



**Imperial College
London**


**43rd ESMA
CONVENTION**
Golden Prague
16 – 17 September 2021

**Navigating Sales in the New Reality:
Some Reflections on Food & Drink Marketing in the Covid Era**

ESMA Prague Convention 2021

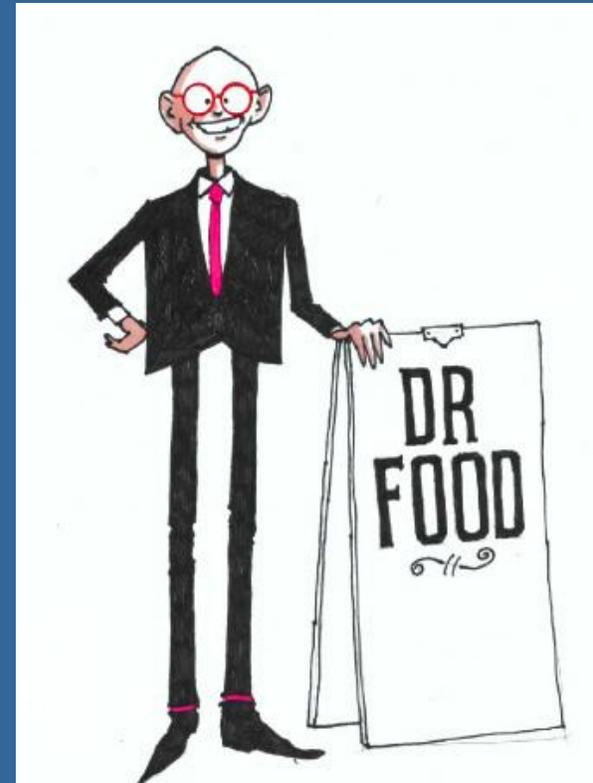
Dr. David Hughes
Emeritus Professor of Food Marketing

43rd ESMA Convention
Carlo IV Hotel, Prague, Czech Republic
Friday, September 17th, 2021

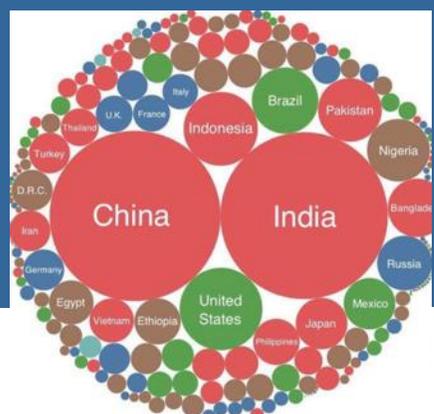
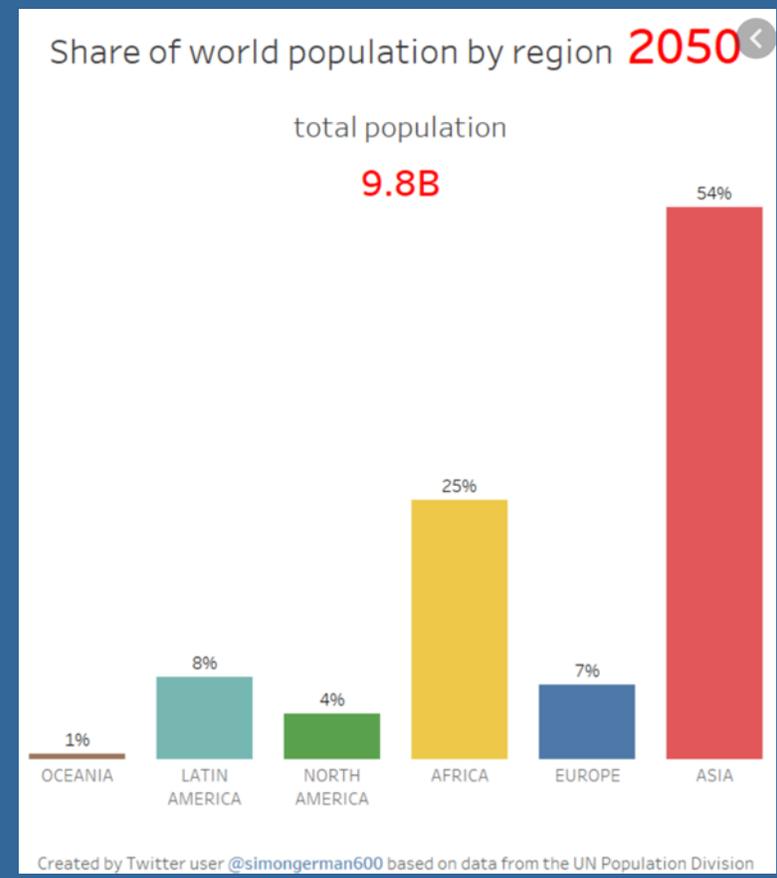
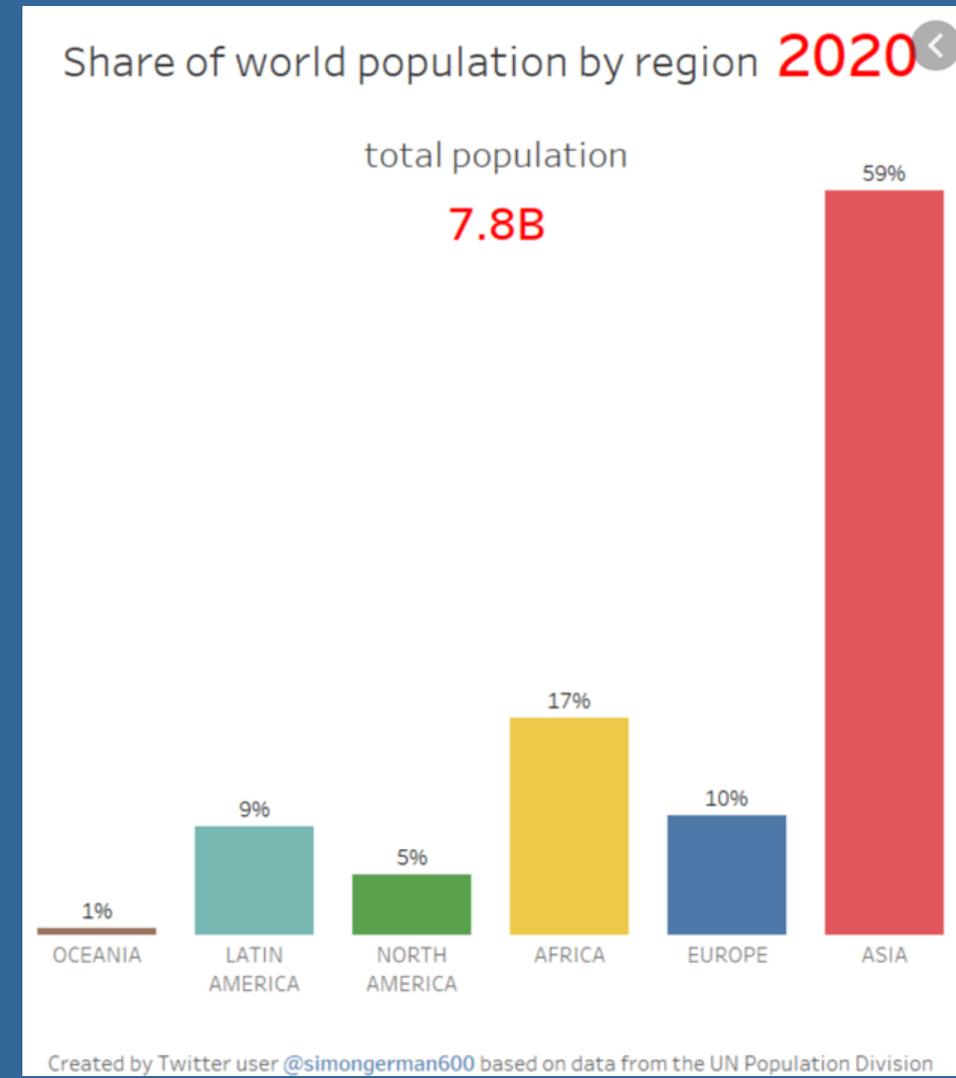
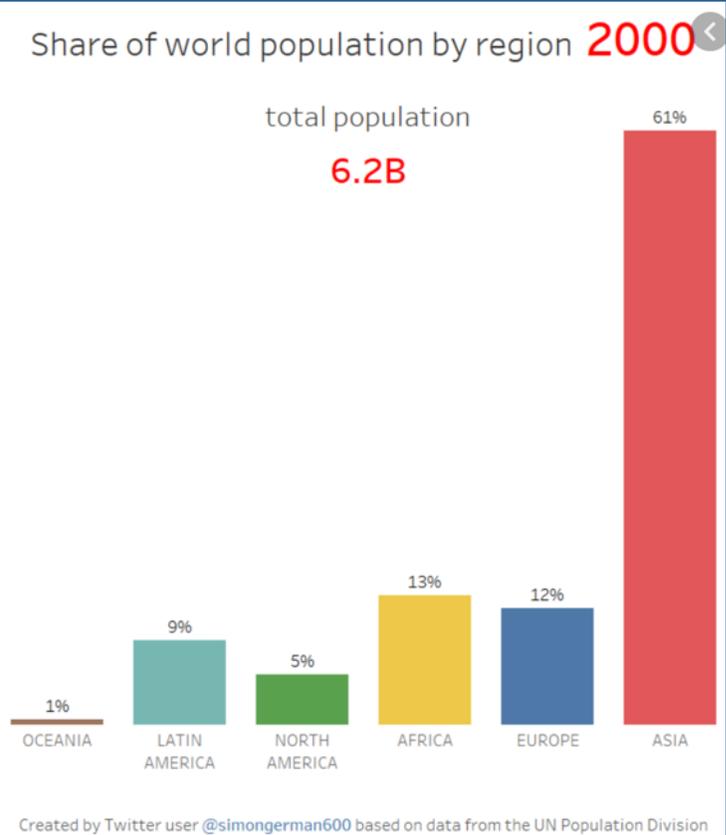


