

Trends of Rice Markets & Consumer Preferences

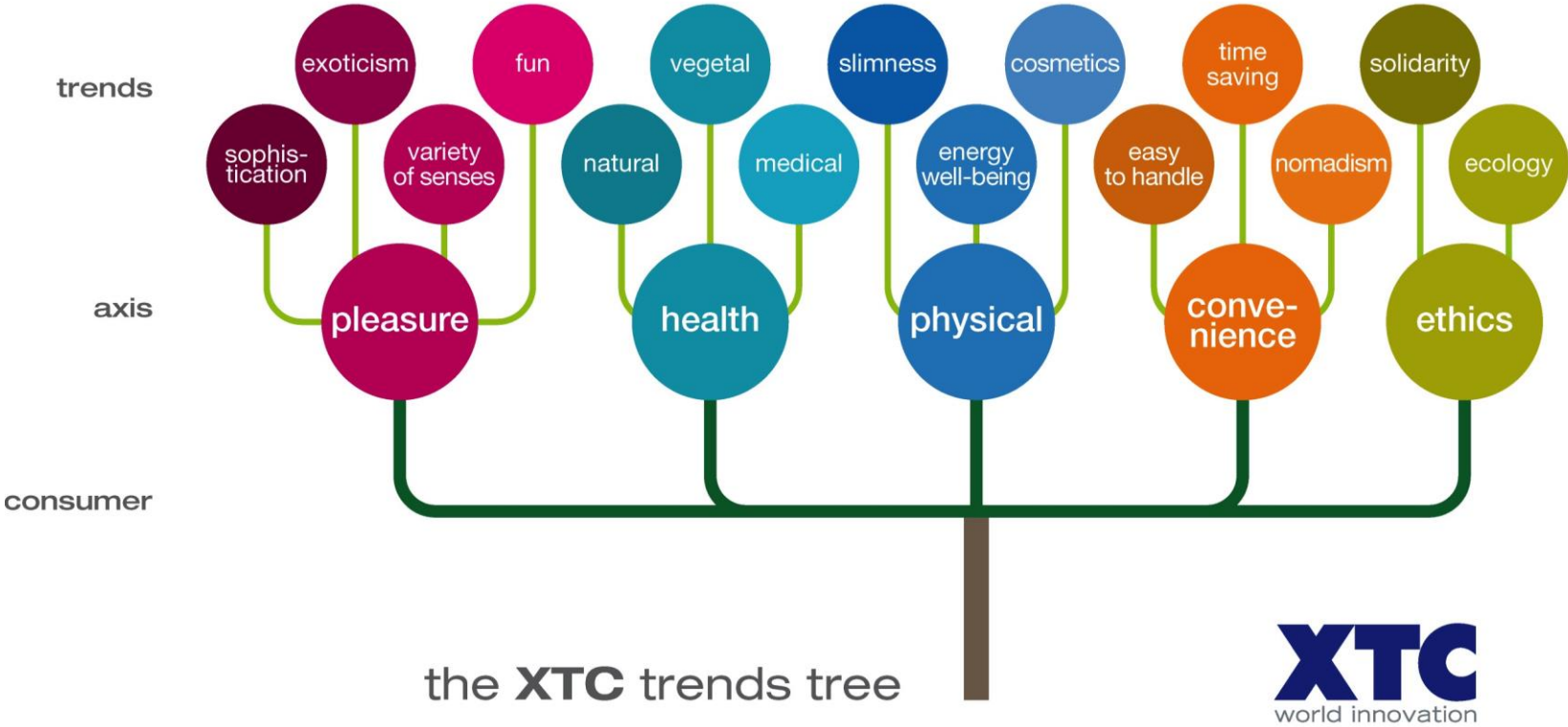
Two different considerations and strategies:

- Diversification of product portfolio
 - Positioning of products (presentation, place, promotion, price)
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- Innovative rice derived products
 - (oil, milk, starch, protein, husk-energy, ash-silica, ...)
 - Rice as grains for food:
 - Innovative presentations (e.g. microwaveable)
 - Branding (promoting) with trending attributes (healthy, convenient, social, sustainable, fair-trade, environment, clean & 'green', traditional, heritage, PGI ...)

Trends: Sources of Information

- XTC Consumer Trends Tree
 - <http://intl.xtcworldinnovation.com/default.asp?id=19>
- Innova Market Insight
 - <http://www.innovadatabase.com/>
 - <https://www.globalfoodforums.com/food-news-bites/2018-food-trends/>
- Exhibitions, Fairs, Conferences, Market visits, Store visits, every meeting with a buyer.

XTC Consumer Trends Tree



Innova Market Insights @Thaifex '17

AGING CONCERNS
A SWEET BALANCE

CLEAN SUPREME
DISRUPTIVE GREEN

GETTING CRAFTY
THE PROTEIN BOOM

ASIA TRENDS
THAIFEX 2017

INNOVA MARKET INSIGHTS

A SWEET BALANCE

The number of Asian product launches with **stevia** has increased by a CAGR of **+47%** from 2012 to 2016.

+47%
CAGR FOR STEVIA IN ASIAN MARKETS (2012-2016)

ASIA TRENDS
THAIFEX 2017

INNOVA MARKET INSIGHTS

AGING CONCERNS

New product launches with **bone & joint health claims** are increasing in Asian markets. A CAGR of **+36%** has been reported from 2012 to 2016.

+36%
CAGR IN ASIAN BONE & JOINT HEALTH CLAIMS (2012-2016)

"We make snacks that are..."

INNOVATIVE

FUN

JOYFUL

DELICIOUS

FUNCTIONAL

HIGH-QUALITY

and **HEALTHY.**"

ASIA TRENDS
THAIFEX 2017

INNOVA MARKET INSIGHTS

CLEAN SUPREME

No additives/preservatives accounted for **67%** of new products with **clean label*** claims in Asia in 2016.

67%
NO ADDITIVES/PRESERVATIVES

ASIA TRENDS
THAIFEX 2017

INNOVA MARKET INSIGHTS

DISRUPTIVE GREEN

The number of Asian product launches with **"plant-based"** claims has **doubled** in one year (2016 vs. 2015).

+100%
PLANT-BASED CLAIMS IN ASIA (2016 vs. 2015)

ASIA TRENDS
THAIFEX 2017

INNOVA MARKET INSIGHTS

THE PROTEIN BOOM

Among Asian markets, China shows the **fastest growth** in protein claims. CAGR rose by **+26%** from 2012 to 2016.

+26%
CAGR IN CHINESE PROTEIN CLAIMS (2012-2016)

