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F2F Health Matters

F2F Health Matters: International development of innovative European healthy food, and sustainable bio-based techno-functional ingredients and solutions, and bio-solutions in new global markets

D1.10 Market Intelligence Reports for SMEs –UAE

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MARKET INTELLIGENCE
REPORT

FOOD AND BEVERAGES UAE 2024



Funded by
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INTERNATIONAL



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SCOPE

This document provides specific information on the UAE market and the opportunities for the companies that have been selected as Champion SMEs in the healthy and functional food and beverages and food supplements sectors.

The main objective is to support the preparation of the International Trade Mission to United Arab Emirates . The information will be brief, concrete and adapted to the SMEs that will participate in this mission.

To this end, the report provides information on new products launched in the market, trends, and regulations.

These market readiness reports will be useful to reassure SMEs about the opportunities in the specific market, and to ensure that they are well informed and prepared for the mission.

Targeted SMEs divided by sectors and sub-sectors

| Category | Subcategory | Companies | |
|------------------------------|---|---------------------|---------------------|
| Ingredients | 1.1 Algae / micro algae | Algolesko (FR) | Astrofood (BE) |
| | 1.2 Biosolutions | Biodevas (FR) | |
| | 1.3 Raw Materials | Vanilla fair (FR) | |
| Supplements | 2.1 Healthy nutrition and premium supplements | Sluke Sydrip (SK) | Roal group (SK) |
| | 2.2 Plant base alternative | Yogan Creamery (PT) | |
| Gourmet and healthy products | 3.1 Seafood frozen | Cabomar (SP) | |
| | 3.2 Sweet bakery | Dely wafels (BE) | Casa Rosarinho (PT) |
| | 2.3 Snacks (Nuts) | Pistacyl (SP) | Quival (SP) |
| | 2.4 Dairy | Yogurt Kitchen (BE) | |
| | 2.5 Oil | Acushla (PT) | |

1 ECONOMIC OUTLOOK AND ECONOMIC POLICY DEVELOPMENT

The UAE were able to recover from the COVID-19 crisis faster than many other economies. To achieve this substantial economic recovery, the UAE implemented fiscal and monetary stimulus packages up to mid-2022. The size of the fiscal package amounted to about 2.5% of the national GDP. The *Targeted Economic Stimulus Scheme* – the UAE's monetary stimulus package – had a size of about 19.5% of the GDP and provided temporary loans to companies and private individuals during the pandemic. These packages showed extraordinarily effective, as the UAE were able to achieve a 3% growth of GDP in 2022 according to the *International Monetary Fund* (IMF)¹.

Additionally, strong recovery post COVID-19 in the GCC countries was driven by the growth of non-oil sectors and the increase that oil prices have temporarily witnessed, which has accelerated during 2022 in parallel with the progressive cancellation of oil production cutbacks in accordance with *OPEC+* agreements.

The favorable conditions of the oil market have reduced the imbalances that affected the GCC countries' public finance and external accounts, while their export revenue witnessed a recovery. The medium-term future prospects are still liable to risks arising from oil sector fluctuations.

The UAE announced and implemented a number of economic, societal and political reforms:

- **Visa:** New visa rules were implemented in 2023, which now offer a wide array of different categories. Of special interest are the new "Green Visa", which is directed at well-educated individuals, as well as the "Gold Visa", allowing doctors, scientists, creative people of culture and art, inventors, executives, specialists in scientific fields, athletes, doctoral degree holders and specialists in the fields of engineering and science to stay in the country for a five-year period without needing a sponsor.
- **Emiratisation:** With the *Ministerial Decision No. 279* of 2022, the UAE enforce the *Emiratisation* of the private sector. While Emiratisation has been a policy focus of the UAE for years, the UAE *Ministry of Human Resources & Emiratisation* implemented a directive by January 2023, stating that companies will need to have an employment rate of at least 1% filled by Emirati citizens by July 7th. This rate is set to increase by 1% every six months, thus creating an Emiratisation percentage of 10% by 2027. Companies with less than 50 employees remain exempt.²
- **Unemployment:** In order to retain talents in the country, UAE February 2022 labour law implemented a major change: employees can now stay in the country for 90 days after their work visa cancellation instead of 30 days as before. Also, starting from June 2023, it's mandatory for employees on long term basis (except domestic workers, retired or entrepreneurs) to have unemployment insurance, which guarantees 3 months of salary in case the employer fires the employee. Workers with a basic salary of AED 16,000 or less will need to pay a monthly insurance premium of AED 5. The compensation for this category must not exceed a monthly amount of AED 10,000. Those with a basic salary exceeding AED 16,000 will need to pay AED 10 per month. The compensation for this category must not exceed AED 20,000 monthly.
- **Corporate Tax:** In June 2023, the UAE is implementing a 9% *federal corporate income tax* (CT). To businesses working on a financial year, UAE CT will apply from June 1st, 2023, while for businesses operating on a calendar year, UAE CT will apply from January 1st, 2024. Exemptions from the tax will be granted to companies with yearly turnovers of less than 370'000 AED as well as to companies in the natural resource sector, which will be taxed on a local Emirate based tax and not a federal tax. This federal corporate income tax comes only a few years after the UAE implemented a *Value-Added Tax* (VAT) of 5% in 2018 and shows the country's eagerness to diversify its income streams.

In March 2022, the UAE was put on the so-called “Grey List” of the *Financial Action Task Force* (FATF)³. Besides potential economic ramifications, this lower classification has been a major image problem for the two financial centres of the country, the *Dubai International Financial Centre* (DIFC) and *Abu Dhabi Global Markets* (ADGM), which have positioned themselves as the financial hubs of the region.

The UAE Government has made strong political commitments to strengthen the country’s *Anti Money Laundry* (AML) and the *Counter Terrorist financing* (CTF) and agreed with the International Co-operation Review Group on an action plan to address the issues identified by FATF.

However, in March 2023, the UAE was again placed on the *Jurisdictions under Increased Monitoring* list. Indeed, the FATF advised that the UAE should continue to work to implement its FATF action plan by enhancing and maintaining a shared understanding of the ML/TF risks and demonstrating a sustained increase in effective investigations and prosecutions of different types of ML cases.

The war in Ukraine has also left its mark on the UAE as the country, and especially Dubai, has become a hotspot for mostly Russian citizens seeking to safely park and invest their financial assets. Major investments have been made in real estate, with market prices shooting up significantly in Dubai (rents by 26%, property prices by 14.5% according to unconfirmed reports)⁴. There has also been a major inflow of crypto assets in the month of March 2022 when the Emirate of Dubai announced that they are implementing regulations for a crypto market in that same month.

In the context of the Ukraine war, the UAE has been able to profit from the initially high, volatile oil price since March 2022. While prices are down to around \$68/b in June 2023, they have partially reached the \$130/b mark, which is the highest prices for oil since 2008.⁵ Several OPEC+ members, including the UAE, announced important oil production cuts in the beginning of April 2023 to stabilize the falling prices. The UAE have also been able to leverage the price cap imposed on Russian oil at \$60/b by importing cheap Russian oil for internal use while maximising export of more expensive Emirati oil.⁶

2 AGRI-FOOD AND BEVERAGE INDUSTRY IN UAE

Agriculture absorbs 60% of the UAE's water resources, but accounts for less than 1% of the country's GDP. Water scarcity, urbanisation, desertification and industrialisation mean that agricultural land is very limited. The available fertile land area in the UAE is 0,41% of the country's total land area and more than half of the country's arable land is unused. Abu Dhabi is the emirate with the largest concentration of arable land (78%), with the Al Ain area having the greatest diversity of crops produced by modern agricultural methods and technology.

Therefore, **UAE relies heavily on imports of agri-food and seafood products to meet domestic demand** (due to its extremely hot climate and the high salinity of its scarce water resources). As a result, about **90% of the food consumed in the country is imported**. At the same time, the country is an important re-export market for other countries in the region, with **up to half of the food products imported into the UAE being re-exported out of the country**.

Different factors have been boosting the consumption of food in the region over the last few years, such as the high level of disposable income, the rising of the tourism, the growing population and evolving consumer preferences.

However, the Covid-19 pandemic had a great impact in tourism and HORECA, opening new opportunities like online food deliveries but causing immense damage to the sector with the restrictions on restaurants.

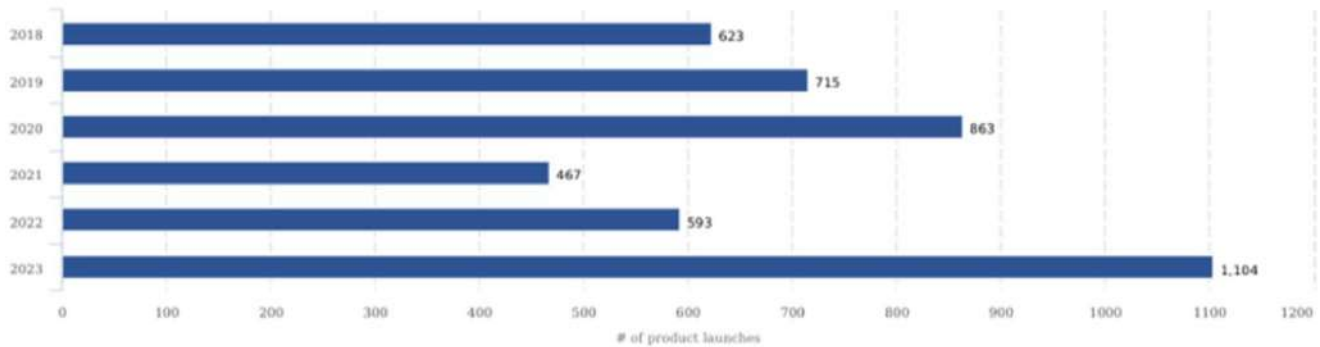
The impact of a multicultural tourism and foreign workers generate a demand of new products in the market, most of them produced overseas

The UAE market is a very competitive one, with a high number of innovations in the last five years



Shurooq Pure Sunflower oil in a 1.5 PET jug
United Arab Emirates
Oct 2023

Products launched on the UAE market by year 2018-2023
Source Innova Market



The Emirati diet is based mainly on grain (specially rice), dairy, meat (chicken and small fowl, goat and camel mainly) and some vegetables that are not difficult to grow like tomatoes or cucumbers. Other ingredients like dried lemons called "loomi" are also used in several dishes of the local gastronomy.

Regarding local production, the main domestic crop in the UAE are dates, followed by fresh vegetables. Animal domestic livestock, goats, sheep and chickens represent 88,7% of the local production, while camels and cattle represent 11,3% combined.

The top global partner for food and beverages is India, followed by the United States of America and Saudi Arabia. **The main EU supplier of the UAE in this category is France.** In 2020, the top food and beverages products exported to the UAE were milled rice, canola seeds, food preparations, and cigarettes.

The EU has a positive trade balance with the UAE, mainly due to the fact that the country has limited food production and is highly dependent on foreign trade to meet the local demand of agri-food and beverages.

Recent years have seen an expansion of food retailing driven by hypermarkets, supermarkets, grocery shops, online retailing, home delivery services and customer loyalty programmes.

Hypermarkets are the most popular retail sector among consumers due to discount and promotional programmes. However, online retailing is showing significant growth, especially after COVID-19.



Kiri Al Jarra Spreadable Cream Cheese

United Arab Emirates
Nov 2023



Lusine Cheese Croisant
United Arab Emirates
Dec 2023

In 2019, the UAE had 568 food and beverage processors. These factories produce 5,96 million metric tons of food and beverage products annually. This sector relies heavily on imported products and ingredients and plays an important role in the government's efforts to improve food security and self-sufficiency in commodities (dairy products, pulses, nuts, cooking oil, dates, poultry and eggs, fish, sugar, tea, baby food, wheat, rice, coffee, fresh meat, fruits and vegetables).

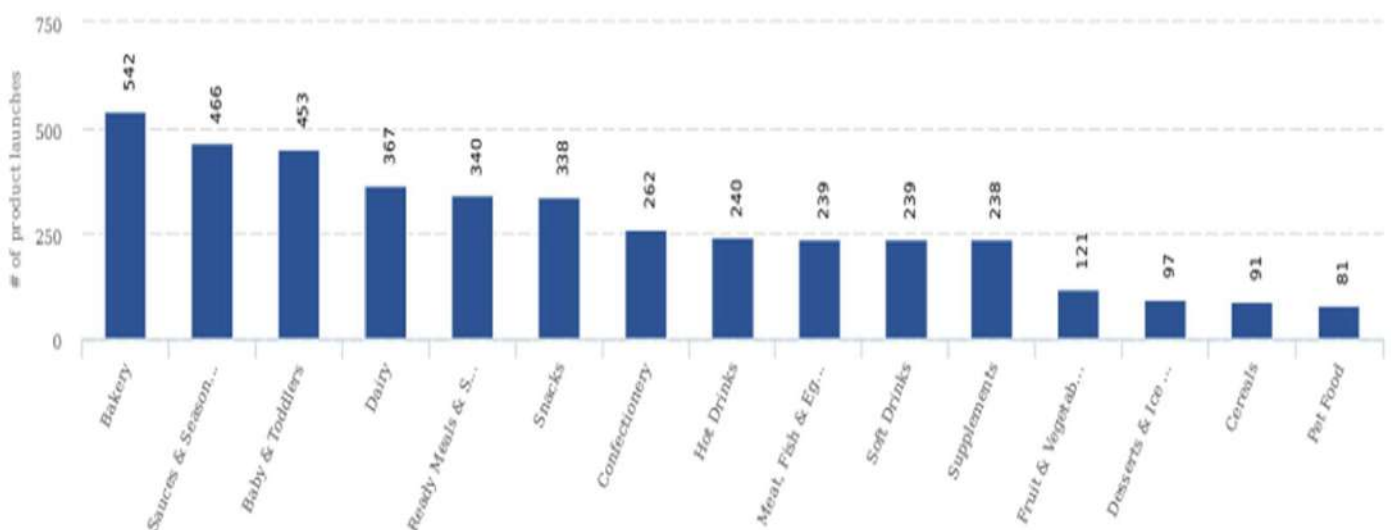
Some locally produced foods are of very high quality with competitive prices compared to imported products.

There are a wide range of varied international ingredient needs due to income differences between lower and higher income earners in the UAE, as well as the wide diversity of ethnic groups.

In 2019, imports of bulk and intermediate agricultural products amounted to 2,5 billion USD and included: dextrins, peptones, proteins, vegetable oils, sugars, sweeteners and beverage bases, soybean oil, essential oils, and ground grains and products.

Despite its dependence on imports of all types of food, **the agri-food sector in the UAE is a mature and highly competitive sector.**

Innovation on the UAE market by category 2018-2023
Source Innova Market



3 OPPORTUNITIES FOR AGRI-FOOD AND BEVERAGE INDUSTRY IN THE UAE MARKET

The UAE remains the region's most attractive market for food and beverages.

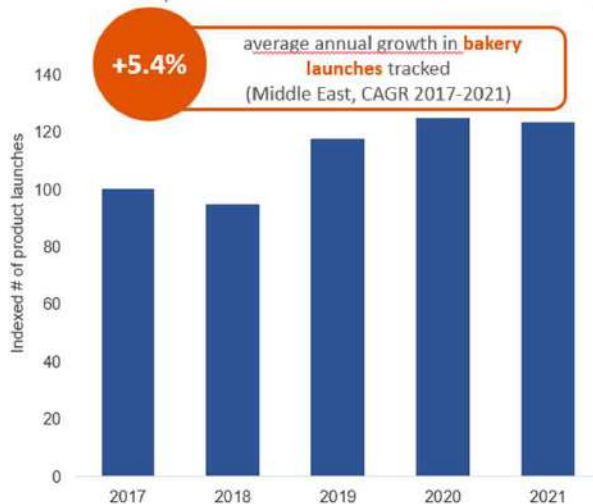
Health, taste, nutrition, convenience and online shopping are becoming the new drivers of the food industry in the UAE and the MENA region.

UAE presents great opportunities for the agri-food products from the EU. The foodservice market in the Emirates is expected to grow at a 5,22% CAGR between 2021 and 2026. This is caused by the lack of recreational alternatives in the country (leading to the population spending more time in foodservice outlets with friends and family), and other aforementioned factors such as high disposable income, rising tourism or the constant evolution of consumer trends.

In the last decades, the UAE went through a quick urbanization process in certain areas such as Dubai or Abu Dhabi. As a result, people's lifestyle in the Emirates has evolved as fast as the area, changing the food and beverage offer in the country completely.

Bakery launches have seen growth in ME market, inviting more innovations

Figure 1 | Index number of new bakery launches tracked (Middle East, Index: 2017 = 100)



Bob's Red Mill Buttermilk Pancake And Waffle Mix

Kuwait, Mar 2022

Claims: An employee owned company. Made with organic flour. Made from wholegrain. Certified kosher dairy. Certified organic by QAI.

Halwani Bros Maamoul Filled With Premium Saudi Dates

Saudi Arabia, Feb 2022

Claims: Limited edition. Green Dot Certified. Recyclable packaging. Premium.



Source: Innova Database

During the pandemic, **there was a push to buy private labels**, because they were the products least likely to run out of stock. Thus, private label is likely to gain traction during the forecast period due to its favourable prices and good quality. The current private label range is still limited in the UAE and is expected to expand. In addition, people with high purchasing power bought **premium products** such as premium water, high-quality meat cuts, chocolate and premium snacks.

Clean and ethical eating is a trend to follow in the Emirates, since the consumers are more aware of the environmental and health risks. This can **open new opportunities for products such as fruits, vegetables, or dried fruits from the EU, especially those from ecologic crops.**

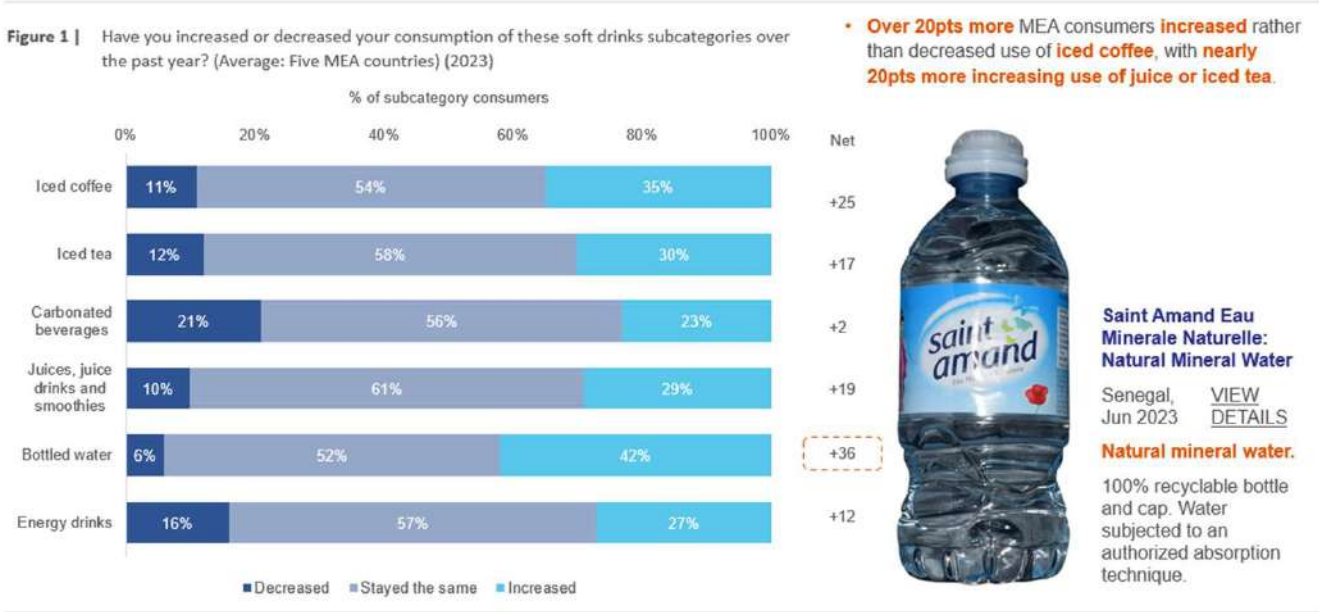
Sustainable products and packaging would also help to penetrate the Emirati market, those companies that have already implemented this kind of measures have bigger chances in the UAE than those that haven't.

The rising popularity of the products from local production might be a threat for some imported products, however, the country needs to import most of the total food and beverage products consumed by its citizens because the local production is very limited and does not cover the local demand.

According to Euromonitor forecasts, from 2018 to 2023, UAE sales of packaged food, fresh food and non-alcoholic beverages will grow at a CAGR of around 3.5%, 5.2% and 1.2%, respectively.

In **packaged foods**, retail sales value growth will be the highest in staples, followed by cooking ingredients, snacks and dairy products. In **fresh foods**, the strongest growth is expected in meat, pulses, nuts and vegetables. On the other hand, about the **non-alcoholic beverages** category, the strongest growth will be in ready-to-drink coffee, bottled water, concentrates, and tea.

Over 40% of MEA consumers increased bottled water use in the past year



Sources: Innova Database, Innova Category Survey 2023

Other products with a high sales potential in the UAE are:

| | | | |
|----------------|----------------------------------|---------------------|----------------------------|
| Dairy products | Innovative sauces and condiments | Prepared food | Fresh fruit |
| Poultry | Beef products | Tree nuts and seeds | Vegan products/plant based |

Emergent claims are high protein, immune health, probiotics and low sugar



Source: Innova Database

It is also important to **consider e-commerce and the opportunities** it can attract. The UAE has one of the highest online connectivity penetration rates in the world (99% of its population uses the internet and a significant majority have smartphones). This has driven the growth of online food and beverage retail in the UAE in recent years, which reached 116 million USD in 2019.

There are many e-commerce websites or mobile apps in the UAE that offer food delivery services or connect supermarkets with consumers. In addition, this market in the UAE is growing very fast and there are also some specialised e-commerce websites that focused, for example, on organic products, meat and seafood products.



Kashi Go Crush Peanut Butter Crunch Cereal
United Arab Emirates
Dec 2023

UAE consumers are diverse. Approximately 80% of residents are foreigners. Many of them are expatriate workers (coming from more than 200 different countries) and tourism has become an important economic activity. As a result, the hotel, restaurant and institutional (HRI) sector is particularly active.

Given the great diversity of the population and the level of income, which varies greatly between different groups, there is no 'general' consumer profile, but rather different profiles for different groups. Origin and income factors play a more important role than geography within the country, although restrictions in certain Emirates may lead to other nuances in consumer profiles and preferences.

This diversity is reflected in the variety of food available in the country and the demand. All those nationalities have different diets and preferences in products; therefore, it might be hard to determine a specific buyer for this product category in the UAE.



Almarai Vetel Fresh Yoghurt

United Arab Emirates

Dec 2023

Communication Claims .- Promises, education and training on animal welfare



“We have Zero Tolerance for **any act of animal cruelty**, and have established a protocol to deal with situations where a breach of the policy is suspected”



The following main consumer groups can be identified:

- **Emiratis:** This is 10% of the population and tends to be an affluent group (due to a combination of high wages and favourable economic policies for the native population). The vast majority of the Emirati workforce works in the public sector. For this group, luxury shopping is a trend, and their food preferences are influenced by tradition (they do not eat pork or drink alcohol). This demographic group is more balanced in terms of age and gender.
- **High-income expatriates:** This group tends to include Western expatriates with high incomes (8% of the population). With their high-income levels, these consumers tend to have luxury tastes and stimulate demand for different types of cuisine, including from their country of origin.
- **Low-income expatriates:** This group comprises about 50% of the UAE population. They are usually employed in manual or low-skilled jobs. These consumers tend to spend most of their income on food, accommodation (often shared) and other essentials, and send the rest of their income back to their home countries. The main characteristic of this group is that they are very price sensitive and do not tend to spend money on discretionary or luxury items. This demographic is expected to shrink in the coming years.

Price proposal and channel position, are critical to attract the consumer in the UAE market



Modern twists: Category innovation

MEZZAN HOLDING COLLABORATES WITH TABASCO® BRAND MAKER MCILHENNY CO.

•Available in three GCC markets – Kuwait, the UAE and Saudi Arabia

Foreign nationals are mainly responsible for the rapidly increasing population. However, almost all immigrants are young or middle-aged adults, and their presence ensures a relatively high median age.

In addition, it is important to mention other consumer groups:

- **Women:** They are a minority in the UAE, there are two men for every woman in the UAE. But for the native Emirati population, this figure is much closer to equality. As a group with more freedoms than their predecessors and who tend to be highly educated, young Emirati women are a potentially interesting demographic.
- **Elderly:** The over-65 age group, although growing, is a very small part (around 1%) of the overall UAE population. They are generally quite wealthy.

The standard of living in the UAE is one of the highest in the world and, in general, incomes are high.

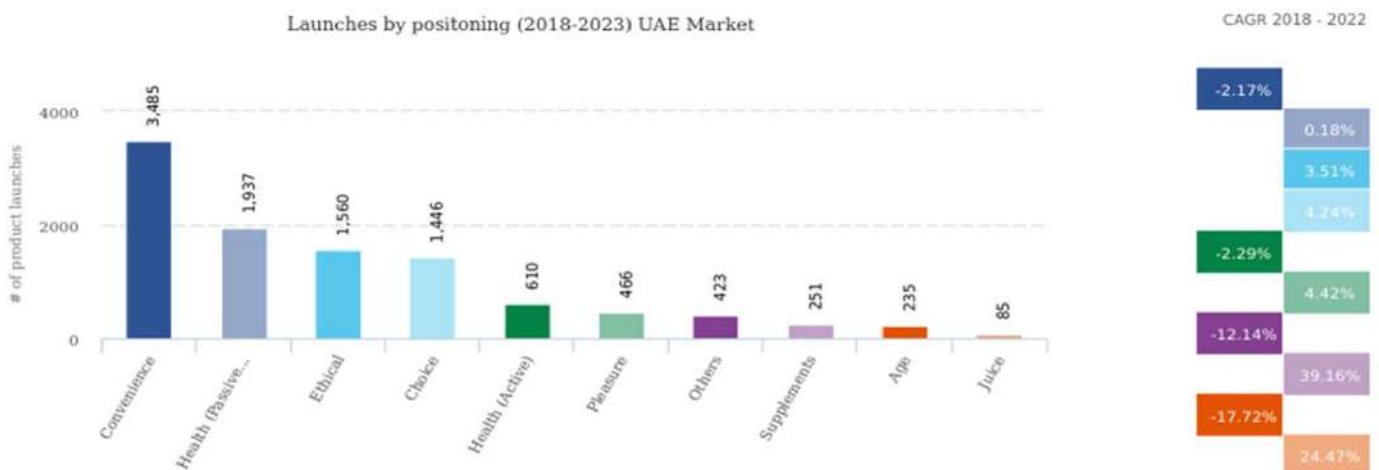
Food is at the centre of social relations in the UAE. It is considered an honour in the Arab culture having friends and family over for celebrations around tremendous quantities of food. The increasing urban lifestyle of the population is reflected in the raise of their spending in food and beverage outlets.



An important aspect to keep in mind in this market is the fact that **Muslims** (76% of the population of the country) **do not consume alcohol or pork**. Alcohol can only be served in hotels. Those bars and restaurants which are not associated with any hotel, cannot serve alcohol.

In the UAE grocery retailers are classified into two broad groups: the modern trade and the traditional trade.

- **The modern trade** includes organised retail chains, regional grocery shops, express markets, speciality shops, convenience stores and online retailers. This group dominates the market, especially in the emirates of Dubai and Abu Dhabi.
- **Traditional trade** includes direct trade services and small independent grocery shops (operating on average 18 hours a day, seven days a week, and focusing on immediate household needs and fast-moving grocery products). Traditional trade is more prevalent in the northern emirates due to the lower availability of modern outlets.



4 HEALTH FUNCTIONAL FOOD MARKET IN UAE

A shift in consumer trends has been observed in the UAE's health and wellness industry, with consumers aiming more towards preventative healthcare. Thus, nutritional supplements are positioning themselves as a natural and healthy substitute for traditional medicine in the country. The functional food sector was the leading category in the market during 2018.

Functional foods and beverages are those that not only cover basic nutrition, but also **contain added ingredients that affect human health in a positive way**. They are dietary supplements intended to provide nutrients that would otherwise not be consumed in sufficient quantities, such as proteins, vitamins, minerals, amino acids or other nutritional substances. The products are mainly taken in the form of tablets, capsules and liquid.

Consumers in the UAE have increasingly busy lifestyles. In the last few decades, reducing the intake of calories was the most popular trend, nowadays, they are trying to focus on nutrients and healthier eating habits.

Thus, the total functional packaged foods sales in the UAE grew at a 9,3% CAGR between 2016 and 2020. This impressive growth opens several opportunities for the EU companies.

The growth of the functional food market was fuelled by increasing health awareness, government initiatives and growth in disposable incomes, growth in the ageing population and health awareness of the age group (25-45 years). The market is expected to continue to grow during 2018-2023.

Food and beverages companies are willing to support this new trend, mainly for economic reasons. **Functional food is considered valued added products and are exempt from the price limits imposed to staple agri-food products in the UAE.** As a result, functional food products can be commercialized at a higher price increasing the profits.

The growing demand for value-added foods, especially functional health foods, opens up great potential for food manufacturers (especially for heart health) in the region. Companies are launching new omega-3 ingredients as well as products targeting the heart-healthy functional food market.

High consumption of dairy products, particularly dairy-based yoghurt, during the Ramazan season is one of the main growth drivers for these products. Functional dairy food sales are increasing as consumers become more aware of the digestive health benefits of the probiotics.

This segment was followed by the **functional beverages market**, whose most popular category is energy drinks (a product widely consumed by teenagers and young adults). However, the market weakened following the implementation of the 100% excise tax on energy drinks in 2017. In addition, in 2020, a new 50% excise tax was imposed on beverages containing sugar content and sweeteners.

Functional soft drinks are expected to remain the leading category in the functional beverage market in the coming years.

Vitamins and dietary supplements also have an important contribution, which have developed due to the increased participation of people in sport and physical activities, awareness of anti-ageing and detoxification issues.

There has also been an **increasing demand for functional baby food meals**. One of the prominent products in this category are milk formulas with added ingredients such as vitamins, minerals or omega 3, including ready-to-drink products or powdered versions.

Competition in the UAE functional food market was concentrated in 2018 with five major players capturing almost three quarters of the revenue. The market involves multinational giants and a few small domestic players. The major players in this UAE functional food market include Nestlé SA, Danone Group, Kellogg Company, Al Rawabi Dairy Company, and IFFCO Group, among others.

The market will observe the introduction of new products that include more natural content, such as natural sweeteners, fruit blends and many others. It is expected that vitamins will lead in vitamins and dietary supplements by 2023.

Lifestyle-specific personalized nutrition services are gaining traction Top 10 Trends 2021 Middle East Innova Market Insights

“How would you prefer to have your nutritional experience personalized?”

1. **Based on my nutritional needs**
2. **Based on my lifestyle**
3. **Based on my body composition**

5 BIO SOLUTIONS IN GCC AND UAE

Organic agriculture is a production system that supports healthy soils, ecosystems and people. It focuses on the use of agricultural techniques that promote sustainability by minimising negative environmental impacts.

In the absence of more specific data about the organic fertiliser market in the UAE, information on this sector is provided for all the GCC (Gulf Cooperation Councils), including the UAE.

GCC nations recognise the potential of organic agriculture and have taken steps to support a more environmentally friendly agricultural system. This is expected to boost demand for organic fertilisers.

