

Gulfood 2019

The voice of the F&B industry

Enrico Gallorini | GRS Research & Strategy



Business intelligence
Business strategy
Buyer personas
Competitor analysis

Consultancy
Customer journey
Customer satisfaction
Data analysis

Data collection
Data mining
Market outlook
Neuromarketing

Methodology

Research

Data have been collected between Jan 6th and 26th, 2019 in a CAWI (Computer Assisted Web Interviewing) mode.

Objective

Sharing experience, providing information about the current performance of the companies they represent, sharing their personal views about the industry as a whole, as well as their expectations for the future.

The survey was carried out by GRS Research & Strategy, an international research company with offices in Dubai (UAE), London (UK), and Venice (Italy).

www.grsnet.it



1,634
senior F&B
professionals



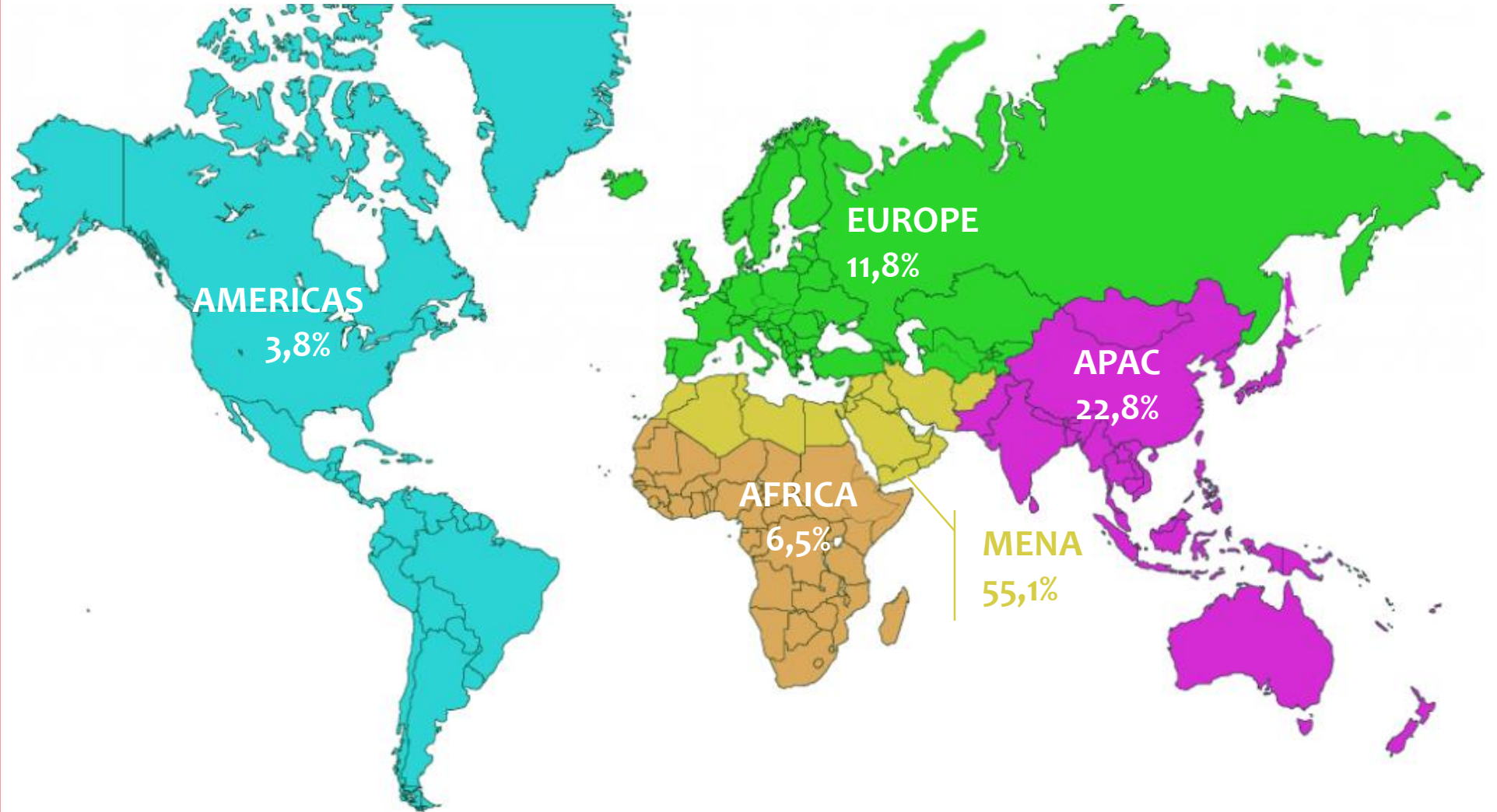
109
different countries
across the world



10
minutes survey

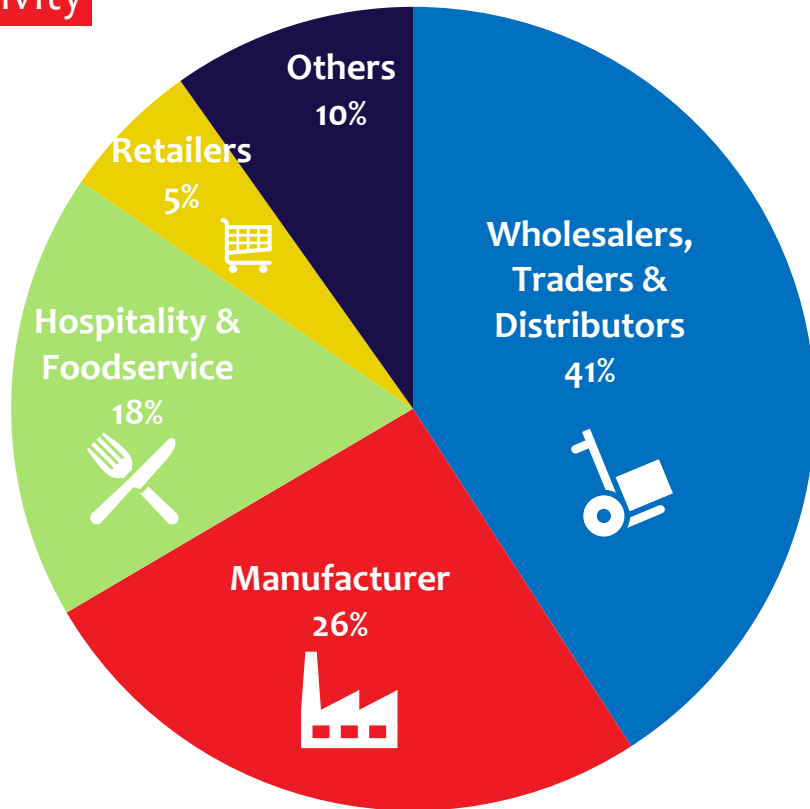
Origin of Respondents to the survey

- By Region

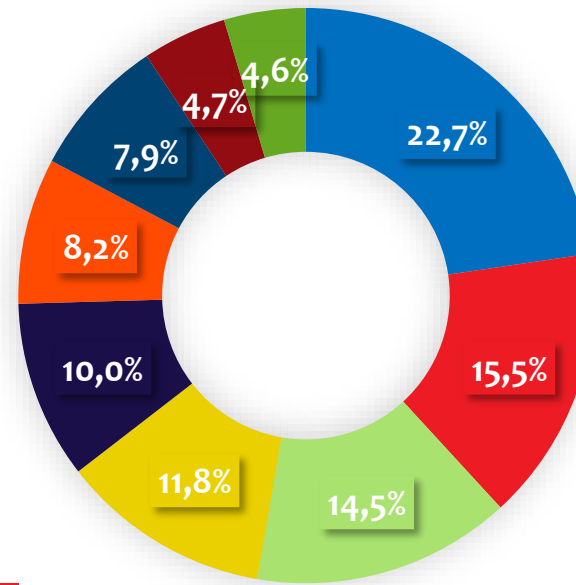


Respondents to the survey

Activity

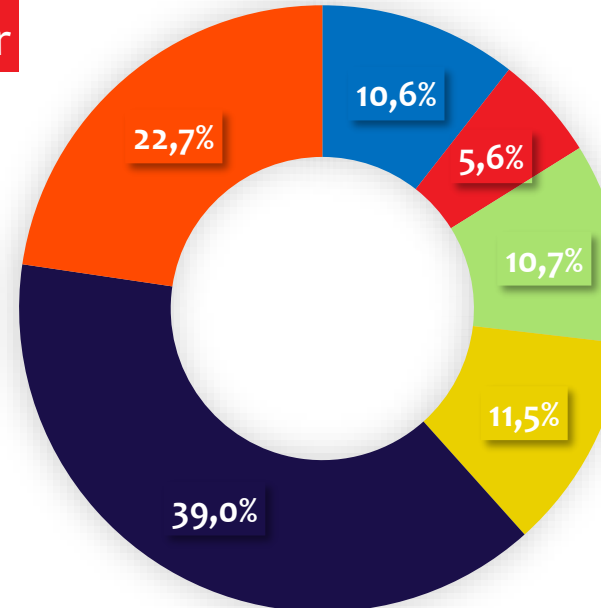


Sector



- Confectionery, Snacks & Ready-to-Eat
- Pulses, Grains & Cereals
- Beverages
- Premium, Gourmet & Fine Foods
- Ingredients
- Meat & poultry
- Dairy
- Seafood
- Fats & Oils

