

A Work Project, presented as part of the requirements for the Award of a Master's degree in Management from the Nova School of Business and Economics.

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**From global efficiency to local self-sufficiency**  
Impact of changing consumer trends on the food industry

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## **Abstract**

This third chapter of “From global efficiency to local self-sufficiency” represents the trend analysis part. Chapter one and two outlined world economic developments and its impact on consumer trends as well as introduced the food industry. This third section connects these topics while investigating **which changing consumer trends shape the food industry**. Based on 28 in-depth interviews, qualitative prospection attempts to validate topic relevance and identifies categories to group consumer trends. Quantitative validation consisting of 327 survey responses verifies identified trends and represents critical changes to respond to by supply-side of the food industry.

## **Acknowledgements**

First, I would like to thank my supervisor, José Miguel dos Santos Hortas Pita, for his support and valuable thoughts throughout the process of this work project. Second, I would like to thank all interview partners who were willing to share their experience, knowledge, and thoughts. Lastly, I would like to thank my team members Torstein Guddal and Benjamin Loisel for their unconditional contribution and encouragement for this work.

## **Keywords**

Business model, Change, Consumer trends, Consumer survey, Deglobalization, Food Industry, Five Marketing concept – Five Ps, Globalization, Growth-Share Matrix, Importance, Marketing, Qualitative research, Quantitative analysis, Strategy, Sustainability

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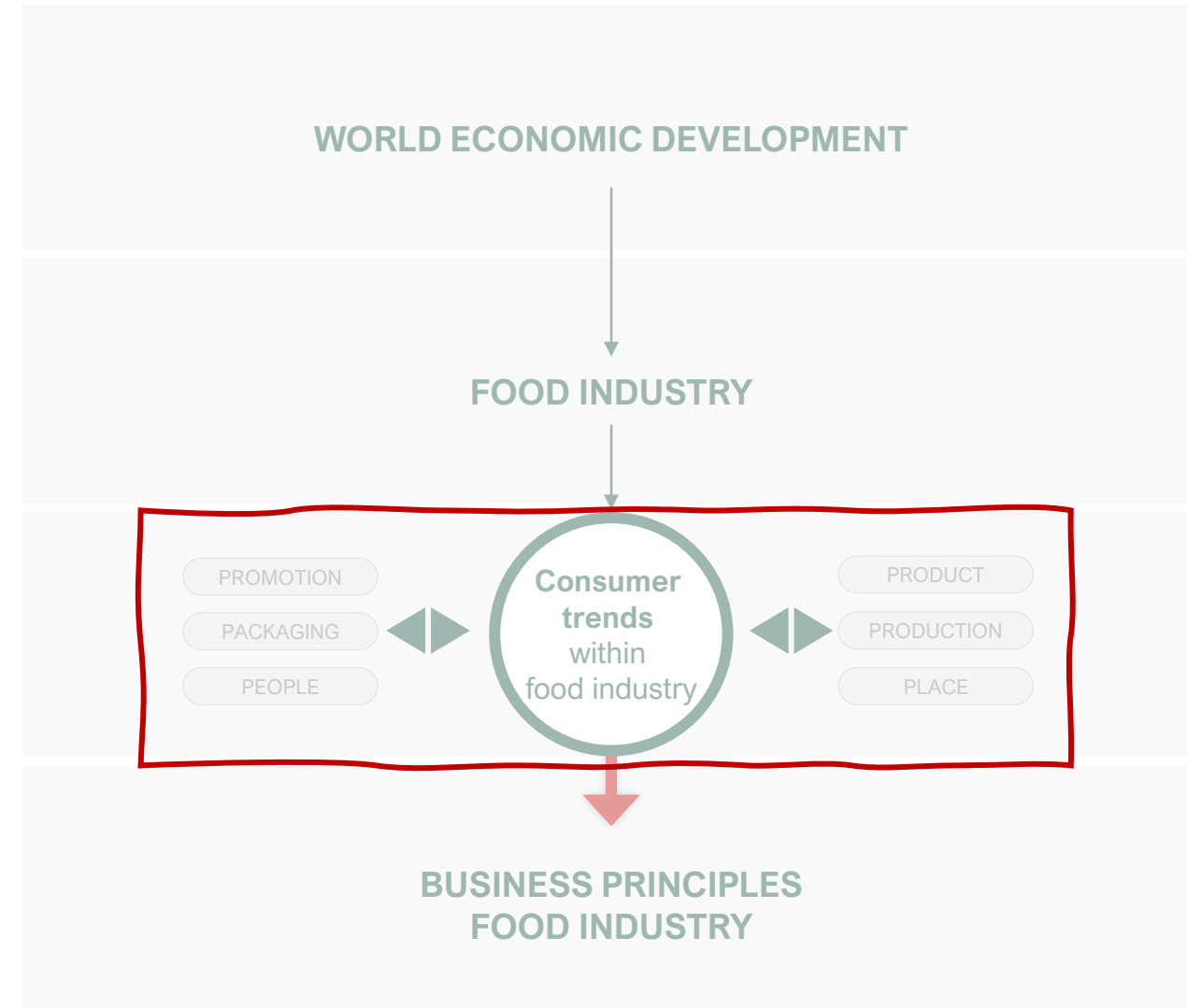
# Content

- 01 World economy development & its impact on consumer trends
- 02 Current food industry dynamics
- 03 Impact of changing consumer trends on the food industry
- 04 Recommendations for business strategy to respond to consumer trends
- 05 References
- 06 Appendix



## Impact of changing consumer trends on the food industry

Methodology, qualitative prospection and quantitative verification as well as consumer trend deep-dive



# Chapter 3: Analysis of consumer trends

World economic development

Food Industry dynamics

Analysis of consumer trends

Recommendations on trend adaption



## 3. Which changing consumer trends shape the food industry?

### 3.1 Methodology

Contextual framework of research scheme

### 3.2 Qualitative prospersion

3.1.1 **Supply** (producer) side interviewees profiles and results

*Farmers', Companies', Restaurants', Supermarkets' perspective on Globalization and consumer trends*

3.1.2 **Demand** (consumer) side interviewees profiles and results

*Consumers' perspectives on Globalization and consumer trends*

3.1.3 **Conclusion** and **implications** from qualitative research

*Points of con- and divergence of consumer trend perception*

*Redefined marketing categories according to interview results*

*Development of **question sets for further research** on consumer side*



### 3.3 Quantitative verification & deep-dive

#### Demand side deep-dive study

3.2.1 **Globalization/ Deglobalization** investigation of impact on consumer trends

3.2.2 **Consumer trends impact on Marketing Ps** within categories

*Redefined Ps according to qualitative interviews*



Impact of **changing  
consumer trends** on  
the food industry

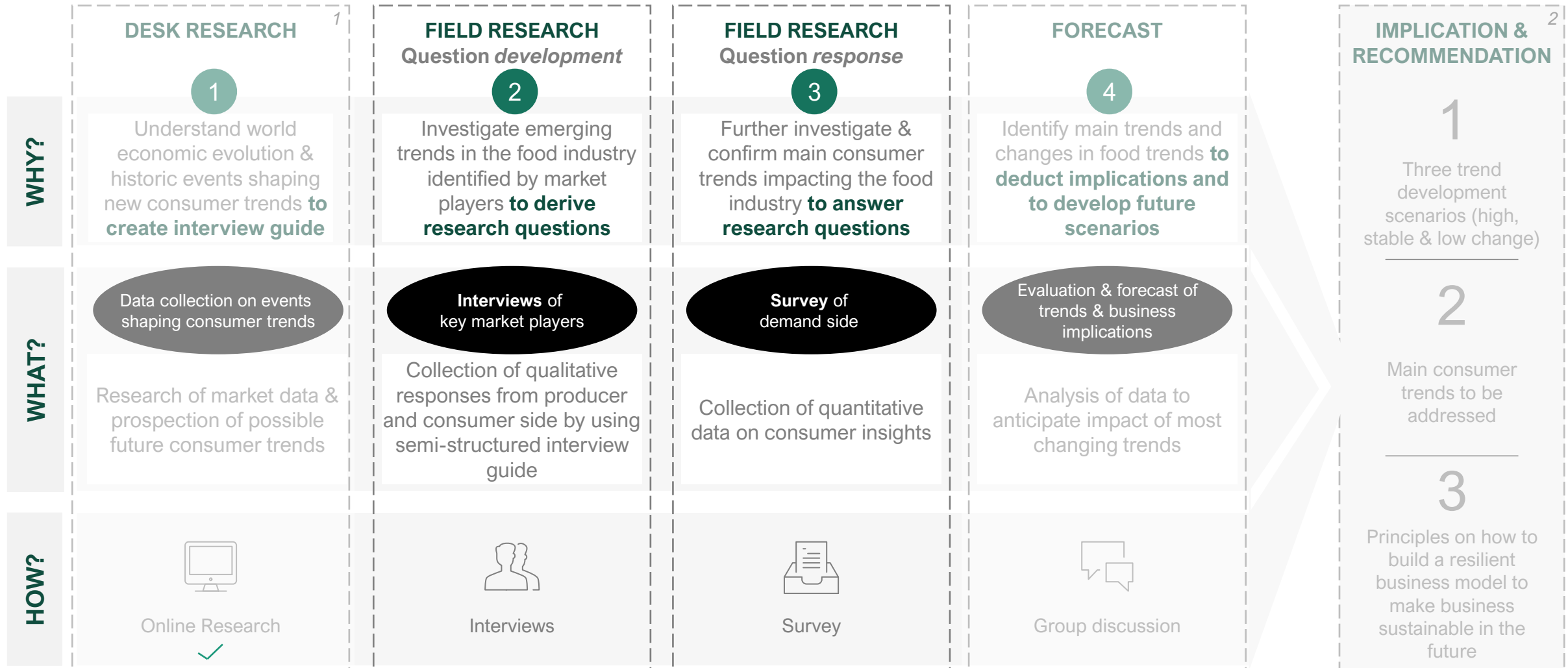


# 3.1 METHODOLOGY

Contextual framework consists of **qualitative** and **quantitative** research to devise detailed business recommendations

# Methodology of analysis consists of four steps to develop distinct implications

Qualitative interviews are conducted to investigate **relevance** – quantitative analysis is executed to **validate** results and deep-dive



References: (Yin 2011, 32-142), (Wenger 1999, 369-376), (Kelle 2006, 293-311), (1) Desk research is part of chapter 1 and 2, (2) Prospection and implications & recommendations are part of chapter 4



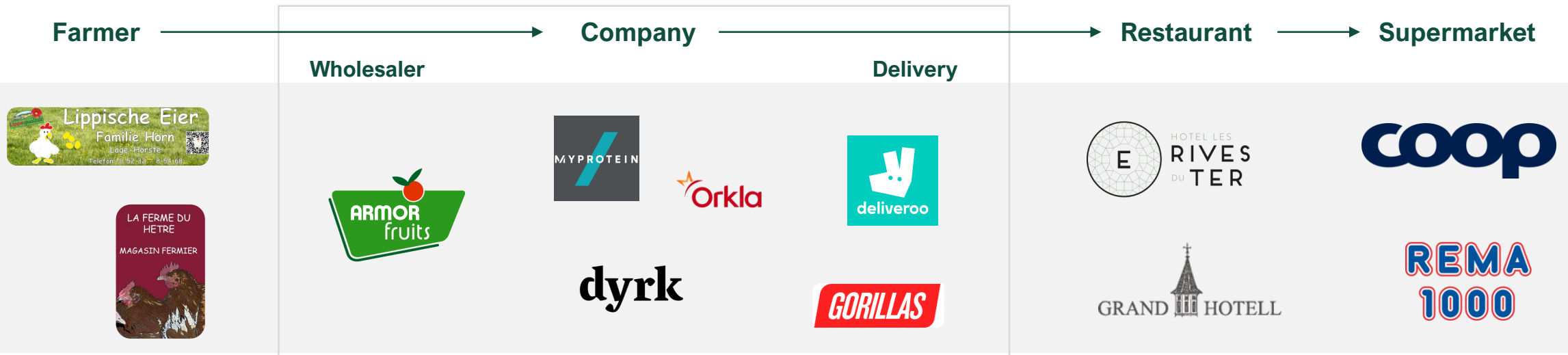
## 3.2 QUALITATIVE PROSPECTION

Interviews are conducted to **identify trends** within food industry, figure out if **divergence** between demand and supply side exists and whether the impact of Deglobalization on food industry is **worth to be investigated further**

# Supply side interview partners represent whole food supply chain

Interviews focused on investigating **13 different producers' perspectives<sup>2</sup>** from emerging food start-ups to big food enterprises

## RESPONDENT PROFILES



- Companies coming from Norway, France and Germany, UK, Netherlands
- Deliveroo is one of the biggest delivery companies in France and Netherlands
- Gorillas is currently fastest growing start-up in Germany<sup>1</sup>

## EXECUTION METHOD



Teams



Call



In Person

## TRANSCRIPTION METHOD

Recording via phone and notes on paper



Transcript & results in excel file

# Supply side interviews present impact of economic development on food industry

Respondents underlined **new trends** that can be considered as **drivers for Deglobalization** shifts in food industry

## SABRINA CORUBLE – Producer: La Ferme du Hêtre

“We began importing products from Poland or New Zealand even though these could have been produced in Norway. However, main **drivers for selecting suppliers** become focusing on **respecting animals and earth recently.**”

## EVA GRUNDE – Supermarket: Rema Flekkefjord

“Recent years of economy changed **focus towards local food, ethical production and organic**, without genetic modification. Consumers are more aware of the food they buy.”

## SEBASTIAN HORN – Farmer: Landwirtschaftlicher Betrieb Horn

“Covid had a huge impact on our business. We have **more demand** that we can offer supply.”

## STEPHANE JACQ – Restaurant: Restaurant de l'hôtel les rives du ter

“Our customers mainly want to discover the **regional products** and there is absolutely no need for us to diversify our offers towards more exotic menu.”