The GCC organic fertiliser market is segmented by product group (organic residues and biofertilisers), application (in grains and cereals, pulses and oilseeds, fruits and vegetables, cash crops, and turf and ornamentals) and geography (in Saudi Arabia, Qatar, Oman, the United Arab Emirates, Bahrain and Kuwait).

The rising focus on organic farming practices and high availability of raw materials for fertilizer production are the two major factors that are driving the GCC organic fertilizer market. In addition, the state-run organic fertiliser development programmes implemented by governments and huge expansions of crop areas are also responsible for the growth of the market.

Thus, the GCC organic fertiliser market is forecast to register a CAGR of 13.5% between 2020 and 2025.

The GCC organic fertiliser market is concentrated in a few players, such as RNZ International FZCO, Abu Dhabi Fertilizer Industries Co. WLL and Emirates Bio-Fertilizers Factory.

The companies are collaborating with technology and other companies to ensure sustainable product innovation in the near future. Companies operating in this region are mainly focused on improving their production facilities and distribution network.

6 IMPORTING FOOD AND BEVERAGE TO UNITED ARAB EMIRATES

Importation of goods requires businesses to obtain necessary licenses from **customs** and concerned statutory authorities including federal agencies, municipalities, telecom regulatory authorities etc.

Importers which may be either brand representatives in the UAE of the manufacturing companies or distributors, need to be legal entity in UAE with Trade /Business license with the specific scope of activity permitted to apply for necessary clearances, compliances etc. with required documentation.

Authority Approvals and registrations

No product unless classified free trade may be imported into the country without prerequisite compliance with the set regulations with UAE authorities.

The UAE law establishes key requirements for an effective system to ensure the protection of public health and consumers. The law imposes strict penalties on those found to be endangering food safety across the UAE.

Municipalities & Federal authorities oversee food safety requirements and ensure that products have correct labels and expiry dates for consumption through their certification, border clearance mechanisms & market surveillance.

They conduct random inspections across all foodstuff stores and restaurants to ensure that the quality of the food supplied ***is in compliance with the regulatory requirements***.

MoIAT registration

MoIAT (Ministry of industry and Advanced Technology) is the sole National Certification MoIAT develops and adopts standards for regulating the compliance of various product scopes through its technical committees at the request of the government, industry, and consumers. MoIAT monitors the application of standards and technical regulations and mandates the below certification schemes for specific product scopes through approved notified bodies (such as SGS Gulf Ltd) for the complete certification scope.

A.- Emirates Quality Mark (EQM) is a Mark of Conformity granted to products that comply with the UAE national standards through evaluation of the product as well as testing, inspection & audit of the quality system used by the manufacturer.

EQM is a form of certification given to products that comply with the UAE national standards, regional and international standards, and are manufactured by an organization implementing a high-standard quality management system. When using a product with EQM, the consumer can rest assured that it's of a high quality and standard. The certification is important for businesses as it allows them to establish international standard guidelines for their products. It is important for consumers as they can be assured the product, they are buying enjoys international-quality standards.

Benefits of EQM

- License to use Emirates Quality Mark on products for 3 years
- Promoting brand name and reputation
- Attaining customer satisfaction and trust
- Facilitating entry of products through Custom ports

EQM is mandated for the below product categories

- Bottled Drinking Water
- Natural Mineral Water
- Juices and fruit necta
- Juices with milk

- Artificial flavored drinks
- Artificial flavored beverage powders
- Fruit drink
- Guava nectar
- Fresh fruit juice (non-pasteurized)
- Dairy & Milk Products
- Flavored milk
- Goat's milk
- Dairy & Dairy Products – pasteurized camel milk
- Yoghurt
- Flavored yogurt
- Laban Drink & Laban
- Flavored Laban

B.- Emirates Conformity Assessment Scheme (ECAS) this program determines whether imports meet national or international standards for products. Emirates Conformity Assessment Scheme (ECAS) certification program prescribes requirements for product quality and safety for a list of products designated for consumer use. The ECAS certificate is proof that the product has been approved by the UAE Federal Government through the Ministry of Industry and Advanced Technology (MOIAT). Emirates Conformity Assessment Scheme (ECAS) Certificate of all regulated products within UAE is valid for one year.

ECAS scheme is mandated for the below food product scopes

- Energy Drink
- Honey
- Tobacco Products

C.- Organic Certification all food products sold in UAE claiming to be organic needs to be certified under MoIAT & Dubai Municipality. The process involves testing of the products by accredited labs, to ensure they are free from pesticides, hormones and chemicals. These tests would apply to food produced in the UAE, as well as imported. For imported products, any certification issued in countries of origin may also be investigated or validated, as well as require local tests. Emirates Organic Foods Scheme cover organic foods and their inputs which are produced locally or imported products. It includes:

- Fresh /chilled /frozen fruit and vegetables.
- Canned food products.
- Fresh and canned juices.
- Meats and fish.
- Egg
- Milk, dairy, and cheese
- Honey

D.- Halal Certification & National Mark with the Muslim world showing rapid population growth, economic development, and increased disposable income, the global Halal market now accounts for nearly 16% of the entire global food industry.

In Muslim-majority countries, particularly in South Asia and the GCC – it is naturally assumed that all food is Halal by their large Muslim populations. However, increasingly, the discerning consumer is expecting proper certification, and hence halal certification is becoming important.

The Halal market is non-exclusive to Muslims and has gained increasing acceptance among non-Muslim consumers who associate Halal with ethical consumerism. As such, the values promoted by Halal – social responsibility, stewardship of the earth, economic and social justice, animal welfare and ethical investment - have gathered interest beyond its religious compliance. The popularity of, and demand for, Halal certified products among non-Muslim consumers have been on the rise as more

Municipality Registrations

A.- Product registration with ZAD

ZAD is the federal portal for food trade in UAE. This service allows all food suppliers, traders and food establishments who intend to import or manufacture food products in the Emirate of UAE to obtain a request for food item registration, so they may import or (re-)export using this system. These services help to achieve the goal of importing products to the country through its ports.

AN INTERGRATION OF MUNICIPALITIES IN THE UAE

ZAD registration integrates the Ministry of Climate Change & Environment with Municipalities of all the seven emirates of the UAE and allows for single window application and compliance assurance for importation and sales of the products in the UAE.

REGISTRATION PROVISIONS

Food whether imported or locally produced must be registered in the electronic system (ZAD) before being handled in the markets of UAE. All food establishments licensed in the country shall ensure the registration of their food items in particular the following cases:

- Food to be imported to the country.
- Food manufactured or produced in the country.
- Food that undergoes modification on its food label or its ingredients or composition.
- Registration of food product is considered a requirement and not accreditation.

B.- Dubai Municipality

The Dubai Municipality Food Control department requires all food importing companies to conform to the following:

- Register the company in the Dubai Municipality Food Import and Re-export System (FIRS) to be able to apply for food import requests and to be able to follow up the status of importation from inspection to release.
- Acquire food label approval for all items to be imported to confirm if it is in compliance to standard, thereby avoiding rejection when actual consignment comes.
- Register all food items in the Dubai Municipality Food Import and Re-export System (FIRS) before importing.
- It is advisable to obtain a FIT analysis result of the food items to be imported from Dubai Central Food Laboratory or from international accredited laboratories located across the world by specifying the item's fitness for human consumption. If analysis result is not available prior to arrival of the consignment, samples will be collected, and your shipment will be put on hold until laboratory result comes.

DIETARY SUPPLEMENTS (Dubai Municipality- montaji scheme)

Montaji Scheme is a separate government body that falls under Dubai Municipality. Importation of Dietary & Health products requires businesses to obtain necessary licenses from customs and concerned statutory authorities like municipalities. The importer needs to be legal entity in UAE with Trade /Business license with the specific scope of activity permitted are required to apply for necessary clearances, compliances etc. with necessary documentation. Importer may be the brand representative of the manufacturing companies or distributors in UAE.

Dietary supplements must ensure registration under Dubai Municipality (Montaji) before entering UAE market.

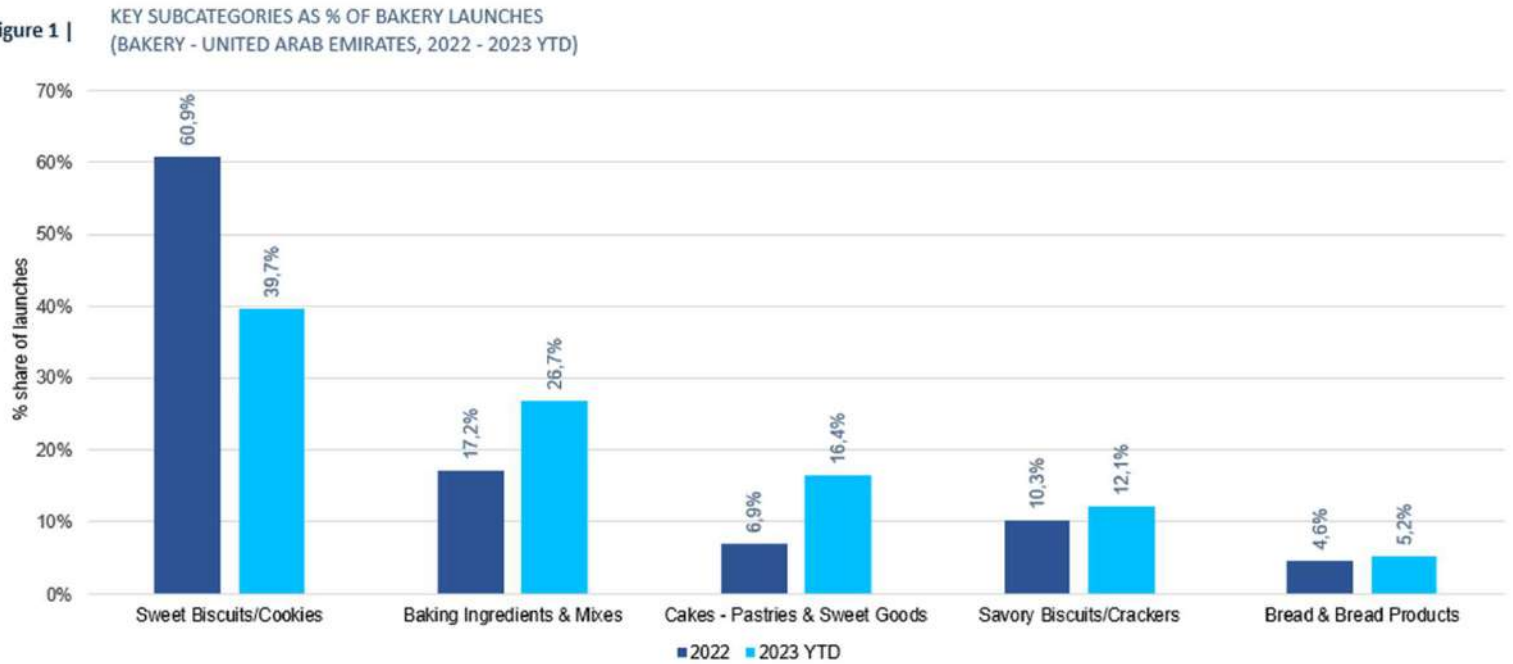
This service enables the customer to obtain approval from Dubai Municipality (Montaji), for the items he intends to import or manufacture dietary supplements in Dubai.





Chart Section

Bakery – United Arab Emirates

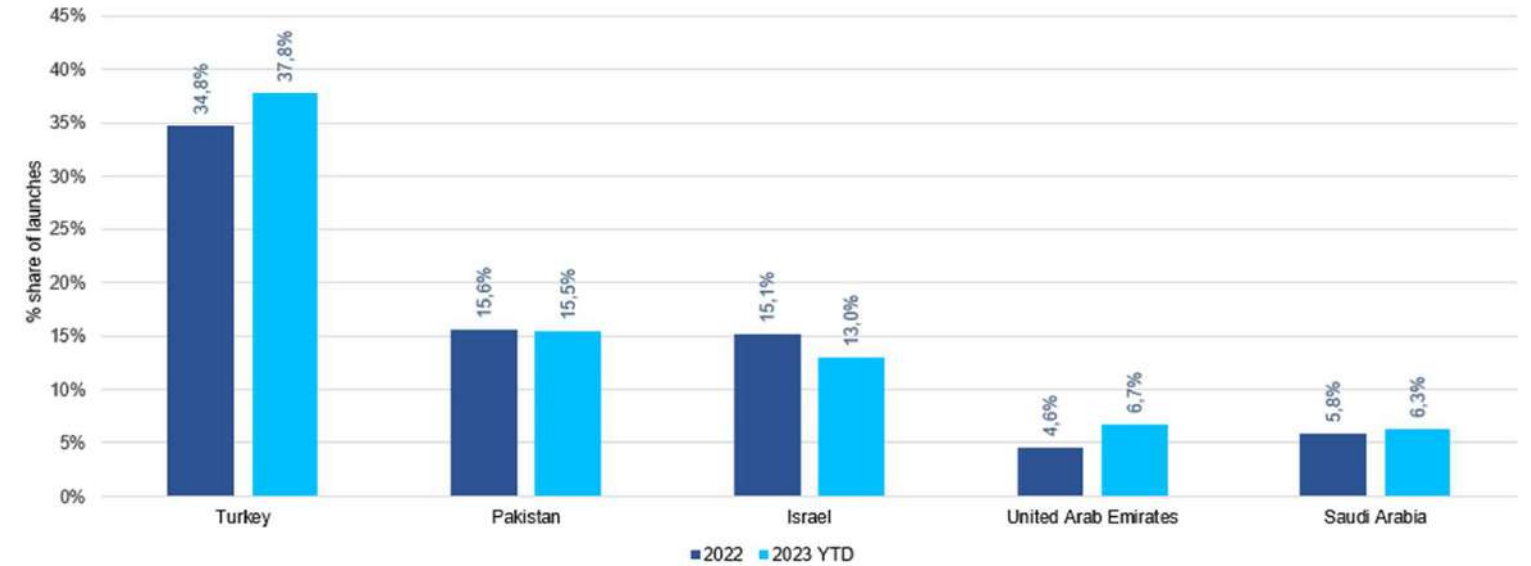


Source: Innova | Category | Genius F&B

Chart Section

Bakery – United Arab Emirates

Figure 2 | KEY COUNTRIES
(BAKERY, 2022 - 2023 YTD)



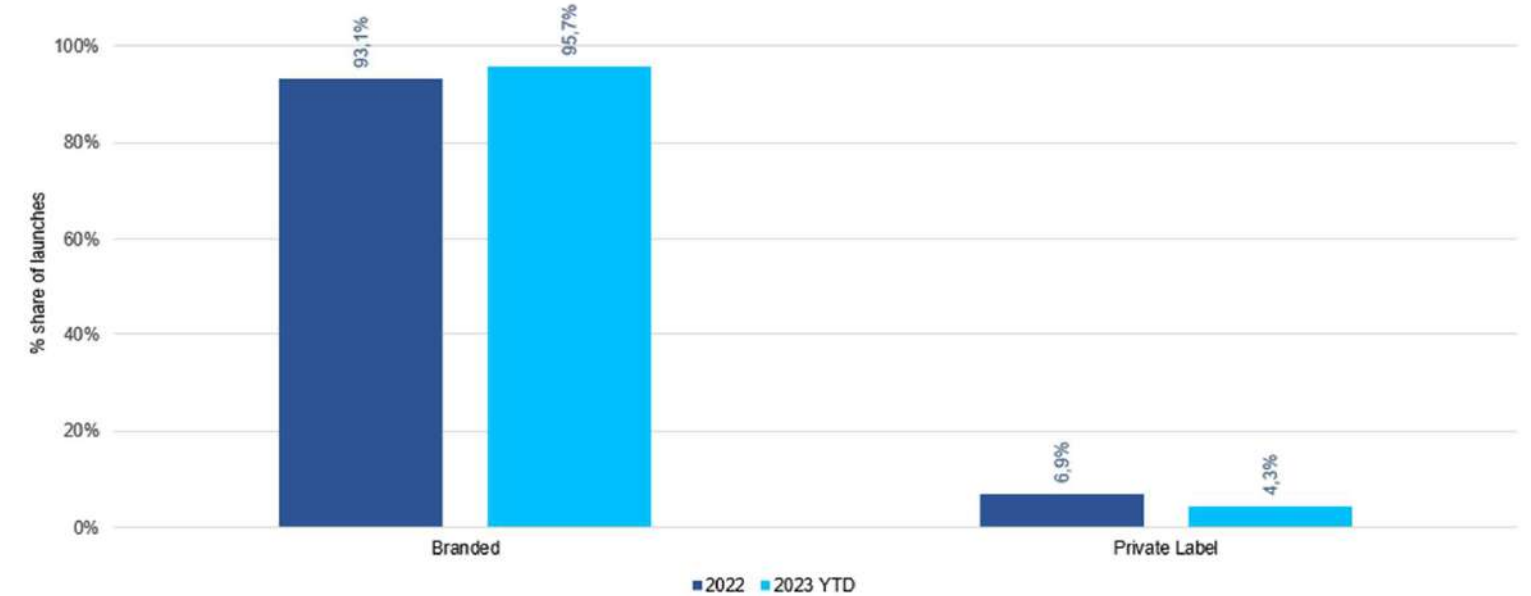
Source: Innova | Category | Genius F&B

12 ● INNOVA MARKET INSIGHTS

Chart Section

Bakery – United Arab Emirates

Figure 3 | BRANDS VS PRIVATE LABEL
(BAKERY - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



Source: Innova | Category | Genius F&B

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Chart Section

Bakery – United Arab Emirates

Figure 4 | KEY ACTIVE LAUNCHERS - COMPANIES
(BAKERY - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

| 2022 | 2023 YTD |
|------------------------|-----------------------------|
| Loacker (13.8%) | General Mills (8.6%) |
| United Biscuits (6.9%) | Iffco (6.9%) |
| Mondelez (5.8%) | Britannia Industries (6.0%) |
| Carrefour (4.6%) | Al Ghurair Foods (4.3%) |
| Americana Foods (3.5%) | Western Bakery (4.3%) |

Source: Innova | Category | Genius F&B

Chart Section

Bakery – United Arab Emirates

Figure 5 | KEY ACTIVE LAUNCHERS - BRANDS
(BAKERY - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

| 2022 | 2023 YTD |
|--------------------------|----------------------|
| Quadratini (9.2%) | Betty Crocker (6.9%) |
| Loacker (4.6%) | Britannia (6.0%) |
| Mcvities (4.6%) | Tiffany (6.0%) |
| Americana Quality (3.5%) | Jenan (4.3%) |
| Britannia (3.5%) | Lusine (4.3%) |

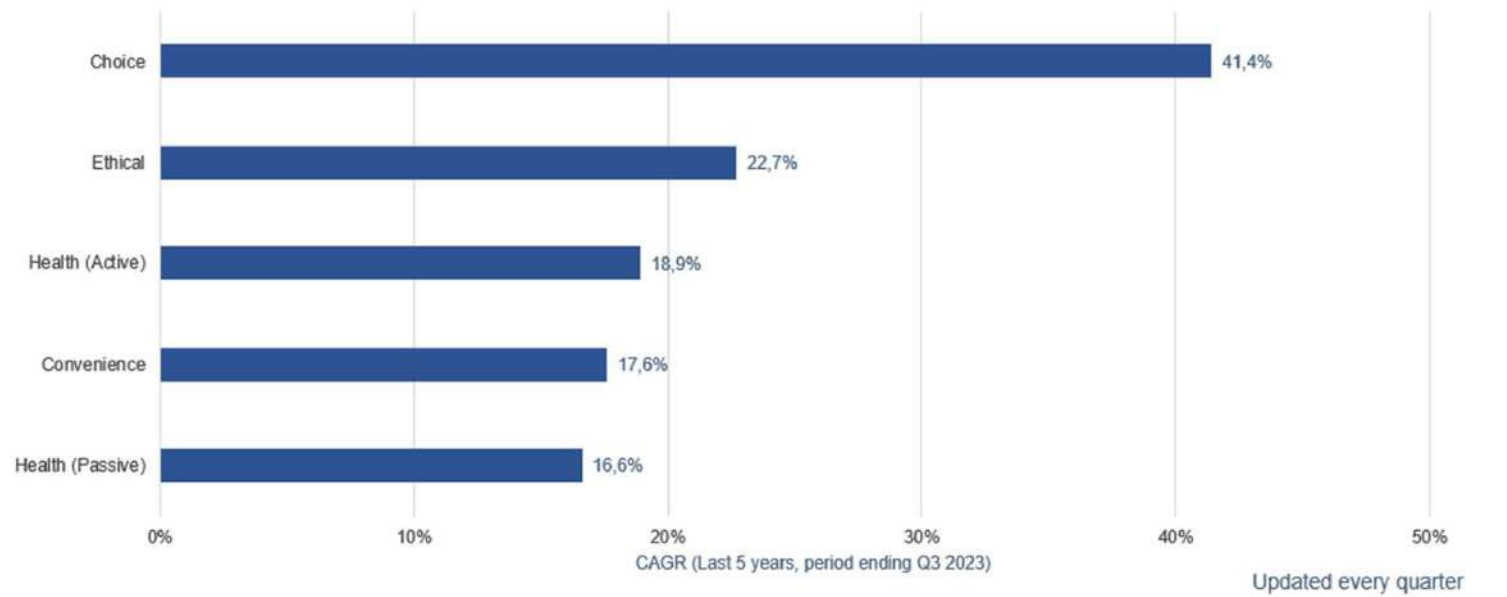
Source: Innova | Category | Genius F&B



Chart Section

Bakery – United Arab Emirates

Figure 6 | FASTEST GROWING POSITIONING CATEGORIES
(BAKERY - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)

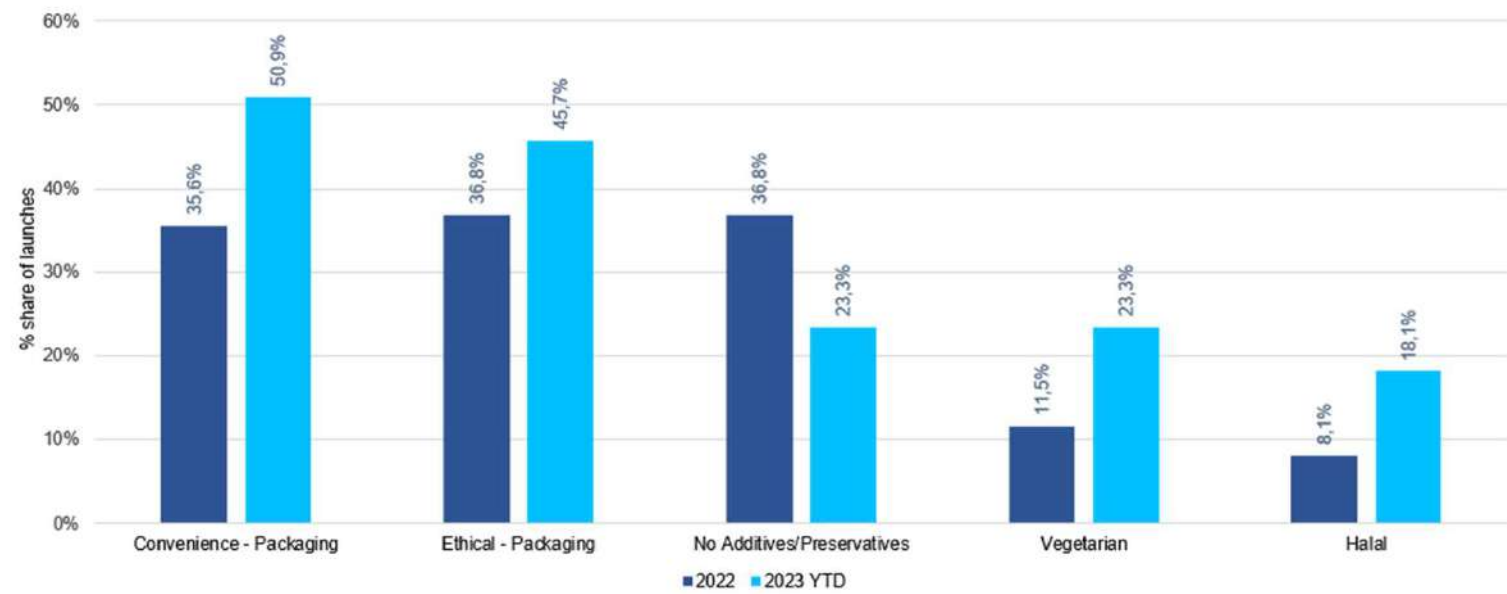


Source: Innova | Category | Genius F&B 16 INNOVA MARKET INSIGHTS

Chart Section

Bakery – United Arab Emirates

Figure 7 | KEY POSITIONINGS
(BAKERY - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

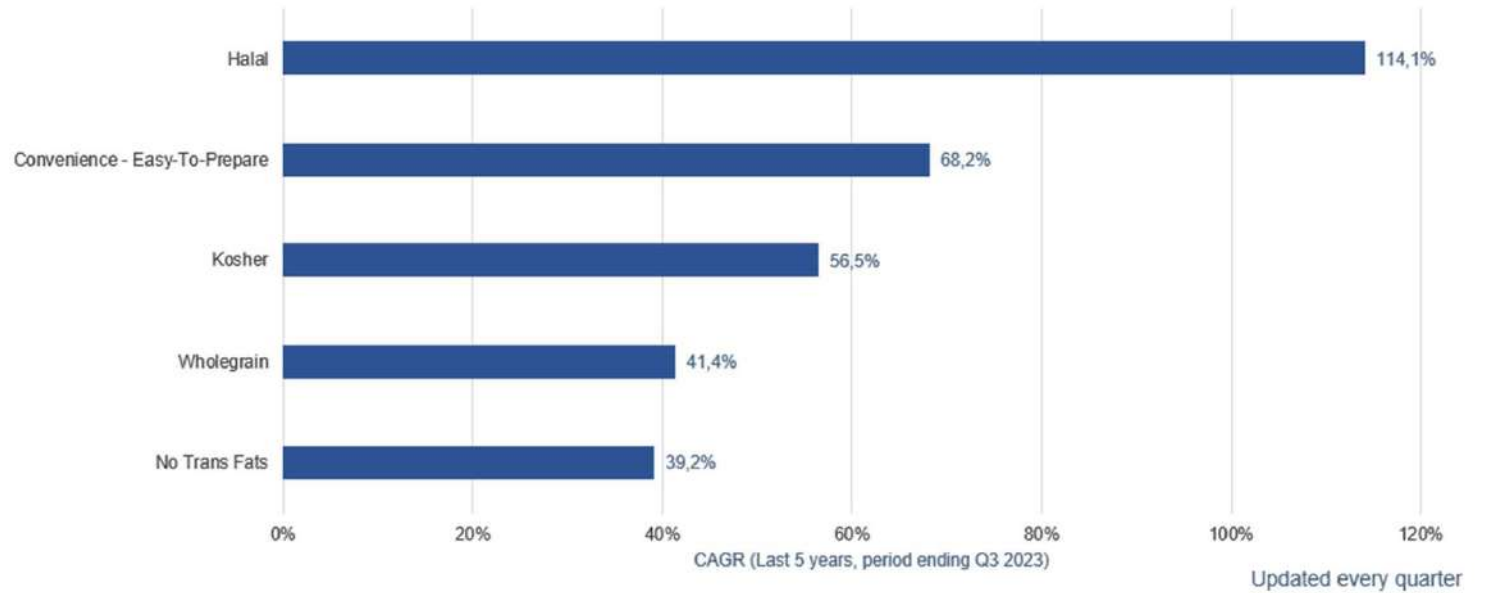


Source: Innova | Category | Genius F&B 17 INNOVA MARKET INSIGHTS

Chart Section

Bakery – United Arab Emirates

Figure 8 | FASTEST GROWING POSITIONINGS
(BAKERY - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



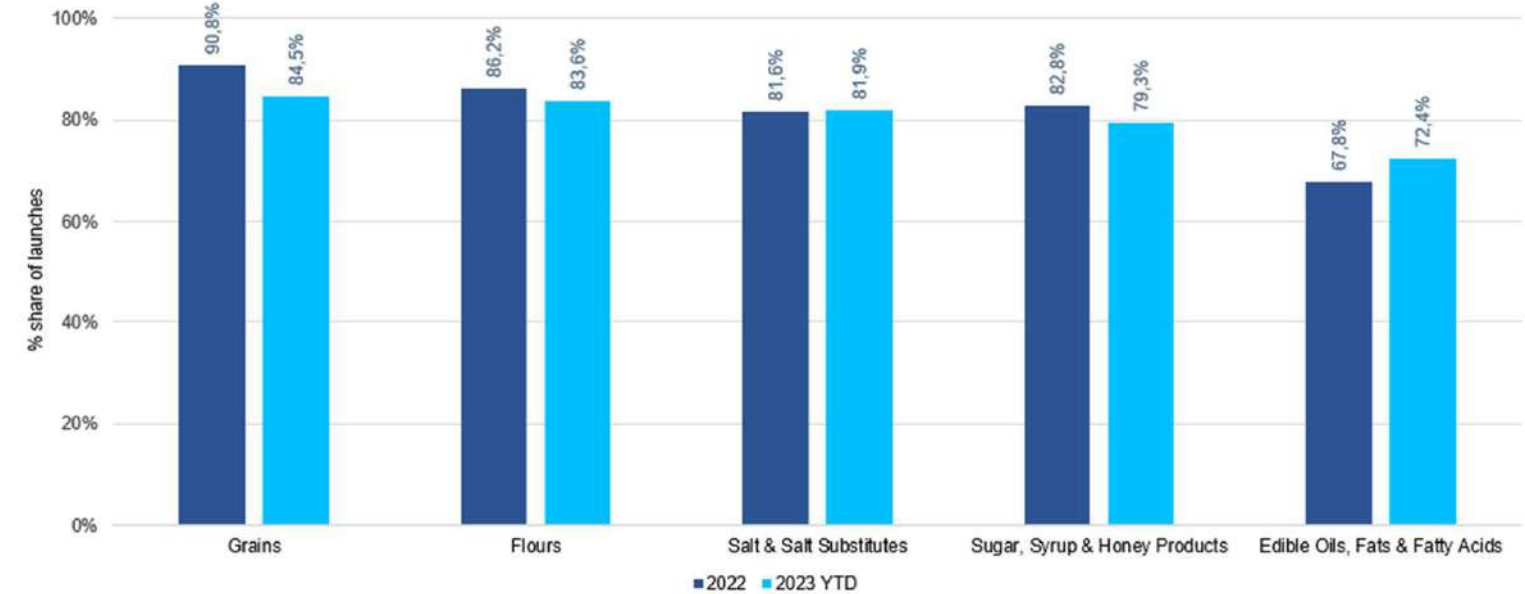
Source: Innova | Category | Genius F&B

18 ● INNOVA MARKET INSIGHTS

Chart Section

Bakery – United Arab Emirates

Figure 9 | KEY INGREDIENT GROUPS
(BAKERY - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



