



FOOD & BEVERAGE TRENDS IN THE U.S.

3rd Export USA Forum, Thessaloniki, Greece

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3RD EXPORT USA FORUM 2018

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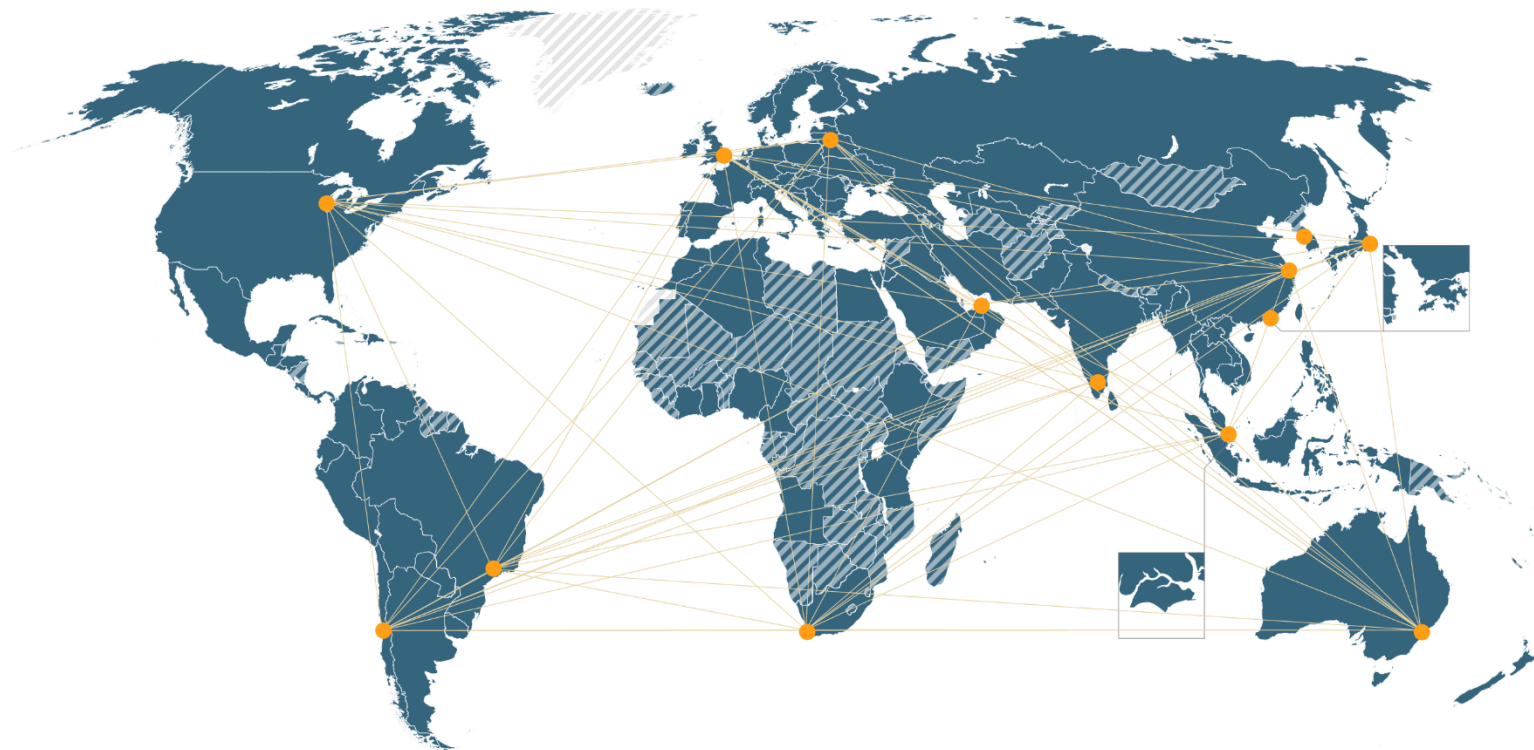
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ABOUT EUROMONITOR



● 14 OFFICE LOCATIONS

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

■ 100 COUNTRIES












in-depth analysis on consumer goods and service industries













■ + ■ 210 COUNTRIES

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







EUROMONITOR INDUSTRIES & TODAY'S FOCUS

Consumer Products



-  Alcoholic Drinks
-  Apparel
-  Automotive
-  Beauty and Personal Care
-  Consumer Appliances
-  Consumer Electronics
-  Consumer Health
-  Eyewear
-  Fresh Food
-  Health and Wellness
-  Home and Garden

-  Home Care
-  Hot Drinks
-  Luxury Goods
-  Ethical Labels
-  Nutrition
-  Packaged Food
-  Personal Accessories
-  Pet Care
-  Soft Drinks
-  Tissue and Hygiene
-  Tobacco
-  Toys and Games

Services

-  Consumer Finance
-  Consumer Foodservice
-  Institutional Channels
-  Retailing
-  Sports
-  Travel






Supply

-  Ingredients
-  Packaging

Economies

-  Business Dynamics
-  Cities
-  Economy, Finance and Trade
-  Industrial
-  Natural Resources

Consumers

-  Digital Consumer
-  Households
-  Income and Expenditure
-  Lifestyles
-  Population