@profdavidhughes

www.supermarketsinyourpocket.com



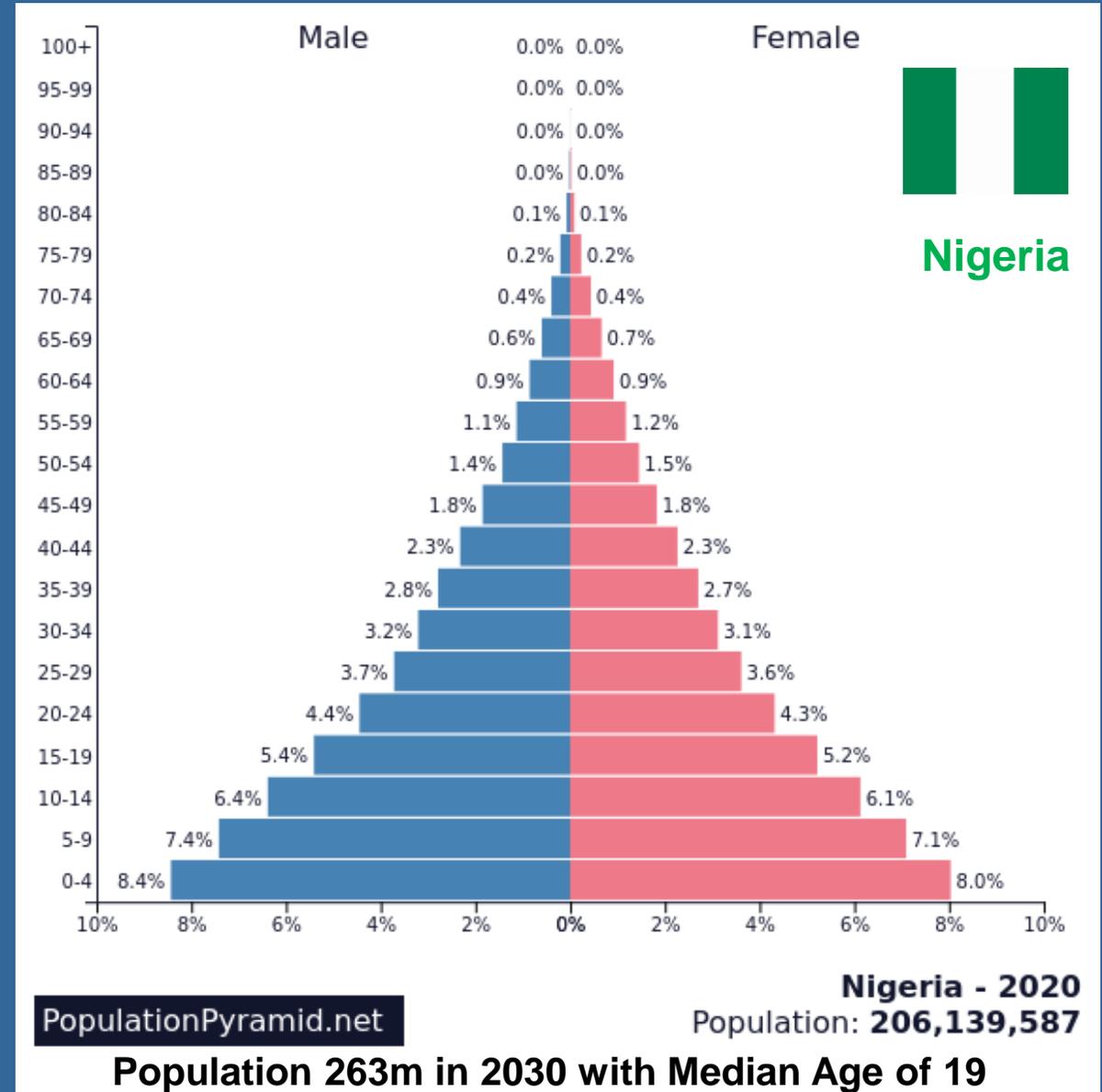
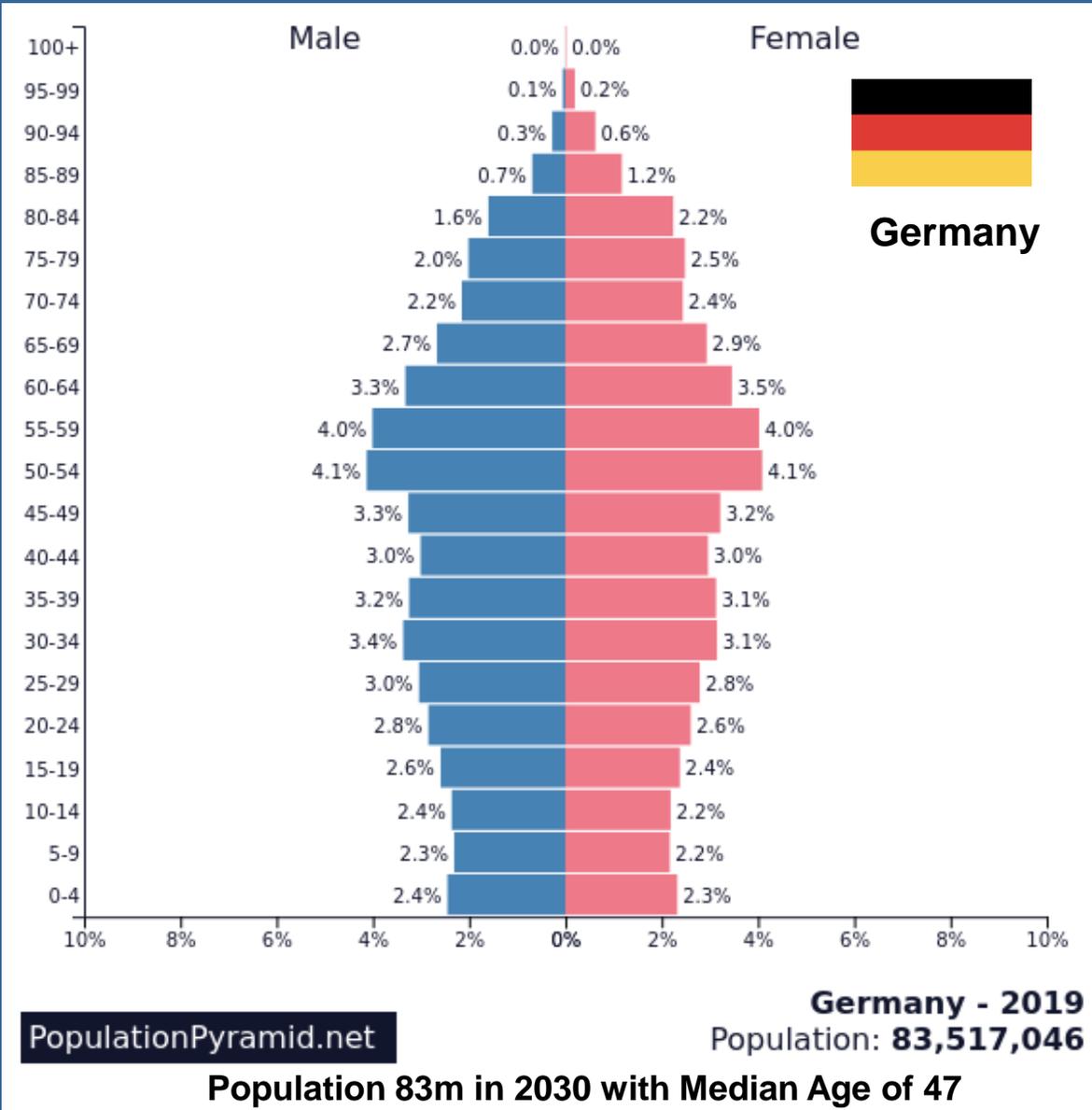
By 2050, 10 Billion People Will Live in Our World and 80% of Them Will Live in Asia & Africa

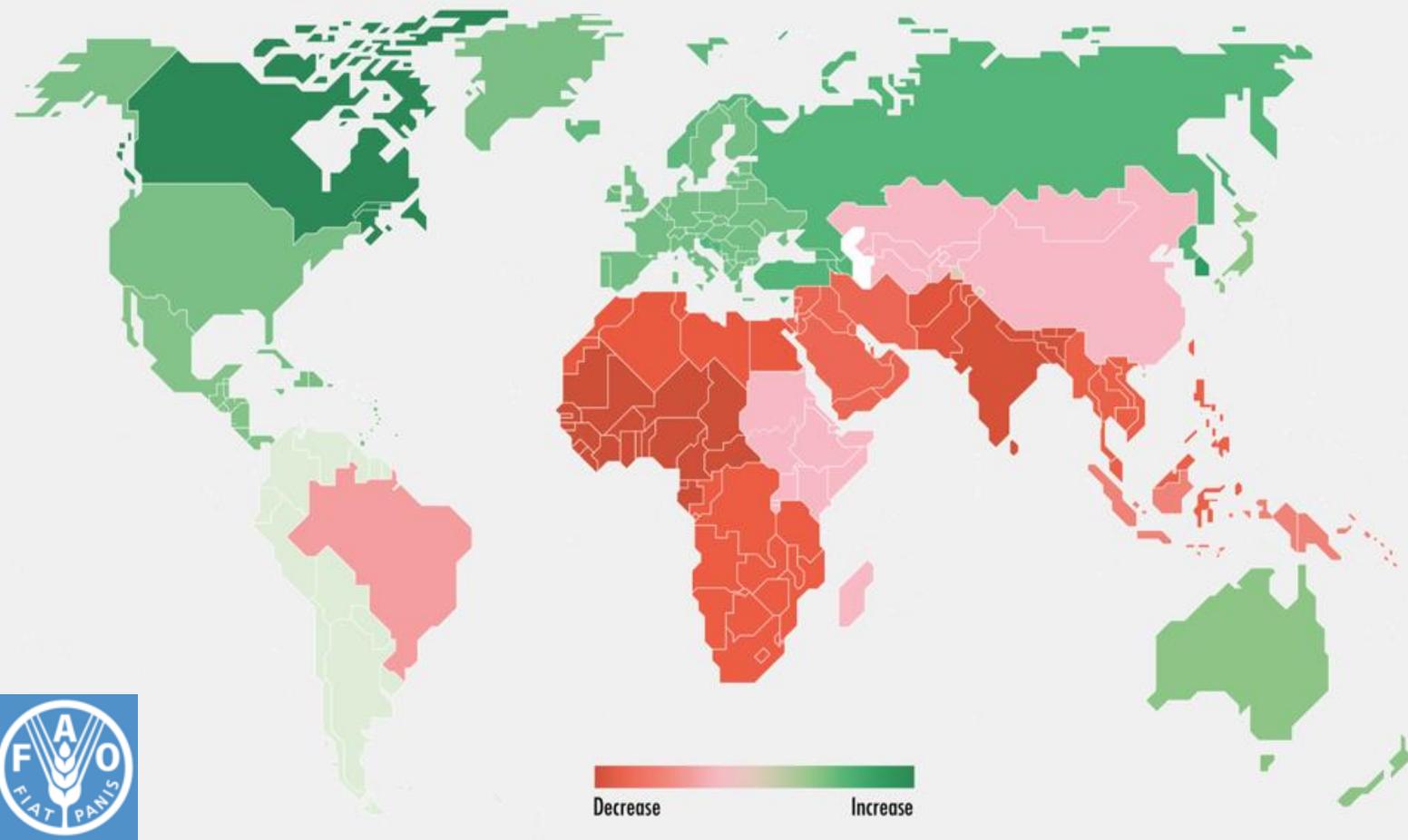


Growing at a slower pace, world population is expected to reach 9.7 billion in 2050 and could peak at nearly 11 billion around 2100 (June 22nd, 2020)

Population of Europe Projected to Decline and Age Slowly. Really? Depends on Rate of Immigration!

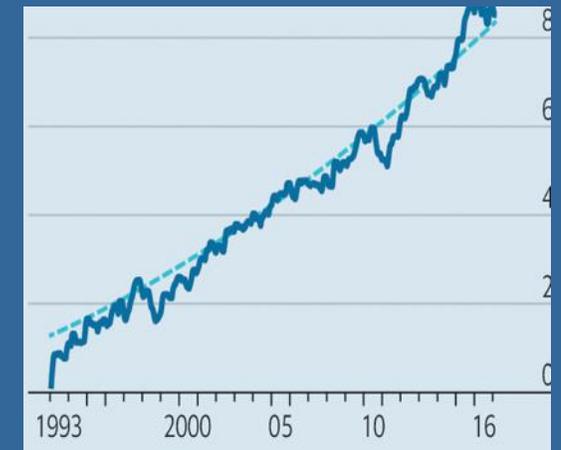
Population Profiles for Germany and Nigeria





Canada has 15% of the world's land mass but only 0.5% of the world's population. Bangladesh has 0.1% of the world's land mass and 2% of the world's population. Bit greedy of Canada to have all that land. Should it give some to Bangladesh as a 50th birthday present?