## KAGAN SÜMEL – Company: Gorillas

“Food buying will change from **buy in bulk to buy less** and short shelf life items. Start-ups need to provide new solutions to support that convenience”



# Supply side respondents are highly impacted by Deglobalization of food industry

All four groups provided insights into **perceived changes** on their own as well as consumer behaviour by means of economic development

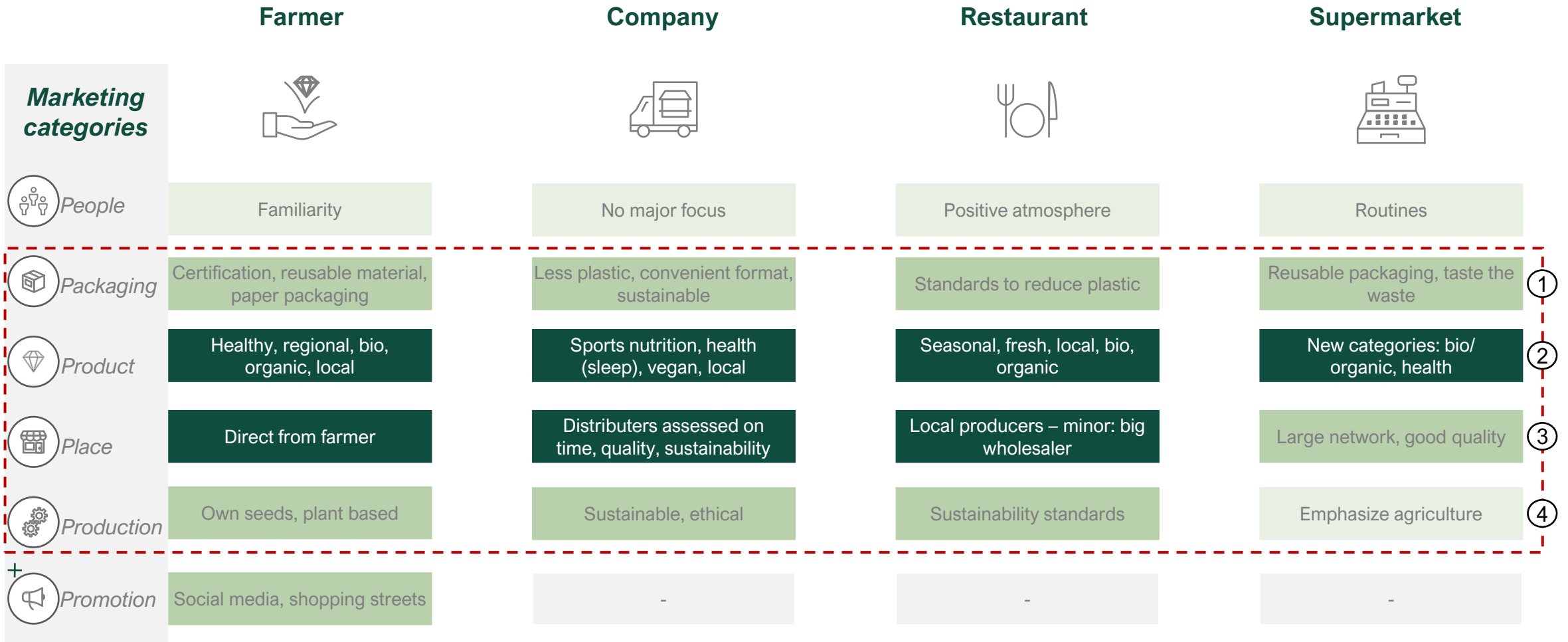
Topics	Farmer	Company	Restaurant	Supermarket
Globalization	<ul style="list-style-type: none"> <li>Exchange of <b>specialized material</b></li> <li>Inequality due to <b>different national regulations</b></li> </ul>	<ul style="list-style-type: none"> <li>Increased <b>interconnectedness</b> and <b>technological development</b> enable SMEs to compete</li> <li>Increased <b>pressure on big food companies</b> to adopt standards</li> <li>Rising online or even <b>online-only distribution</b></li> </ul>	<ul style="list-style-type: none"> <li>Heading towards <b>shorter supply-chains</b>, <b>local production</b> and <b>eating local</b></li> </ul>	<ul style="list-style-type: none"> <li><b>Selection of food products</b> from all over the world due to increased (sometimes overwhelming) international transport of goods and products</li> <li><b>Appreciation of broad-based taste</b> experiences of smells, tastes, experiences and cosiness</li> </ul>
Perceived Consumer trends	<ul style="list-style-type: none"> <li>Increased purchases <b>directly from farmers</b></li> <li>Growing offer of <b>vegetables</b></li> <li>Shift in perception and mindset of <b>generations</b> (Gen Z, Y and Baby Boomers focus: regional food production and sustainable products)</li> </ul>	<ul style="list-style-type: none"> <li>Expanding offer of <b>healthy nutrition</b> products</li> <li>Growing product segments: protein, vegan <b>food supplements</b> and <b>vitamins</b> for specific consumer desires: <b>good health</b>, <b>immune system support</b> and <b>sleep quality</b> are</li> <li>Implementation of zero-waste, ecological and clean <b>labels</b></li> </ul>	<ul style="list-style-type: none"> <li>Increased focus on <b>seasonality</b> and <b>freshness</b> on menu</li> <li>Importance of cooking in <b>sustainable</b> way</li> </ul>	<ul style="list-style-type: none"> <li>Rising focus on healthier, <b>low shelf-life products</b></li> <li>Large network of distributors</li> <li>Increased brand awareness and knowledge of products</li> <li>Growing trend towards brands that offer <b>biological/ organic and clean label</b></li> <li>Growing importance of <b>ethical</b> production</li> </ul>
Supply side trends & developments	<ul style="list-style-type: none"> <li>Implementation of <b>regenerative Agriculture</b> to assemble Humus</li> <li>Increased focus on company logo, <b>certification</b> and <b>packaging</b></li> </ul>	<ul style="list-style-type: none"> <li>Focusing on <b>minimizing waste of plastic</b> and packaging</li> </ul>	<ul style="list-style-type: none"> <li>Started <b>cooking local and offering traditional dishes</b></li> <li><b>Demanding transparency</b> of origin (e.g. import a chicken from Austria and processed in France have French label)</li> </ul>	<ul style="list-style-type: none"> <li>Increased concerns about and actions implementing <b>reusable items</b> to participate in movement of zero-waste</li> <li><b>Donating</b> unsold products to associations</li> </ul>

■ Indicating neutral impact of Globalization on food industry ■ Indicating positive impact of Globalization on food industry ■ Indicating negative impact of Globalization on food industry

References: Appendix: Excel file: Qualitative study & analysis: (Huebner, Loisel & Guddal 2021-1)

# Supply side underlines four relevant categories to investigate new trends

Highlighted changing trends are grouped into six marketing categories<sup>1</sup> & seem to illustrate varying importance levels along supply chain



Level of importance assumed on number of occasions mentioned: ■ High importance rating by respondents ■ Medium importance rating by respondents □ Low importance rating by respondents

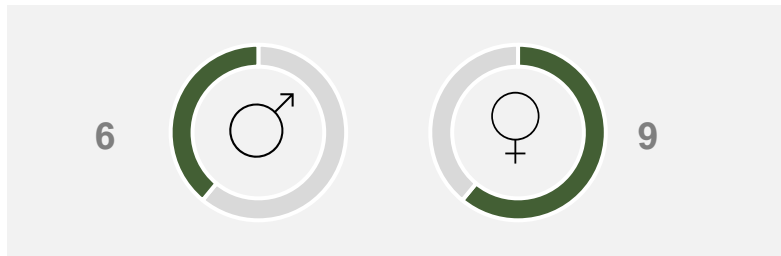
References: (1) (Afridi 2009,137-143), Appendix: Excel file: Qualitative study & analysis: (Huebner, Loisel & Guddal 2021-1)

# Demand side respondents profile consists of 15 persons with various backgrounds

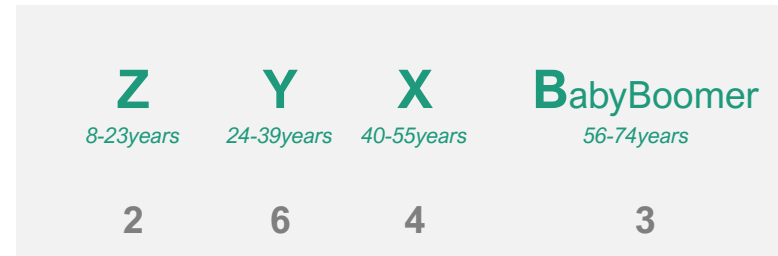
Respondent profile shows diverse interviewee group – most repeated words are aligned with supply side interviews

## RESPONDENT PROFILES

### GENDER



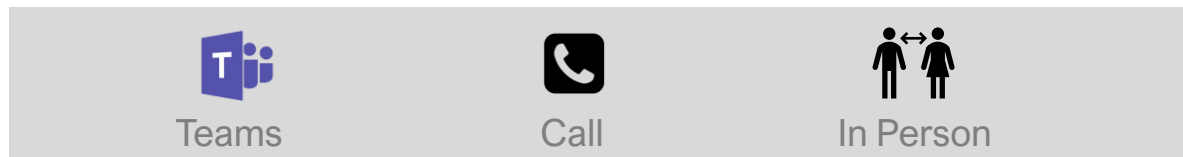
### GENERATION



### NATIONALITY



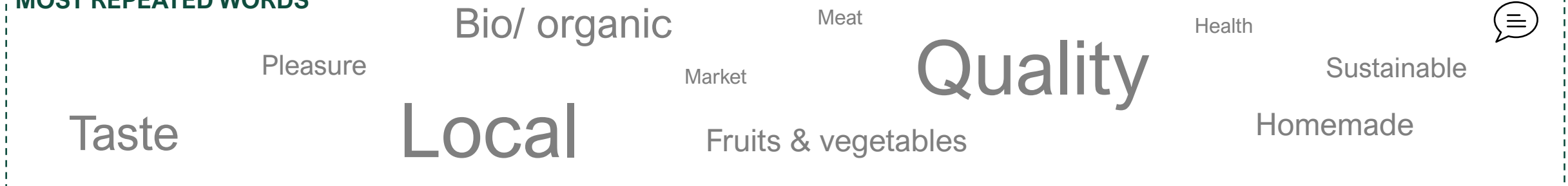
## EXECUTION METHOD



## TRANSCRIPTION METHOD



## MOST REPEATED WORDS



References: Appendix: Excel file: Qualitative study & analysis: (Huebner, Loisel & Guddal 2021-1)

# Demand side trend investigation is classified into five marketing categories (5Ps)

During interviews, three of five Ps showed high concerns – one additional “production” brought out – resulting in **4 focus Ps**

Marketing categories <sup>1</sup>	Most critical aspects mentioned during consumer side interviews								Level of change*			
People	Do you pay attention to working conditions of employees of companies you buy / order food from?		Yes	2	If scandal is in media,		2	No	11	probably	LOW	
Packaging	Not concerned about packaging	6	Concerned about packaging	8								HIGH ①
Product	Taste	Origin	Bio	Appearance	Fresh	Price	Seasonality	Vegan				HIGH ②
Place	Supermarkets	Category stores	Local markets	Farmers	Bio supermarket	Own gardening activity						HIGH ③
Production	During interviews, the term of <b>ethical production</b> was often mentioned. Concerns relating this topic were amongst others: Climate change, water usage and animal welfare										- ④	
Promotion	Not influenced	Friends	Social media	Magazines	TV ads							MEDIUM



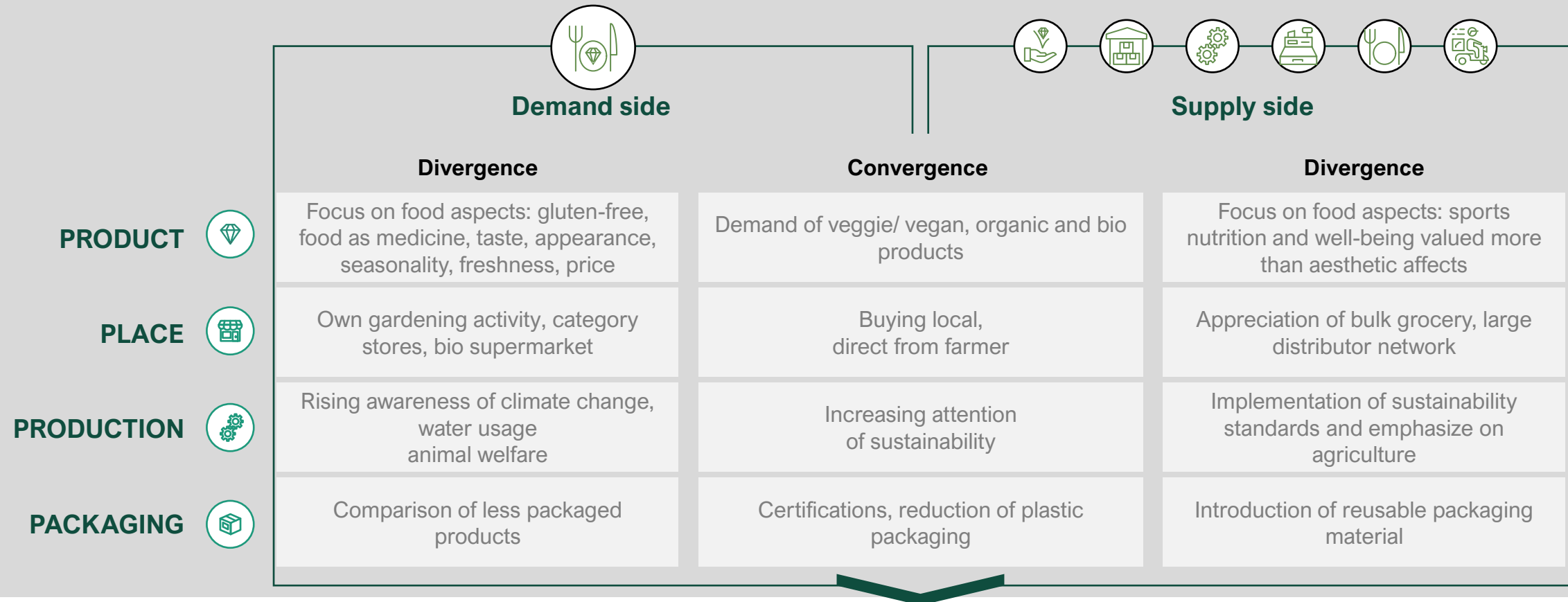
First senses of what are most important consumer trends led to decisions on investigating categories ① “**product**”, ② “**place**”, ③ “**packaging**” deeper through quantitative interviews. Furthermore, another category to investigate identified: Ethical food ④ “**production**” processes.

\*Level of change as estimate for emerging trend: ■ High change level by respondents ■ Medium change level by respondents ■ Low change level by respondents

References: (1) (Afridi 2009,137-143), Appendix: Excel file: Qualitative study & analysis: (Huebner, Loisel & Guddal 2021-1)

# Overview of supply and demand consensus highlights need for further research

Supply and demand side seem to have points of con- as well as divergence regarding evolving trends which need to be investigated



Comparison between trend con- and divergence on supply and demand side shows that some trends are aligned: supporting the fact that supply side is aware of some consumer behaviour changes. Other trend indicators are only mentioned on one side during interviews suggesting: **Trend importance needs further investigation** in order for businesses **to develop strategies responding to those trends.**

*\*Divergence points state that only one side (either demand or supply) mentioned trend – not that the other party does not care about trend*

# Qualitative prospection highlights relevance of topic of food industry Deglobalization

Investigated focus categories must be confirmed by quantitative analysis and answer following research questions

## IMPACT OF DEGLOBALIZATION

1. Does Globalization/ Deglobalization have an **impact on the food industry**?
2. Has Deglobalization raised **new trends going against Globalization** in the food industry?
3. What are **main drivers for changes** in food buying behavior?

## IMPACT ON BUSINESS STRATEGIES (based on redefined 4 Marketing Ps<sup>1</sup>)

1. Which



**PRODUCT**



**PLACE**

aspects are **most important** at the moment?

2. Which



**PACKAGING**



**PRODUCTION**

aspects have undergone the **heaviest change** during past 10 years?



