



IGD Academy

Prepared for:

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ASIAN RETAIL TRENDS IMPACTING THE MEAT CATEGORY

Today's presentation



Asia's evolving grocery markets



Trends influencing the meat category



Summary



59.4%

of the world's
population

54%

of the global
middle class

4.9%

forecast GDP
CAGR 2014-20

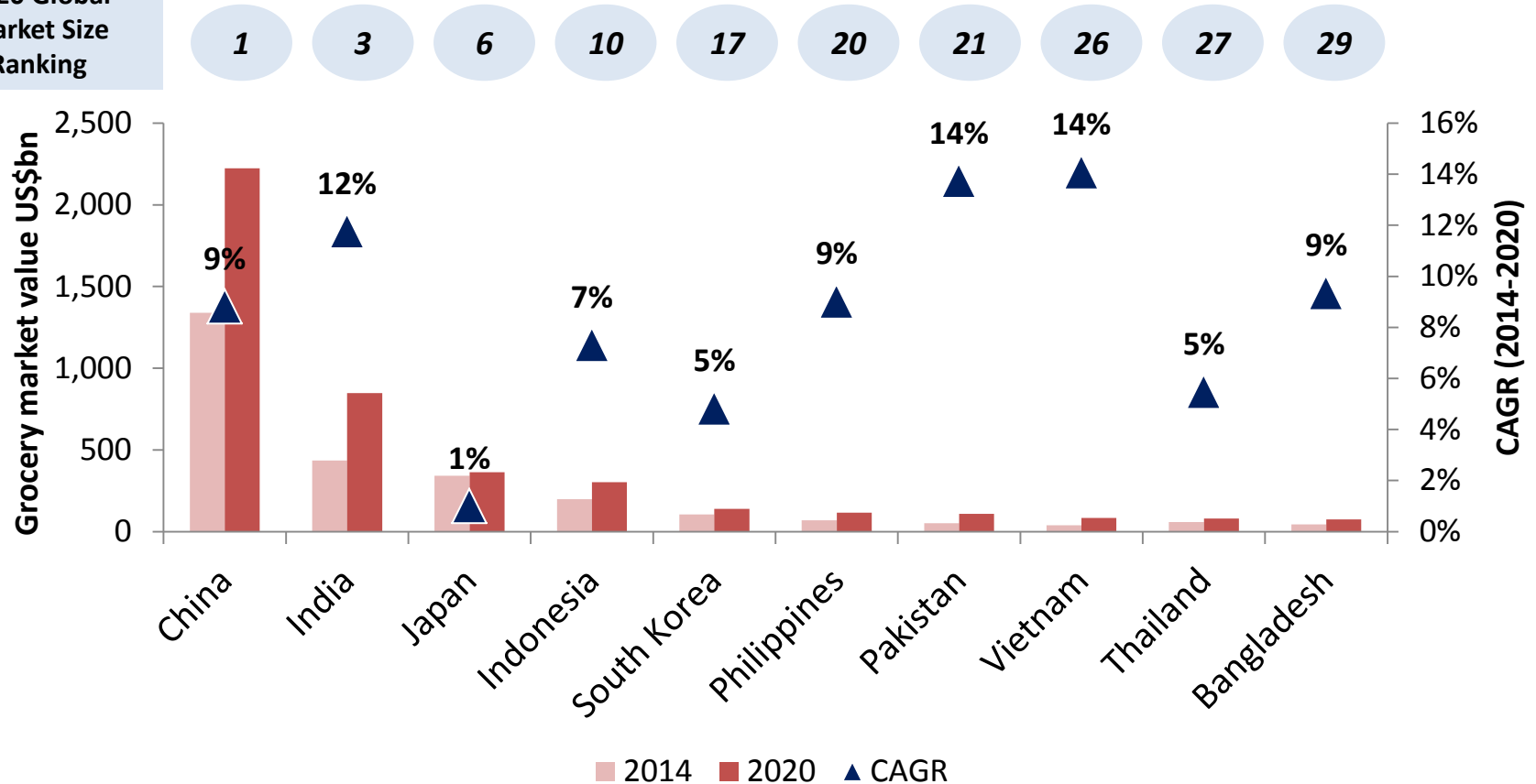
8.5%

grocery market
CAGR 2014-20

Asia's grocery markets rising up the ranks



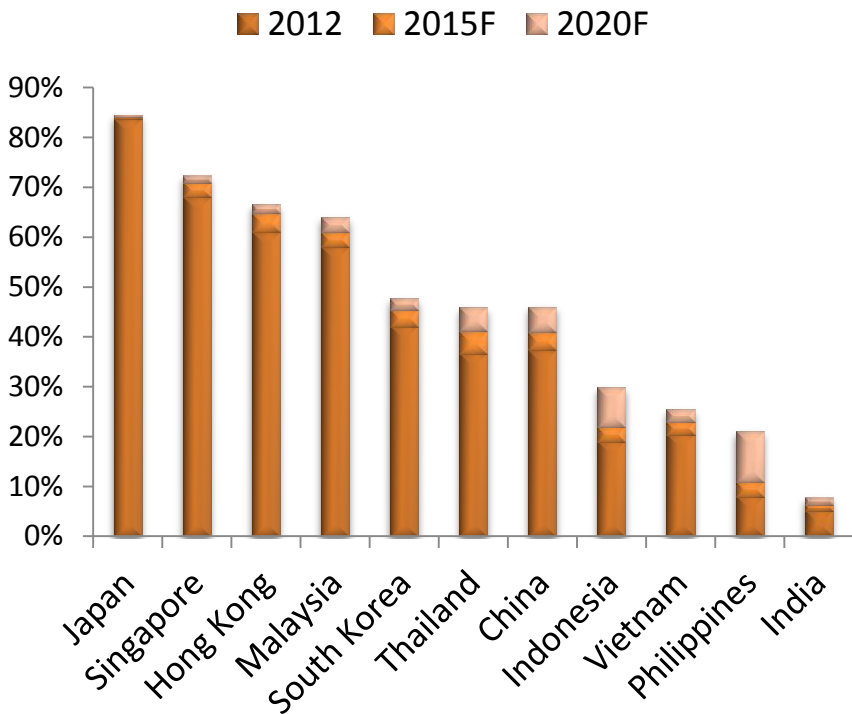
2020 Global
Market Size
Ranking



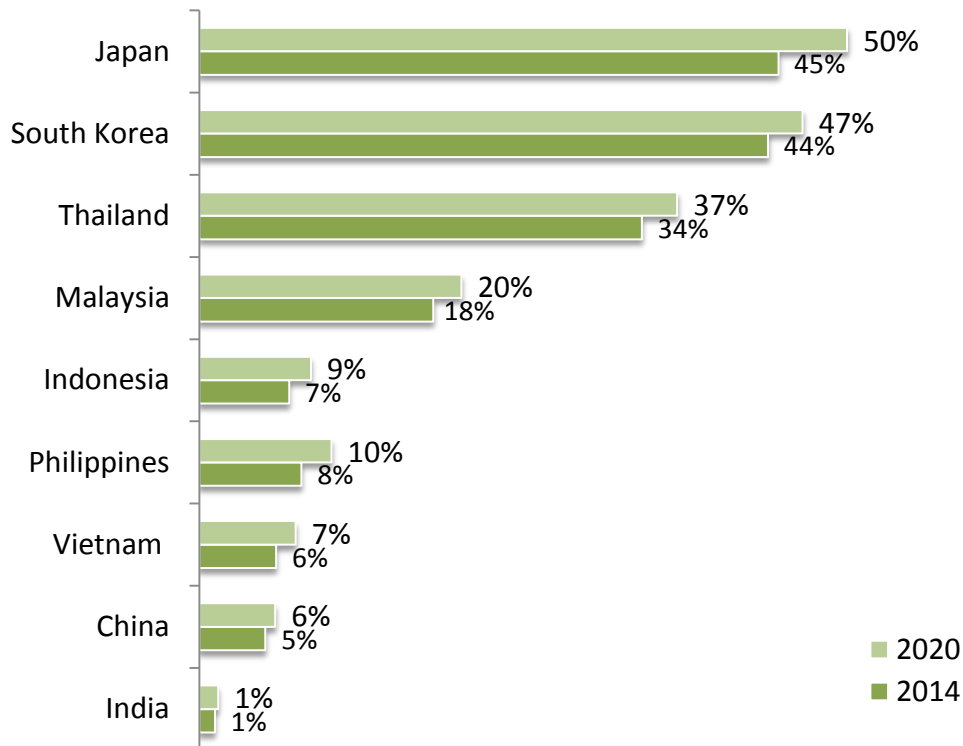
And the scope for future growth remains huge