Average Global Sea Level Rise (cm)*



About half of Bangladesh's 167m Population Live Close to Sea Level

*"The Economist", August 17th, 2019



Dr. Food @ProfDavidHughes

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

Haribo struggles to deliver to UK shops due to lorry driver shortage

German sweet maker has reportedly cancelled promotions on share bags as it tries to maintain availability



Brexit: Lorry driver shortage could mean higher prices in shops

Staff shortages force restaurants and pubs to face 'freedom day' with fear

Chicken, Milkshakes, Candy: Scarce in Britain's Truck Driver Shortage

Empty shelves in supermarkets as lorry chiefs beg for 100,000 more delivery drivers to ease delays

Food and drink industry threatened by 'labour crisis'

Problems in Food Distribution and Chaos in Food Service!



Up to 50,000 more HGV driving tests will be made available each year by shortening the application process and the tests themselves, it said.

The UK faces a shortfall of around 90,000 drivers, which has hit the supply of food, petrol and other goods.

As Restaurants Cut Service Because of Staff Shortage, Workers Consider Their Future

Restaurants across the city are cutting hours for now, but the labour crisis caused by Brexit and COVID-19 will not be temporary



Before Brexit, British trucking companies facing a staffing crunch could hire drivers from continental Europe at short notice. Hiring from Europe is not as easy now. [BBC](#)

Labour shortages hit advanced economies despite many people still out of work

Businesses open after lockdown struggle to find staff but millions inactive and furloughed

McDonald's milkshake shortage is the latest casualty of the U.K.'s food supply restrictions

Food firm in 'drastic' action amid driver shortage

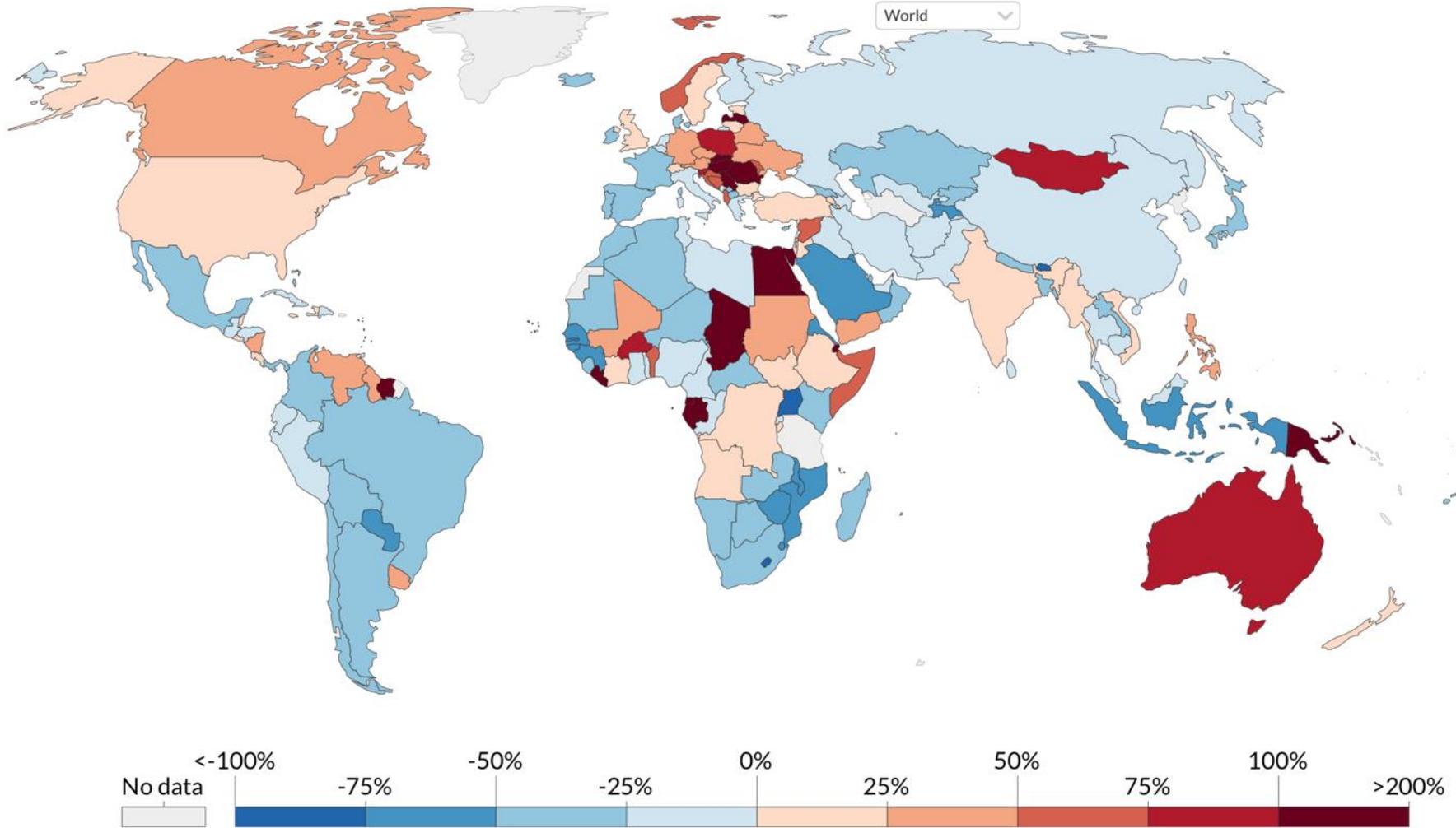


Garth & Sascha Hughes
The Royal George
Appledore, Devon, England

Biweekly change in confirmed COVID-19 cases, Sep 10, 2021

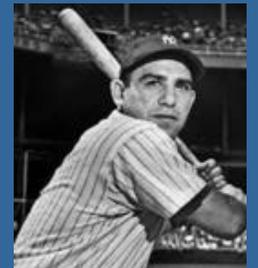
The biweekly growth rate on any given date measures the percentage change in the number of new confirmed cases over the last 14 days relative to the number in the previous 14 days.

Our World
in Data



The Covid Pandemic
“It Ain’t Over
'Til It’s Over”!

Yogi Berra
US Baseball Player
& Moral Philosopher



Source: Johns Hopkins University CSSE COVID-19 Data – Last updated 11 September, 10:03 (London time)

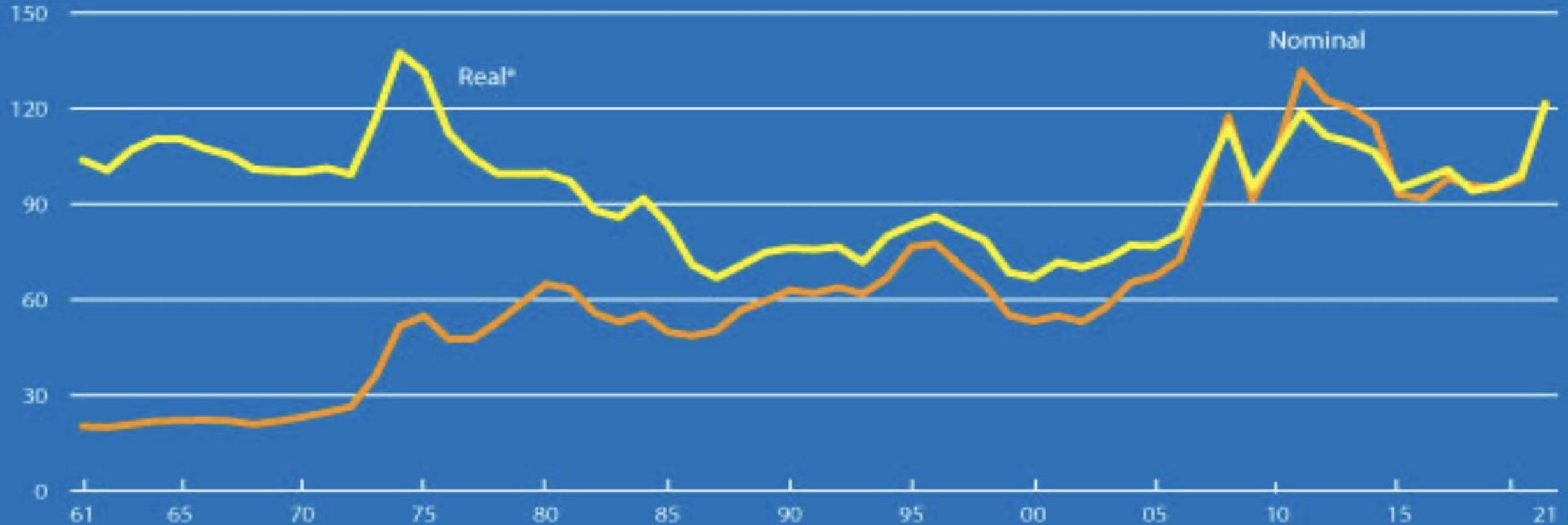
OurWorldInData.org/coronavirus • CC BY

FAO Global Food Price Index: 1961 to 2021*

Index at a 10 Year High

FAO Food Price Index in nominal and real terms

2014-2016=100



* The real price index is the nominal price index deflated by the World Bank Manufactures Unit Value Index (MUV)



Grower's Harvest Chopped Tomatoes 400G

[Write a review >](#)

[Rest of shelf >](#)



Aldi Price Match

£0.28 £0.70/kg



Napolina Chopped Tomatoes 400G

[Write a review >](#)

[Rest of shelf >](#)

£0.75 £1.88/kg



Tesco Italian Finely Chopped Tomatoes 400G

[Write a review >](#)

[Rest of shelf >](#)

£0.42 £1.05/kg



Napolina Plum Tomatoes 4 X 400G

[Write a review >](#)

[Rest of shelf >](#)

Low Everyday Price

£2.25 £1.41/kg



tesco.com



Major Supermarkets Matching Hard Discounter Prices Puts Pressure on Everyone's Margins!

How Much Do You Want to Pay for Your Chopped & Plum Tomatoes?

- £0.70/kg (€0.82)
- or £2.06/kg (€2.41)



Tesco Organic Italian Chopped Tomatoes 390G

[Write a review >](#)

[Rest of shelf >](#)

£0.80 £2.06/kg



Tesco Italian Chopped Tomatoes 227G

[Write a review >](#)

[Rest of shelf >](#)

Low Everyday Price

£0.30 £1.33/kg



Grower's Harvest Plum Tomatoes 400G

[Write a review >](#)

[Rest of shelf >](#)



Aldi Price Match

£0.28 £0.70/kg

Clubcard Price



Tesco Peeled Plum Tomatoes 400G

Any 4 for £1.50 Clubcard Price - Tesco Peeled Plum Or Italian Chopped Tomatoes 400g

Offer valid for delivery from 15/04/2021 until 31/01/2022

[Write a review >](#)

[Rest of shelf >](#)

£0.42 £1.05/kg

The Wheel of Grocery Retailing Continues to Turn!



1920



2020



UK Online Grocery Sales Peaked in 2020 at 16% of Total Grocery – Slipped Back 2% in 2021 But Still Very Strong



Alibaba Group will spend \$3.6 billion to take control of Chinese supermarket giant Sun Art October 19th, 2020



Alibaba's Freshippo opens first membership-only store in Shanghai, challenging Costco and Sam's Club

October 2020

Alibaba to open 10 more Freshippo X stores

May 5th, 2021



Freshippo HEMA



The Grocery Store Isn't Dead BUT It Needs to be Linked Digitally & have a Big Dollop of Theatre

Amazon Fresh till-less grocery store opens in London

March 4th, 2021



AMAZON

Much of the technology involved is located in the ceiling

Amazon to open its first Fresh supermarket with checkout-free technology

June 17th, 2021



Amazon is planning to open a new Fresh store on Thursday that will be the first full-size supermarket in the chain to feature the retailer's Just Walk Out checkout-free technology, according to a [company blog post](#).