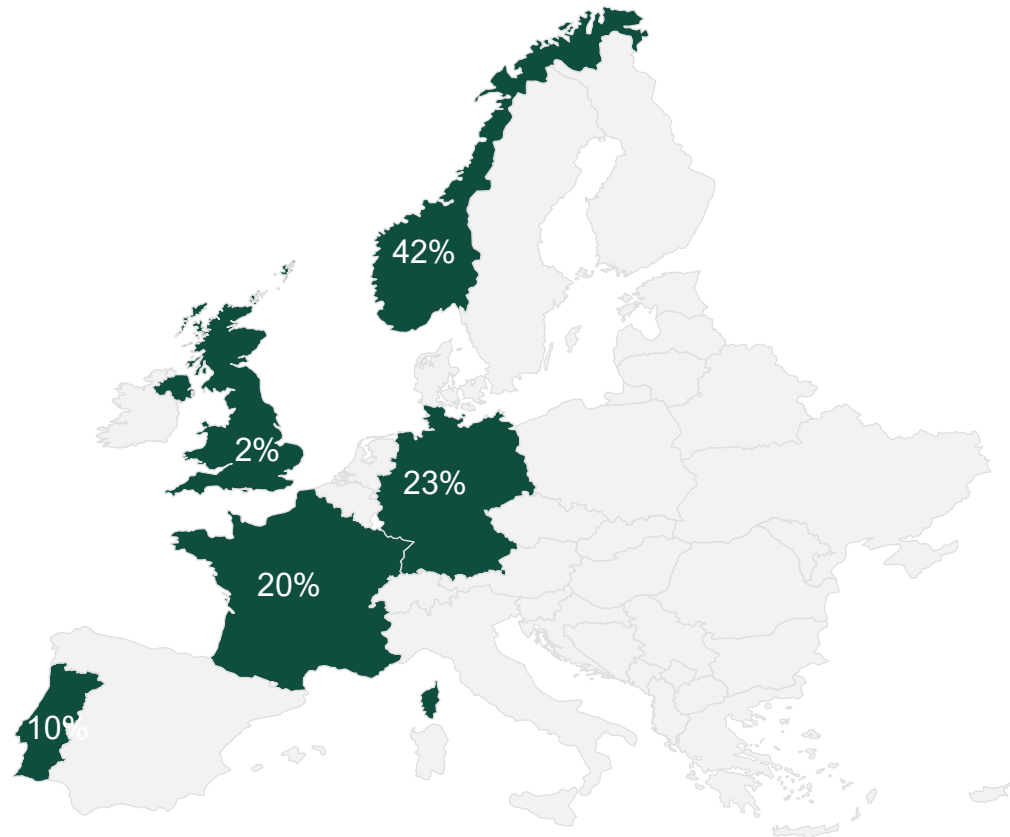
## 3.3 QUANTITATIVE VERIFICATION

Questionnaire is answered by more than **300 consumers** to **validate** trend projections and **deep-dive** into four main focus categories

# Survey respondents profile consists of diverse audience

More than 300 surveys were filled out within 20 days time frame in November 2020 using social media, mailing and word-of-mouth distribution methods

**327** responses from **11** different countries of residence were collected. 97% of respondents come from Europe...



## Demographics

### AGE



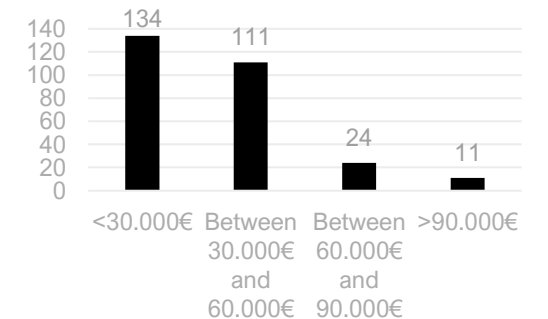
### GENDER



### OCCUPATION



### YEARLY NET INCOME



# Question tree visualizes respondents journey throughout questionnaire

Survey “Deglobalization of food industry” guided 327 respondents through **47 questions** concerning consumer food trends

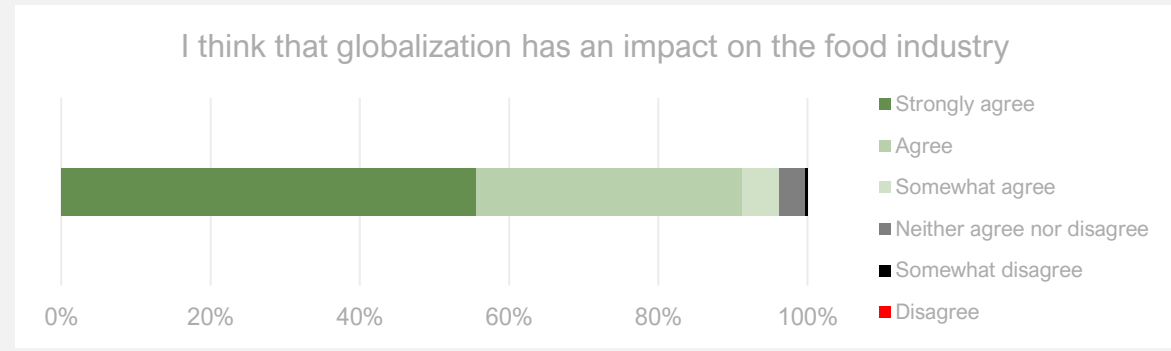


References: (Gillham 2008, 15-49), Appendix: Excel file: Survey (Huebner, Loisel & Guddal 2021-2), Qualtrics survey “Deglobalization of the Food Industry”

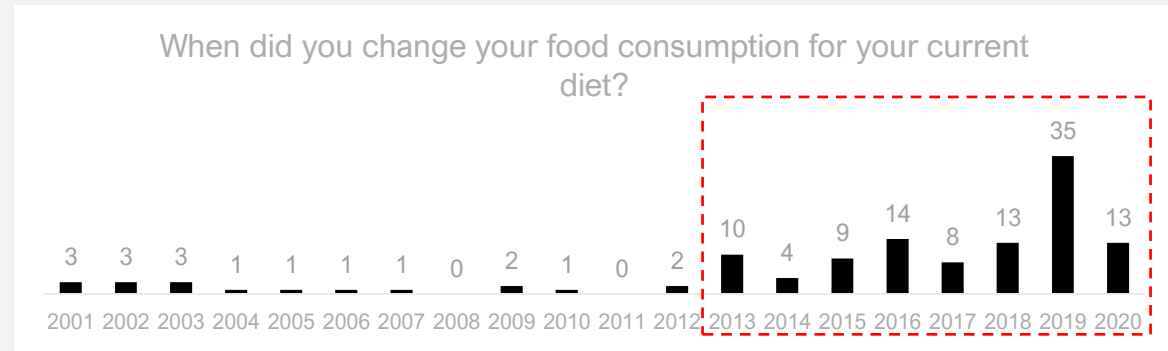
# Respondents evaluated impact of Deglobalization on food industry

Does Deglobalization have an **impact** on the food industry?

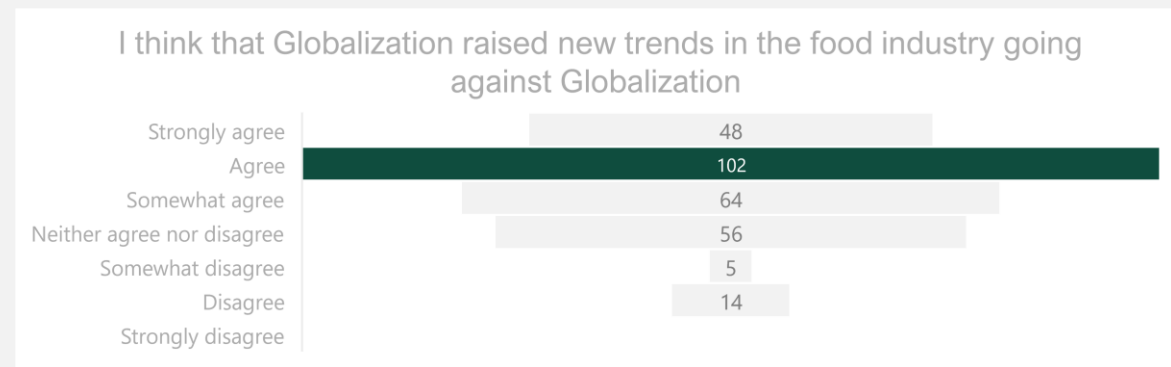
## 1. Globalization has an **impact** on the food industry



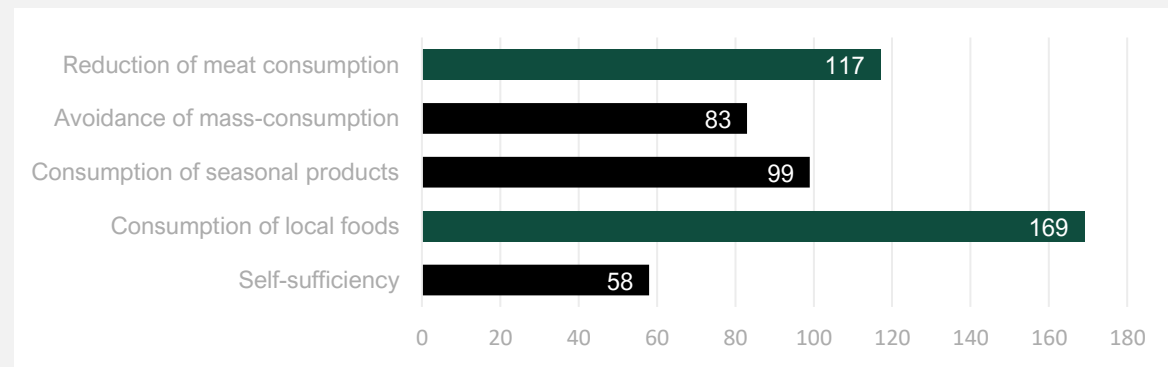
## 2. Consumers **changed their diets** within the Deglobalization phase more often than ever before (e.g. during Globalization phase)



## 3. Deglobalization **raised new trends** in the food industry



## 4. New trends recently raised within the food industry are going against Globalization and are **supporting Deglobalization**



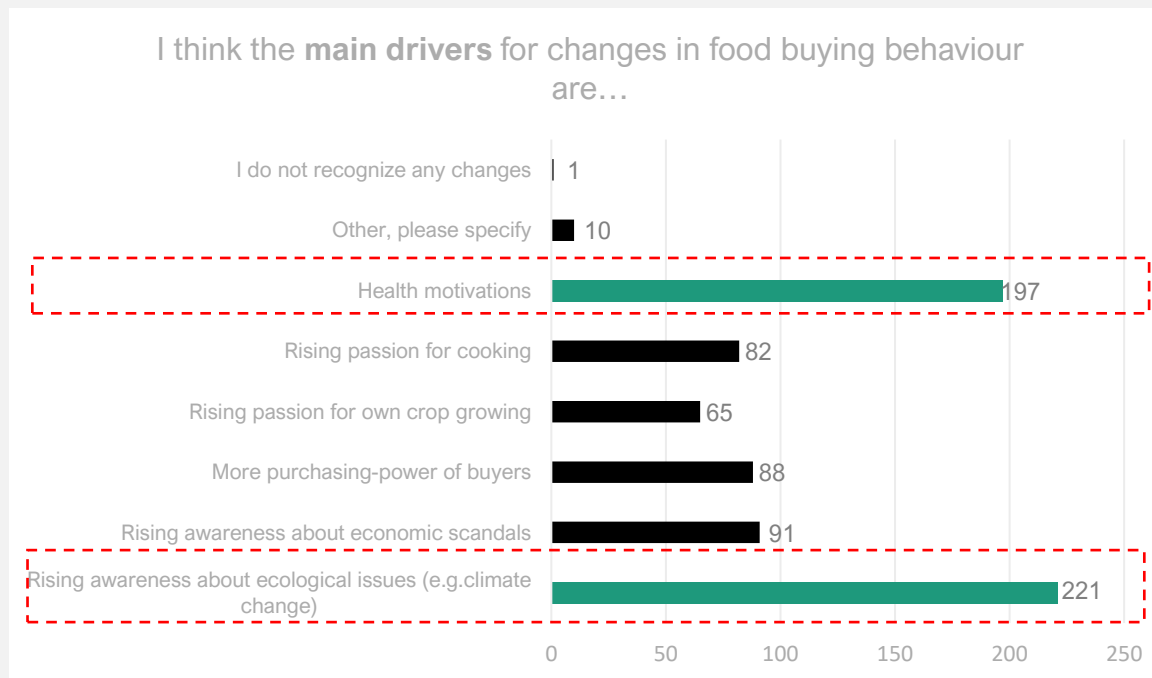
➤ **Yes! Deglobalization has an **impact** on the food industry and **raises new trends** going against Globalization.**

References: Appendix: Excel file: Quantitative data & analysis: Deglobalization of the Food Industry

# Drivers of raising trends result in changes of food consumption habits

What are **main drivers** for new trends resulting in changes in food buying behaviour?

## 1. **Health and ecological awareness** are **main drivers** for changes in food buying behaviour



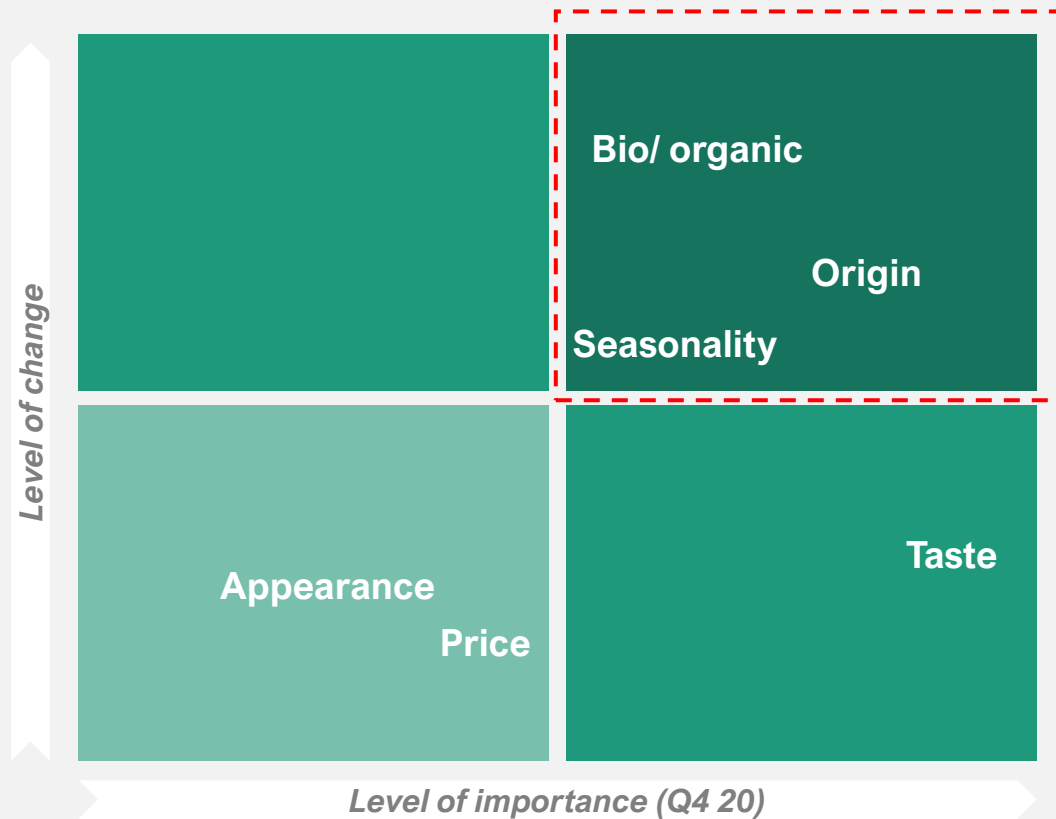
- Almost 100% of respondents recognize changes in food buying behaviour
- Respondents evaluated both; general and personal drivers for new trends resulting in changing food consumption behaviour – both levels coincide
- Health motivation and rising awareness about ecological issues are most relevant drivers for change as they are raised by majority of respondents

➤ **Main drivers for emerging trends are health motivations and rising awareness of ecological issues.**

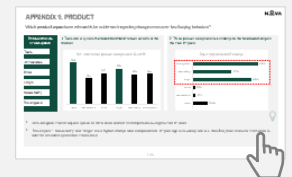
# Respondents state three strongly rising trends within category *product*

Which **product aspects** are relevant to be addressed regarding changes in consumer food buying behaviour?

1. Taste and origin are the most important product aspects at the moment – **seasonality, bio/ organic and origin** illustrate highest level of change and importance



- All investigated product aspects gained on importance and lost in unimportance during the past 10 years
- “Bio/ organic”, “Seasonality” and “Origin” show highest change rates compared from 10 years ago to nowadays and are, therefore, most critical for businesses to adopt to considering consumer trends
- “Taste” is very important for consumers at the moment. While having low level of change, stays important



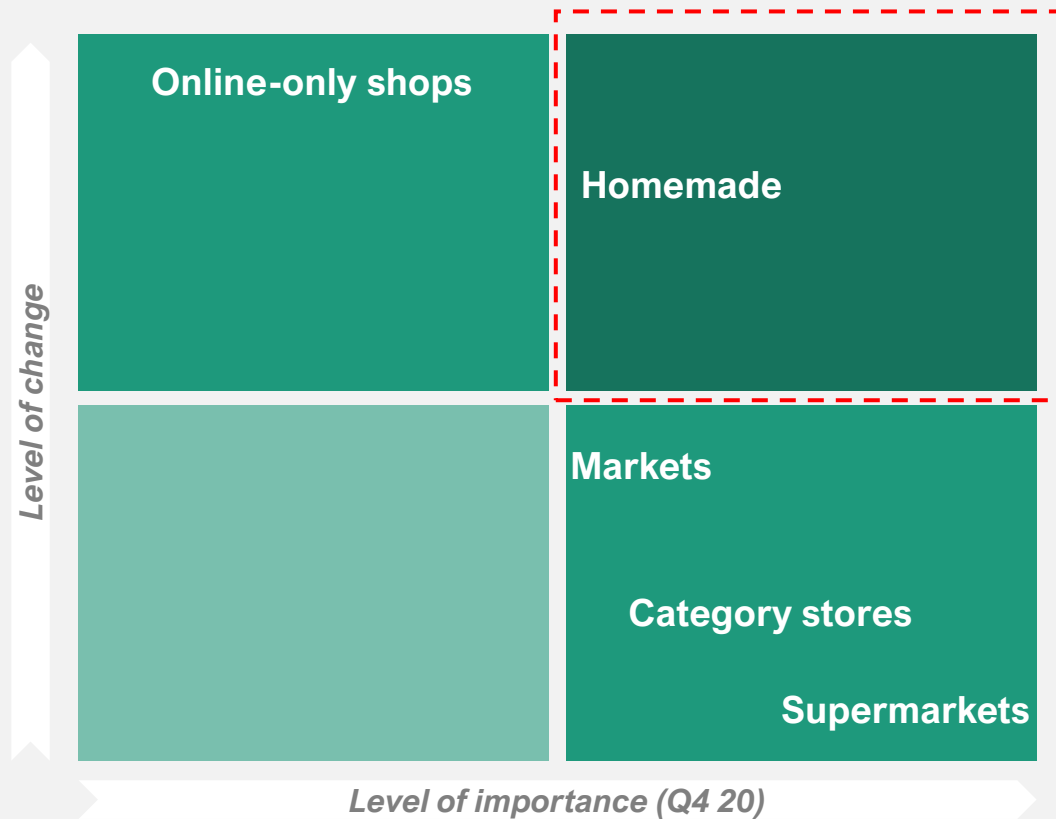
➤ Trends within category “product” manifest changing importance from “taste” to “**bio/ organic**”, “**seasonality**” and “**origin**”.

