

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.

From global efficiency to local self-sufficiency

What is the impact of Deglobalization on consumer trends?

How can businesses in the food industry adopt to these
consumer trends?

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Work project carried out under the supervision of:

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Lisbon, 4th of January 2021

Abstract

Initiated by the Industrial revolution of the 19th century, Globalization has always fascinated. Financial crisis of 2008 marked a turning point in Globalization's history. Since then, and all-around EU, more and more voices are rising to denounce its limitations on societies, culture, and environment, changing the course of this globalized momentum. Accelerated by COVID-19, the reversal of Globalization or Deglobalization is generating more awareness, provoking social events and therefore, influencing new consuming habits. This first section aims to present the evolution of Globalization through the different world economic development phases and the impact of those changes on consumers trends.

Keywords

Globalization, History, Economic development, Events, Limitations, Deglobalization, Reverse Globalization, Social Influence, Impact, Consumer trends

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Our personal motivation...



...our passion
for **food**



...our excitement for
sport and health



...our engagement in
sustainability



From global efficiency to local self-sufficiency

What is the impact of Deglobalization on consumer trends?

How can businesses in the food industry adopt to these consumer trends?

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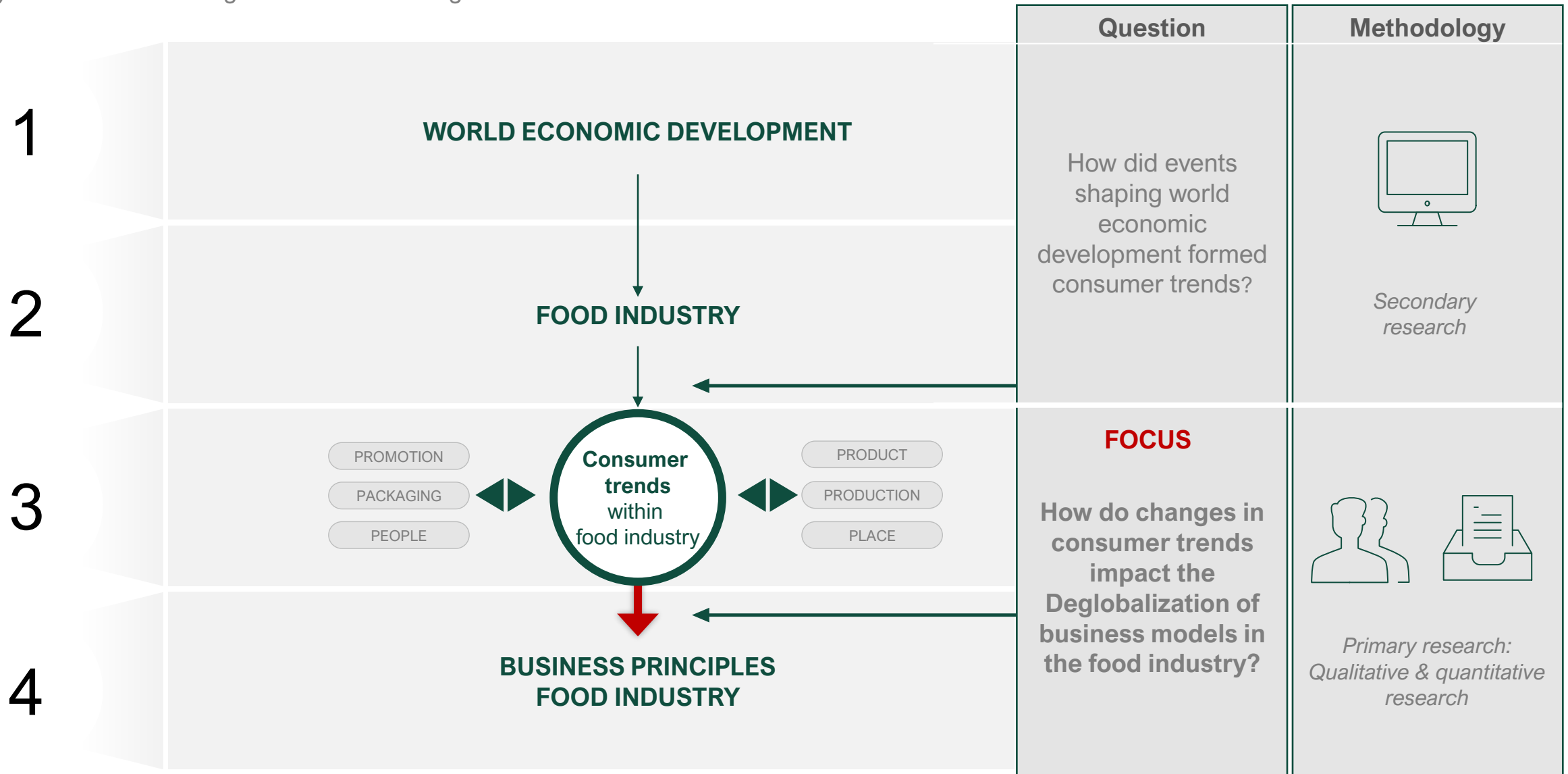


(Markham 2020)

- 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

Schematic of our investigation consists of four main chapters

Study follows the following structure of investigation



Outline of study

Four main chapters contain different subchapters to answer central research question



World economic development & its impact on consumer trends

1 Which events shaped the world economic development influencing consumer trends?

- 1.1 Events & influencers of economic development during Globalization phase
- 1.2 Events & influencers of economic development during Deglobalization/ reverse Globalization phase
- 1.3 Global consumer trends as reaction of events

Secondary research



Desk research

Literature review

*Articles
Books
Reports*

How do changes in consumer trends based on Deglobalization impact business models in the food industry?



Current food industry dynamics

2 What is the current situation of the food industry?

- 2.1 Food industry overview
- 2.2 Two-sided market perspective
- 2.3 Food industry development



Impact of changing consumer trends on the food industry

3 Which changing consumer trends shape the food industry?

- 3.1 Research methodology
- 3.2 **Qualitative prospection** on participants view on trends within food industry – *producer and consumer*
- 3.3 **Quantitative verification** of consumer trends within food industry – *consumer*

Primary research



Qualitative - Interviews



Quantitative - Survey



Recommendations for business strategy to respond to consumer trends

4 How can businesses in food industry respond to consumer trends in order to become resilient?

- 4.1 Development of **trends within categories**
- 4.2 Most **important consumer trends** to respond to
- 4.3 **Recommendations** for businesses to prioritize and adopt to trends

Our team presents main chapters individually

First three main topics are presented by one team expert – recommendations are proposed by whole team

1

WORLD ECONOMIC DEVELOPMENT



Benjamin Loisel

2

FOOD INDUSTRY



Torstein Nilsen Guddal

3

CONSUMER TRENDS



Carolin Hübner

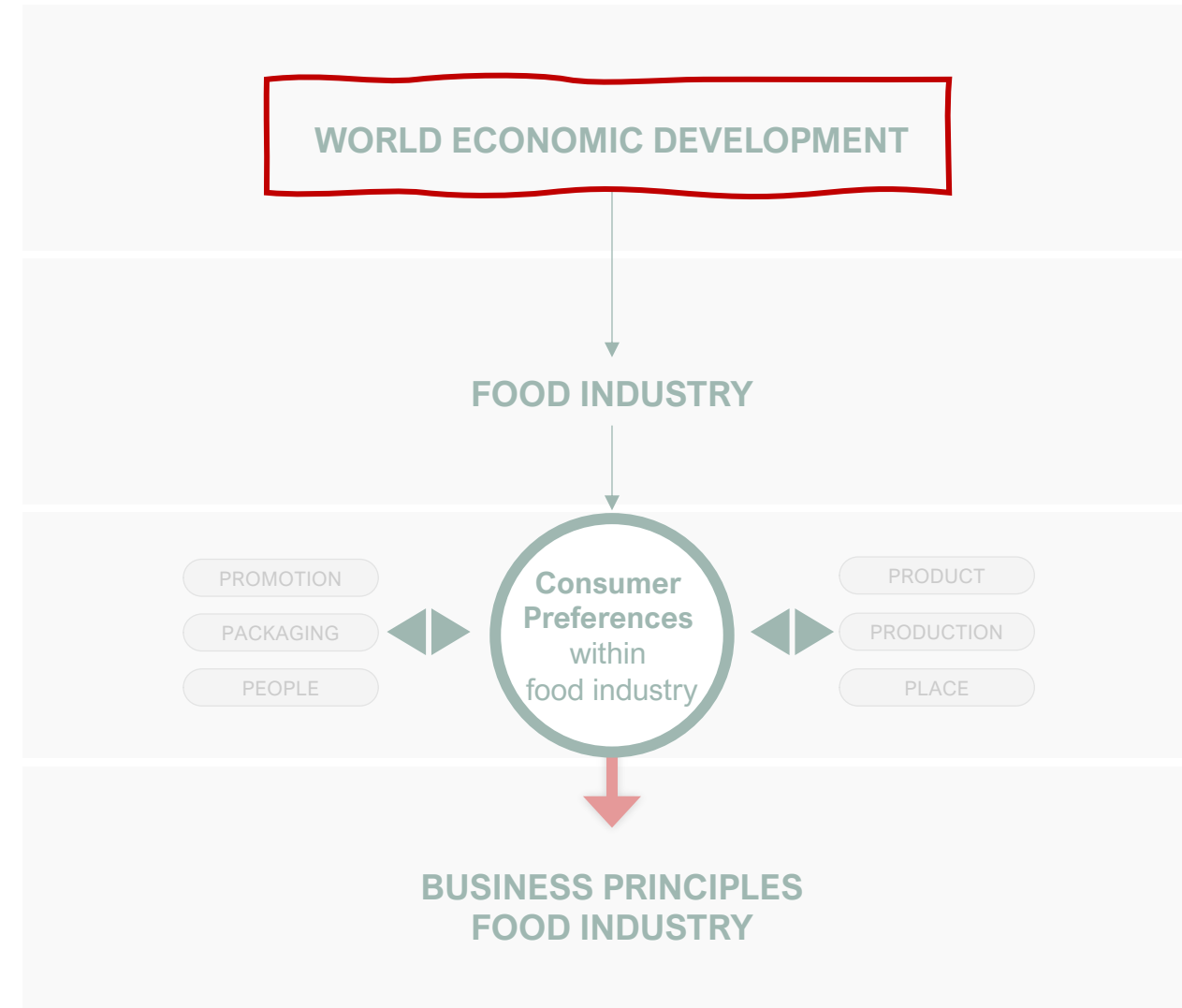
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BUSINESS IMPLICATIONS



World economic development and its impact on consumer preferences

Events that shaped world economic development





World economic development



Food Industry dynamics



Analysis of consumer trends



Recommendations on trend adaption



World economic development & its impact on consumer preferences

1. Which events shaped the world economic development influencing consumer preferences?

1.1 Globalization

- 1.1.1 How is Globalization defined and how did it evolve?
- 1.1.2 Events & influencers of economic development during Globalization phase
- 1.1.3 What are implications and limitations of Globalization?

1.2 Deglobalization

- 1.2.1 How is Deglobalization defined?
- 1.2.2 Events & influencers of economic development during Deglobalization/ reverse Globalization phase
- 1.2.3 COVID-19 as an accelerator of Deglobalization

1.3 Global consumer trends as reaction of events

- 1.3.1 How do social events influence consumers' behaviour?
- 1.3.2 What are global consumers trends?

1.1 GLOBALIZATION

Events shaping the world economic development during Globalization phase

Reference: (La Vitorie 2020)

Globalization

Deglobalization

Global consumer trends as reaction of events

Globalization has become driver of our world economy since 19th century

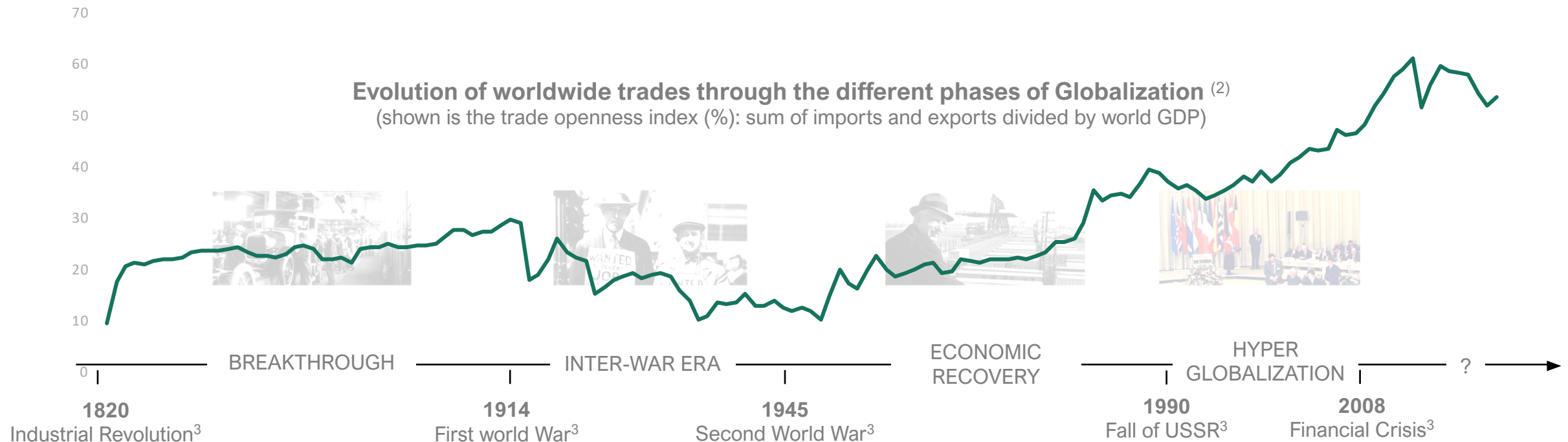
Events worldwide have shaped everyone's daily-life during different phases of Globalization

Globalization, or **increased interconnectedness and interdependence** of people and countries, is generally understood to include two inter-related elements:

1 Opening of international borders to increasingly fast flows of goods, services, finance, people and ideas.

2 Changes in institutions and policies at national and international levels that facilitate or promote such flows.¹

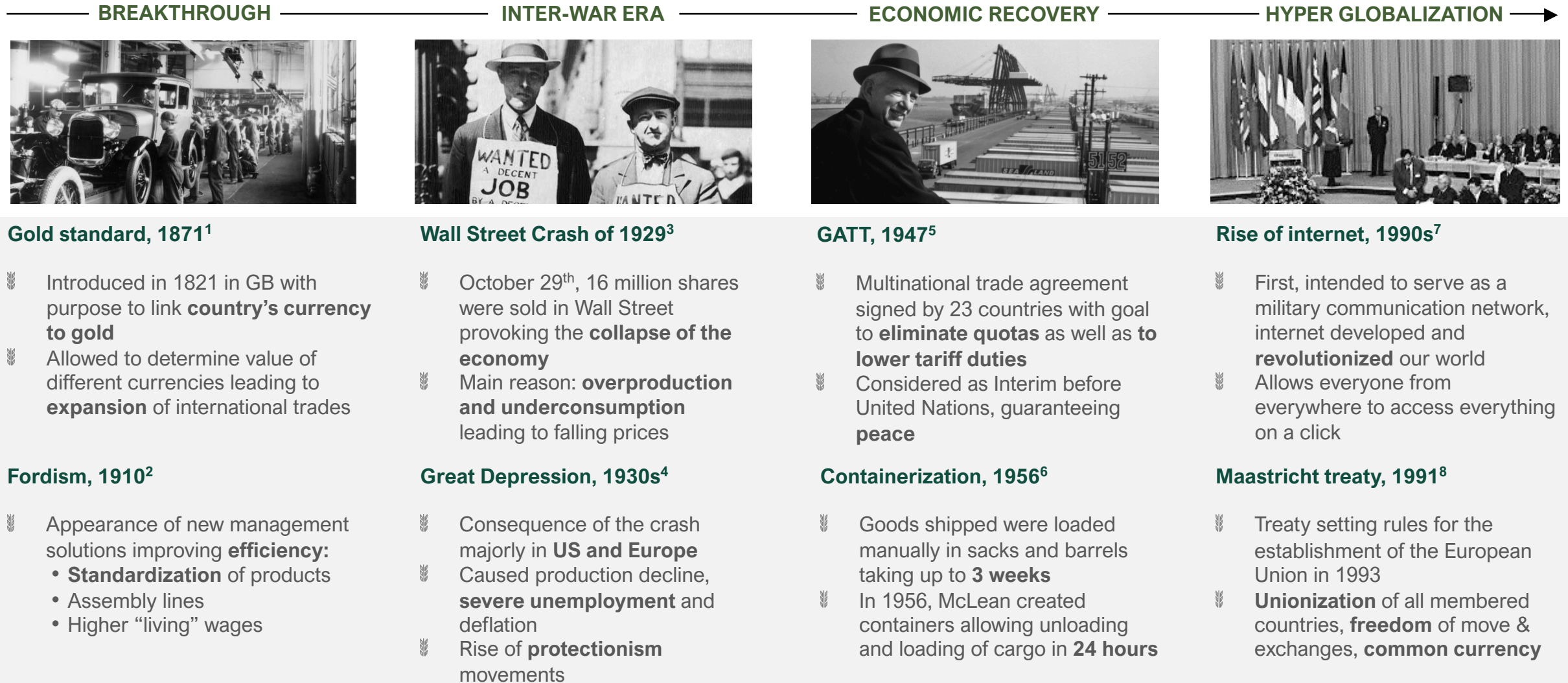
Evolution of worldwide trades through the different phases of Globalization ⁽²⁾
(shown is the trade openness index (%): sum of imports and exports divided by world GDP)



References: (1) (WHO. n.d.), (2) (Our World in Data. n.d.), (3) (Kolb 2019)

Globalization's phases are direct consequences of worldwide events

As result of consecutive events shaping the rules of the world, Globalization illustrates dynamics of that time



References: (1) (Lioudis 2020), (2) (Jessop n.d.), (3) (BBC Bitesize n.d.), (4) Romer, C. n.d.), (5) (Encyclopedia Britannica n.d.), (6) (Thompson 2018.), (7) (Tarnoff 2016), (8) (Kenton 2020)

Globalization reviled to have both; positive and negative implications

Six implications present an extract of consequences which are selected accordingly to this study

1

ENVIRONMENTAL DAMAGES¹

Due to extreme exploitation of natural resources, gas emissions caused by massive transportation/production and waste



2

ACCESS TO NEW PRODUCTS & SERVICES¹

As result of shifts for cheaper labor in emerging countries, products & services get cheaper



3

RISING INEQUALITIES²

Factories' delocalization in emerging countries increases gap in income, safety and social inequalities



4

LOSS OF IDENTITY/ STANDARDIZATION³

Multinational companies offer standardized products leading to equalization of consumption habits



5

SHARE OF KNOWLEDGE³

Developing countries benefit from implementation of international companies to acquire knowledge



6

HEALTH RISKS¹

Due to intensive traveling, incursion of communicable and international transport diseases are able to spread easily



*“Globalization had succeeded in **unifying people** from around the world—**against Globalization**. Factory workers in the United States saw their jobs being threatened by **competition** from China. Farmers in developing countries saw their jobs being threatened by the **highly subsidized** corn and other crops from the United States. Workers in Europe saw hard-fought-for job protections being assailed in the name of Globalization.”*

Joseph Stiglitz, 2006.



