THE HEART OF SWEETS AND SNACKS
IN THE MIDDLE EAST

8-10 November 2022, Dubai

ISM MIDDLE EAST

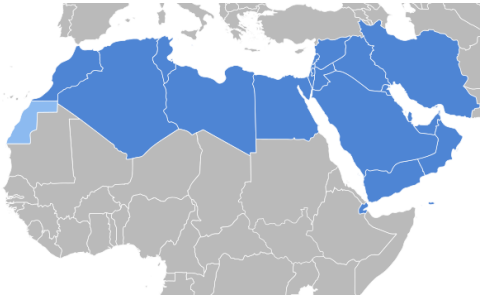
ISM Middle East 2022
Market Insights

www.ism-me.com

MENA region

MENA region

- According to the World Bank the countries of the MENA region are:
  - Algeria
  - Bahrain
  - Djibouti
  - Egypt
  - Iran
  - Iraq
  - Israel
  - Jemen
  - Jordan
  - Kuwait
  - Libanon
  - Lybia
  - Morocco
  - Oman
  - Saudi Arabia
  - Syria
  - Tunesia
  - United Arab Emirates
  - Westjordan
  - Gaza



Countries of the Middle East and North African region

- 380 million inhabitants

- In an extended version Turkey counts to the MENA region as well

MENA Region – an emerging region

Tap into the potential of an emerging region

Society:
multi-ethnic, young and affluent

Population:
expected growth of population, coupled with increasing per capita income

Tourism:
boost from Expo 2020, FIFA World Cup 2022

Culture:
diversity creates demand for international treats

Health consciousness:
increasing demand for healthy and organic products

Economic Development:
an up and coming area

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Trends*

*Provided by our knowledge partner Innova Market Insights

Trend No. 1 / Shared Planet

- Joint responsibility: Trust and transparency are key to building a product life story that stands up to scrutiny
- „Health of the planet“ is now the top global issue for consumers
- Trust and transparency are key to help consumers to make responsible choices
- Building trust with a more tangible communication strategy

Trend No. 2 / Plant-Based

- Nutrition and sustainability play a bigger role as brands refine the next generation of plant-based foods
- Plant-based is a canvas for innovation and driven by trend no. 1
  - Ethical driven trend
- Challenge: Consumers are looking for quality alternatives in taste, mouthfeel and indulgence in sweets and snacks

+103% ...growth in sweet and snack launches* with a **plant-based** and a **premium & indulgent** claim
(Global, Nov 2019 - Oct 2020 vs. Nov 2020 - Oct 2021)

For what reasons would you consider plant-based alternatives?

	2020	2021	
1	IT IS HEALTHIER	IT IS HEALTHIER	1
2	IT BRINGS VARIETY TO MY DIET	IT IS BETTER FOR THE PLANET	2
3	IT IS BETTER FOR THE PLANET	IT BRINGS VARIETY TO MY DIET	3
4	IT TASTES BETTER	IT REPRESENTS MY VALUES & BELIEFS	4

Trend No. 3 / Tech to Table

- Technological advances have created serious innovation opportunities for the entire food and beverage industry

- Personalized nutrition
  - Bio markers, tracking and knowing if the personal nutrition and diet goals are really being achieved
  - Highly driven by conscious consumers

- Huge opportunity for technology not only to improve the experience but also to develop healthier products

2 in **5**
consumers globally

"I am more open to new technologies now that I have seen where it has brought plant-based innovation"

Trend No. 4 / Shifting Occasions

- The pandemic reshaped existing eating occasions and helped form new ones
- There is not just only breakfast, lunch and dinner but various occasions
- Consumers are looking for products that fulfil the need in these occasions (on-the-go, delivery grocers, etc.)
- New occasions led to new channels (delivery grocery stores)

60%
of consumers globally say

"I expect companies/brands/restaurants to expand on services that enhance social interactions"

Trend No. 5 / Voice of the consumer

- Consumers are calling the shots and expecting more engagement from brands
- It is all about consumer engagement – how to build trust, how to make the consumer feel he is part of the brand?
- It is going beyond just providing products and buying them, consumers seek for influence on the product itself („creating flavours, package design, etc.)