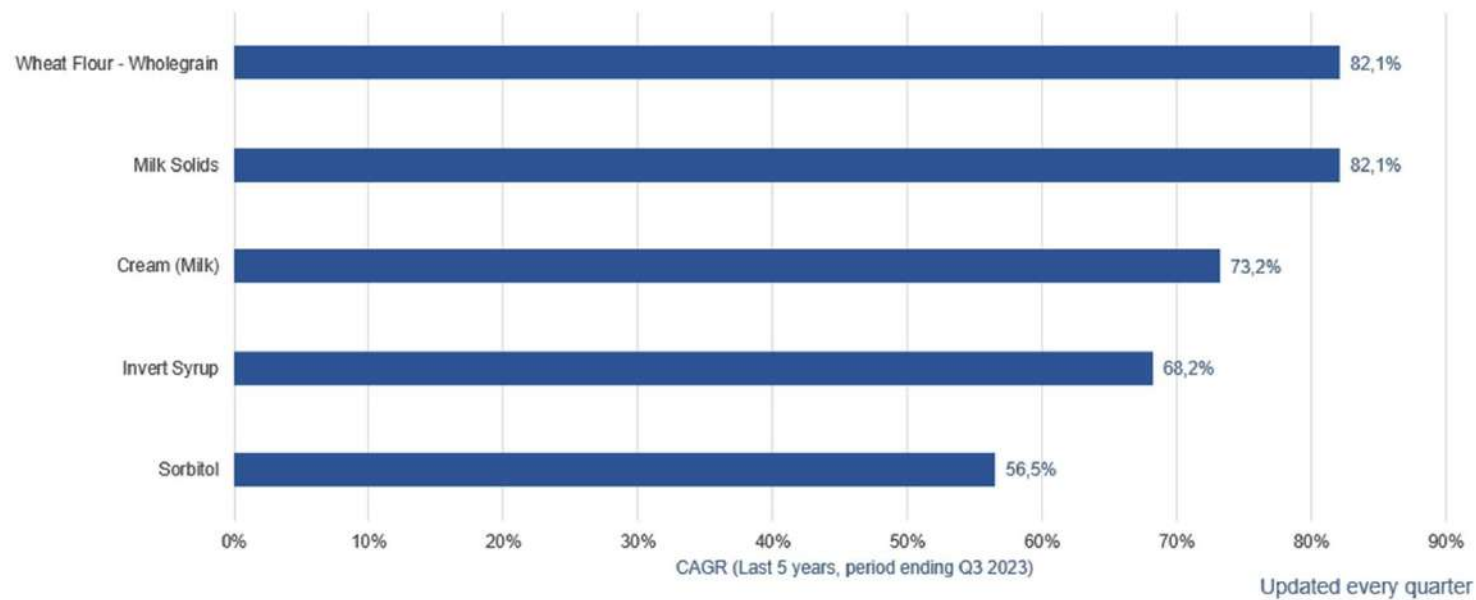
Source: Innova | Category | Genius F&B

19 ● INNOVA MARKET INSIGHTS

Chart Section

Bakery – United Arab Emirates

Figure 10 | FASTEST GROWING INGREDIENTS
(BAKERY - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



Source: Innova | Category | Genius F&B

20 ● INNOVA MARKET INSIGHTS



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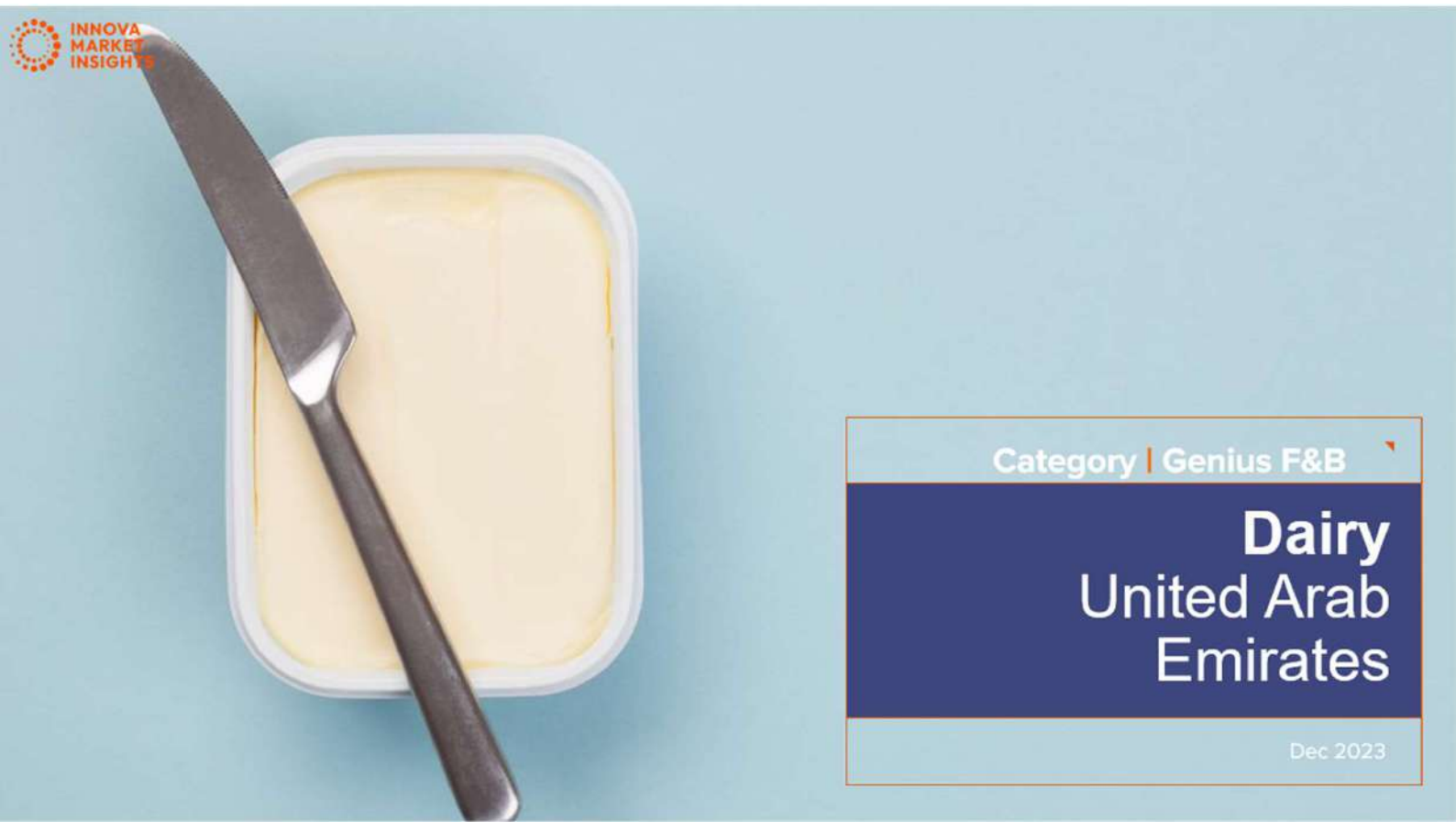
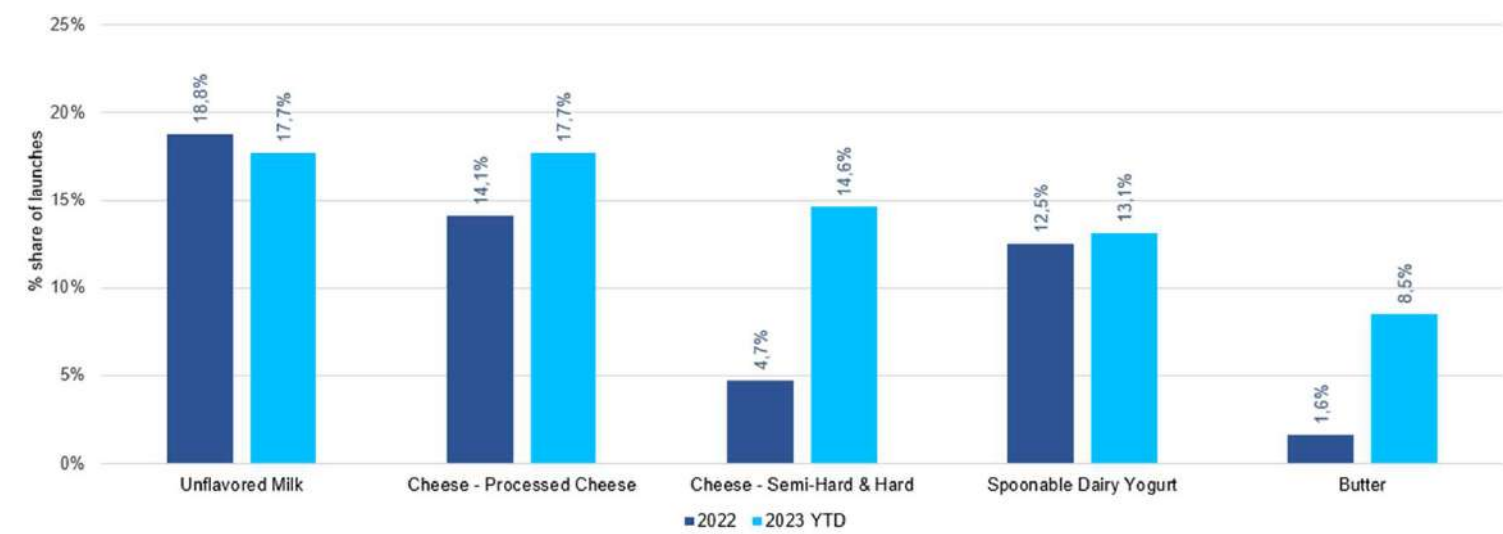


Chart Section

Dairy – United Arab Emirates

Figure 1 | KEY SUBCATEGORIES AS % OF DAIRY LAUNCHES (DAIRY - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

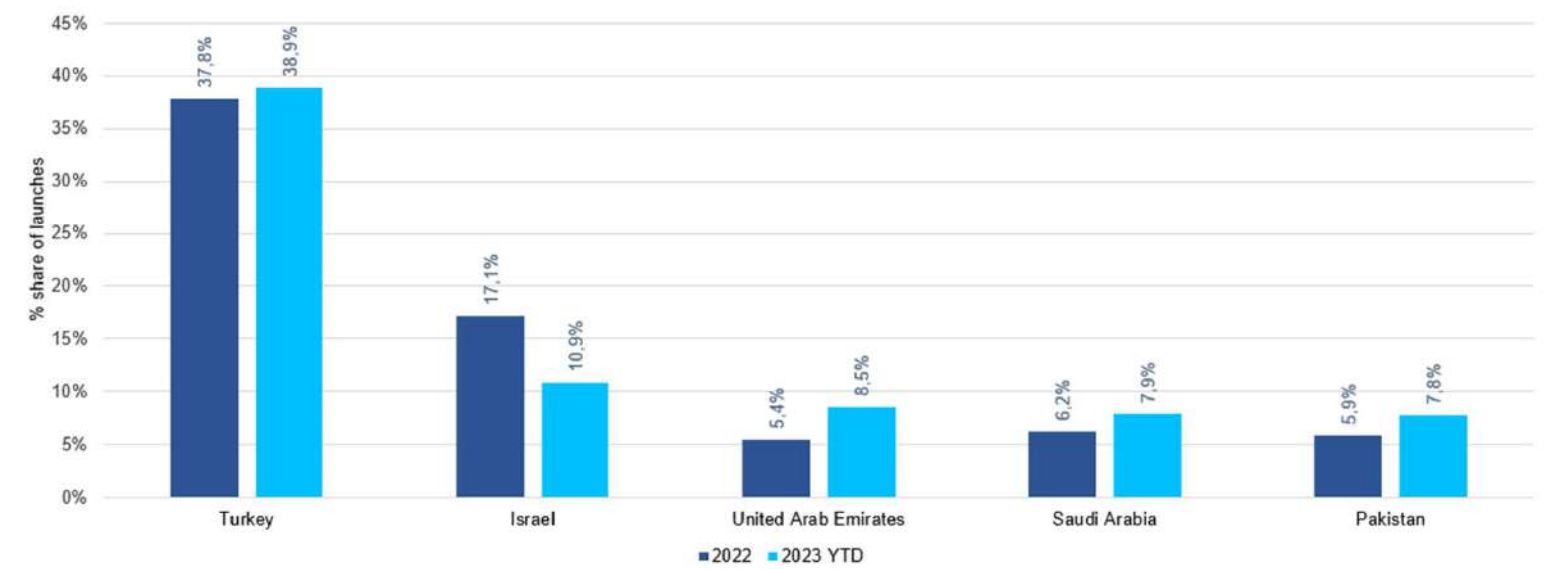


Source: Innova | Category | Genius F&B

Chart Section

Dairy – United Arab Emirates

Figure 2 | KEY COUNTRIES (DAIRY, 2022 - 2023 YTD)



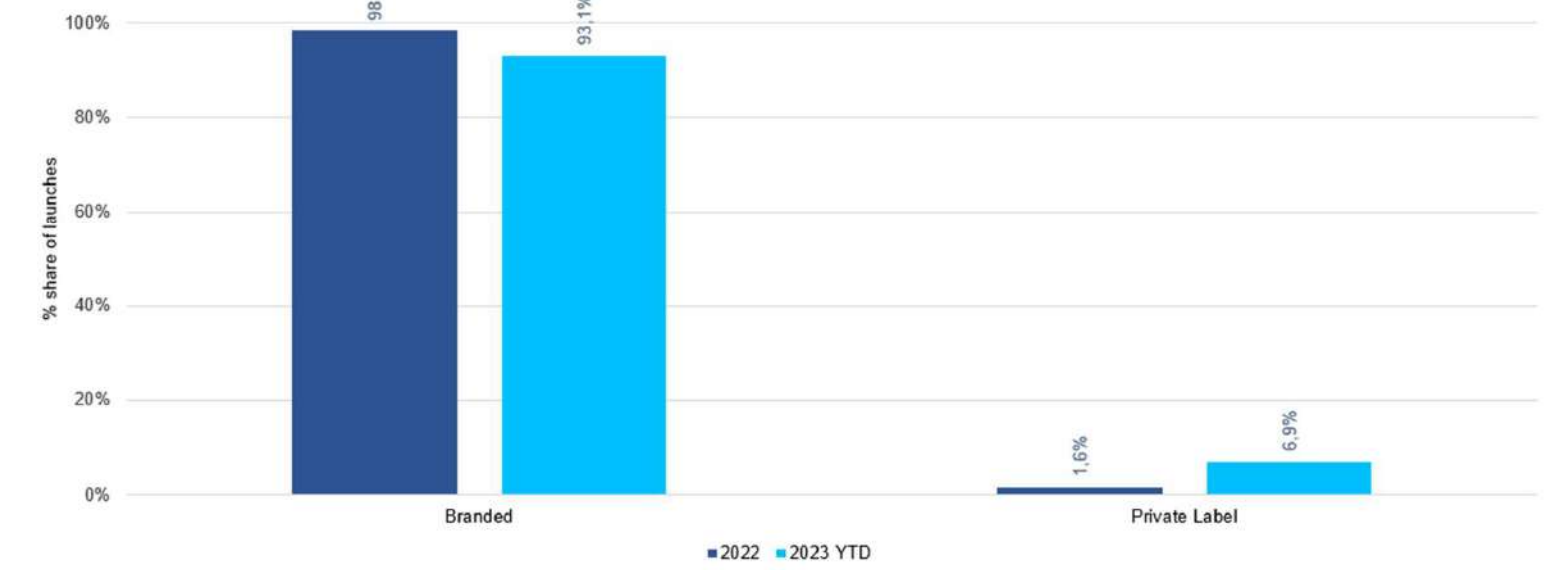
Source: Innova | Category | Genius F&B

10 INNOVA MARKET INSIGHTS

Chart Section

Dairy – United Arab Emirates

Figure 3 | BRANDS VS PRIVATE LABEL (DAIRY - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



Source: Innova | Category | Genius F&B

11 INNOVA MARKET INSIGHTS



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Chart Section

Dairy – United Arab Emirates

Figure 4 | KEY ACTIVE LAUNCHERS - COMPANIES
(DAIRY - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

| 2022 | 2023 YTD |
|-------------------------|-----------------------|
| Almarai (10.9%) | Almarai (12.3%) |
| Alpro (9.4%) | Arla (7.7%) |
| Nadec (9.4%) | Lactalis (6.2%) |
| Arla (7.8%) | National Dairy (5.4%) |
| Frieslandcampina (7.8%) | Agthia Group (3.9%) |

Source: Innova | Category | Genius F&B

Chart Section

Dairy – United Arab Emirates

Figure 5 | KEY ACTIVE LAUNCHERS - BRANDS
(DAIRY - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

| 2022 | 2023 YTD |
|-----------------|------------------|
| Almarai (10.9%) | Almarai (12.3%) |
| Alpro (9.4%) | Hayatna (5.4%) |
| Nadec (9.4%) | President (4.6%) |
| Rainbow (7.8%) | Al Ain (3.9%) |
| Nada (6.3%) | Kiri (3.9%) |

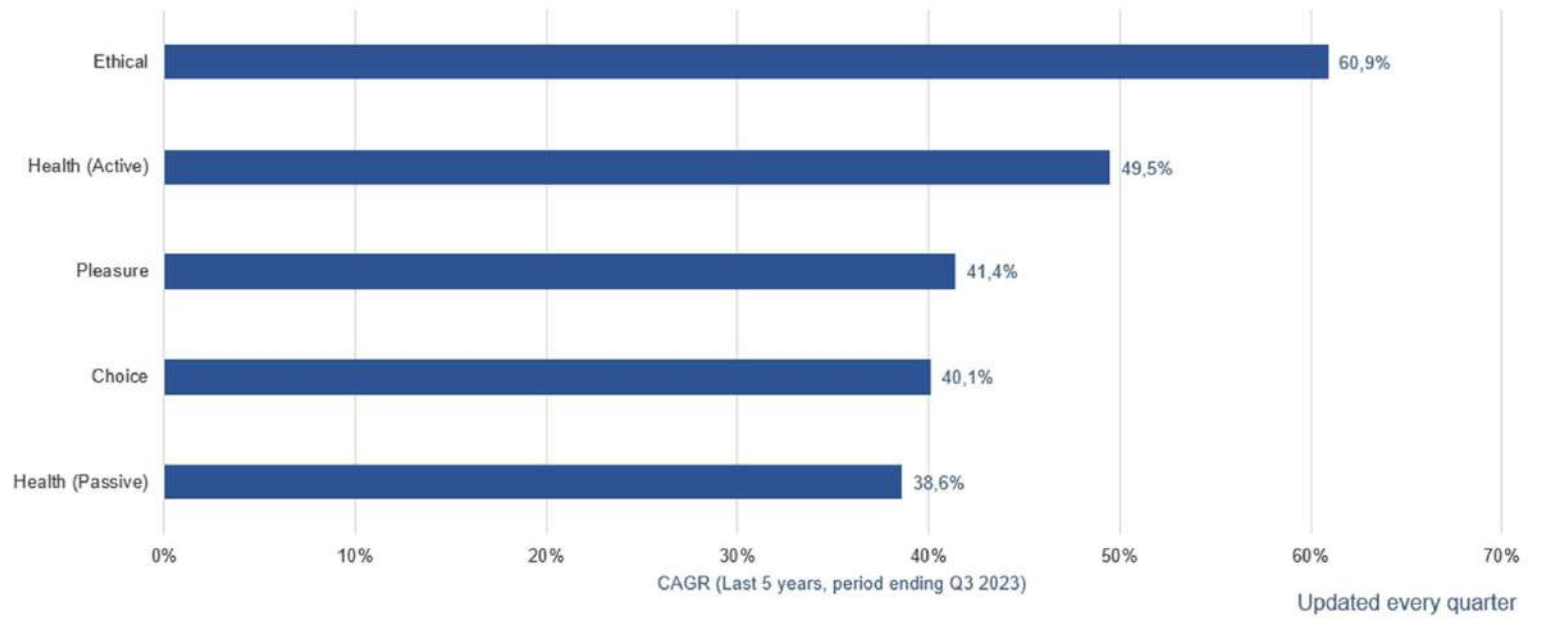
Source: Innova | Category | Genius F&B



Chart Section

Dairy – United Arab Emirates

Figure 6 | FASTEST GROWING POSITIONING CATEGORIES
(DAIRY - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



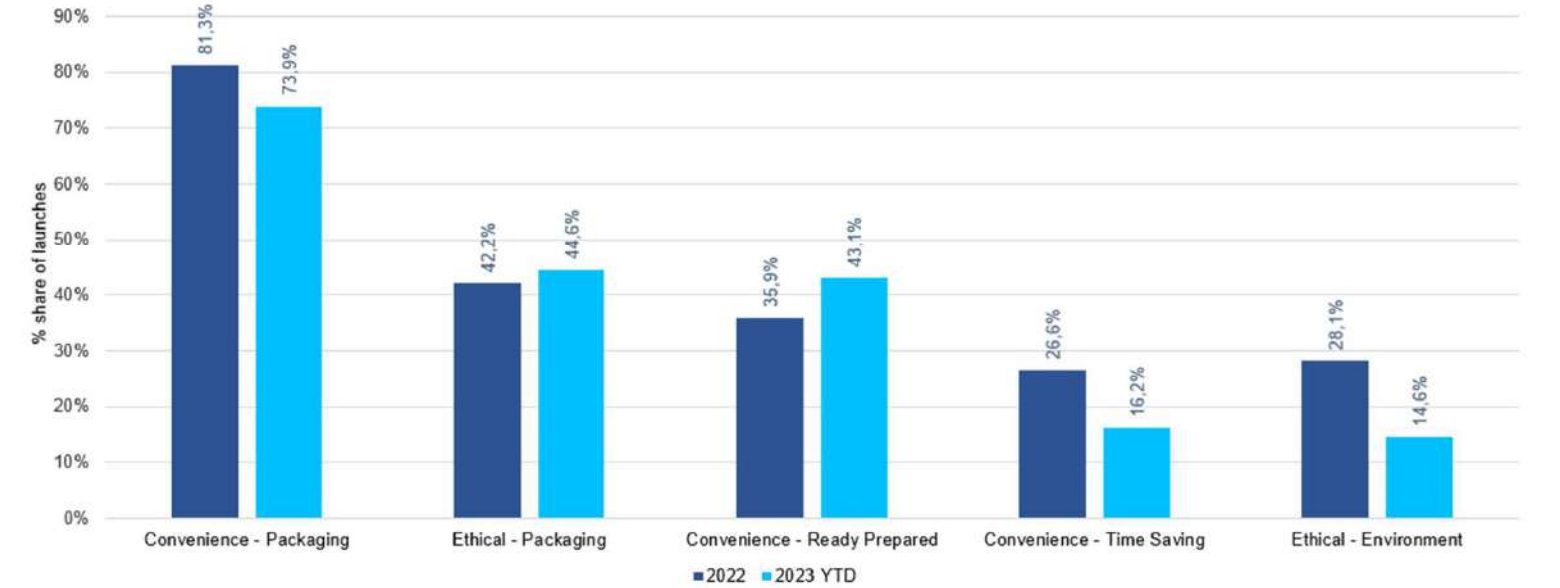
Source: Innova | Category | Genius F&B

14 ● INNOVA MARKET INSIGHTS

Chart Section

Dairy – United Arab Emirates

Figure 7 | KEY POSITIONINGS
(DAIRY - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



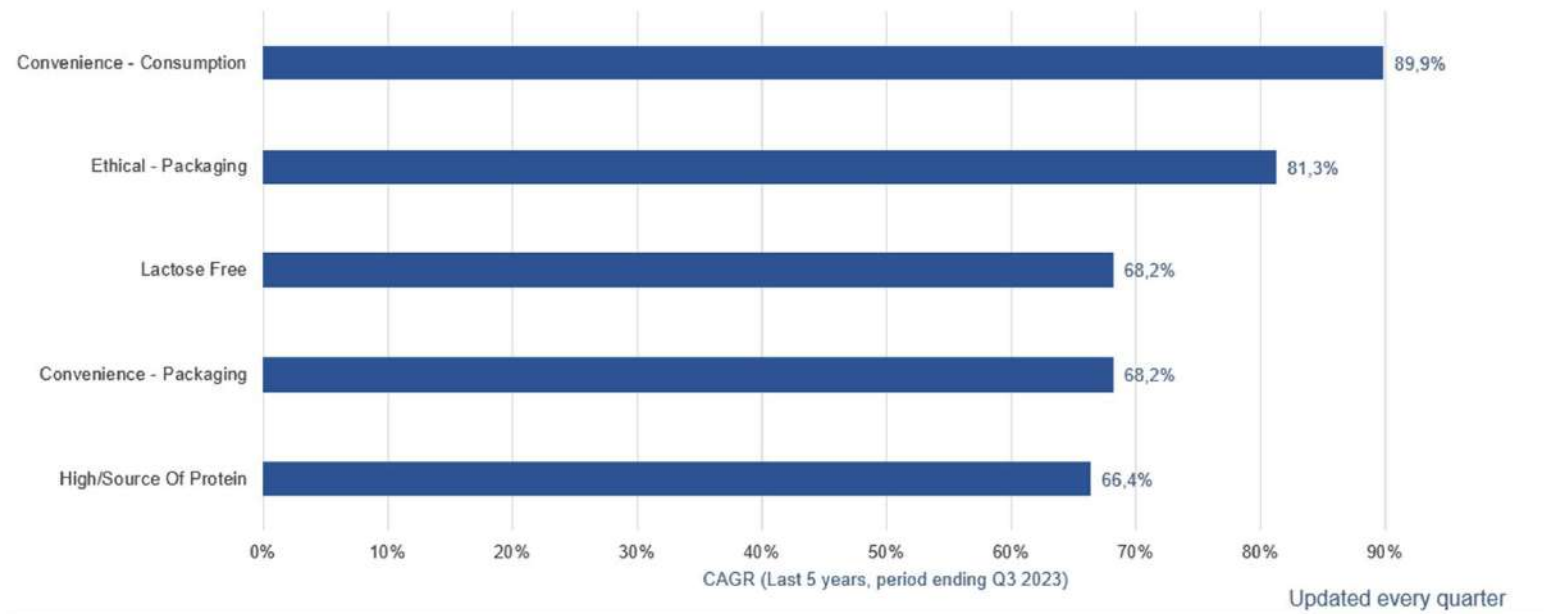
Source: Innova | Category | Genius F&B

15 ● INNOVA MARKET INSIGHTS

Chart Section

Dairy – United Arab Emirates

Figure 8 | FASTEST GROWING POSITIONINGS
(DAIRY - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



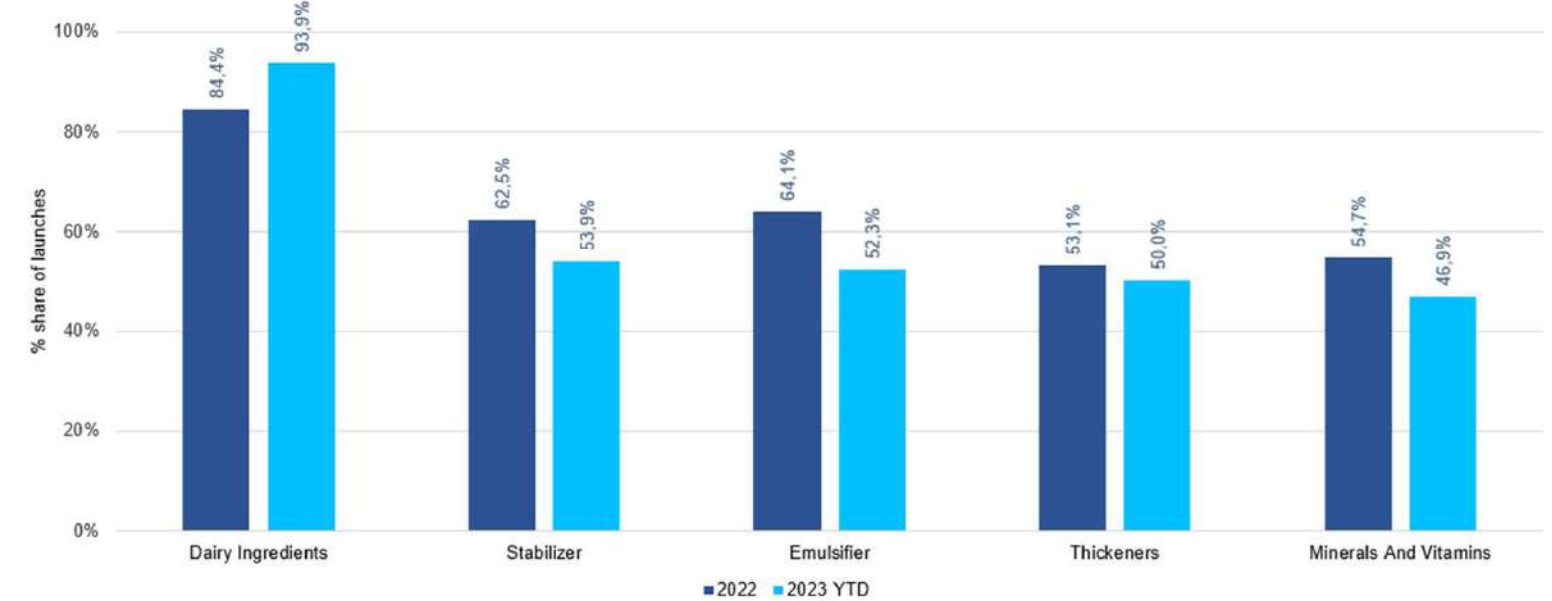
Source: Innova | Category | Genius F&B

16 ● INNOVA MARKET INSIGHTS

Chart Section

Dairy – United Arab Emirates

Figure 9 | KEY INGREDIENT GROUPS
(DAIRY - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



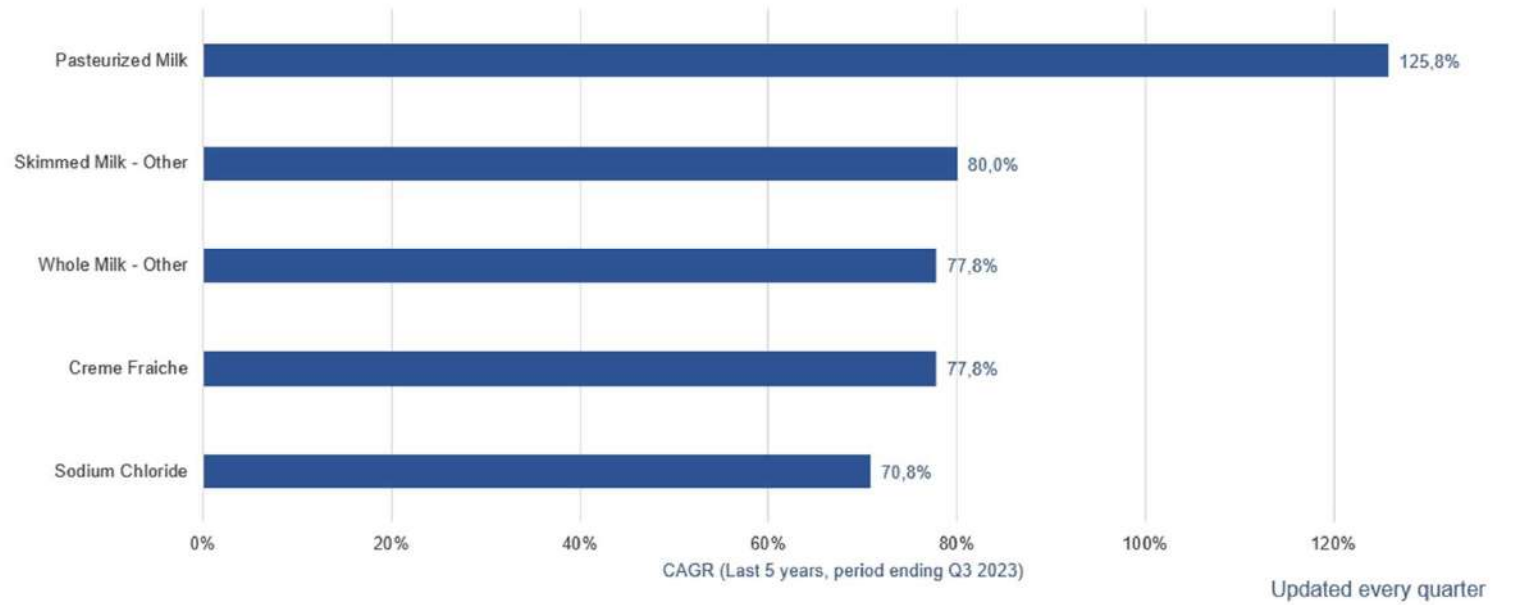
Source: Innova | Category | Genius F&B

17 ● INNOVA MARKET INSIGHTS

Chart Section

Dairy – United Arab Emirates

Figure 10 | FASTEST GROWING INGREDIENTS
(DAIRY - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