Modern trade market size (estimates)



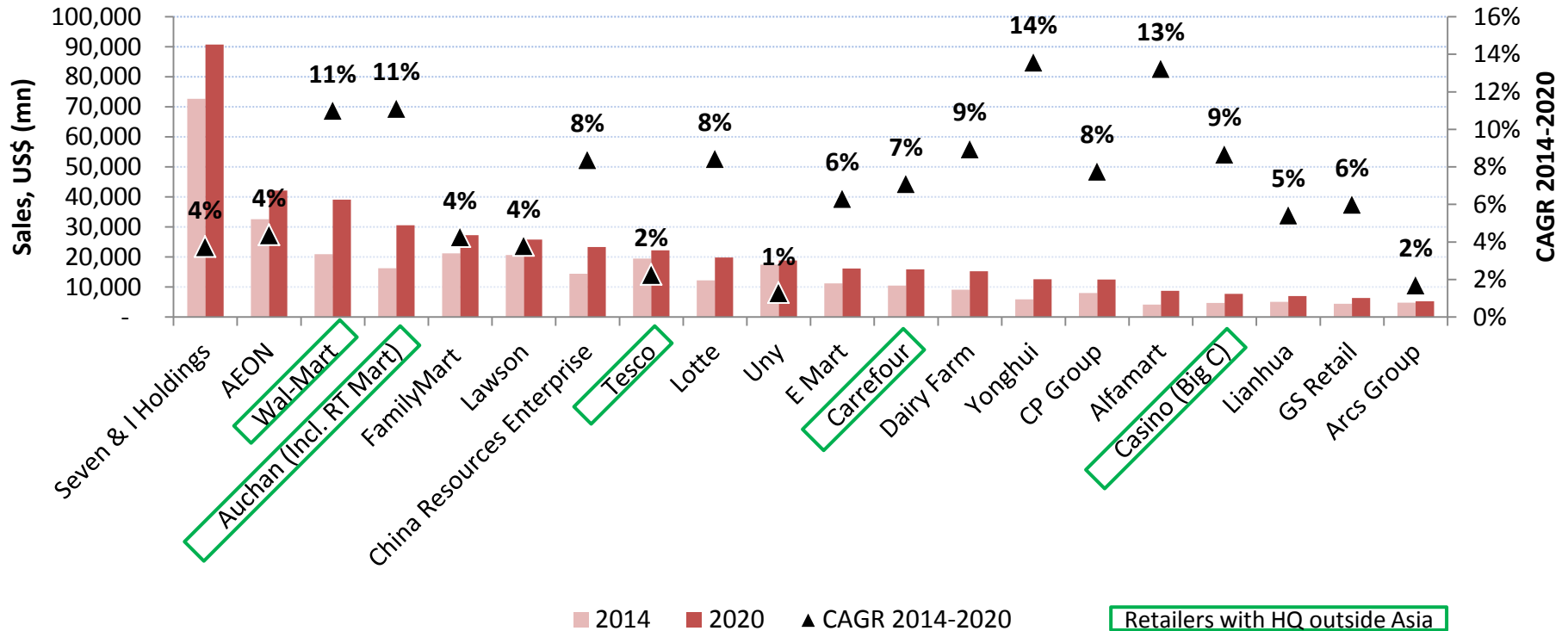
Top 10 retailer market shares aggregated



