earth's Essence Pinotage wine has no sulphites or added preservatives. This is made possible by using a world first: a revolutionary technological process that uses indigenous Rooibos and Honeybush wood during the winemaking process. The patented process blends two ingredients renowned for their anti-oxidant properties. The wine is innovative, authentic, natural and sustainable and negates the use of added sulphites or preservatives.

Why is this product a success? In South Africa there is a growing trend of consumers searching for products that are more natural and contain less preservatives. This wine is a perfect fit for the health conscious but discerning consumer.





TREND 2: SNACKIFICATION

BEETROOT CRISPS SEA SALT & BLACK PEPPER

Brand: Woolworths

Launch date: 03/2015

Category: Grocery

Family: STARCHES, PASTA, RICE

General description: This product is a healthier snacking alternative with 50% less fat than ordinary crisps. It is made from beetroot sourced from local farms and fried in small batches using a unique patented process to lock in flavor, color and crunch. In South Africa, this product has revised a stagnating snacks category with a healthier, great tasting offering. The product is the first of its kind to market.



Thin slices of earthy beetroot are baked to lock in flavor and natural taste. The product is fried in small batches, using a patented process to lock in flavor and color and to deliver a crisp crunch. A light seasoning of sea salt and black pepper enhances the beetroot crisps' rich, earthy, sweet flavor.

Why is this product a success? The product offers 50% less fat than ordinary crisps. It is also high in fiber, making it a healthier snack alternative. The product is doing exceptionally well in this category.

TREND 3: SEED BASED PRODUCTS

The NuSeed range of seed based snacks offers a healthy snack alternative or salad and cereal toppers. The product is dry roasted without oil and offers a host of functional benefits. The range consists of Canadian Blueberry and Cranberry Melange; Seeds and Calamata Olives; Turkish Fig & Date; Balsamic Vinegar and Himalayan Salt, Belgian Chocolate with Berries; Seeds and Nuts and Soy infused roasted seeds. These products are perfect for boosting nutrient intake in the better-for-you category.

NUSEED RANGE

Brand: NuSeed

Launch date: 02/2015

Category: Grocery

Family: Dietary supplements and complements



General description: The NuSeed range of seed based snacks offers a convenient alternative to snacking for people who want to start making a healthy lifestyle change without compromising on taste. The range consists of seven different products: Seeds and Nuts with Canadian Blueberry and Cranberry Melange; Roasted seeds and Calamata Olives; Turkish Fig and Date with Seeds and Nuts; Roasted Seeds with Balsamic Vinegar and Himalayan Salt; Belgian Chocolate with Berries; Seeds and Nuts, and Soy Infused Roasted Seeds.

Why is this product a success? The ingredients are dry roasted without oil to ensure optimal nutritional values. Seed-based snacks are ideal for boosting intake of nutrients. Conveniently packed in portion controlled 30g packs. These good fats soothe cravings and stop overeating.



NEW RETAIL CONCEPT

Pop-up stores and food markets are a big trend in South Africa at the moment. The pop-up store normally only occupies a retail space for three months. While these branded products are found on retail shelves, the pop-up features a different and limited range of products to consumers. Food markets are a big trend in South Africa and feed into consumer needs for fresh, local and organic products. It is very trendy and vibey and features a wide variety of high quality products.

OTHER MAJOR RETAILERS

The Fresh Earth bakery and wholefood store has been around for a while. The recent addition of their free-from bakery is very exciting. They not only supply their innovative products directly to the customer, but also to supermarkets and retailers.

DO NOT MISS

Woolworths – offering excellent quality, local products, the company is striving to be green and they have a number of initiatives that work towards the common good of the country. They strive towards carbon efficiency and sustainable products.

Checkers - the retailer has an affordable and wide variety of cheese and wine, which is affordable. This broadens the scope of these products to everyone.

Clicks - they have introduced a range of health and gluten-free food products on their shelves.



SOUTH KOREA

By Seonhui GIM, *The Buyer*

RETAIL TRENDS

Hypermarkets became innovative to create a unique experience for consumers. More and more grocery stores are opening; and omni-channel and mobile market are growing.