EUROMONITOR MEGATRENDS

Euromonitor's Megatrends Framework

Drivers



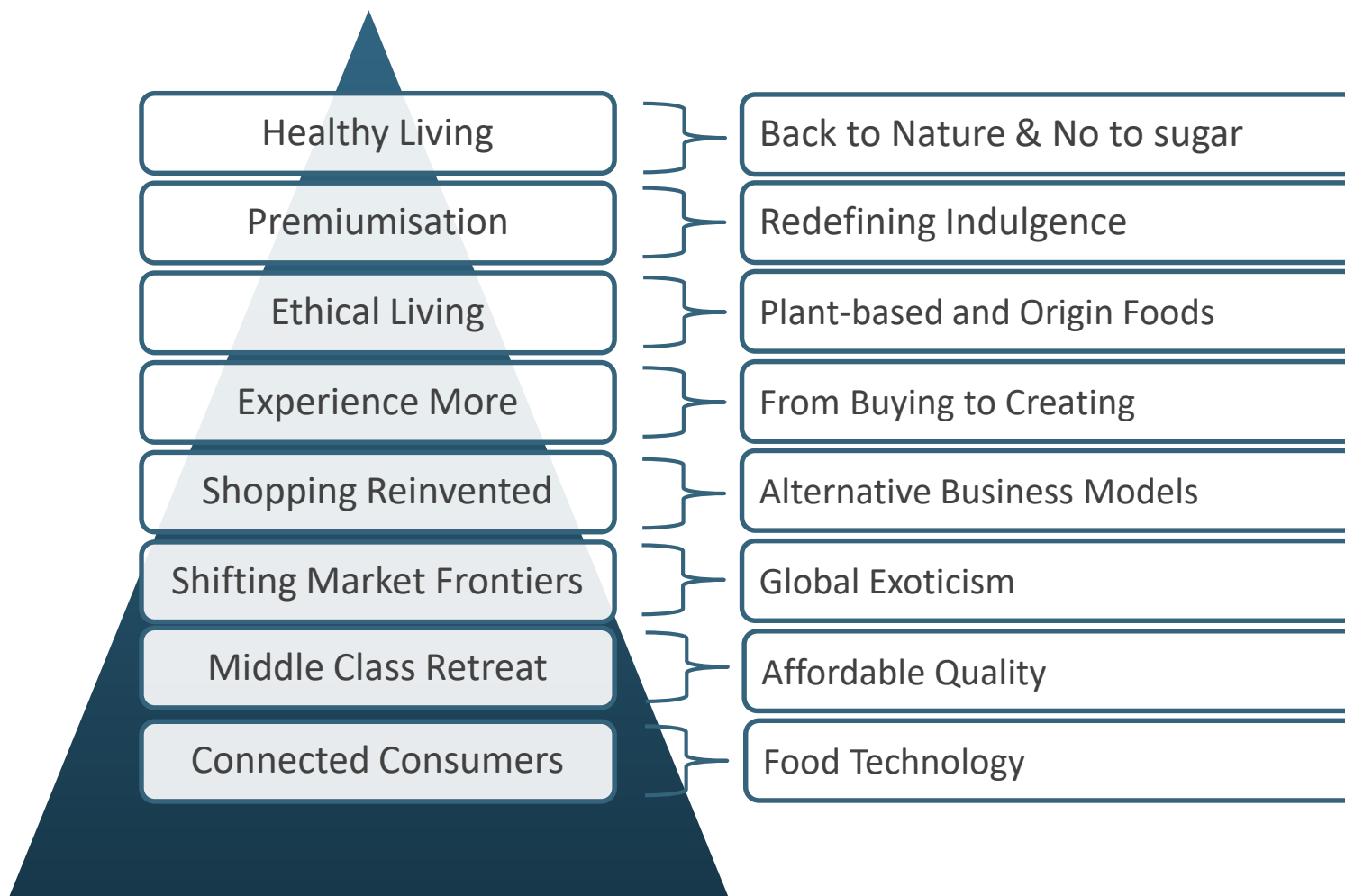
Megatrends



- Euromonitor International has predicted the eight most influential megatrends to watch for in 2018.
- These megatrends, sharing common drivers, have the power to transform and disrupt entire categories.
- Of these eight megatrends, the one with the biggest relevance for and impact on foods is Healthy Living.