Source: Innova | Category | Genius F&B

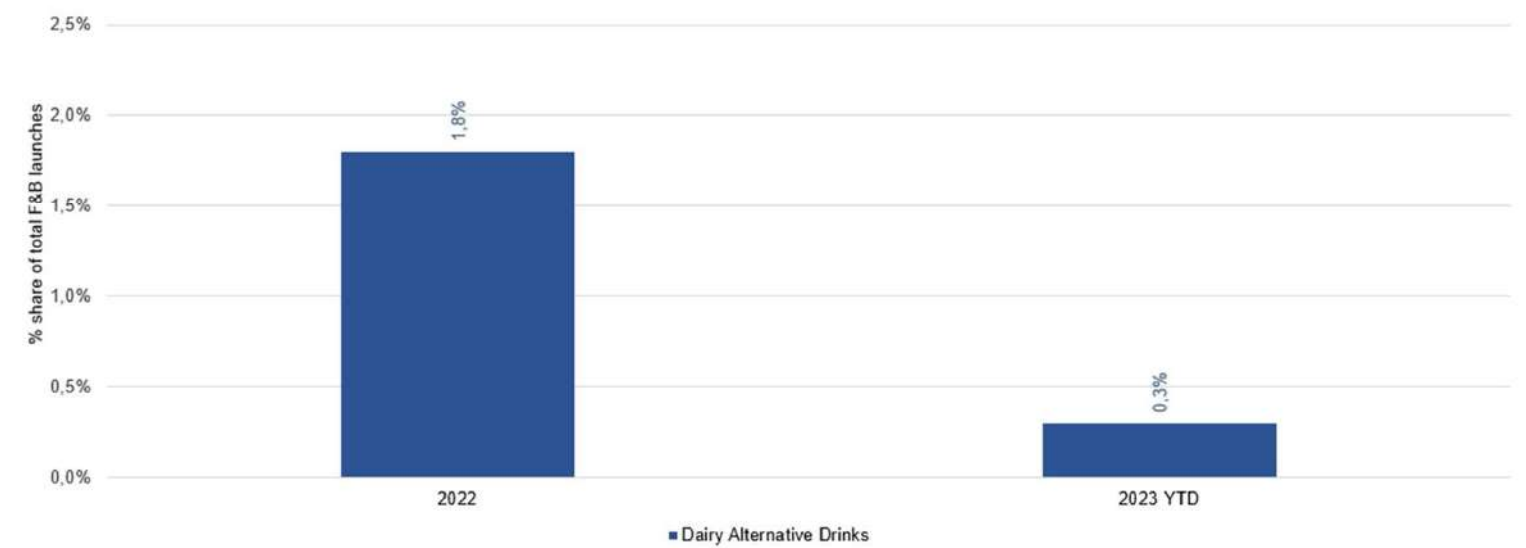
18 ● INNOVA MARKET INSIGHTS



Chart Section

Dairy Alternative Drinks – United Arab Emirates

Figure 1 | DAIRY ALTERNATIVE DRINKS LAUNCHES AS % OF FOOD & BEVERAGE LAUNCHES (DAIRY ALTERNATIVE DRINKS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



Source: Innova | Category | Genius F&B

10 ● INNOVA MARKET INSIGHTS



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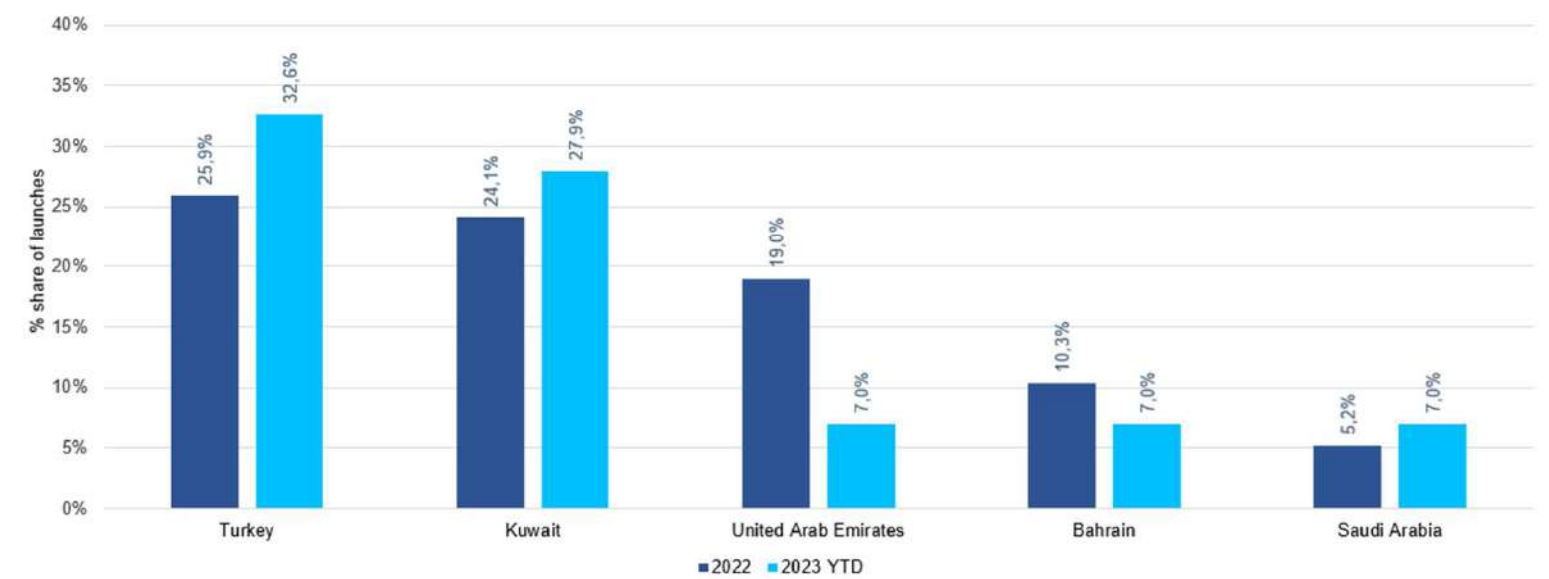
INTERNATIONAL



Chart Section

Dairy Alternative Drinks – United Arab Emirates

Figure 2 | KEY COUNTRIES
(DAIRY ALTERNATIVE DRINKS, 2022 - 2023 YTD)



Source: Innova | Category | Genius F&B

11 ● INNOVA MARKET INSIGHTS

Chart Section

Dairy Alternative Drinks – United Arab Emirates

Figure 3 | KEY ACTIVE LAUNCHERS - COMPANIES
(DAIRY ALTERNATIVE DRINKS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

| 2022 | 2023 YTD |
|----------------------------|---|
| Alpro (54.6%) | Alpro (33.3%) |
| Green Spot Company (18.2%) | Green Spot Company (33.3%) |
| Ace Canning (9.1%) | Sanitarium Health And Wellbeing (33.3%) |
| Eastern Condiments (9.1%) | |
| Koita (9.1%) | |

Source: Innova | Category | Genius F&B

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INTERNATIONAL



Chart Section

Dairy Alternative Drinks – United Arab Emirates

Figure 4 | KEY ACTIVE LAUNCHERS - BRANDS
(DAIRY ALTERNATIVE DRINKS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

| 2022 | 2023 YTD |
|------------------|--------------------|
| Alpro (54.6%) | Alpro (33.3%) |
| Vitamilk (18.2%) | Sanitarium (33.3%) |
| Drinho (9.1%) | V Soy (33.3%) |
| Eastern (9.1%) | |
| Koita (9.1%) | |

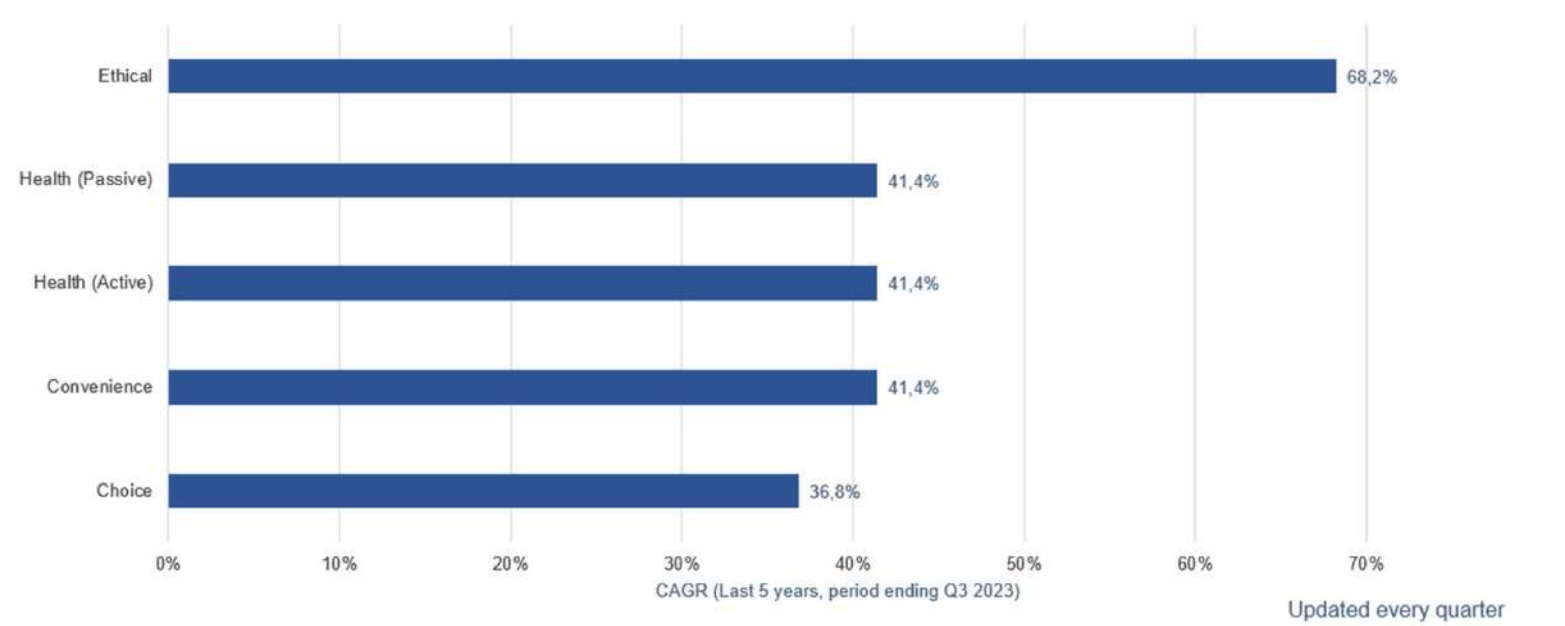
Source: Innova | Category | Genius F&B

13 ● INNOVA MARKET INSIGHTS

Chart Section

Dairy Alternative Drinks – United Arab Emirates

Figure 5 | FASTEST GROWING POSITIONING CATEGORIES
(DAIRY ALTERNATIVE DRINKS - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



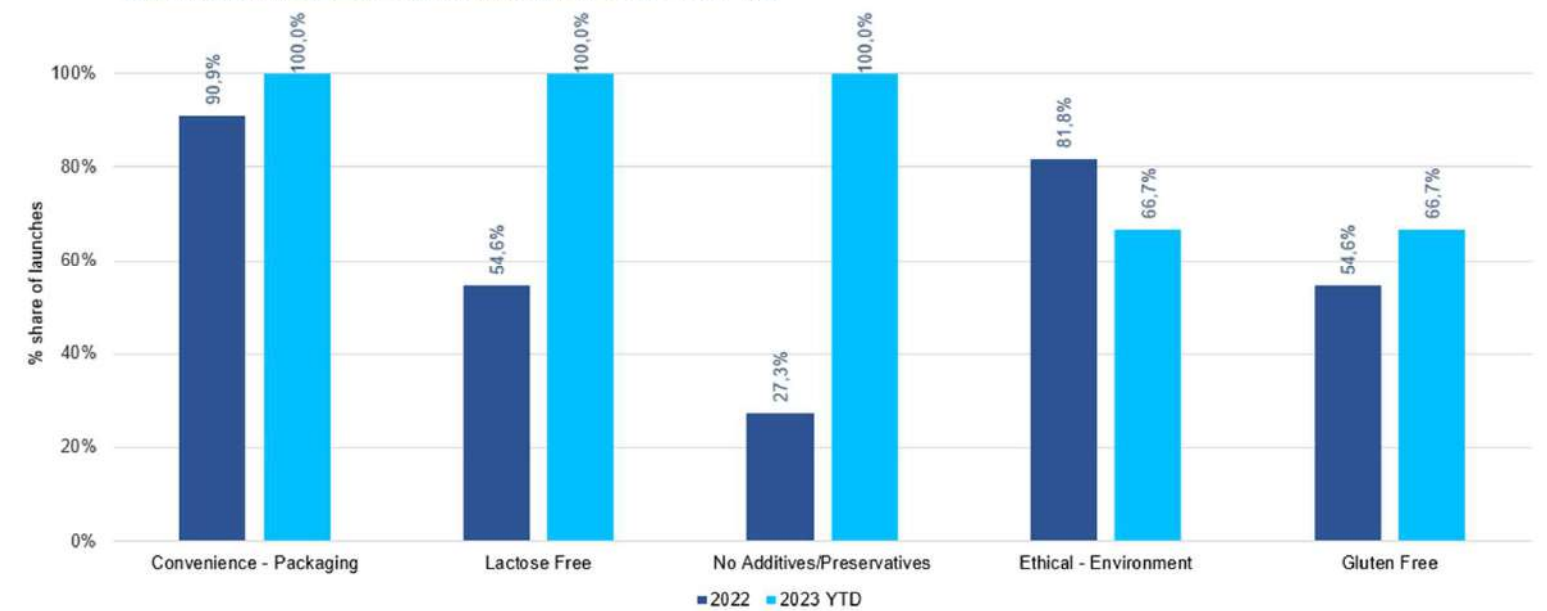
Source: Innova | Category | Genius F&B

14 ● INNOVA MARKET INSIGHTS

Chart Section

Dairy Alternative Drinks – United Arab Emirates

Figure 6 | KEY POSITIONINGS
(DAIRY ALTERNATIVE DRINKS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



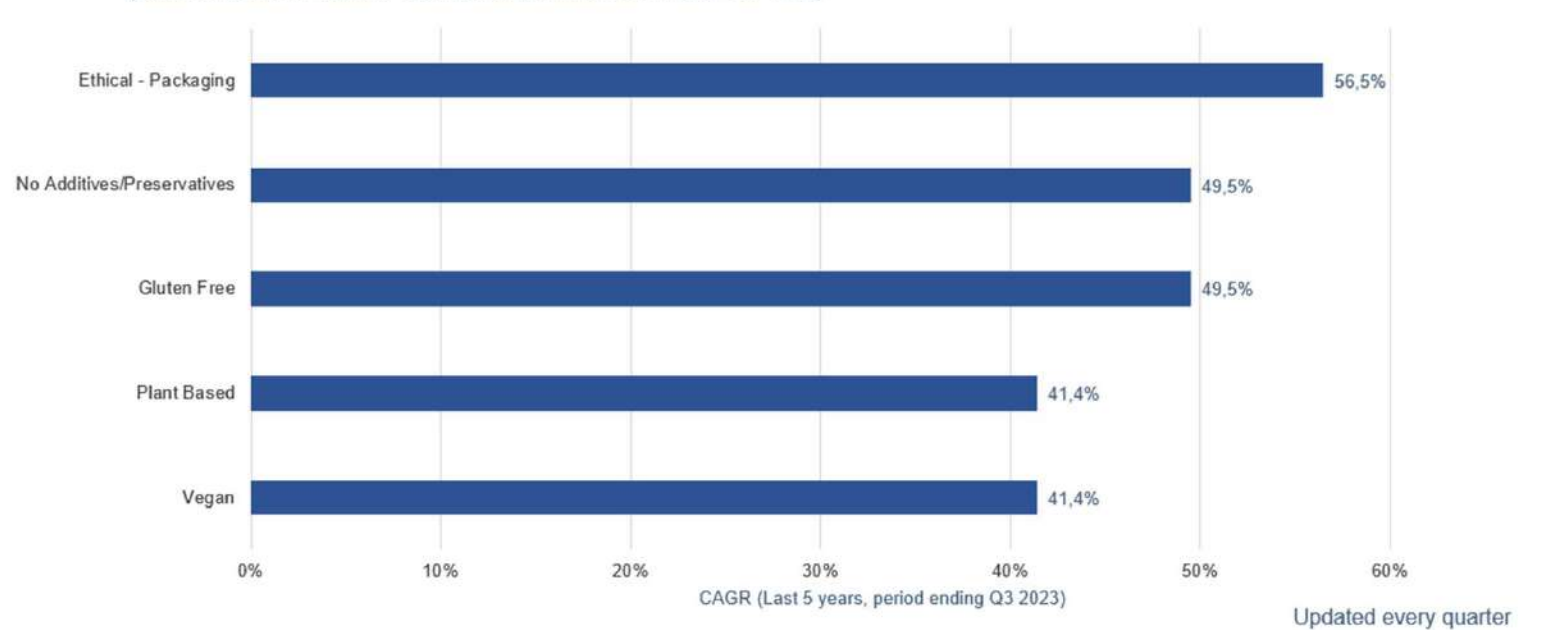
Source: Innova | Category | Genius F&B

15 ● INNOVA MARKET INSIGHTS

Chart Section

Dairy Alternative Drinks – United Arab Emirates

Figure 7 | FASTEST GROWING POSITIONINGS
(DAIRY ALTERNATIVE DRINKS - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



Updated every quarter

Source: Innova | Category | Genius F&B

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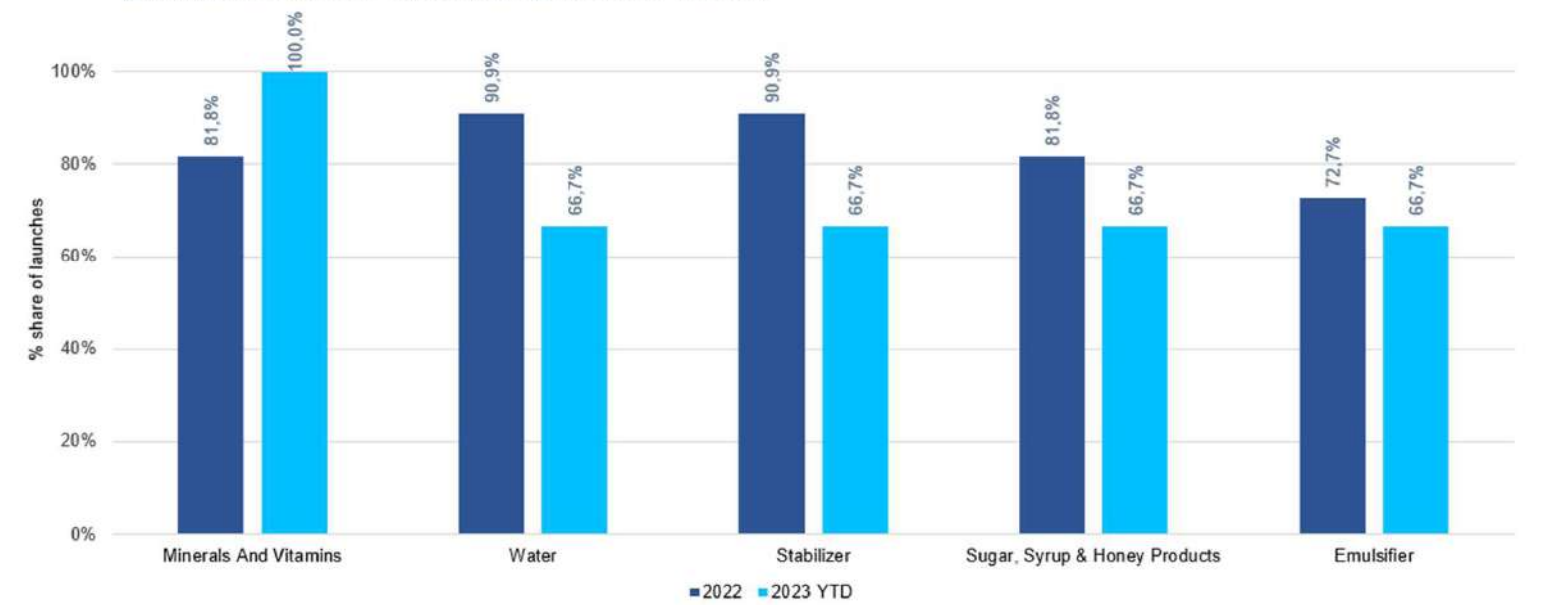
INTERNATIONAL



Chart Section

Dairy Alternative Drinks – United Arab Emirates

Figure 8 | KEY INGREDIENT GROUPS
(DAIRY ALTERNATIVE DRINKS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

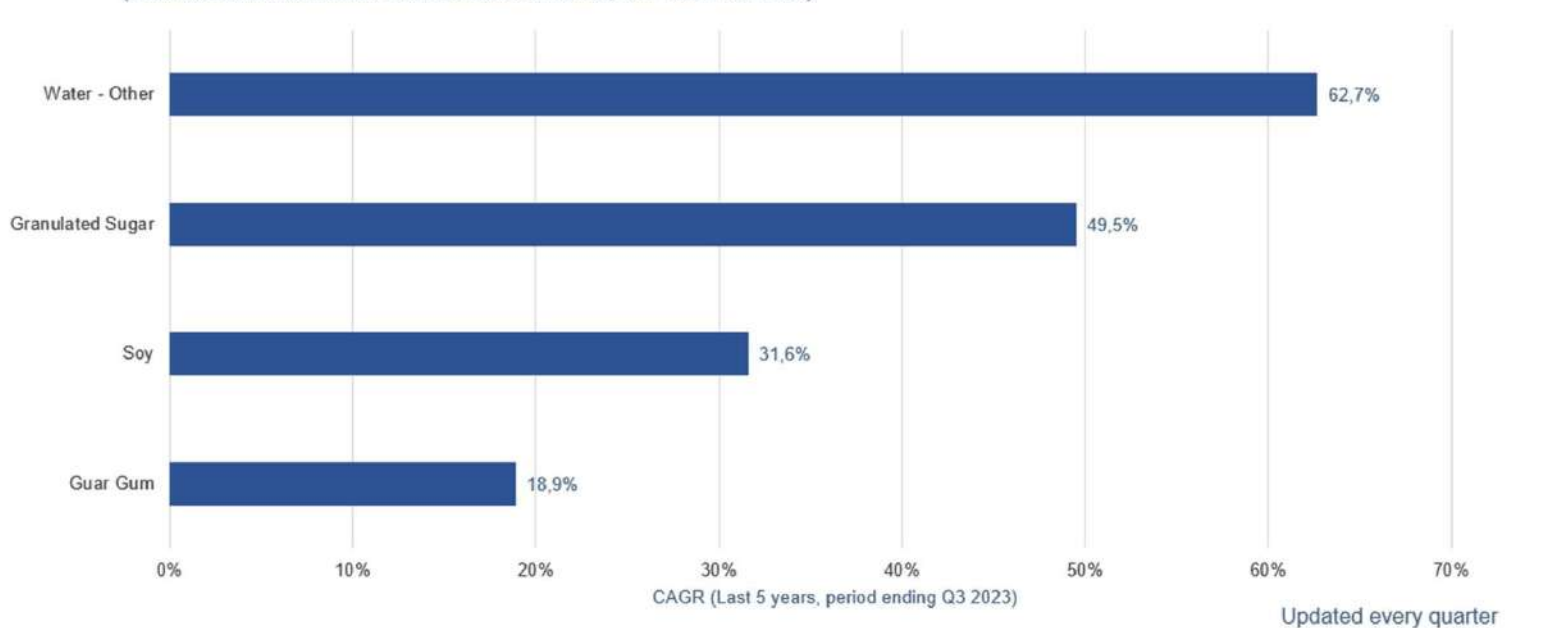


Source: Innova | Category | Genius F&B 17 INNOVA MARKET INSIGHTS

Chart Section

Dairy Alternative Drinks – United Arab Emirates

Figure 9 | FASTEST GROWING INGREDIENTS
(DAIRY ALTERNATIVE DRINKS - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



Source: Innova | Category | Genius F&B 18 INNOVA MARKET INSIGHTS



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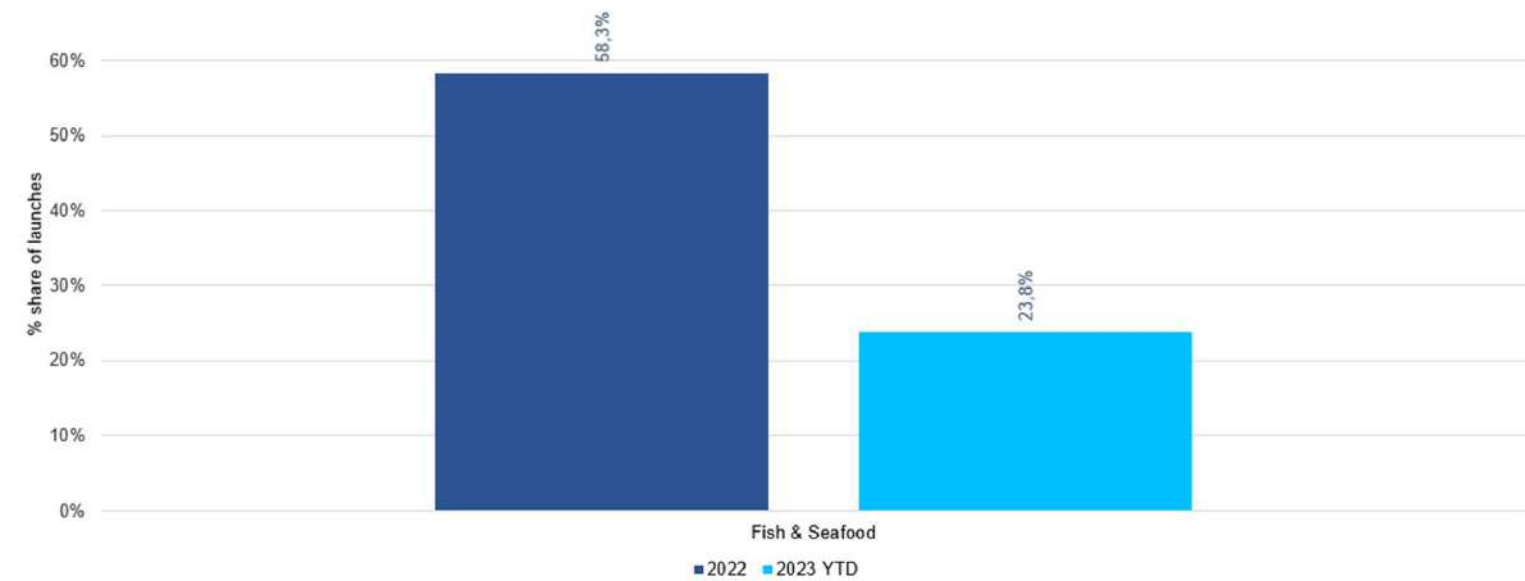




Chart Section

Fish & Seafood – United Arab Emirates

Figure 1 | FISH & SEAFOOD LAUNCHES AS % OF MEAT, FISH & EGGS LAUNCHES (FISH & SEAFOOD - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



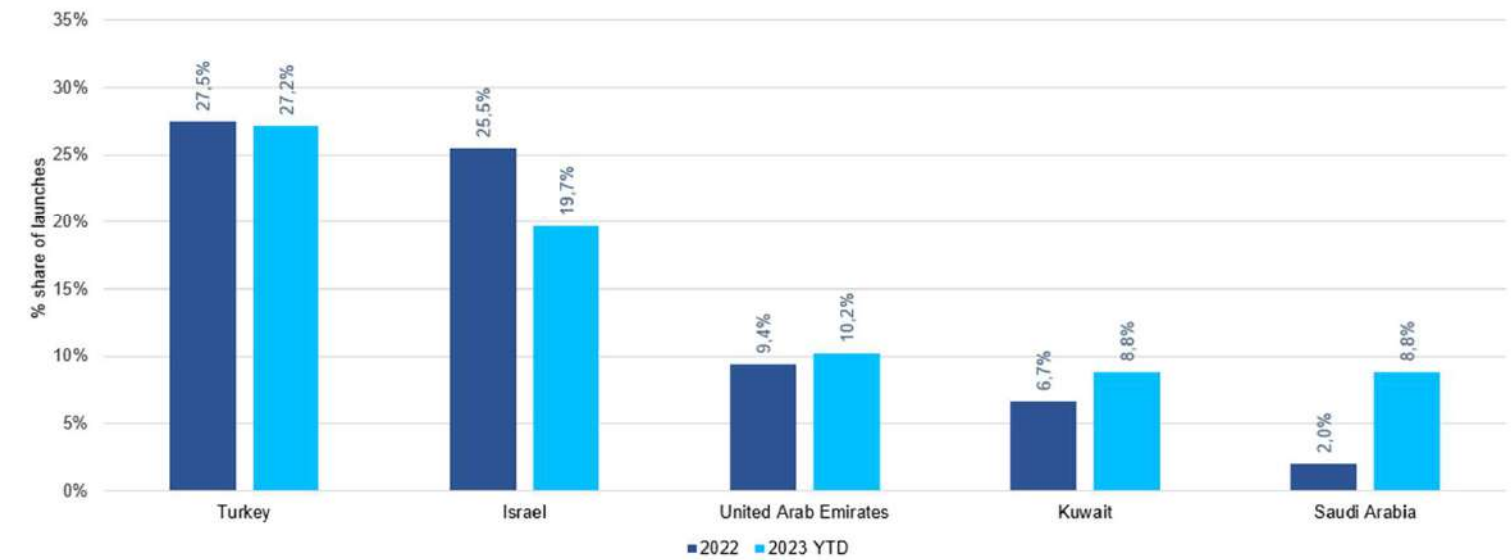
Source: Innova | Category | Genius F&B

11 INNOVA MARKET INSIGHTS

Chart Section

Fish & Seafood – United Arab Emirates

Figure 2 | KEY COUNTRIES
(FISH & SEAFOOD, 2022 - 2023 YTD)