CONSUMER TRENDS

Online and mobile shopping are booming. Consumers like experiencing new things. They seek for healthy, delicious and easy to cook products.

TREND 1: FOOD MATERIAL

This year, one of the food trends was **functional food** as people prefer **healthy food**. In particular healthy products that use domestic food **raw materials** like ginseng or goji.

Black Choco Crunch

Brand: Geumheuk

Launch date: 09/2015

Category: Grocery

Family: Biscuits



General description: Black ginseng is high-quality food wherein ginseng is dried and steamed nine times. Black Choco Crunch uses healthy food material. Made with Korean brown rice and 1% of GAP-certified Kujeungkupo black ginseng powder, its crunch texture and savory flavor are loved by all age groups.

Why is this product a success? Firstly it uses a small package, it's the best thing for consumers as they can easily eat. Secondly usually ginseng tastes bitter. But putting chocolate in it makes it delicious. At last, it is a crunchy nutritional 'snack' with black ginseng.

TREND 2: PROMOTING THE MARKET ZONES

The South Korean population is about 52 millions and out of these, there are about 45 million people using a smartphone and they might have one SNS account or more than that. They follow famous celebrities or upload their daily activities. After that other people watch it, similarly the SNS can also be used to purchase products. **So most Korean companies are now doing SNS marketing.** It is a new way to expand the market share of new products in Korea.

WORLD TOUR 2016

HONEY BUTTER CHIP

Brand: HAITAI-Calbee

Launch date: 08/2014

Category: Grocery

Family: Biscuits



General description: With its sweet and salty taste, Honey butter chip suits perfectly the taste of young people.

Why is this product a success? Honey butter chip started to be known as chips liked by celebrities thanks to Instagram. As a result, even the people who didn't know about Honey butter chip, started to be curious about its taste. It gained much more popularity than other chips. As a result it's sold everywhere!



TREND 3: TRADITIONAL & RENOVATION

Tradition has become high-class. It focuses on food material and packaging is also luxurious. In particular, Korean traditional liquor has been presented with a new look. Korean traditional liquors have been represented with characteristic fragrances and distinct stories.

ANDONG

Brand: Hemosu

Launch date: 10/2015

Category: Beverages

Family: Alcoholic Beverages, Appetizers

General description: "Embrace master's dignity." Produced from 500 years of master's tradition. Natural bedrock water from 270 m underground and 100% Korean rice makes for a pure and delicate scent and leaves an aftertaste for a long time.

The initial feeling is of a tangy flavor with a strong grain, and the final feeling is bright and soft with an aroma of pears. Despite its high alcohol content, it is smooth. Its natural flavors stand out.

Why is this product a success? Andong has a history. It has been handed down to 25 generations of the Park family in the Andong regions. And high-class packaging in Korea is a recent trend. Also Andong is being globalized because people prefer this product due to its "clean and refreshing taste".





NEW RETAIL CONCEPT

In South Korea, online products cannot be exchanged in the store, even if it was made the same company. But omni channel has made this possible. Also the product can be delivered, after shopping at the store. Or you can get it from the store after purchasing the product through a mobile phone. In the case of the mobile market, even teenagers have their own smartphones, so it shows the high market share of the mobile market..

DO NOT MISS

Emart town, Ilsan. That is the first complex mart for experience and entertainment in South Korea.

Hyundai department store, Pangyo. It has the largest grocery in our country. Department stores mainly sell fashion items, but Pangyo hyundai department store focuses on food.

Orga Whole Foods, Bangi. It is an eco-friendly specialty store for enhancing the value of food materials.



SPAIN

By Jaime DE HARO REQUENA, *Distribucion Actualidad*

RETAIL TRENDS

Rise of franchising and fresh produce battle. At the same time as the increase in demand for healthy products, small local supermarkets and convenience stores, mostly franchised, are growing in Spain with GRUPO DIA, Carrefour, Eroski and Caprabo being the most active retailers focusing on fresh produce. The regional chains are more active showing sustained growth, while all the distribution groups maintain a strong competition in the fresh produce segment from which Lidl is generating 33% of their sales.