8 FOOD TRENDS FOR 2018

The Megatrends Hierarchy in Foods



U.S. CONSUMER LIFESTYLES

DATAGRAPHIC CONSUMER LIFESTYLES

USA: Lifestyles in 2018

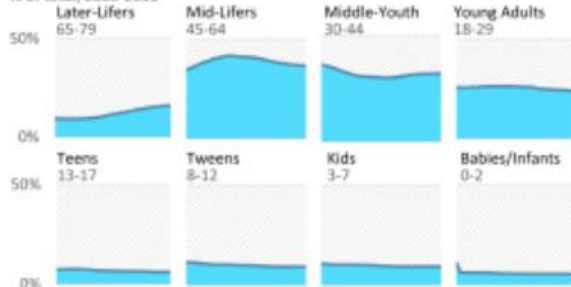
Population

Total, millions

325.4

Population by Consumer Segment

% of total, 2000-2030



Median Age
years

38.0

Fertility Rate
children/female

1.9

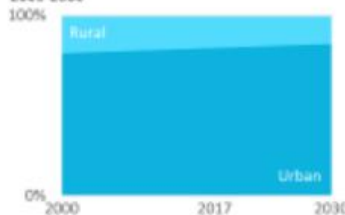
Life Expectancy at Birth
years

M76.7 F81.4

Urbanisation

Urban vs Rural Population

2000-2030

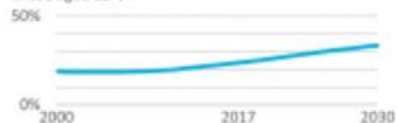


Largest Cities
% of total pop, No. of people

- 1** NEW YORK
2.6% 8,559,100
- 2** LOS ANGELES
1.2% 4,009,200
- 3** CHICAGO
0.8% 2,712,100
- 4** HOUSTON
0.7% 2,338,800
- 5** PHOENIX
0.5% 1,650,700

Old-Age Dependency Ratio

percentage of people older than 65 compared to those aged 15-64



Disposable Income

per capita, US\$ 2017

44,655

Savings

as % of disposable income

10.4%

Households

No of Households, millions

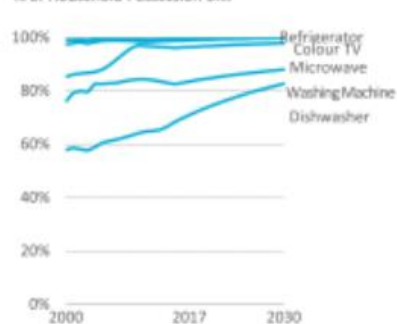
126.2

Home Ownership

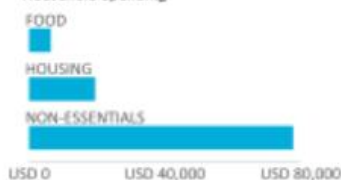


Home Comforts

% of Household Possession of...