References: Excel file: Quantitative data & analysis: Deglobalization of the Food Industry, (Hambrick, MacMillan and Day 1982, 510-531), Appendix 1: Product

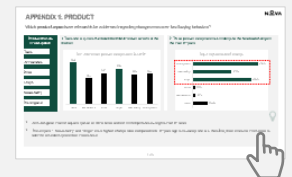
# Places for food acquisition indicate strong alteration towards self-sufficiency

Which **places to acquire food** are relevant to be addressed regarding changes in consumer food buying behaviour?

1. Supermarkets are the **most important and used** places to acquire food at the moment, **homemade** food and **online delivery** create highest business potential



- Homemade trend and online-only delivery have undergone the heaviest change in the past 10 years (accelerated by Covid-19)
- All places to acquire food show an increase in usage – representing an increase in source/ place diversity
- Supermarkets are still the most relevant place to buy food for consumers as more than 76% of respondents buy food in supermarkets
- However, supermarkets exhibit only 19% increase compared to homemade and online-only which show highest change rates during past 10 years



➤ Trends for “place” underline trend from buying at supermarkets to **homemade** and **online delivery**, reinforcing Deglobalization of food industry.

References: Excel file: Quantitative data & analysis: Deglobalization of the Food Industry, (Hambrick, MacMillan and Day 1982, 510-531), Appendix 2: Place

# Packaging rises immense awareness and concerns questioning convenient packing

Which **packaging interests** are relevant to be addressed regarding consumer food buying behaviour?

## 22%

Of the respondents were **concerned** about packaging **10 years ago**

↑52%

## 74%

Of the respondents are **concerned** about packaging **nowadays**

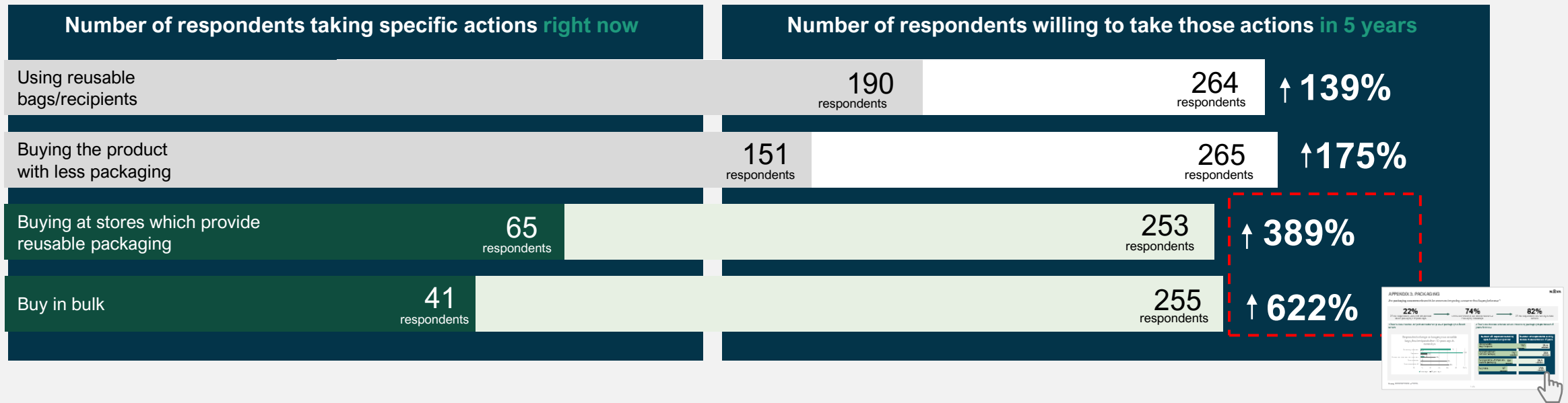
## &

## 82%

Of the respondents are **willing to take actions**



1. People have become very **concerned** about product packaging in different aspects and state concrete actions underlining packaging **importance in 5 years** from now



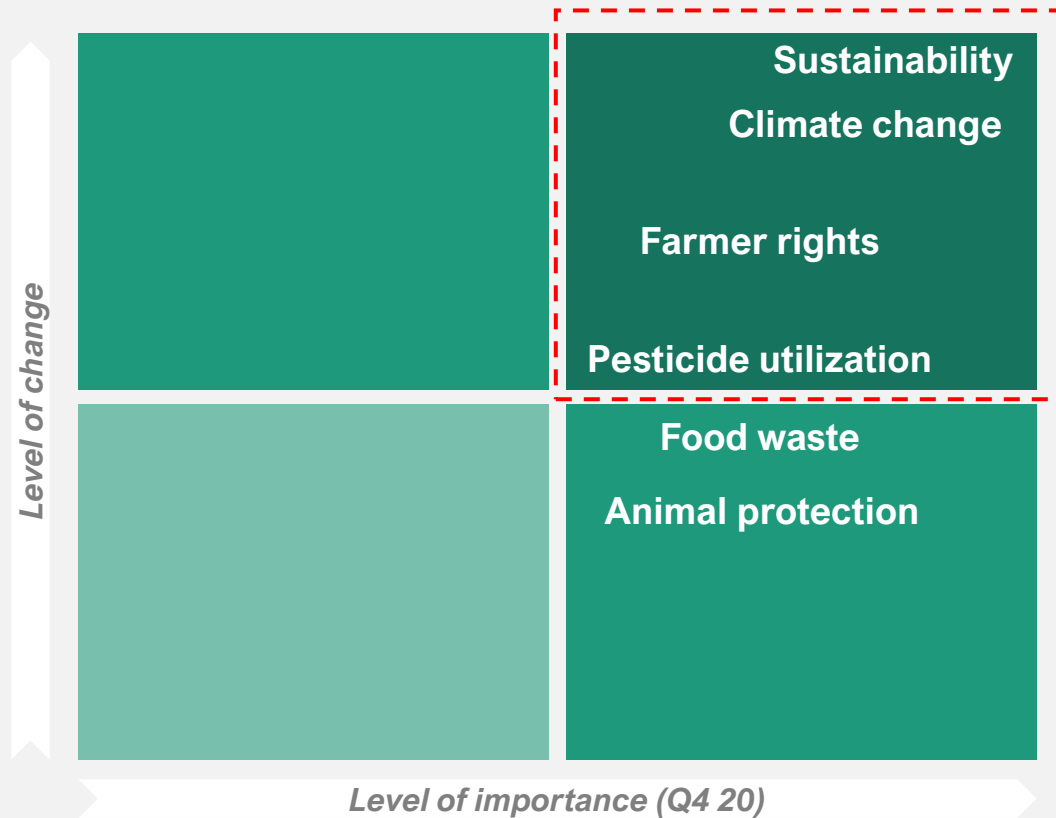
➤ Trends for “packaging” stress extreme change from low concerns towards concrete actions to combat unsustainable packing.

References: Excel file: Quantitative data & analysis: Deglobalization of the Food Industry, (Hambrick, MacMillan and Day 1982, 510-531), Appendix 3: Packaging

# Significant concerns determine future food *production* handling

Are food **production process concerns** relevant to be addressed regarding consumer food buying behaviour?

1. All production concerns raised immensely on importance and level of change. **Sustainability** and **climate change** indicate highest change rate and might, therefore, become most important to consider

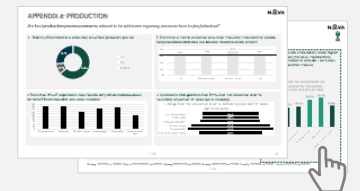


**64%**

Of the respondents are **concerned** about food production process

**>200%**

Positive change rate for each production concern over past ten years

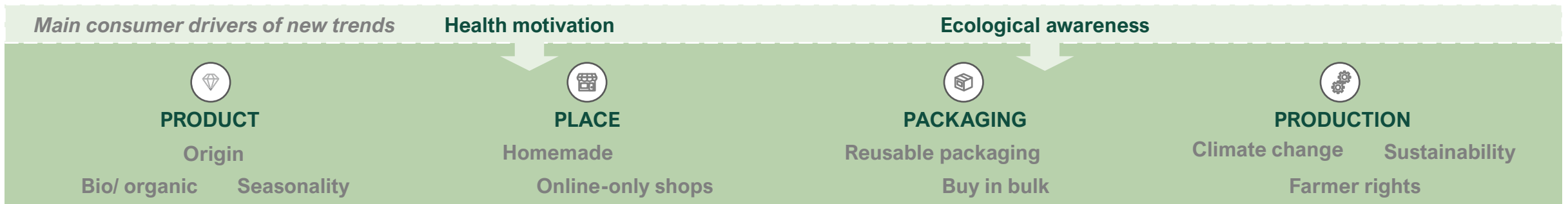


➤ “Production” is a high changing category with various concerns highly important to consumers and, therefore, might steer business strategies.

References: Excel file: Quantitative data & analysis: Deglobalization of the Food Industry, (Hambrick, MacMillan and Day 1982, 510-531), Appendix 4 & 5: Production

# Overview: Chapter 3

Which changing consumer trends shape the food industry?



# 05

## REFERENCES

# Attached files

## Chapter 3



### Excel files

1: Qualitative study & analysis

Huebner, Carolin., Loisel, Benjamin and Guddal, Torstein. *Qualitative prospection\_transcript* (Jan 04, 2021-1), distributed by Nova School of Business and Economics

2: Survey data analysis

Huebner, Carolin., Loisel, Benjamin and Guddal, Torstein. *Deglobalization of food industry* (Jan 04, 2021-2), distributed by Nova School of Business and Economics

3: Scenario forecast

Huebner, Carolin., Loisel, Benjamin and Guddal, Torstein. *Quantitative scenario forecast* (Jan 04, 2021-3), distributed by Nova School of Business and Economics



### Word document

Huebner, Carolin., Loisel, Benjamin and Guddal, Torstein. From global efficiency to local self-sufficiency report (Jan 04,2021), distributed by Nova School of Business and Economics



### Qualtrics survey “Deglobalization of the Food Industry”

[https://novasbe.az1.qualtrics.com/jfe/form/SV\\_cwoJ9XWjnHMj0Md](https://novasbe.az1.qualtrics.com/jfe/form/SV_cwoJ9XWjnHMj0Md)

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# 06

**APPENDIX**

# Limitations of our study

Four main limitations could be outlined

1. The fact that change of diets nowadays is compared diets and trends 10 years ago, could be biased as more recent events are more present in our mind
2. The time span of investigation – executing interviews during Covid-19 phase might have impacted qualitative as well as quantitative measures as respondents might have dealt with e.g. mental stress
3. Selection of interview partners – 13 supply-side interviews might not be enough to represent picture of food supply-chain
4. Number of respondents – most respondents come from either Germany, France or Norway and might not represent enough insights to develop a general quantitative survey

# Semi-structured interview guide - *producer*

Number	Topic	Question Topic	Questions
1	Icebreaker	Role of interviewer and interviewee	What is your position?
		Topic introduction (globalization & food industry)	What does food mean to you? Does food play an important role in your life? (Do you like to go out? Order food? – Did that change over time?)
2	Main part 1: <b>Globalization</b>	Perception of globalization	How would you define globalization? / What does globalization mean to you? If you need to decide, would you say that globalization is good or bad?
			Do you think that the food industry is affected by globalization?
			Do you think that globalization / reverse globalization impacts your company / restaurant / supermarket?
3	Main part 2: <b>Consumer trends</b>  focuses on food consumption trends (other) developments  (more concerned about the Ps in specific)	<b>Place</b> – Where to buy: Supplier selection – Which market to sell to Online order – Online drive-in – Local stores – Big company / supermarket chains	Where do you buy the products you process?
			How do you select your retailer?
			Where do you distribute your products? (Did that change over time / did Covid had an impact on the change?)
		<b>Product offering</b> – Portfolio management selection – Brand selection – Product selection	How do you compose / recompose your product portfolio/ menu?
			Did the focus of brands you choose change over time?
			What are the top food product trends atm?
			(Do you evaluate those as short-term trends or long-lasting?)
			Do you think that globalization is influencing the products / brands you offer?
			Other
<b>Packaging</b> – Non-Plastic – Fair-trade – Reusable	Are you concerned about product packaging?		
	Do you evaluate your company / restaurant / supermarket as sustainable? Why or why not?		
	Do you think that packaging is important to customers / consumers?		

		<b>Production</b> – sustainable	Which emphasis do you place on your food production?
			Which influence does globalization / deglobalization have on your way of production?
		<b>People</b> – Salary and bonuses – Employee environment – Working conditions – Extra employee services	Do you pay attention to working conditions of your employees?
			Other
	3	Addition - relationship between Globalization & consumer trends	Do you see any relationship between emerging consumer trends (might also be due to Covid) & the current level of Globalization?
			How could emerging (lasting) consumer trends impact your business development (in terms of globalization)?
	4	End	Closing questions
			If you could change two things in the food industry (regardless of costs) what would you change?
		Other aspects	Are there any other aspects you would like to add?