CONSUMER TRENDS

Multi-device and multi-channel buying - 80% of the population of Spain has a smartphone and 3 million Spaniards use a mobile phone or tablet to buy online. E-commerce in Consumer Products (CP) is growing faster than the off line market. A 12% increase in online sales of CP compared to 2% growth in sales in the traditional brick and mortar store. Ready-to-eat food e-commerce companies with home or office delivery are also growing.

TREND 1: HEALTHY FOOD

The trend towards consumption of products which are good for one's health is growing in Spain. Fresh and healthy products are what the supermarket and hypermarket chains are aiming to offer soon. At the same time the consumption of local produce and the awareness of the social responsibility of producers and of food waste is growing. Ways of preparing food such as grilling or boiling are increasingly used.

DIA BALANCE

Brand: Calidad pascual

Launch date: 11/2014

Category: Fresh products

Family: Dairy Products



General description: Product range to control glucose for diabetic patients. Ranging from bread to pasta, snacks, smoothies, chocolate bars and dairy desserts. This collaboration between dairy food producer Calidad Pascual and Esteve pharmaceutical laboratories has developed a wide range of tasty products.



Why is this product a success? They spotted a major health issue in Spain as diabetic customers had to give up taste for health. These products have the quality and taste of the number 1 Spanish dairy company and a specialized laboratory. www.diabalance.com



TREND 2: TIME AND CONVENIENCE

Increased demand for ready meals and specialties with a growing interest in foreign food. Easier and more local food, where innovation and sustainability are increasing, driven by technology. The growing importance of organic production, 0 Km, local or fair trade. At the same time, there is a growing taste for market cuisine as recreation and as an experience, with a demand for information on the origin of the ingredients used, how they are used and the benefits they provide.

PESCANOVA BY KABUKI

Brand: Pescanova

Launch date: 04/2015

Category: Grocery

Family: Shelf Stable Ready Meals (preserved dried)

General description: New gastronomy concept from the alliance of Pescanova fishing co and Kabuki restaurant enterprises. The product can be purchased online and delivered home with easy preparation instructions to be prepared as befitting an expert chef. Offers a wide variety of sashimis, tartars, nigiris, makis, futomakis.



Why is this product a success? Time, convenience and the experience of having a 3 Michelin star designed product at home.

TREND 3: EUROPEANIZATION OF HABITS AND EATING TIMES

As the financial crisis wanes, the apparently unstoppable rise of distributors' own brands ended in 2015, and that trend will continue this year. At the same time, lifestyles are changing, and we can see their influence on consumption. Breakfast is eaten earlier, other, complementary types of foods are emerging and different times of day for eating are emerging. More, smaller and earlier meals. A trend towards the "Europeanization" of Spanish habits which is bound to grow.

WINTER GASPACHO

Brand: Biosabor

Launch date: 09/2015

Category: Grocery

Family: Soups

General description: Organic production. Cold soup traditional Andalusian, crafted with fresh vegetables and extra virgin olive oil. Without losing the essence of Gazpacho contains seasonal vegetables that raise the nutritional potential of gazpacho. Preservation by pasteurization.

<http://www.biosabor.com/producto/gaspacho-ecologico-de-invierno/>



Why is this product a success? Gazpacho Soup is traditionally consumed over summer time. This company launched a special version to be served either cold or warm. Increasing consumption on a



highly demanded product in the Spanish market, yet very seasonable. Shifted to winter consumption.

NEW RETAIL CONCEPT

The arrival of Amazon Fresh - In September 2015 Amazon.es launched its grocery and household cleaning store. With non-perishable food, cleaning products and leading brands (Kraft, Coca-Cola, Pringles, ColaCao, Carbonell, Kellogg's, Cuétara, Gallina Blanca, and Knorr) as well as local brands. With an app, free one day shipping for Amazon Premium members and orders delivered within 24 hours. At the same time, Amazon doubled the size of its warehouse in San Fernando de Henares (Madrid).

OTHER MAJOR RETAILERS

LIDL With a new and aggressive marketing policy and marketing strategy. The refurbishing of all its stores, the introduction into its mix of more leading brand products and the excellent care of its fresh produce, have led to an increase in its market share by 2 points and 2 million customers.