Household Spending



Mobile and Online

% of Households that Own a Mobile Phone



% of the Population Using the Internet

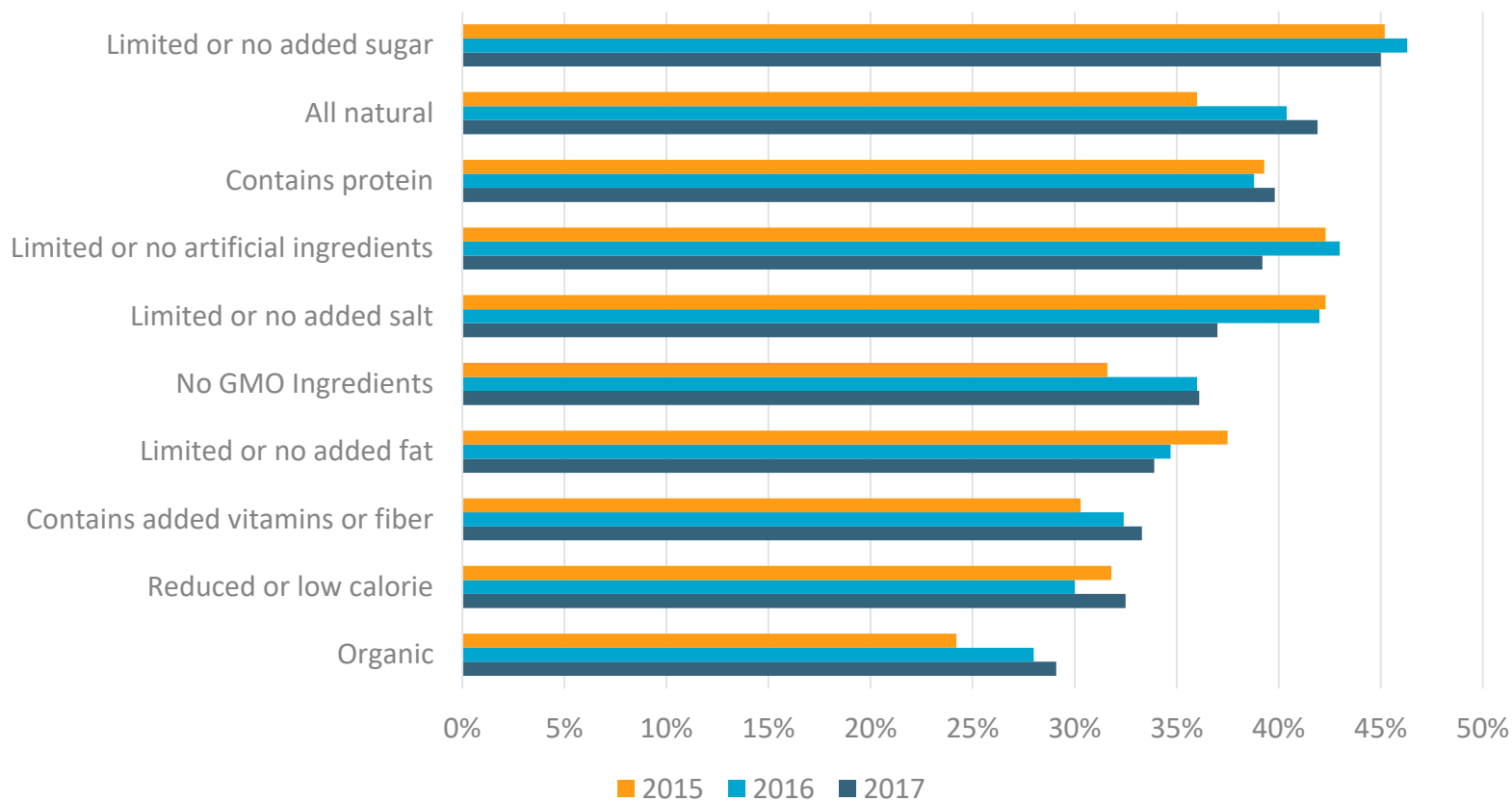


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U.S. CONSUMERS, FOOD PREFERENCES