Trend No. 6-10 / Innova Market Insights Trend Reel

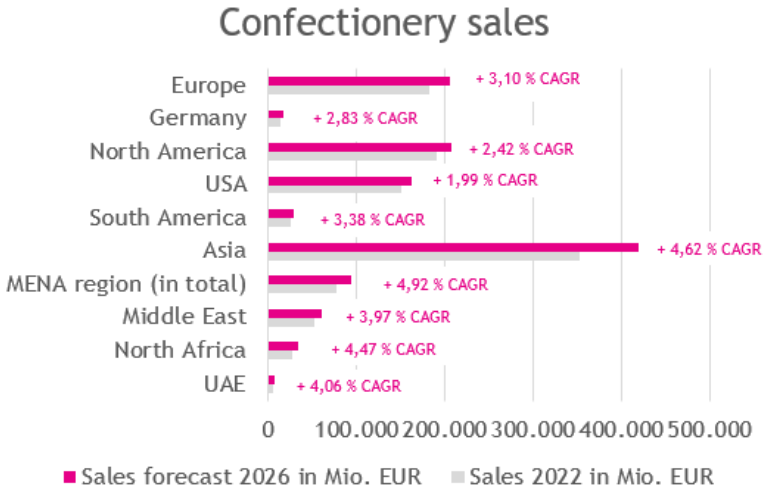
Source: Innova Markets Insights - https://www.innovamarketinsights.com/

Market Data

Growing Markets / Confectionery

The MENA region has the strongest growing confectionery market world wide (CAGR-rate)!

	Sales 2022 in Mio. Euro	Sales forecast 2026 in Mio. Euro
Europe	181.676	205.273
Germany	14.454	16.158
North America	190.351	209.446
USA	150.628	162.978
South America	25.095	28.661
Asia	352.936	422.857
MENA region (in total)	77.042	93.370
Middle East	51.773	60.500
North Africa	27.596	32.870
UAE	5.566	6.526

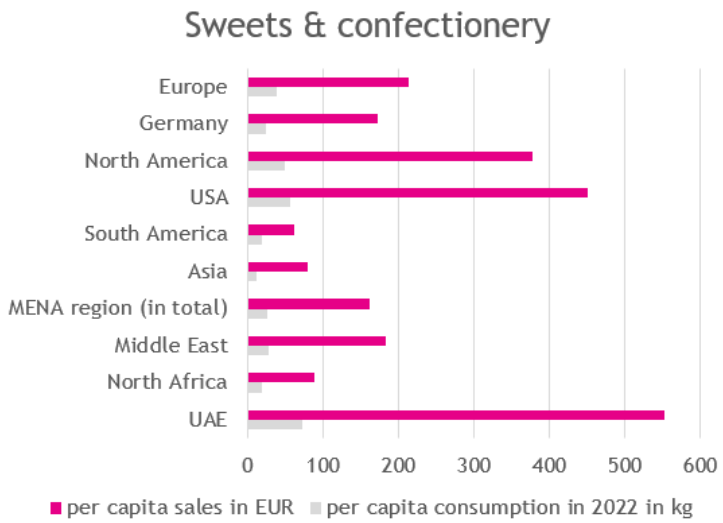


*=In-scope: chocolate, sugar confectionery, biscuits, ice cream, desserts; out-of-scope: dried fruit and similar, spreads containing cocoa.
Source: statista outlook Consumer Markets January 2022

Growing Markets / Confectionery

The UAE have the highest per capita consumption and per capita sales of confectionery world wide!