IKEA With food tastings, dishes prepared in plain sight, information on the ingredients and the source of the food and more space for the restaurant and the sale of Swedish food products.

DO NOT MISS

El Corte Inglés and its new Gourmet Experience in the refurbished buildings in Calle Serrano in Madrid, with chefs with 3 Michelin stars, offering premium and high quality products that combine buying and tasting.

Platea: in Goya Street in Madrid, the five floors of an old cinema have been converted into a leisure area. A traditional market, restaurants, classic "tapas" bars and stores selling gourmet products.

Mercadona: A Spanish leading supermarket chain with 25% market share.



TURKEY

By Ayse DINCER, *Dunya Gida*

RETAIL TRENDS

Opening new food concept stores: One concept being **Gourmet stores**. The other concept being smaller chain shops for quick and handy purchases. There is also a trend towards smart shopping. There are several internet stores and almost all the chain stores have e-sales from stock to door. Organic shelves have more products and special shelves such as diabetic or celiac are increasing. Products with regional Denomination of Origin are being promoted.

CONSUMER TRENDS

Healthy products: Consumers are more and more concerned about what they eat and how healthy the products are. They are getting more used to reading labels and looking for certificates. Value added products are preferred. As more people are spending their time at home, fun, leisure and gourmet products are increasing sales. Furthermore, products specially produced for diabetics, celiac or high blood pressure consumers are increasing.

TREND 1: INNOVATIVE HEALTHY FOODS

Healthy foods are very important for Turkish consumers. Among the same type of products, consumers prefer what they think is the healthiest and more innovative. Value added products have always been a favorite among consumers but this time a new way is emerging. Consumers prefer naturally added ingredients or added value for certain purposes. The trend is products with fewer ingredients, no chemicals with new and interesting natural ingredients which offer a new taste and health benefits.

GRAPE SEED PASTA/ ARBELLA PLUS GRAPE SEED PASTA

Brand: DURUM Gıda Sanayii Tic. A.Ş./Arbella Pasta

Launch date: 12/2014

Category: Grocery

Family: Starches, pasta, rice

General description: Arbella plus grape seed pasta is produced from durum wheat semolina and grape seed. Grape Seed is one of the food sources of antioxidants. An antioxidant is a molecule that inhibits the oxidation of other molecules. Oxidation is a chemical reaction that can produce free radicals, leading to chain reactions that may damage cells. Antioxidants terminate these chain reactions. Grape seed also contains vitamin E, potassium, calcium, phosphorus, magnesium and iron minerals. The minerals in our diet are essential for a variety of bodily functions. They are important for building strong bones and teeth, blood, skin, hair, nerve function, muscle and for metabolic processes such as those that turn the food we eat into energy. This means that minerals are needed for





the body to work properly, for growth and development, and overall, for maintaining normal health.

Why is this product a success? Grape seed pasta is a unique offering of its kind. With the grape seed added, which is an antioxidant, the pasta has a unique taste with anti-aging properties. It protects and restores blood vessels, lowers blood pressure, and reduces blood cholesterol.

TODAY CROISSANT SPRING

Brand: ELVAN Gıda Sanayii ve Ticaret A.Ş. / TODAY

Launch date: 10/2015

Category: Grocery

Family: Biscuits



General description: Today Croissant Spring is a salty and spicy croissant which is flavored with olive oil, thyme and basil.

Why is this product a success? There is no other croissant in the world with such salty and spicy flavor. Olive oil, thyme and basil ingredients in a croissant is new. This unique product will create a new trend in the market. Able to keep freshness for 6 months.

TREND 2: GOURMET FOODS

Due to the burden of working, traffic or finance problems, consumers are keener for spending time and eating at home. They like to spend time alone or with friends or family. Gourmet foods are just what they want to make the best of their leisure time and for enjoyable meals.