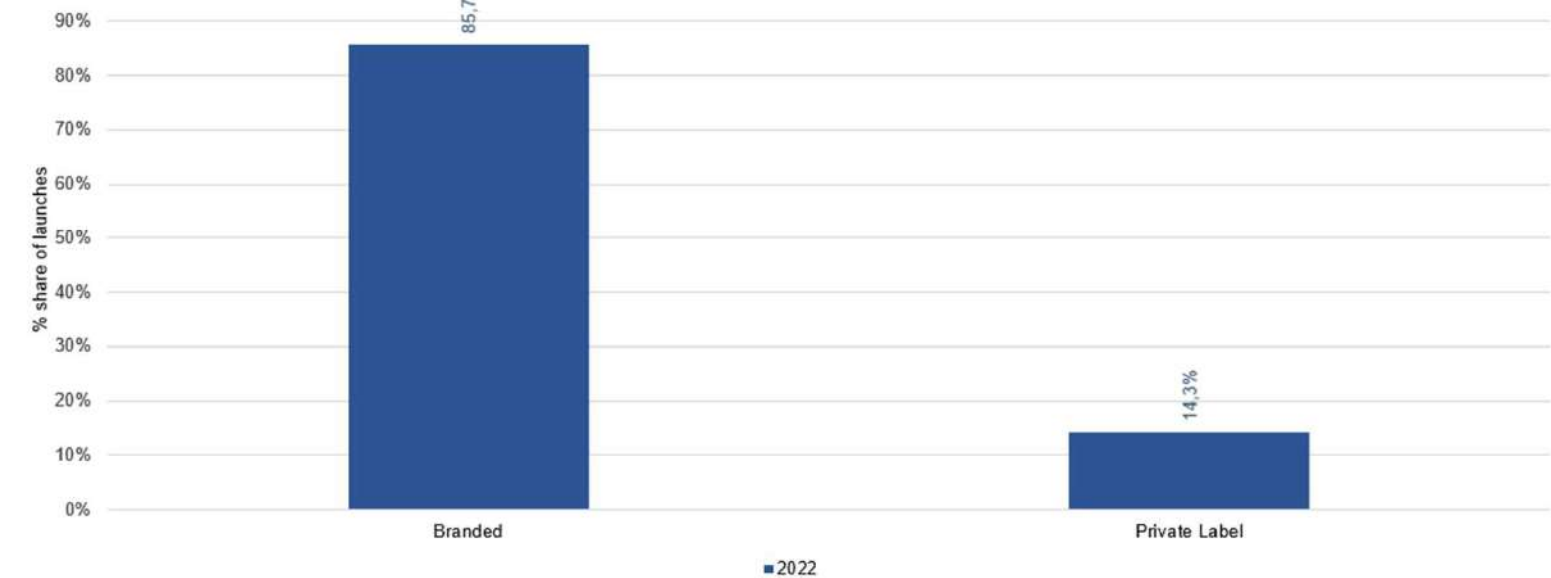
Source: Innova | Category | Genius F&B

12 ● INNOVA MARKET INSIGHTS

Chart Section

Fish & Seafood – United Arab Emirates

Figure 3 | BRANDS VS PRIVATE LABEL
(FISH & SEAFOOD - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



Source: Innova | Category | Genius F&B

13 ● INNOVA MARKET INSIGHTS

Chart Section

Fish & Seafood – United Arab Emirates

Figure 4 | KEY ACTIVE LAUNCHERS - COMPANIES
(FISH & SEAFOOD - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

| 2022 | 2023 YTD |
|-----------------------------|-----------------------------|
| Basamh Marketing (21.4%) | Basamh Marketing (13.3%) |
| California Garden (21.4%) | Santa Bremor (13.3%) |
| Carrefour (14.3%) | Bolton Alimentari (6.7%) |
| Bolton Alimentari (7.1%) | Century Pacific Food (6.7%) |
| Century Pacific Food (7.1%) | Freshly Frozen Foods (6.7%) |

Source: Innova | Category | Genius F&B

14 ● INNOVA MARKET INSIGHTS

Chart Section

Fish & Seafood – United Arab Emirates

Figure 5 | KEY ACTIVE LAUNCHERS - BRANDS
(FISH & SEAFOOD - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

| 2022 | 2023 YTD |
|---------------------------|----------------------|
| Al Alali (21.4%) | Al Alali (13.3%) |
| California Garden (21.4%) | Santa Bremor (13.3%) |
| 555 (7.1%) | 555 (6.7%) |
| American Fresh (7.1%) | Deep Blue (6.7%) |
| Carrefour Extra (7.1%) | Freshly Foods (6.7%) |

Source: Innova | Category | Genius F&B

15 ● INNOVA MARKET INSIGHTS



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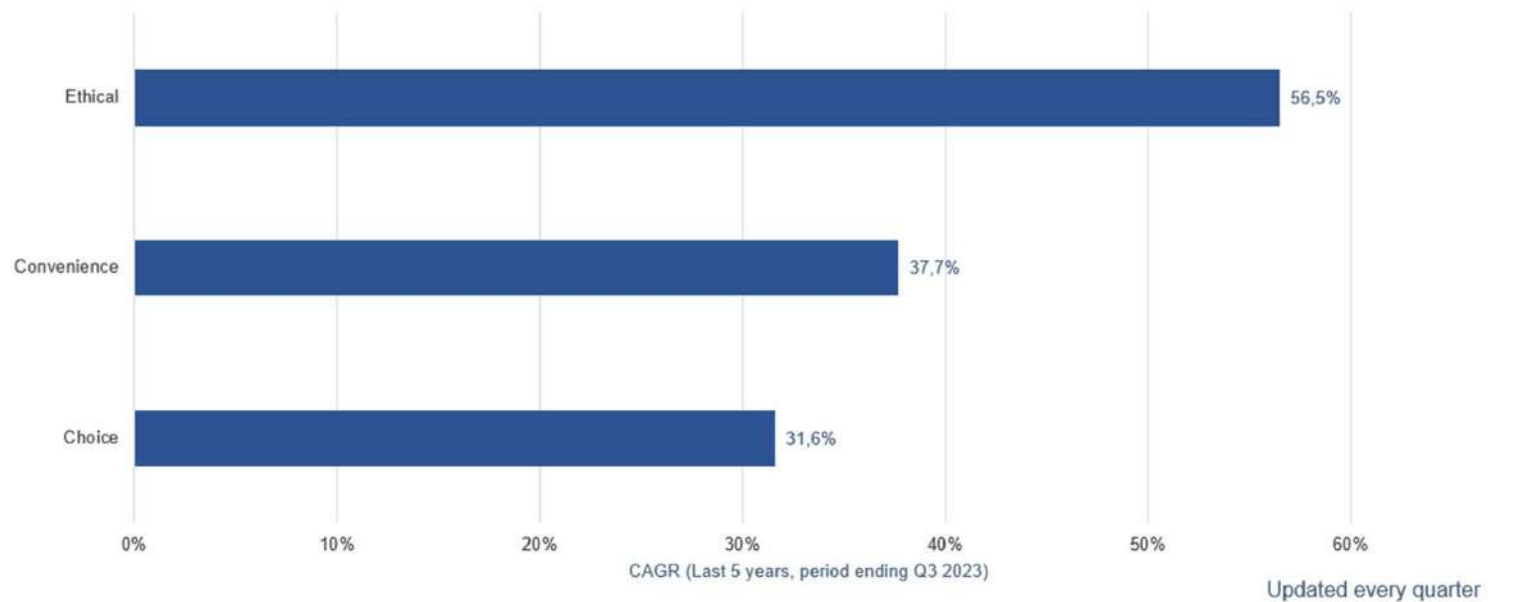
INTERNATIONAL



Chart Section

Fish & Seafood – United Arab Emirates

Figure 6 | FASTEST GROWING POSITIONING CATEGORIES
(FISH & SEAFOOD - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



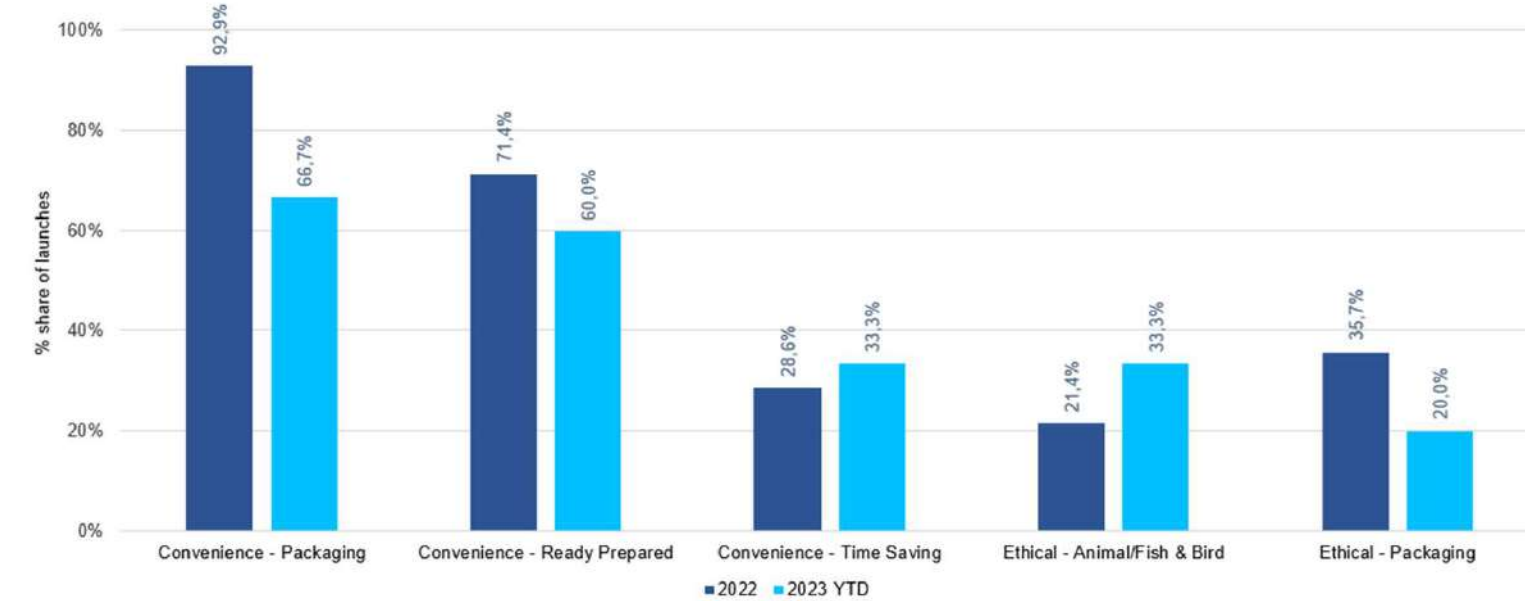
Source: Innova | Category | Genius F&B

16 ● INNOVA MARKET INSIGHTS

Chart Section

Fish & Seafood – United Arab Emirates

Figure 7 | KEY POSITIONINGS
(FISH & SEAFOOD - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



Source: Innova | Category | Genius F&B

17 ● INNOVA MARKET INSIGHTS



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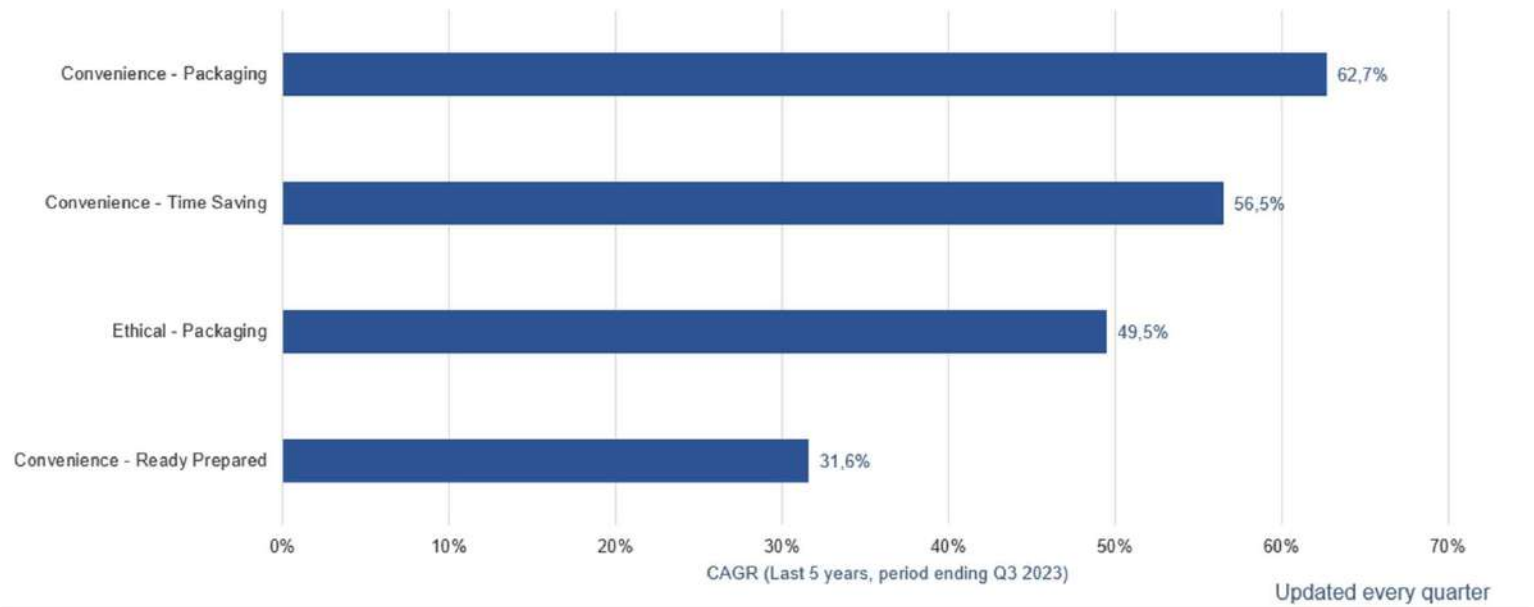
INTERNATIONAL



Chart Section

Fish & Seafood – United Arab Emirates

Figure 8 | FASTEST GROWING POSITIONINGS
(FISH & SEAFOOD - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



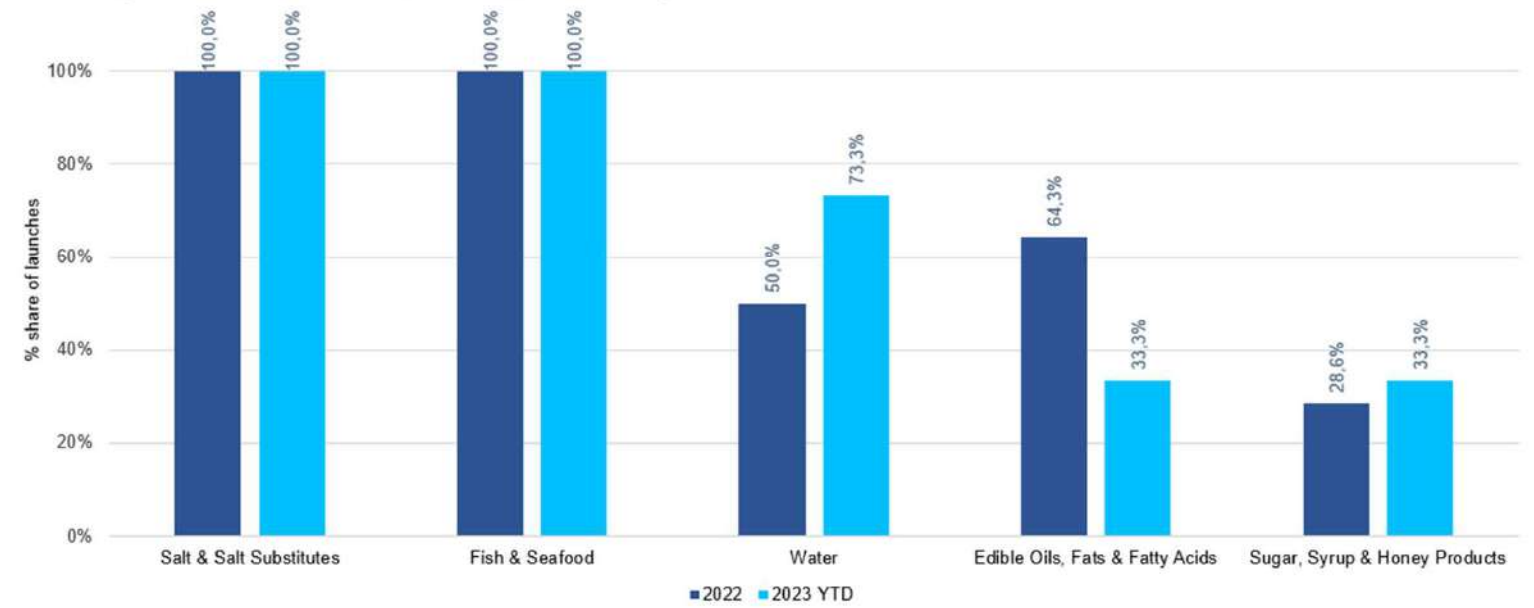
Source: Innova | Category | Genius F&B

18 ● INNOVA MARKET INSIGHTS

Chart Section

Fish & Seafood – United Arab Emirates

Figure 9 | KEY INGREDIENT GROUPS
(FISH & SEAFOOD - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



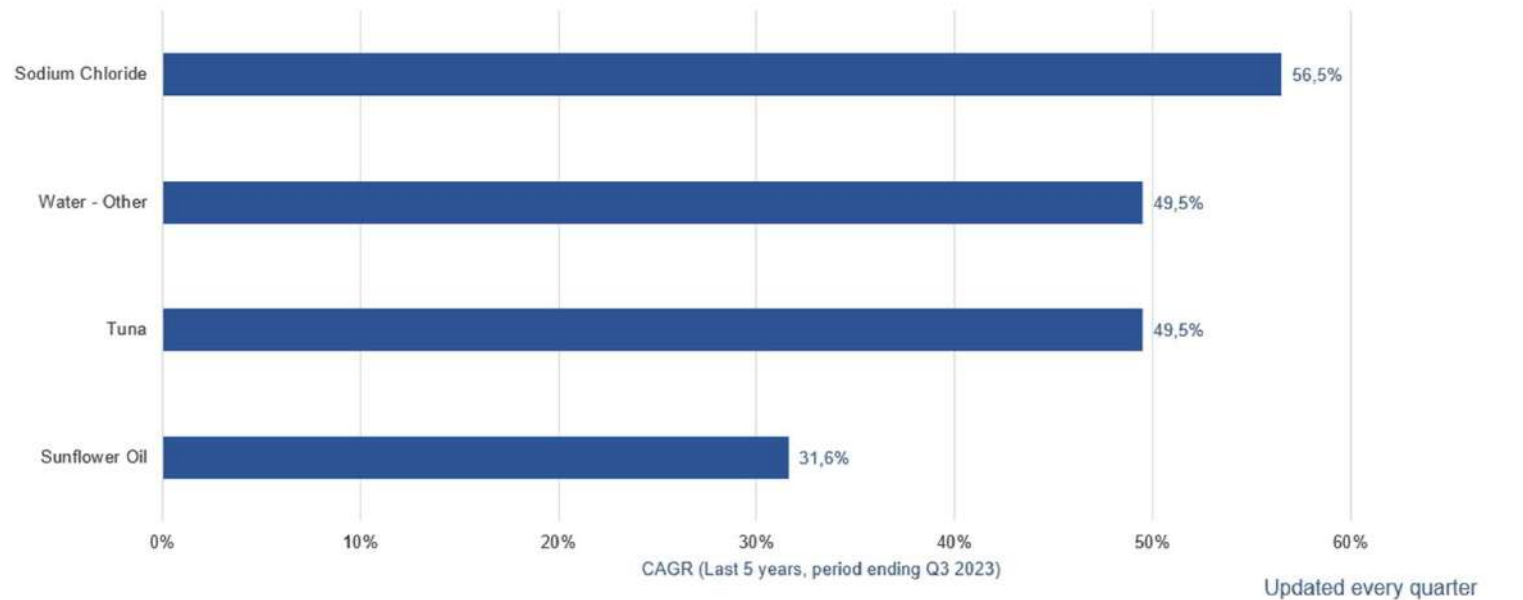
Source: Innova | Category | Genius F&B

19 ● INNOVA MARKET INSIGHTS

Chart Section

Fish & Seafood – United Arab Emirates

Figure 10 | FASTEST GROWING INGREDIENTS
(FISH & SEAFOOD - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



Source: Innova | Category | Genius F&B

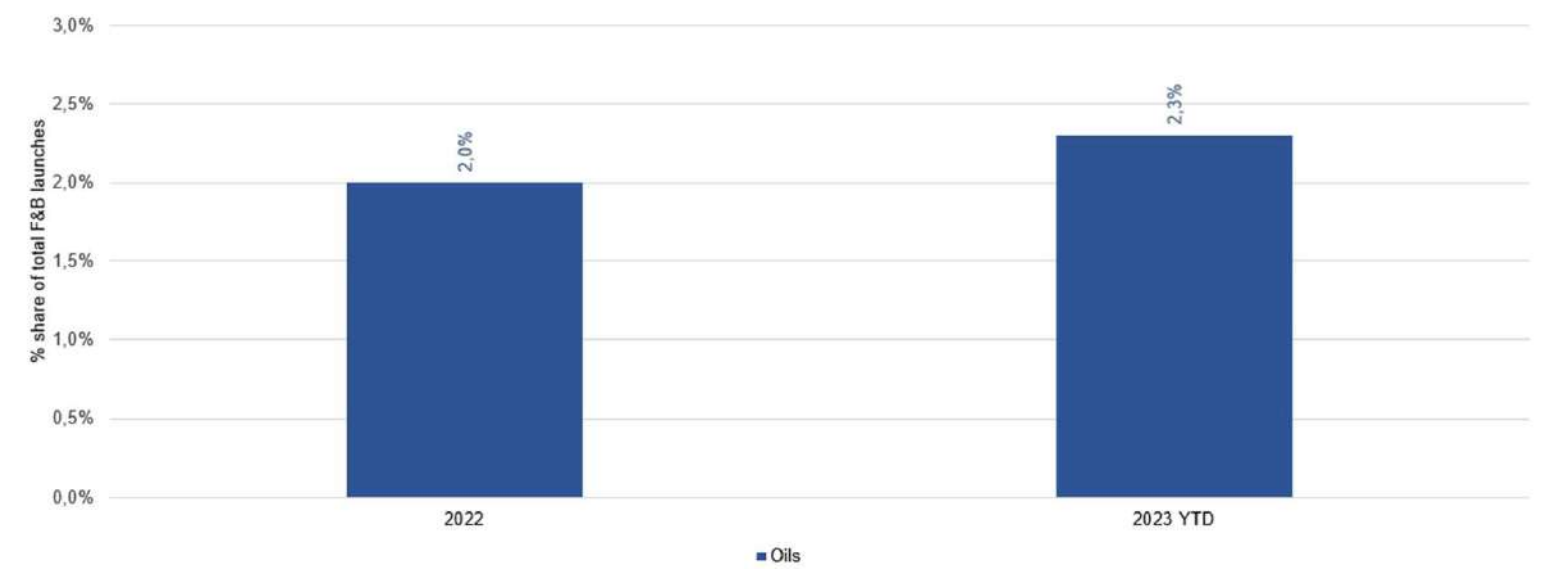
20 ● INNOVA MARKET INSIGHTS



Chart Section

Oils – United Arab Emirates

Figure 1 | OILS LAUNCHES AS % OF FOOD & BEVERAGE LAUNCHES (OILS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



Source: Innova | Category | Genius F&B

11 INNOVA MARKET INSIGHTS

Chart Section

Oils – United Arab Emirates

Figure 2 | KEY COUNTRIES
(OILS, 2022 - 2023 YTD)



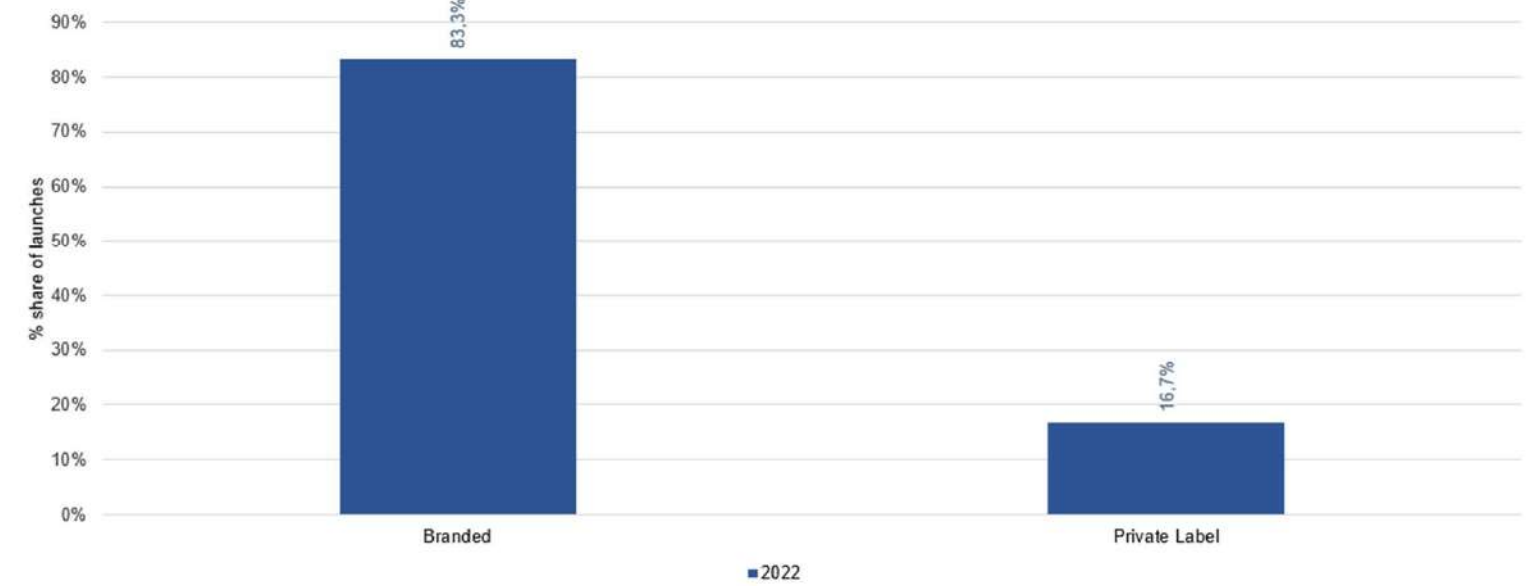
Source: Innova | Category | Genius F&B

12 ● INNOVA MARKET INSIGHTS

Chart Section

Oils – United Arab Emirates

Figure 3 | BRANDS VS PRIVATE LABEL
(OILS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



Source: Innova | Category | Genius F&B

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Chart Section

Oils – United Arab Emirates

Figure 4 | KEY ACTIVE LAUNCHERS - BRANDS
(OILS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

| 2022 | 2023 YTD |
|----------------------|-----------------|
| Afia (16.7%) | Abali (4.0%) |
| Carrefour (16.7%) | Afia (4.0%) |
| Filippo Berio (8.3%) | Altivo (4.0%) |
| Noor (8.3%) | Atd (4.0%) |
| Parachute (8.3%) | Bertolli (4.0%) |

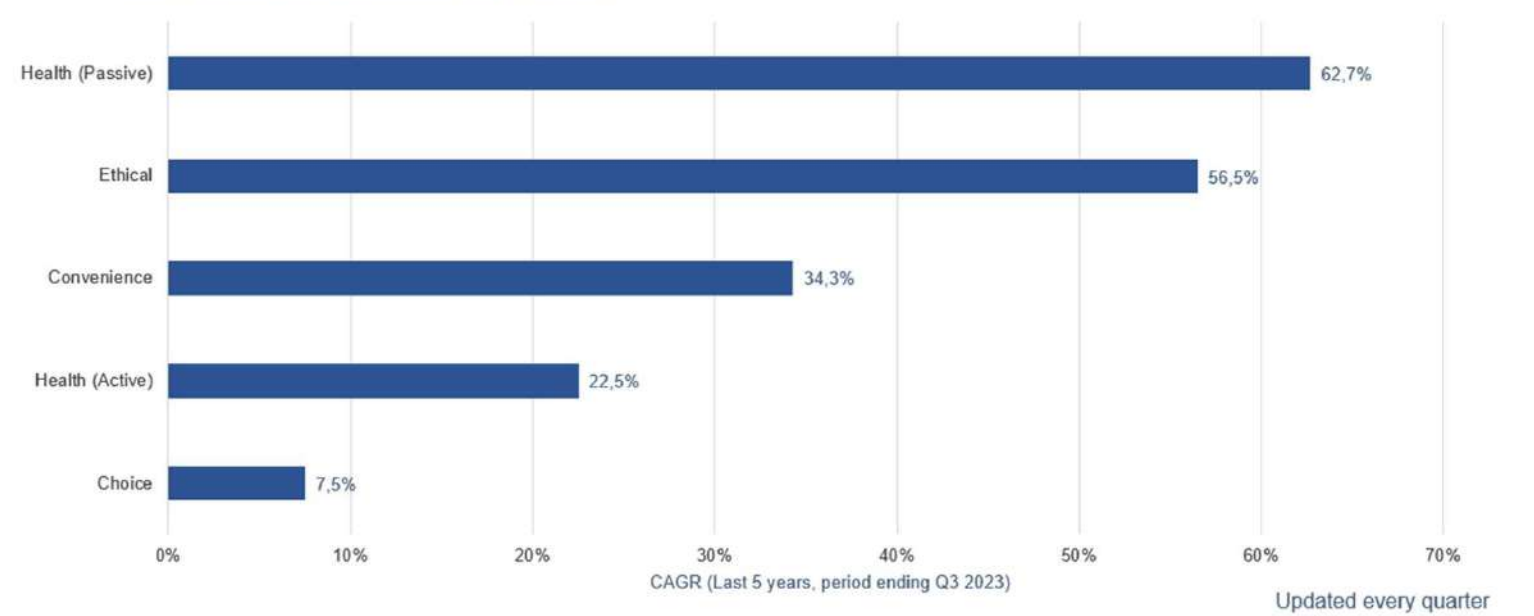
Source: Innova | Category | Genius F&B

14 ● INNOVA MARKET INSIGHTS

Chart Section

Oils – United Arab Emirates

Figure 5 | FASTEST GROWING POSITIONING CATEGORIES
(OILS - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