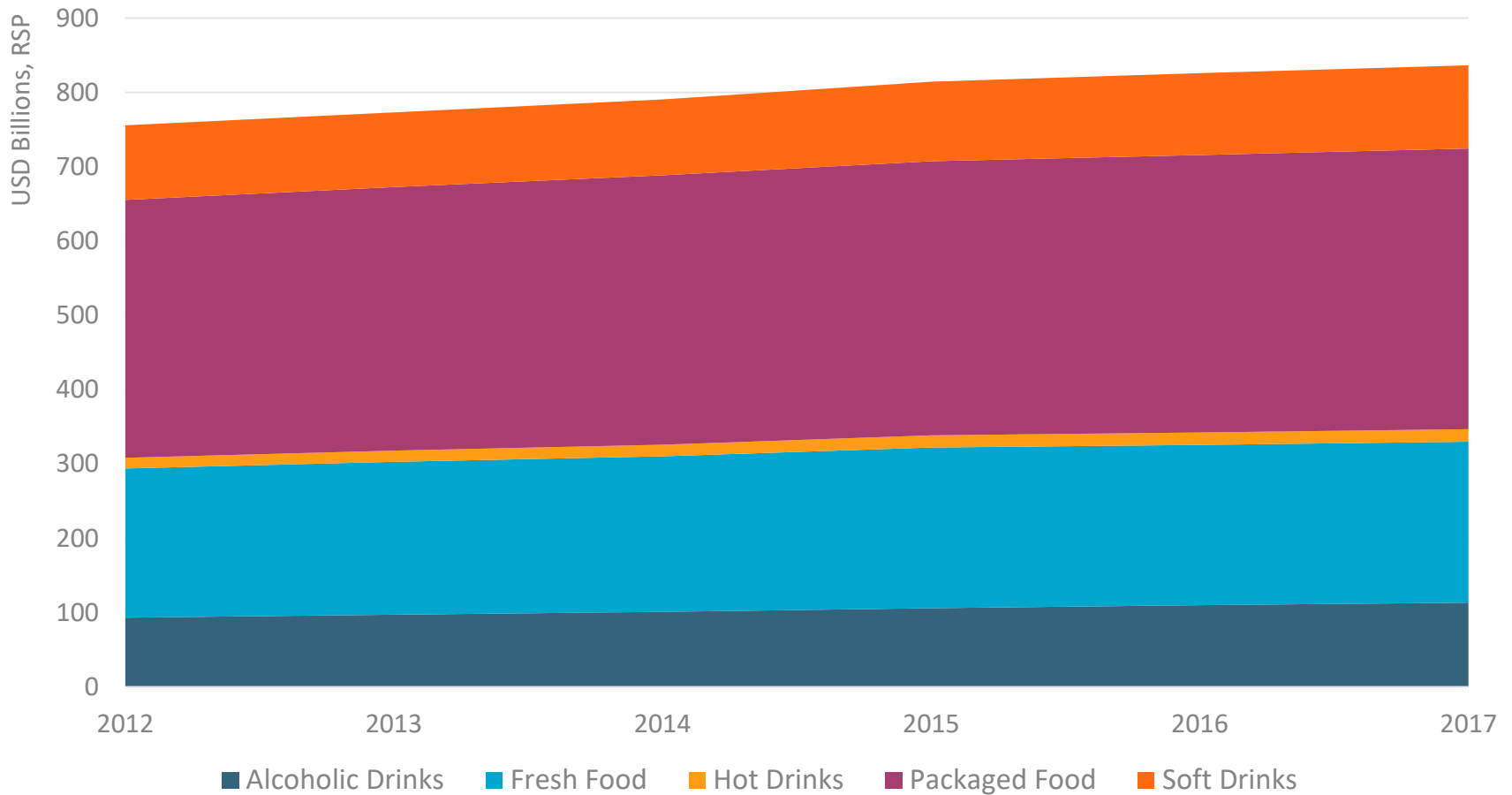
Preferred Food Attributes 2015-2017



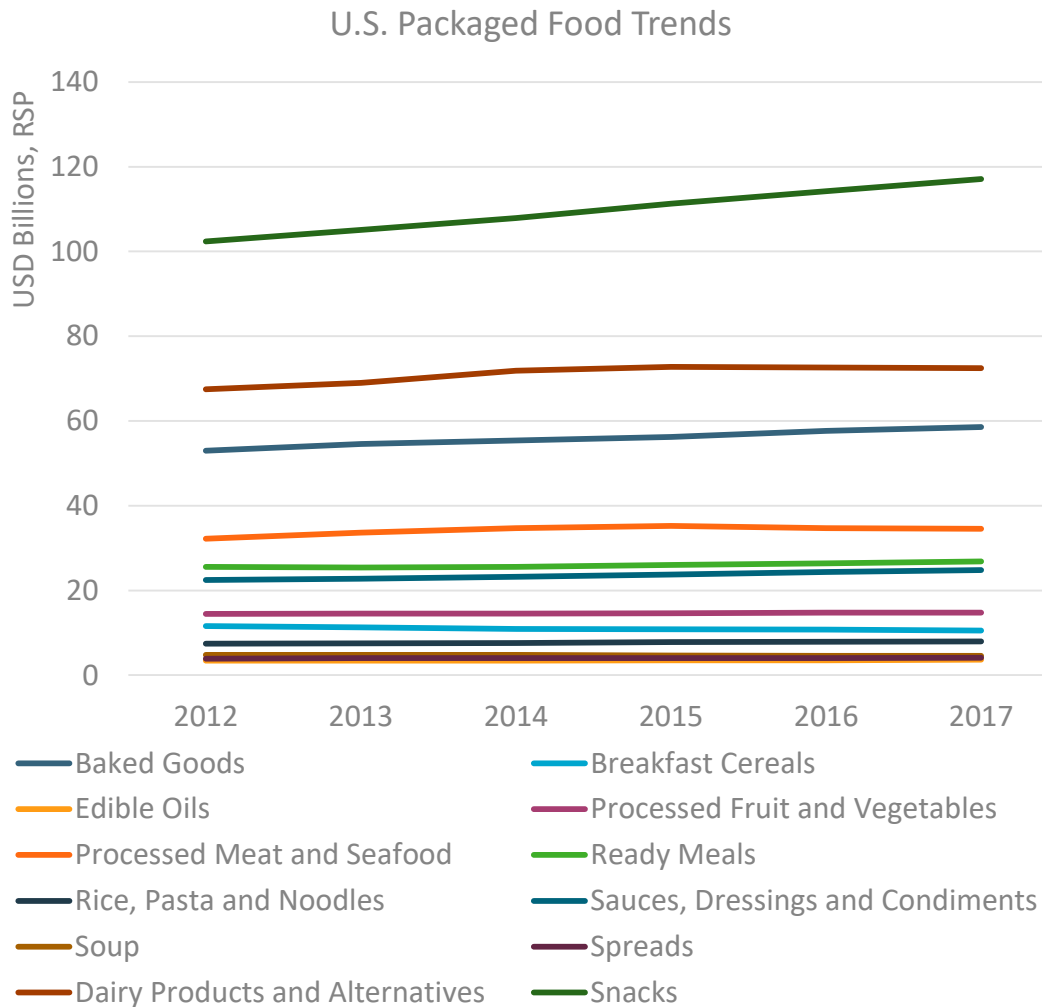
Source: Euromonitor International's Lifestyles Survey