AMAZON

Visitors can buy a bag or use their own, and are emailed a copy of their receipt after leaving



M&S

Marks & Spencer announced in November it was expanding use of its "scan, pay and go" service to all its UK grocery stores

December 21st, 2020

Central Food Retail has opened its 12th Central Food Hall, in the suburb of Ladprao, featuring robots and store-in-store concepts.



The food hall has introduced a customer assistant robot called 'Nong Sukjai', which will assist with the Thai Chana check in, take shoppers to various zones and recommend special promotions as well as contacting human staff when needed.





Walking Around a Supermarket Gives You a Good Indication of National Diets And How Seriously a Nation Embraces Food and Eating!



The Spanish are **Serious** Meat and Fish Eaters!

Gopuff enters UK rapid delivery market with Fancy acquisition

May 6th, 2021



Purchase by \$9bn US microfulfilment company heralds arrival in crowded European market



Gopuff operates a network of US 'dark stores' that promise to deliver products in about 30 minutes © Dom Savini/Gopuff

GoPuff raises \$1.15 bn at nearly \$9 bn valuation from SoftBank

March 23rd, 2021



Dija: London startup launches 10-minute grocery delivery with £14.4M seed funding



“Dark” Stores and Rapid Delivery of Grocery Essentials in the UK Market



Ultrafast grocery delivery firm Getir secures \$300m in funding

March 30th, 2021



Gopuff is hiring 100 employees to back ghost kitchens operation

July 9th, 2021



US on-demand grocery giant Gopuff acquires UK's Dija

August 15th, 2021

Imperial College London

Uber buys Postmates in \$2.65B deal

July 6th, 2020



Accelerated Concentration in Restaurant Meal Delivery

% Share of USA Online Delivery Platform Sales

- DoorDash 51
- Uber Eats 23*
- Postmates 7
- Grubhub 18**

* Uber acquires Postmates
 ** Just Eat buys Grubhub



Deliveroo completes Series H funding round, now valued at over \$7bn January 17th, 2021

Just Eat Takeaway acquires Grubhub for \$7.3 billion to create largest food delivery firm outside China

June 10th, 2020

GRUBHUB™



Just Eat and Takeaway.com cleared to form £6.2bn food courier giant

Jan. 10th, 2020



DoorDash has a current Market Cap. of US\$65bn



JUST EAT



Imperial College London

Restaurant Meal Delivery Dominated By the Big 3 in the UK but there are Top End restaurant Specialists



Restaurant Meal Delivery Sector Value £9bn
With Over 12m Customers





Explore our Menu



Welcome to Ghost Kitchen Brands!

We freshly prepare well known and comforting food brands in one kitchen and location, optimized for online delivery and pick up.

A sleek new concept that brings your favorite comfort food brands to you!

Available online - in your town - in your mall - in your Walmart

Multiple brands. One Order. One Pickup. One Delivery.



Walmart opens first U.S. Ghost Kitchens foodservice location

September 3rd, 2021

BRANDS WE CARRY





Neolix's delivery robot / Photo: Neolix via WeChat



Image Credits: JD.com's delivery robot. Photo: JD.com



Meituan's self-driving delivery vehicle / Photo: Meituan via WeChat



Takeout deliveries may offer more choices.

Neolix, JD.com & Meituan delivering Groceries & Meals and vending KFC in China



Nuro delivering Groceries & Pizzas and Cruise (GM) delivering people in the USA



Cruise Origin driverless shuttle

Autonomous Delivery of People and Groceries Coming to a Town Near You soon!



Source: PepsiCo

PepsiCo US

A tactic traditionally used by start-up brands, global food and drink giant PepsiCo launched two direct-to-consumer e-commerce platforms featuring its portfolio of products in an effort to reach new consumers.

Bundles & Beverages

Your favorites all in one place, delivered right to your door. Enjoy free shipping on all orders!

[Shop All Bundles](#)



Food & Beverages for every occasion

Shop All Bundles



[Shop Now](#)

Beverages



[Shop Now](#)

Protein



[Shop Now](#)

Rise & Shine



[Shop Now](#)

Family Favorites



[Shop Now](#)

Snacking



[Shop Now](#)

Everyday Pantry



[Shop Now](#)

home cooked

Authentic homecooked food, delivered

Download on the App Store

GET IT ON Google Play

Hampstead
Kent
M62
John's Wood
CAMDEN
The Regent's Park
Regents Park
Saint Giles
on
Park

2 portions left

Chicken korma with basmati pilau rice

Indian

“Home Cooked” Food Apps Expanded in 2020



HomeCooked UK II How it works

Watch later Share

Watch on YouTube

THE APP

HomeCooked UK is a platform that enables people to purchase fresh home-cooked food prepared by professional or hobbyist cooks using the best quality ingredients with users being able to select from a multitude of cuisines and chefs in order to enjoy authentic home-cooked food.

Cook My Grub

Cook My Grub offers a refreshing new way to search and order fresh, authentic and healthy home cooked food and bakes in your local area

Top of the charts

Cuisines

Bookmarked

Home Cooked

Home Cooked

all about the cooks

home about become a cook food safety

discover cooks

£0.00

choose your food

Find real food made by local people

Living amongst us, talented people are making extraordinary food in their own homes. We've been searching for these people in Bristol, trying their remarkable dishes and finding out the stories behind them. We're ready to share who we've found so they can share what they cook with you.

HOMEMADE

Start your home based restaurant and sell your cuisine to hungry customers.

HelloFresh acquires Canadian meal kit company

Chefs Plate October 2018



HelloFresh acquires ready-to-eat meal company Factor75



November 27th, 2020



HelloFresh has agreed to buy Factor75, an Illinois-based firm that sells ready-to-eat meals oriented around health and wellness, according to a

Market Summary > Hellofresh SE

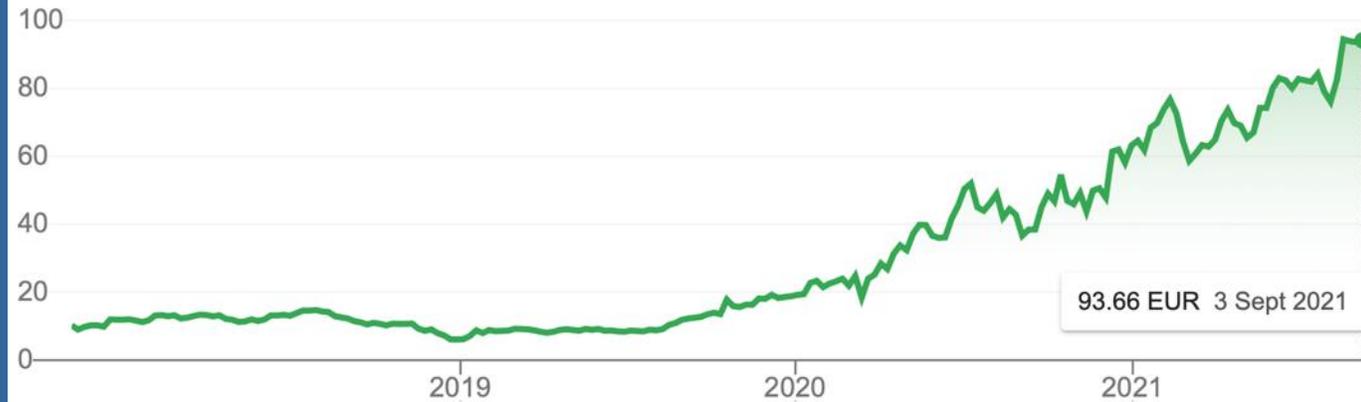
93.66 EUR

+83.41 (813.76%) ↑ past 5 years

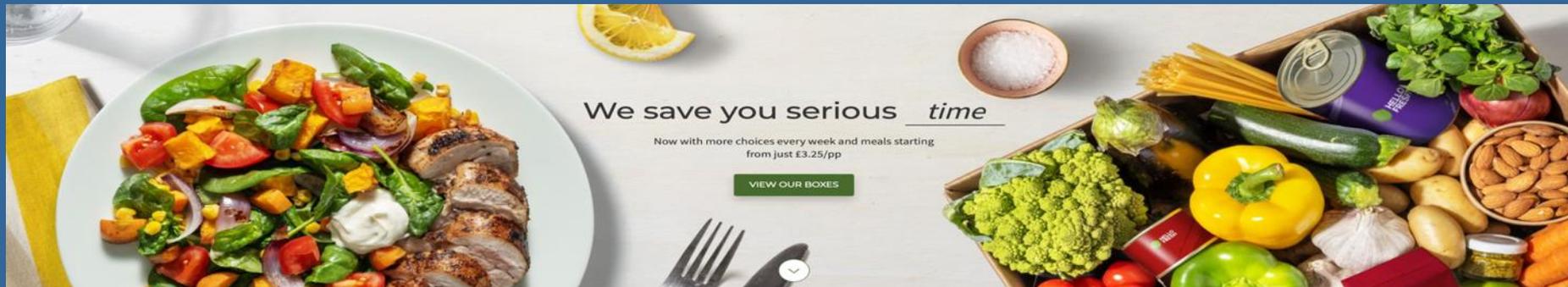
3 Sept, 17:35 CEST · Disclaimer



1D | 5D | 1M | 6M | YTD | 1Y | **5Y** | Max



HelloFresh Market Capitalisation: US\$18bn*



* Loblaw's Market Cap is us\$24bn

Nestlé buys Mindful Chef to bulk up direct-to-consumer portfolio

November 9th, 2020



Nestlé agrees to acquire recipe kit firm SimplyCook

February 23rd, 2021

SimplyCook sells more than 130 chef-designed recipes drawing on up to 18 different ingredients

Nestlé acquires prepared meal service Freshly to compete with HelloFresh, Blue Apron

Freshly was founded in 2015 and is now shipping more than 1 million meals a week to people in 48 states

October 31st, 2020



Nestlé buys US meal delivery company Freshly in \$950m deal



Cooking made simple



[Claim £3 Trial Box](#)

detox kitchen

FRESHLY PREPARED, DELICIOUS, HEALTHY MEALS DELIVERED TO YOUR DOOR



LOCAL INGREDIENTS. GLOBAL FLAVOURS.



RAINBOW POKE BOWL GREEN



GOJI GRANOLA WITH OAT MILK



VEGGIE BOLOGNESE



PROTEIN CLEANSE



VEGAN CLEANSE



GREEN CLEANSE



GREEN WITH PROTEIN CLEANSE



Imperial College
London

love is on the menu

DINE IN

with Fred Sirieix

Treat yourselves to a delicious dinner for two

Choose a

- STARTER
- MAIN
- SIDE
- DESSERT
- PROSECCO

ALTERNATIVE DRINKS AVAILABLE



£20
SERVES 2



Includes free chocolates!

FEB. 10-14, 2021

M&S
— FOOD —

M&S
EST. 1884



Valentine's Day Deal €23 per Couple That's a Cheap Date!

Rump steak with peppercorn sauce

21-day-matured tender rump steaks served with a tasty peppercorn sauce

Sirloin steaks with heart-shaped butter

21-day-matured juicy sirloin steaks served with a heart-shaped butter

Rack of lamb with mustard, honey and herb crust

Beautiful British lamb coated in a mustard, honey and herb crust

Plant Kitchen no-beef creamy peppercorn pie (Ve)

Pea protein in an indulgent peppercorn sauce, encased in flaky pastry and topped with...