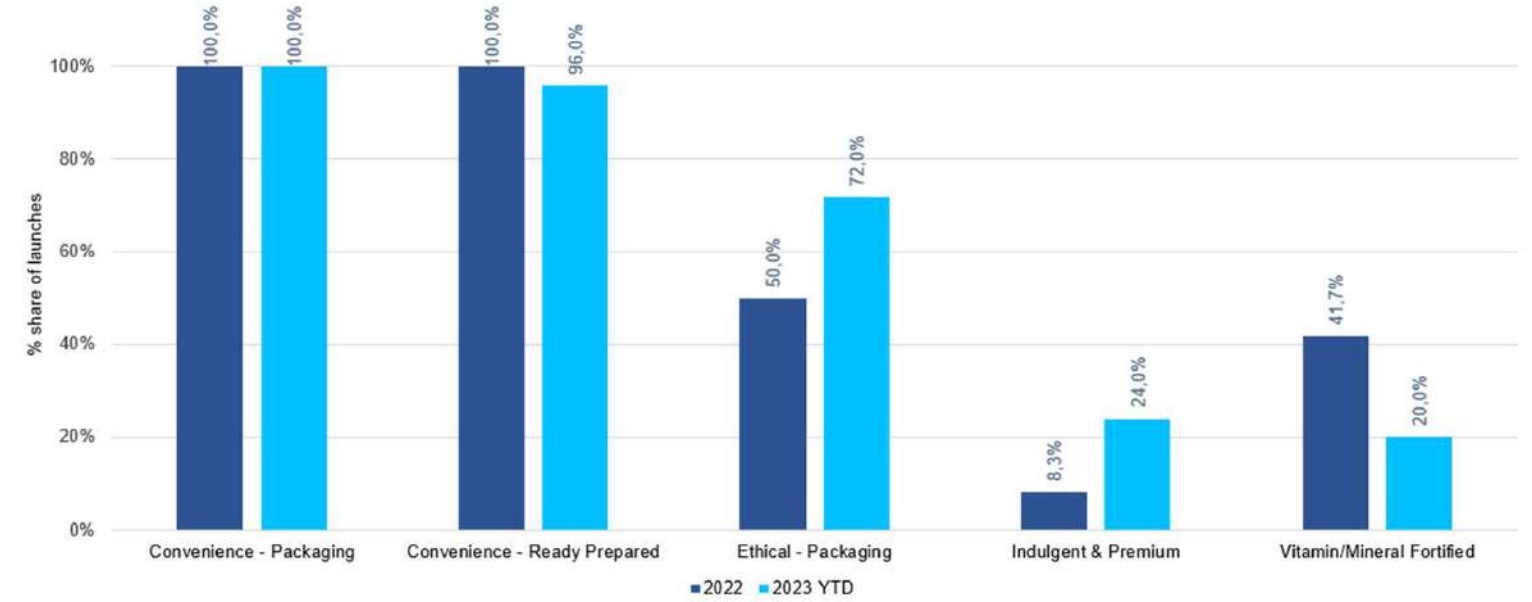
Source: Innova | Category | Genius F&B

15 ● INNOVA MARKET INSIGHTS

Chart Section

Oils – United Arab Emirates

Figure 6 | KEY POSITIONINGS
(OILS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



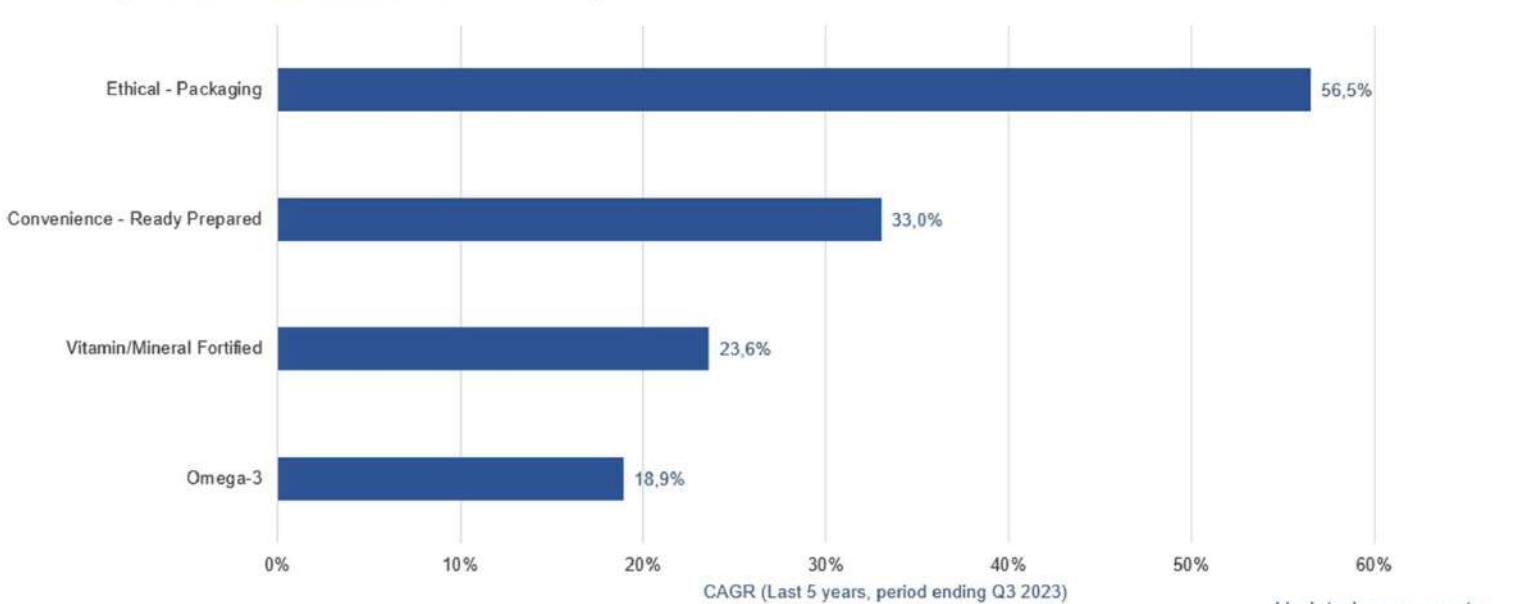
Source: Innova | Category | Genius F&B

16 ● INNOVA MARKET INSIGHTS

Chart Section

Oils – United Arab Emirates

Figure 7 | FASTEST GROWING POSITIONINGS
(OILS - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



Updated every quarter

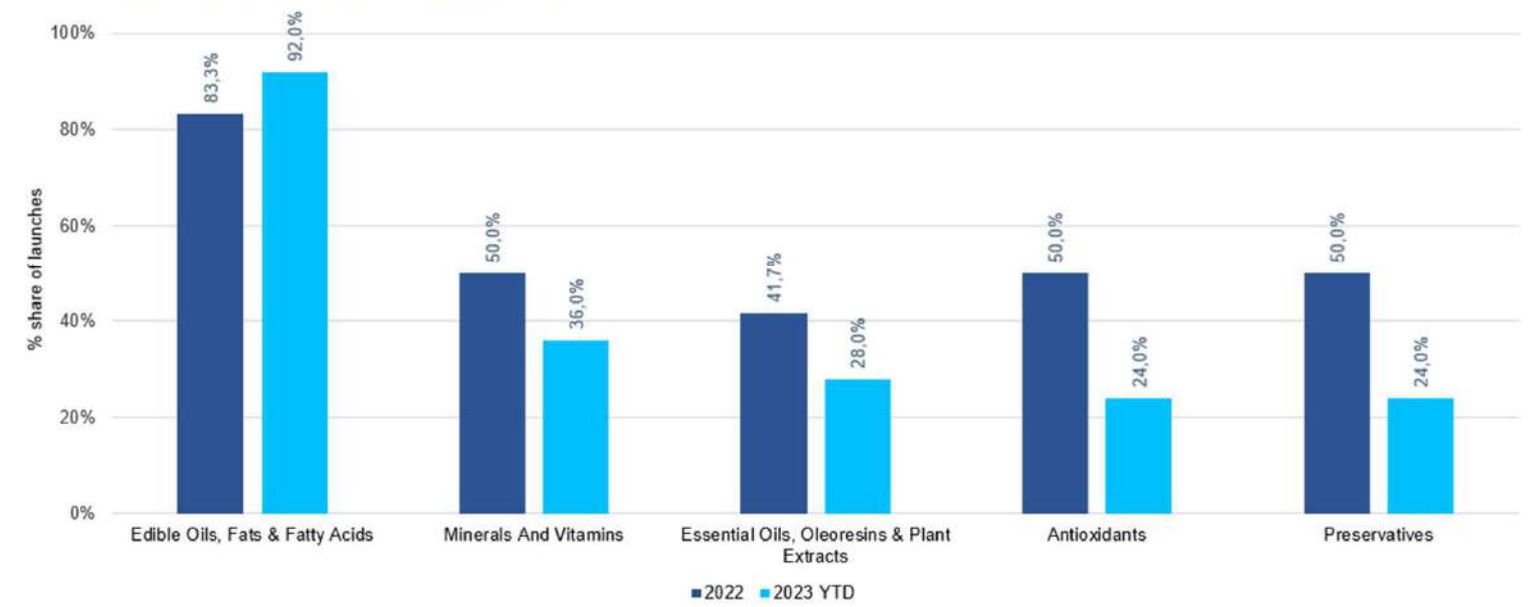
Source: Innova | Category | Genius F&B

17 ● INNOVA MARKET INSIGHTS

Chart Section

Oils – United Arab Emirates

Figure 8 | KEY INGREDIENT GROUPS
(OILS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



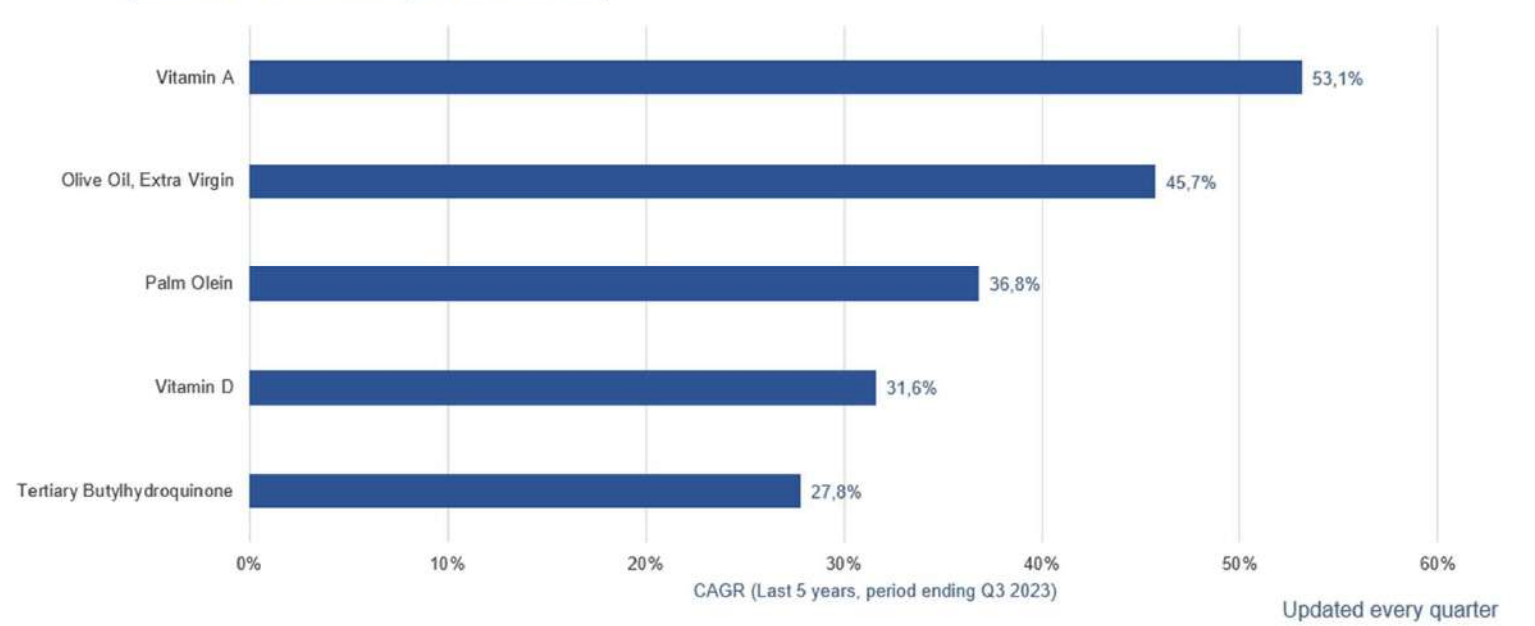
Source: Innova | Category | Genius F&B

18 ● INNOVA MARKET INSIGHTS

Chart Section

Oils – United Arab Emirates

Figure 9 | FASTEST GROWING INGREDIENTS
(OILS - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



Source: Innova | Category | Genius F&B

19 ● INNOVA MARKET INSIGHTS



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INTERNATIONAL

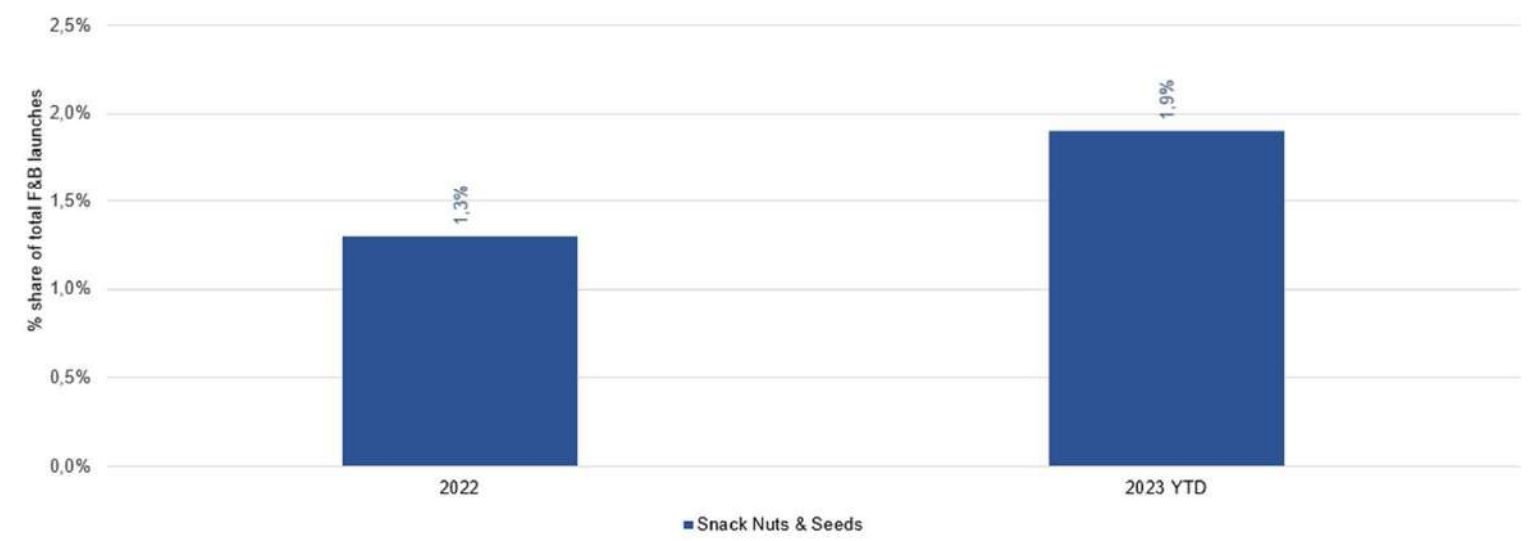




Chart Section

Snack Nuts & Seeds – United Arab Emirates

Figure 1 | SNACK NUTS & SEEDS LAUNCHES AS % OF FOOD & BEVERAGE LAUNCHES
(SNACK NUTS & SEEDS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

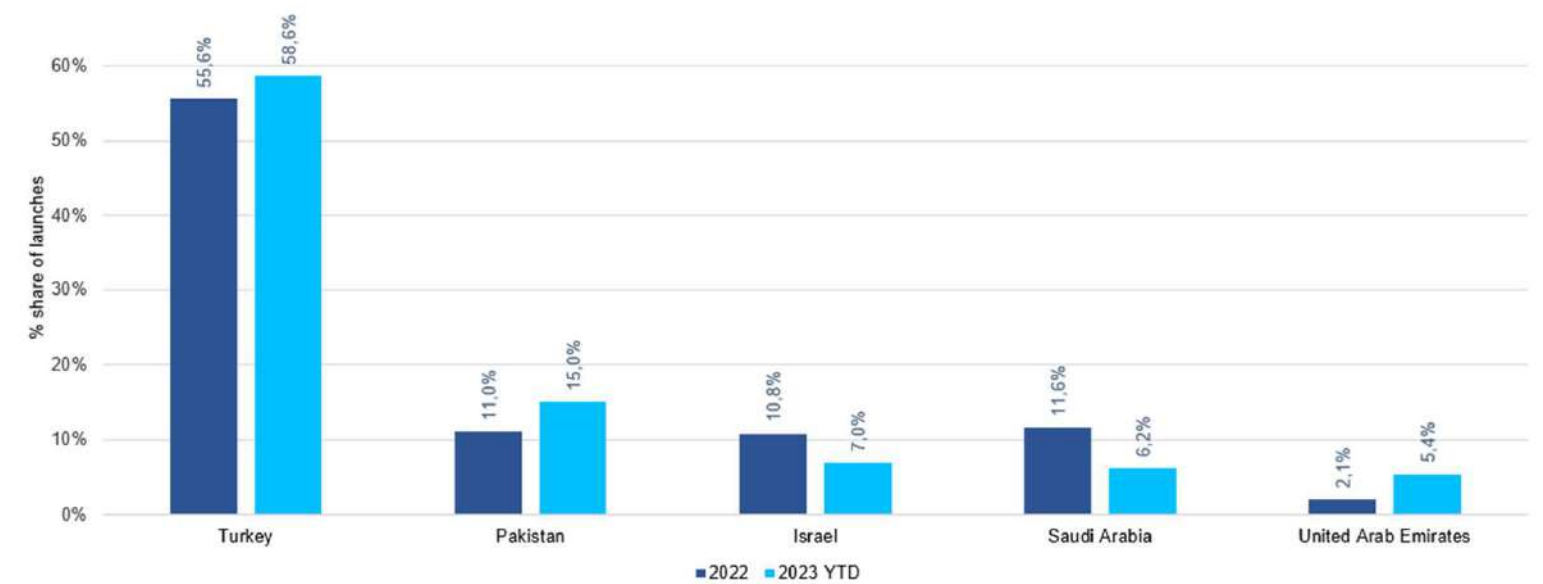


Source: Innova | Category | Genius F&B

Chart Section

Snack Nuts & Seeds – United Arab Emirates

Figure 2 | KEY COUNTRIES
(SNACK NUTS & SEEDS, 2022 - 2023 YTD)



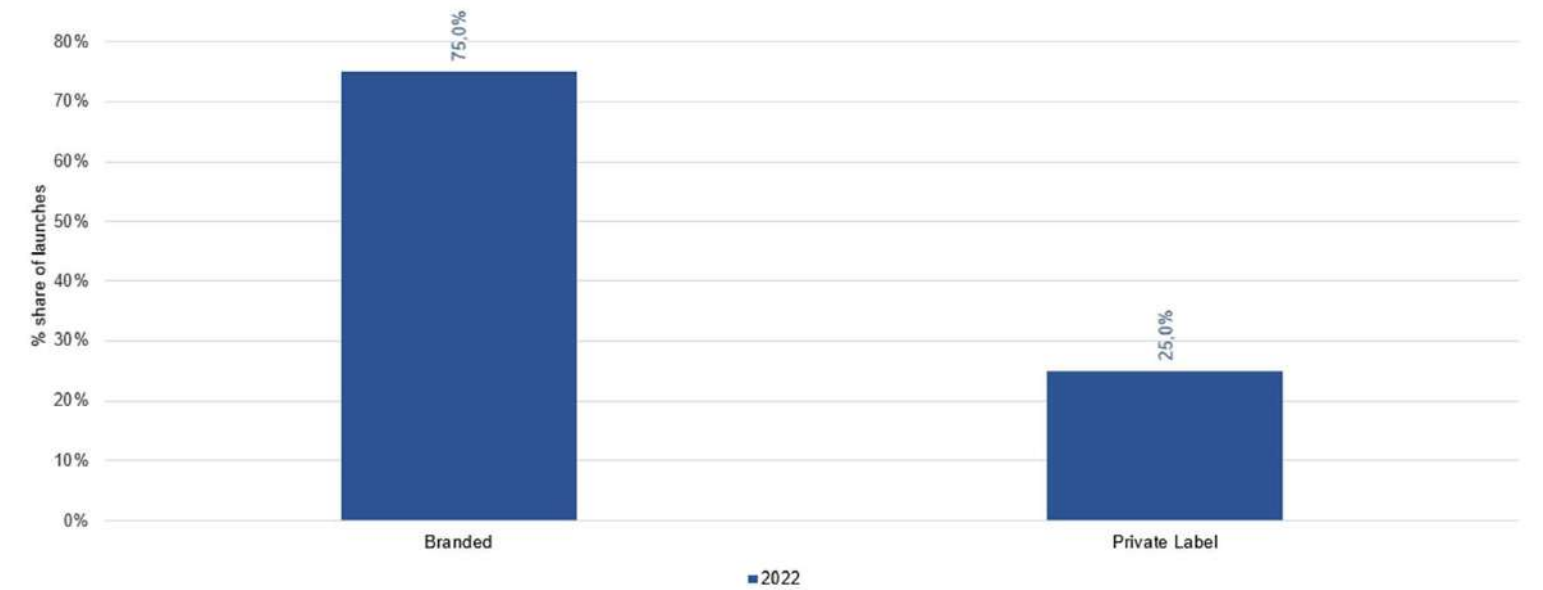
Source: Innova | Category | Genius F&B

12 ● INNOVA MARKET INSIGHTS

Chart Section

Snack Nuts & Seeds – United Arab Emirates

Figure 3 | BRANDS VS PRIVATE LABEL
(SNACK NUTS & SEEDS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



Source: Innova | Category | Genius F&B

13 ● INNOVA MARKET INSIGHTS

Chart Section

Snack Nuts & Seeds – United Arab Emirates

Figure 4 | KEY ACTIVE LAUNCHERS - COMPANIES
(SNACK NUTS & SEEDS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

| 2022 | 2023 YTD |
|------------------------------------|--|
| Gyma Food Industries (25.0%) | Best Food Company (23.8%) |
| Al Homaizi Food Industries (12.5%) | Koch (14.3%) |
| Best Food Company (12.5%) | Wonderful Pistachios And Almonds (14.3%) |
| Carrefour (12.5%) | General Trading (9.5%) |
| G F I Enterprises (12.5%) | Gyma Food Industries (9.5%) |

Source: Innova | Category | Genius F&B

Chart Section

Snack Nuts & Seeds – United Arab Emirates

Figure 5 | KEY ACTIVE LAUNCHERS - BRANDS
(SNACK NUTS & SEEDS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

| 2022 | 2023 YTD |
|-------------------|------------------------------|
| Bayara (25.0%) | Best (23.8%) |
| Al Rifai (12.5%) | Koch (14.3%) |
| Best (12.5%) | Wonderful Pistachios (14.3%) |
| Camel (12.5%) | Bayara (9.5%) |
| Carrefour (12.5%) | Mk (9.5%) |

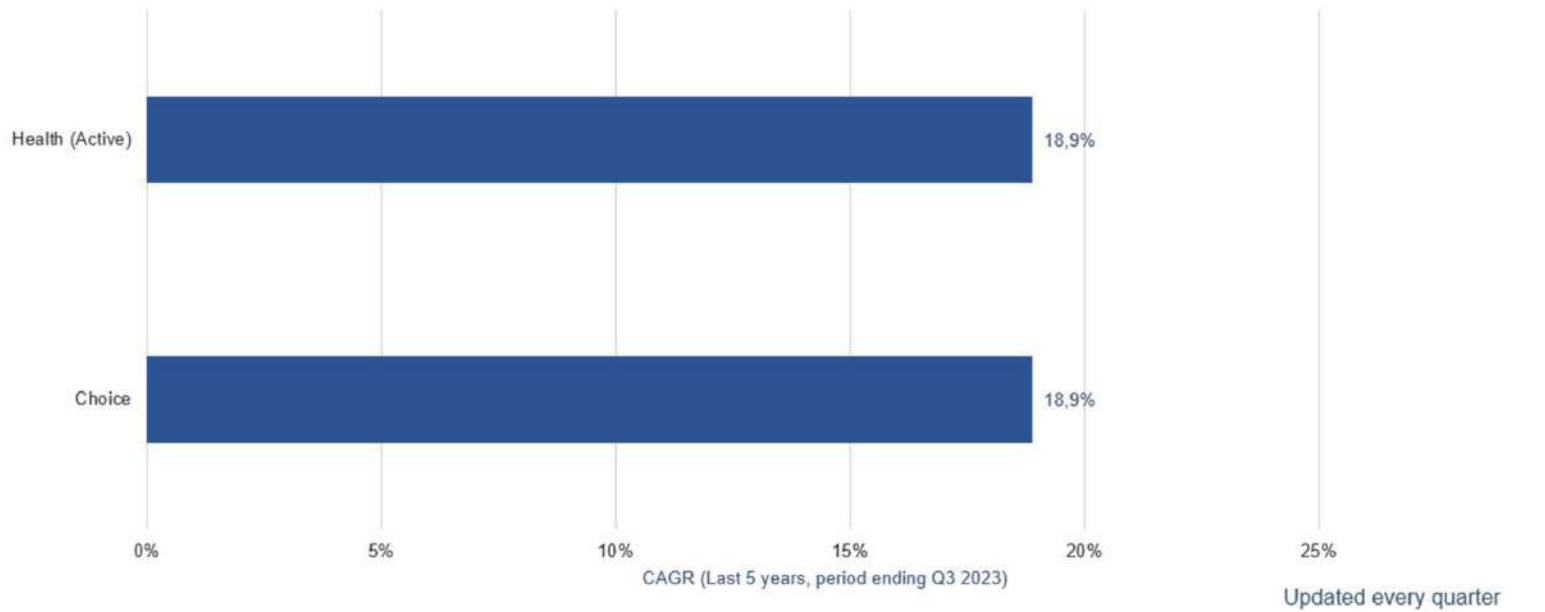
Source: Innova | Category | Genius F&B



Chart Section

Snack Nuts & Seeds – United Arab Emirates

Figure 6 | FASTEST GROWING POSITIONING CATEGORIES
(SNACK NUTS & SEEDS - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)

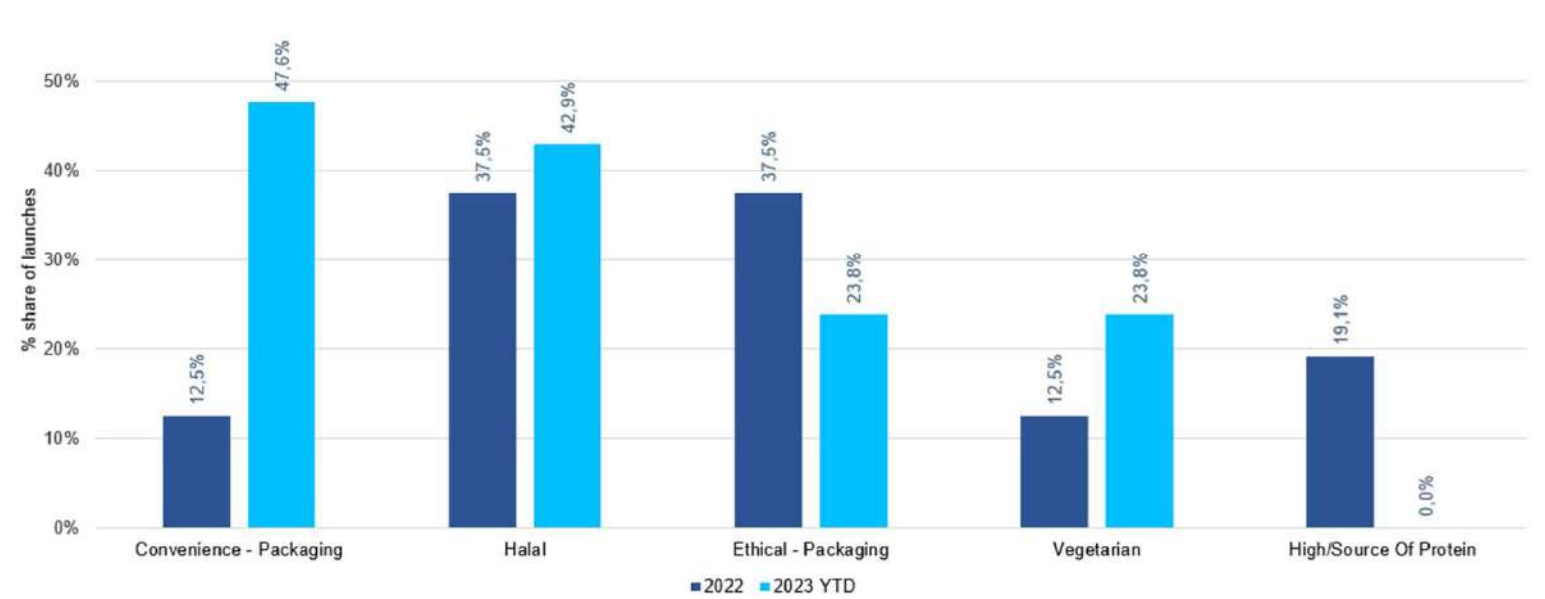


Source: Innova | Category | Genius F&B 16 ● INNOVA MARKET INSIGHTS

Chart Section

Snack Nuts & Seeds – United Arab Emirates

Figure 7 | KEY POSITIONINGS
(SNACK NUTS & SEEDS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

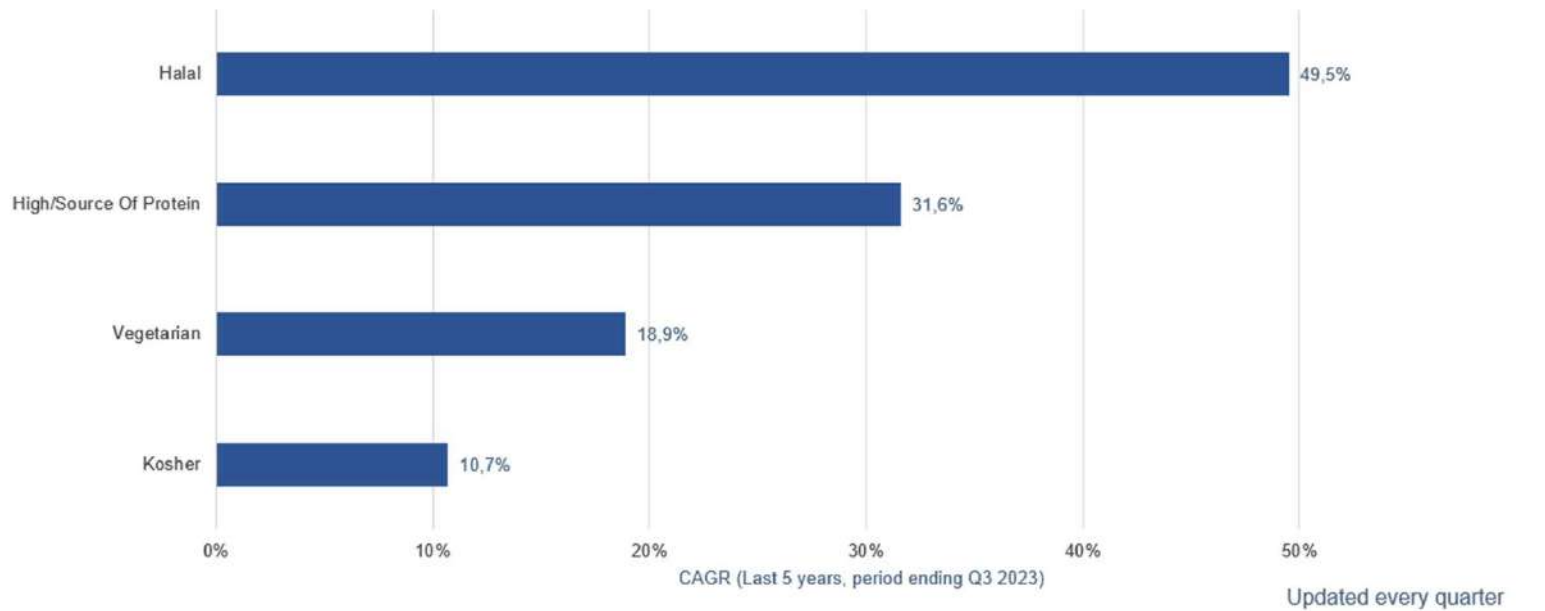


Source: Innova | Category | Genius F&B 17 ● INNOVA MARKET INSIGHTS

Chart Section

Snack Nuts & Seeds – United Arab Emirates

Figure 8 | FASTEST GROWING POSITIONINGS
(SNACK NUTS & SEEDS - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)