Annual Turnover



- 100+ Million USD
- 50-100 Million USD
- 21-50 Million USD
- 11-20 Million USD
- 1-10 Million USD
- < 1 Million USD

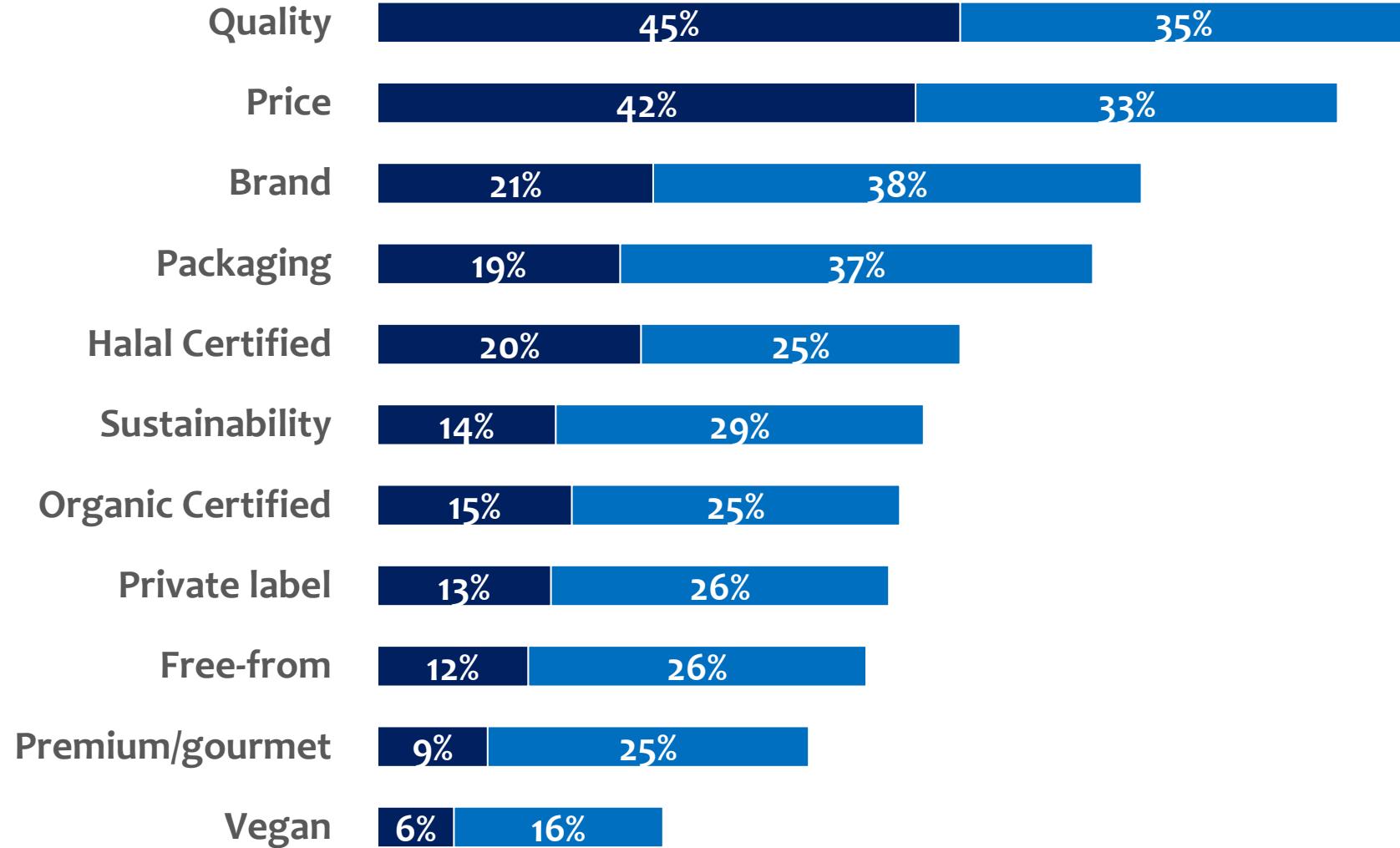
In your opinion, how much will the following **factors** impact consumer's purchasing decision in 2019?

In your opinion, how much will the following **factors** impact consumer's purchasing decision in 2019?

Consumer attention

■ Extreme impact

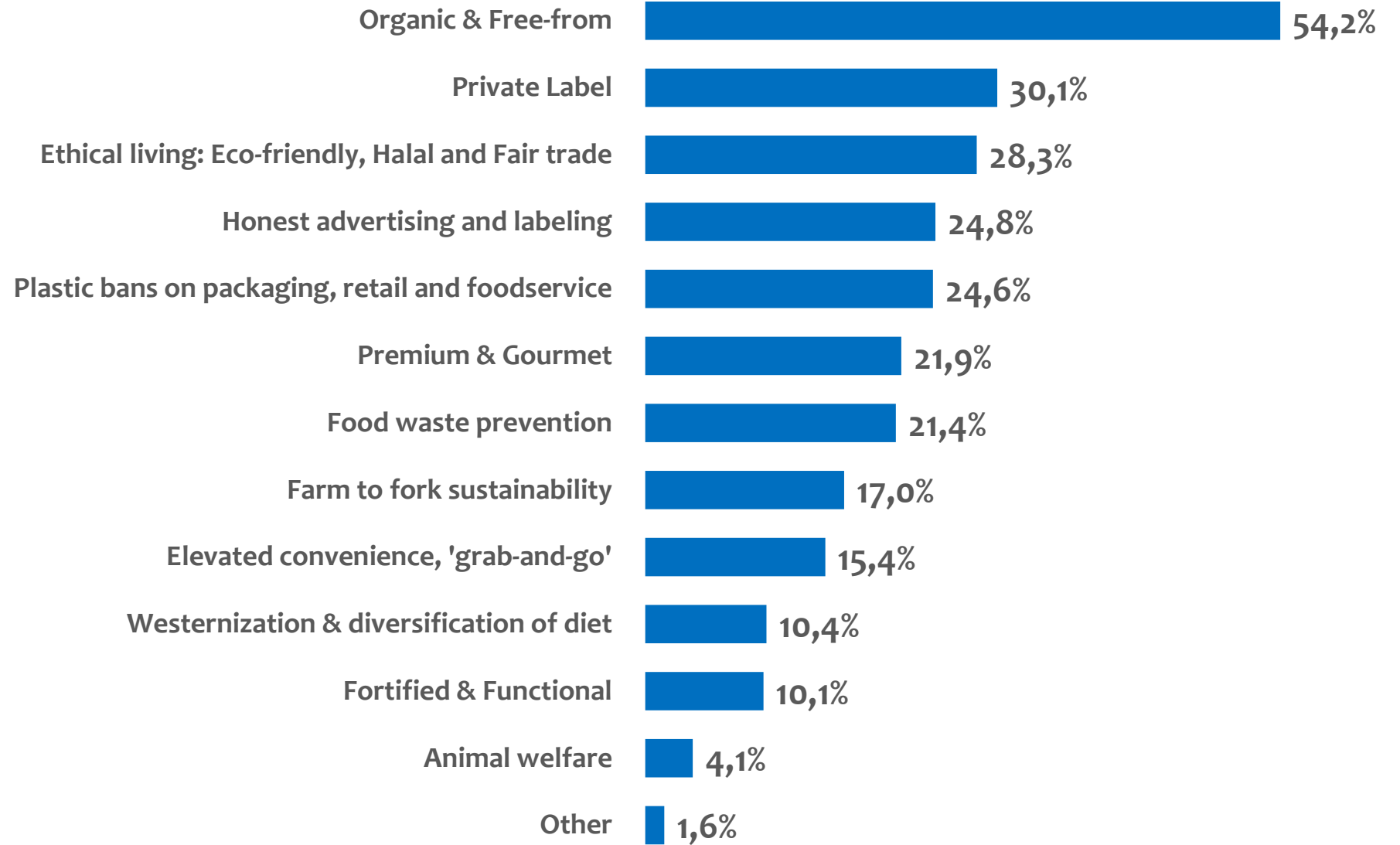
■ Significant impact



***What are the 3 most important
trends in the F&B industry?***

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3 most important
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industry?