Value of team purchase: Aggregating demand that would otherwise be dispersed

People's decisions can be dynamically influenced by their trusted sources as they do not always have strong preferences.



Join the Food Growing Revolution in our Cities

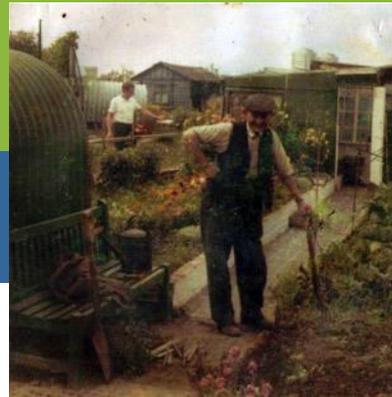


Find a space to grow your own food

Earn money by renting out your garden

Get your own Plot

Become a Host



HOW DO CONSUMERS SOLVE THEIR MEAL PROBLEMS?

FROM FOOD SERVICE

FORMAL SIT DOWN RESTAURANT

CASUAL DINE
QSR

STREET FOOD

SANDWICH / COFFEE SHOP CHAINS

**RESTAURANT
EAT OUT**

RESTAURANT DARK KITCHENS

DELIVERY "EAT OUT IN"

DELIVERY BRANDED MEAL

FOOD TO GO "TAKEAWAY"

STREET FOOD

**RESTAURANT
"EAT OUT IN"**

**COOKING
FROM
SCRATCH**

INGREDIENTS FROM SUPERMARKETS,
CONVENIENCE STORES, ON/OFFLINE
GREENGROCERS, BUTCHERS, ETC.

MEALS

REGULAR MEALS

MINI-MEALS

**FOOD RETAIL &
FOOD SERVICE
CONVERGE**

FROM RETAIL

MEAL COMPONENTS

MEAL SOLUTIONS

READY MEALS

MEAL KIT INSTORE

MEAL DEALS

MEAL KIT DELIVERED

**CONVENIENCE
COOKING**

**CONVENIENCE
NO COOKING**

SUPERMARKET RESTAURANT

DELICATESSEN COUNTER

FOOD TO GO SUPERMARKET

SUPERMARKET DARK KITCHEN

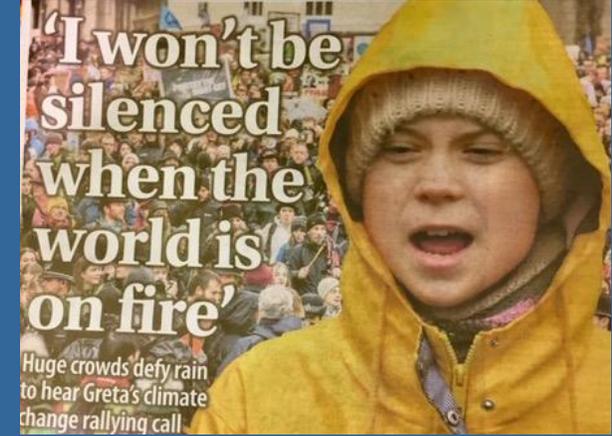
The Notion of “Climate-Friendly and Planet-Friendly Diets” are Gaining Substantial Traction. Just Ask Your Children/Grandchildren!



Global “Climate Change Strikes” Friday, September 20th, 2019

Student Climate Strikes Across Asia: “There Is No Planet B”

February 14th, 2020



Greta Thunberg: 'We are speeding in the wrong direction' on climate crisis Dec. 10th 2020

Youth climate strikes sweep Asia ahead of UN Climate Action Summit

September, 2019



April 23rd, 2021

‘Put her in charge of a continent or two’: Teen climate activist is lauded for powerful speech at White House climate summit

Mexican-born Xiye Bastida, 19, told world leaders that they 'need to accept that the era of fossil fuels is over'



Fridays for Future: how the young climate movement has grown since Greta Thunberg's lone protest



THE POWER IS ON YOUR PLATE



Health and environmental impacts of various foods

- Emphasized foods
- Optional foods
- Limited foods

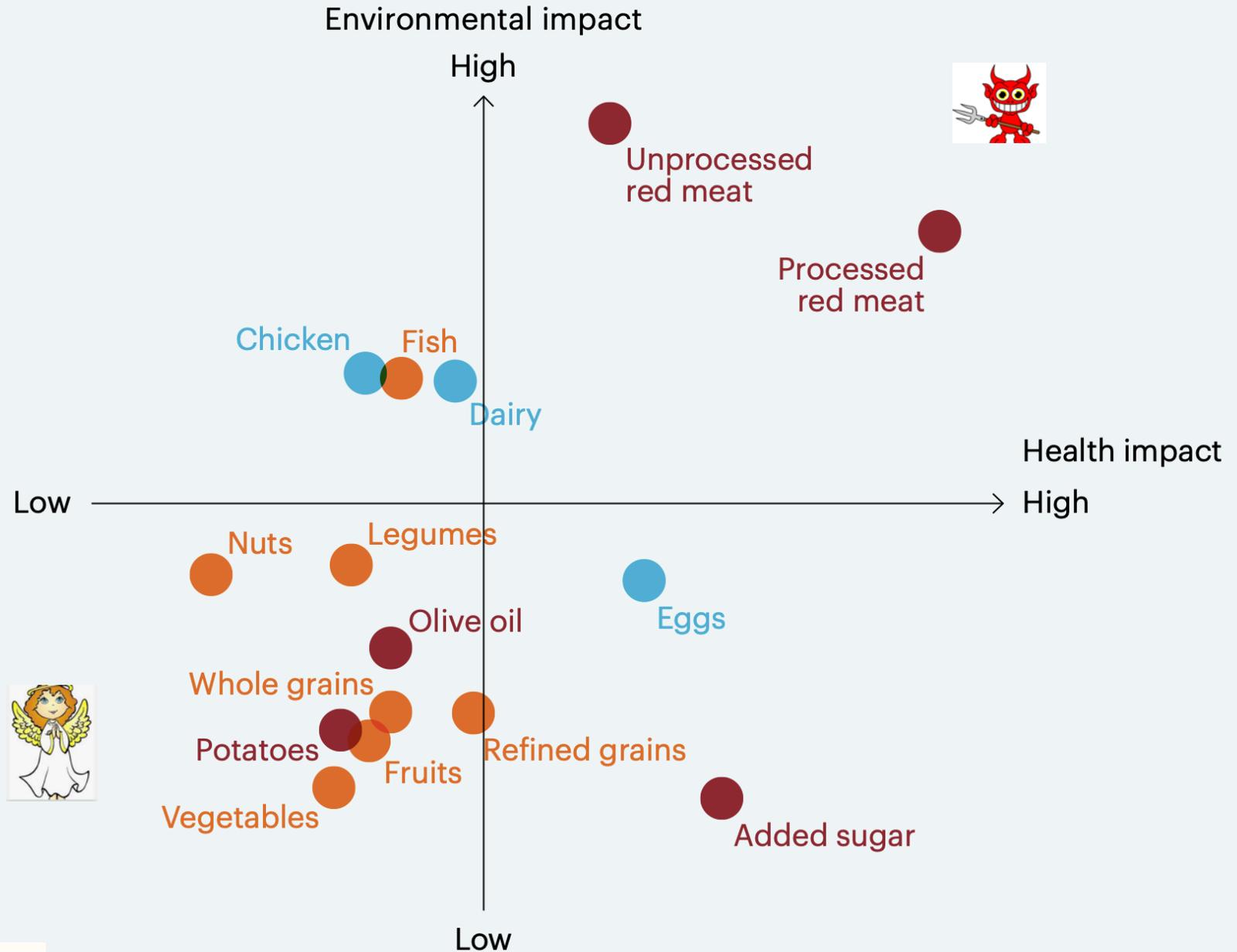
Diets for a Better Future:

Rebooting and Reimagining Healthy and Sustainable Food Systems in the G20

Figure 4.

The health and environmental impacts of various foods. Overconsumption of red and processed meats increases the risk to both human health and the environment. Plant foods tend to be good for both people and planet. Added sugar is a major driver of poor health but has much lower environmental impacts.

Source: Clark et al. (2019).¹⁷



Summer health drive in England as 40% say they gained weight in lockdown



The Unequivocal Evidence that Obesity and Diabetes Increase Health Risks Associated with Viruses will Increases Governmental Pressure on Citizens to:

- Eat Less and Much More Healthier;
- and Exercise More.

We Shall See MORE Regulation on Health Issues Related to Food (moving on from Nudging to Taxing!). UK Food Strategy Report Recommends Tax on Salt & Sugar Used in Food Processing.

Many Canadians gaining weight during COVID-19



Young people report snacking more and gaining weight during lockdown



Weight gain in Chinese youth during a 4-month COVID-19 lockdown



Canada's food guide **Eat well. Live well.**

Eat a variety of healthy foods each day

Have plenty of vegetables and fruits

Eat protein foods

Make water your drink of choice

Choose whole grain foods

Discover your food guide at Canada.ca/FoodGuide

China's 2016 recommended daily dietary intake

Dairy: 300g (11 oz)
 Legumes: 25-35g (1 oz)

Vegetables: 300-500g (11-18 oz)
 Fruit: 200-350g (7-12 oz)

Water: 1,500-1,700 mls (6-7 cups)

Salt: <6g (.2 oz)
 Oil: 25-30g (1 oz)

Poultry: 40-75g (1-3 oz)
 Seafood 40-75g (1-3 oz)
 Eggs 40-50g (1-2 oz)

Grains: 250-400g (9-14 oz)

Source: Chinese Nutrition Society

Queen's Speech 2021: Junk food adverts to be banned completely online and on TV before 9pm



May 11th, 2021

Government proposal to tackle obesity forms part of its promise to the NHS at the forefront of the recovery from the coronavirus pandemic



Fresh calls for regulation of junk food marketing in Germany: 'Voluntary commitments cannot work'

February 2021

Protejamos su salud,
no la comida chatarra



HCC Press Release: Stunning Outcome Amidst COVID-19 As Mexico and Chile Deliver Healthy Results on Policies for Front of Package Labelling on Packaged Foods and Beverages

Chile's drastic anti-obesity measures cut sugary drink sales by 23%

Experts welcome example of nation once drinking more per head than any other



▲ Bags of crisps, with warnings on calories and sodium level, on sale at a street stall in Santiago, Chile.





PepsiCo vows to cut sugar levels in sodas and launch healthier snacks in EU July 1st, 2021

PepsiCo has announced a series of pledges that includes cutting beverage sugar levels by 25% and introducing more nutritious snacks by 2025 in the EU.

The announcement comes amid increasing scrutiny over the nutrition of global consumer goods companies' products, and follows a document by Nestlé revealing that more than 60% of its mainstream food and drinks portfolio does not meet a "recognised definition of health".

PepsiCo seeks to reduce the average level of added sugars across its entire soft drinks range – including Pepsi-Cola, Lipton Ice Tea and 7Up – by 25% by 2025 and 50% by 2030, compared to a 2019 baseline.

Nestlé says over half of its traditional packaged food business is not 'healthy' in an internal presentation to top executives, according to a report May 31st, 2021



- **The majority of Nestlé's traditional food and drinks do not meet a "recognised definition of health."**
- **Just 37% of its consumer food and beverage products meet international health standards.**



New and improved products that will escape the HFSS ad ban



May 12th, 2021

As the government prepares to crack down on the promotion and advertising of high fat, salt and sugar foods, brands are launching healthier new products and reformulating existing lines to stay below the threshold

Shreddies 'The Simple One'



TRAFFIC LIGHTS FOOD LABEL GUIDE				
	SATURATED		SUGAR	
	FAT	FAT	SUGAR	SALT
HEALTHY CHOICE	LOW	3g or less	1.5g or less	5g or less

Simplicity is key for Nestlé's new Shreddies, which contain just four ingredients: wholegrain wheat, fruit purée, date syrup and "a pinch" of salt. As well as being non-HFSS, the cereal is high in fibre and boasts all green traffic lights. The supplier said the launch supported its "wider commitment to ensuring the majority of our cereals are non-HFSS by the end of 2021".