1.2 DEGLOBALIZATION

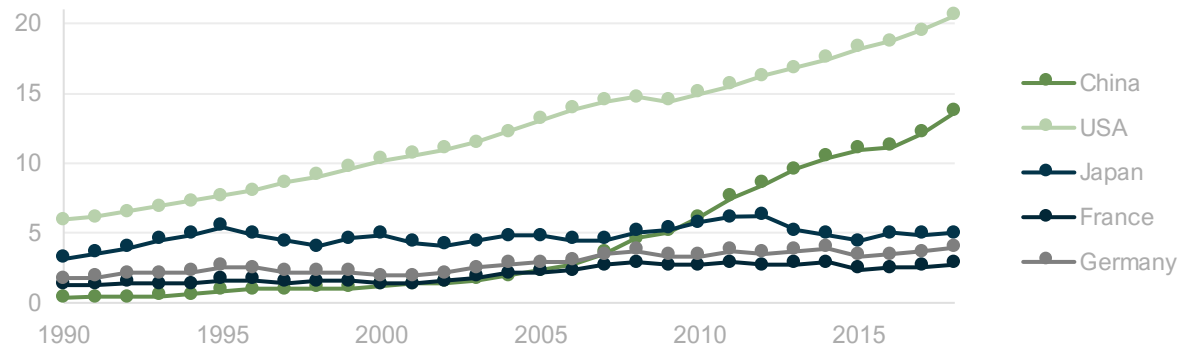
Events shaping the world economic development during Deglobalization phase

During past years, Globalization reversed changing world economy dynamics

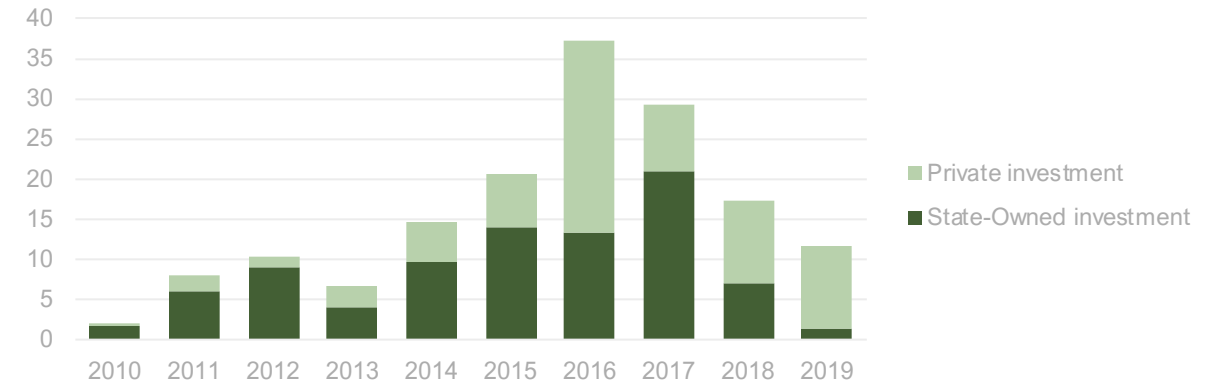
Hyper Globalization phase resulted in financial crisis provoking reversal of Globalization

Reverse Globalization is the trend of emerging markets investing in the developed world reversing the course of Globalization¹

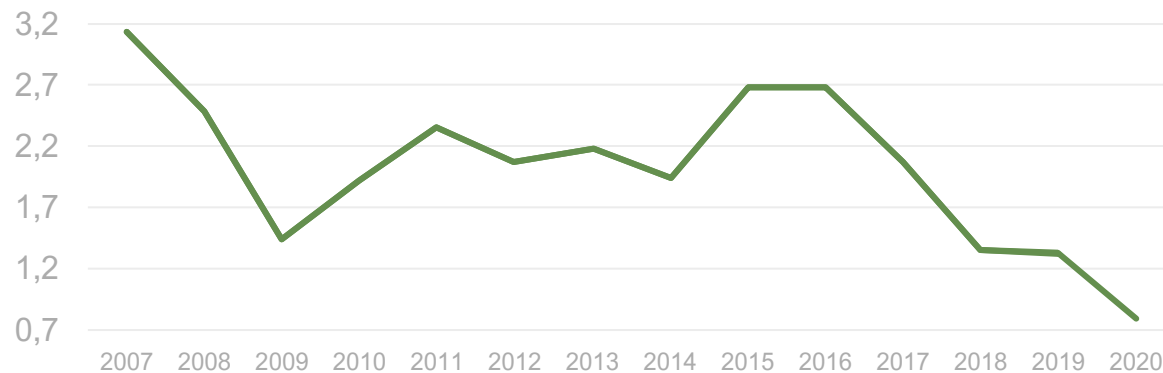
Chinese GDP growth compared to occidental countries from 1990 to 2018²



Chinese FDIs in Europe (in billion Euros)³



Evolution of worldwide total FDIs in Trillion USD from 2007 to 2019⁴



🌾 Momentum of reverse Globalization is **part of Deglobalization** phase that can be observed since financial crisis⁵

🌾 Deglobalization is commonly used to describe a period of time when **international trades and foreign investments decline**¹

🌾 Deglobalization results in **lower interconnectedness and interdependence** between people and countries

🌾 Deglobalization does not refer to the end of Globalization as it is perceived as **irreversible** but rather as a **change** of direction of Globalization

References: (1) (Groom 2018), (2) (Data.worldbank.org. n.d.), (3) (Statista n.d.), (4) (Data.worldbank.org. n.d.), (5) (Oxford Reference n.d.)

This change in direction has been driven by economical, cultural and social events

Deglobalization is not only result of a financial crash, it is also consequence of evolutionary events and revolutionary events

EVOLUTIONARY EVENTS

INDUSTRY SCANDALS



Horse meat scandal¹



Volkswagen fake gas emissions report scandal²

H&M, Zara, and other fashion brands are tricking shoppers with vague sustainability claims
A new report on H&M underscores how companies misled the public by failing to provide adequate detail on their environmental initiatives.

Impactions of fast-fashion brands on sustainability³

POLITICAL EVENTS



Brexit⁴

Trump makes it official: U.S. will withdraw from the Paris climate accord

United States' withdrawal from Paris Agreement⁵

Economy | Coronavirus pandemic
US-China trade war: Trump admin takes aim at supply chains

US-China trade war⁶

REVOLUTIONARY EVENTS

CLIMATE CHANGE PROTEST

Protesting Climate Change, Young People Take to Streets in a Global Strike



FridaysForFuture⁷

Climate protests: Marches worldwide against global warming

Climate Changed
Teen Activist Greta Thunberg to World Leaders: 'How Dare You!'



Leonardo DiCaprio's speech in United Nations to alert on the climate emergency⁸

AGAINST CAPITALISM



Occupy Wall-Street Movement⁹



G20 Hamburg protestations¹⁰



Yellow Vests movement in France¹¹

COVID-19 outbreak marks breaking point in our world's structure

Global pandemic that appeared in Wuhan in late 2019, is an unprecedented event accelerating reversal of Globalization¹

Mr. Macron says: "the crisis as an existential event for humanity that will **change the nature of Globalization** and the structure of international capitalism." (Financial Times 2020)²

Implications of COVID-19 on Economy³



References: (1) (Irwin 2020), (2) (Mallet and Khalaf 2020), (3) (Jones, Polumbo and Brown 2020), (4) (The Guardian 2020)



1.3 IMPACT OF DEVELOPMENT ON CONSUMER TRENDS

Number of social influences have exponentially increased with internet

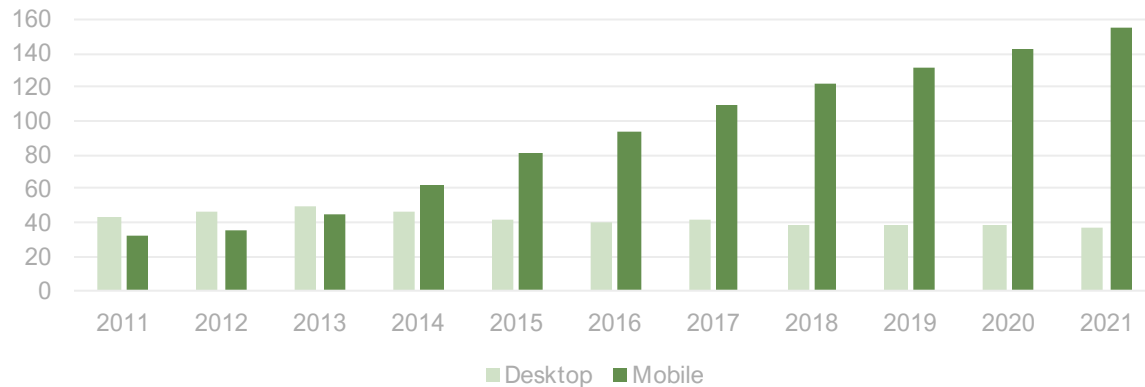
Consumers' buying decisions – trends are based on information collected through social influences: family, reference groups and leaders

Social influence is defined by John C. Turner (1991) “as the processes whereby people directly or indirectly influence the thoughts, feelings and actions of others”¹. The Rider University, specialized in human services, categorizes social influences in two ways:

1 Informational Social Influence: situations where individuals base their decisions on information and data another person provided

2 Normative Social Influence: tendency of individuals to change their thoughts or behaviours to be either liked, accepted or fit in³

Daily time spent with internet per capita worldwide from 2011 to 2021, per device (in minutes)⁴



With increasing time spent on internet consumers become **exposed** to various:⁵

Opinions Beliefs Thoughts Information

USERS CAN INTERACT WITH OTHER ANONYMOUSLY⁶

Lack of repercussion implies a bigger freedom of speech online

PHYSICAL DISTANCE IS NOT IMPORTANT⁶

Do not need to meet people to be influenced

PHYSICAL APPEARANCE IS NOT IMPORTANT⁶

Cannot base judgements of the information on anything else than what the profile says

INTERACTION DOES NOT NEED TO BE SIMULTANEOUS⁶

Access to all types of information at any time

Social events, scandals, protests are now **important drivers** of consumers' behaviour with the usage of internet.

Rising trends towards more conscious consumption in a digital age

Global consumer trends of 2019 are represented by Euromonitor¹

①

AGE AGNOSTIC¹

« Older people want to feel, behave and be treated as younger »

- Concerns seniors benefiting from high spending power in the most developed countries
- They want to enjoy life without thinking about the future

②

BACK TO BASICS¹

« Less is more »

- Trend illustrating the consumers that are rejecting mass-produced and generic products
- Focus on hyperlocal food, eco-luxe glamping holiday experiences, authentic as well as differentiated products

③

CONSCIOUS CONSUMER¹

« Being mindful in your buying »

- Mindful consumers in developed economies
- Buying and looking for solutions to the impact of mass-consumerism
- Specifically concerned about treatment of other human beings, animals and environment

④

DIGITALLY TOGETHER¹

« Proximity is no longer a boundary »

- Online users share on social platforms to be involved in activities together
- Virtual platforms are used as social hubs on the same level as in-person meet-ups

⑤

EVERYONE'S AN EXPERT¹

« Knowledge is power »

- Consumers see hyper-availability as normality for researching and shopping
- Change in power between shoppers and suppliers. Previously consumers relied on retailer's info while now they made their researches in advance

Consumers show specific dedications on self-awareness and healthiness

Global consumer trends of 2019 are represented by Euromonitor¹

⑥

FINDING MY JOMO

« The joy of missing out »

- Due to hyper-connectedness, the boundaries between professional and private life are blurred
- This trend focuses on the importance to let it go and accept to miss news or interactions
- Being back to real life

⑦

I CAN LOOK AFTER MYSELF¹

« Consumers turn to alternative self-care methods »

- Cutting out the middle-person
- Trend illustrating the focus on preventative measures against sickness, unsatisfaction or discomfort
- Reduce the stress generated by the multiple modes of consumerism

⑧

PLASTIC-FREE WORLD¹

« Consumers taking action to eliminate plastic waste »

- Global rising desire for a zero-plastic world
- Single-use packaging for fast moving consumer goods, microplastics in beauty are specifically targeted

⑨

I WANT IT NOW¹

« Efficiency-drive lifestyles & frictionless experiences »

- Consumers have never been as busy as they are nowadays: they are now seeking for time optimization
- High expectations for products and services to be delivered as quick and as simple as possible

⑩

LONER LIVING¹

« Living the single life »

- Younger generations are more reluctant to take engagements
- Many single later lifers (+50) are experiencing it as less family engagements

References: (1) (Angus and Westbrook 2019)

Overview: Chapter 1

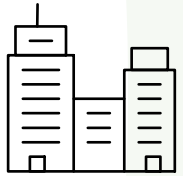
Which events shaped the world economic development influencing consumer trends?



To illustrate changes in consumer trends and determine how businesses respond to them, study of one specific industry should be conducted. As food is something **everyone is involved in**, with an industry **entirely globalized, influencing and contributing** to pollution, **food industry was selected**. Therefore, this study investigates how food industry is articulated as well as how did the consumers' trends influence supply-side strategies

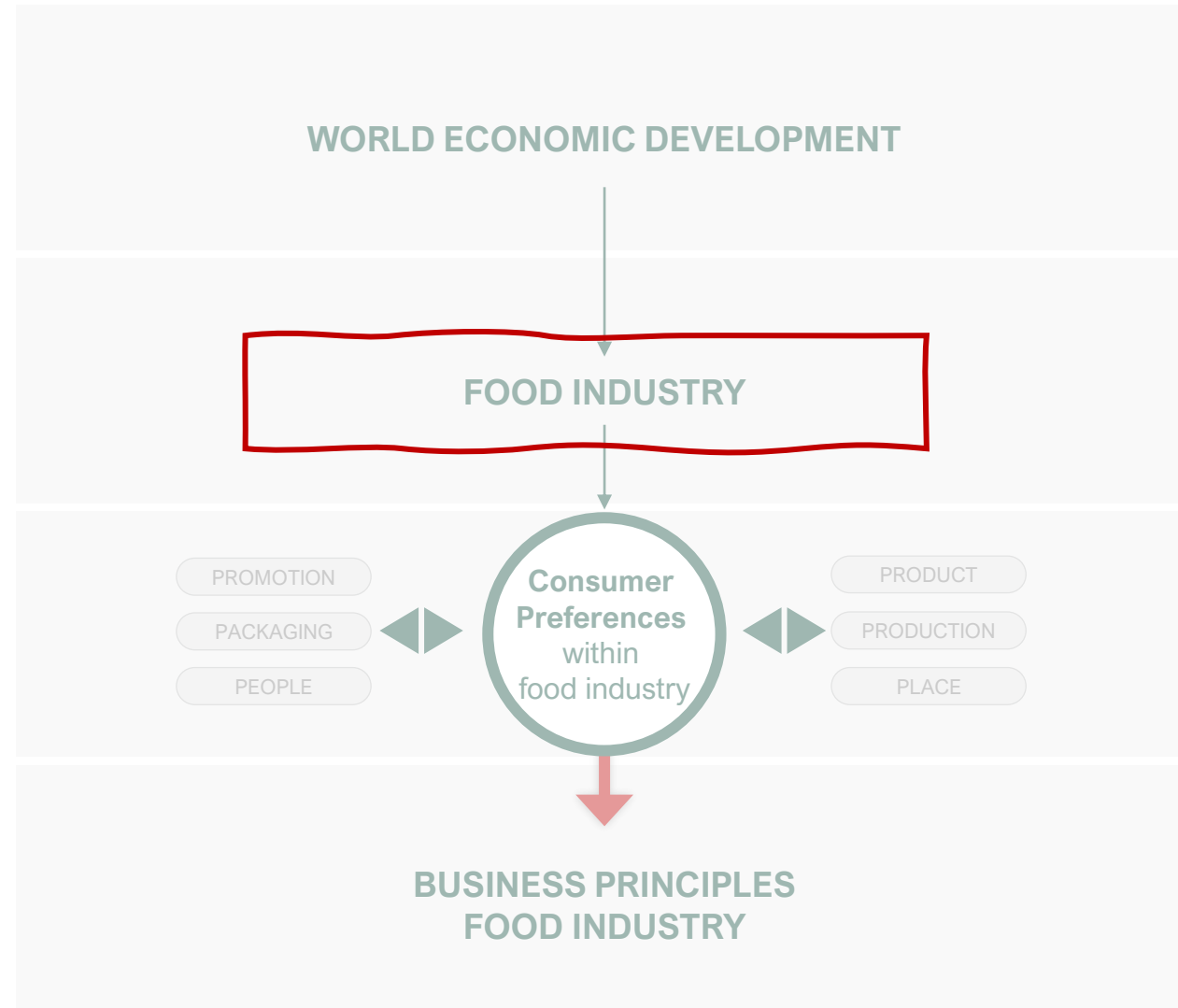


How do changes in consumer trends based on Deglobalization impact business models in the food industry?



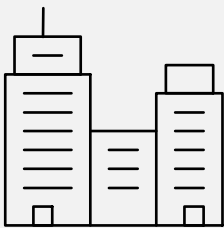
Current food industry dynamics

Two-sided market perspective – supply and demand side





2. What is the current situation of the food industry



Current food industry dynamics

2.1 Food industry overview	2.1.1 How is the food industry defined? 2.1.2 What do key performance indicators show?
2.2 Two-sided market perspective	2.2.1 Who is part of the supply side in the food market and what does the supply side offer? 2.2.2 Who is part of the demand side and what is demanded?
2.3 Food industry development	2.3.1 What are the industry's developments and limitations? 2.3.2 How is the industry reaction? (first sense that things are evolving) 2.3.3 What are the emerging future trends and requirements in the food industry?

2.1 FOOD INDUSTRY

Overview

References: (Food Service 2020)

Food industry overview

Two-sided market perspective

Food industry development



Food industry presents to be a growing market shaping new normal

Food industry is largely globalized and is defined by certain key figures

“Food industry includes all aspects of food production and sale, including raising of crops and livestock, manufacture, food processing, packaging and labelling, storage and distribution”¹

\$10 tn

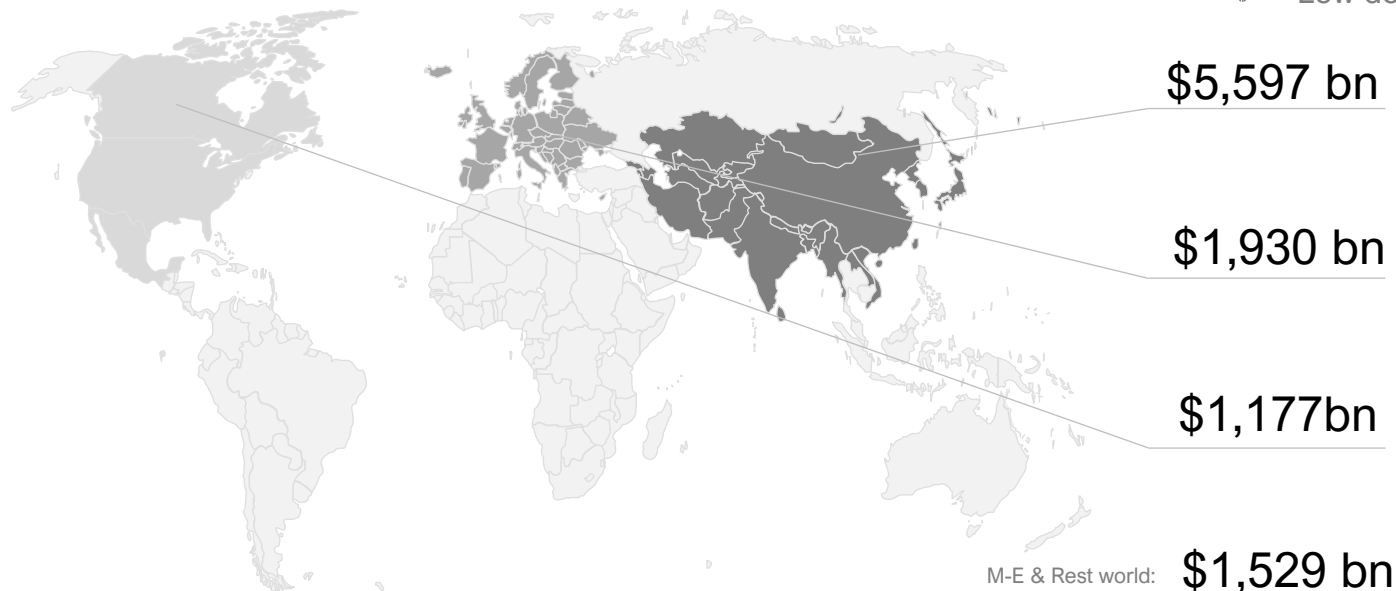
REVENUE

0,3%

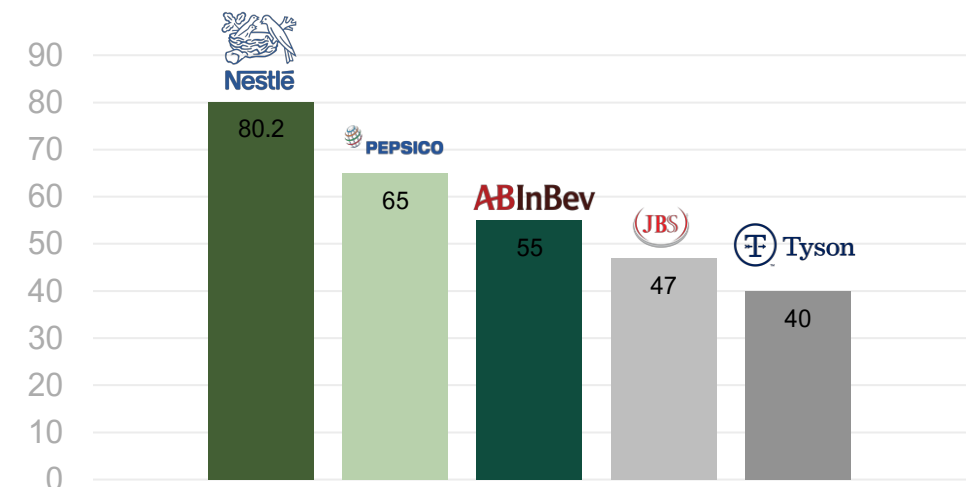
MARKET GROWTH

Characteristics of the industry

- Is highly sensitive to consumer shifts, trends and demand²
- Major player's global market share ranging from 0,5% - 0,8%¹
- Low degree of differentiation¹
- Competing on small margins & adopting to changing environment¹
- Market forecast to decelerate to 0,5% from 0,8% CAGR¹
- Asiapacific is biggest market (54,8%)¹