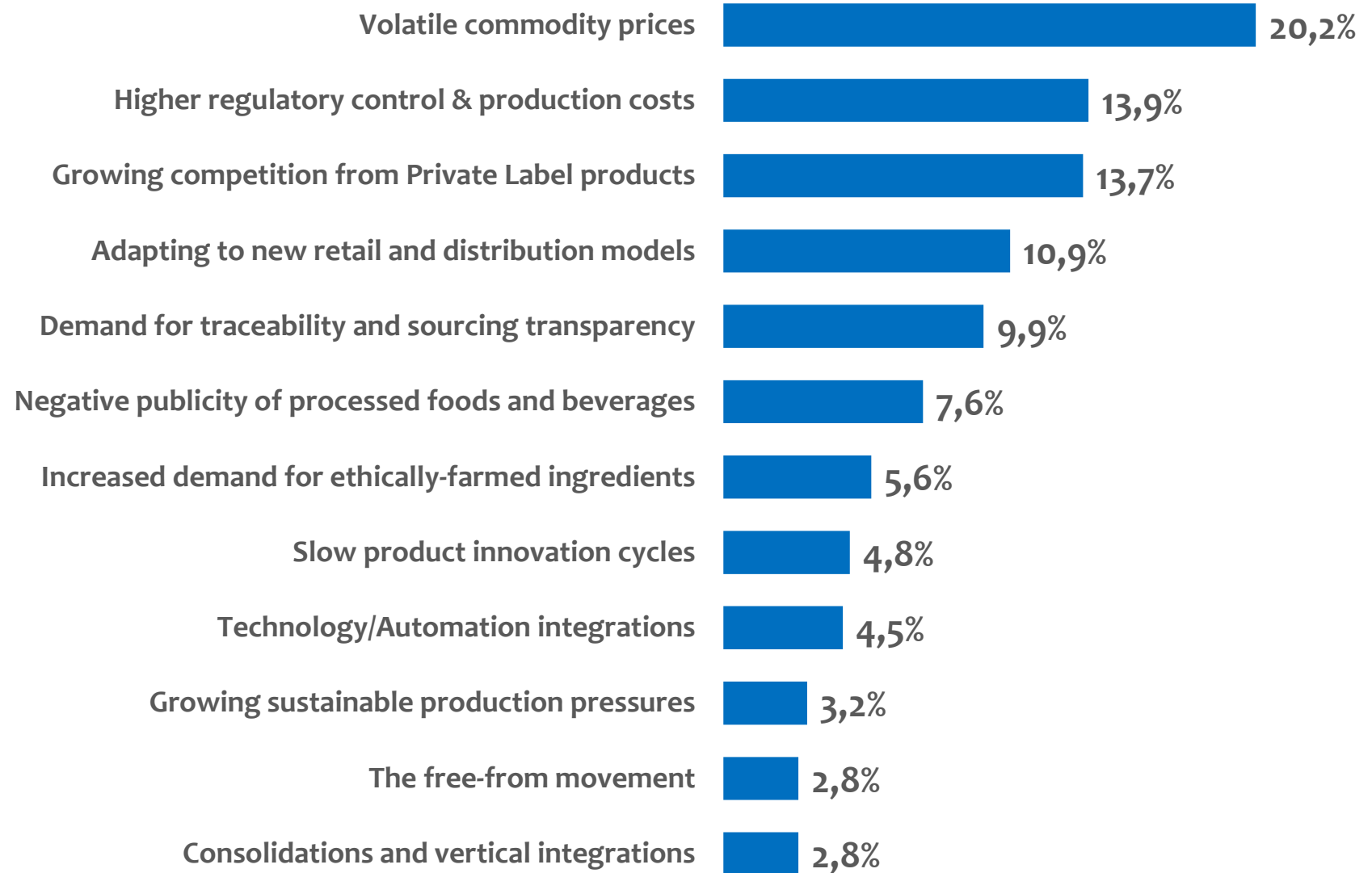
Key trends



***In your opinion, what's the main
challenge / threat for the food and
beverage industry?***

In your opinion,
what's the main
challenge / threat
for the food and
beverage
industry?

Main challenge



***In your opinion, what's the main
market opportunity?***

**In your opinion,
what's the main
market
opportunity?**

Main opportunity



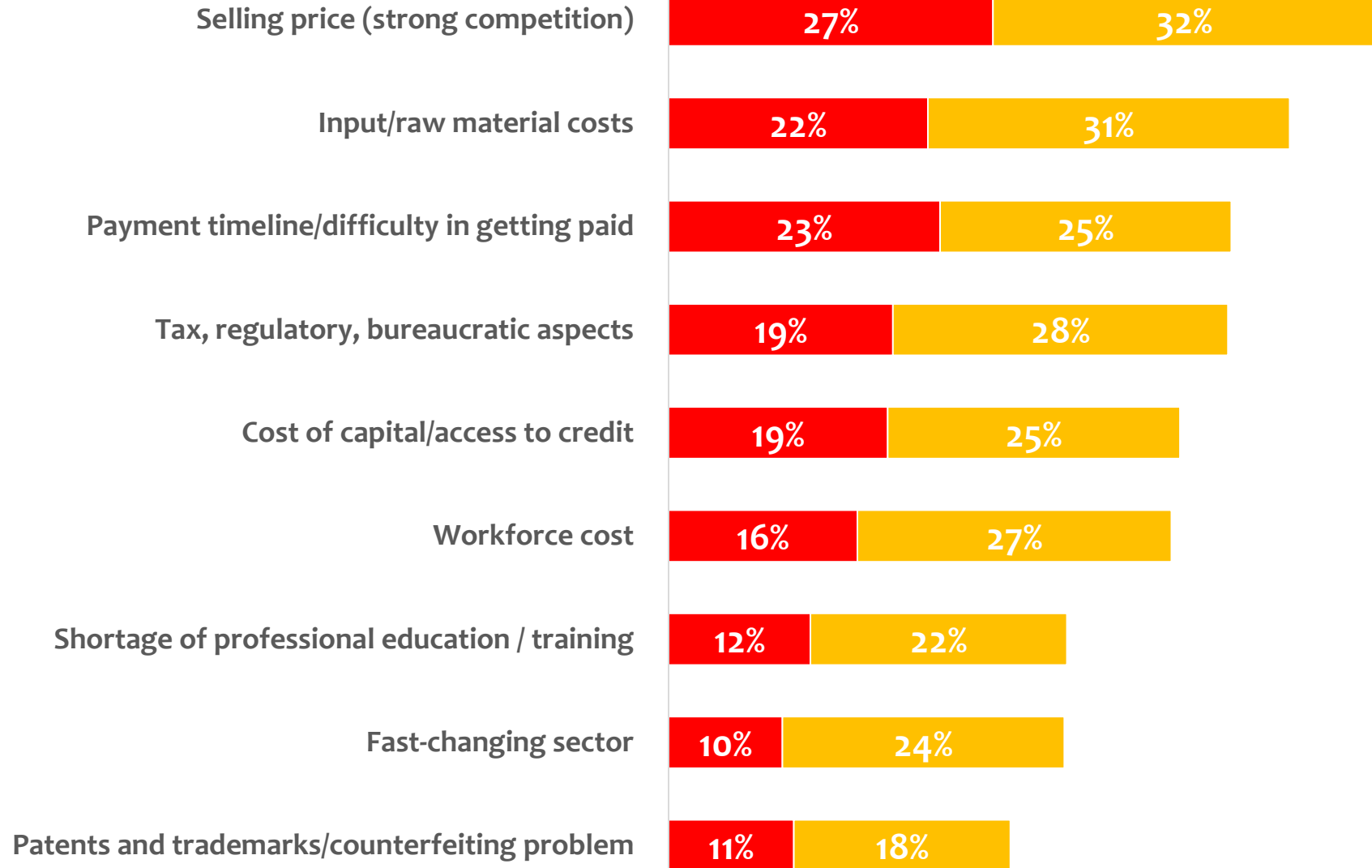
How **critical** are the following **factors**
in your company's business?

How **critical** are the following **factors** in your company's business?