'Dismay' at govt go-ahead for HFSS ad restrictions for TV and online

Ad industry raised major questions about evidence to show restrictions will reduce childhood obesity.

Kellogg's to cut salt and sugar in push to boost health credentials



The cereal giant plans to remove 10% of the sugar from its kids' cereal range and at least 20% of the salt from the range, making them all non-HFSS by the end of 2022.

Dr Oetker unveils non-HFSS frozen pizza brand The Good Baker

September 2nd, 2021



Department of Health

What is an HFSS Product?

An HFSS product is a food or soft drink that is high in fat, salt or sugar as classified by the Department of Health (DoH) nutrient profiling model. Foods scoring 4 or more points and drinks scoring 1 or more are classified as HFSS.



They are all meat-free, non-HFSS and contain 340 - 384 calories per half pizza. Plus, they come in fully recyclable [packaging](#), with boxes made from FSC-certified recycled card.



**Taste & Convenience
ALWAYS
Trump Health
(and other mega-trends)!**



“Big Food” has had an Exceptional Sales Bonanza During Covid-19

Score: 8.8/10

In the end, the classic macaroni and cheese brand took the crown. That’s right, your standard box of Kraft is really the best packaged mac and cheese out there! Costing less than a dollar a box, we’re not complaining!

Ingredients

ENRICHED MACARONI PRODUCT (WHEAT FLOUR, GLYCERYL MONOSTEARATE, NIACIN, FERROUS SULFATE [IRON], THIAMIN MONONITRATE [VITAMIN B1], RIBOFLAVIN [VITAMIN B2], FOLIC ACID); CHEESE SAUCE MIX (WHEY, MILK, CORN SYRUP SOLIDS, MILKFAT, PALM OIL, MODIFIED FOOD STARCH, MILK PROTEIN CONCENTRATE, SALT, MALTODEXTRIN, CONTAINS LESS THAN 2% OF CALCIUM CARBONATE, SODIUM TRIPHOSPHATE, MEDIUM CHAIN TRIGLYCERIDES, DRIED BUTTERMILK, SODIUM PHOSPHATE, CITRIC ACID, CREAM, LACTIC ACID, CALCIUM PHOSPHATE, CHEESE CULTURE, NONFAT DRY MILK, GUAR GUM, WITH PAPRIKA, TURMERIC, AND ANNATTO ADDED FOR COLOR, ENZYMES, NATURAL FLAVOR, XANTHAN GUM); MODIFIED FOOD STARCH, MALTODEXTRIN, POTASSIUM CHLORIDE, ACETYLATED MONOGLYCERIDES, SALT, MEDIUM CHAIN TRIGLYCERIDES.

Clearly, Buying “Local” is a Trend accelerated by the Pandemic.
But, It Needs to be Convenient to Buy Local – Unless it’s a “Story Shop”!

How Covid-19 is changing consumers’
relationships with food

Why the local shopping trend will be even
bigger in 2021



In Tune with Immune





Fresh Produce with Immunity Benefits But Too Shy to Make Claims



Chobani doubles down on probiotics as consumers seek immunity-boosting products

December 15th, 2020

The dairy giant is debuting a line of yogurt cups and drinks that spotlight the microorganisms, as well as an extension geared toward children.





General Mills launches Good Measure snacks for consumers watching their blood sugar

June 29th, 2021



General Mills launched Good Measure, a new brand of snacks with ingredients that don't cause a spike in blood sugar. The line includes three variety of bars — Blueberry & Almond, Peanut & Dark Chocolate and Almond & Dark Chocolate — that are available on Amazon and at Hy-Vee stores in Minnesota.

BOL Are Brilliant. Fresh Produce Folk: This is Direct Competition. Up Your Marketing Game





Anthropomorphism Knows No Bounds!





DOSSIER DE PRESSE



LE B.A.B.A du mieux MANGER!



= **Goûter**
équilibré noté B

Voir composition détaillée à la fin

Carrefour and Colruyt Introducing Nutri-Scores On Private Label Products



How Would Your Products Score?



- The majority of Nestlé's traditional food and drinks do not meet a "recognised definition of health."
- Just 37% of its consumer food and beverage products meet international health standards.
- The global food company acknowledged the issue in an internal presentation seen by the Financial Times.

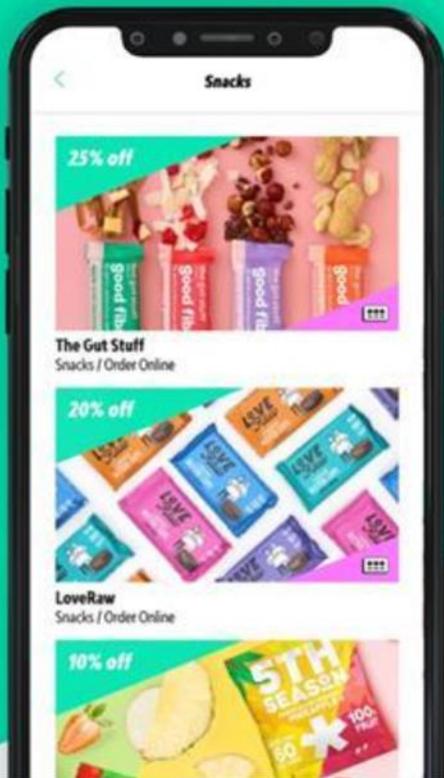
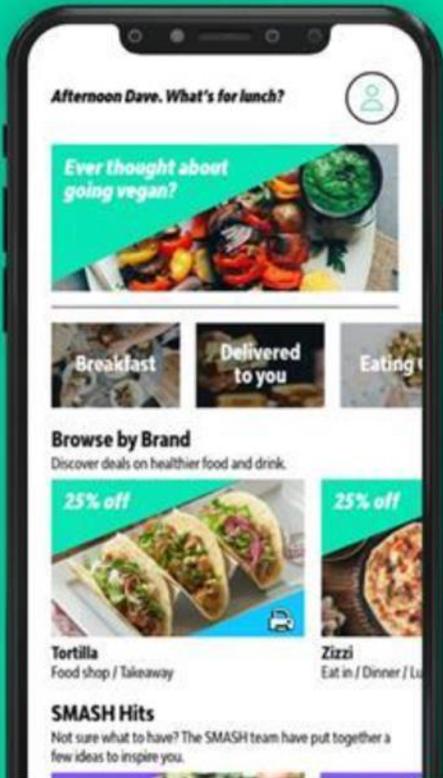


Imperial College
London



Smash: Healthy food discount app for young people launches

May 20th, 2021



Source: Smash
To access the app, which is available exclusively to 13 to 24-year-olds, users must take a selfie to pass a facial age scan



Eco Actives

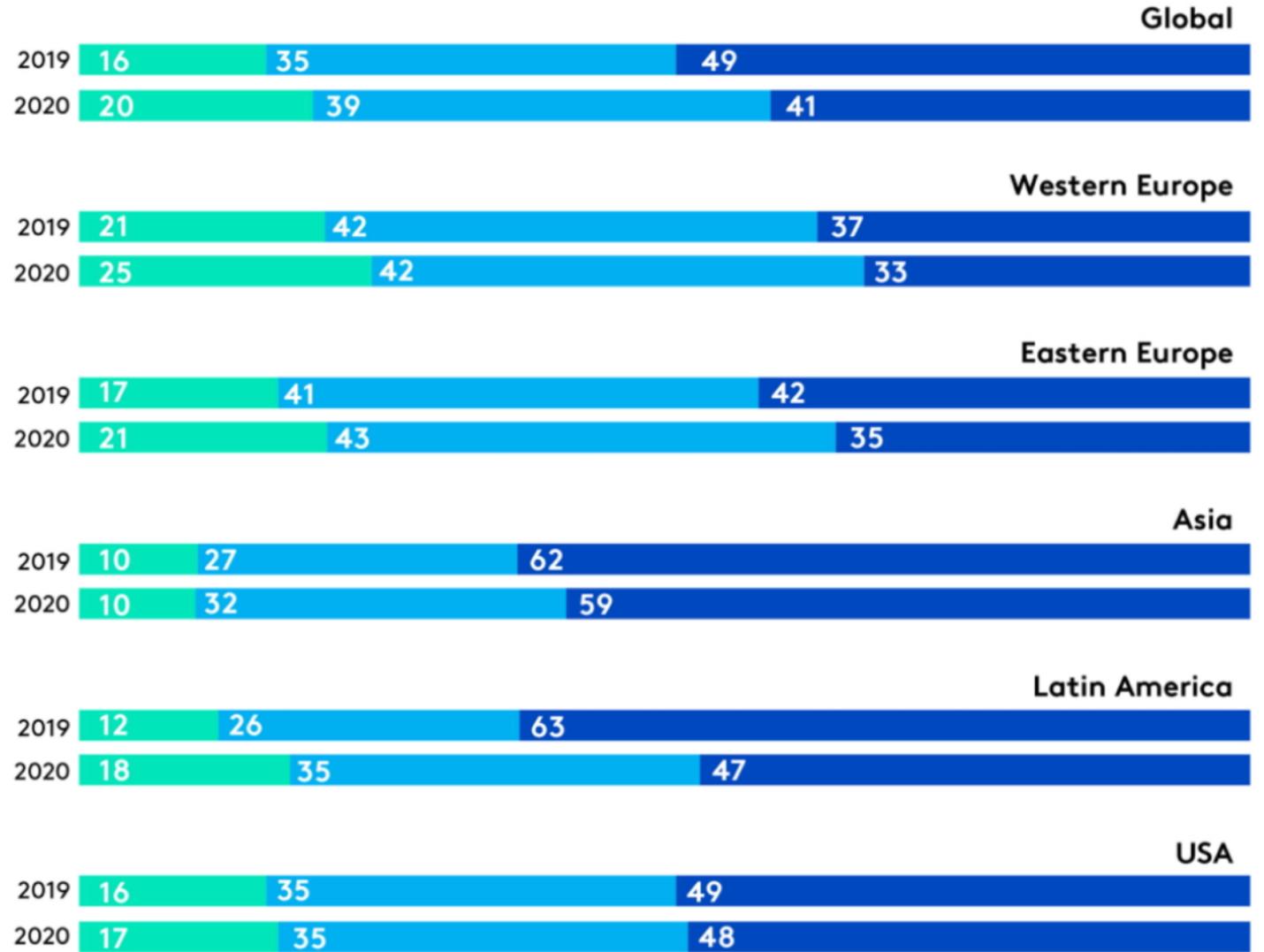


Eco Considerers



Eco Dismissers

% Buyers by Eco Segmentation





New store in Sweden prices goods based on carbon emissions

October 2nd, 2020

In a world first, major Swedish food brand Felix has launched its own grocery store where products are priced on their climate impact: the more the carbon dioxide emissions, the higher the price.



What's the "Enviro-Score" for Your Food & Drink Products?



And Eco-Scores are Next Up!