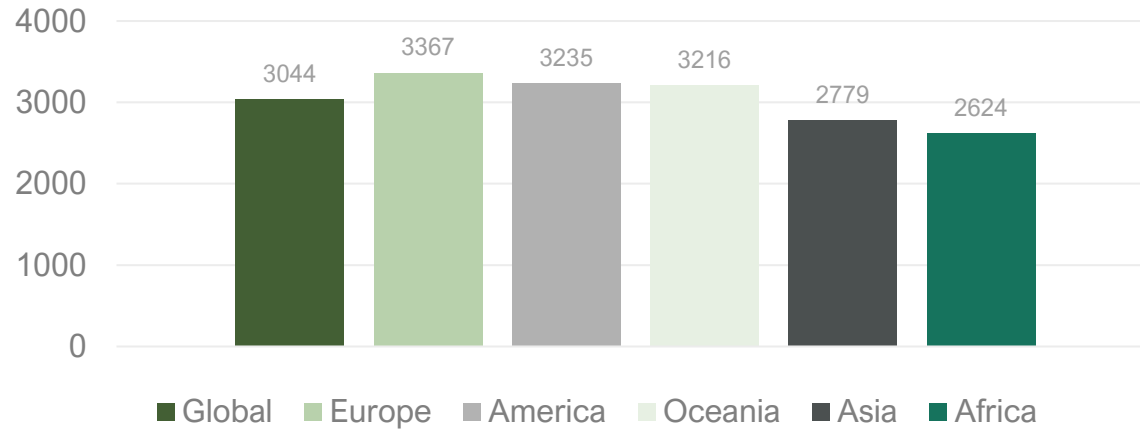
Key players & Food sales (in bn USD, 2019)



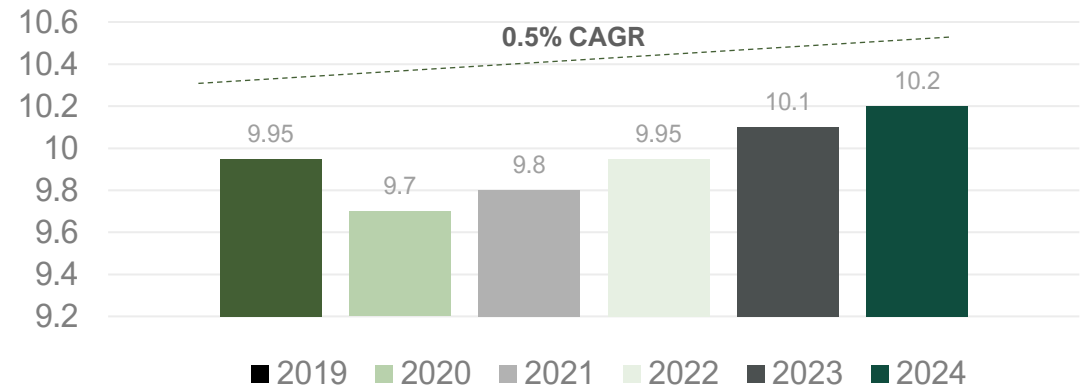
Food industry experiencing forces driving performance, regional shift & preferences

Key performance indicators of the industry

Geographical average kcal/capita/day (food balance)



Market value forecast 2019-2024 (in bn USD)



Food consumption reveals two major tendencies:



Increasing consumption from emerging countries due to income growth (high value products e.g., meat and dairy products)¹



Rising awareness and concerns in developed world led to **lower consumption**¹

Food industry is forecasting to increase over next four years



Due to the global pandemic happening in 2020, the food industry has been **minorly** impacted with a **decrease of 0,25%**²



The level of market value will reach **10,2 by 2024** proving a **0,5% CAGR** since 2019²

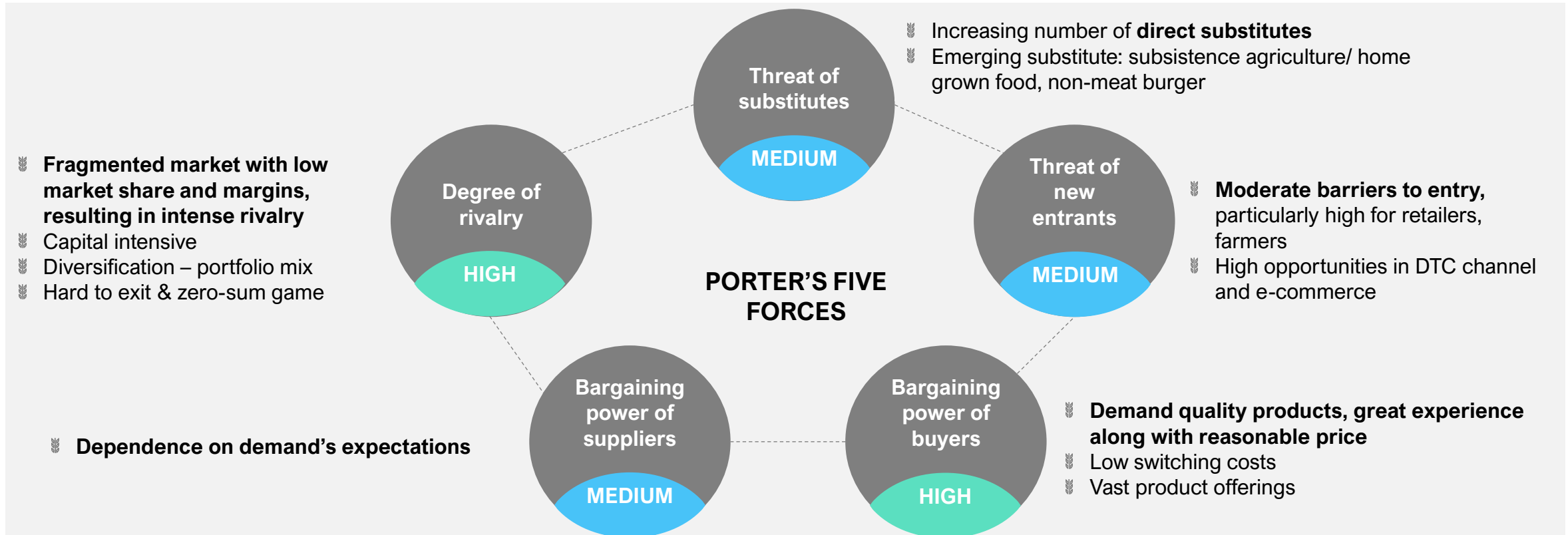
CONCLUSION

Biggest regional market, Asia-Pacific, accounted for 54,8% of the global market and predicted to increase²

Predicted shift towards developing markets – mostly due to demographic, rising disposable income and preferences³

Food industry dynamics demonstrate market attractiveness

Porter's five forces represent in-depth view in supply as well as consumer amenity

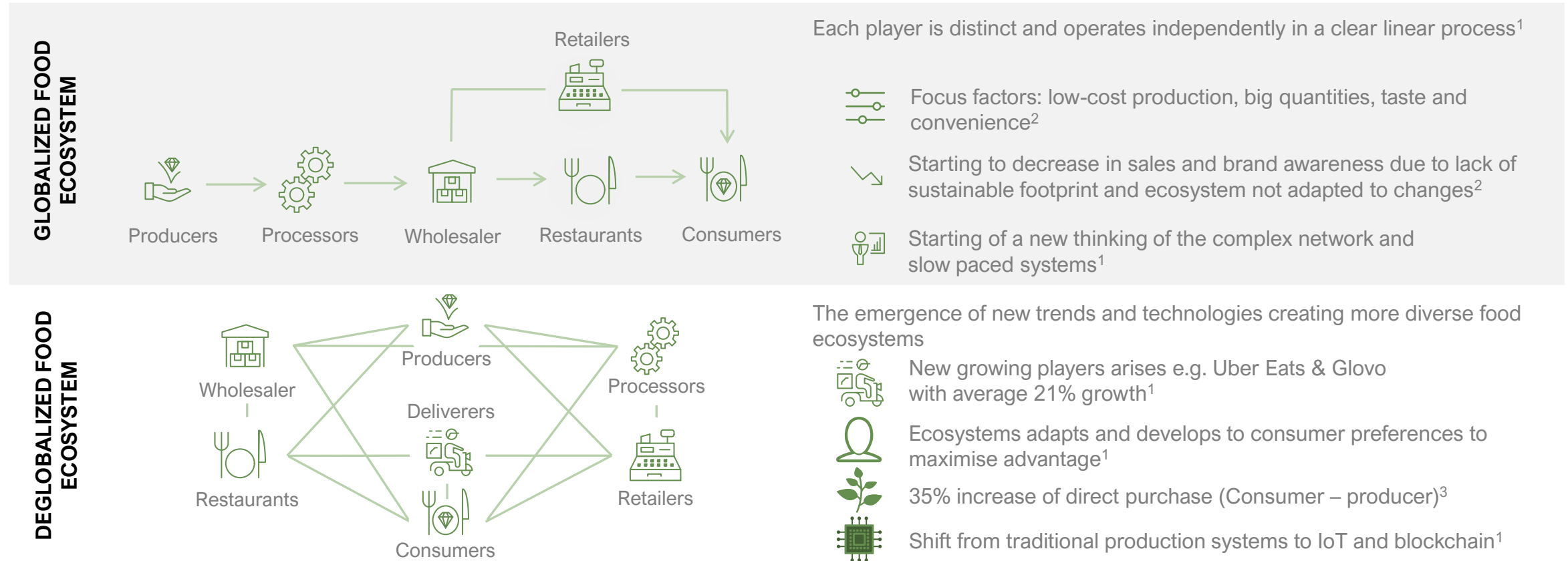


CONCLUSION

Analysis shows moderate barriers to entry, hard to exit the market, capital intensive and generally low differentiation. Therefore, food market provide opportunities and potential emerging advantages through diversification, innovation and trends e.g. D-T-C, home-grown food and local production

Food industry created new opportunities in supply chain towards consumer trends

Trends and shifts seen as enabler to creating new potentials



CONCLUSION

Increasing interconnectedness and interdependence food ecosystem is creating more value and choices¹

Growing importance to become agile: monitor and adapt to changes to remain resilient, sustainable and relevant⁴

2.2 FOOD INDUSTRY

Two-sided market perspective

References: (Food Safety 2019)

Food industry overview

Two-sided market perspective

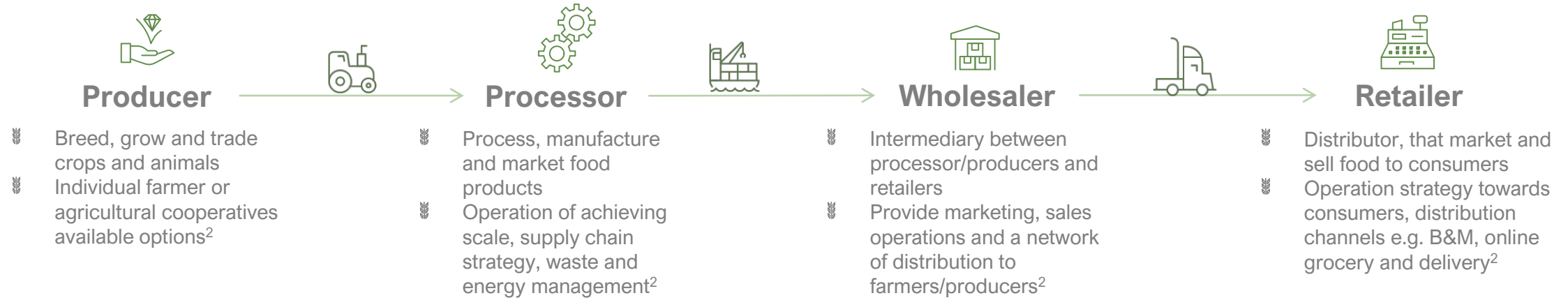
Food industry development

Food industry development



Food supply chain has undergone significant changes due to industry drivers

Four main actors build food supply-chain



MOST USED STRATEGIES

Strategic portfolio diversification

- Diversify portfolio offering
- Creating a fundament of growth offering and experimentation to enter new market and gain market share¹

Example: Nestle - Blue Bottle Coffee



Backward integration

- Acquires a key supplier of materials, products and manufacturer
- Build competitive advantage e.g. economies of scale & capabilities¹

Example: Tyson - Raised & Rooted



Direct-to-consumer & e-commerce

- Sell products directly to the end-consumer, retailers & Wholesaler
- Provides a simple and cost-effective way to create business and scale up¹

Example: Heinz - Heinz to Home



Demand side possesses driving power shifts, that needs to be adapted by suppliers

Every individual is part of demand side

Consumer



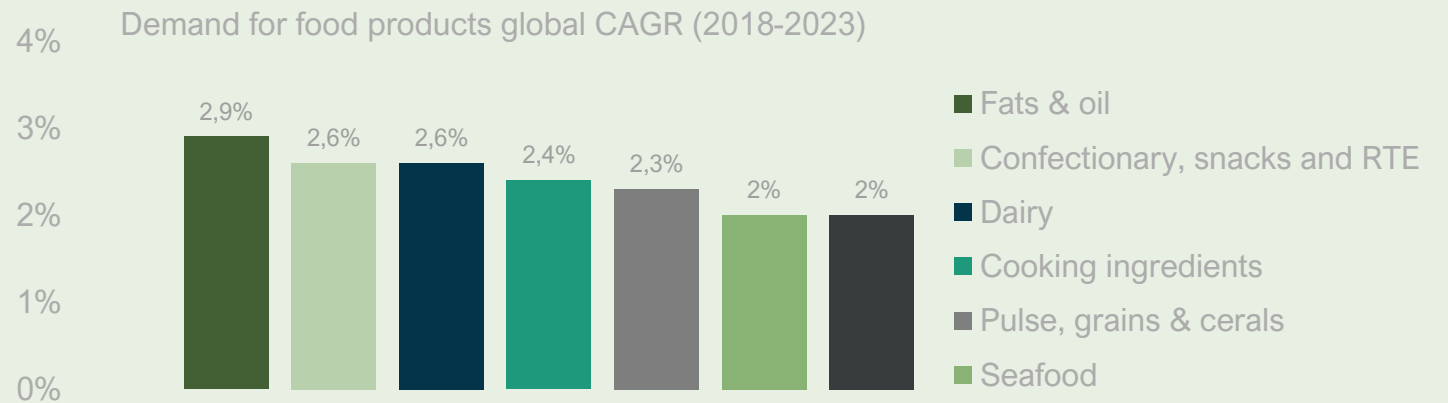
- Consume, shop and purchase various types of products, food & snacks from the supply side¹
- Possess the power to change** that needs to be adapted by offering players²
- Example: Covid-19, transparency, safety and digital offering⁵



As a consequence of Covid-19 consumer habits changed – Amazon Fresh introduced online grocery, home-delivery, digital click & collect to adapt to the new changes³

What is demanded?

- Driven by **rise in population** food is set to see further growth and demand⁴
- A CAGR of 1.7% in urbanised population between 2018-2023 and 1% in total population growth increasing global demand for food⁴



2.3 FOOD INDUSTRY

Development

References: (Henry 2013)

Food industry overview

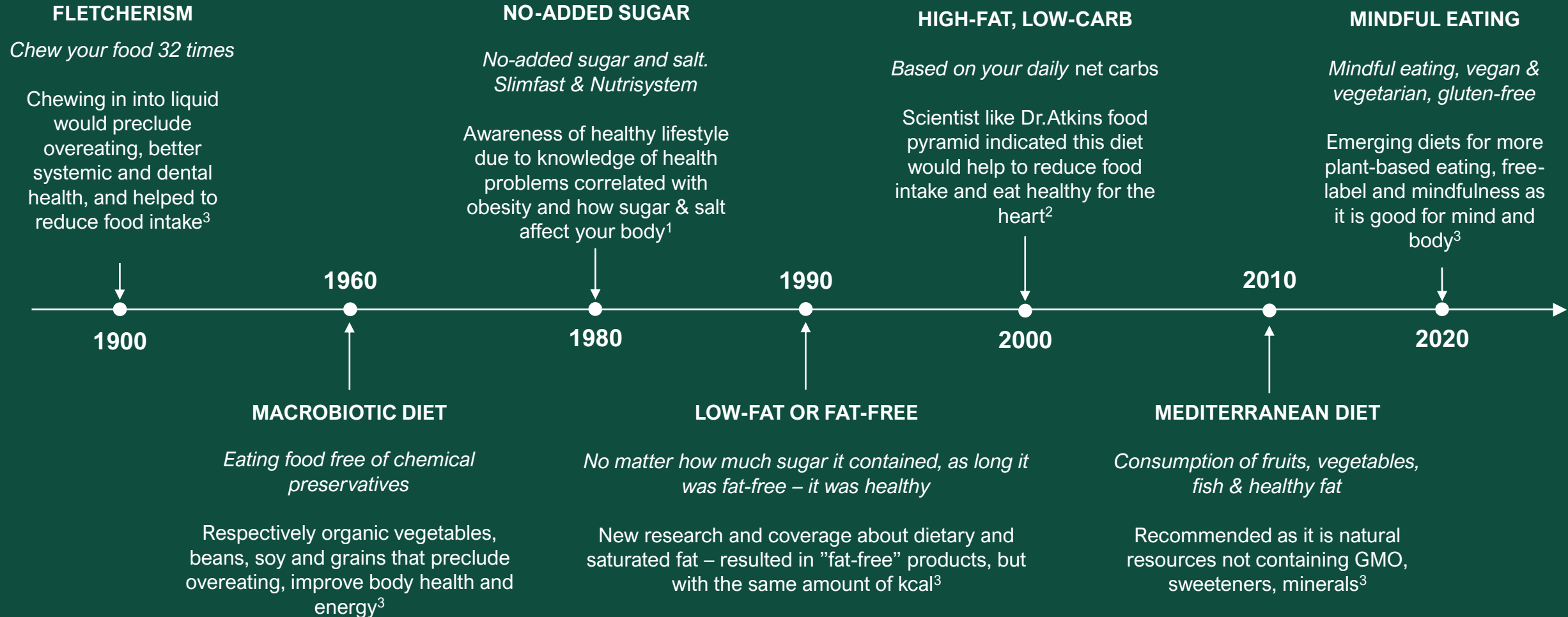
Two-sided market perspective

Food industry development

4dM8ZGrner8



During years, food industry went through various different phases



- Triggered by marketing media and food scientists, food trends are constantly changing³
- The forecasted diets from 2021 will remain mindful, but with a sustainable & healthy shift to both reduce overconsuming of food and for healthy body³

Food industry is a major contributor of the world major challenges and problems

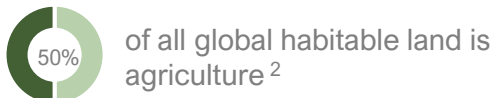
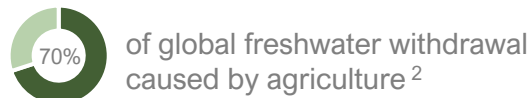
Three main types of challenges can be detected

Food industry is a major contributor to the world in resources and energy intensity. The industry is also one of the major polluter intensifying climate change through deforestation, waste, gas emissions. Finally, food consumption habits have huge impact on people's health²

Climate change / global warming



Food industry indicated as a major contributor to global warming²



Waste in the food supply chain



One-quarter of world agricultural area is used to produce food that is lost or wasted food²

If this land was a country it would be the **second largest in the world**
Accounts for **26%** of the world's **greenhouse gas emissions**²

Global emission in bn tn Co2

14

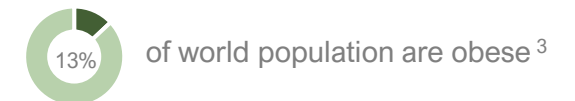
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Health problems



WHO (2020) states **health issues** as one of the **major future challenges** for humans³