Critical factor

■ Extremely critical

■ Fairly critical

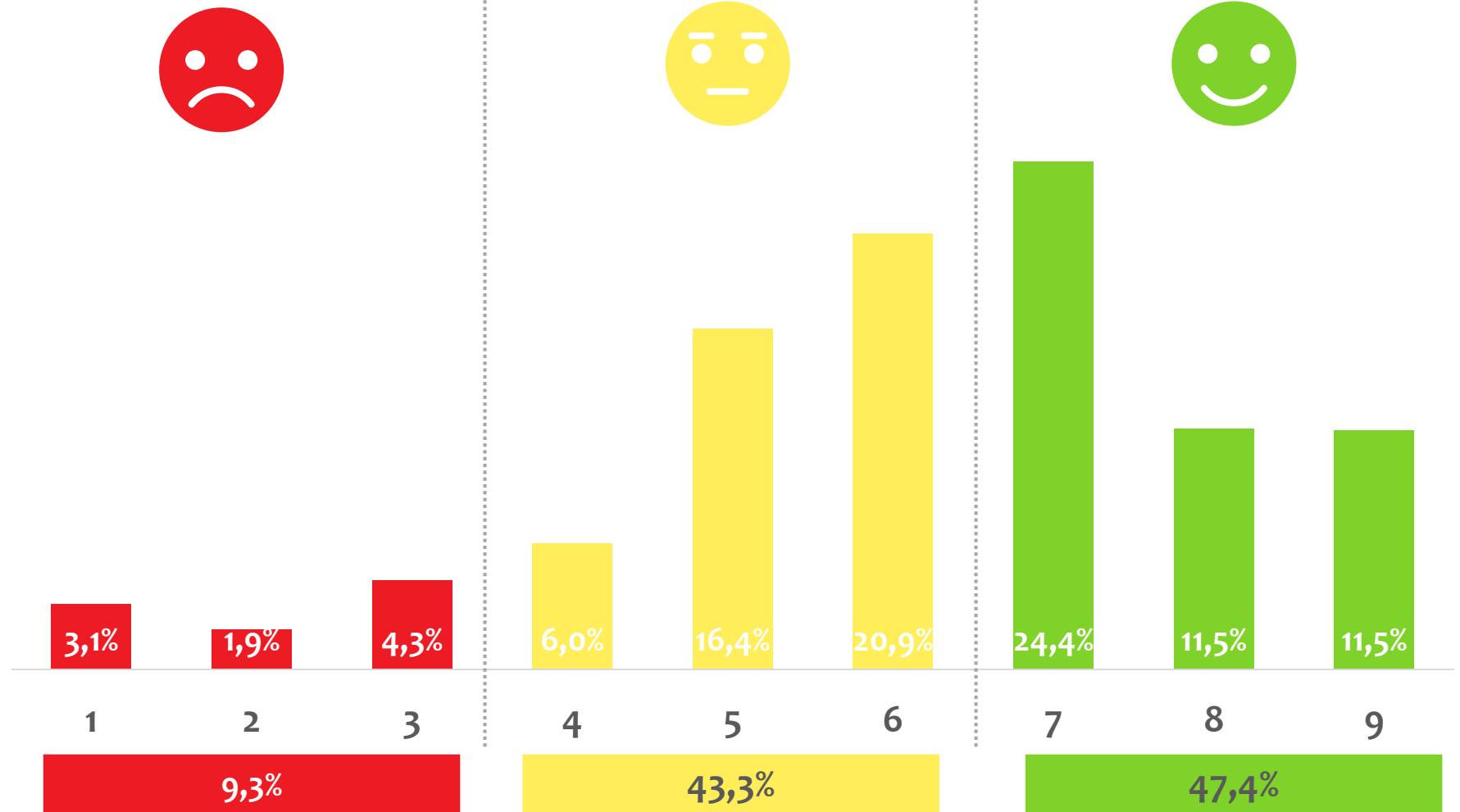


**Overall, how satisfied are you
with the **current performance**
of your company?**

Satisfaction - current performance

Average
6,2

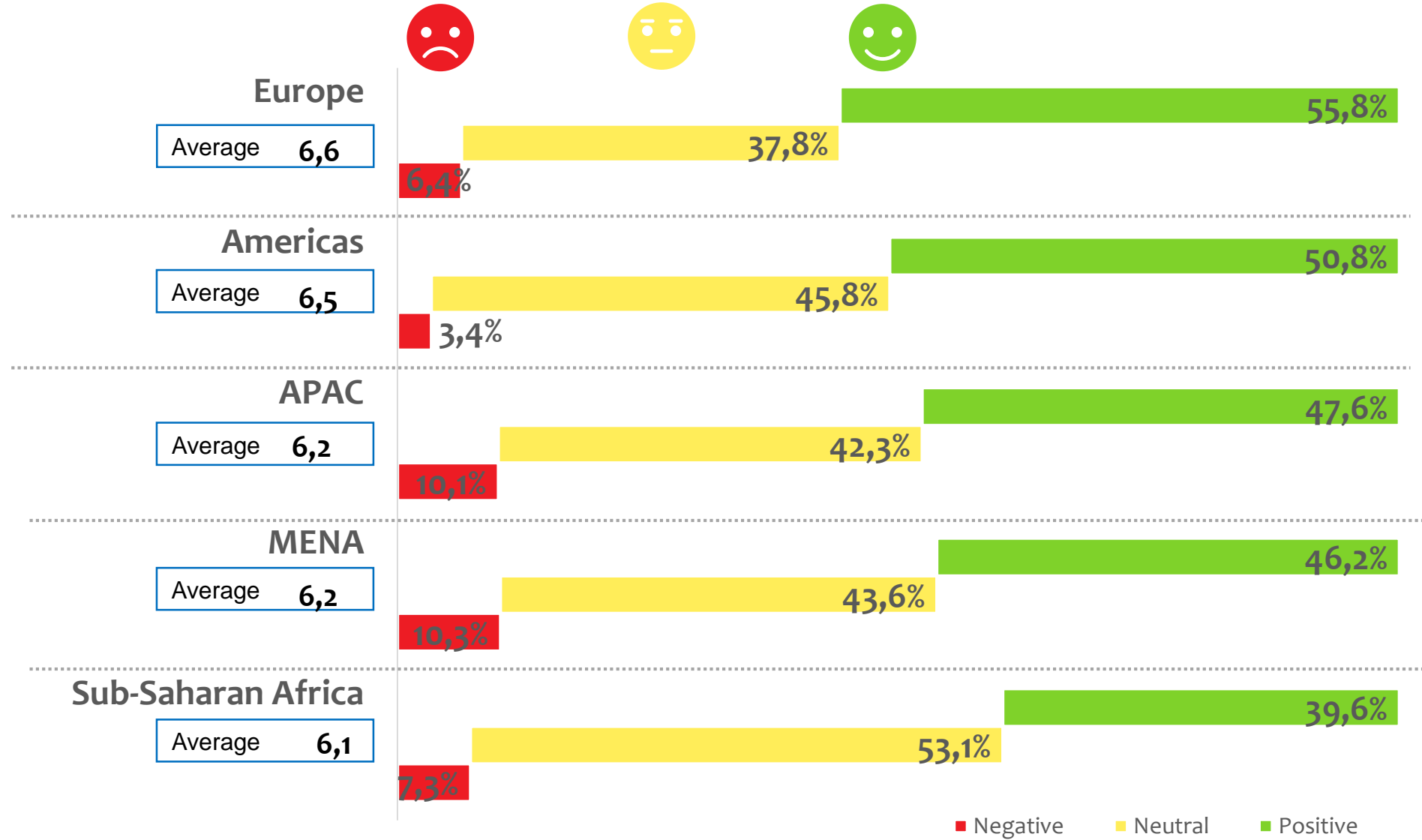
Overall, how satisfied are you with the **current performance of your company?**



Overall, how satisfied are you with the **current performance of your company?**

By **Region**

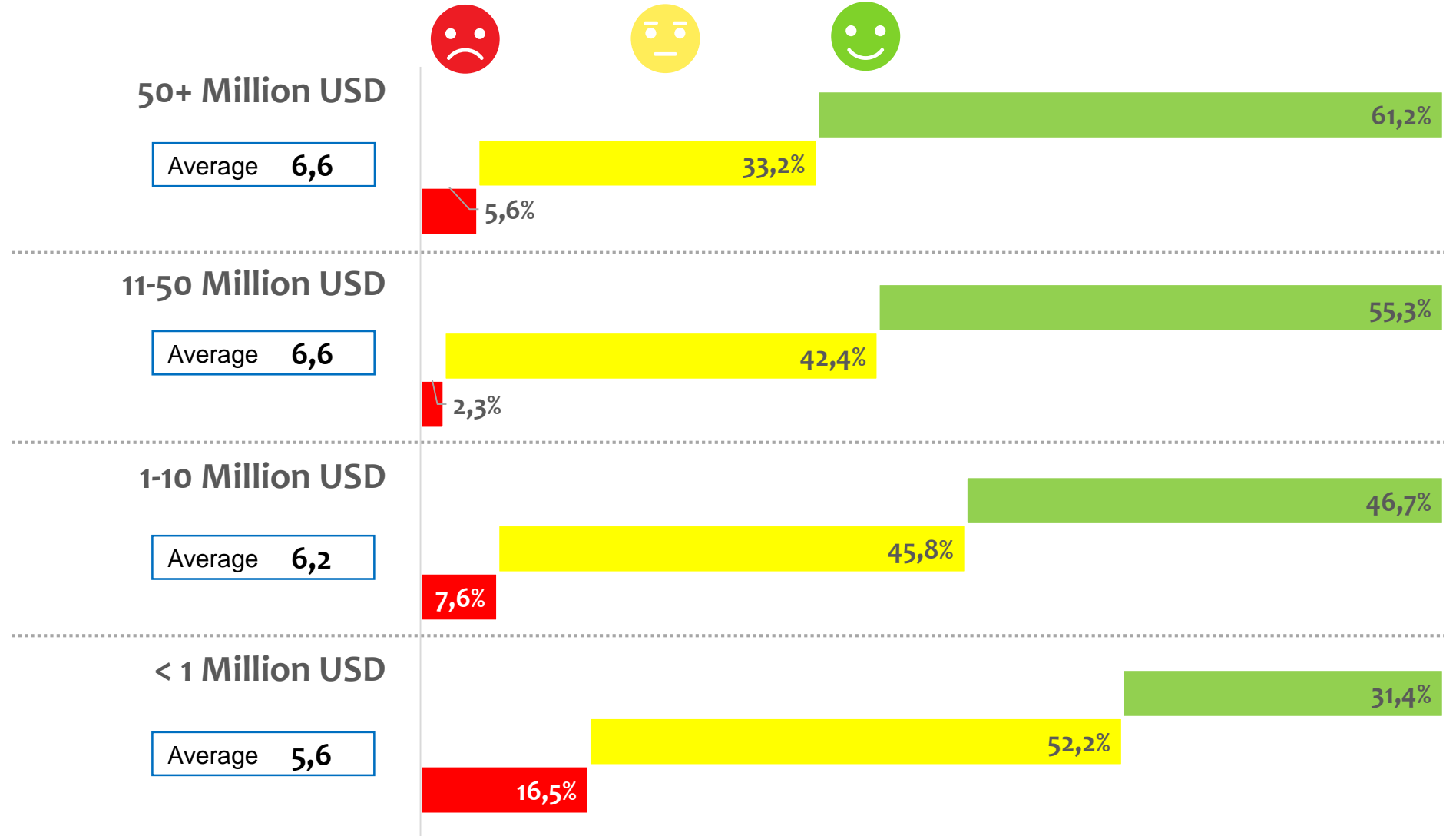
Satisfaction - current performance Vs Region