U.S. FOOD & BEVERAGE TRENDS

U.S. Food & Beverage Trends



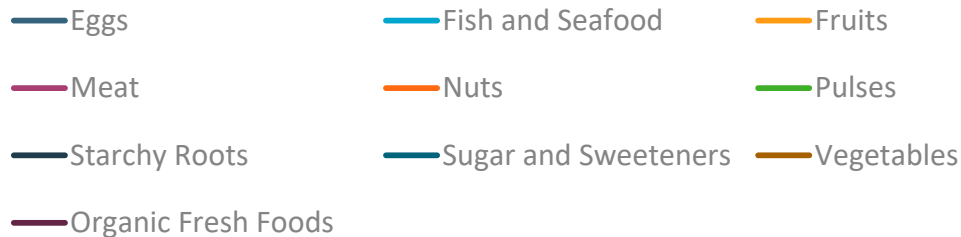
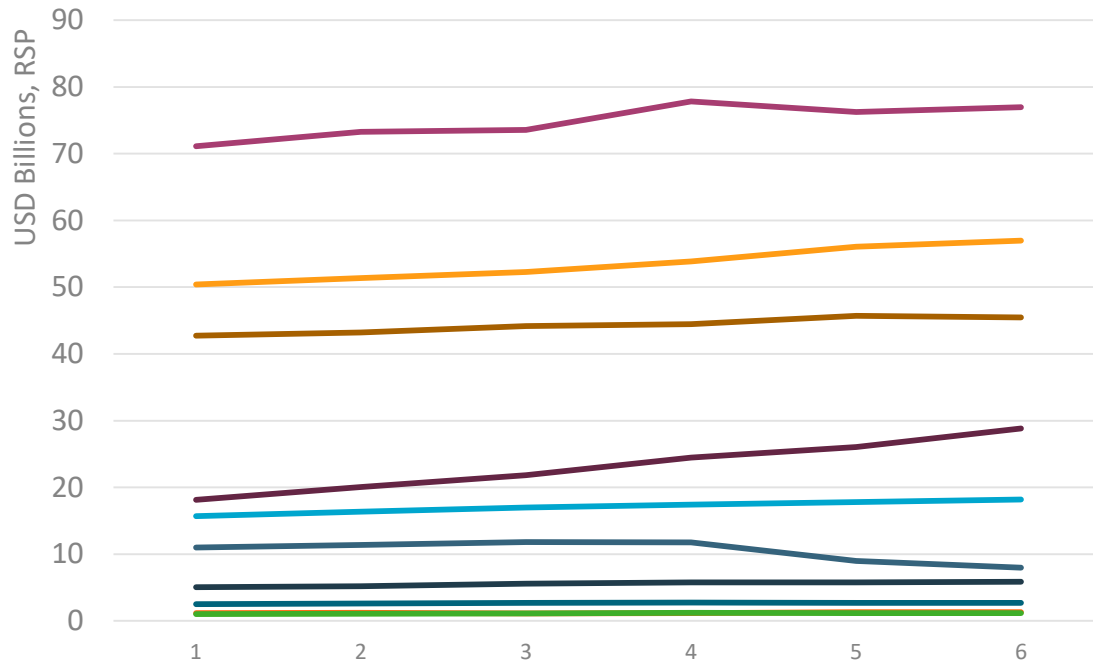
U.S. PACKAGED FOOD TRENDS