# Semi-structured interview guide - consumer

Number	Topic	Question Topic	Questions
1	Icebreaker	Role of interviewer and interviewee	<p>What does food mean to you?</p> <p>Do you like to go out? Order food? - Did that change?</p> <p>Does food play an important role in your life?</p>
2	Main part - focuses on food consumption trends (other) developments  (more concerned about the Ps in specific)	<p><b>Place</b> - Where to buy?</p> <ul style="list-style-type: none"> <li>- Store selection (local farmer vs. big supermarket chain)</li> <li>- Buying frequency. How often to buy?</li> </ul> <p><b>Product</b> - Food trends – Eating - What to buy? Product selection</p> <ul style="list-style-type: none"> <li>-GMO modified</li> <li>-No sugar</li> <li>-Organic</li> <li>-High protein</li> <li>-Vegetarian</li> <li>-Vegan</li> </ul> <p><b>Packaging</b></p> <ul style="list-style-type: none"> <li>- Non-Plastic</li> <li>-Fair-trade</li> <li>-Reusable</li> </ul>	<p>Where do you buy your food? And why do you decide to buy it there?</p> <p>Did the place / store you buy your food change over the time?</p> <p>What kind of food do you buy most often?</p> <p>(did that change over time?)</p> <p>What are the most important product aspects / indicators to you? (did that change over time?)</p> <p>Overall: Do you see any emerging trends in the food industry?</p> <p>(Do you evaluate those as short-term trends or long-lasting?)</p> <p>Are you concerned about product packaging?</p> <p>(Have you always been aware of that?)</p> <p>Does the product packaging influence your decision-making process?</p>

		<p><b>People</b></p> <ul style="list-style-type: none"> <li>-Importance of customer service provided</li> </ul> <p>Most important aspect that influences your buying decision. Did that change in the past years?</p>	<p>Do you pay attention to working conditions of employees of companies you buy / order food from?</p> <p>In general: what are your major concerns to make buying decisions? - Did that change over time? /</p>
3	Addition - Globalization	<p><b>Perception</b> of globalization</p> <p><b>Impact</b> of globalization</p> <p><b>Impact</b> of Covid</p>	<p>How would you define globalization? <i>(What comes into your mind when you hear globalization?)</i> / What does globalization mean to you? If you need to decide, would you say that globalization is good or bad?</p> <p>Do you think that the food industry is affected by globalization?</p> <p>Do you think that reverse globalization is accelerated by Covid19? Did Covid19 change your action / perception in terms of food buying / consumption behaviour?</p>
4	End	Closing questions	<p>If you could change two things in the food industry (regardless of costs) what would you change?</p>
		Other aspects	<p>Are there any other aspects you would like to add?</p>

# Different national attitudes towards Globalization are detected

During investigation, some countries seem to focus on Globalization advantages, whereas other nationalities fear loss of identity



## GLOBALIZATION

Globalization is described by the respondents as the **opening up of borders** allowing acceleration in trades exchanges of goods and services between countries

Overall interviewees agree that Globalization presents both positive and negative implications

Advantages highlighted throughout the interviews mention the opening up of border, bringing more competition bringing prices down, the maintenance of peace thanks to trade agreements

Disadvantages from Globalization perceived by the respondents concern the current climate crisis, the loss of identity and culture but also the impacts on SMEs as prices are brought down by the giants of each sector

### SIEGLINDE, GERMANY

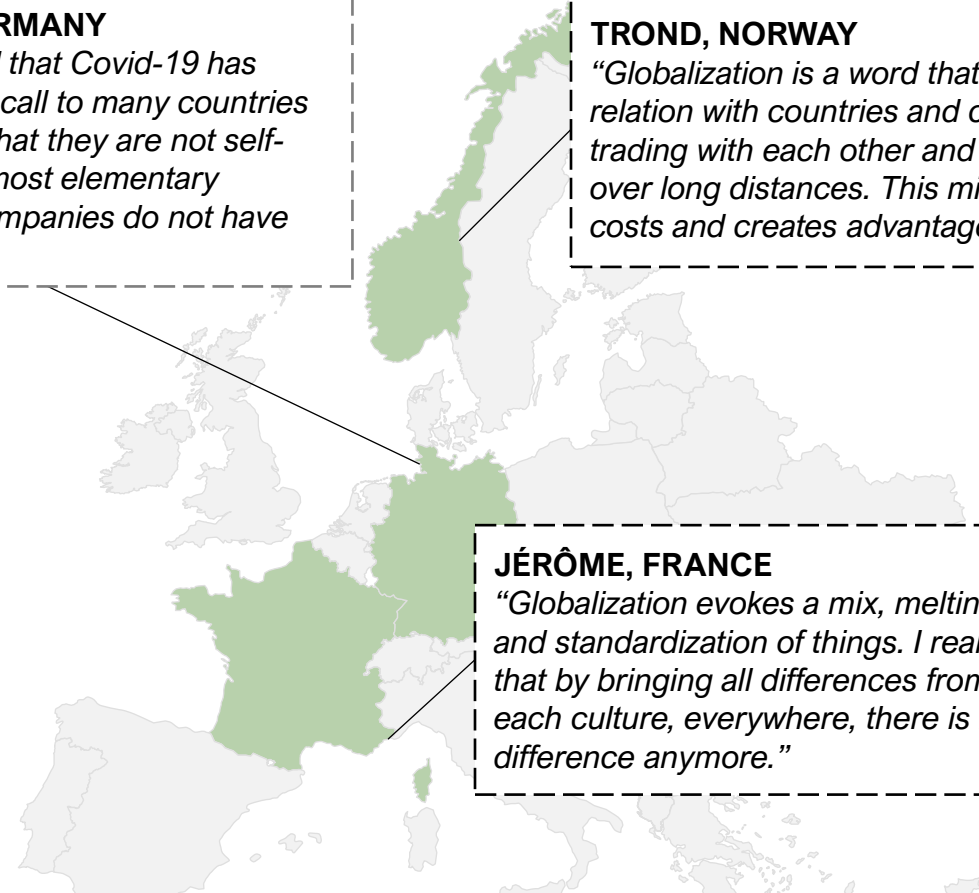
*« I am convinced that Covid-19 has given a wake-up call to many countries and companies that they are not self-sufficient in the most elementary practices and companies do not have production. »*

### TROND, NORWAY

*“Globalization is a word that is in relation with countries and companies trading with each other and production over long distances. This minimizes costs and creates advantages.”*

### JÉRÔME, FRANCE

*“Globalization evokes a mix, melting pot and standardization of things. I realize that by bringing all differences from each culture, everywhere, there is no difference anymore.”*



Norwegian interviewees are looking at Globalization with a bigger picture emphasizing on the advantages on the economy and access to new resources. German respondents care more about the impact of Globalization on Earth and its relationship with global warming. Whereas French people seem more reluctant to Globalization because of its impact on their identity, culture and habits.

# Feedback from survey participants/ respondents highlight relevance of topic

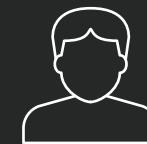
During our interviews and survey distribution, respondents showed high interest and raised concerns about Deglobalization of food industry

Hallo Kathrin, super Umfrage, tolles Thema für eine Masterarbeit, das kannst du bitte weitergeben vG  
Annette

Hej Caro, sehr interessant und wichtig! Die Auswertung würde ich gern sehen. Finde das total spannend, wei ich mich schon lange mit all diesen Fragen und Aspekten auseinandersetze und manchmal an den Antworten verzweifle

Very nice structured!

Done, coole Umfrage!  
War interessant das mal zu reflektieren



# APPENDIX 1: PRODUCT

Which **product aspects** are relevant to be addressed regarding changes consumer food buying behaviour?

## Product trends investigated:

Taste

Appearance

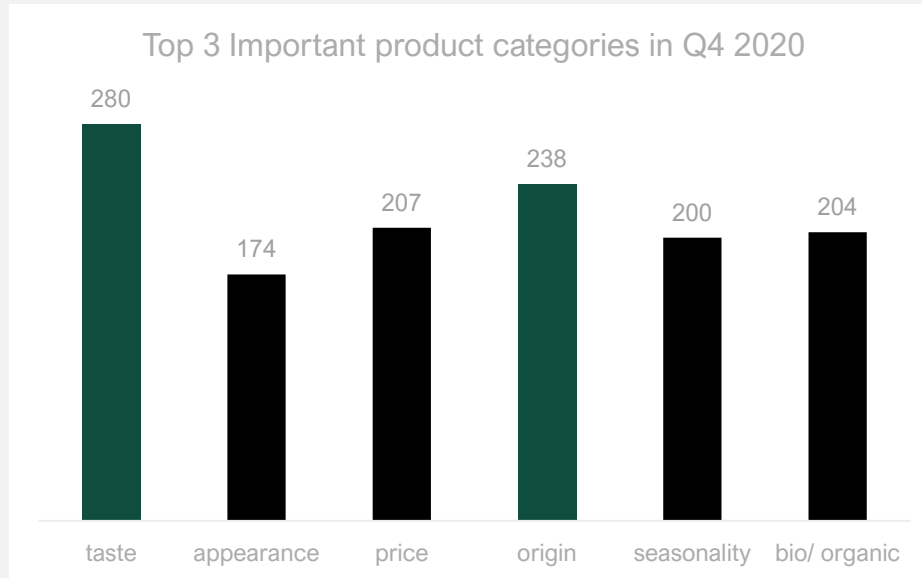
Price

Origin

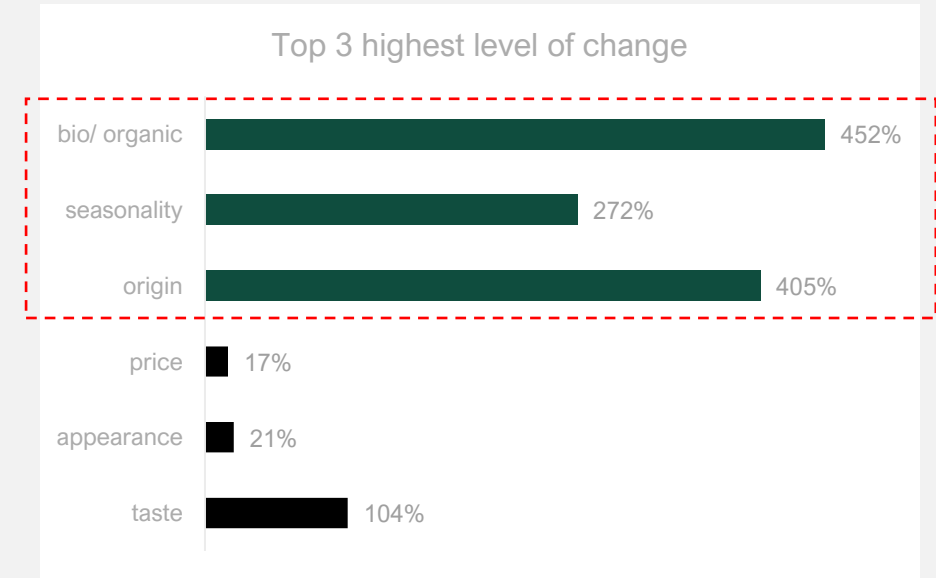
Seasonality

Bio/ organic

1. Taste and origin are the **most important** product aspects at the moment



2. Three product categories have undergone the **heaviest change** in the past 10 years



All investigated product aspects gained on importance and lost in unimportance during the past 10 years

“Bio/ organic”, “Seasonality” and “Origin” show highest change rates compared from 10 years ago to nowadays and are, therefore, most critical for businesses to adopt to considering consumer preferences



# APPENDIX 2: PLACE

Which **places to acquire food** are relevant to be addressed regarding changes consumer food buying behaviour?

## Food acquisition places investigated:

Supermarkets

Category stores

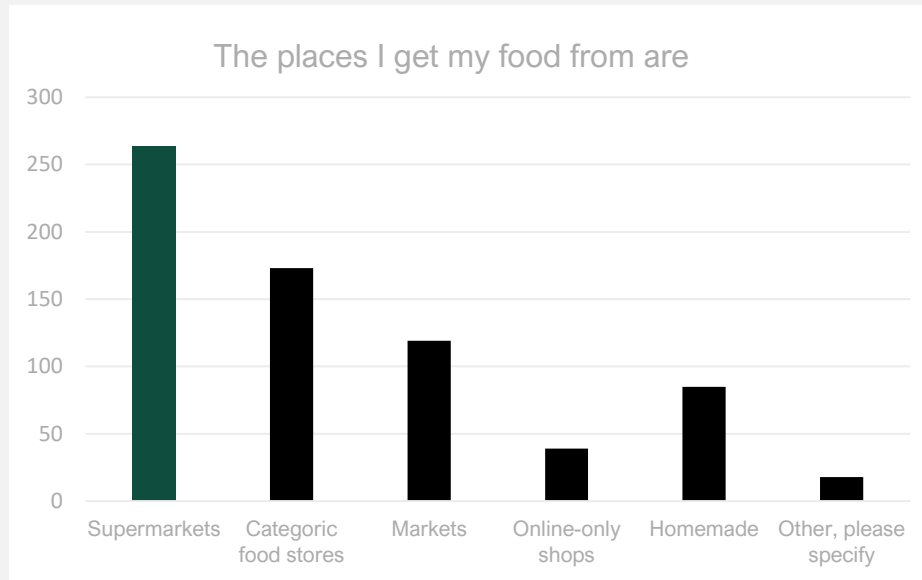
Online-only

Homemade

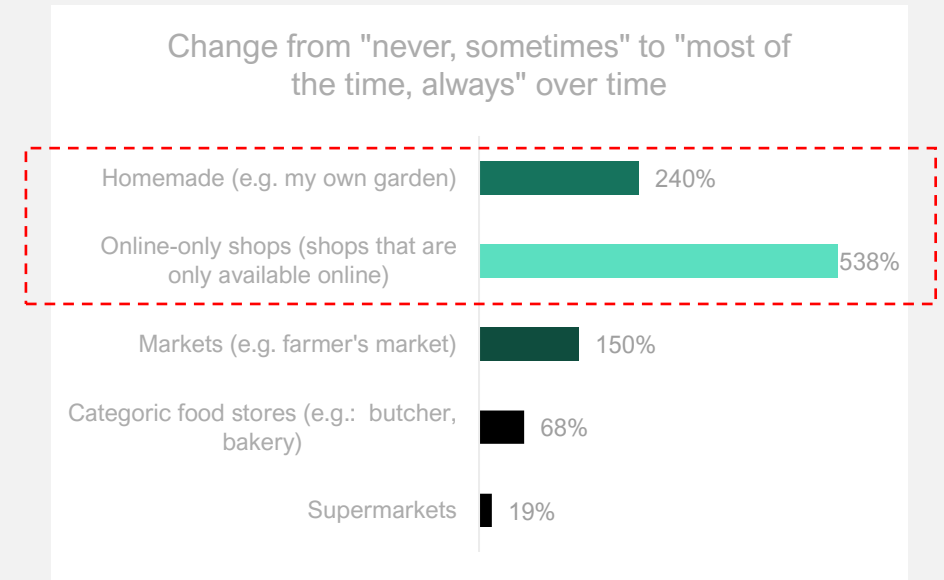
Seasonality

Bio/ organic

1. Supermarkets are the **most important/ used** places to acquire food at the moment



2. **Homemade** trend and **Online-only** delivery have undergone the **heaviest change** in the past 10 years (accelerated by Covid-19)



☛ All places to acquire food show an increase in usage – showing an **increase in source/ place diversity**

☛ **Supermarkets** are still the **most relevant place** to buy food for consumers as more than 76% of respondents buy food in supermarkets.

☛ However, supermarkets exhibit only 19% increase compared to **homemade and online-only** which show **highest change** rates during past 10 years. Therefore, these are most critical for businesses to adopt to considering consumer preferences



# APPENDIX 3: PACKAGING

Are **packaging concerns** relevant to be addressed regarding consumer food buying behaviour?