Eco-Score's European expansion: Lidl and Colruyt adopt environmental footprint labelling

April 11th, 2021



LIDL TO HELP CONSUMERS GO GREENER WITH NEW ECO-SCORE TRIAL IN SCOTLAND



Eco-Score labelling scheme gaining traction in Europe / Pic: GettyImages-Goran13

evocco HOME ABOUT FAQ BLOG



Track. Improve. Offset.
Take control of your food shopping's carbon footprint with the Evocco mobile app.

Get it on Google Play | Download on the App Store

*Hey hey! Evocco works best with receipts from supermarkets in Ireland and the UK for now. Request your country and city [here](#).

Track.
Photograph your food shopping receipt and get its carbon footprint score.

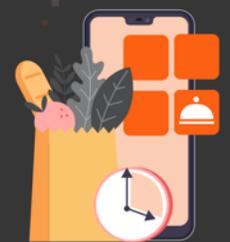


Setai App fills shopping cart up with sustainable food

YOUR CHOICE MATTERS
Discover the environmental and health score of the food you buy

SHOW THE WORLD THAT YOU'RE PART OF THE SOLUTION, NOT THE PROBLEM.

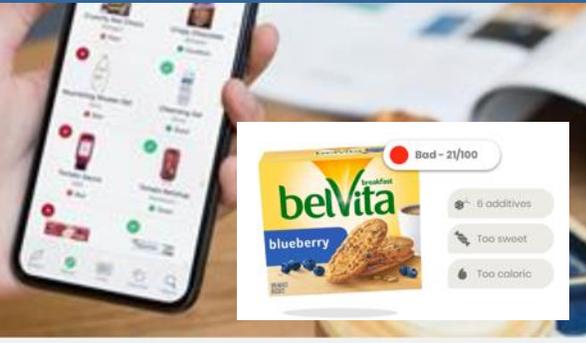
SEE WHAT YOU CAN DO



+65%
of British people say that they lack information to take sustainable decisions in their daily lives.

+30%
The food industry is responsible for more than 1/3rd of our carbon emissions.

Want to Know Nutrition and Environmental Scores for Your Food? There's an App for That!



Yuka 

The mightiest of European shopping apps, Yuka enables the scanning of 1.5 million products – 70% of which are food and drink, the rest cosmetics. Some five million products are scanned on a daily basis.

Giki 

Giki awards products badges, based on data provided by the manufacturer and referenced against more than 30 subject matter expert partners, such as RSPCA Assured, RSPO, Fairtrade and the Rainforest Alliance.

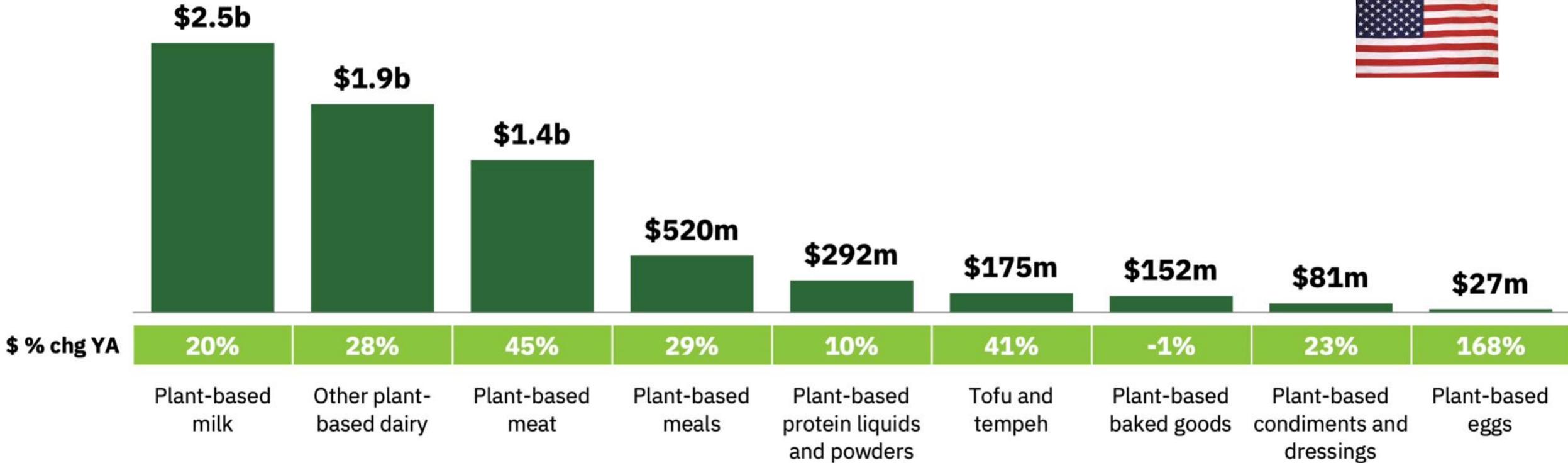


FOODSWITCH 

POWERED BY The George Institute for Global Health




Total U.S. plant-based food dollar sales and dollar sales growth by category, 2020



Note: the data presented in this graph is based on custom GFI and PBFA plant-based categories that were created by refining standard SPINS categories. Due to the custom nature of these categories, the presented data will not align with standard SPINS categories.

Source: SPINS Natural Enhanced Channel, SPINS Conventional Multi Outlet Channel (powered by IRI) | 52 Weeks Ending 12-27-2020





UK giant Unilever bets on vegan food with 'scary target'

November 2020



The company is betting on growing its plant-based meat brand The Vegetarian Butcher, which it acquired two years ago, and now sells in 30 countries.

It's through this brand that Unilever supplies Burger King's plant-based Whopper in 26 countries, with the fast-food chain having plans to sell its plant-based nuggets.

Unilever also wants to push its vegan dairy ranges, which include Vegan Ben & Jerry's ice cream, Magnum Vegan, Vegan Cornetto, and Hellmann's Vegan mayonnaise.



One of the UK's biggest consumer goods firm is betting on more people eating vegan food and has set itself a "scary target" to increase sales.

Unilever wants to increase its annual sales of plant-based meat and dairy products five-fold within seven years, hitting €1bn (£900m) by 2027.

Unilever's The Vegetarian Butcher expands plant-based Whopper roll out in Latin America, the Caribbean and China

January 6th, 2021

In the UK, there has been exponential growth in vegan food sales with sales of meat-free products in the UK up from £488m last year to £577m this year, according to analyst firm Kantar.



For Nestlé, the future of food is rooted in plants September 2nd, 2020

The Switzerland-based company is investing heavily in its Sweet Earth brand and other plant-based offerings to grow in a segment populated by heavyweight competitors and nimble upstarts.



Sweet Earth adds bacon to make its plant-based burger more Awesome July 17th, 2020 



Nestlé launches plant-based Vuna with 'rich flavour and flaky texture of tuna' August 20th, 2020

Sleep and relaxation supplements soar due to COVID-19 stress

PepsiCo wants to help the caffeinated masses get better sleep with its new relaxation drink

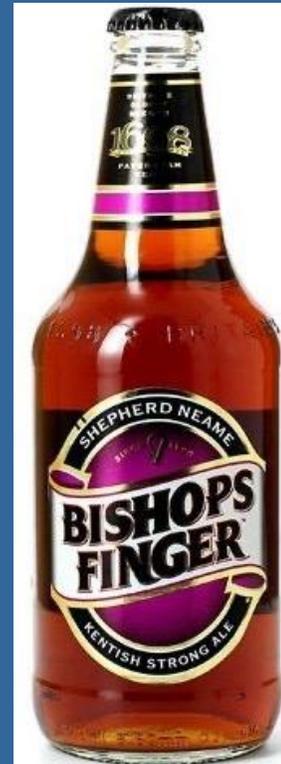
Say hello to Driftwell. The perfect nighttime antidote to . . . soda? September 2020



[Photo: PepsiCo; rawpixel]

PepsiCo launches functional sparkling water drink Soulboost

May 5th, 2021



PepsiCo pursues trademark for Rockstar-branded beer and hard seltzer, Bloomberg reports

June 21st, 2021

My Choice

Imperial College
London



PepsiCo's Mountain Dew brand increased sponsorships with esports leagues and advertises on Twitch and Facebook, spending 40% of marketing dollars in 2019 to reach gamers.



Source: PepsiCo



PepsiCo Focus on Gamers.
Niche Market?
There's 3bn Worldwide!



Big Food has been Busy Buying Up Little Food!



General Mills and GoodBelly partner to launch probiotic cereal, yogurt
July 2019



EDLINE
EMERGING BRAND ELEVATOR
Elevating great ideas

no cow.
NO COIL. NO KILL. NO WASTE.
kite hill
Plant Based Antipasto

Mars snaps up remainder of US snacks maker Kind



November 18th, 2020



KIND causes

communities

We believe when you feel good inside, you want get out and do good outside. So we use our bars to inspire acts of kindness. To foster communities. And to fuel our movement.



Mondelez Agrees to Buy Rest of Paleo Chocolate-Bar Maker Hu 

Maker of Oreo cookies and Ritz crackers has been adding to its snack portfolio as consumers' tastes turn toward healthier fare

January 5th, 2021



Mondelez International

Mondelez takes minority stake in Hu through SnackFutures program

April 19th, 2019



Danone Manifesto Ventures buys majority stake in Harmless Harvest July 1st, 2021





Gosh! Food unveils new plant-based Snack Bites in the UK



September 8th, 2021

Sonae acquires Gosh! Food owner for around £64m

Seaweed-based vegan burgers hot dogs hit Albert Heijn in nautical-themed packs



19 Feb 2021 --- The Dutch Weed Burger is launching two of its seaweed-based meat alternatives, Weed Burger and Weed Dogg, at 300 national Albert Heijn supermarket chains next week.

The Weed Burger patty is made from protein-rich, salty soy chips and enriched with Royal Kombu. Its Weed Dogg counterpart is based on meaty toasted peas and blanched oyster mushroom, creating a texture reminiscent of a bratwurst.

The seaweed used in The Dutch Weed Burger's offerings is sustainably cultivated at Oosterschelde National Park, the first organic seaweed farm in the Netherlands.



1+ weeks

Tesco Medium Beef Roasting Joint With Basting Fat



4+ days

Tesco Diced Beef 600G

THE VEGETARIAN BUTCHER™

Vegetarian
LITTLE WILLIES

high protein soy-based sausages



per 100g
Energy 566kJ / 134kcal
Fat 7.8g
Carbohydrate 8.5g
Sugars 1.2g
Salt 1.1g
Energy per 100g 632kJ / 151kcal

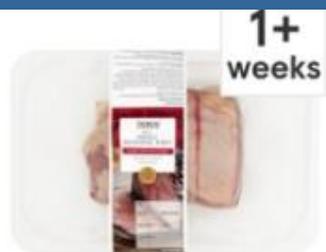
THE VEGETARIAN BUTCHER™

Vegan
WHAT THE CLUCK

high protein soy-based chicken-style chunks



160g



1+ weeks

Tesco Small Beef Silverside Roast Joint 500G



1+ weeks

Tesco Beef Brisket

THE VEGETARIAN BUTCHER™

Vegetarian
UNBELIEVABULL BURGER

high protein soy-based beef-style burger



per 100g
Energy 643kJ / 154kcal
Fat 8.7g
Carbohydrate 11.7g
Sugars 1.2g
Salt 1.0g

Use by:

Keep refrigerated



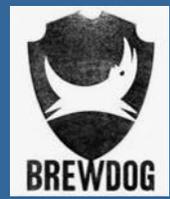
THE VEGETARIAN BUTCHER™

Vegan
LITTLE PECKERS

top-seeded chicken-style nuggets
source of protein



180g



Brewdog invests £30 million in green initiatives



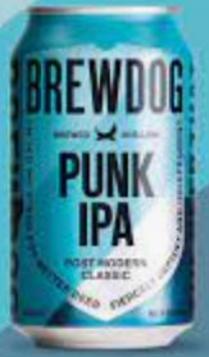
August 2020

FUCK YOU CO₂

BREWD OG BEER IS NOW CARBON NEGATIVE

brewdog.com/tomorrow

**MAKE EARTH
GREAT AGAIN**



Brewdog boss vows to learn after
'toxic culture' criticism June 11th, 2021

Imperial College
London



UN report reveals 17% of all food available at consumer level is wasted



08 Mar 2021 --- An estimated 931 million metric tons of food, or 17 percent of total food available to consumers in 2019, went into the waste bins of households, retailers, restaurants and other food services, according to new UN research conducted to support global efforts to halve food waste by 2030.