- While packaged food continued to grow in 2017, sales increased at the slowest rate since the recession of 2010.
- As consumers are increasingly prioritising convenience, internet retailing saw dramatic growth across packaged food in 2017.
- Organic packaged food increased by 6% in current value terms in 2017, to reach USD15.5 billion.

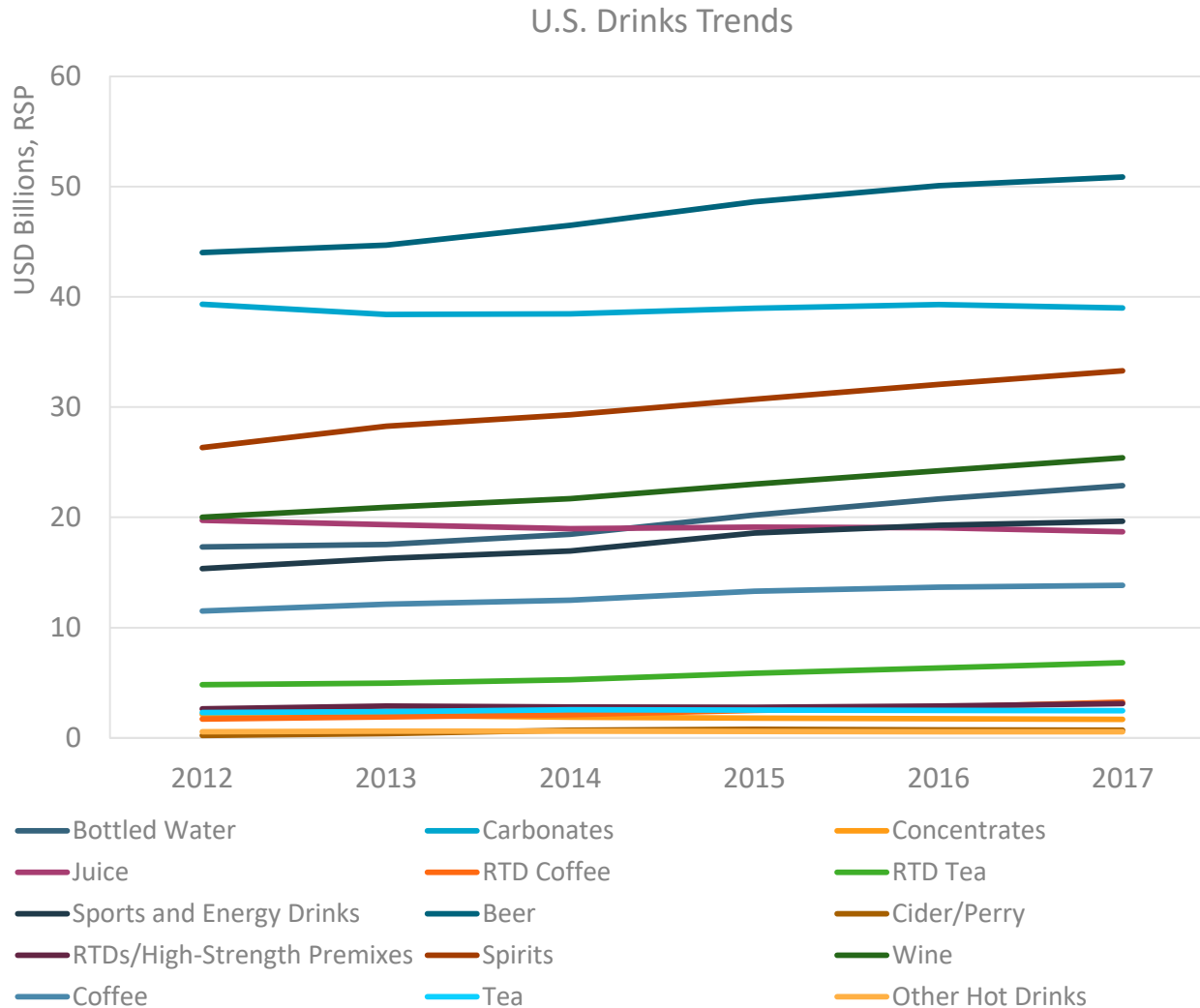
U.S. FRESH FOOD TRENDS

U.S. Fresh Food Trends



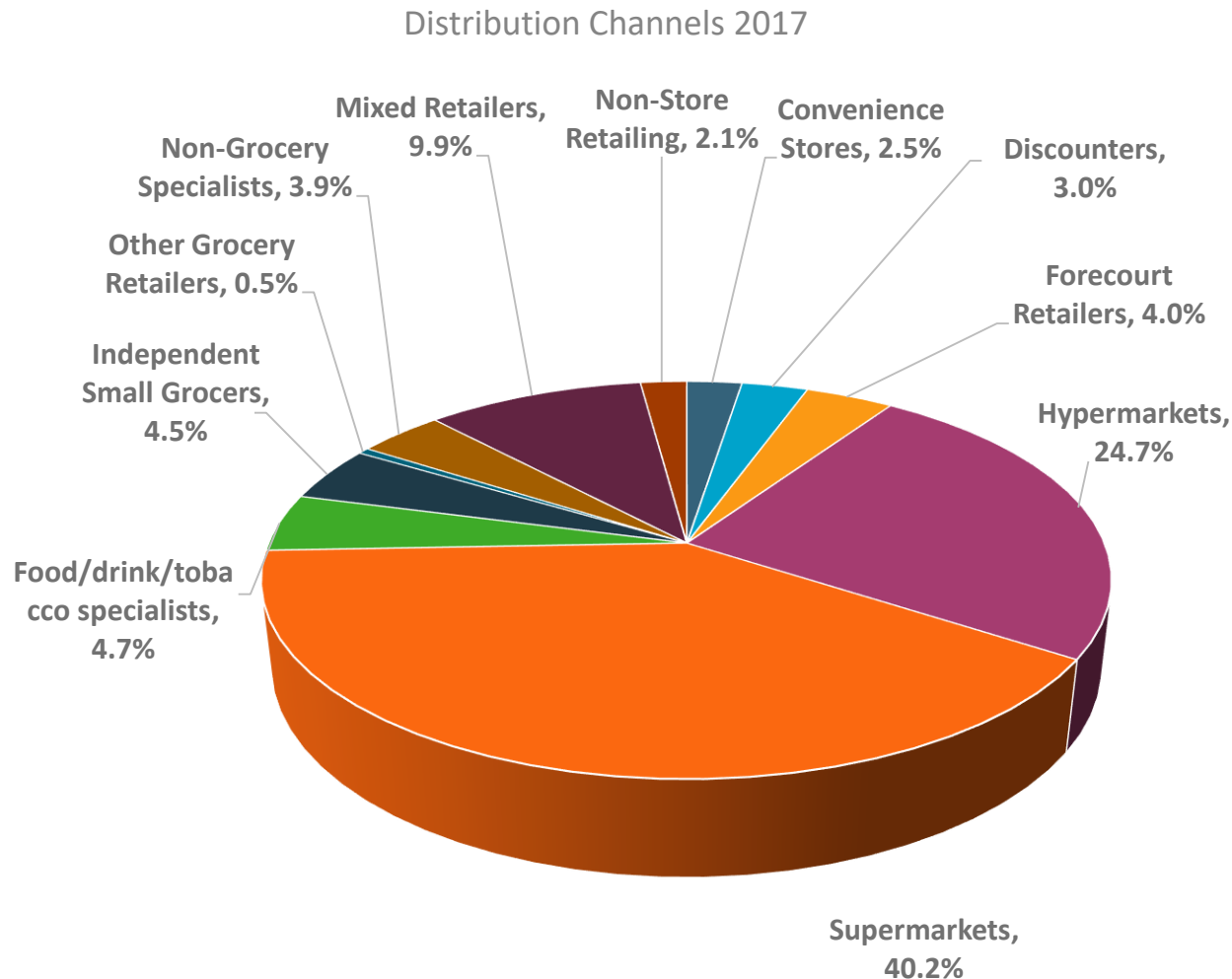
- US Consumers have been shifting away from processed foods towards increased consumption of foods deemed to be both fresh and natural.
- Soaring demand for greater protein consumption is driven by the growth in health consciousness.
- While challenges persist, the future looks overwhelmingly bright for the fresh food industry in the US.

U.S. DRINKS TRENDS



- Carbonates, juices and concentrates have been declining, due to their high sugar content.
- Spirits and wine have been driving alcoholic drinks growth in 2017.
- Coffee and tea to record steady value gains in coming years.

U.S. PACKAGED FOOD DISTRIBUTION CHANNELS



- Supermarkets still remain the main distribution channel in the US in 2017.
- Internet retailing, although representing a small share of the distribution, has increased by over 70% in the last 5 years.
- Forecourt retailers and discounters come 2nd and 3rd with more than 8% and 7% growth respectively in the last 5 years.

INNOVATIVE PRODUCTS

RXBAR

RXBAR filled a white space in the protein bar category by using egg white as the main source of protein.



Source: rxbar.com

Suja Juice

The company provides cold-pressed juices, waters and drinking vinegars. It has become the nation's leading organic and cold-pressed juice brand.