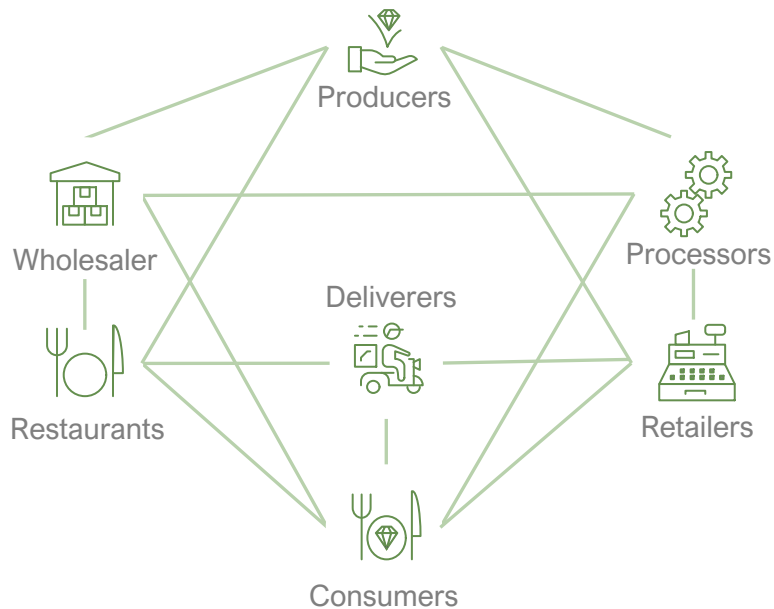
Rise in cardiometabolic diseases is linked to the **availability of unhealthy products**⁴



New developments is vital to stay resilient and agile in a changing environment

Development of food offerings is enforced by developed dynamic food ecosystem

DYNAMIC FOOD ECOSYSTEM



Expanded offering/ presence



Delivery & In-app ordering



Supply side expanding offerings to **address demand and market shifts**
Consumers have increased **use of delivery by 45% and in-app ordering by 51%**¹



Supply businesses needs to adapt to changing market trends – **with delivery predicted to have 3-4% market share by 2023**²



E-commerce / online presence



Businesses need to offer **simple and convenient offerings online** to cope with shifting preferences¹

Technology in supply chain



AI & Machine Learning



In a more smarter and continuously changing environment, **technology offers tools and innovation in demand forecasting, pricing and promotion**⁶



Traceability & Agri-tech



Growing importance of **transparency and consciousness through traceability** of ingredients, products and origin³



Innovation in agriculture have **improved efficiency and waste management**⁴

IMPLICATION OF COVID-19

Covid-19 has accelerated technology and digital shift due to safety, convenient and digital evolvement ⁵

Due to covid-19 consumers have shifted towards digital consumption and 35-45% stating this as the preferred future alternative⁵

Gaining advantages by developing solutions and products of anticipated demand

Development of food anticipated demand tackles two main concerns

Health awareness



Natural food & active lifestyle

Ecological awareness



Local consumption & sustainability

Demand drivers⁵

- Health & wellness
- Safety
- Clean diet
- Traditional values convenience, price & taste

- Traceability of food
- Social impact
- Climate footprint
- Local consumption

Innovation

- 88% of companies have introduced formulated products **supporting healthier diets** and lifestyle¹

- Innovate value chain** with production capabilities and M.L to decrease climate footprint⁴
- Align corporate values to consumers values¹

Examples



Introduced healthier products in nutrients and aiming towards natural food and active lifestyle. In addition, commitment to leverage marketing effort promote healthy cooking, eating and lifestyles³



Corporate commitment to **reduce usage of plastic in packaging by 50%**, and collect more plastic than they sell by **2025**²

By not being aware of consumer trends and values, could lead to negative impacts

Implications of health & ecological awareness towards food industry are enormous

Health awareness

This shift has rising as a trigger of food health nutrition science, influencers impact on behaviour and scandals affecting values and impression¹

More and more influencers

☞ Possess the power of influencing to inform, teach and communicate to eat healthier³

Examples: Jamie Oliver & Joe Wicks

Rise of plant-based lifestyle

☞ Plant-based lifestyle is growing due to enlightenment of vitamins, minerals and trends towards more plant, fruit based diet¹

Consciousness of nutrition & organic

☞ Food and nutrition science can learn which food is healthy and unhealthy for body and mind
☞ Organic food with no added GMO, sweeteners¹

Ecological awareness

This shift has emerged through ecological consciousness of e.g. climate change, food waste, and influencers impact on behaviour and scandals affecting values and impression¹

Boycott of animal tested products

☞ Scandals and greenwashing reveal how businesses exploit animal, and report false ethical numbers- leading to boycott of brands⁴

Conscious consumer activism

☞ Consumers are enlightened of how food value chain contribute to climate change, waste and emission⁵

More and more influencers

☞ Possess the power of influencing to inform and enlight cases of ecological matter⁵

Example: Greta Thunberg & Leo DiCaprio

Overview: Chapter 2

What is the current situation of the food industry?



The study of the food industry is proving the **relevance** of applying this industry to the study of this master thesis. As the bargaining power of buyers is high, suppliers need to **adapt to the changes in consumer preferences** to be **resilient**. The previous and current challenges of the industry provided first senses of the current consumer trends. In order to provide to suppliers accurate recommendations on how to become more resilient, a **deeper investigation** of the current consumer trends is required



Impact of changing consumer trends on the food industry

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



World economic development

Food Industry dynamics

Analysis of consumer trends

Recommendations on trend adaption



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

3. Which changing consumer trends shape the food industry?

3.1 Methodology	Contextual framework of research scheme
3.2 Qualitative prosppection	3.1.1 Supply (producer) side interviewees profiles and results <i>Farmers', Companies', Restaurants', Supermarkets' perspective on Globalization and consumer trends</i> 3.1.2 Demand (consumer) side interviewees profiles and results <i>Consumers' perspectives on Globalization and consumer trends</i> 3.1.3 Conclusion and implications from qualitative research <i>Points of con- and divergence of consumer trend perception</i> <i>Redefined marketing categories according to interview results</i> <i>Development of question sets for further research on consumer side</i>
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 <i>Redefined Ps according to qualitative interviews</i>



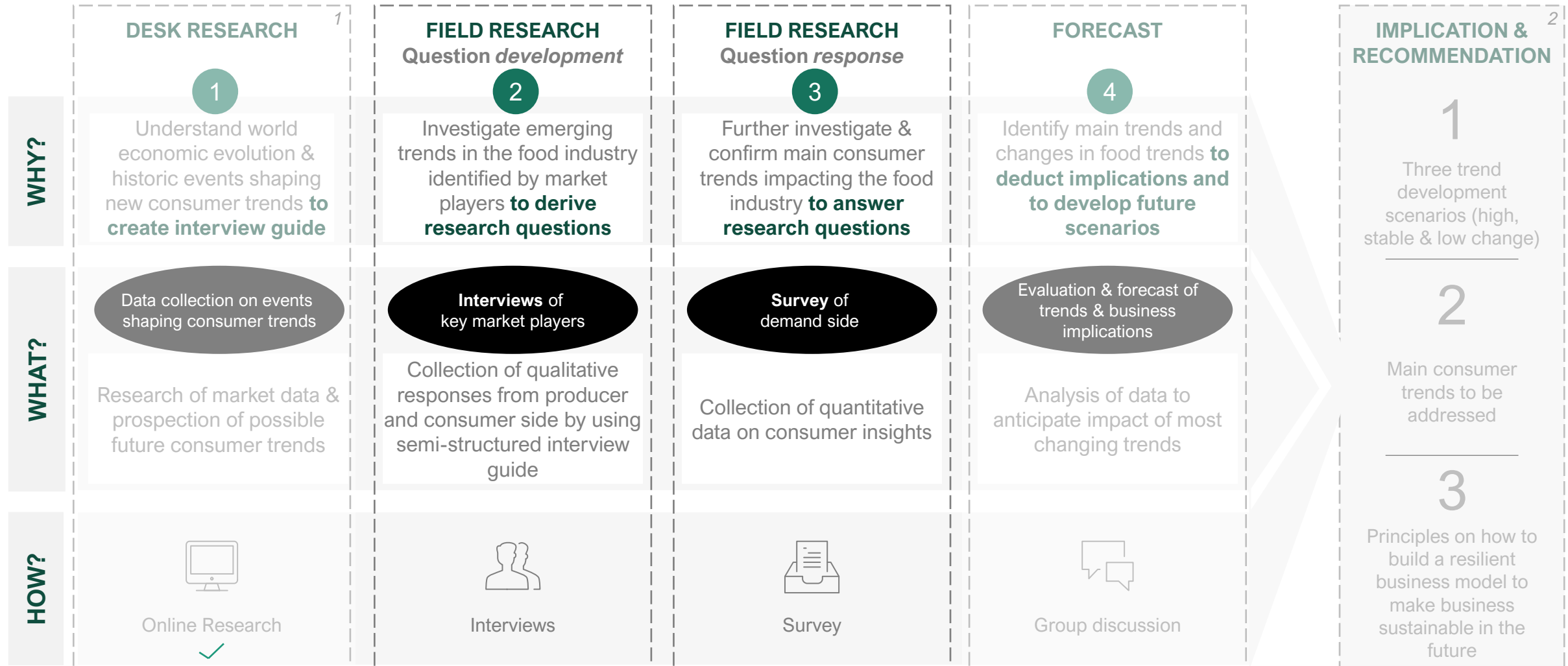


3.1 METHODOLOGY

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



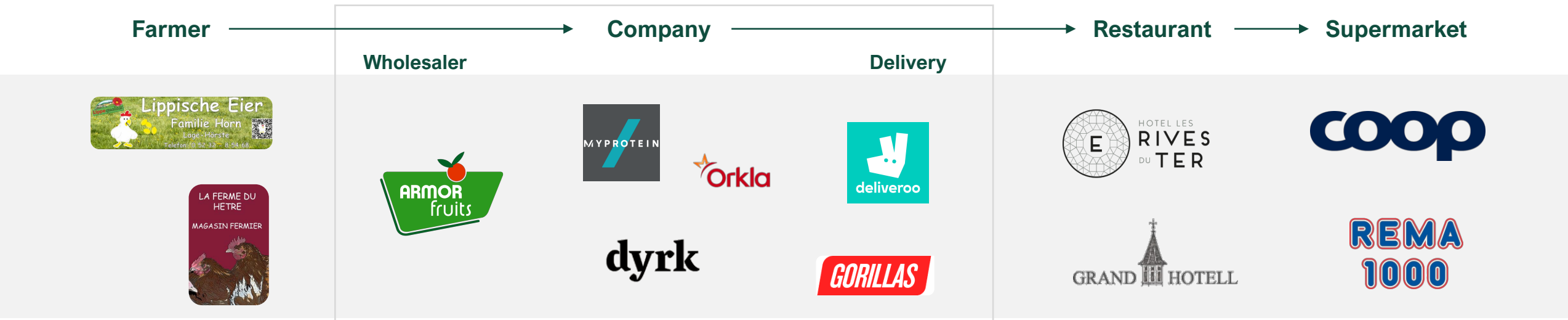
3.2 QUALITATIVE PROSPECTION

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' perspectives²** 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 Germany¹

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.**”*

SEBASTIAN HORN – Farmer: Landwirtschaftlicher Betrieb Horn

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

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”*

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.”*

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.”*



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	- Exchange of specialized material - Inequality due to different national regulations	- Increased interconnectedness and technological development enable SMEs to compete - Increased pressure on big food companies to adopt standards - Rising online or even online-only distribution	Heading towards shorter supply-chains, local production and eating local	Selection of food products from all over the world due to increased (sometimes overwhelming) international transport of goods and products Appreciation of broad-based taste experiences of smells, tastes, experiences and cosiness
Perceived Consumer trends	- Increased purchases directly from farmers - Growing offer of vegetables - Shift in perception and mindset of generations (Gen Z, Y and Baby Boomers focus: regional food production and sustainable products)	- Expanding offer of healthy nutrition products - Growing product segments: protein, vegan food supplements and vitamins for specific consumer desires: good health, immune system support and sleep quality are - Implementation of zero-waste, ecological and clean labels	- Increased focus on seasonality and freshness on menu - Importance of cooking in sustainable way	- Rising focus on healthier, low shelf-life products - Large network of distributors - Increased brand awareness and knowledge of products - Growing trend towards brands that offer biological/ organic and clean label - Growing importance of ethical production
Supply side trends & developments	- Implementation of regenerative Agriculture to assemble Humus - Increased focus on company logo, certification and packaging	Focusing on minimizing waste of plastic and packaging	- Started cooking local and offering traditional dishes Demanding transparency of origin (e.g. import a chicken from Austria and processed in France have French label)	- Increased concerns about and actions implementing reusable items to participate in movement of zero-waste Donating unsold products to associations

■ 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**¹ & seem to illustrate **varying importance levels** along supply chain

	Farmer 	Company 	Restaurant 	Supermarket 
Marketing categories				
 People	Familiarity	No major focus	Positive atmosphere	Routines
 Packaging	Certification, reusable material, paper packaging	Less plastic, convenient format, sustainable	Standards to reduce plastic	Reusable packaging, taste the waste ①
 Product	Healthy, regional, bio, organic, local	Sports nutrition, health (sleep), vegan, local	Seasonal, fresh, local, bio, organic	New categories: bio/organic, health ②
 Place	Direct from farmer	Distributors assessed on time, quality, sustainability	Local producers – minor: big wholesaler	Large network, good quality ③
 Production	Own seeds, plant based	Sustainable, ethical	Sustainability standards	Emphasize agriculture ④
 Promotion	Social media, shopping streets	-	-	-

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

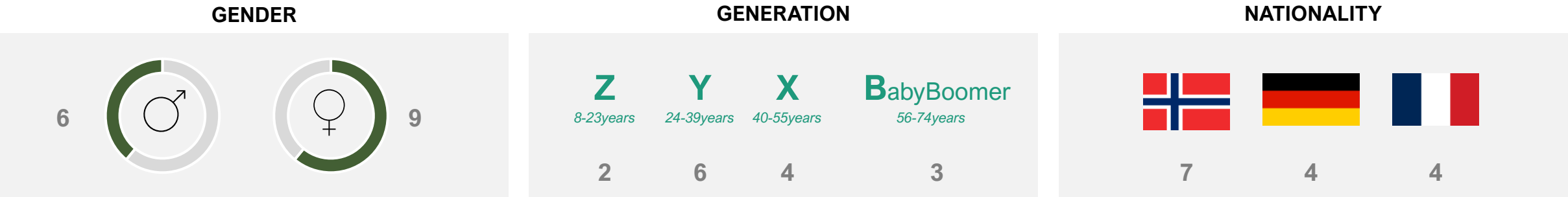
References: (1) (Afridi 2009,137-143), Appendix: Excel file: Qualitative study & analysis: (Huebner, Loisel & Guddal 2021-1)

Demand side respondents profile consists of 15 persons with various backgrounds

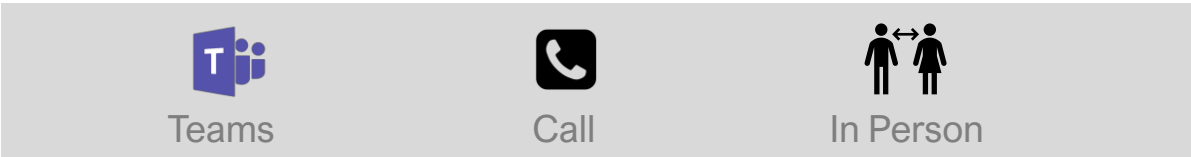
Nova

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

RESPONDENT PROFILES



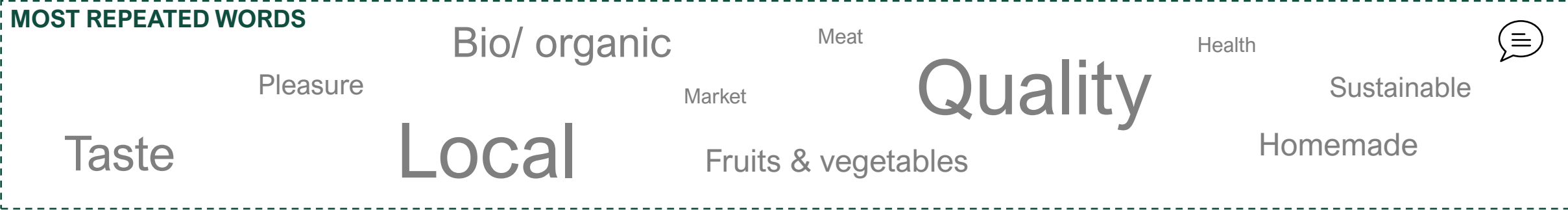
EXECUTION METHOD



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 ¹	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				LOW
 Packaging	Not concerned about packaging	6	Concerned about packaging	8					HIGH ①
	Taste	Origin	Bio	Appearance	Fresh	Price	Seasonality	Vegan	HIGH ②
	Supermarkets	Category stores	Local markets	Farmers	Bio supermarket	Own gardening activity		HIGH ③	
 Production	During interviews, the term of ethical production 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

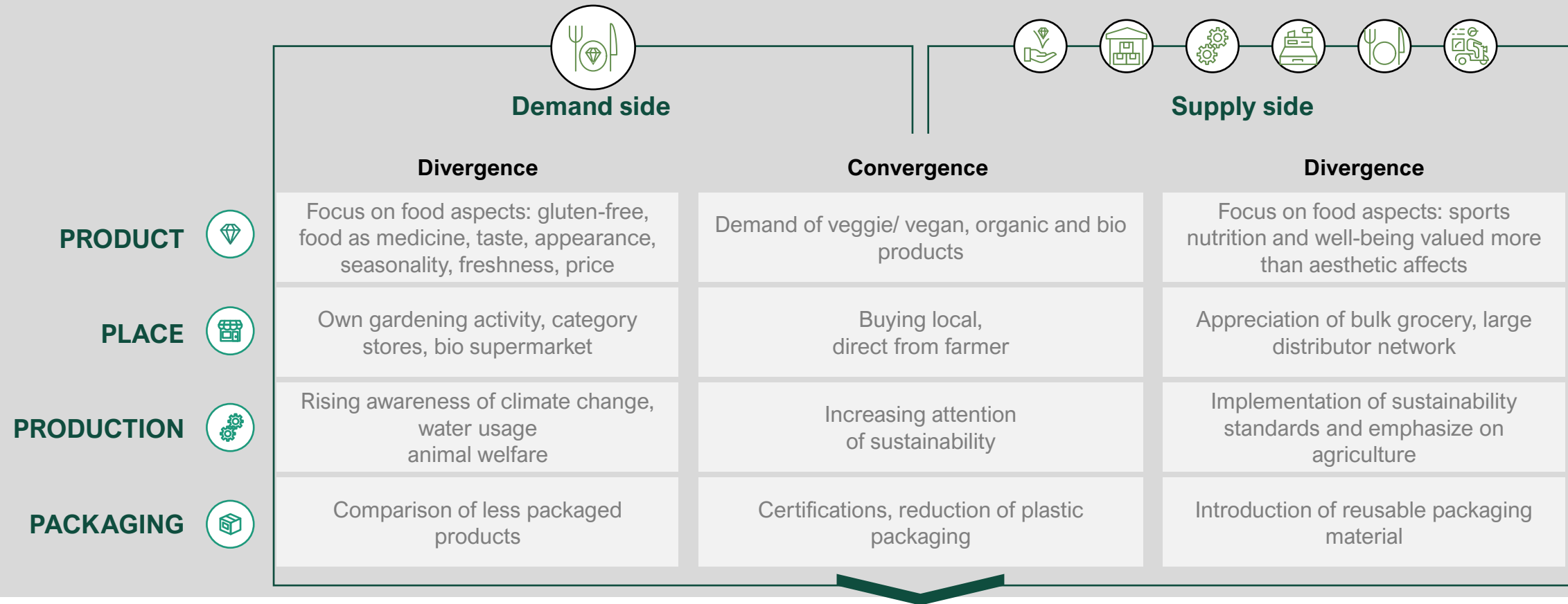


First senses of what are most important consumer trends led to decisions on investigating categories ① “**product**”, ② “**place**”, ③ “**packaging**” deeper through quantitative interviews. Furthermore, another category to investigate identified: Ethical food ④ “**production**” processes.