**22%**

Of the respondents were **not concerned** about packaging **10 years ago**

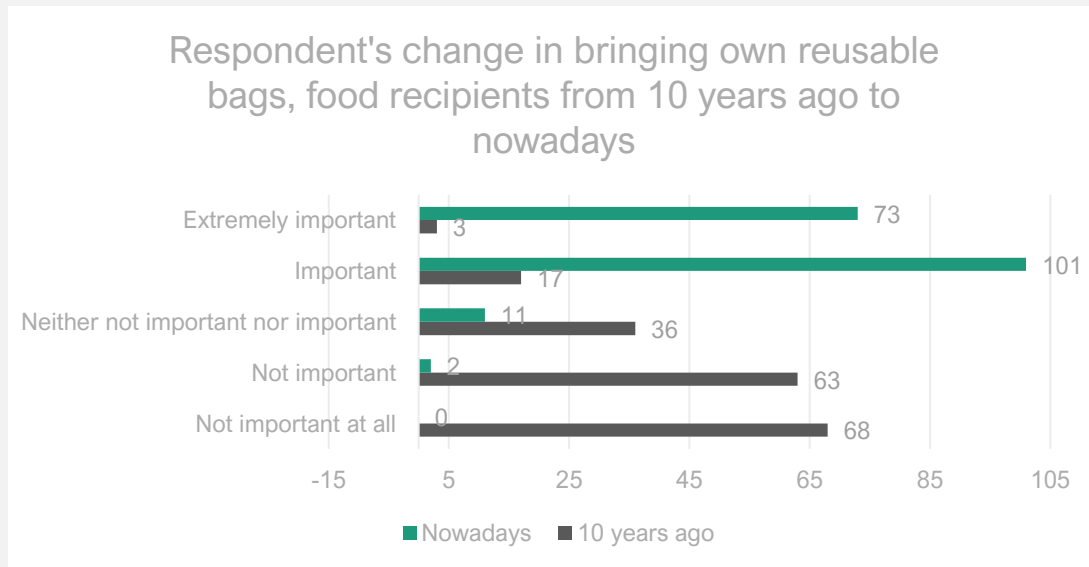
**74%**

Of the respondents are **concerned** about packaging **nowadays**

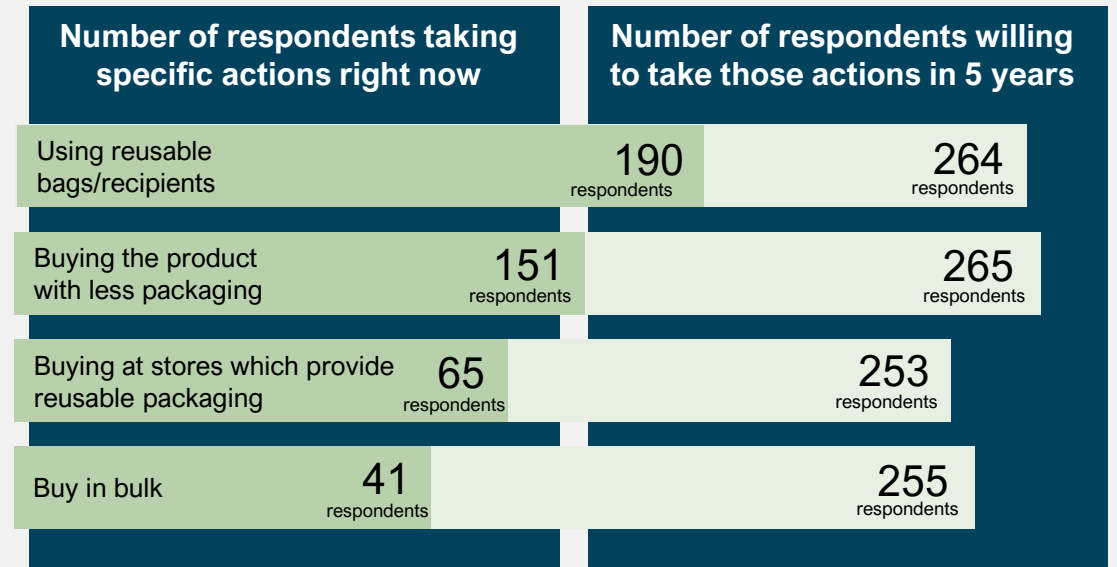
**82%**

Of the respondents are **willing** to take actions

1. People have become very **concerned** about product packaging in different aspects



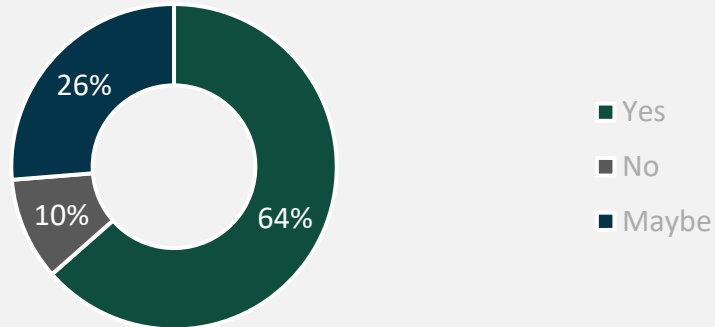
2. Respondents state concrete actions underlining packaging **importance in 5 years** from now



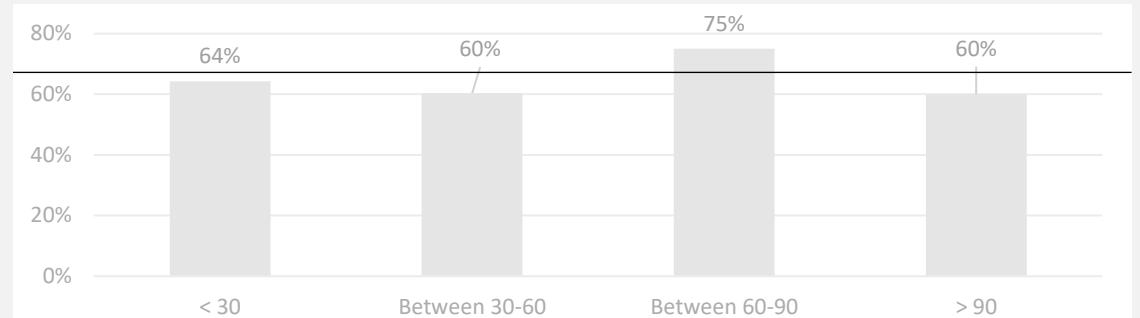
# APPENDIX 4: PRODUCTION

Are food **production process concerns** relevant to be addressed regarding consumer food buying behaviour?

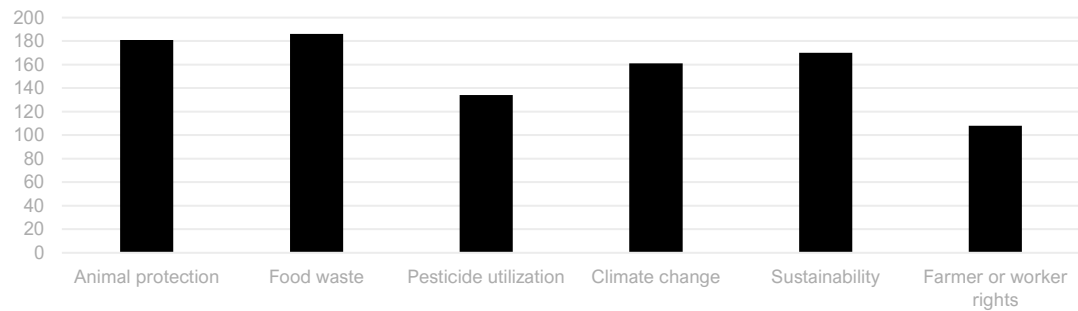
## 1. Majority of respondents is concerned about food production process



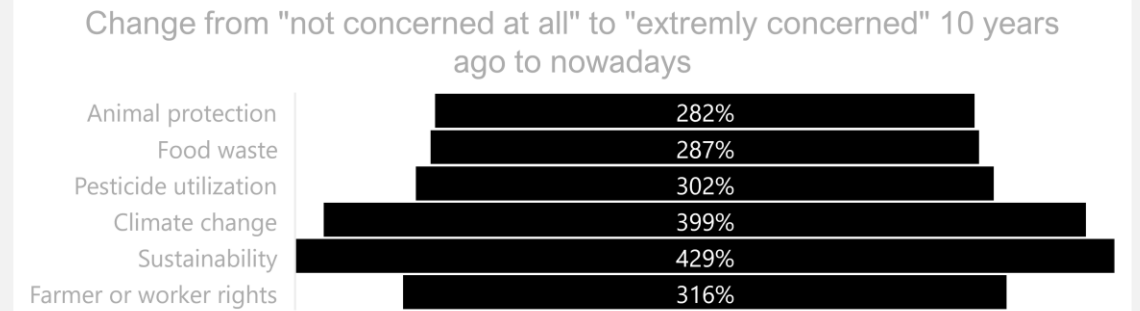
## 2. Proportion of people concerned about food production processes per **income** categories **does not show a link** between income level and concern



## 3. More than 30% of respondents have become **very concerned about** each impacts of food **production** processes nowadays



## 4. All concerns changed more than 200% from "not concerned at all" to "extremely concerned" 10 years ago to nowadays



# APPENDIX 5: PRODUCTION



Are food production process concerns relevant to be addressed regarding consumer food buying behaviour?

## Animal protection



>180

## Food waste



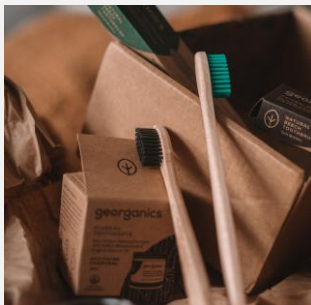
>180

## Pesticide utilization



>130

## Sustainability



>180

## Farmer rights



>100

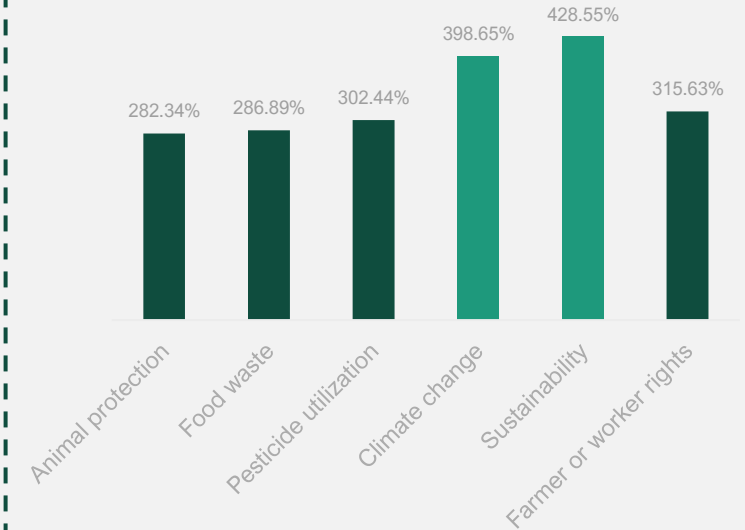
## Climate change



>160

1. Climate change and sustainability reveal highest change rates and, therefore, become more critical for businesses to consider – especially within food production process

Change from "not concerned, not concerned at all" to "concerned, extremely concerned" over time



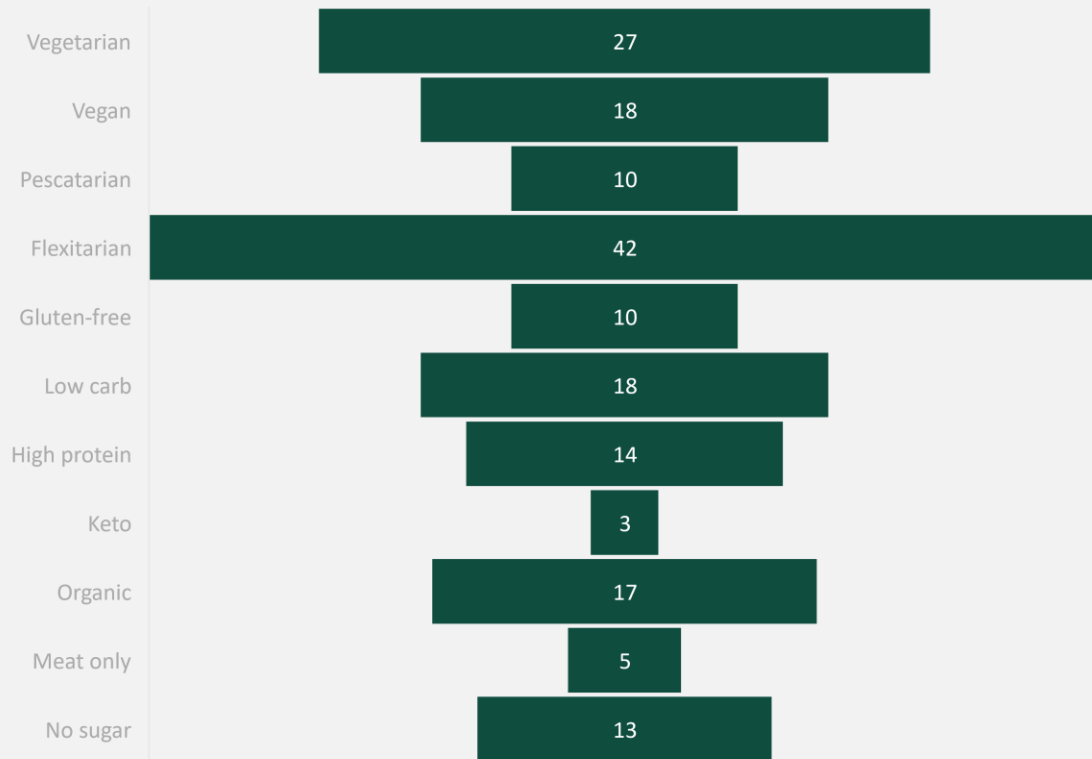
# SURVEY – Respondents profile



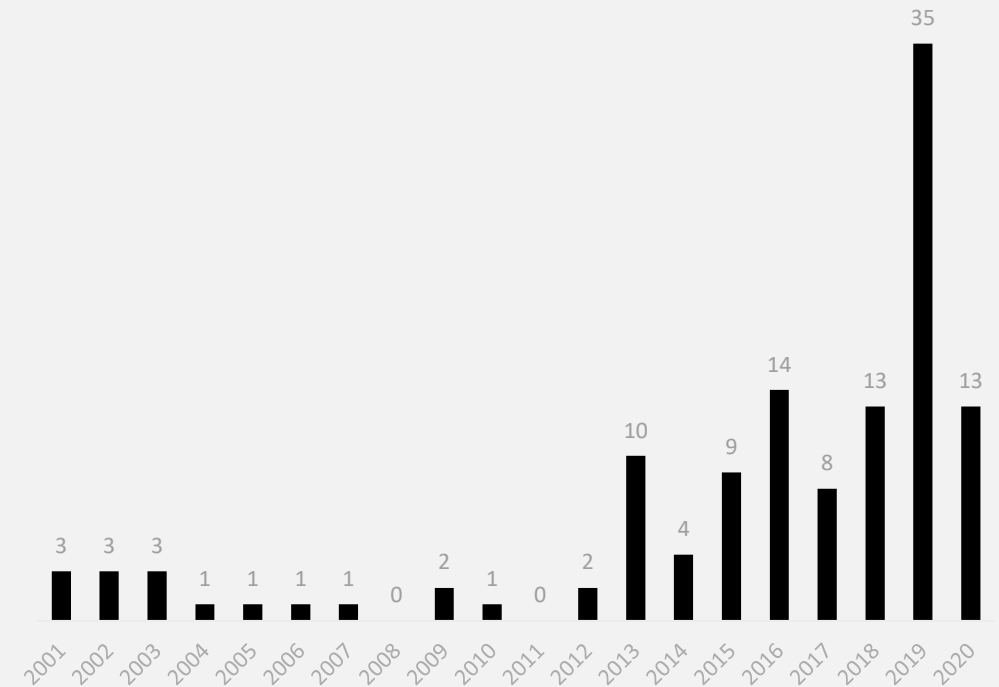
# Quantitative survey – Respondents diet portfolio