ALFARM STUFFED MUSSEL IN MODIFIED ATMOSPHERE PACKING (MAP)

Brand: Leroy Turkey – Seafood Group/Alfarm

Launch date: 12/2015

Category: Frozen Products

Family: Savory frozen products

General description: Mussels are stuffed with a heat treated mixture of rice, onion, garlic, cumin, allspice, black pepper and salt. This is Mussel Dolma which is very popular in Turkey. Mussels come in two groups as fresh and frozen. Fresh mussels are packed in sealed styrofoam or carton boxes. Internal temperature of the products should be between 0, +4 °C. Frozen mussels come clean and packed in sealed carton boxes.



Why is this product a success? “Stuffed mussels” and “fried mussels” are very popular, traditional snacks of Turkey. Mussels collected from polluted water and prepared at unhygienic places may pose a threat to human health. To avoid health risks Leroy uses mussels from clean water farms.



TREND 3: FUN PRODUCTS

We need some fun in life. Fun products are made just for this purpose. They are interactive and give you possibilities to enjoy life with friends or alone, to experience different feelings with your 5 senses and after all we all need to pamper ourselves sometimes with foods that give us energy and enjoyment.

SOUNDY CANDY

Brand: Toller Gıda San. ve Dis Tic. A.S. (Toller Food INC)

Launch date: 02/2015

Category: Grocery

Family: Sweets

General description: A unique confectionary product which fuses the conventional form of a hard boiled candy with the acoustic effects of the popping candy which activates all of your five senses...



Why is this product a success? The transformation of the granular popping candy into the conventional hard boiled candy form has been considered "technologically impossible" in literature. SoundyCandy® is the first patented product of its kind.

NEW RETAIL CONCEPT

New chains or stores are being opened as part of large chains. These sell high quality gourmet products with relatively high prices. The products are imported from all over the world or are produced domestically. Special health products, delicatessen and certified products are also sold. They are innovative in a sense that these chains sell products at a high price whereas the trend is towards discount markets.

OTHER MAJOR RETAILERS

Contrary to gourmet product chains large chains like **Migros** or **Carrefoursa** have started a new concept of smaller shops at several corners. They only sell to meet the quick requirements of consumers. Products are for everyday use, not wide in range but enough to satisfy the consumer in a hurry. They are not very original but they are certainly taking the place of the traditional "Turkish Bakkal" concept which used to be at every corner and reachable distance selling for immediate requirements.

DO NOT MISS

Migros: A relatively high priced chain market with a high–end range of products. GMP, traceability, and organic certificates are available. **Carrefoursa:** Has a new chain **Carrefoursa Gurme**. Gourmet chains have a wide range of imported products. Consumers can find products from all over the world and special products from domestic producers. Also special products such as organic, diabetic or products for celiac, etc. are sold. **Bim:** A quality discount market. Has quality private label products at a cheap price.



UNITED KINGDOM

By Daniel SELWOOD, *The Grocer*

RETAIL TRENDS

Amazon pushing further into UK online grocery, and news of the impending arrival of Amazon Fresh.

CONSUMER TRENDS

Growing awareness of the health impact of excessive sugar consumption and the launch of major public health initiatives to promote sugar reduction as well as reformulation programs from industry.

TREND 1: NEXT GEN COCONUT

Coconut is touted for its multitude of health benefits : with proponents claiming it is good for heart health, immunity, weight loss and improved digestion. It also has wide-ranging health and beauty claims : from softening skin to restoring damaged hair. Coconut water and coconut oil have now hit the mainstream in UK retail, and as consumers look for products with "functional benefits" we have seen a huge swathe of coconut-based NPD from flours to snacks and even head lice treatments.

PIP & NUT COCONUT ALMOND BUTTER

Launch date: 01/2015

Category: Grocery

Family: Jams / Fruit in Syrup / Spreads

General description: Pip & Nut's Coconut Almond Butter (rsp: £4.29/250g) is an alternative to peanut butter and other spreads. It is high in protein, totally free from palm oil, and contains only almonds, coconut, agave syrup and sea salt.

Why is this product a success? It won The Grocer's Coconut-based Foods New Product Award 2015 for introducing coconut into a more mainstream product and bringing something new and different to the nut butter category. Consumers love its taste, texture and health credentials.