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

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

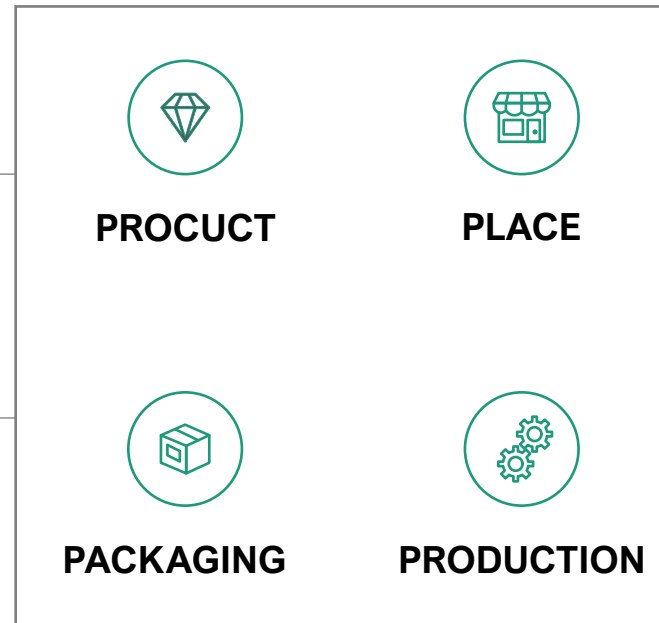
IMPACT OF DEGLOBALIZATION

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 Ps¹)

1. Which

2. Which



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

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



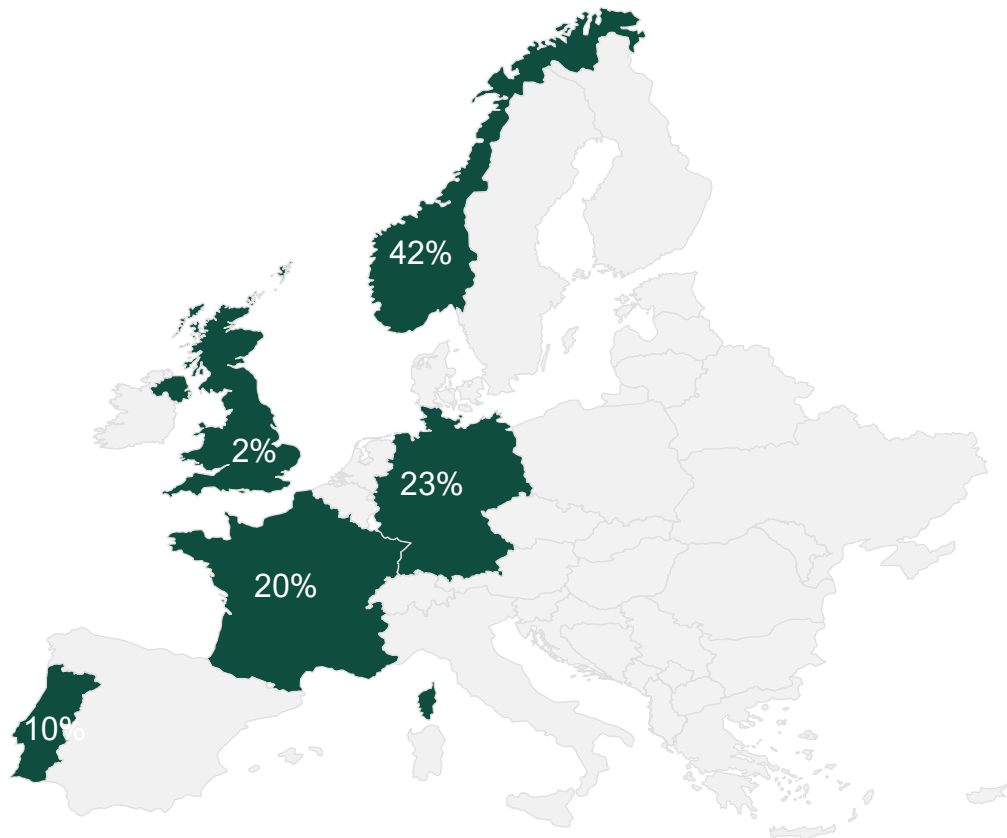
3.3 QUANTITATIVE VERIFICATION

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



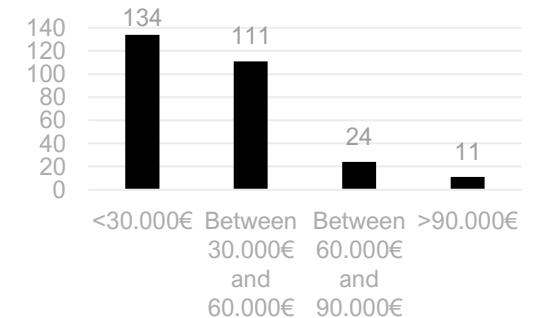
GENDER



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

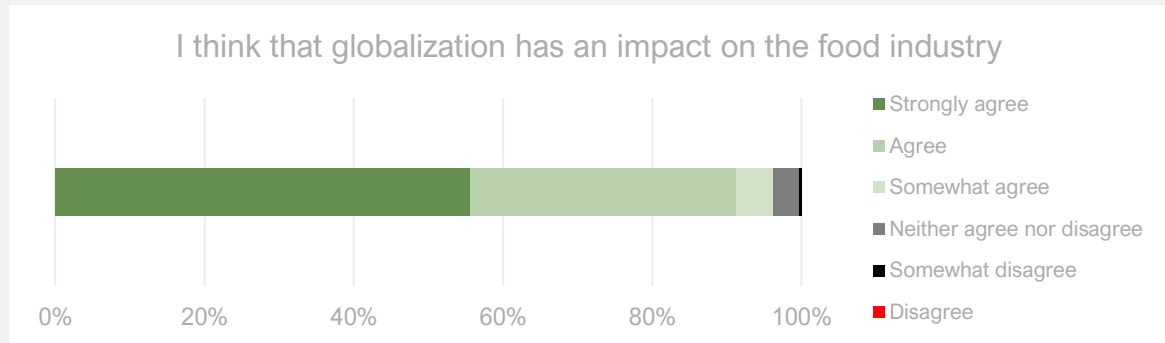


References: (Gillham 2008, 15-49), Appendix: Excel file: Survey (Huebner, Loisel & Guddal 2021-2), Qualtrics survey “Deglobalization of the Food Industry”

Respondents evaluated impact of Deglobalization on food industry

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

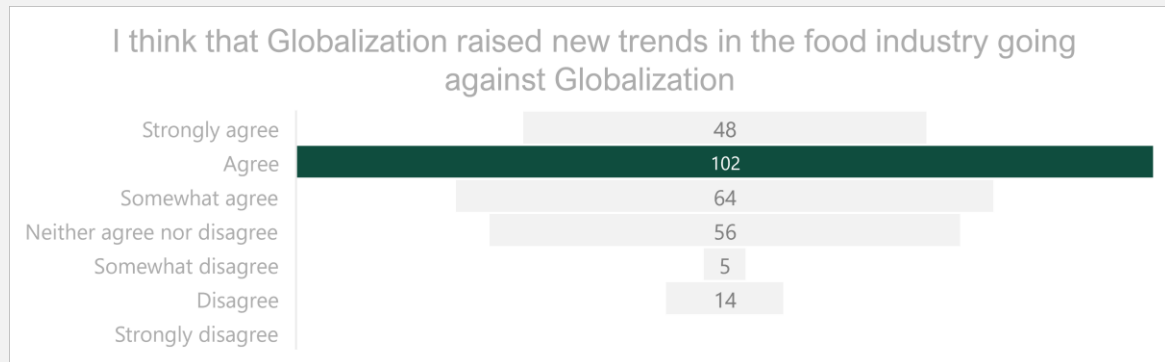
1. Globalization has an **impact** on the food industry



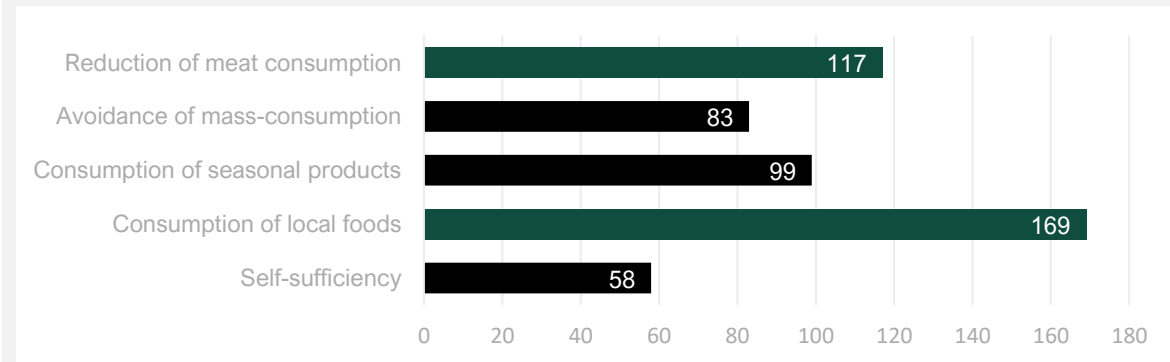
2. Consumers **changed their diets** within the Deglobalization phase more often than ever before (e.g. during Globalization phase)



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**

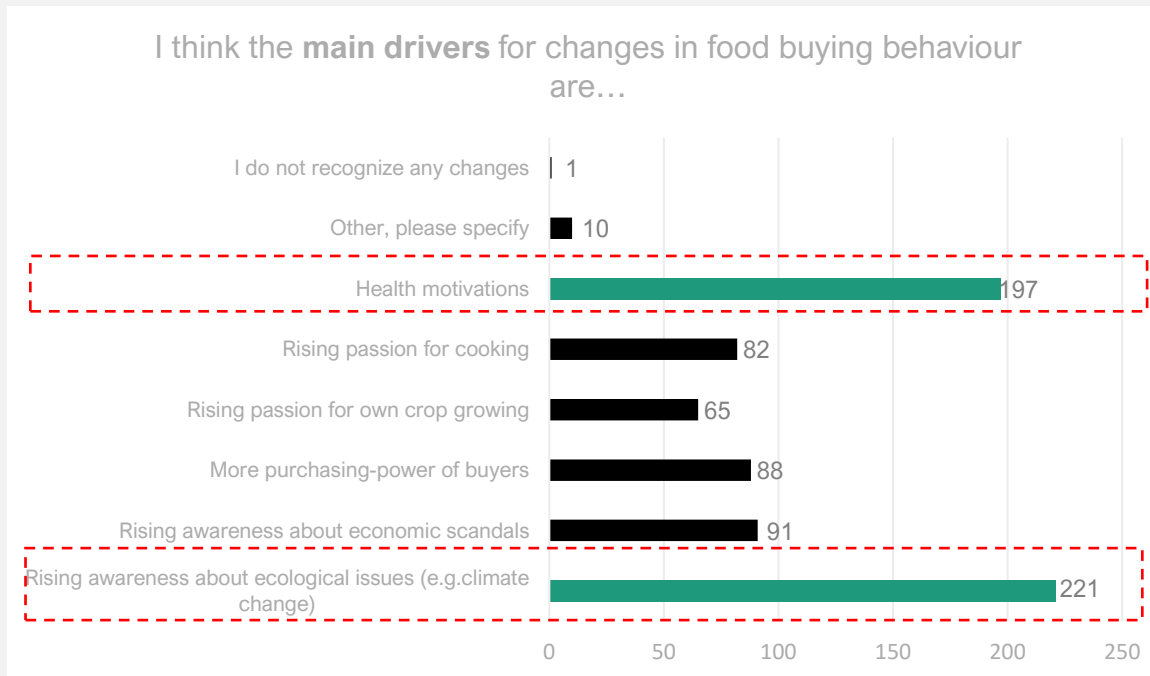


➤ Yes! Deglobalization has an **impact** on the food industry and **raises new trends** going against Globalization.

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



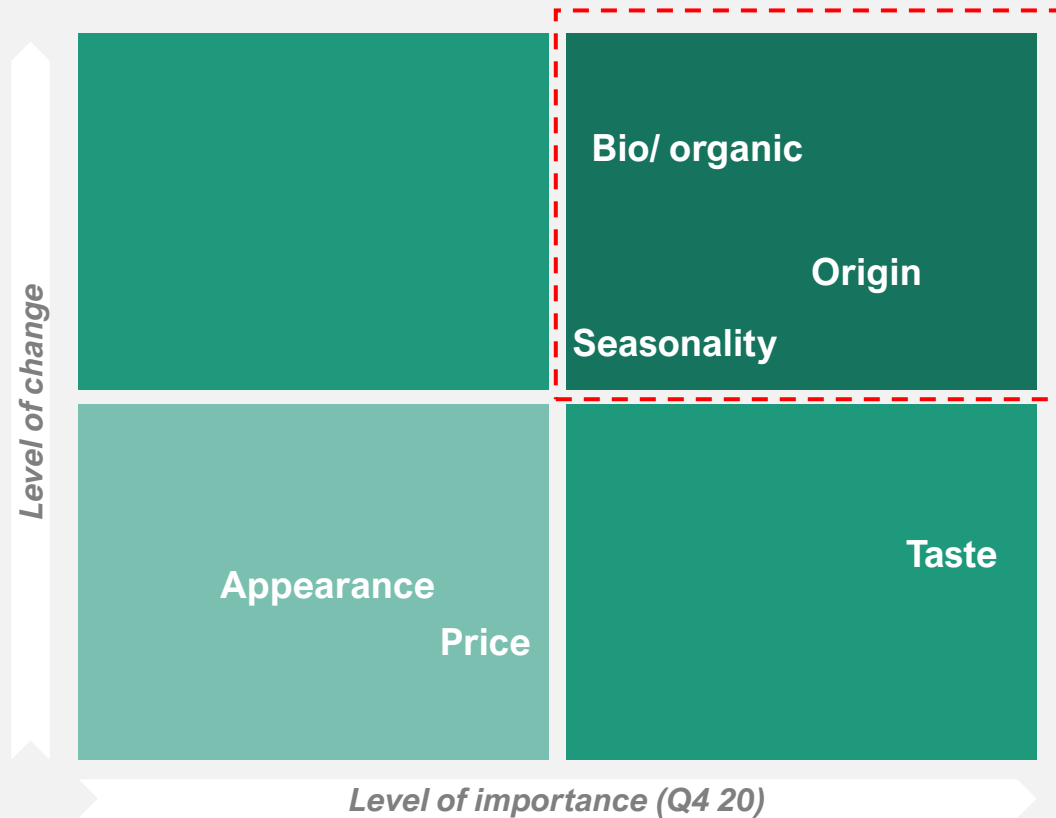
Health motivation and rising awareness about ecological issues are most relevant drivers for change as they are raised by majority of respondents

➤ 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



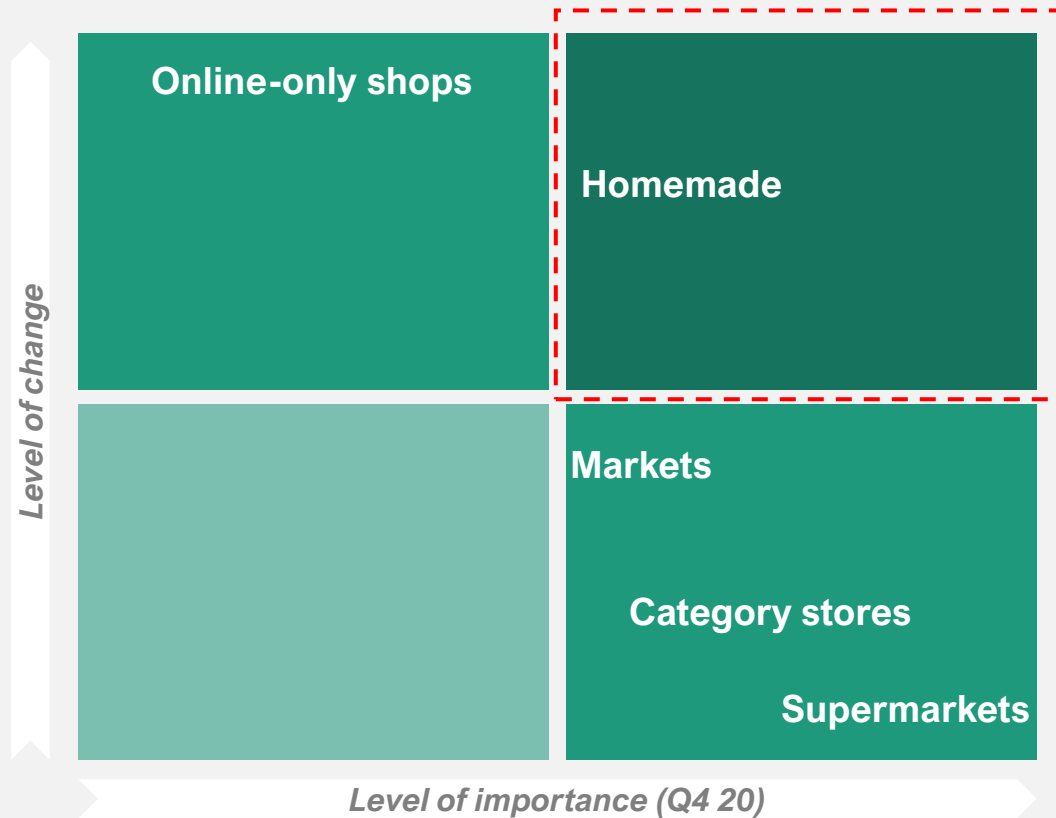
➤ Trends within category “product” manifest changing importance from “taste” to “**bio/ organic**”, “**seasonality**” and “**origin**”.

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

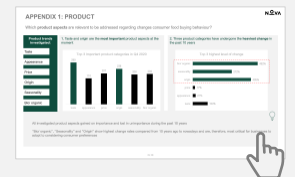
Places for food acquisition indicate strong alteration towards self-sufficiency

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

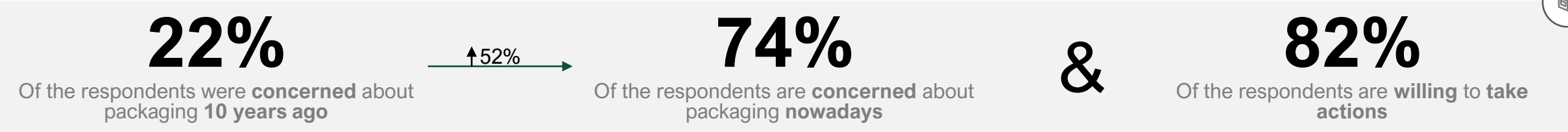


➤ Trends for “place” underline trend from buying at supermarkets to **homemade** and **online delivery**, reinforcing Deglobalization of food industry.

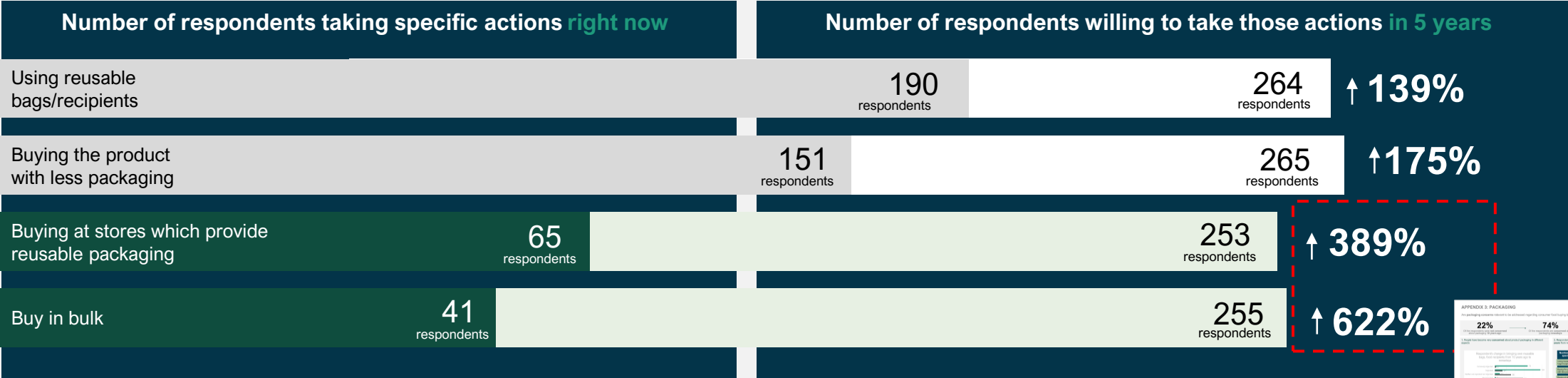
References: Excel file: Quantitative data & analysis: Deglobalization of the Food Industry, (Hambrick, MacMillan and Day 1982, 510-531), Appendix 2: Place

Packaging rises immense awareness and concerns questioning convenient packing

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



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



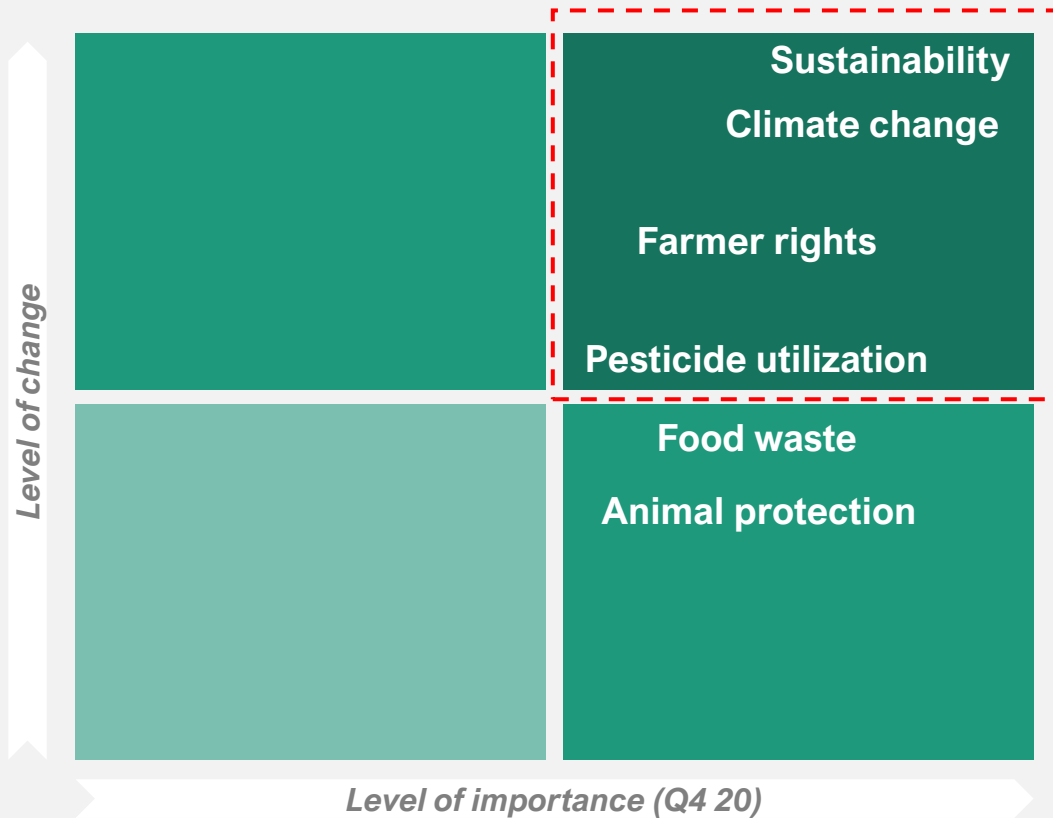
➤ Trends for “packaging” stress extreme change from low concerns towards concrete actions to combat unsustainable packing.