### Respondents diet portfolio

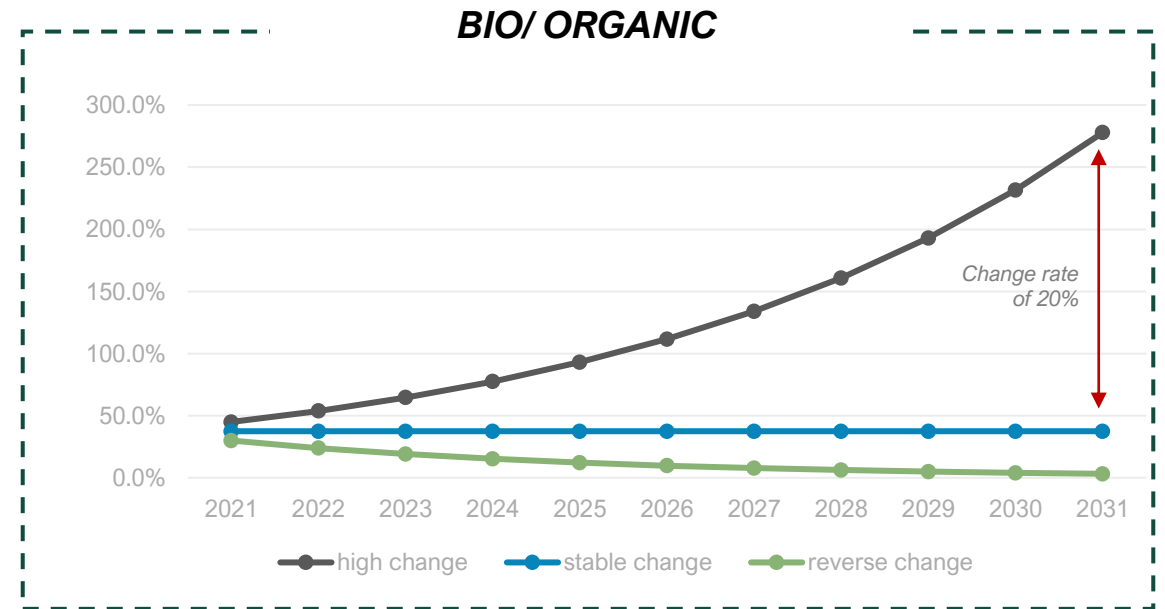
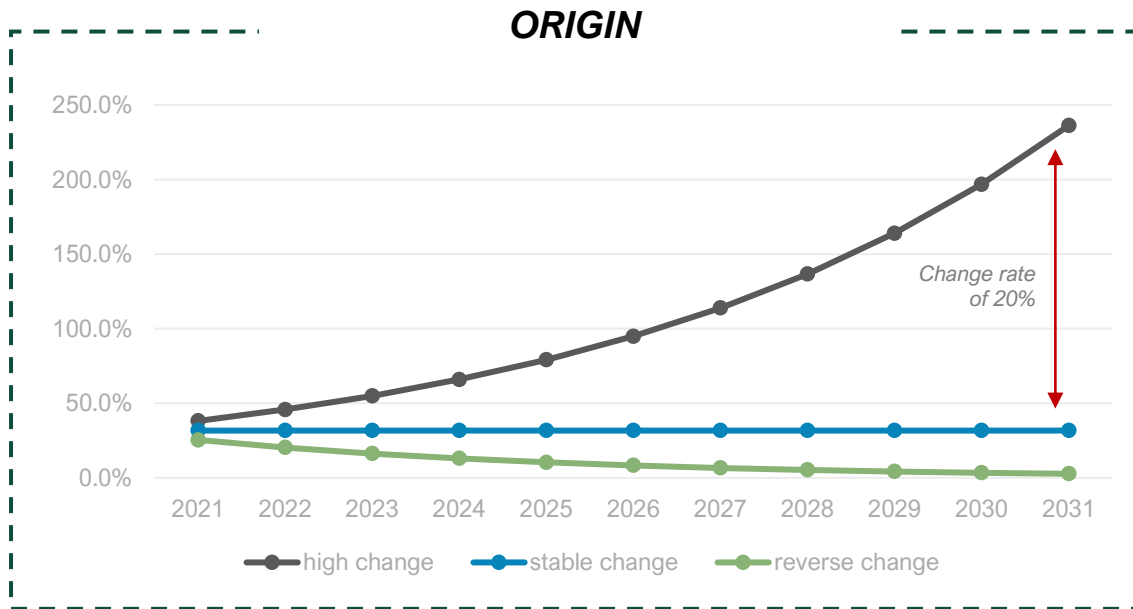


### When did you change your food consumption for your current diet?



# Focus category “product” displays major importance change trends

Trends “origin” and “bio/ organic” are expected to raise highest importance increase within next 10 years



CURRENT AVERAGE IMPORTANCE CHANGE<sup>1</sup>

**31.8%**

EXPECTED AVERAGE IMPORTANCE INCREASE<sup>2</sup>

**236.3%**

CURRENT AVERAGE IMPORTANCE CHANGE<sup>1</sup>

**37.4%**

EXPECTED AVERAGE IMPORTANCE INCREASE<sup>2</sup>

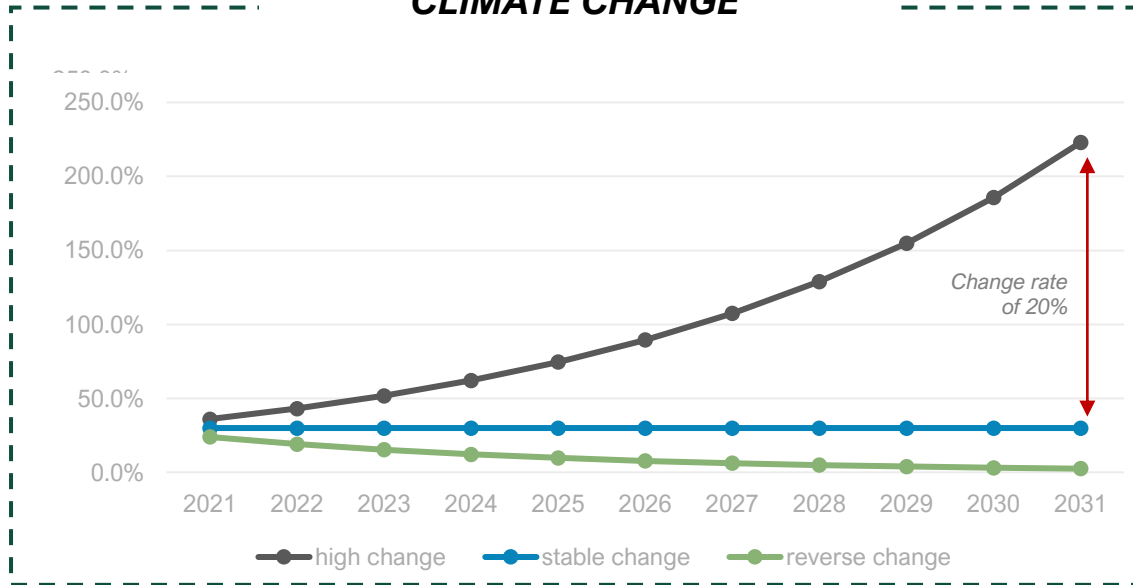
**277.9%**

References: (1) refers to average importance increase during past 10 years, (2) refers total change increase next 10 years – based on 20% importance increase, Excel file: Huebner, Loisel & Guddal 2021-3.

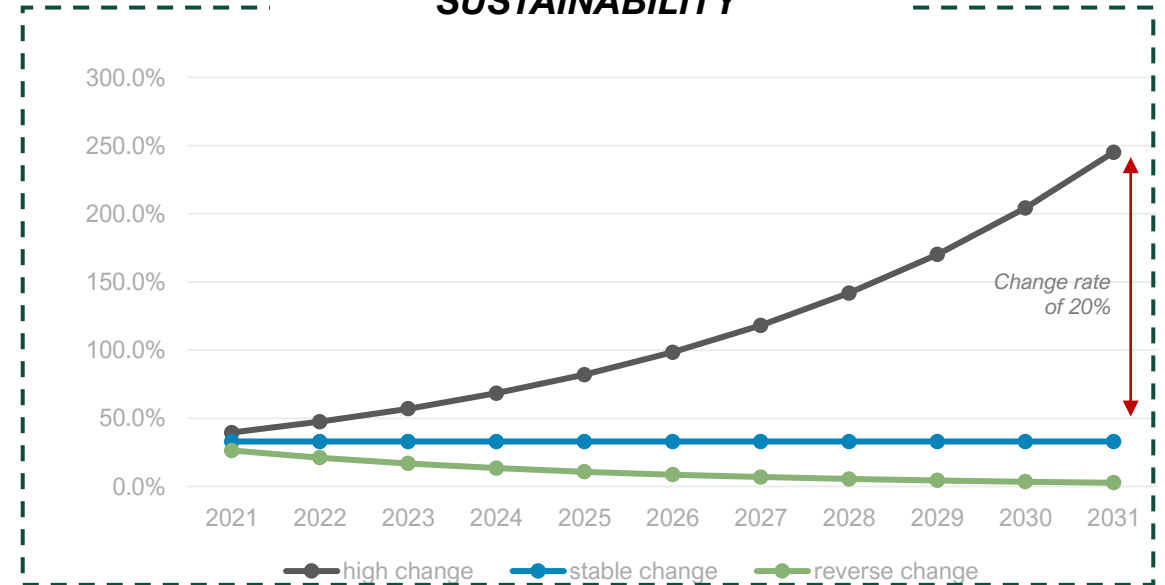
# Focus category “production” displays major importance change trends

Trends/ awareness concerns “climate change” and “sustainability” are expected to raise highest importance increase within next 10 years

**CLIMATE CHANGE**



**SUSTAINABILITY**



CURRENT AVERAGE IMPORTANCE CHANGE

**30.0%**

EXPECTED AVERAGE IMPORTANCE INCREASE

**222.9%**

CURRENT AVERAGE IMPORTANCE CHANGE

**33.0%**

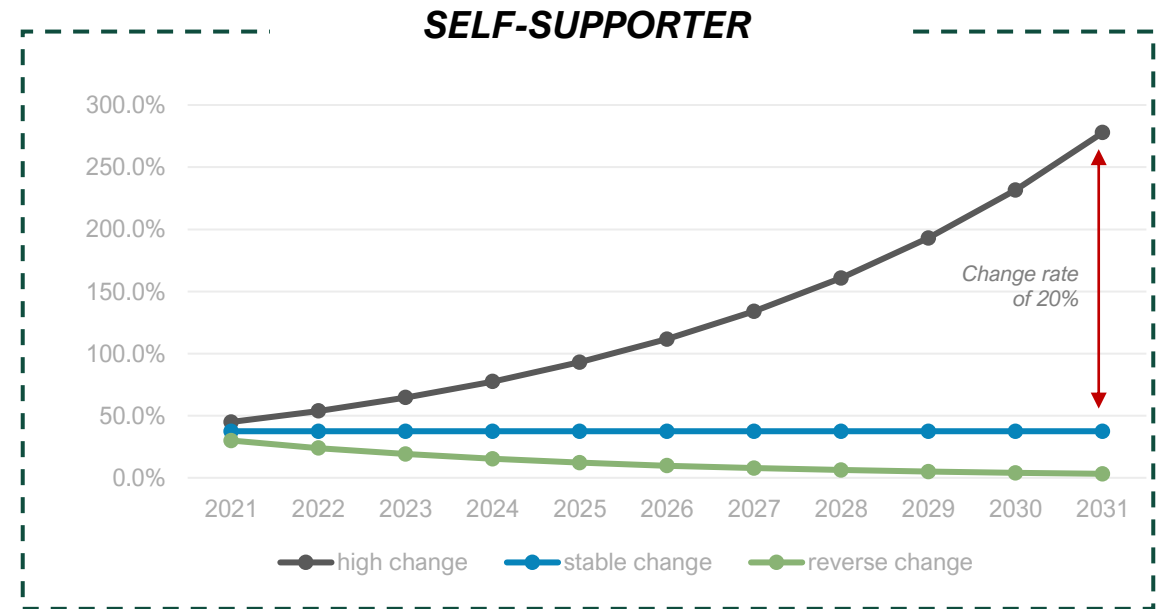
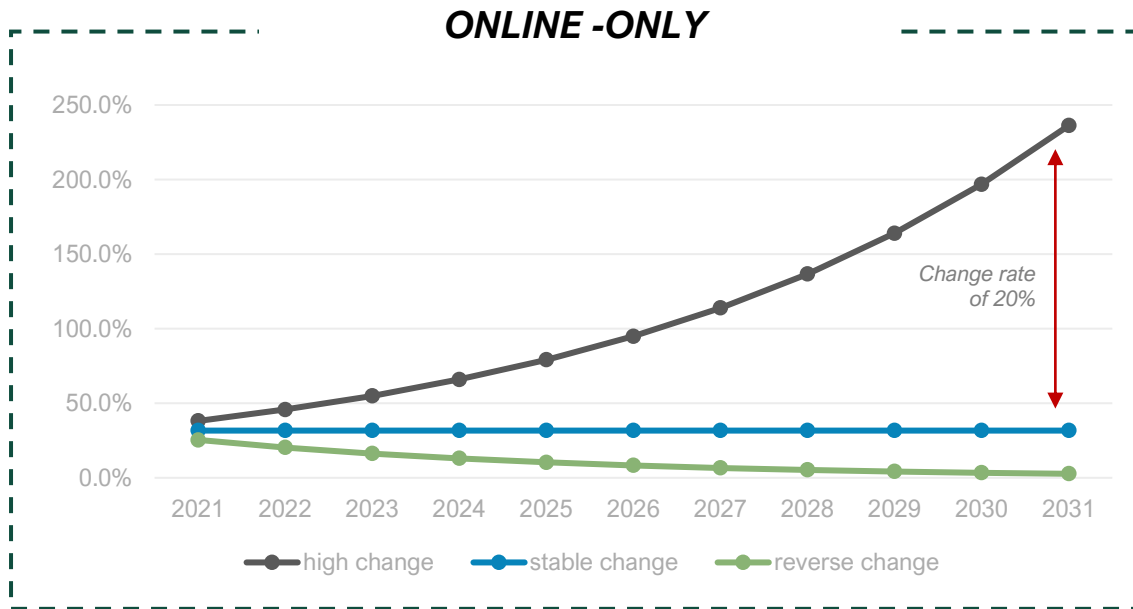
EXPECTED AVERAGE IMPORTANCE INCREASE

**245.2%**

References: (1) refers to average importance increase during past 10 years, (2) refers total change increase next 10 years – based on 20% importance increase, Excel file: Huebner, Loisel & Guddal 2021-3.

# Focus category “place” displays major importance change trends

Trends “online-only” and “self-supporter/ homemade” are expected to raise highest importance increase within next 10 years



CURRENT AVERAGE IMPORTANCE CHANGE

**50.0%**

EXPECTED AVERAGE IMPORTANCE INCREASE

**371.5%**

CURRENT AVERAGE IMPORTANCE CHANGE

**21.3%**

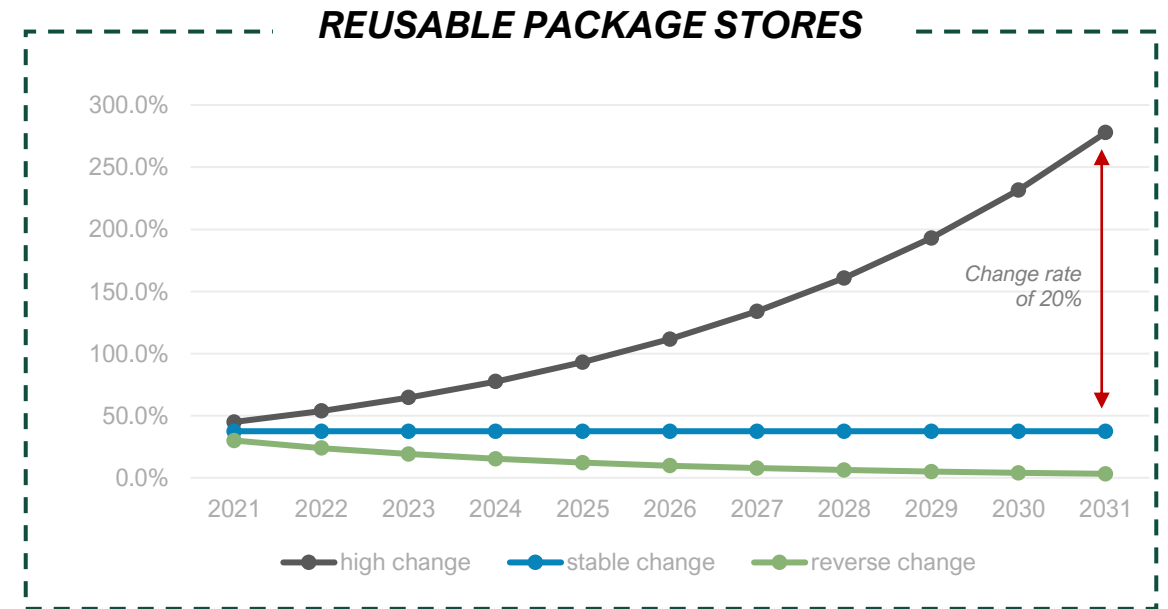
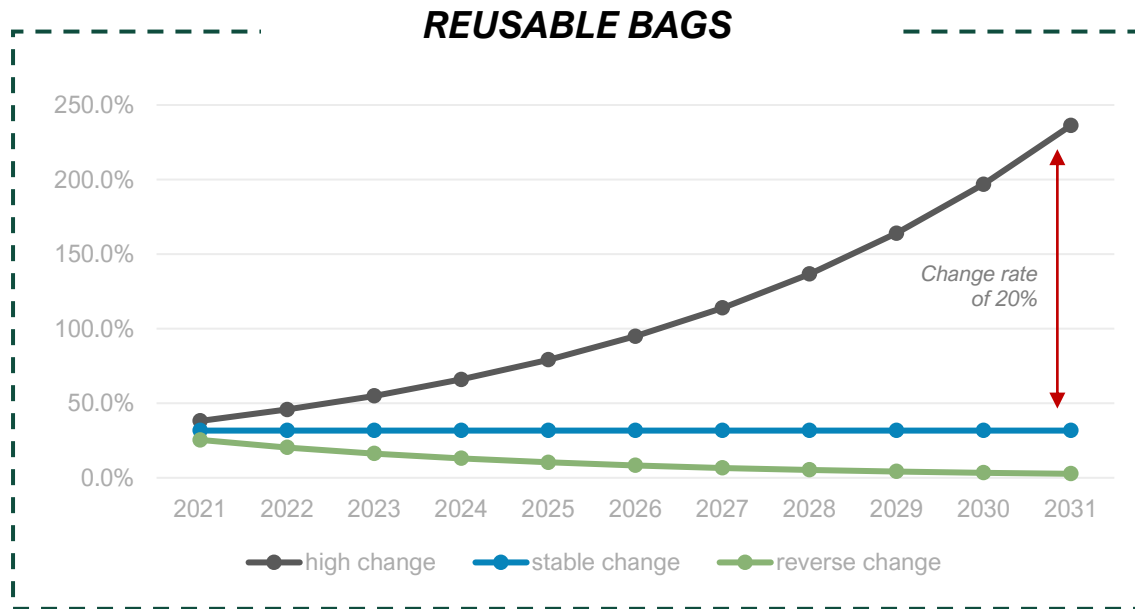
EXPECTED AVERAGE IMPORTANCE INCREASE

**158.3%**

References: (1) refers to average importance increase during past 10 years, (2) refers total change increase next 10 years – based on 20% importance increase, Excel file: Huebner, Loisel & Guddal 2021-3.