The Food Waste Index report helps countries track progress on UN Sustainable Development Goal 12.3 to halve food waste by 2030.



Data points relating to households

Kg per Capita

United Kingdom of Great Britain and Northern Ireland

(WRAP, 2020b)

77

High

Data points relating to food service

United Kingdom of Great Britain and Northern Ireland

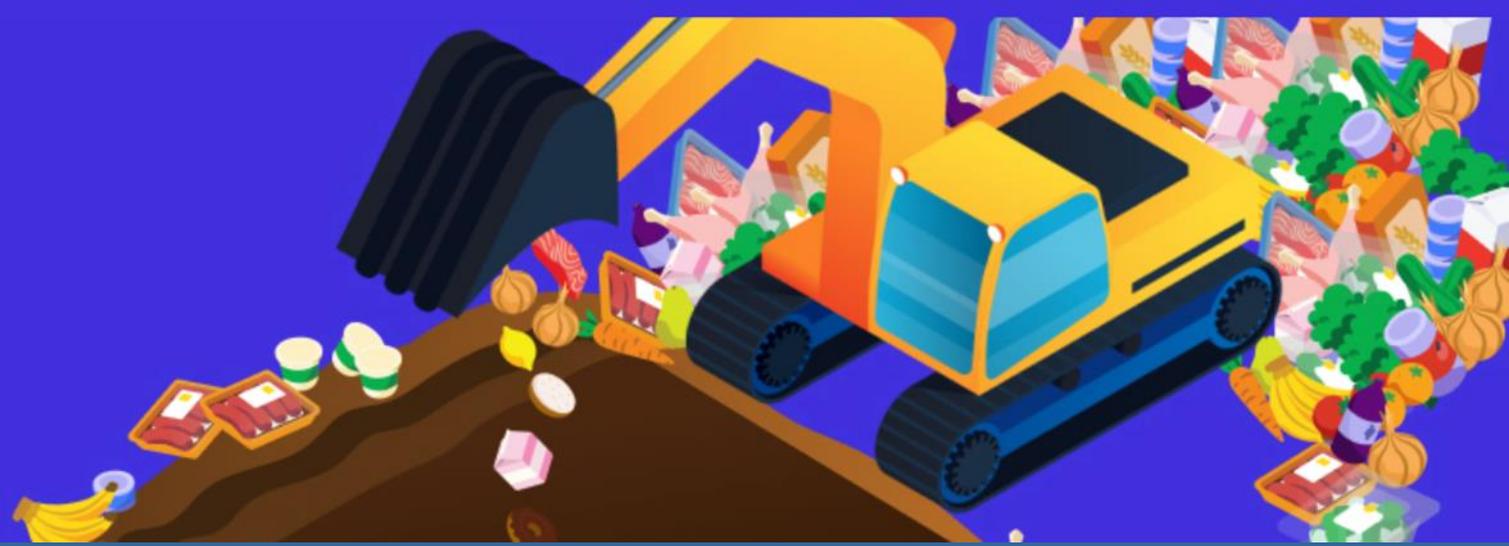
(WRAP, 2020b)

17

High

Did you know?

160 000 000 000
pounds of food in North
America end up in the
landfill



Flashfood

HOW IT WORKS LOCATIONS ABOUT SUPPORT PARTNER DOWNLOAD

**Save money and
fight against food
waste**

Get massive savings on fresh food items like meat and produce that are nearing their best before date at grocery stores across Canada and the U.S.

Download on the App Store GET IT ON Google Play How it works >



meijer

GIANT

Tops

Martin's
Count On Us!

FAMILY
FARE.

giant
eagle

STOP&SHOP

MARTIN'S

Loblaws

REAL CANADIAN
SUPERSTORE

Flashfood

**Save money
and fight
against food
waste.**



Imperial College
London



Frugalpac UK Paper Wine Bottle



Nestlé Goes Paper on Confectionery



Nature Valley makes recyclable wrappers for granola bars



Courtesy of General Mills



These new McDonald's trays are made from food waste

At franchises throughout Latin America and the Caribbean, you'll now get your food served on an innovative new material.

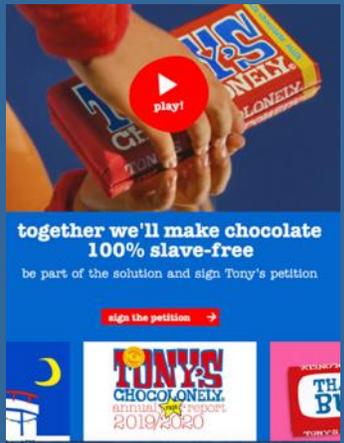




Social Pressures Dictating Choice Remind Me Again What We Can't Eat?:

- Anything with palm oil as an ingredient
- Chicken that's been fed soy from Brazil
- Fish that is unsustainably sourced
- Any meat/milk with hormones/antibiotics
- Food produced with slave labour
- Food produced by poorly paid farmers
- Water-intensive crops
- Eggs produced by hens in cages
- Eggs from “culled male chick” flocks
- Beef that has destroyed the Amazon
- Pork from pigs confined in stalls
- Anything in a non-recyclable pack

JBS among meat firms linked to slavery-tainted ranches in Brazil  January 5th, 2021



Supermarkets

- Germany: Rewe / Penny
- Netherlands: Jumbo
- France: Carrefour

Barn / Free range / organic
Choice for consumer
Price: example Jumbo in NL is + 2 to 4 eurocent/egg

Post-Covid, What are the Major Social Issues which will Disturb Growth in Your Food & Drink Markets?



Kroger drops coconut milk amid monkey allegations



June 21st, 2021



Kroger, which operates several regional supermarket chains in 35 states, is the latest pledging not to stock coconut products from Thai suppliers who have been accused of using monkeys as forced labor, officials from the People for the Ethical Treatment of Animals exclusively told USA TODAY.



PETA protests the use of monkeys to pick coconuts. Demonstrations have occurred at Kroger's stores and its Cincinnati headquarters.



Danone extends regenerative agriculture program, furthering its pledge to climate change

December 22nd, 2020

We will advance regenerative agriculture on 1 million acres of farmland by 2030.



McCain Foods unveils raft of sustainable agriculture pledges

July 14th, 2020



Unilever · Follow

22 April at 10:35 · 🌐

We've been working on sustainable agriculture for decades. But with the planet being pushed to its limits, we're taking things to a whole different level. We have launched new Regenerative Agriculture Principles – a guide to growing the ingredients for our products in harmony with nature. https://www.unilever.com/news/news-and-features/Feature-article/2021/how-we-will-grow-our-ingredients-in-harmony-with-nature.html?utm_source=UF&utm_medium=Social&utm_campaign=AlwaysOn See less

Nestlé targets regenerative agriculture in €3bn climate plan

December 3rd, 2020



PepsiCo Announces 2030 Goal to Scale Regenerative Farming Practices Across 7 Million Acres, Equivalent to Entire Agricultural Footprint

Company's Efforts Estimated to Reduce At Least 3 Million Tons of Greenhouse Gas Emissions by the End of the Decade

PepsiCo's Positive Agriculture Ambition Aims to Deliver Impact for the Planet & People by 2030

- 100% sustainably sourced key ingredients
- 7 million acres of land farmed with regenerative farming practices*
 - Estimated at least 3 million tons GHG emissions reduced
 - Approximately the size of our agricultural footprint
 - *A set of practices that improve and restore ecosystems
- 250,000+ livelihoods improved in our agricultural supply chain

Healthy soil grows sustainable ingredients, which improve livelihoods

WE WILL TRACK OUR PROGRESS TOWARD THESE GOALS, MAKING A MEASURABLE IMPACT IN:

- Building soil health and fertility
- Sequestering carbon and reducing emissions
- Enriching watershed health
- Protecting and enhancing biodiversity
- Improving farmer livelihoods

Soil & Water Resources Specialization

Soil & Water Sciences are Seriously Fashionable!



PepsiCo's Net Water Positive Vision

Reduce Use + Replenish More



Efficiency

Achieve **best-in-class¹** or **world-class²** water-use standards at all company-owned and third-party facilities by 2030

Over 11 billion
liters of water a year avoided¹

50% reduction⁴
in water use at PepsiCo sites³

Nearly half
of sites located in high-
risk watersheds



Replenishment

Replenish more than **100% of water** used at all high-water-risk sites by 2030



Safe Water Access

Provide **100 million people** with safe water access by 2030



Alliance for Water Stewardship Standard

Adopt in **high-water-risk areas** where PepsiCo operates by 2025

¹ 1.2 liters of water per liter of beverage or 0.4 liters per kilogram of food (high-water-risk manufacturing sites only)

² 1.4 liters of water per liter of beverage or 0.4 liters of water per kilogram of food (all other manufacturing sites)

³ At company-owned manufacturing facilities in high-risk watersheds and compared to a 2015 baseline

⁴ Based on estimated reductions in water use at high-water-risk PepsiCo-owned facilities of 80% at snack facilities and 90% at beverage facilities against a 2015 baseline

⁵ At company-owned manufacturing facilities in high-risk watersheds and against a 2015 baseline



We're crafting
the foods
+ beverages
you love
**with less
water
than ever.**



PEPSICO



**PEPSICO
FOUNDATION**

We Feed Potential



Kale



to the rescue

This amazing herb doesn't just help keep your bones healthy, its roots also help keep the soil healthy as it grows too. So let's eat the world better. One plate at a time.



Consumers can trace coffee beans through new blockchain app January 6th, 2020



Credit: *Coffee cup to go*



LEADING BRANDS
IMMERSE PEOPLE IN
THE STORY



ORIGIN GIVES
REASSURANCE OF
QUALITY AND SAFETY

Tech Giant IBM Unveils 'Thank My Farmer' App for Coffee Drinkers



Mars teams with NSIP for 100% sustainable cacao supply chain January 9th, 2020





Unilever promises living wage across value chain and €2bn towards diversity January 21st, 2021

Unilever unveils deforestation-free supply chain promise

December 22nd, 2020



Unilever has also teamed up with Google Cloud to capture satellite images of the forests, biodiversity and water cycles that intersect the company's supply chain, a partnership which, according to the company, will help raise its sustainability standards and allow it to see a more complete picture of the ecosystems connected to the raw materials the company sources from around the world.



Purpose/Values/Mission Marketing: Building an Empathetic Link with Your Consumers



HOW IT WORKS
Every time you make a purchase, we send a packet of life-saving food to a child in need.

THIS SAVES LIVES





© Md. Zakirul Mazed

Highly Commended Politics of Food © Md Zakirul Mazed Konok, Bangladesh

Having lunch in the garbage

Imperial College
London



CONTACT POINTS:

e-mail: profdavidhughes@aol.com

Telephone contact:

Mobile/Cell +44(0)7798 558276

 @ProfDavidHughes

Retail Blog: www.supermarketsinyourpocket.com