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

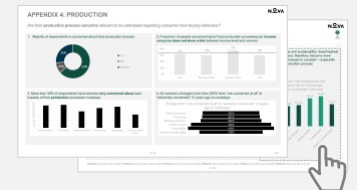


64%

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

>200%

Positive change rate for each production concern over past ten years

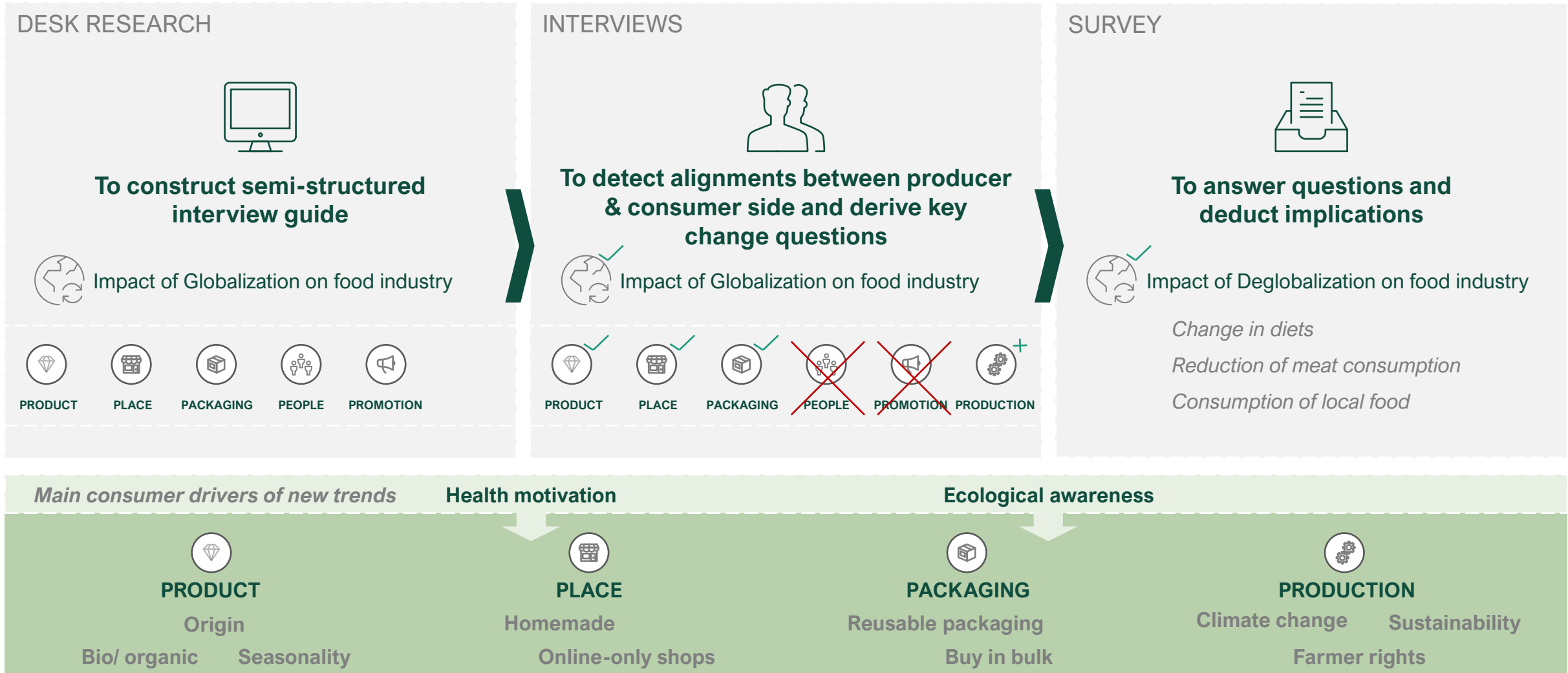


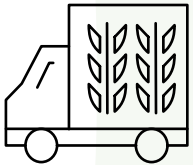
➤ “Production” is a high changing category with various concerns highly important to consumers and, therefore, might steer business strategies.

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

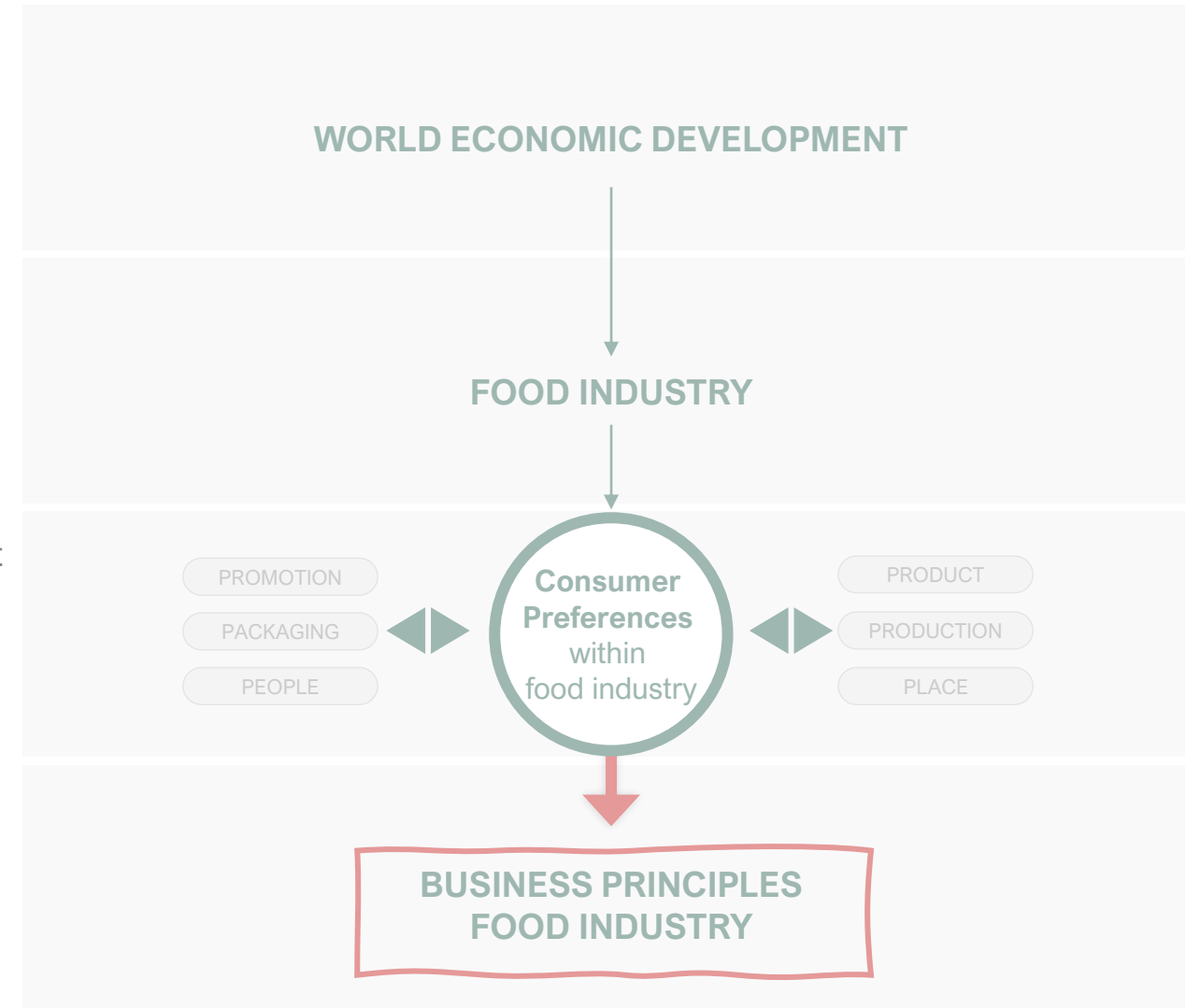
Which changing consumer trends shape the food industry?





Recommendations for strategies to respond to consumer trends

Development of trends within categories, most important consumer trends, recommendations for businesses to adopt to trends



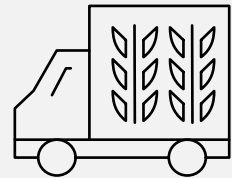


World economic development

Food Industry dynamics

Analysis of consumer trends

Recommendations on trend adaption



Recommendations for business strategy to respond to consumer trends

4. How can businesses in food industry respond to consumer trends in order to become resilient?

4.1 Development of trends within categories

- 4.1.1 Food **categories** that are most relevant in future
- 4.1.2 Scenario planning of **trends** within each marketing category

4.2 Most important consumer trends

- 4.2.1 Trends which are crucial to respond to: within categories analysis
- 4.2.2 Comparison of trends with Euromonitor
- 4.2.3 Development of persona

4.3 Recommendations for businesses to adopt to trends

- 4.3.1 Best business practices
- 4.3.2 Overview of implementation practices for supply side



4.1 Development of trends within categories

References: (Rosa 2020)

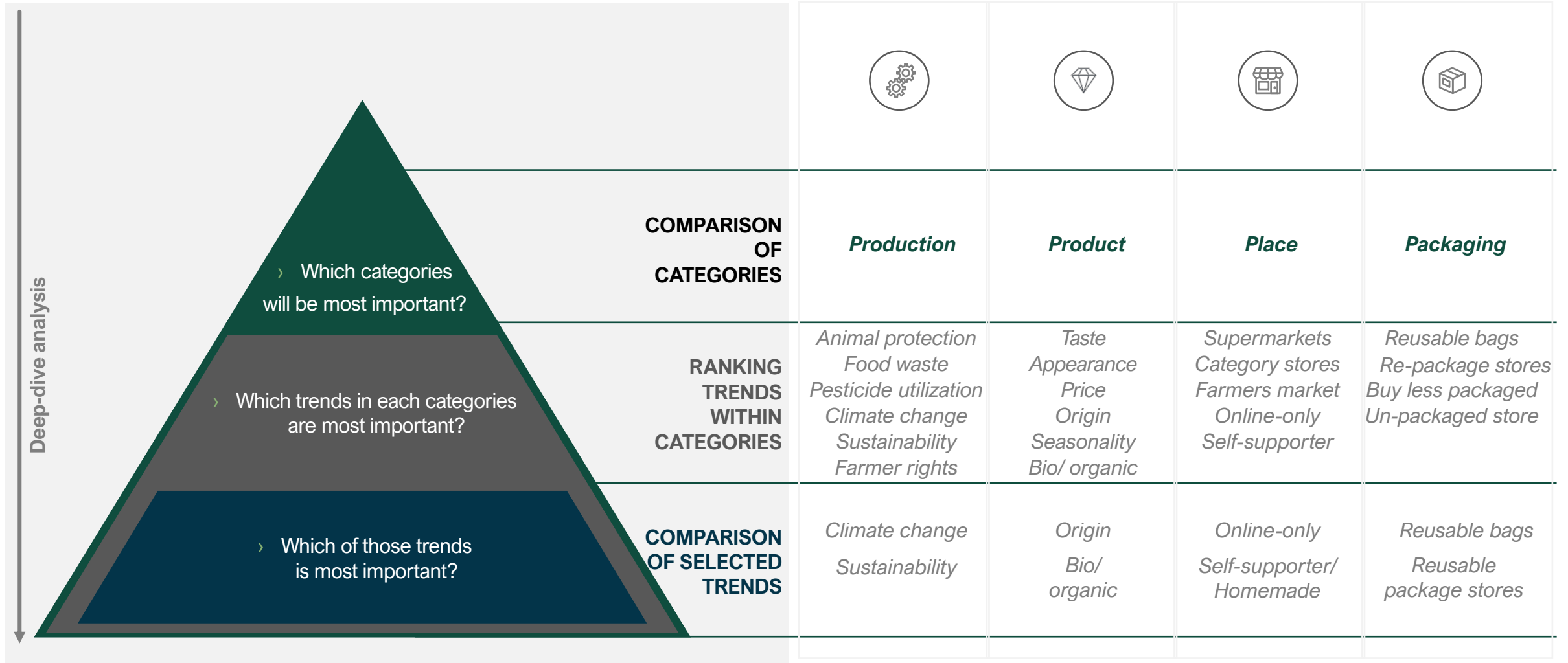
Development of trends within categories

Most important consumer trends

Recommendations to adopt to trends

Pyramid format is used to showcase deep-dive scenario forecast structure

Top-down category & trend deep-dive with three different trend scenarios reveal most critical consumer importance levels and change rates



Comparison between focus categories points out urgent need for action

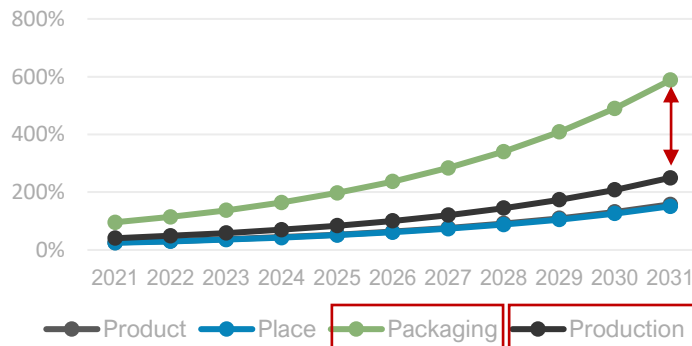
Even though all **categories** show high importance, “packaging” and “production” are expected to undergo strongest change

CATEGORIES

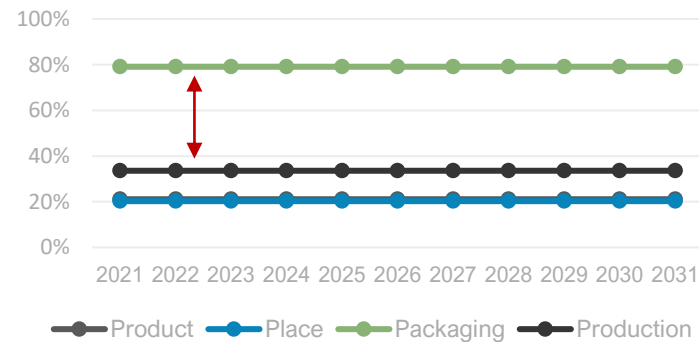
Qualitative as well as quantitative analysis show that **all categories are perceived as highly important** by respondents. Evaluating focus categories in **three different important change scenarios**, forecasts which categories will reveal highest importance change levels. Therefore, these could be considered as **high potential categories** for future business strategy – and should be used to outperform competition during **next ten years**.



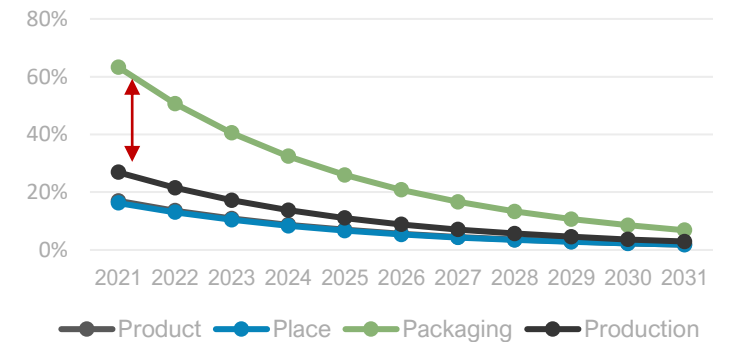
High change rate (*1.2)



Stable change rate (*1)



Reverse change rate (*0.8)



TAKEAWAY

Crucial to start focus on **improving on four focus categories as soon as possible**

Most realistic scenario: high change rate of 20% - as average yearly change rate was 35.6% over past ten years

In order to stay compatible – or even outperform competition, business should be targeting “**packaging**” and “**production**” optimization. Even if change rate does not change during next ten years (stable change rate with factor *1), packaging and production will have 60% and >10% **higher change rate** compared to product & place, respectively

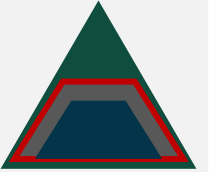


Depiction of most important change rates of trends within categories – 1

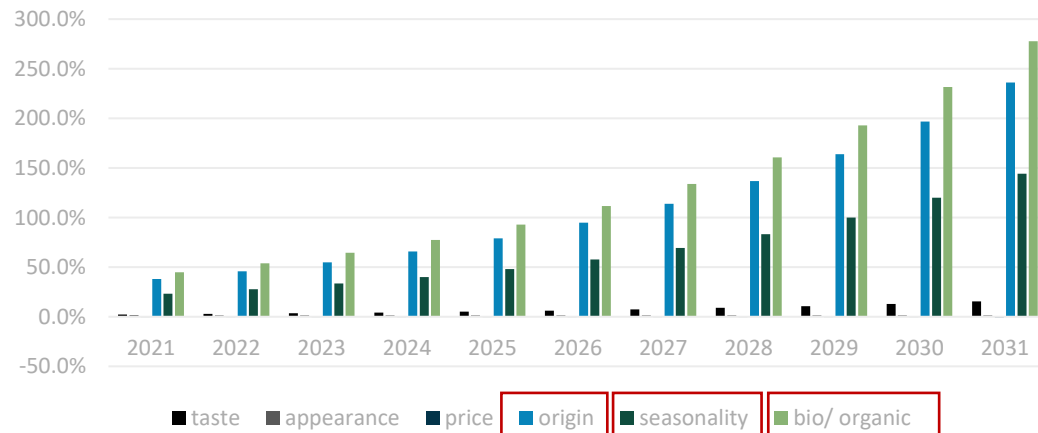
Product and place display four major trends which forecast highest importance change¹

TRENDS WITHIN CATEGORY

Within category “*product*”, consumer awareness trends “origin” and “bio/ organic” show the highest importance rates – increasing per year. Within the category “*place*”, consumer interests on their way to buy food is rising most in “online-only shops” and pursuing “self-supporter”.