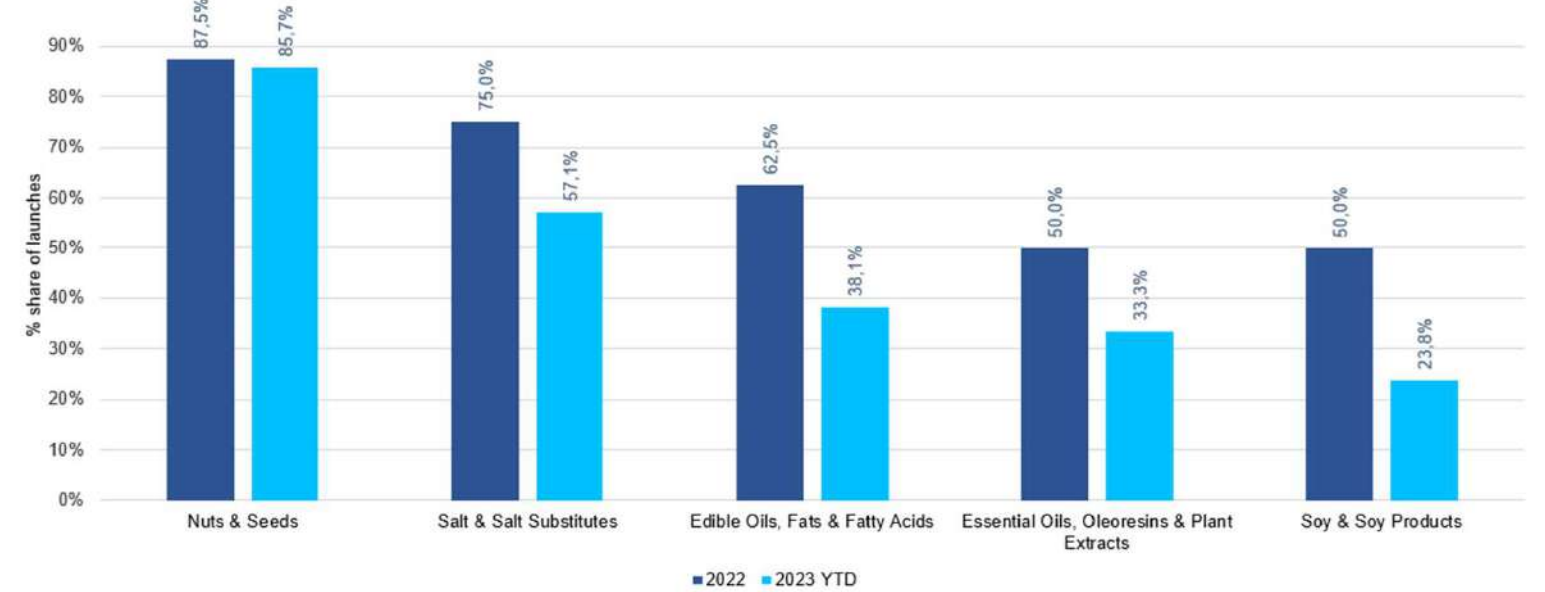


Source: Innova | Category | Genius F&B 18 ● INNOVA MARKET INSIGHTS

Chart Section

Snack Nuts & Seeds – United Arab Emirates

Figure 9 | KEY INGREDIENT GROUPS
(SNACK NUTS & SEEDS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



Source: Innova | Category | Genius F&B 19 ● INNOVA MARKET INSIGHTS



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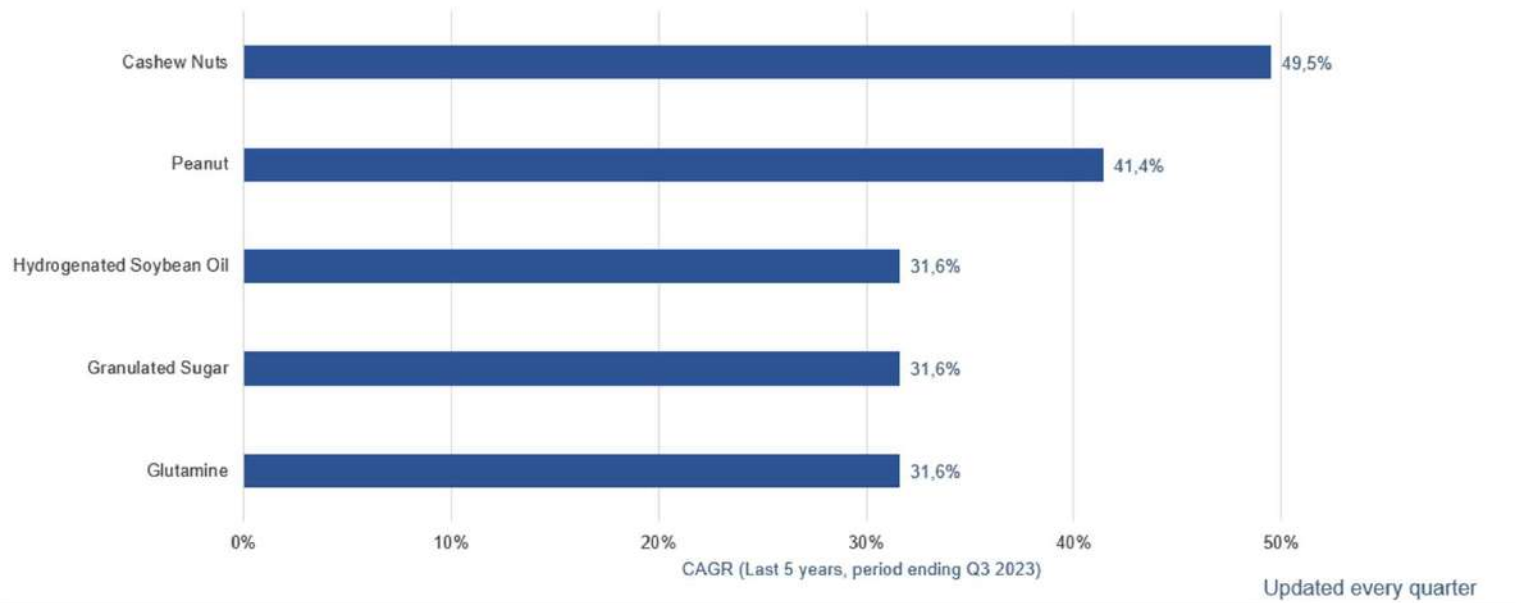
INTERNATIONAL



Chart Section

Snack Nuts & Seeds – United Arab Emirates

Figure 10 | FASTEST GROWING INGREDIENTS
(SNACK NUTS & SEEDS - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



Source: Innova | Category | Genius F&B 20 ● INNOVA MARKET INSIGHTS

Products Section



Planters Honey Roasted Peanuts

United Arab Emirates, Nov 2023 [View Result](#)

Description: Honey roasted peanuts in a 978g plastic PET jar.



Koch Special Pistachio

United Arab Emirates, Oct 2023 [View Result](#)

Description: Pistachio in a 150g plastic flat pouch.



Koch Special Baked Cashew Nuts

United Arab Emirates, Oct 2023 [View Result](#)

Description: Baked cashew nuts in a 150g plastic flat pouch.

Source: Innova | Category | Genius F&B



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INTERNATIONAL



Appendix VI Snacks Nuts & Seeds

Products Section



Koch Special Roasted Cashews

United Arab Emirates, Oct 2023 [View Result](#)

Description: Roasted cashews in a 150g plastic flat pouch.



Wonderful Pistachios Salt And Pepper Flavored Pistachios

United Arab Emirates, Sep 2023 [View Result](#)

Description: Salt and pepper flavored pistachios in a 1.36kg plastic flat pouch.



Wonderful Pistachios Roasted And Salted Pistachios

United Arab Emirates, Sep 2023 [View Result](#)

Description: Roasted and salted pistachios in a 35g plastic flat pouch.

Source: Innova | Category | Genius F&B

Products Section



Munchbox Nutty Professor Sharing Pack

United Arab Emirates, Sep 2023 [View Result](#)

Description: Mixture of selected nuts (walnuts, roasted almonds and cashews), in a 150g resealable paper...



Best Salted Peanut

United Arab Emirates, Aug 2023 [View Result](#)

Description: Fifteen plastic flat pouches of salted peanut held in a carton folded box.



Best Salted Peanuts

United Arab Emirates, Jul 2023 [View Result](#)

Description: Roasted and salted peanuts in a 550g metal tin with plastic lid.

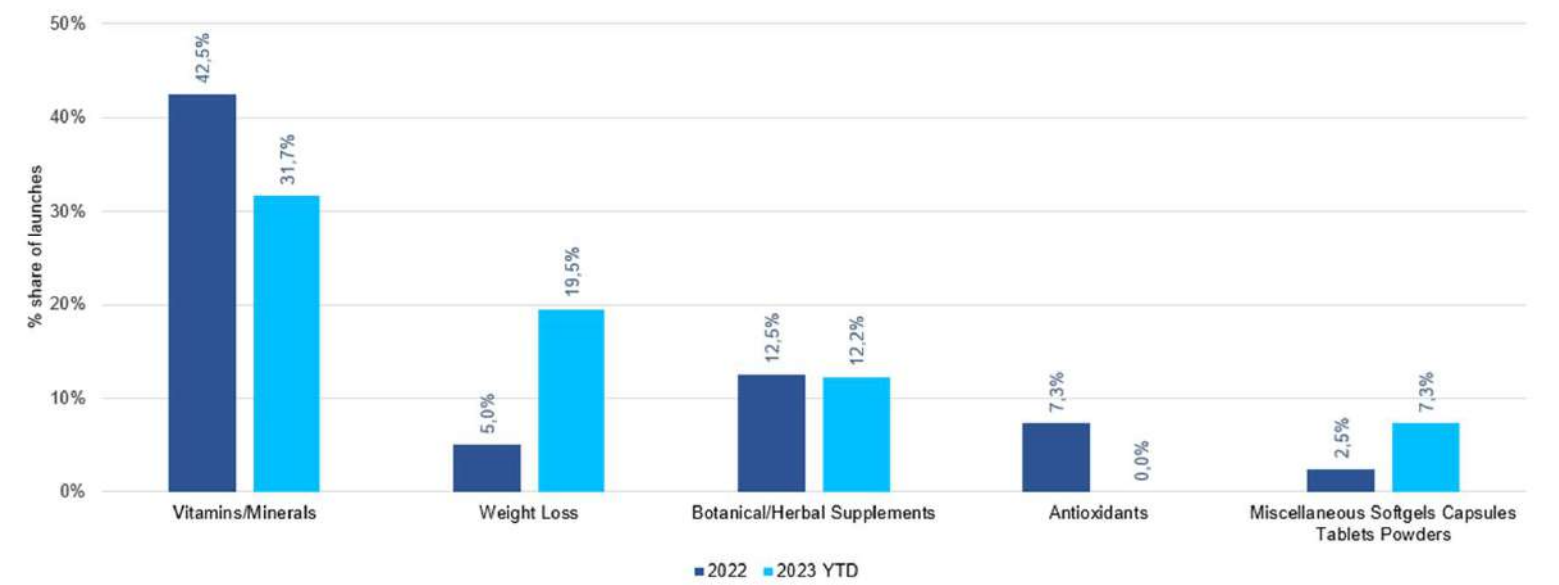
Source: Innova | Category | Genius F&B



Chart Section

Supplements – United Arab Emirates

Figure 1 | KEY SUBCATEGORIES AS % OF SUPPLEMENTS LAUNCHES (SUPPLEMENTS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

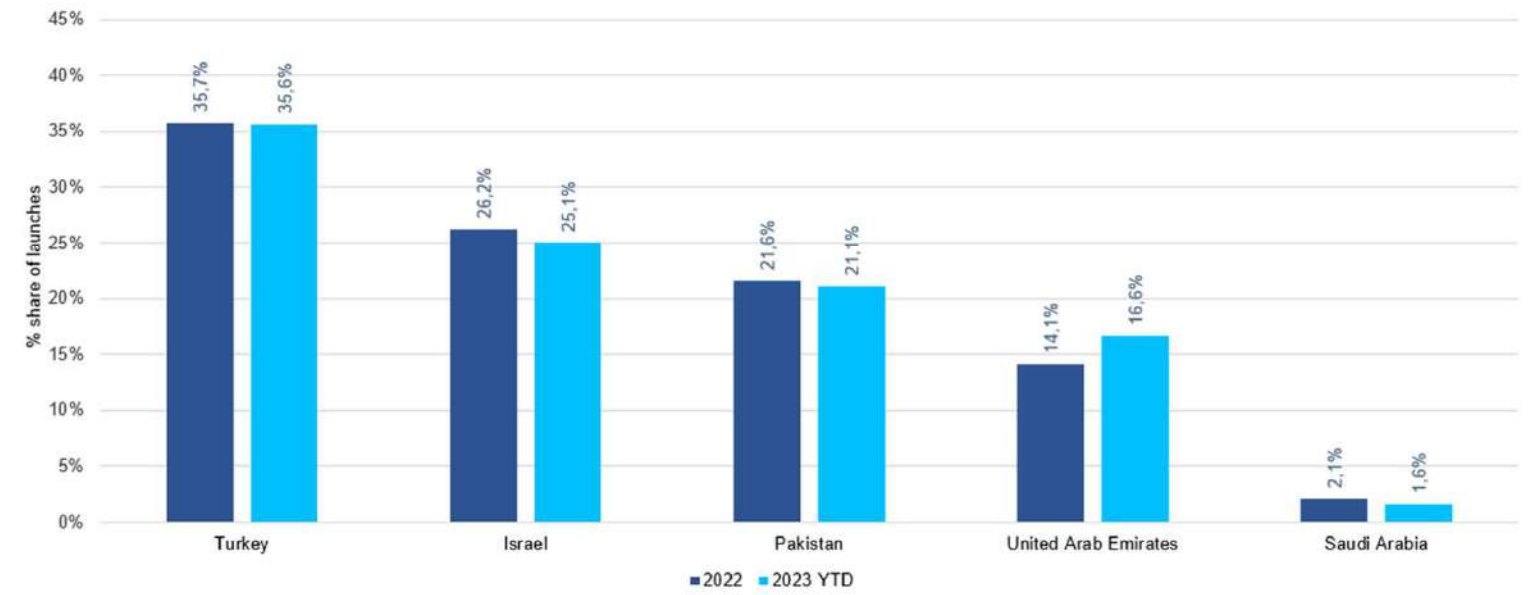


Source: Innova | Category | Genius F&B

Chart Section

Supplements – United Arab Emirates

Figure 2 | KEY COUNTRIES
(SUPPLEMENTS, 2022 - 2023 YTD)



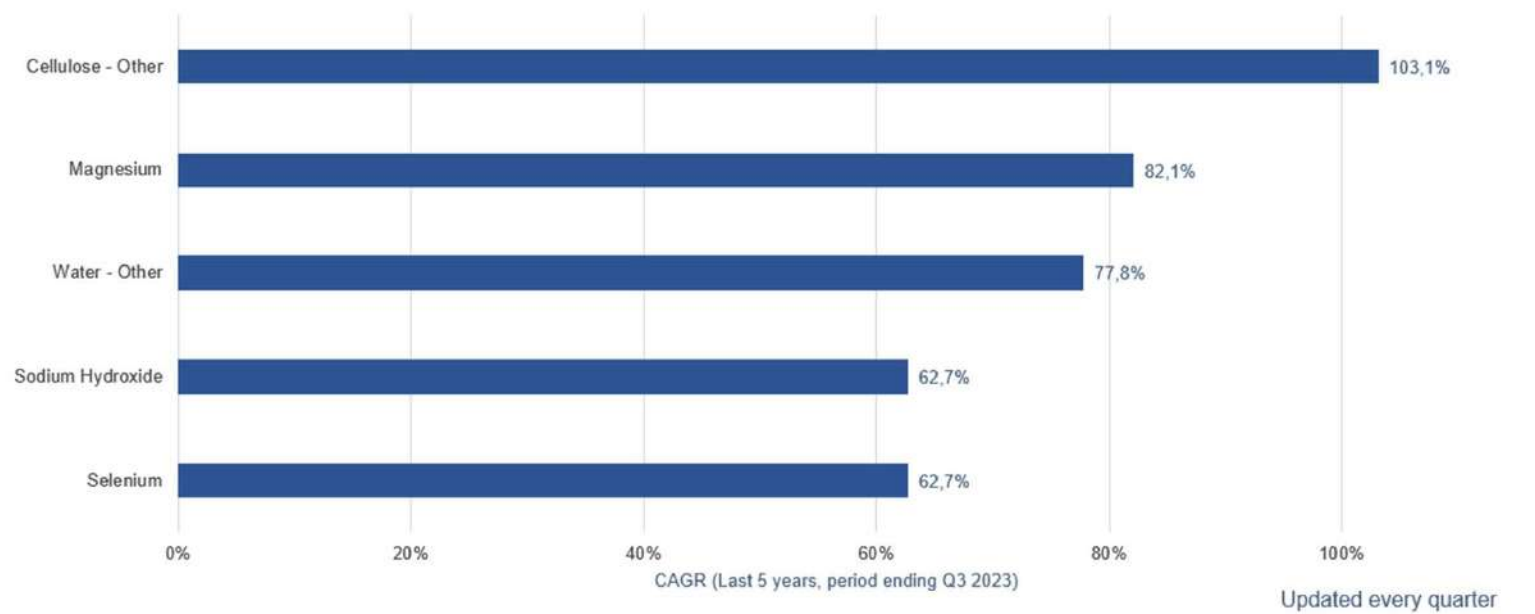
Source: Innova | Category | Genius F&B

12 ● INNOVA MARKET INSIGHTS

Chart Section

Supplements – United Arab Emirates

Figure 7 | FASTEST GROWING INGREDIENTS
(SUPPLEMENTS - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



Source: Innova | Category | Genius F&B

17 ● INNOVA MARKET INSIGHTS



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INTERNATIONAL



Chart Section

Supplements – United Arab Emirates

Figure 3 | KEY ACTIVE LAUNCHERS - COMPANIES
(SUPPLEMENTS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

| 2022 | 2023 YTD |
|------------------------------------|-----------------------------------|
| Health And Happiness Group (62.5%) | Unite Trading (65.9%) |
| Laperva (20.0%) | Laperva (17.1%) |
| Deva Nutrition (10.0%) | Rite Trading (7.3%) |
| Fade General Trading (5.0%) | Health And Happiness Group (4.9%) |
| Korea Ginseng (2.5%) | Cymbiotika (2.4%) |

Source: Innova | Category | Genius F&B

Chart Section

Supplements – United Arab Emirates

Figure 4 | KEY ACTIVE LAUNCHERS - BRANDS
(SUPPLEMENTS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)

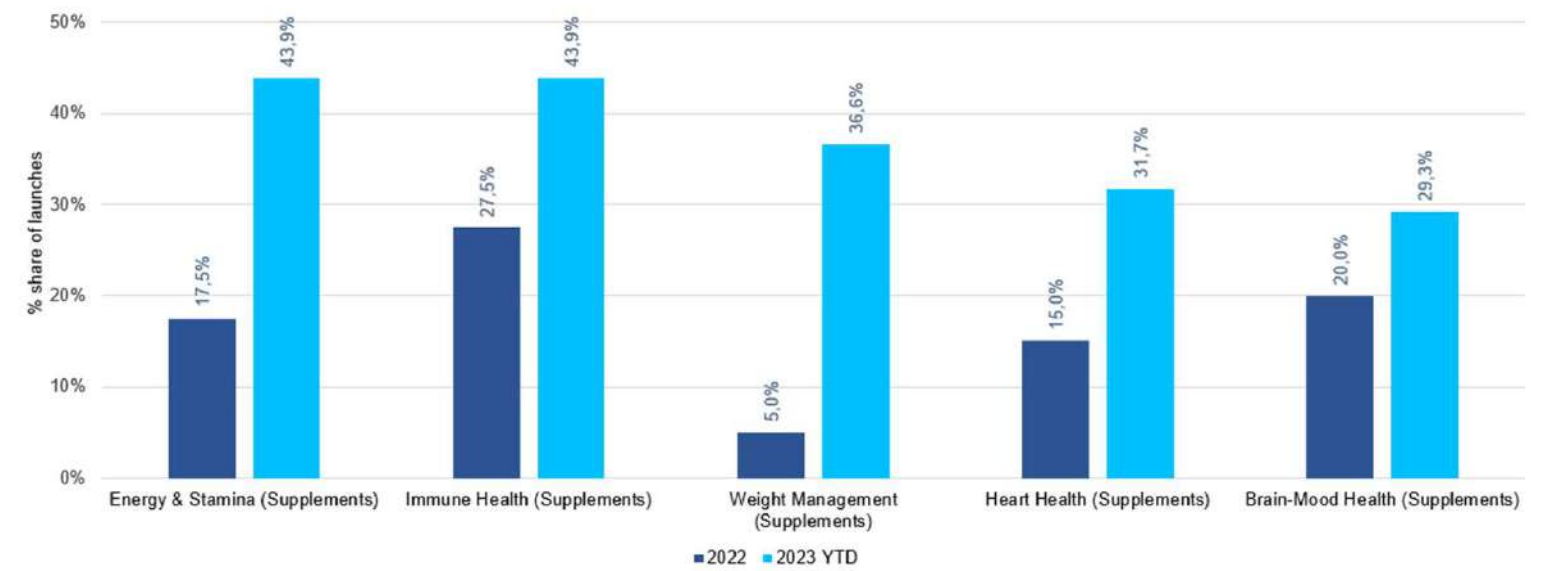
| 2022 | 2023 YTD |
|-------------------------|-------------------|
| Swisse (62.5%) | Vtamino (63.4%) |
| Laperva (20.0%) | Laperva (17.1%) |
| Deva (10.0%) | Rite (7.3%) |
| Fade Fit (5.0%) | Swisse (4.9%) |
| Cheong Kwan Jang (2.5%) | Cymbiotika (2.4%) |

Source: Innova | Category | Genius F&B

Chart Section

Supplements – United Arab Emirates

Figure 5 | KEY POSITIONINGS
(SUPPLEMENTS - UNITED ARAB EMIRATES, 2022 - 2023 YTD)



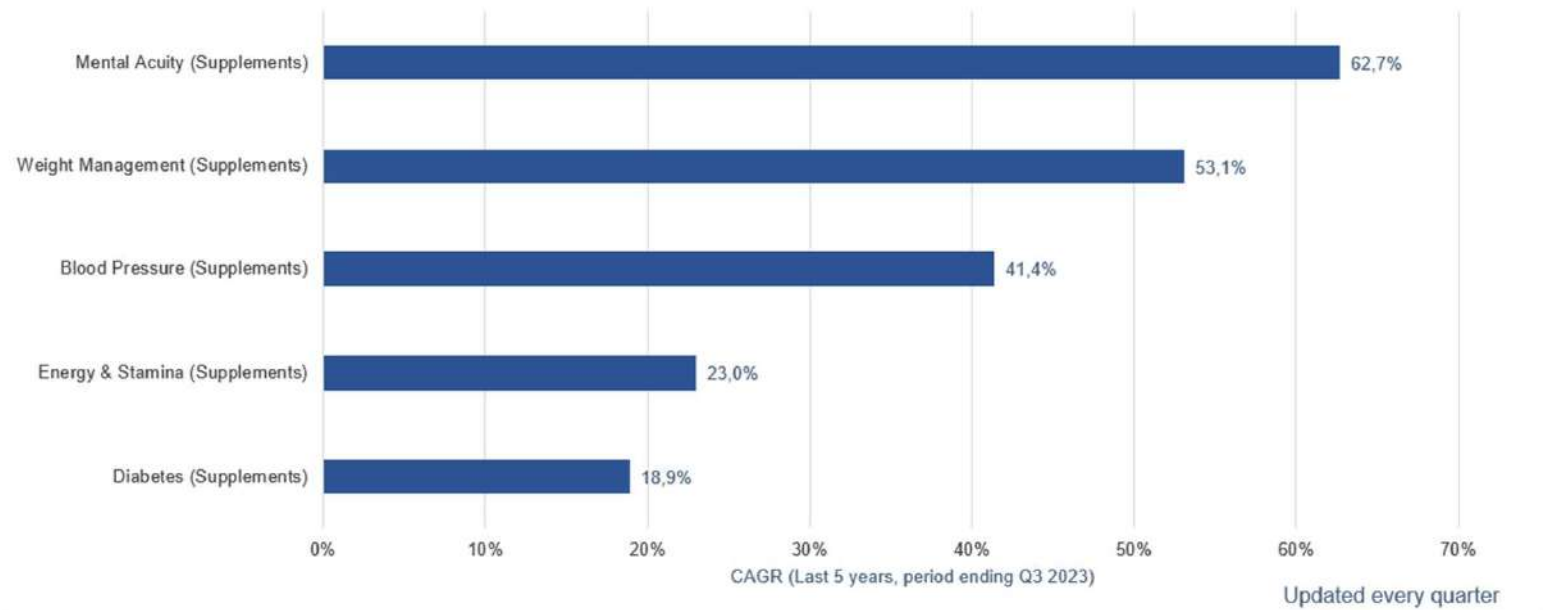
Source: Innova | Category | Genius F&B

15 ● INNOVA MARKET INSIGHTS

Chart Section

Supplements – United Arab Emirates

Figure 6 | FASTEST GROWING POSITIONINGS
(SUPPLEMENTS - UNITED ARAB EMIRATES, OCT 2018 - SEP 2023)



Source: Innova | Category | Genius F&B

16 ● INNOVA MARKET INSIGHTS



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INTERNATIONAL





Top Trends - Extended

Food & Beverage Trends Top 10 Trends for 2024



2023



INSPIRE INNOVATION
DRIVE GROWTH



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Appendix VIII Global Top 10 Trends 2024

Summary of the trends

Megatrend Drivers

Major political, economic, sociological, environmental and technological forces driving change globally

Consumer Trends

Macrotrends in consumer lifestyles, attitudes and consumption behaviour

Food & Beverage Trends

Future innovation opportunities for food and beverage: Innova's annual Top 10 Trends

Uncertainty and Volatility



Pursuit of Health & Happiness



The Transformation Age



A Sustainable Future



Value of Connection



Home-centric Living



Savvy Shopping



Healthcare to Self-care



Wholesome Enjoyment



Taking the Spotlight



Nurturing Nature



Prioritizing Prevention



The Rise of Applied Offerings



Local goes Global



Home Kitchen Heroes



Indulging in Health



Oceans of Possibilities



Quenching the Future



Minimizing the Noise



Source: Innova Database

3

Megatrend drivers – challenging dynamics

Megatrends



HEALTH OF THE PLANET

#1 global issue of concern for consumers

HEALTH OF THE POPULATION

#2 global issue of concern

COST-OF-LIVING CRISIS

3 in 4 consumers are concerned

TECH TRANSFORMATION

Impacts for how we live, work, shop and entertain

3 in 5



Consumers, globally, say they are making lifestyle changes due to global issues of concern.

Source: Innova Lifestyle & Attitudes Survey 2023

Note: Qs: Which of these global issues concern you most? To what extent are you concerned about the following "crises"/issues and their impact in your country/community? To what extent have you changed your lifestyle in response to these issues?

4



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the European Union



4 Consumer Trends frame our Top 10 F&B Trends



Healthcare to Self-care

More focus on prevention and openness to complementary solutions

Consumer Trends



Wholesome Enjoyment

Health and pleasure have become more intertwined

Consumer Trends



Home-Centric Living

New occasions and needs are opening-up in the home

Consumer Trends



Value of connection

The value of close connections with family, friends and community

Consumer Trends

Source: Innova Market Insights

Consumer Trends

5

Top 10 Trends for 2024: Overview



1. Ingredients: Taking the Spotlight

Feed into positive consumer attitudes toward key ingredients by promoting a product's star element.



2. Nurturing Nature

Business responsibilities go beyond sustainability, requiring actions that make a positive difference to nature protection.



3. Prioritizing Prevention

Positive action to prevent health concerns before they arise is driving consumers to products that meet their personal well-being needs.



4. Plant-Based: The Rise of Applied Offerings

Adapting well-known dishes and formats offers familiarity and clarity to consumers who are keen to embrace plant-based products.



5. Local goes Global

From authentic, adventurous foreign dishes to ingredients produced close to home, the power of local is spreading across the globe.



6. Home Kitchen Heroes

The home becomes an alternative venue for enhanced social occasions that fit changed lifestyles and budgetary realities.



7. Indulging in Health

Health brands move into indulgence while comforting treats come with added goodness, creating an ideal mash-up.



8. Oceans of Possibilities

The seas are developing into the farms of the future, providing inspiration alongside new, environmentally positive ingredient sources.



9. H2.O: Quenching the Future

Added health benefits and exciting endorsements lead the way in carving out a strong future for hydration products.



10. Minimizing the Noise

Open and straightforward communication appeals to consumers who want an escape from information overload.

Source: Innova Market Insights

6

TREND #1

Ingredients:
Taking the
Spotlight



- star ingredient
- macronutrients
- front-of-pack communication



Trend 1. Ingredients: Taking the spotlight

Feed into positive consumer attitudes toward key ingredients by promoting a product’s star element

Consumers seek value from ingredients



1 in 3

consumers, globally, say that they **ALWAYS** look at **ingredients** of interest on the product pack.



42%

of consumers, globally, say **“Protein”** is the most important ingredient.

The Future of Sweet Is Protein

United States, Jul 2023

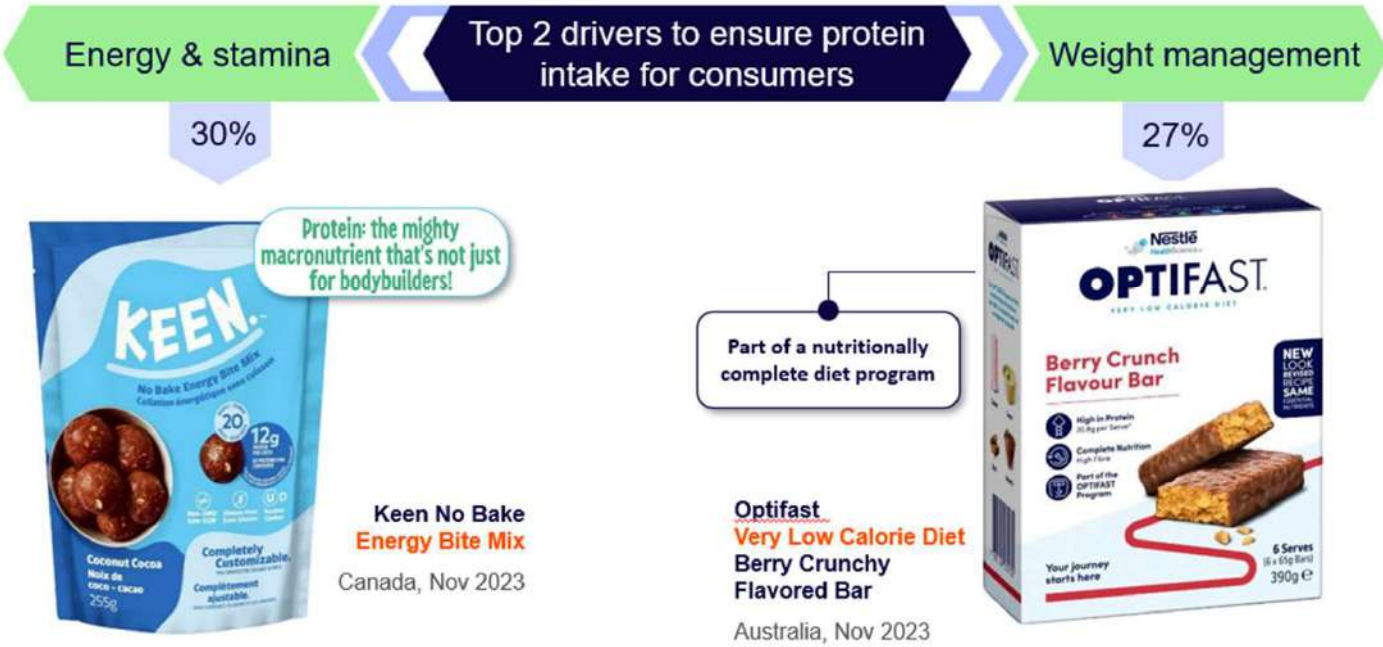
Sources: Innova Trends Survey 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database, Oobli



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Different opportunities for protein beyond muscle growth



Sources: Innova Trends Survey 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), [KeenEnergy](#), [Nestlé](#)
Note: Q: I ensure my protein intake for... (Select up to 5 out of 20 answer options)

9

Helping consumers navigate choices with storytelling & visual cues

And now some carefully chosen words about our carefully chosen ingredients.