# Focus category “packaging” displays major importance change trends

Trends “reusable bags” and “reusable package stores” are expected to raise highest importance increase within next 10 years



CURRENT AVERAGE IMPORTANCE CHANGE

**77.0%**

EXPECTED AVERAGE IMPORTANCE INCREASE

**572.1%**

CURRENT AVERAGE IMPORTANCE CHANGE

**81.7%**

EXPECTED AVERAGE IMPORTANCE INCREASE

**607.0%**

References: (1) refers to average importance increase during past 10 years, (2) refers total change increase next 10 years – based on 20% importance increase, Excel file: Huebner, Loisel & Guddal 2021-3.



## Trends in product offerings are at the core of the food industry and cannot be missed out



References: <https://unsplash.com/photos/RBdE3jv5y68>



### BIO / ORGANIC PRODUCTS

- ✦ Organic food products have expanded importantly through the last 10 years to be largely adopted by consumers. They are now demanding to expand to more product categories.
- ✦ Expanding to bio / organic products goes along the demand for healthier food.
- ✦ Consumers are rising awareness on their food consumption in general. A point has been reached where they don't want OGM based food nor industrialized products.
- ✦ Power has switched from suppliers to consumers. The compliance to those new aspects is inevitable for prosperity and development within the food industry.



### ORIGIN OF PRODUCTS

- ✦ In periods of financial crisis where unemployment is striking implying a reduced buying-power of individuals, local communities recognize the need to buy and support economically the local actors.
- ✦ Consumers are seeking for more quality, a determinant factor for it on the demand side is proximity of production. There is a tendency to give more faith to products that are produced locally.
- ✦ Using local raw products, or retailing local producers is a new important arguments that need to be highlighted. It illustrates more transparency and enhances customers' attachment



## Consumers explored new ways to get food for more convenience and trust in what they eat



References: <https://unsplash.com/photos/pRJhn4MbsMM>



### ONLINE ONLY PURCHASES

- ✦ Without surprise, internet has revolutionized the way we produce and consume food. Consumers became keen on online shopping. There is a growing demand for online shopping.
- ✦ Trend that has largely expanded with the COVID crisis. Many restaurants and grocery stores opened for take-aways and deliveries. At the same time, consumers got used to these services and will sustain.
- ✦ To be resilient in the industry, the opening to online retailing is essential. It also permits to better perform in periods of lockdown where physical customers cannot be permitted.



### HOMEMADE CROPS

Going along with the trend for healthier food and knowing what we are consuming. There has been a growing trend towards growing own crops in gardens or through leasing of garden spaces in cities.

The pandemic has also added momentum to that trend. With the danger that represented supermarkets and grocery stores, individuals recognized the need for more self-sustainability.

Companies can leverage this trend by helping individuals to make this change happening and propose products/services individuals to consume their homemade crops.



## Fighting against plastic waste is crucial to respond to by food suppliers & consumers



References: <https://unsplash.com/photos/i5tesTFPBjw>



### OWN REUSABLE BAGS, CONTAINERS

- ✦ As a reaction of rising awareness on environment damages by plastics, the usage of reusable bags has been deeply integrated by an important part of the consumers.
- ✦ Although, using reusable bags is not enough, it's the global supply chain that needs to evolve and major opportunities are still possible to be implemented.
- ✦ Consumers have shown through the analysis that they are willing to adopt new measures on the short-term (5 years), to bring more own containers and packaging before going grocery shopping to buy in bulk pasta, rice but also vegetables. This action should be pushed through promotion by major food companies.



### REUSABLE PACKAGING

To respond to consumers' effort to fight against plastic waste, individuals are expecting the industrialized companies and producers to take effective actions.

One major point highlighted during the analysis is the need to market products that are packaged in reusable packaging or ecological friendly packaging.

In order to make that change efficient, the entire supply-chain needs to collaborate to find solutions. As reusable packaging are more expensive, deposit like in Germany can be implemented.



## Consumers are concerned on switching for more sustainable production



References: <https://unsplash.com/photos/cdfv65CldQQ>



### SUSTAINABLE PRODUCTION

- ✦ Sustainability focuses on meeting the needs of the present without compromising the ability of future generations to meet their needs. The concept of sustainability is composed of three pillars: economic, environmental, and social.
- ✦ With all scandals and events happening around the world during the last past years, there has been rising concerns that the current global food industry is not sustainable.
- ✦ It seems extremely important, more than ever, that all stakeholders sit together and work on collective initiatives - rather than individual actions.



### CLIMATE FRIENDLY PRODUCTION

As temperatures are rising all around the globe, climate change represents an extremely urgent problem to address.

Consumers are aware and are looking at what companies are doing to provide better solutions on the ecological issues.

The climate change hurry should not be tackle as a reaction but as an initiative that is illustrating the values, mission and vision of the company. All production processes need to be checked, controlled in order to assess the impact on environment and find ways to reduce it all along the chain.

# Company profile: Landwirtschaftlicher Betrieb Horn



*“Mission”*

## Type of business

Family business

## Aim/ purpose/ task/ core business

Deliver harvested grain to a mill from which we also get our feed chickens live exclusively on the floor and in free range

## Number of employees

4

## Country

Germany

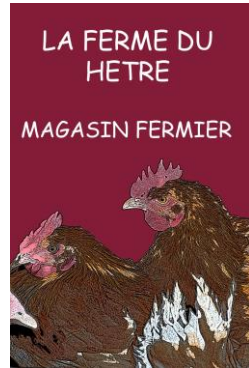
## Interviewee

Sebastian Horn

## Key insights

Farmer business from countryside in North-West of Germany  
 Growing different kinds of crops including corn and grain – 100 hector land  
 Main business is egg production  
 Immersive expansion planned due to increasingly high demand: new hen-coop is going to be constructing in 2021 to provide room for more than 9000 chicken  
 Animal food produced in-house from own crops  
 Direct sales within 2km radius of farmer cottage

# Company profile: Le Ferme du Hêtre



*“Deliver local products made in Normandy to local population cutting all intermediaries”*

## Type of business

Limited Liability Company

## Aim/ purpose/ task/ core business

Breeders of poultry, and bovines retailing directly to consumers the products of the farm to be more independent from industrial companies.

## Number of employees

3

## Country

France

## Interviewee

Sabrina

## Key insights

Opened an on-site shop in 2008 after the recognition that over-production requested by industrial companies was altering the quality of their products as well as their lives for non satisfactory benefits.

Invested in a truck to be present in 3 different local markets to propose, essentially meat, to consumers.

Expanded portfolio of products retailed by concluding partnerships with local farmers producing milk-based products.

# Company profile: Armor fruits



*“Import, and export the best fruits & vegetables to our wide range of customers”*

## Type of business

Industrial company

## Aim/ purpose/ task/ core business

Deliver harvested grain to a mill from which we also get our feed chickens live exclusively on the floor and in free range

## Number of employees

60

## Country

France

## Interviewee

Jérôme Le Gleut

## Key insights

49 years of existence  
Part of Le Saint group  
Revenues of 26,7 million € in 2018

# Company profile: Hotel Rivers Du Ter



*“Exquisitely placed on the calm and soothing shores of the “Étang du Ter” pond, the “Les Rives du Ter,” is also the perfect spot for a seminar or reception, a moment of relaxation, or some divine local cuisine.”*

## Type of business

Hospitality company

## Aim/ purpose/ task/ core business

Offers hospitality services such as accommodation, seminar, reception, relaxation and cuisine thanks to their restaurant.

## Number of employees

40

## Country

France

## Interviewee

Stéphane Jacq

## Key insights

15 years of existence

Belongs to the Emerald Hotel Network & the Best Wester Plus family of hotels

Revenues of 2 million € in 2015

# Company profile: Grand Hotell



*“To give the best food experience to our guest through quality and local food”*

## Type of business

Restaurant

## Aim/ purpose/ task/ core business

Deliver diet-friendly food for every task and demand

## Number of employees

13

## Country

Norway

## Interviewee

Jøren Askewoll

## Key insights

Introduced actions to reduce food waste by donating food initiatives and by implementing food saving app “Too good to go”

Traditional and national dishes have become more attractive by local and international guests

Growing importance of close relationships with local farmers to both, strengthen local community and producing quality, fresh and organic food

# Company profile: Orkla



*“Improving everyday life with sustainable and enjoyable local brands”*

## Type of business

Conglomerate

## Aim/ purpose/ task/ core business

Supplier of branded consumer goods

## Number of employees

518

## Country

Norway

## Interviewee

Steven Gørende

## Key insights

- Focus on organic production and products
- Reduce climate footprint in supply chain
- Perceive increasingly more consumer conscious about food decision
- Initiated sustainability department with focus on internal charts and KPI's of more sustainable production, product and supplier network
- Introduced sustainable portfolio product like the brand Klar and reusable plastic in most of the product packaging

# Company profile: Dyrk

The logo for Dyrk, featuring the word "dyrk" in a bold, lowercase, serif font.

*“Give the world more space to grown own food”*

## Type of business

Start-up Online platform

## Aim/ purpose/ task/ core business

Offer renting of garden spots for home-grown food, linking renters of gardens and individual wanting to grow crops and home-grown food

## Number of employees

4

## Country

Norway

## Interviewee

Thomas Halvorsen

## Key insights

Founded in 2018 aiming at the focus of self-sufficiency and sustainable consumption  
Growing trend of people wanting to grow own food due to its more safe, know the origin and self-sufficiency  
Not only focusing on growing plants and vegetables, but is also concerned with helping other people, and wants to help save our planet.  
Implemented 8 of 17 UN sustainability goals

# Company profile: MyProtein



*“Mission”*

## Type of business

Food & supplement Start-up

## Aim/ purpose/ task/ core business

Providing sports and fitness supplements

## Number of employees

305

## Country

Greater Manchester, England

## Interviewee

Chris Johnston, Manager MyProtein

## Key insights

Revenue: 639.7 M pounds

Part of The Hut Group

Solely e-commerce

Sports nutrition brand with wide product range including: protein powder, vitamins and minerals, high-protein foods, snack alternatives, and performance clothing. Company also offers amino acids, creatine monohydrate, weight gainers and diet shakes, fibre and plant supplements, carbohydrates, protein bars, drinks and snacks, nut butters, and more.

# Company profile: Coop

The logo for Coop, featuring the word "coop" in a bold, dark blue, lowercase sans-serif font. The letters are closely spaced, with the 'o's being particularly prominent.

*“It pays-off to choose Coop”*

## Type of business

Retailer/ supermarket

## Aim/ purpose/ task/ core business

Retail various grocery products

## Number of employees

27

## Country

Norway

## Interviewee

Marianne Njerheim

## Key insights

New development of distribution through home-delivery and click & collect  
Local food, transparency and self-sufficiency growing attribute for purchase  
One of leading retail groceries in Scandinavia in terms of sustainability products  
with certificate ethical product standard like: Änglamark, Coop Smak, Fair animal  
welfare program



*“Offer customers all over the country a well-chosen selection of good quality groceries at the lowest prices.”*

## Type of business

Retailer/grocer

## Aim/ purpose/ task/ core business

Retail various products in the supermarket segment

## Number of employees

24

## Country

Norway

## Interviewee

Eva Grunde

## Key insights

Recent years of economy changed focus towards local food, ethical production and organic, without genetic modification

Perceive consumers as being more aware of the food they buy

Initiated local initiative aiming for sustainability, donating leftover food to organizations and supporting beach- and clean-up of plastic and packaging of food

Taking responsibility and commitment towards more sustainable industry

# Company profile: Deliveroo



*Deliveroo is on a mission to transform the way customers eat.*

## Type of business

Online food delivery company

## Aim/ purpose/ task/ core business

Deliver harvested grain to a mill from which we also get our feed chickens live exclusively on the floor and in free range

## Number of employees

?

## Country

England

## Interviewee

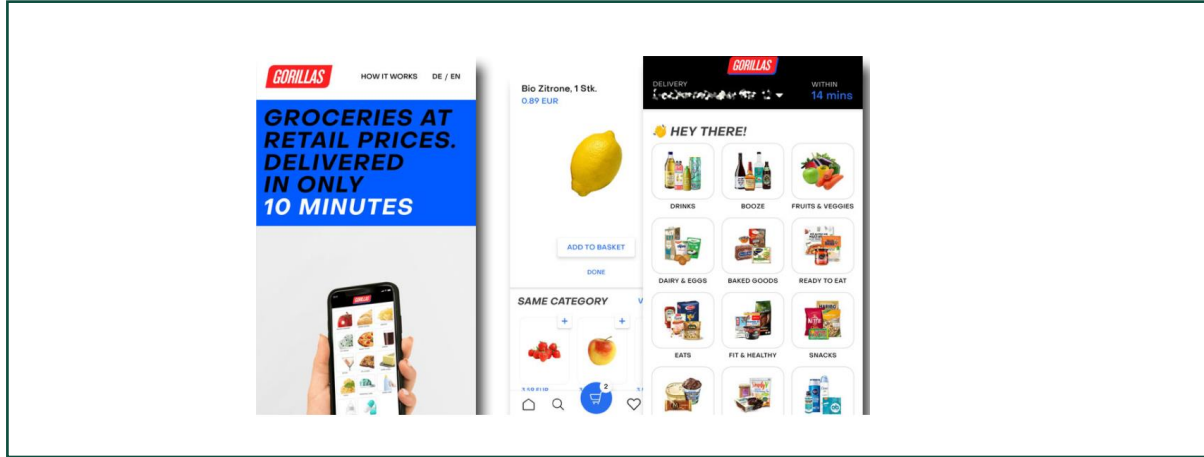
Robin Kiesler, GM Netherlands

## Key insights

Founded by William Shu in 2013 in London

Operates in over two hundred locations across the United Kingdom, the Netherlands, France, Belgium, Ireland, Spain, Italy, Australia, New Zealand, Singapore, Hong Kong, the United Arab Emirates and Kuwait

# Company profile: Gorillas



**“EINKAUFEN ZU SUPERMARKT-  
PREISEN IN 10 MINUTEN BEI DIR”**

SHOP AT SUPERMARKET PRICES FROM YOU IN  
10 MINUTES

## Type of business

Start-up delivery

## Aim/ purpose/ task/ core business

On-demand grocery delivery

## Number of employees

>15

## Country

Germany

O'Hear, S. 2020.

## Interviewee

Kagan Sümer, Founder & CEO

## Key insights

- 🌿 Founded by Kağan Sümer and Jörg Kattner in May 2020
- 🌿 Operates in Berlin and Cologne
- 🌿 Gorillas delivers groceries within an average of ten minutes
- 🌿 Idea is to address a large part of the groceries market that falls outside of a weekly bulk shop