TREND 2: CARB ALTERNATIVES

The 'spiralizing' vegetable trend has taken hold in the UK kitchens - popularized by 'real food' pioneers such as Jasmine and Melissa Hemsley. Over the past year, retailers have looked to capitalize on the trend with the launch of pre-prepared courgette spaghetti and cauliflower couscous. We have also seen more low-carb snacks like carrot crisps.



TESCO COURGETTE RIBBONS

Brand: Tesco

Launch date: 05/2015

Category: Fresh Products

Family: Fruit / Vegetables

General description: Tesco's Courgettes Ribbons (rsp: £1 for 250g) are marketed as the 'perfect alternative' to starchy pasta or noodles. They are 100% courgettes shredded into ribbons.

Why is this product a success? Tesco was the first to capitalize on the 'spiralizing' trend and Courgettes Ribbons were its most talked-about veg line last year. The product offers consumers a low priced, convenient way to go low-carb, and adds value to the veg category.



TREND 3: VIRTUOUS SNACKING

Popcorn is the star performer of the virtuous snacking trend, to the detriment of potato crisps. That's potentially bad news for big brands like Walkers but good news for smaller players in the snacks category, from The Giving Tree and its broccoli crisps to the bagged mixes of Liberation Nuts. And it's a rising trend that has also broadened; demand for protein-rich snacks has driven the upswing of meat snacks, with Mattessons the most recent brand to invest heavily in pushing the sub-category.

GOOD TO GO

Brand: Graze

Launch date: 07/2015

Category: Grocery

Family: Appetizer Grocery products

General description: Graze Good to Go's initial launch in July 2015 comprised 12 products including flapjack, pretzel dippers and nuts. The range tapped demand for higher-protein products, with Punchy Protein Nuts (with 7.6g of protein per serving) and Veggie Protein Power (black pepper cashews, edamame beans and chickpeas and contains 6.9g of protein per serving) as the standout products.



Why is this product a success? Good to Go was the first step into retail for Graze, tapping into the current virtuous snacking trend it pioneered – having launched in 2009 to deliver healthy snacks direct to consumers – and it immediately won listing in 850 Sainsbury's stores.

NEW RETAIL CONCEPT

Amazon Fresh - the push of the online retail giant into groceries has the potential to cause significant disruption. It is the first big example of disintermediation in the UK grocer market.

Aldi offering wine online - The first online offer from Aldi, which signals a potentially bigger push online for the discounter



OTHER MAJOR RETAILERS

Graze - After selling direct to consumers, Graze has recently successfully moved its innovative snack solution into UK supermarkets.

Unilever reformulates ice cream - To keep ahead of the sugar debate, Unilever has taken the brave plunge of setting a 250 calorie cap for its adult single serve ice creams. Free-range dairy and grass-fed beef/lamb - As consumers become more aware of food production methods, brands and retailers have developed free-range and grass-fed into a point of difference.

DO NOT MISS

Holland & Barrett – As UK shoppers embrace health trends, Holland & Barrett has evolved into a body and soul emporium offering everything from protein pick n mix to healthy snacks. Lidl's Store of the Future - The discounters are trying to shed their budget image in the minds of UK consumers and the new 'posh stores' mark a move upmarket. Sainsbury's mission-focused store layouts - Sainsbury's trial of new store concepts shows how the mults are finding new ways to use space in big stores.



USA

By Lindsey WOJCIK, *Grocery Headquarters*

RETAIL TRENDS

After 156 years in business, The Great Atlantic & Pacific Tea Co., known as A&P, filed for bankruptcy protection under Chapter 11 for the second time. Once known as the largest food/grocery retailer in the U.S., A&P listed assets and liabilities of approximately \$2 billion including 334 stores under the A&P, Pathmark, Super Fresh, Waldbaum's, and Food Basics banners. Several buyers including other chains and independents have purchased the stores. All stores closed Nov. 25, 2015.

CONSUMER TRENDS

Consumers expect more transparency from food manufacturers. The demand has created a trend for cleaner labels with recognizable ingredients and less minimally processed items. As a result, more than 20% of new products released in the U.S. last year were clean labels. Large consumer packaged goods companies like Nestle USA, General Mills, The Hershey Company, and The Kellogg Company have begun to reformulate products, remove harmful ingredients or transition to natural preservatives.