Overall, how satisfied are you with the **current performance of your company?**

By **Turnover**

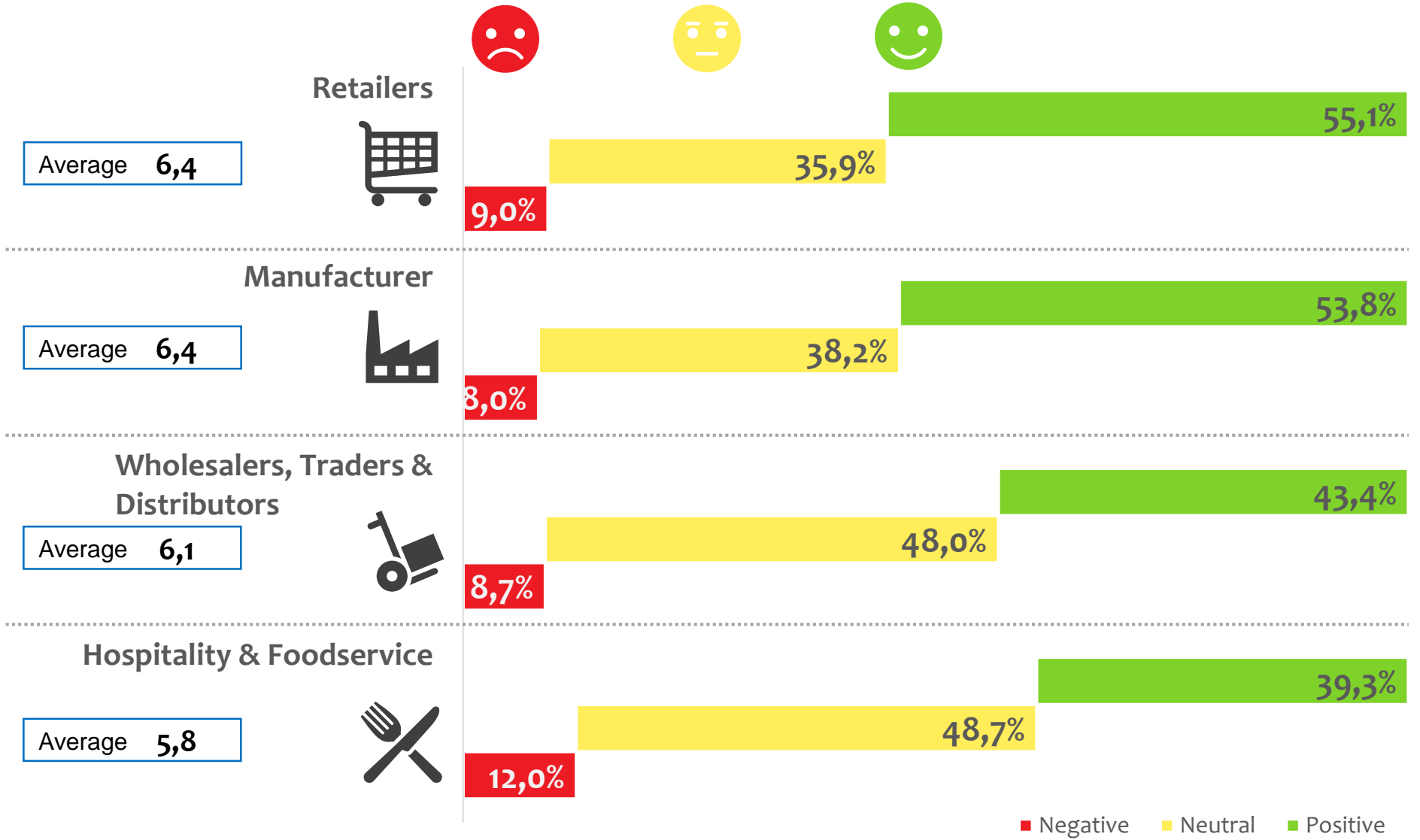
Satisfaction - current performance Vs Turnover



Overall, how satisfied are you with the **current performance of your company?**

By **Category**

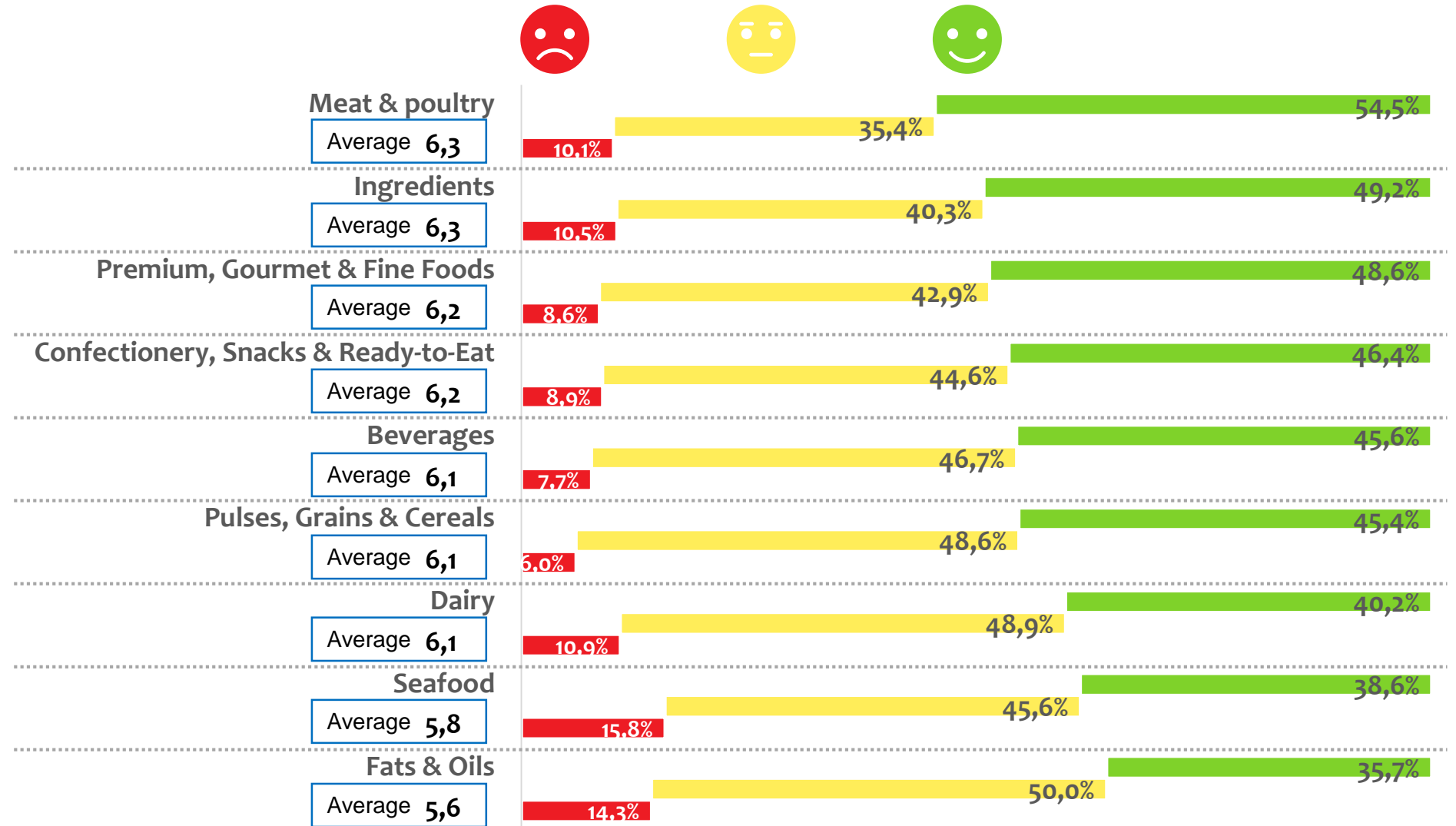
Satisfaction - current performance Vs Category



Satisfaction - current performance Vs Activity

Overall, how satisfied are you with the **current performance** of your company?