	Per capita consumption in 2022	Per capita sales
Europe	37,3 kg	213,92 €
Germany	23,3 kg	172, 31 €
North America	49,7 kg	377,11 €
USA	56,9 kg	449,90 €
South America	19,3 kg	61,49 €
Asia	10,9 kg	78,62 €
MENA region (in total)	25,62 kg	161,83 €
Middle East	27,56 kg	183,31 €
North Africa	19,02 kg	88,82 €
UAE	71,4 kg	552,09 €



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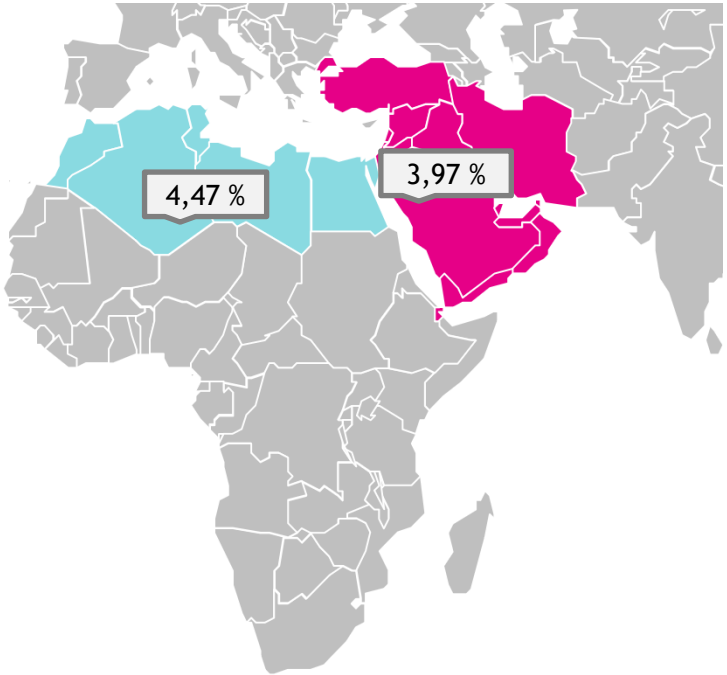
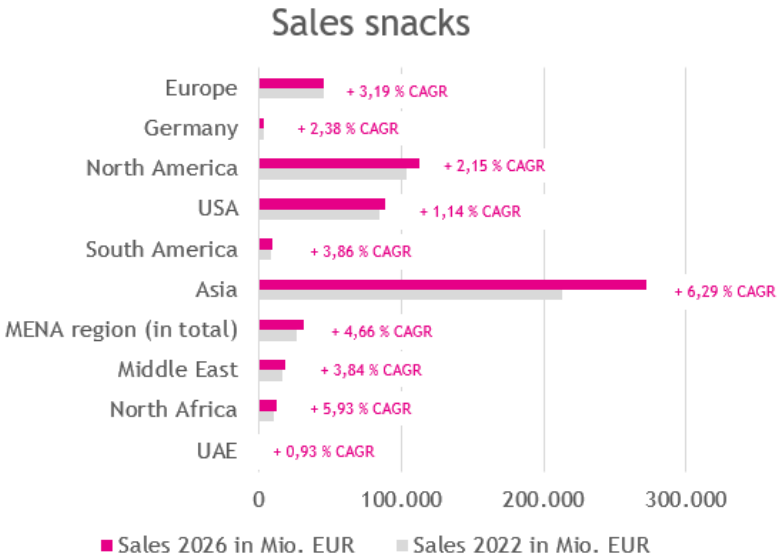
Growing Markets / Confectionery



Please note: The source of these data is statista. The data of other studies and analyses might differ to these, sometimes even significantly.
All studies have one thing in common though: The MENA region‘s market is the strongest growing market until 2026!