The image shows the packaging for 'Cappello's Everything Biscuits' with the tagline 'The Greatest Story Ever Eaten.' Below the packaging, a list of ingredients is displayed: 'You're about to have a moment.' followed by 'ALMOND FLOUR', 'PASTURE RAISED EGGS', 'BUTTER', and 'OLIVE OIL'. The product is from the United States, Aug 2023.

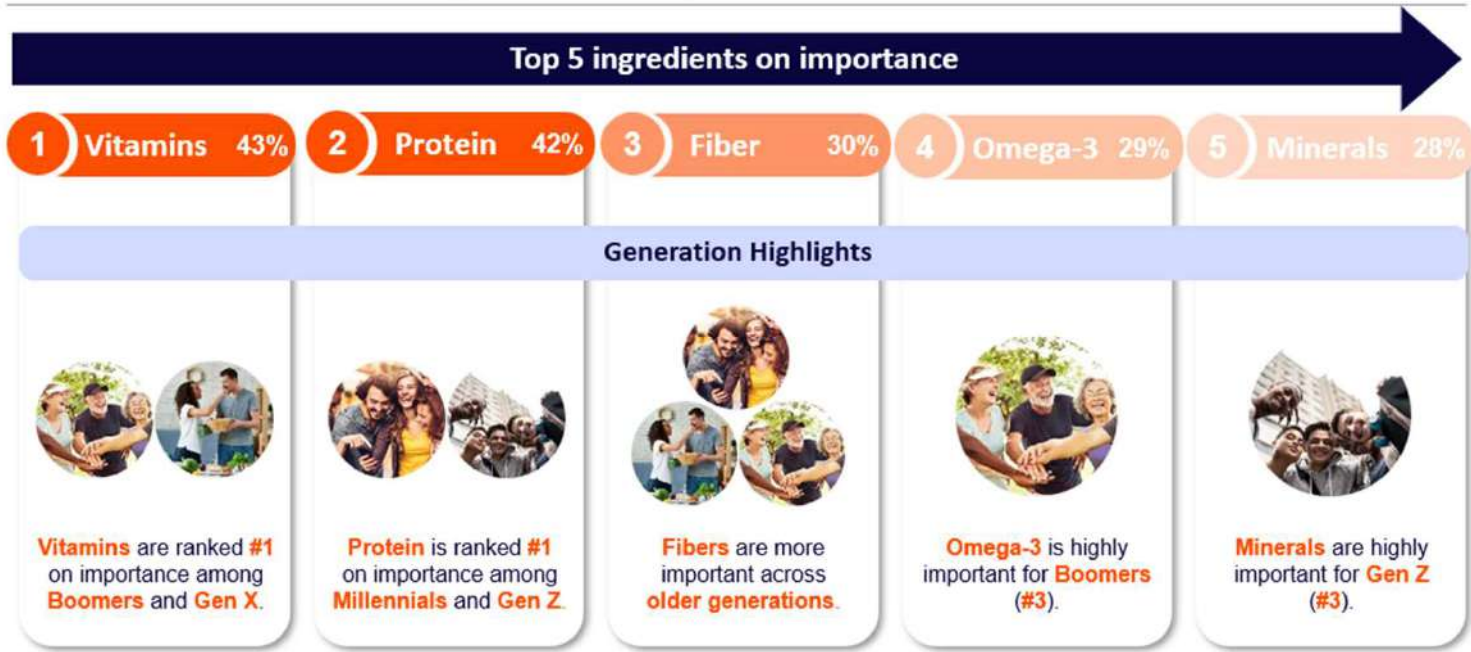
The image shows the packaging for 'Muralis Pearl Millet Cookies' with a '+17% CAGR*' badge. The tagline is 'Millet in Sweet Biscuits & Cookies'. The packaging features the text 'PEARL MILLET COOKIES' and 'let's cookie!'. The product is from India, May 2023.

The image shows the packaging for 'Green Curry Lion's Mane Mushroom' with a '+12% CAGR*' badge. The tagline is 'Mushrooms in Main Dishes'. The packaging features the text 'GREEN CURRY LION'S MANE MUSHROOM' and 'VEGAN'. The product is from Malaysia, Sep 2023.

Sources: Innova Database, [Cappello's](#)
Note: *Average annual growth in subcategory launches with selected ingredient (Global, CAGR H2 2018 vs. H1 2023)

10

Looking for the star ingredient: A generational lens



Sources: Innova Trends Survey 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US)
Note: Q: Which of the following ingredients are the most important to you? (Select up to 3 out of 13 answer options)

TREND #2

Nurturing Nature



Trend 2. Nurturing nature

Business responsibilities go beyond sustainability, requiring actions that make a positive difference to nature protection



“What would you like most to see brand/companies doing to help the environmental/social causes?”

- 1 Nature protection
- 2 Sustainable packaging
- 3 Improving waste management



United Kingdom, Aug 2023

Sources: Innova Lifestyle & Attitudes Survey 2023 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database
Note: *Forest protection-related claims include the following terms: "forest protection," "deforestation," "protecting forests," "rainforest free," "promote native plants," "protect the forests," "planting one tree," "responsible forestry," "sustainable forestry," "supporting reforestation," "sustainably managed forests"

13

Nature protection: One concept, multiple definitions

“When talking about nature protection, what comes up in your mind?”*



Sources: Innova Trends Survey 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US)
Note: *Repondents can select all that apply out of 12, **Q: Which of the following nature-related claims in food and beverages are you looking for? (Select all that apply out of 13)

14

Agrobiodiversity: Crop diversification for planetary health & food security




Nurturing nature 4.0: The role of technology

food ingredients 1st

10 Aug 2023

Cargill

Cargill is bolstering its efforts to protect forests by leveraging **satellite-powered risk monitoring capabilities** across its soy, palm oil and cocoa supply chains. The food corporation will utilize **Satelligence's AI-based solutions** to boost its progress toward deforestation-free supply chains by 2030.



Cargill harnesses **AI-enhanced satellite monitoring** for anti-deforestation supply chains

Top 5 innovative farming practices with increasing positive perception among consumers, globally (2023 vs. 2024)

1 Bioengineering

2 Satellite imaging

3 Vertical farming

4 Regenerative farming

5 Cell culture technology

+4%

+2%

Sources: Innova Trends Survey 2023 & 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Food Ingredients First, Cargill

Notes: Q: Which of the following innovative farming practice do you have the most positive perception of? (Select up to 5 out of 14)

17


TREND #3

Prioritizing Prevention



Trend 3. Prioritizing prevention

Positive action to prevent health concerns before they arise is driving consumers to products meeting their personal well-being needs




More than 1 in 3 consumers claim to be “**proactive**” in preventing health issues.

“What are your major concerns related to your physical health?”*


1

Weight management



2


Heart health



3

Bone and joint health







Helps in weight management



Improves heart health

India, Aug 2023

peanut butter with a twist

Sources: Innova Trends Survey 2024 and Innova Health & Nutrition Survey 2023 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), BeeZa
Note: *Repondents can select up to 5 answer options


19

Different generations, different health concerns


“What are your major concerns related to your physical health?”* – Top 5 per generation:



Boomers



Heart health




Weight management



Bone or joint health




Healthy aging



Brain health



Gen X



Weight management




Heart health



Bone or joint health




Healthy aging




Immune health



Millennials



Weight management




Heart health



Energy & stamina



Skin health




Immune health




Gen Z




Weight management




Skin health



Heart health




Energy & stamina




Immune health


Sources: Innova Trends Survey 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US)
Note: *Repondents can select up to 5 out of 15

20



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73

Healthy aging: A new era for holistic well-being



More than 1 in 3 consumers, globally, say that **weight management** and observing a **balanced diet** are the most important steps taken for **healthy aging**.



United States,
Sep 2023



Sources: Innova Health & Nutrition Survey 2023 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Pitaya Foods

21

Healthy aging: Younger generations over-indexed on preserving appearance

Keeping an active mind and **staying active physically** are key aspects across generations*



over-indexed** on
Keeping an active mind



Vitamin A
Help Healthy Growth & Anti Aging

Vitamin K2
Supports Heart & Brain Functions

India, Sep 2023



over-indexed** on
Preserving looks/appearance



United States (Imported
from Canada), Oct 2023

Source: Innova Health and Nutrition Survey 2023 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database, Blender Bites

Note: *Q: Which aspects of healthy aging are most important to you? (Select up to 3). **Based on target group TGI (TGI = % of a target group who selected answer/% of a total respondents who selected answer x 100)

Top Trends: Top 10 Trends 2024 - Dec 2023

22

TREND #4

Plant-Based:
The Rise of
Applied Offerings



Trend 4. Plant-based: The rise of applied offerings

Adapting well-known dishes and formats offers familiarity and clarity to consumers who are keen to embrace plant-based products



2023

2024

- | | | | |
|---|-----------------------------------|---|-----------------------------------|
| 1 | It is healthier. | 1 | It is healthier. |
| 2 | It is better for the environment. | 2 | It brings variety to my diet. |
| 3 | It brings variety to my diet. | 3 | It is better for the environment. |



Limited-edition stuffed roast chicken – the ideal Sunday roast centerpiece



United Kingdom, Sep 2023

Sources: Innova Trends Survey 2024 and 2023 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), [This](#)
Note: *Repondents can select up to 3 answer options

Convenient formats are the next step in the evolution of plant-based offerings

“Which of the following plant-based versions of **food formats** are you willing to try for meat/poultry?”*

- 1

Finger foods
- 2

Fried
- 3

Ready meals
- 4

Toppings
- 5

Snacks

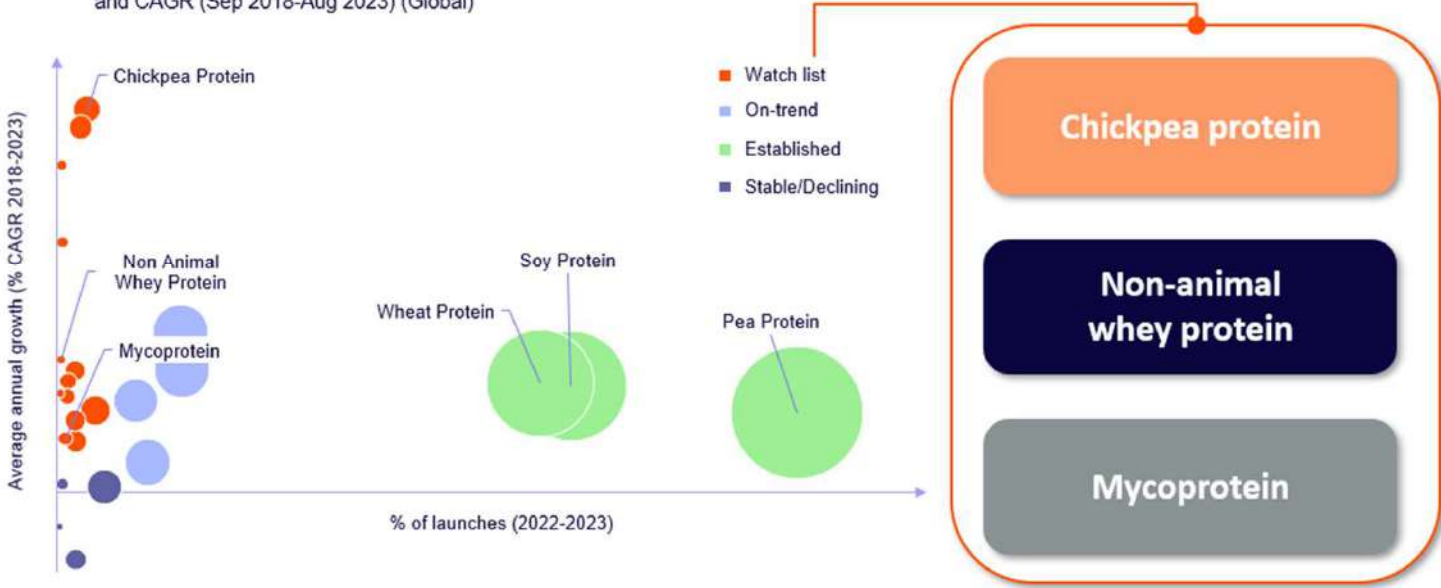


Sources: Innova Trends Survey 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database, Thai Plant Based Food Co.
Note: *Repondents can select up to 5 answer options. Growth numbers represent average annual growth in subcategory launches with a plant-based and/or vegan claim
Top Trends: Top 10 Trends 2024 - Dec 2023

25

What’s on the horizon for alternative proteins?

Figure: Alternative proteins as a % of F&B launches with a plant-based and/or vegan claim tracked with alternative protein* (Sep 2022-Aug 2023) and CAGR (Sep 2018-Aug 2023) (Global)



Source: Innova Database
Notes: *Food and beverage launches excl. supplements, clinical nutrition, pet food, sports nutrition. Selected alternative proteins: cultured-& microbial based proteins and plant-based proteins

26

Mycoprotein shaping opportunities for taste & texture improvement in the plant-based space

+13%

Mycoprotein*
(Global, CAGR Sep 2018-Aug 2023)



United Kingdom, Apr 2023

Harnessing Ginkgo Bioworks' strain optimization platform to enhance "meatiness" of mycoprotein

03 Oct 2023




food ingredients 1st
Nosh.bio, a company that develops highly functional ingredients from fungal biomass for animal-free food products, **will use Ginkgo Strain Optimization Services** to screen for protein-producing fungi strains with superior sensorial profiles.

Sources: Innova Database, Quorn, Food Ingredients First
Notes: *Growth numbers represent average annual growth in food and beverage launches excl. supplements, clinical nutrition, pet food, sports nutrition with a plant-based and/or vegan claim

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Plant-based goes global: Adapting to world cuisines


START A NEW TRADITION.




Tofurky Italian Style Plant Based Deli Slices
United States, Sep 2023

Top Cuisines for which consumers would like to try plant-based versions:


European

 **Italian** 47%


Asian

 **Chinese** 44%

American

 **Mexican** 44%


"The Plant-it Food Co.'s recipes are inspired by flavors from around the world."



The Plant-It Food Co. Mexican Style Chilli Burrito Bowl
Ireland, Apr 2023

Trend #5

Local goes global



Sources: Innova Trends Survey 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database, Tofurky, The Plant-It Food Co.
Notes: Q: For which of the following Asian/European/American cuisines would you like to try their plant-based versions? (Select all that apply)

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TREND #5

Local Goes Global



Trend 5. Local goes global

From authentic, adventurous foreign dishes to ingredients produced close to home, the power of local is spreading across the globe



2 in 3 consumers, globally, say “I am open to trying new global cuisines.”

African (+13% CAGR)*

France, Mar 2023



Made with French chicken and beef

Moroccan-style couscous

East Asian (+5% CAGR)*



United Kingdom, Aug 2023

Gochujang-style cooked beef

Sources: Innova Flavor Survey 2023 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US)
Note: *Growth seen for all F&B featuring African and East Asian flavors (CAGR, Global, H2 2018 vs. H1 2023)

National pride reflected in consumers' F&B choices



More than half of consumers, globally, say "I actively look out for the claims/labels of locally sourced ingredients."

- "To what extent are the following values important to you in your diet?"*
- 1 Honesty/transparency of ingredients
 - 2 Equality
 - 3 Sharing food with family/friends
 - 4 National pride

United States, Aug 2023

Australia, Aug 2023

Sources: Innova Lifestyle & Attitudes Survey 2023 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Trends Survey 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Database
Note: *The ranking is based on the answer options with highest percentages of "very important" + "extremely important"

Local production to ease availability of global taste



Almost 2 in 3 consumers, globally, say "Local communities will have to become more self-sufficient."

WASABI FROM AUSTRIA



food ingredients 1st
01 Sep 2023
Arla backs Indonesian dairy development project to launch first-ever locally-produced organic cheese

"PhytomiQ has succeeded in producing sustainable, top-quality wasabi grown from their indoor farm in Austria."

Sources: Innova Lifestyle & Attitudes Survey 2023 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), PhytomiQ, Food Ingredients First

Local goes global through social media



Almost 1 in 2 of young consumers say “I am increasingly looking for cuisines from other countries.”

Yogiyo Hot And Fiery Korean Chili Sauce

Netherlands, Nov 2023



TikTok #koreanfood 24.1B views



29 Sep 2023

From Florence to US, exporting the authentic “schacciata” sandwich. A successful story kick-started by social media.

All’Antico Vinaio



allanticovinaiofirenze

3,060 posts 763K followers

Source: Innova Flavor Survey 2023 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Yogiyo, Eater

TREND #6

Home Kitchen Heroes

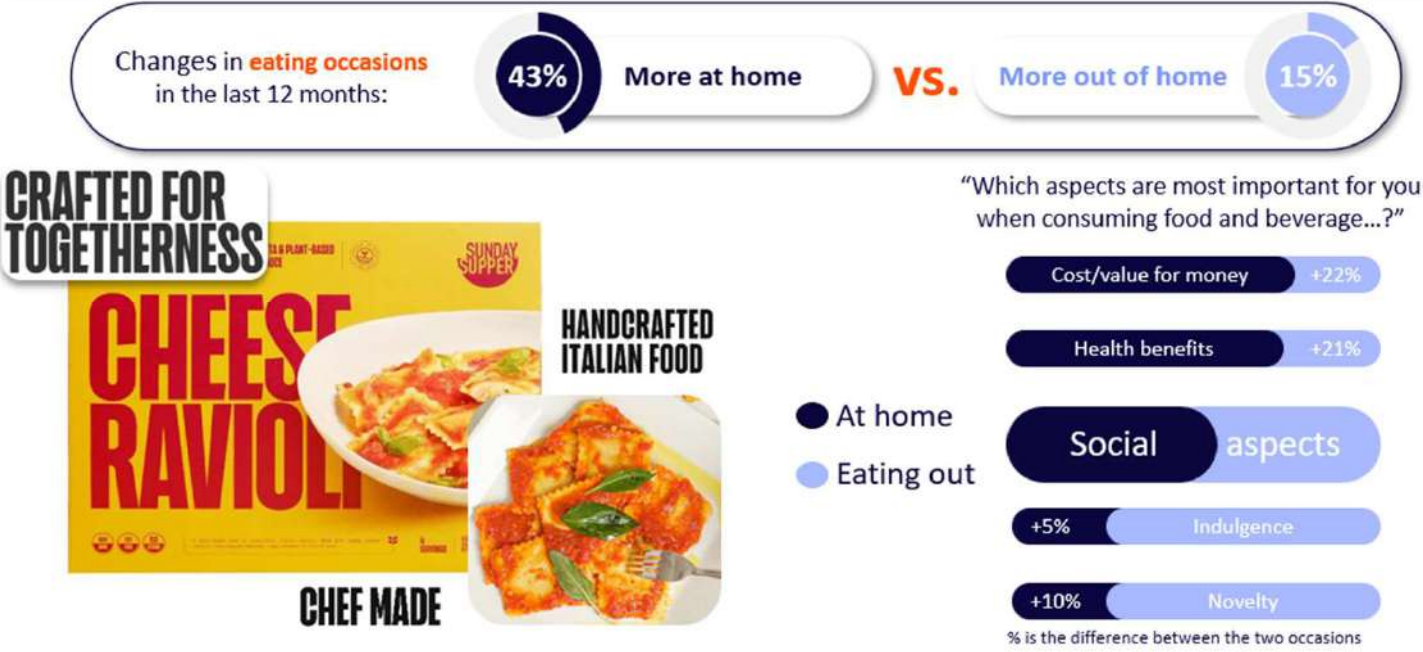


Funded by the European Union



Trend 6. Home kitchen heroes

The home becomes an alternative venue for enhanced social occasions that fit changed lifestyles and budgetary realities



Sources: Innova Lifestyle & Attitudes Survey 2023 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Innova Trends Survey 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Sunday Supper

35

Adapting out-of-home social experiences to at-home consumption



Sources: Innova Database, Click4more, Meze Food Stories, Bubbleology

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Appendix VIII Global Top 10 Trends 2024

Cooking at home is the right moment to try something new



"Where are you most likely to experiment in terms of flavor?"

"Home cooking" is by far the **#1 choice**, with **3 in 5** consumers saying it.

Authentic recipes, delicious flavours, family owned.



Sources: Innova Flavor Survey 2023 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Mr Chen's

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Consumers seek a unique twist to enhance home cooking

From Michelin star meals...



Spain,
Oct 2023

"Pepe Rodriguez – chef at El Bohio with a Michelin star presents his own creations around the most recognized Spanish dish in the world."



Almost

1 in 4

consumers, globally, will prioritize their spending on **Special food & drink to be consumed at home** beyond living essentials.

... to tasteful ingredients

"The Spice Lab is designed to **enhance your culinary experience at home**. These Air Fryer spices are **heat resistant** due to the coating used for the salt."



Sources: Innova Lifestyle & Attitudes Survey 2023 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Paellissimo, Moquntia

Notes: Q: Considering your disposable income, where will you prioritize your spend beyond living essentials over the next 12 months? (Select all that apply out of 21)

Top Trends: Top 10 Trends 2024 - Dec 2023

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the European Union



INTERNATIONAL



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TREND #7

Indulging in Health



Trend 7. Indulging in health

Health brands move into indulgence while comforting treats come with added goodness, creating an ideal mash-up



More than half of consumers, globally, say they are **willing to compromise on indulgence for healthier food.**



With chicory root fiber



Less sugar



No
Sweeteners
Added flavorings
Added colors

Italy, Apr 2023



“In your opinion, which of the following is the best way to make indulgent food and beverage categories healthier?”

More than **1 in 3**
consumers say either



Limit/reduce
non-healthy ingredients



Use natural ingredients/less
artificial ingredients

Sources: Innova Trends Survey 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Loacker

Consumers are seeking the best of both aspects, looking for health benefits through indulgent formats

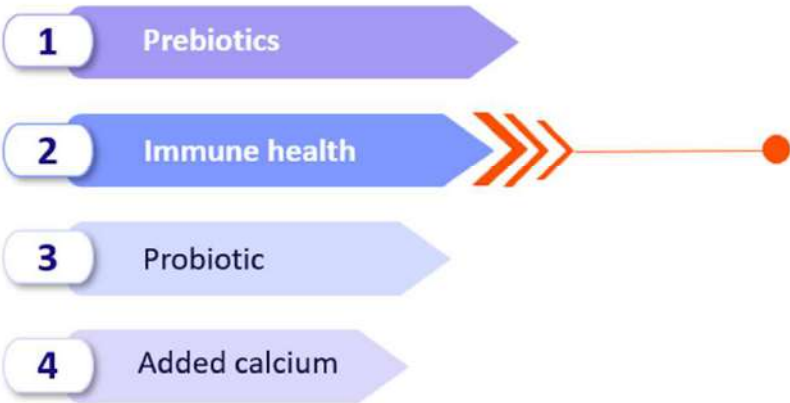


Sources: Innova Trends Survey 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Joya
Note: *Selected indulgent categories: All desserts & ice cream subcategories, bakery: bread & bread products, cakes – pastries & sweet goods, sweet biscuits & cookies, confectionery: chocolate bars, chocolate blocks, chocolate pieces – wrapped, chocolate pieces – unwrapped, other chocolate confectionery, soft drinks: juices & nectars

41

Spotlighted health claims in indulgent food

Fastest growing* active health claims for indulgent categories**:



United States, Aug 2023

Source: Innova Database, Every Daze
Note: *<50 launches in H2 2022 vs. H1 2023 are not considered. **Selected indulgent categories: All desserts & ice cream subcategories, bakery: bread & bread products, cakes – pastries & sweet goods, sweet biscuits & cookies, confectionery: chocolate bars, chocolate blocks, chocolate pieces – wrapped, chocolate pieces – unwrapped, other chocolate confectionery, soft drinks: juices & nectars

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Immune health and pre- and probiotic stand out for indulgent categories



Sources: Innova Database
Note: Selected indulgent categories: All desserts & ice cream subcategories, bakery: bread & bread products, cakes – pastries & sweet goods, sweet biscuits & cookies, confectionery: chocolate bars, chocolate blocks, chocolate pieces – wrapped, chocolate pieces – unwrapped, other chocolate confectionery, soft drinks: juices & nectars
Top Trends: Top 10 Trends 2024 - Dec 2023

Healthy indulgence is meeting the consumer craving for savory snacks



Sources: Innova Database, Innova Snacking Survey 2023 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), The Good Crisp Company
Notes: Q: For which type of snacks do you consume a healthier alternative? (Select all that apply)

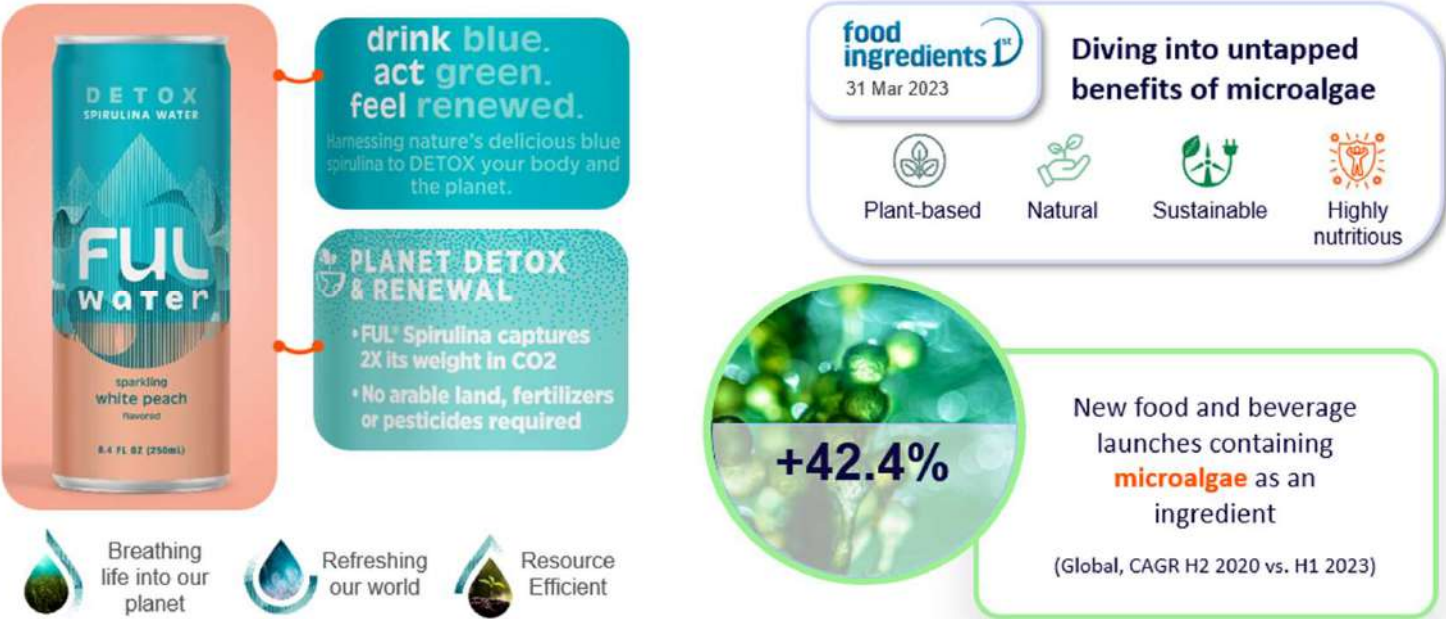
TREND #8

Oceans of Possibilities



Trend 8. Oceans of possibilities

The seas are developing into the farms of the future, providing inspiration alongside new, environmentally positive ingredient sources



Sources: Ful, Food Ingredients First

Plant-based exploring off land: Discovering algae as a flavor-enhancer

Emily Seaweed Crisps consist of seaweed coated with crispy tapioca to make an irresistible snack. No nasties, just goodness from the sea.



abakus
SEAWEED CRISPS
salt & vinegar

crunchy tapioca
gummy seaweed

CARBON NEUTRAL SINCE 2019
1% FOR THE PLANET
Certified **(B)** Corporation
VEGAN



More than **1 in 4** consumers, globally, say they are interested in **marine carbon positive resources**.*

Plnt Crab Cakes are based on wheat proteins with a **unique fish flavor** due to the **nori seaweed** used.



PNT
100% plant-based CRAB CAKES

100% PLANT-BASED KRAKENBRATLING
100% VEGETAL PASTELITOS DE CARANGUEJO
100% A BASE DE VEGETAL PASTES DE CARANGUEJO
100% نباتي كعكة الكركي

INNOVATION SHOW
Top Innovation 2023

Sources: Innova Trends Survey 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK), Plnt, Emily
Notes: Q: To what extent are you interested in marine carbon positive resources? *Only respondents that selected "extremely" and "very interested"

Seafood companies: The ocean lifeguards of the future

CRAFTING THE FUTURE OF TINNED FISH



SCOUT
SEAFOOD SNACKS
MILD YELLOWFIN TUNA IN OLIVE OIL
CHILI CRISP CRUNCH TOPPER
30 WHAT INSIDE
1.5 LBS MIX

**NATURALLY SOURCED
SOURCE DURABLE**

SeaTrees
by Sustainable Surf

CERTIFIED SUSTAINABLE SEAFOOD MSC
www.msc.org

United States, Sep 2023



12tides
ORGANIC KELP SNACKS
PUFFED KELP CHIPS
truffle & pepper
NET WT. 2 OZ (57g)

United States, May 2023



OCEAN-POSITIVE SNACKING

We're ocean lovers at heart. That's why we set out to make tasty, nutrient-dense snacks using kelp from regenerative ocean farms. Together we can turn the tide toward a better food system with healthier oceans.

REGENERATIVE OCEAN FOODS
Kelp harvesters nurture the ocean, restoring acidification and supporting biodiversity.

ZERO-INPUT OCEAN
Kelp farming requires no pesticides, no herbicides, no artificial food, and no fresh water.

NUTRIENT-RICH FOOD
Kelp is also tasty! Kelp is full of vitamins and minerals and has an umami-packed flavor.

SUPPORTS COASTAL COMMUNITIES
Our kelp is sourced directly from small-scale ocean farmers in North America.

Sources: Innova Database, Innova Trends Survey 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Scout, 12 Tides

Going beyond seafood to unlock oceans of possibilities



MARKET INTELLIGENCE
REPORT

FOOD AND BEVERAGES UAE 2024



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