By **Activity**

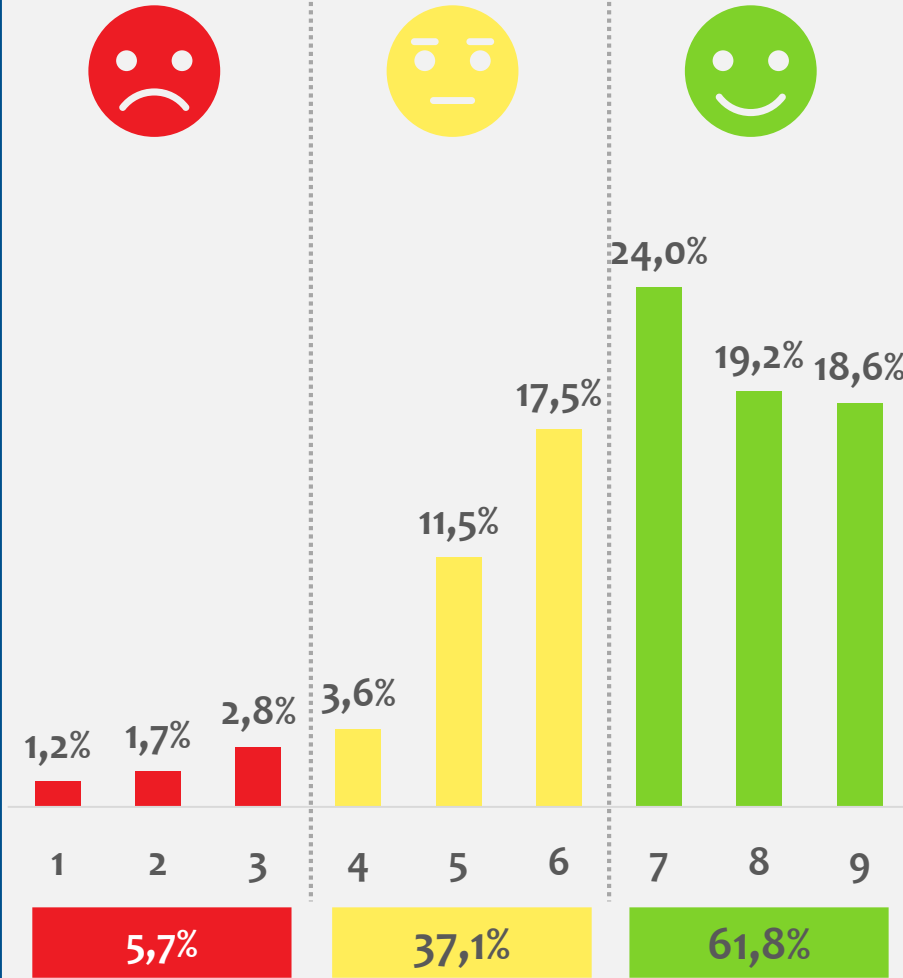


In your opinion, the **performance of your company** in the future will be:
12 months vs 3 years

In your opinion, the **performance of your company** in the future will be:

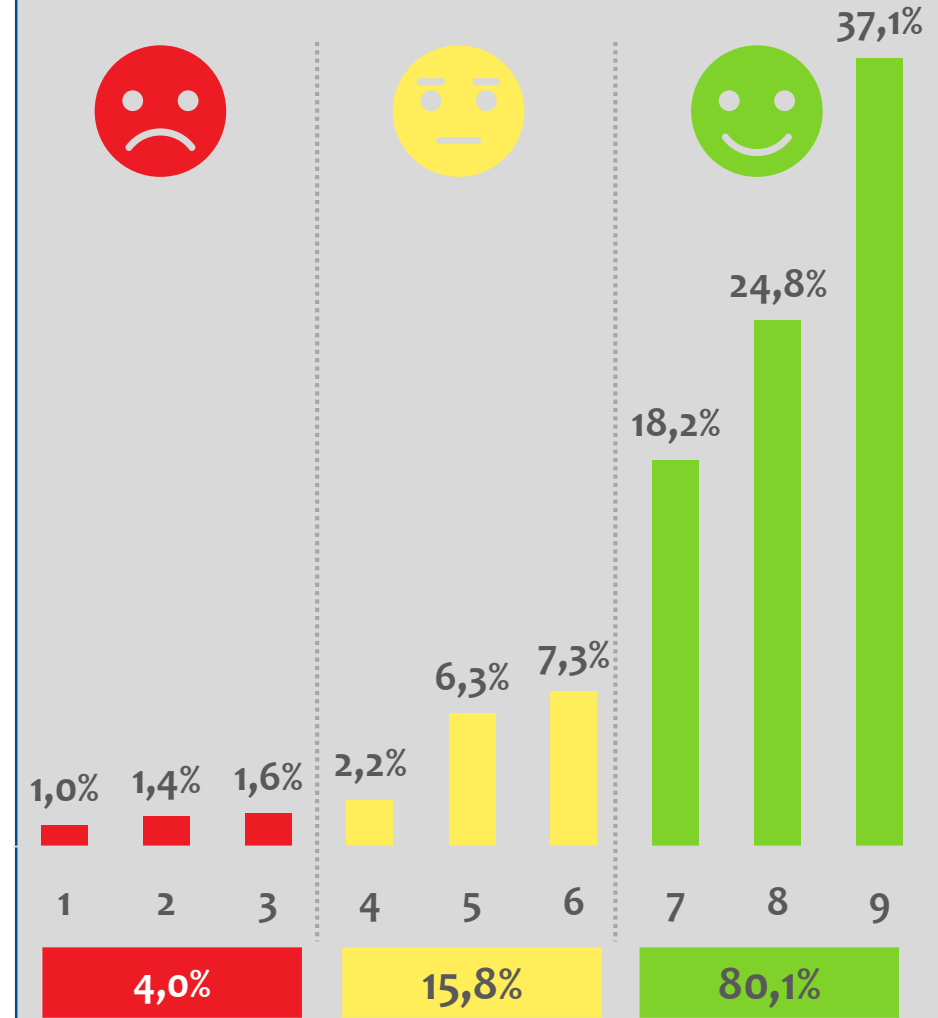
Confidence over the next **12 months**

Average: **6,8**



Confidence over the next **3 years**

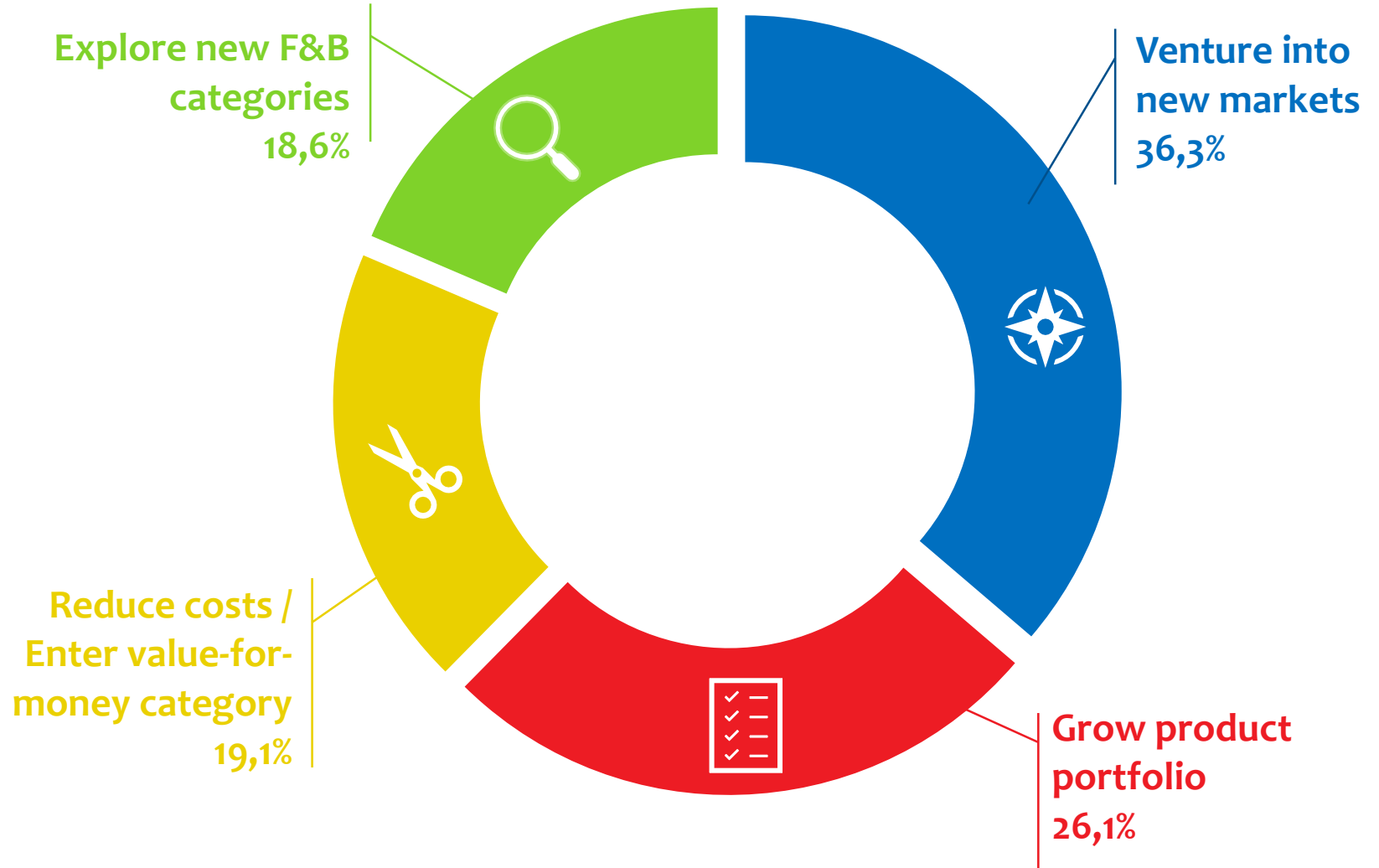
Average: **7,5**



**What is your *top growth strategy*
for the next 3 years?**

Top growth strategy

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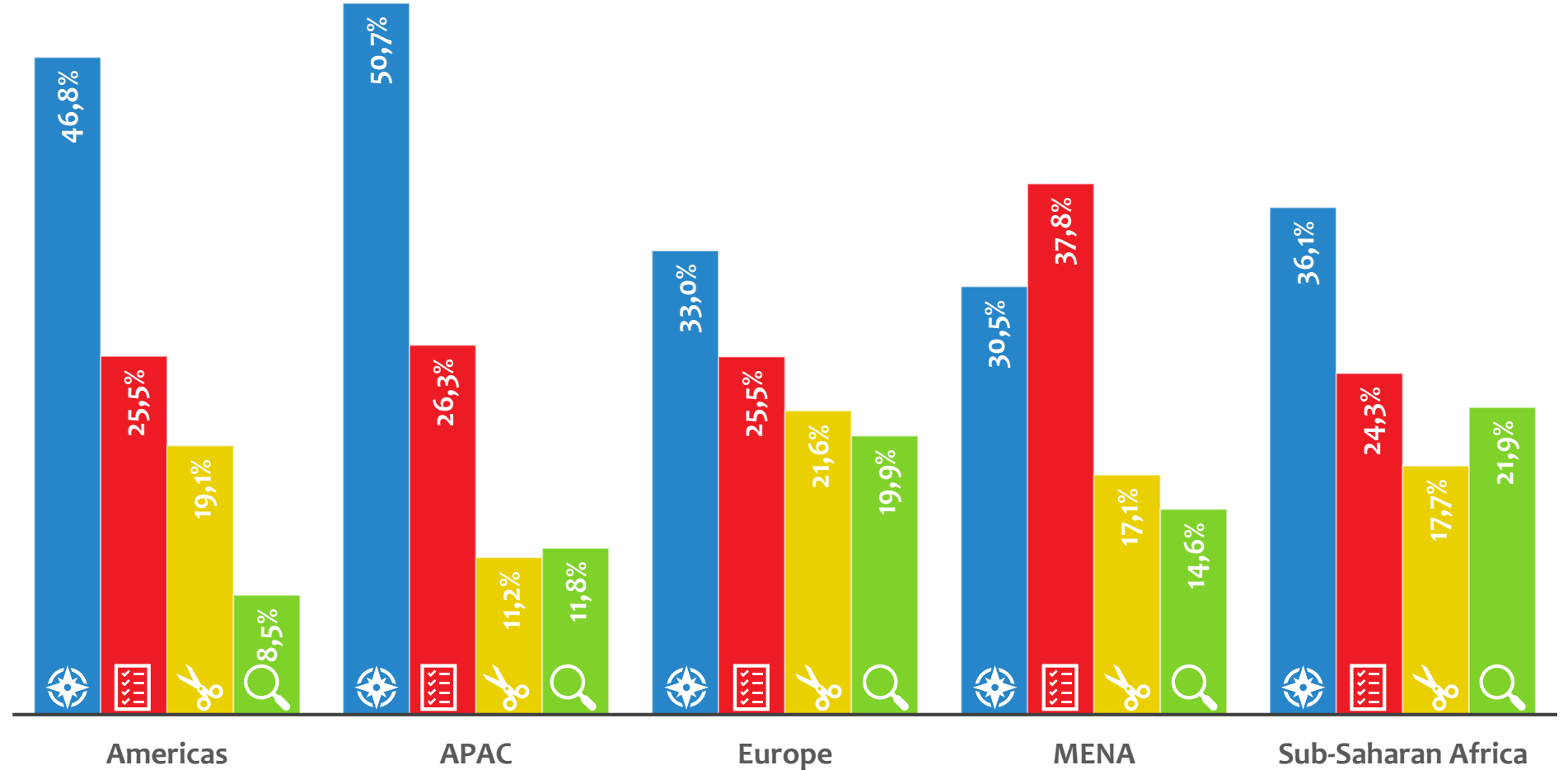


Top growth strategy Vs Region

- Venture into new markets
- Grow product portfolio
- Reduce costs / Enter value-for-money category
- Explore new F&B categories

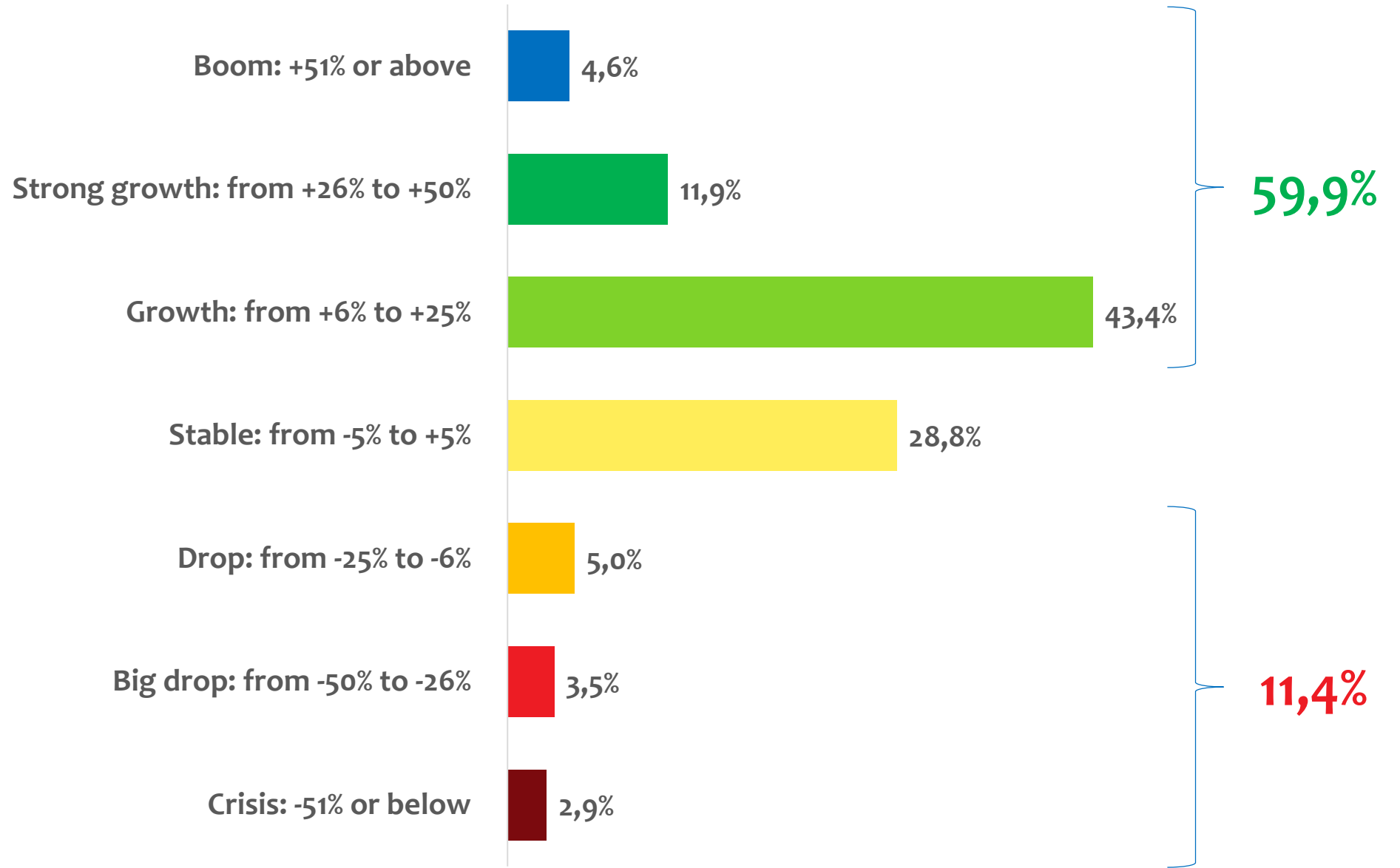
What is your **top growth strategy** for the next 3 years?