TREND 1: SMARTSHOPPING

More consumers are looking for convenient on-the-go produce snacks.

ROCKIT APPLE

Brand: Chelan Fresh in partnership with Borton Fruit

Launch date: 04/2015

Category: Fresh products

Family: Fruits / Vegetables



General description: The Rockit Apple is a cross between a Pacific Rose and a Crab Apple. It is sweet with a snap of tart. The small apple has a soft core that can be eaten, making them kid friendly. It comes in a three- or four-pack tube. Chelan Fresh in partnership with Borton Fruit (USA - Washington Grown) first harvested the Rockit in 2015 in the U.S. Havelock North Fruit Company first grew Rockit Apple in New Zealand. Chelan Fresh has the North American distribution rights of the apple.



Why is this product a success? Rockit's unique packaging and appealing branding has resonated with all audiences. Americans want to improve snacking quality and eating habits but are constantly busy. The tube and small size provide an answer to on-the-go healthy snacking.



TREND 2: GLOBALIZATION OF TRADE

Americans are incorporating more ancient grains into their diet.

KELLOGG'S ORIGINS ANCIENT GRAINS BLEND CEREAL

Brand: The Kellogg Company/Kellogg's Origins

Launch date: 07/2015

Category: Grocery

Family: Cereals

General description: Kellogg's Origins was developed with the simple mission to create wholesome, fulfilling food that nourishes. Kellogg's Origins Ancient Grains Blend Cereal is made with a touch of honey and a combination of spelt, quinoa, barley, and brown rice flakes and KAMUT Khorasan wheat. It is available in 11.8-ounce and 3 pack 35.4-ounce sizes.



Why is this product a success? Ancient grains have only recently been adopted in the U.S. Kellogg's Origins meets consumer needs for healthier breakfast options. In August 2015, the cereal ranked on Instantly's list of 10 new products that consumers intended to buy.

TREND 3: HEALTH

Functional beverages with added health benefits are keeping Americans hydrated.

ELDERFLOWER GREEN TEA

Brand: American Brewing Company

Launch date: 12/2015

Category: Beverages

Family: Soft drinks

General description: The crisp beverage combines green tea with a splash of elderflower. The organic, gluten-free, non-GMO drink features live probiotics. It is also non-GMO. Búcha is made through several proprietary production processes, including a special extraction method, and the use of high quality natural ingredients. The company's brew balances sweet/sour, subtly matching this with complex flavor attributes and juices. Part of this balancing act is to also balance the fermentation conditions for great taste.



Why is this product a success? Elderflower Green Tea was recently added to Búcha Kombucha's line. The brand has grown from \$5 million in 2012 to \$31 million in 2015 (week ending July 4, 2015). Búcha has much less of a vinegar tang and provides non-traditional flavors.

NEW RETAIL CONCEPT

Retailers like Whole Foods, Target, Stew Leonards and Ahold are experimenting with small store formats in an effort to stay competitive in their markets. Target's smaller format stores, for example, feature a checkout lane configuration that is catered to high traffic and smaller basket size, as compared to a general merchandise store. 365 by Whole Foods Market stores focus on convenience



and everyday low prices on natural and organic products that meet the company's standards for quality.

DO NOT MISS

Wegmans offers superlative customer service, top-flight prepared foods sections, extensive brand equivalent or better private label programs and dedication to each and every department in its stores. Kroger, the third-largest retailer in the world, has made organic food a priority. Its Simple Truth organic house brand has grown to sales of \$1 billion in just two years. Trader Joe's continues to innovate its private label products and offer high quality, value oriented fresh products.

OTHER CONSUMER HIGHLIGHTS

Free from and gluten-free foods continue to dominate trends in the industry. Consumers want more allergy-friendly foods even if they do not have an intolerance because they perceive these items as healthier options. Protein enriched foods and beverages are beginning to take off as consumers learn the benefits of having more proteins in their diets. Some estimates predict that liquid protein will grow 15% by 2016 to \$3.4 billion. Examples include protein water and protein shakes.