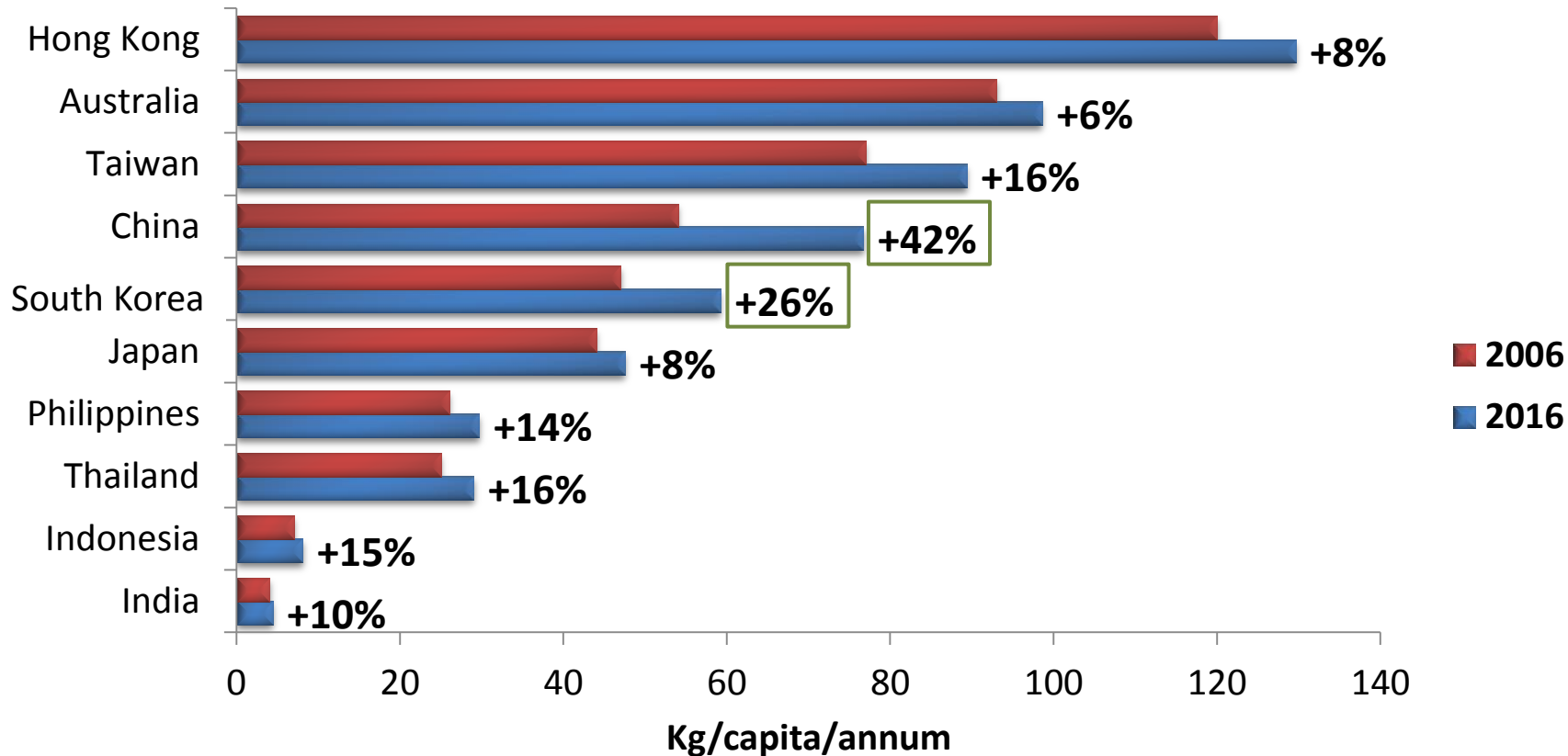
Domestic and regional retailers lead the way