By **Region**



*How do you expect the **turnover** of your company to change during the next 12 months?*

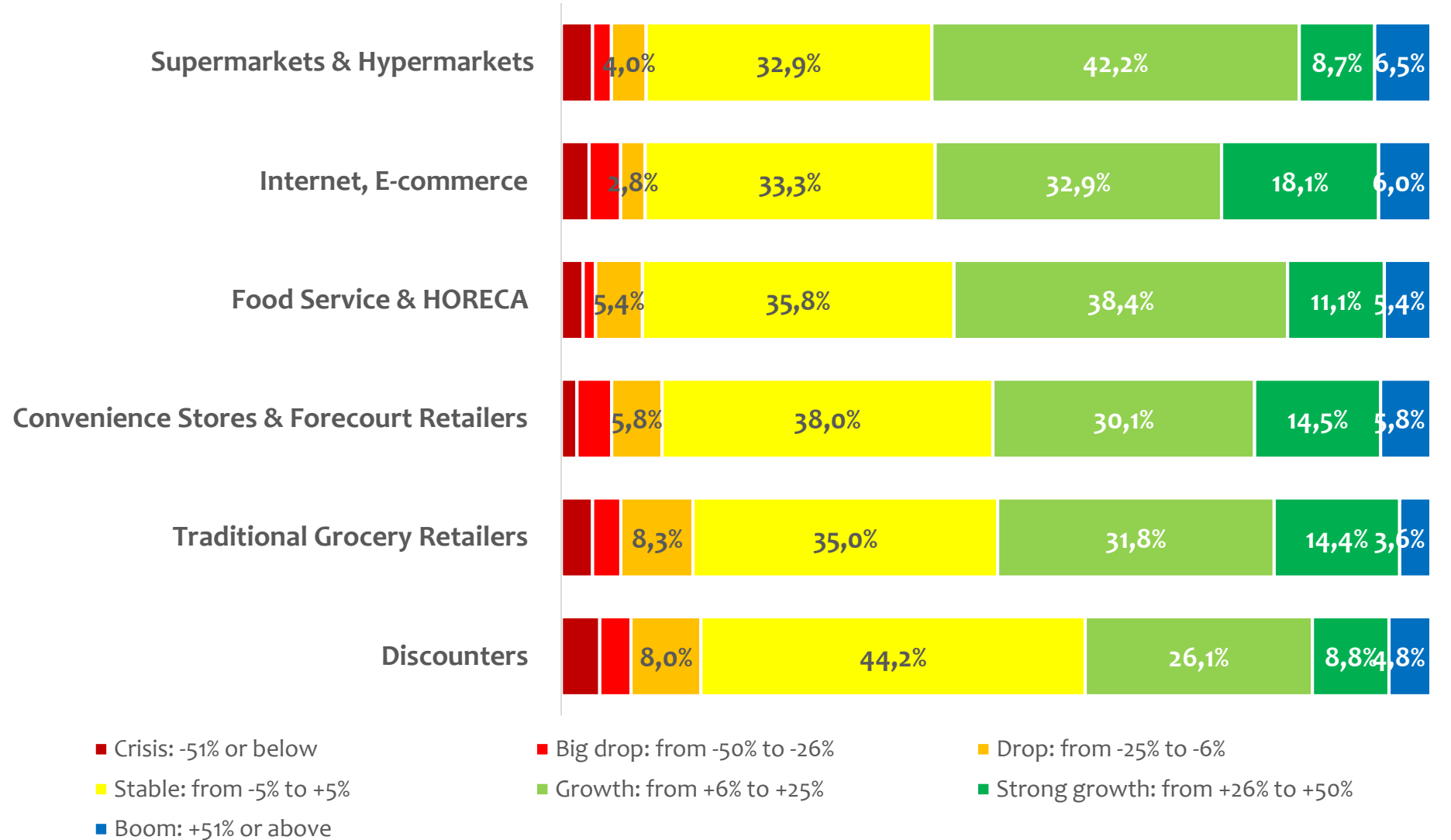
How do you expect the turnover of your company to change during the next 12 months?



How do you expect your company will perform across the following channels in 2019 (vs 2018)?

Manufacturer

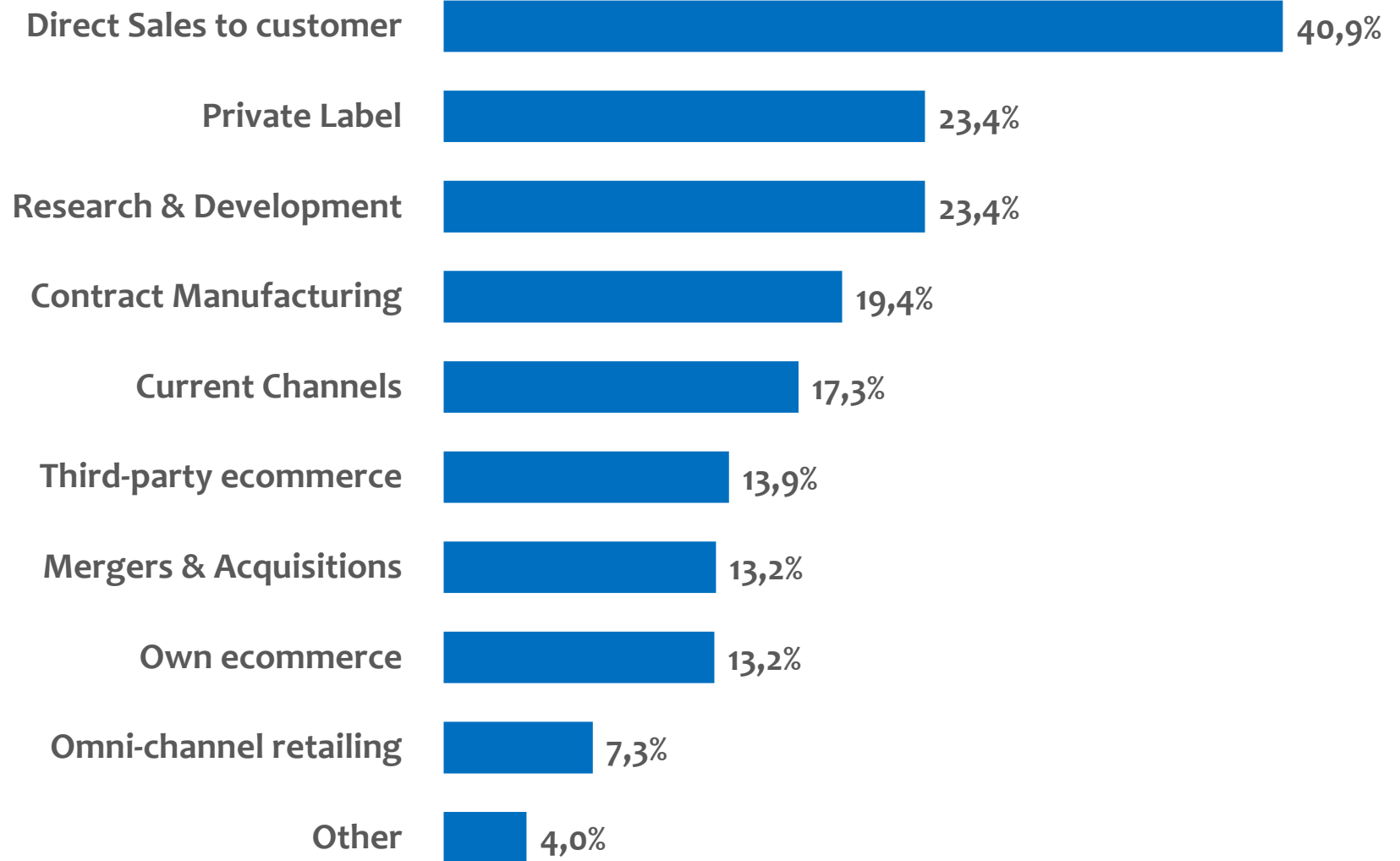
Channels performance - Manufacturer



Which of the following will **affect your product portfolio** and strategy the most in the next 12 months?

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Product portfolio and strategy



Which of the following *technologies* clusters will *impact* the F&B Industry the most in 2019?

Which of the following technologies clusters will impact the F&B Industry the most in 2019?

Technology

■ No impact at all ■ Limited impact ■ Noticeable impact ■ Significant impact ■ Extreme impact



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Thank you!

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