PRODUCT¹



PLACE¹



- Bio/ organic, origin and seasonality show highest change rates which is in line with qualitative research projections
- Product taste prevailed already high base-line of importance 10 years ago. Therefore, importance increase for this trend is relatively low
- Appearance and price hold relatively stable importance over time

- Online-only shops exhibit highest importance growth– aligned with current technology focus and growth
- Supermarkets reveal to having lowest increase in importance level – however, base-line of importance/usage was already relatively high and displayed highest usage

References: Appendix: Excel file: Scenario analysis: (Huebner, Loisel & Guddal 2021-3), ¹: using highest important change factor = *1.2

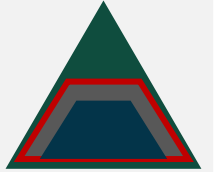
Depiction of most important change rates of trends within categories – 2

Packaging and production display four major trends which forecast highest importance change¹

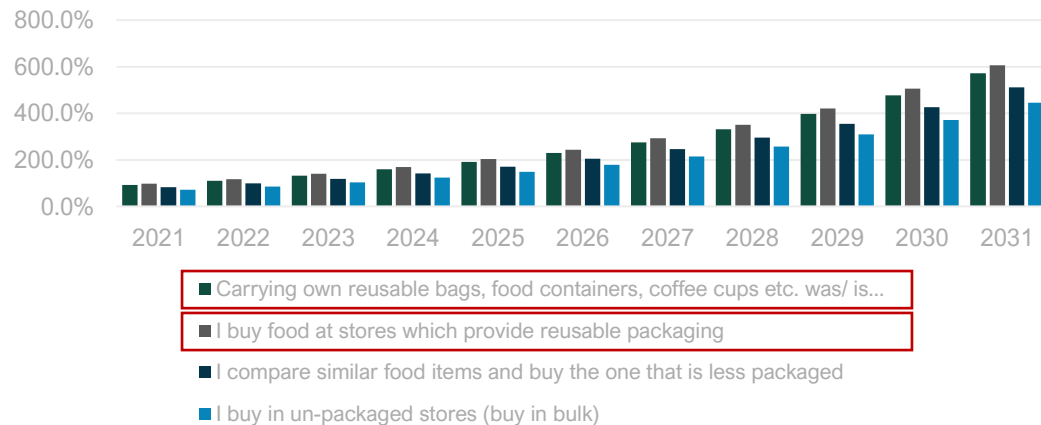
TRENDS WITHIN CATEGORY

Within the category *packaging*, only minor differences between the consumer awareness trends are observed. Two highest ones are “using own reusable packages” and *buying food in stores using reusable packaging*.

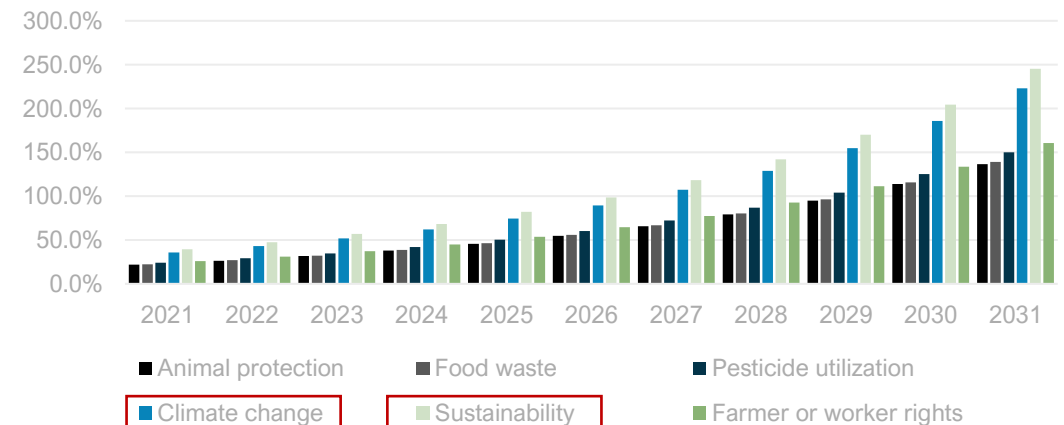
Within the category *production*, the two major consumer concerns investigated are *climate change* and *sustainability*.



PACKAGING¹



PRODUCTION¹



All trends forecast relatively similar increase in importance to end-consumers
Comparing with trends from other categories, packaging trends reveal almost all a higher than 100% importance level increase reached in 2021
Using own reusable packaging and buying food at stores which provide reusable packaging will be slightly more increasing on importance

All stated production trends/ concerns are evaluated as very important to end-consumers
Importance increase higher than 100% will be reached between 2026 & 2029
Climate change and *sustainability* raise highest level of concern which is predicted to intensify even more within next 10 years

Major trends reveal critical importance of early business action

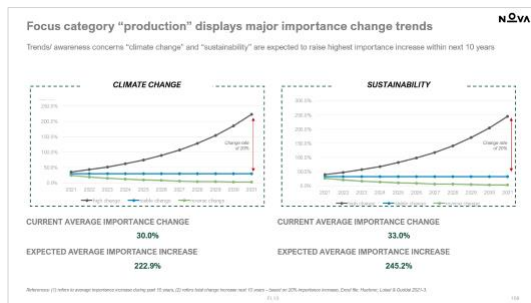
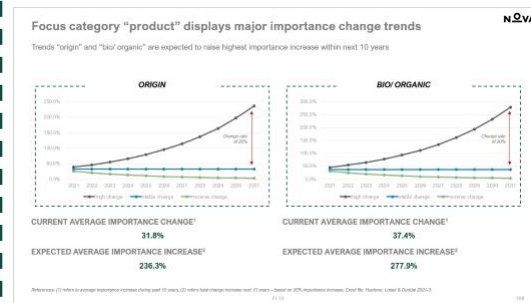
Analysing two main important trends of each category shows most likely scenario: increase change rate (by 20%) as key indicator¹

FOCUS TRENDS

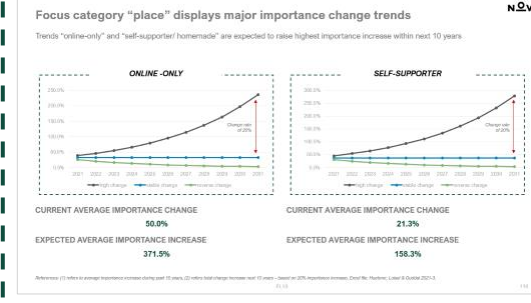
Using trends that are expected to entail highest importance change rates within each category, a 20% change increase already shows immersive differences of importance level to consumers within next 10 years.



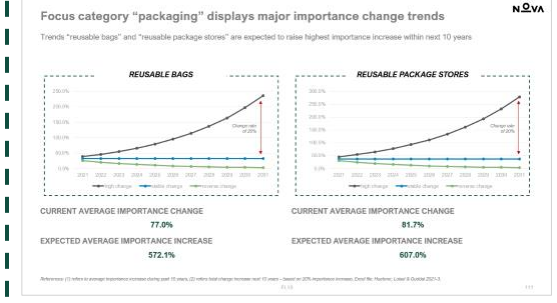
Production

**Product**

Place



Packaging



TAKEAWAY

ACT NOW

- Business/ supply side early adoption is key to keep up with competition and become/ stay attractive for current as well as future consumer
- Growing importance of building agile business and concomitant marketing strategy

ACT RIGHT

- ☛ Prioritisation of categories in following order: production, packaging, place and product
- ☛ Focus on trends showing major importance increase: climate change, sustainability, origin, bio/ organic, online-only, self-support/ homemade, reusable bags and buying at reusable stores (two of each category)



References: Appendix: Excel file: Scenario analysis: (Huebner, Loisel & Guddal 2021-3), 1: using highest important change factor = *1.2



4.2 Most important consumer trends

References: (Phon 2020)

NOVA

Comparison of literature trends to thesis' analysis trends reveals main alignments

Research for assimilation between global consumer trends from Euromonitor's imbed investigated trends

8 trends proposed by thesis analysis		Reusable packaging								Sustainable production								Climate friendly production								Bio/Organic products								Usage of own Reusable bags								Origin of products								Homemade crops								Online only purchases															
Euromonitor's consumer trends	High assimilation	CONSCIOUS CONSUMER																																																																I WANT IT NOW							
		PLASTIC-FREE WORLD																BACK TO BASICS																																																							
	Low assimilation	EVERYONE'S AN EXPERT																																I CAN LOOK AFTER MYSELF																																							

TAKEAWAY



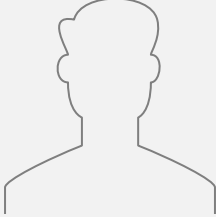
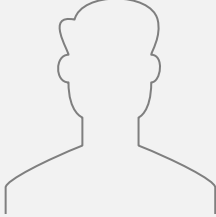
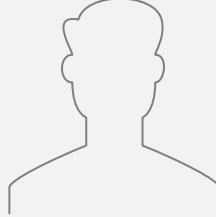
Trends selected by Euromonitor are confirmed to be relevant by trends grouped in different marketing categories (redefined four Ps)
Conscious consumer trend in Euromonitor reveals to be widely comparable with many trends selected



References: (1) (Angus and Westbrook 2019)

Three main persona embrace all major trends to focus on

Critical trends grouped into three main persona types reinforce each other and are not mutually exclusive

			
	Responsible consumer <i>« I am extremely concerned about the current issues in our world: climate change, animal protection and I strive to be a better person through my consumption of food. »</i>	Technical savvy consumer <i>« I am an extremely busy person and do not want to fill my free time shopping and cooking. Therefore, I am looking for the most convenient option to get supplied. »</i>	Authentic consumer <i>« Consuming food that is coming from all corners of the world is a non-sense. I focus on getting food from local suppliers, respecting seasons and supporting local economy. »</i>
Trends	Bio/organic Reusable package stores Sustainable production Climate change	Online only	Origin Homemade Reusable bags, containers
Behavior	Ethical	Digital consumption	Minimization of materialism
	Environmentalist	Convenience	Local consumption
	Health	Rapidity	Self-sufficiency

Putting all trends into three nutshells, each focus category points out different trend aspects which are framed into three persona describing future end-consumer. Companies should use these to guide and align business strategy and especially marketing strategy



4.3 Recommendations for businesses to adopt to trends

In trends' adaptation, early and continuous actions prevail on short reactions

To better understand how businesses can comply with consumers' trends, cases of companies already taking initiatives have been studied



Product adaptation Danone Case³

Started 13 years ago, Danone pursues product expansion to provide **more organic offering**



Started in 2007, **first** organic product: '**Les 2 Vaches**'



Launched **many** brands of Danone: Activia, Danonino



Long process as still planned to extend to new products



Dependence on producers to switch to organic farming



Going beyond: launch of new brand marketing organic products respecting **people, animals & planet**



Differentiated product launches according to specific **market's readiness**



Production adaptation Nutella Case⁷

Nutella engages in **sustainable palm oil** and **no deforestation actions**



Scandal of palm oil usage in Nutella's products



Cause of rainforest, ecosystem **destructions**, gas emissions



In reaction, Ferrero and Nutella **complied** with **RSPO certification**



100% traceable palm oil
Sustainable by coming from regulated plantations



Developed measures **beyond** certification



Internal chart to work together with local actors
Disclosing regular updates on supply-chain



Member of a general work group formed of NGOs



Place adaptation HEINZ Case⁸

Kraft Heinz Australia has launched a **DTC channel**, Heinz to Home



E-store retailing two types of Heinz's products package



Enhance **brand's attachment** of customers



Omnichannel distribution to make sure consumers can get Heinz's products **when they want**



Trend **confirmed** by lockdowns



In-depth customer data can be captured, total **power** on the distribution



In-house development allow leveraging **end-to-end capabilities**



Packaging adaptation Nestlé Case⁹

Nestlé aims to reach **100% recyclable or reusable** packaging by 2025



Recognized **urgency** due to ecological impact of packaging



Three main areas:

- Eliminate non-recyclable plastics
- Promote the usage of better-recycling plastics
- Re-consider the complex materials' combinations of product packaging



Need to develop a **circular economy**

- Participation in development of recycling schemes
- Working with partners
- Labeling to help consumers
- Promoting recycled plastics

Do's and Don'ts serve as key guideline to develop a resilient business model

During supply side interviews, different best practice tools were brought up within food industry participants



Healthy, organic food

Online distribution

Agile (usually Start-up)

Online marketing

Digital payment

VS



Junk food

Only offline distribution

Stiff (usually Enterprise)

Offline marketing

Cash payment



➤ Businesses need to adopt Do's in an agile manner and become resilient to dynamic change!

Implementation practices for investigated supply side are composed

Each part of supply side needs to adopt to categories differently

	Farmer 	Company 	Restaurant 	Retailer 
Product 	 Differentiation with unique product offering based on bio, organic	 Diversification of portfolio Product innovation: certified organic, natural products	 Diet ¹ -friendly menu Working with local producers Respect seasonality	 Promote product traceability Retailing from local producers Extend bio/ organic offerings
Place 	 Click & collect digital platform Developing direct partnerships with retailers	 Delivery of home-kit (doing it yourself)/ e-commerce	 Home-delivery of food or food take-away offering	 Launch of online grocery Implementation of delivery and/ or drive-in
Packaging 	 Less or non-use of unsustainable packaging	 Zero non-recycled plastics Cooperate with partners to develop new solutions	 Limit non-recyclable plastic Reusable food take-away containers	 Limit non-recycled plastics Promote reusable packaging Provide buy in bulk shopping
Production 	 Organic production, non-GMO Respect of soils, seasonality , animal-welfare	 Fair share of earnings with producers Implementation of quality KPIs	 Limitation of food waste Implement food donation process	 Discounting or donating to food bank close expiry dates' products

References: (1) diets refer to respondent diet portfolio

How do changes in consumer trends based on Deglobalization impact business models in the food industry?



05

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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

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Word document

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Figure 2: Geographical average kcal/capita/day (food balance)

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Figure 3: Market value forecast 2019-2024 (in bn USD)

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Figure 4: GLOBALIZED FOOD ECOSYSTEM

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Figure 5: DEGLOBALIZED FOOD ECOSYSTEM

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Figure 6: Demand for food products global CAGR (2018-2023)

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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: Globalization	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: Consumer trends focuses on food consumption trends (other) developments (more concerned about the Ps in specific)	Place – 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?)
		Product offering – 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
		Packaging – 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?

		Production – sustainable	Which emphasis do you place on your food production? Which influence does globalization / deglobalization have on your way of production?
		People – 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	What does food mean to you? Do you like to go out? Order food? – Did that change? Does food play an important role in your life?
2	Main part - focuses on food consumption trends (other) developments (more concerned about the Ps in specific)	Place - Where to buy? - Store selection (local farmer vs. big supermarket chain) - Buying frequency. How often to buy? Product - Food trends – Eating - What to buy? Product selection -GMO modified -No sugar -Organic -High protein -Vegetarian -Vegan Packaging - Non-Plastic -Fair-trade -Reusable	Where do you buy your food? And why do you decide to buy it there? Did the place / store you buy your food change over the time? What kind of food do you buy most often? (did that change over time?) What are the most important product aspects / indicators to you? (did that change over time?) Overall: Do you see any emerging trends in the food industry? (Do you evaluate those as short-term trends or long-lasting?) Are you concerned about product packaging? (Have you always been aware of that?) Does the product packaging influence your decision-making process?

		People -Importance of customer service provided Most important aspect that influences your buying decision. Did that change in the past years?	Do you pay attention to working conditions of employees of companies you buy / order food from? In general: what are your major concerns to make buying decisions? – Did that change over time? /
3	Addition – Globalization	Perception of globalization Impact of globalization Impact of Covid	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? Do you think that the food industry is affected by globalization? Do you think that reverse globalization is accelerated by Covid19? Did Covid19 change your action / perception in terms of food buying / consumption behaviour?
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?

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

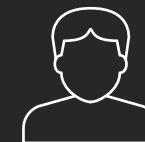
During our interviews and survey distribution, respondents showed high interest and raised concerns about Deglobalization of food industry

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, weil 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

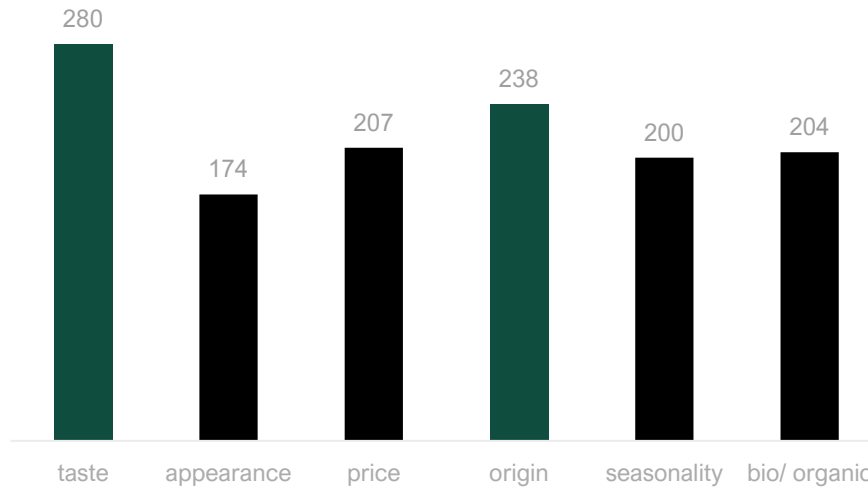
Origin

Seasonality

Bio/ organic

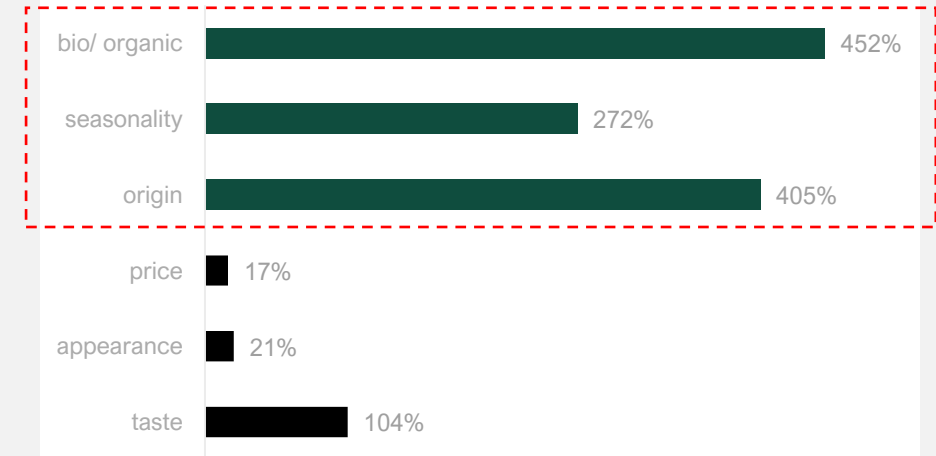
1. Taste and origin are the **most important** product aspects at the moment