Top 20 grocery retailers in Asia in 2020F



Meat consumption continues to grow



Trends influencing the meat category



**Satisfying the
ever more
sophisticated
Asian shopper**



**Communicating
quality and
provenance**



**Showcasing
product
expertise**



**Responding to
changing
lifestyles**



Middle classes demanding more and better products



Wide range – Fairprice, Singapore



Premium cuts – City Super, Hong Kong



Safety and hygiene – Aeon, Malaysia



Health and wellness – Tops, Thailand

Provenance and welfare has grown in importance



International – Aeon, Japan



Natural – Green & Safe, Hong Kong



Traceability – Tesco, Thailand



Welfare – ParknShop, Hong Kong

Imagery around the store to show quality



Walmart, China



Cold Storage, Singapore



Ole, China



Walmart, India

Counters and special features to engage shoppers



Ito Yokado, Japan



RT Mart, China



Tesco, Malaysia



Depachika, Japan

Education and expertise to differentiate



Auchan, China



Aeon, Malaysia



Central Food Hall, Thailand



City Super, China

Responding to changing lifestyles



Food Service – Aeon, Malaysia



Experiences – Ito Yokado, China

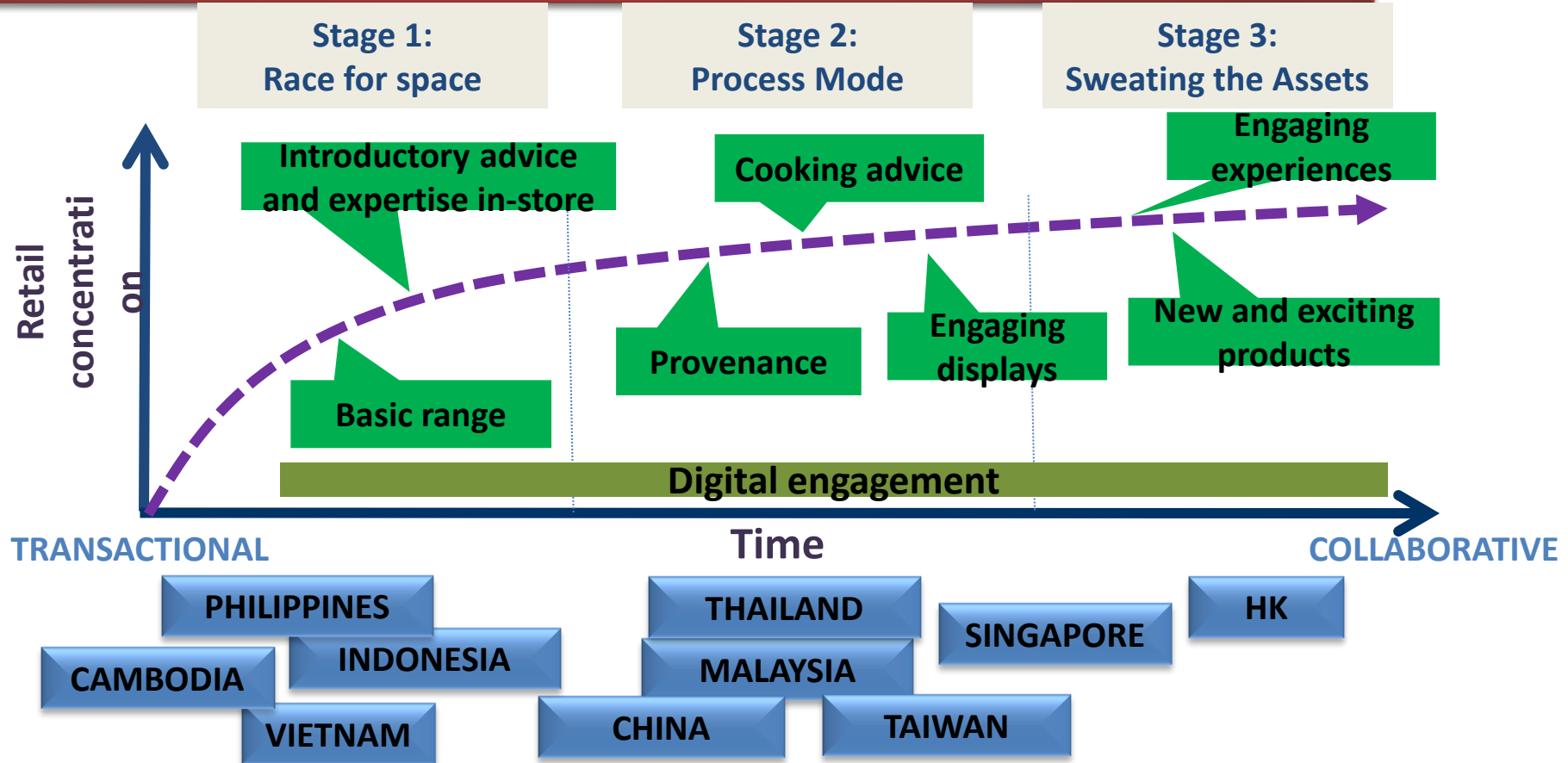


Convenience – Big C, Thailand



Digital – Jasons, Hong Kong

Trends will vary based on market development



Summary – key points to take away...



- 1** The market is shifting and rapidly evolving
- 2** Retailers are looking for opportunities to differentiate
- 3** More sophisticated shoppers = greater opportunity
- 4** Different solutions required depending on market development
- 5** Remember local nuances
- 6** Authenticity will become more important

Get in touch!

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Or visit: www.igd.com