Source: www.sujajuce.com

Halo Top

Halo Top redefined the ice cream industry by introducing a "healthy ice cream" and by telling consumers that it's okay to consume a lot of ice cream.



Source: halotop.com

Spindrift

Spindrift has simplicity at its core. Its ingredients: sparkling water and squeezed fruit. The company recorded 1,000% growth in 36 months.



Source: https://spindritfresh.com

EXAMPLES OF SUCCESSFUL GREEK PRODUCTS IN THE U.S.



Source: www.7days.com



Source: www.gaea.gr



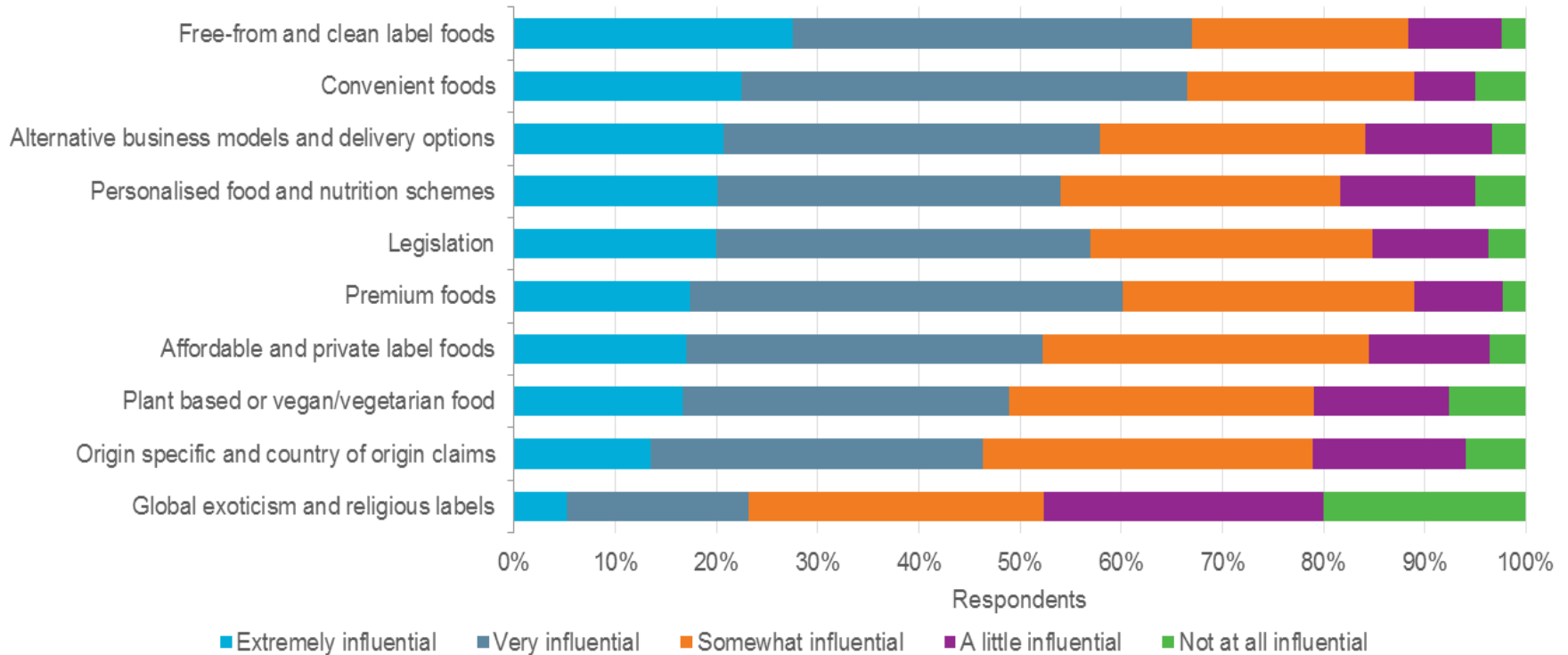
Source: <https://usa.fage>



Source: www.boutari.gr

WHAT THE FUTURE HOLDS

Trends Expected to Impact Packaged Food Sales in Next Five Years 2018



Source: Euromonitor International Packaged Food Industry Insights survey, May 2018

CONCLUSION

Convenience

An increasing portion of food & drink products are consumed on the go

Portability becomes paramount

Healthy living

“Back to Nature” and Naturally Functional

Sugar reduction and rise in healthy foods/ingredients

Connected Consumers

Strong growth of e-commerce and click & collect models

Embrace and utilize technology to attract millennials

TO GO FURTHER



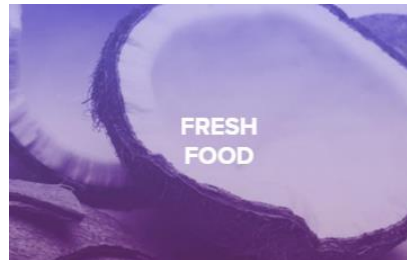
CONSUMER LIFESTYLES IN THE US

Euromonitor International
March 2018



FRESH FOOD IN THE US

Euromonitor International
April 2018



CONSUMER FOODSERVICE IN THE US

Euromonitor International
April 2018



MARKET REPORTS



Thank you, Ευχαριστώ

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