Growing Markets / Snacks

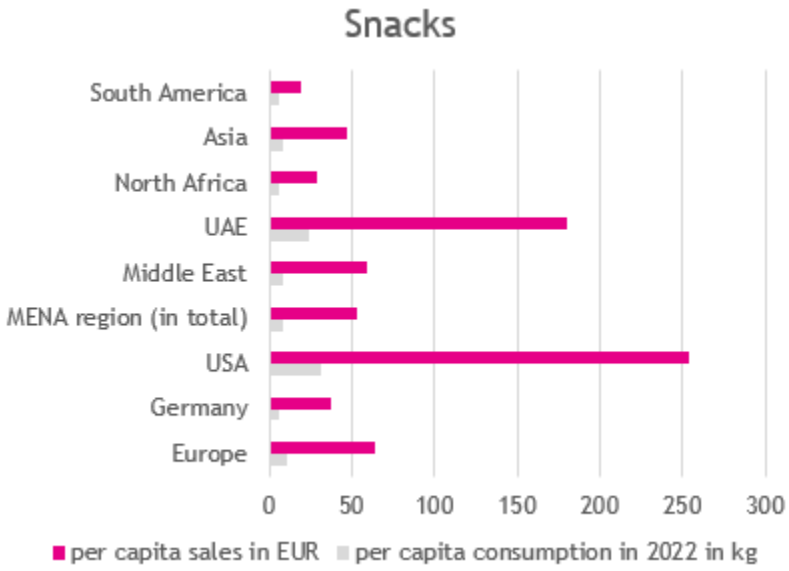
	Sales 2022 in Mio. Euro	Sales forecast 2026 in Mio. Euro
Europe	54.044	61.283
Germany	3.120	3.428
North America	103.422	112.617
USA	84.990	88.920
South America	8.004	9.312
Asia	213.103	271.982
MENA region (in total)	26.196	31.436
Middle East	16.101	18.723
North Africa	10.095	12.713
UAE	1.822	1.891



*=In-scope: crisps, expanded snack products (e.g. peanut flips, onion rings, potato puffs), biscuits and crackers, pretzels; out-of-scope: dried fruit and similar,
Source: statista outlook Consumer Markets January 2022

Growing Markets / Snacks

	Per capita consumption in 2022	Per capita sales
Europe	11,2 kg	63,64 €
Germany	6,4 kg	37,19 €
North America	26,4 kg	204,89 €
USA	31,7 kg	253,85 €
UAE	24,4 kg	180,72 €
MENA region (in total)	8,09 kg	52,82 €
Middle East	8,69 kg	59,73 €
North Africa	6,04 kg	29,35 €



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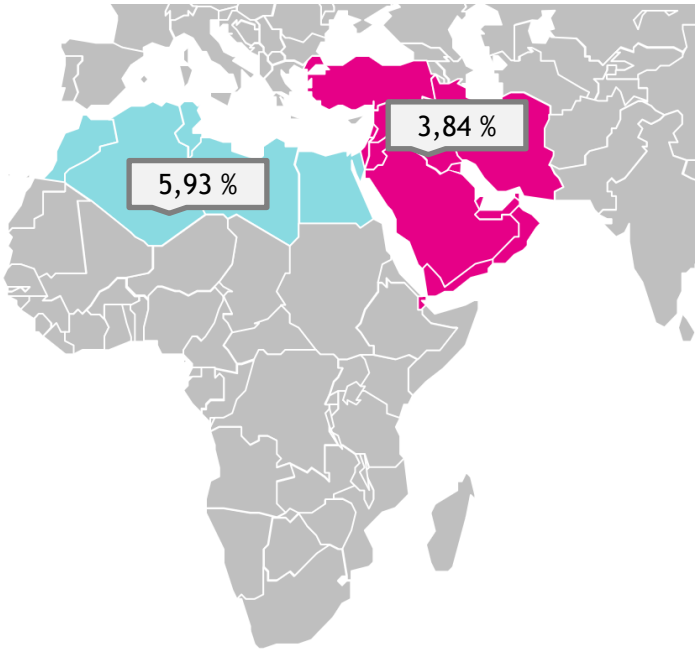
Growing Markets / Sales



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