Top 3 Important product categories in Q4 2020



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

Top 3 highest level of change



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

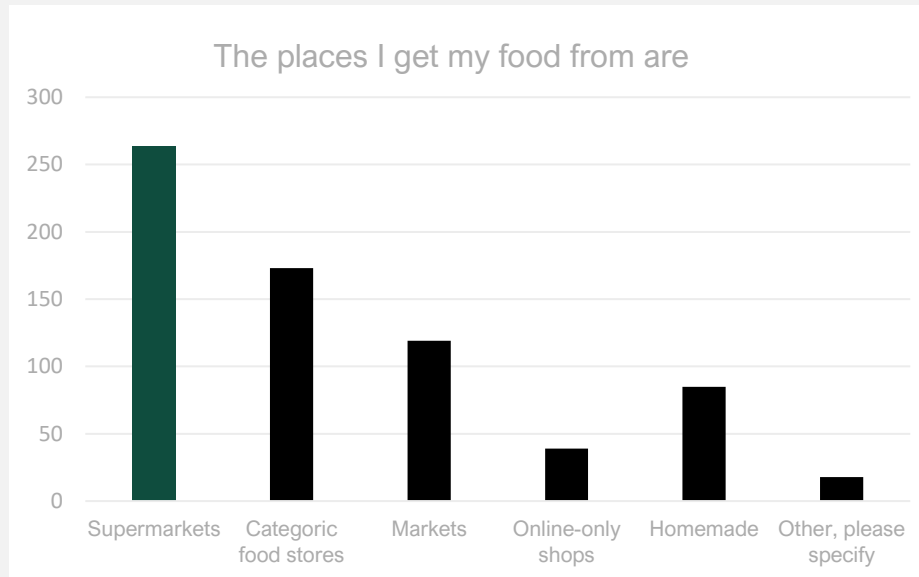
Online-only

Homemade

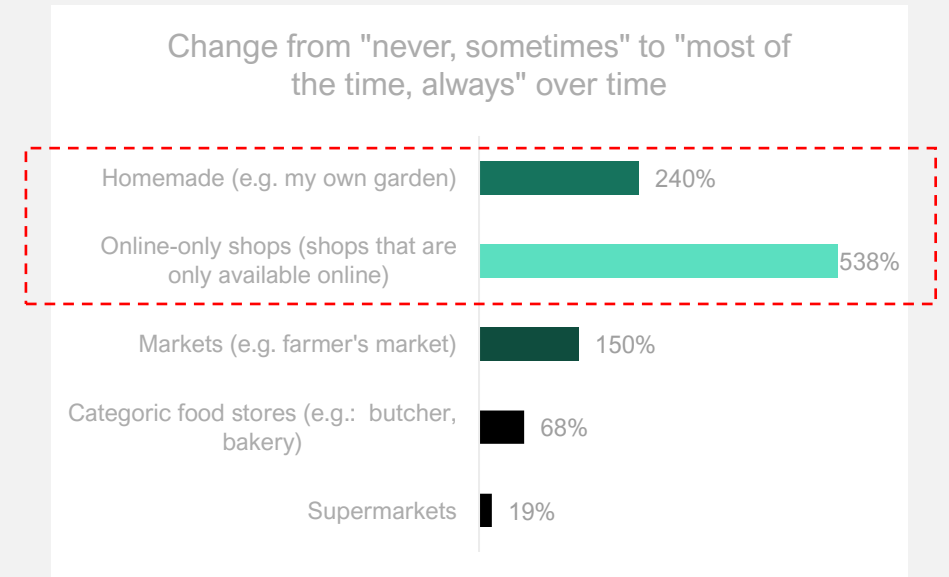
Seasonality

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%

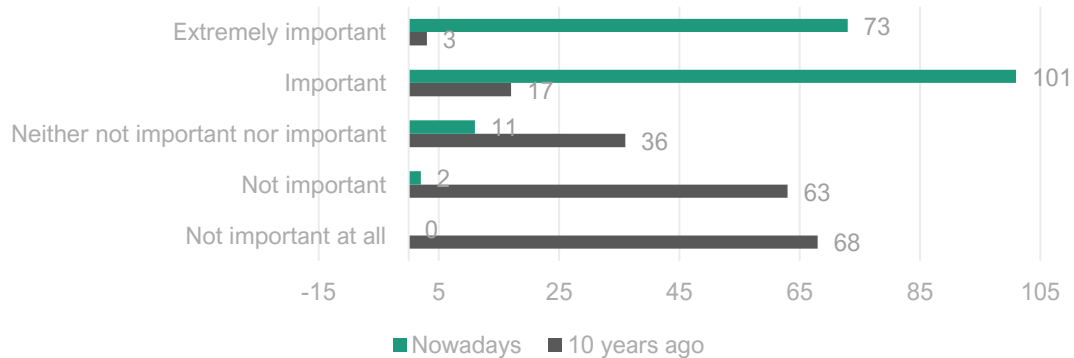
Of the respondents are **concerned** about packaging **nowadays**

82%

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

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

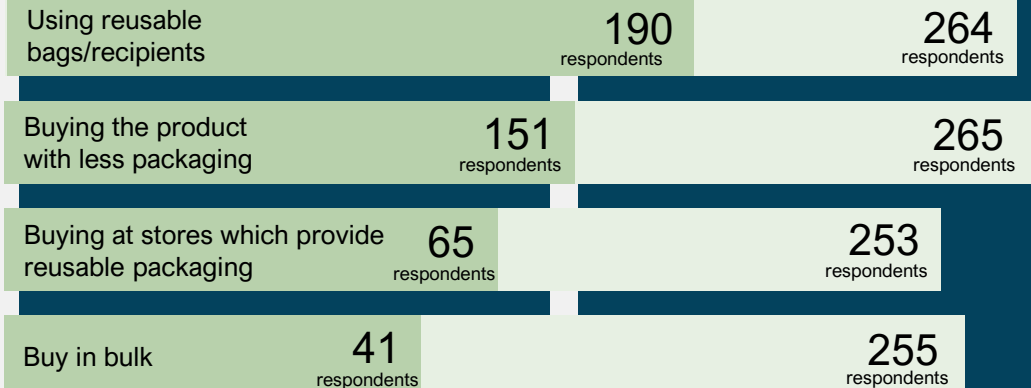
Respondent's change in bringing own reusable bags, food recipients from 10 years ago to nowadays



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

Number of respondents taking specific actions right now

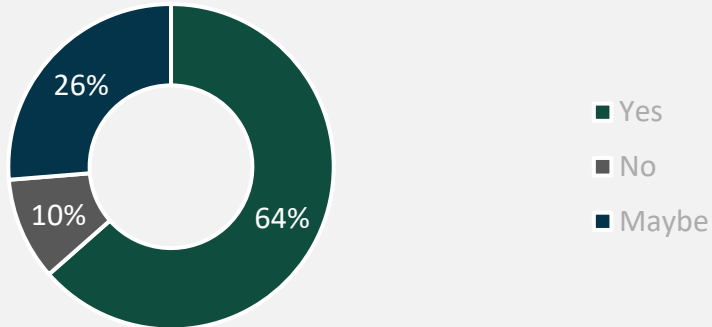
Number of respondents willing to take those actions in 5 years



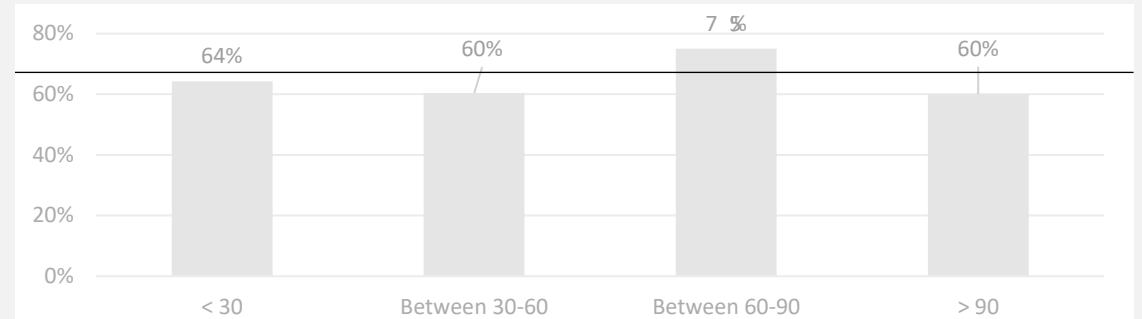
APPENDIX 4: PRODUCTION

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

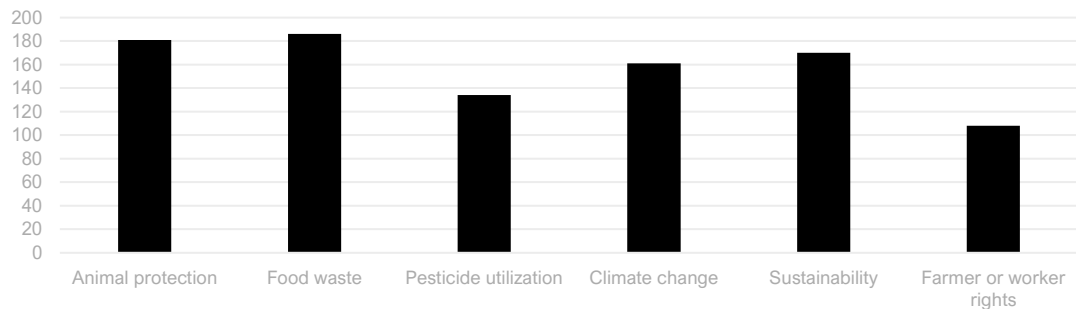
1. Majority of respondents is concerned about food production process



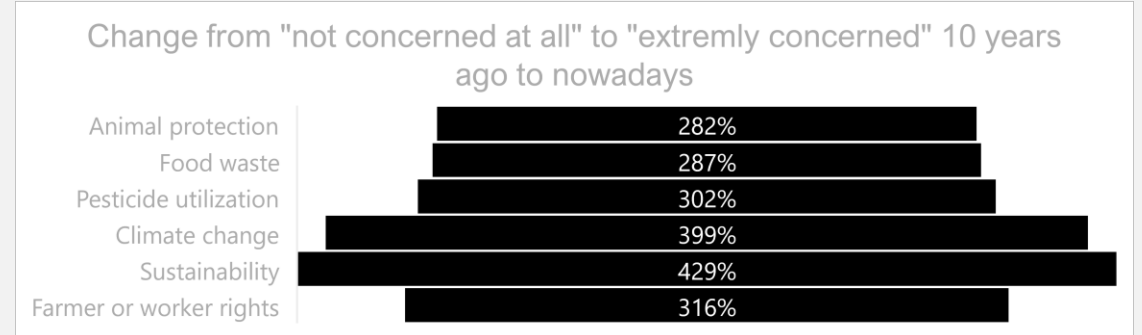
2. Proportion of people concerned about food production processes per **income** categories **does not show a link** between income level and concern



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?

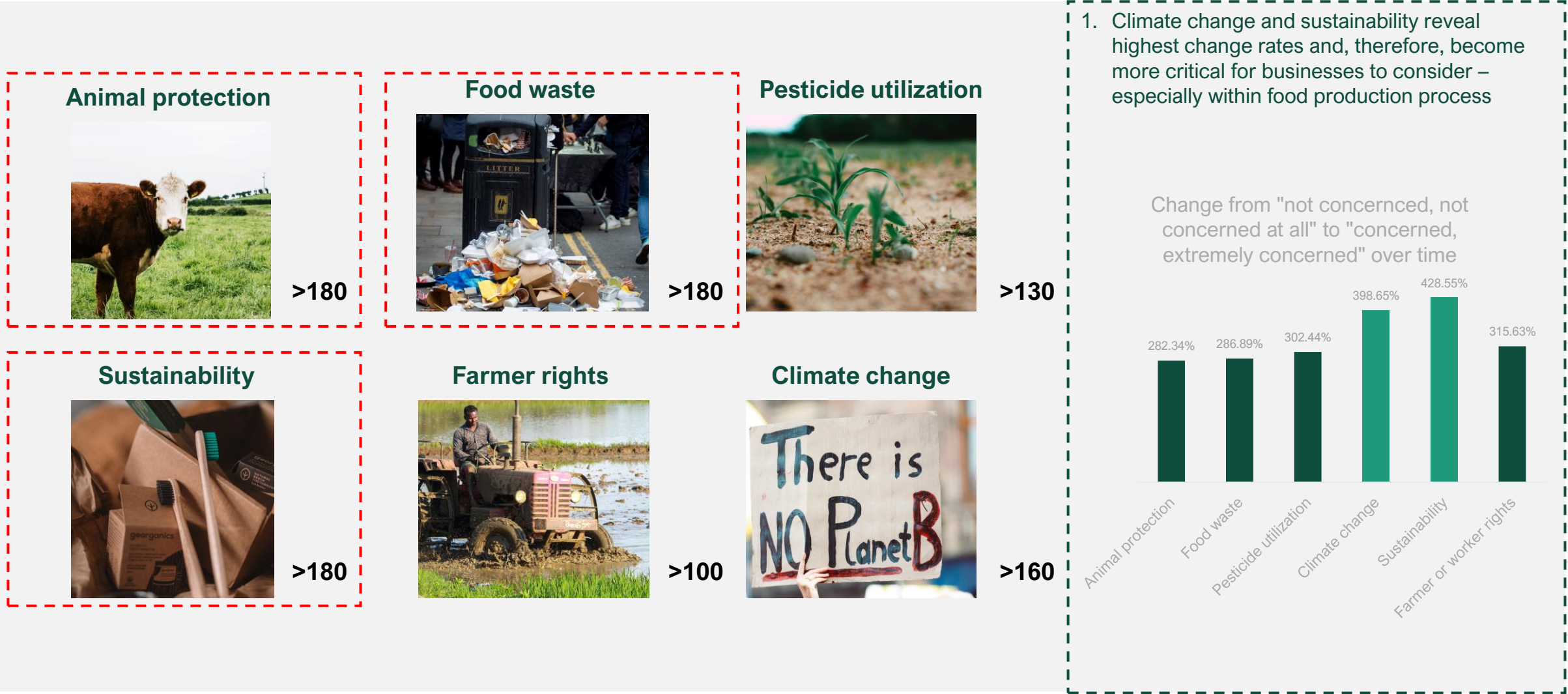
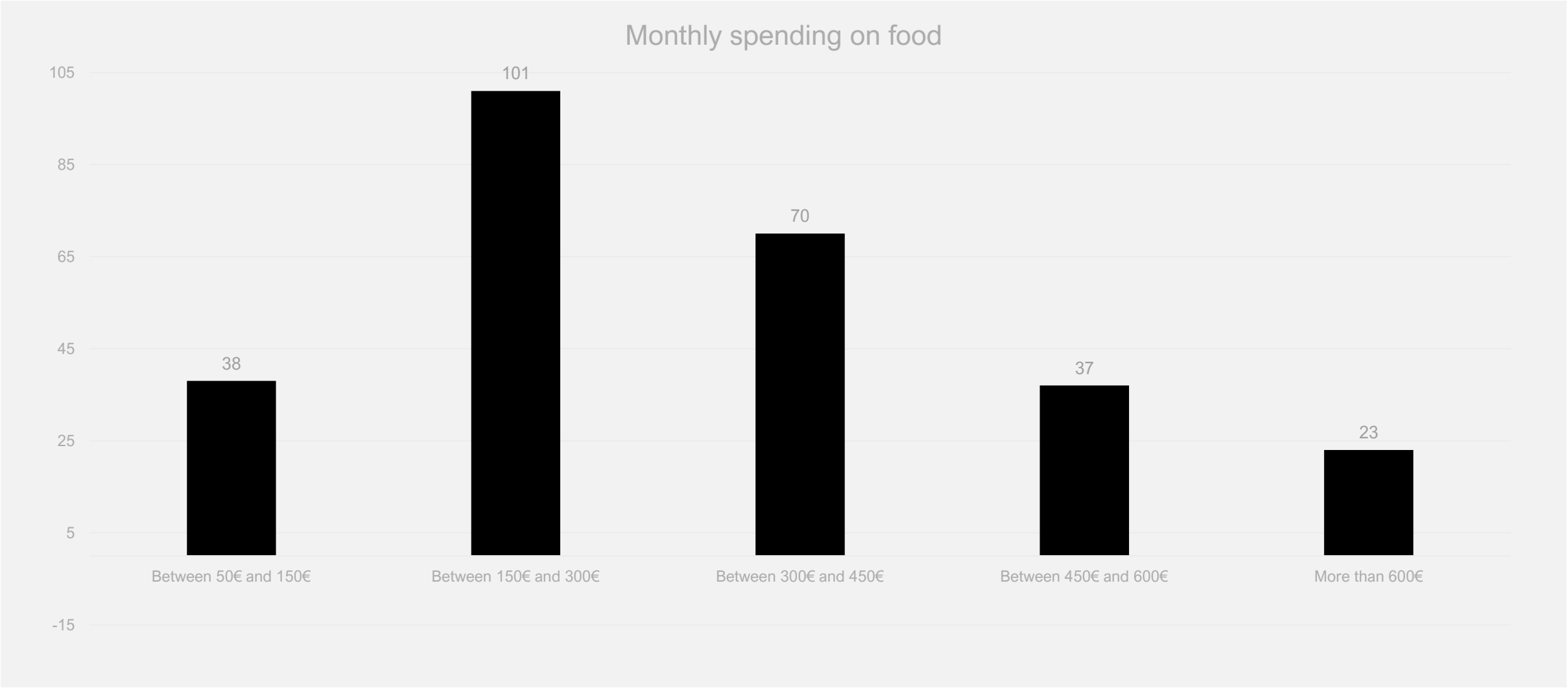
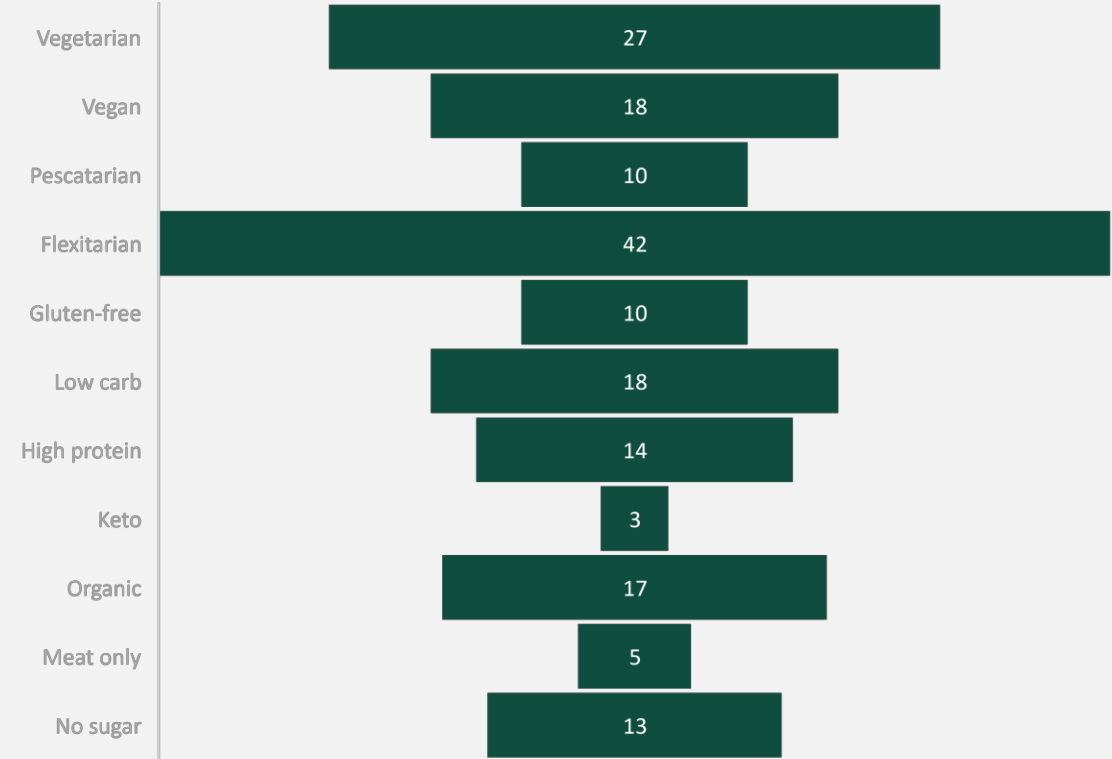


Photo by [Kyle Mackie](#) on [Unsplash](#); Photo by [Paul Schellekens](#) on [Unsplash](#); Photo by [Markus Spiske](#) on [Unsplash](#); Photo by [Markus Spiske](#) on [Unsplash](#); Photo by [Toa Heftiba](#) on [Unsplash](#); Photo by [Rajesh Ram](#) on [Unsplash](#)

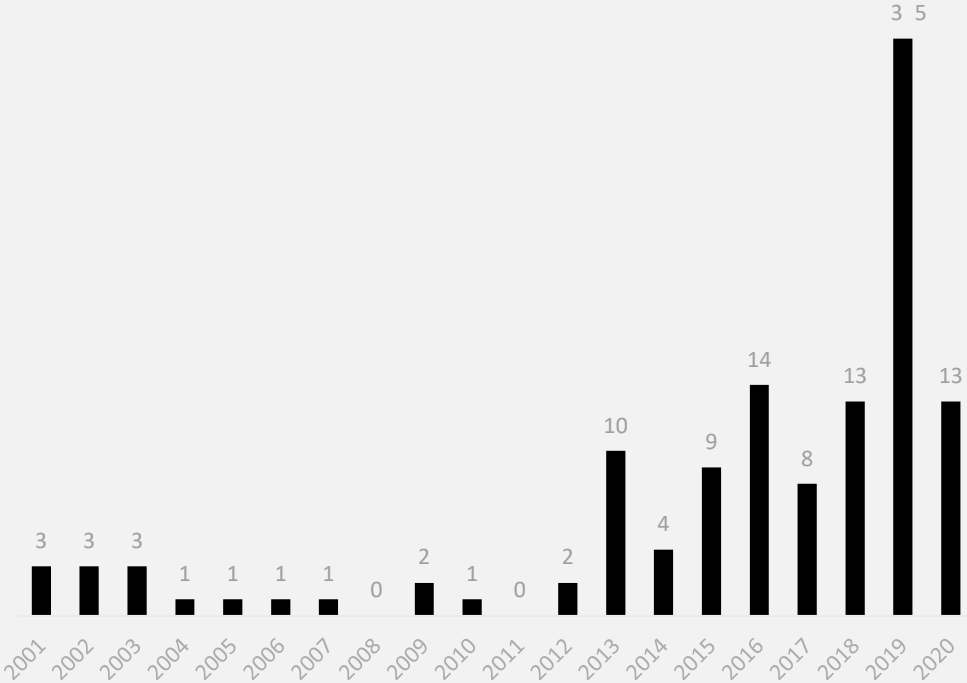




Respondents diet portfolio

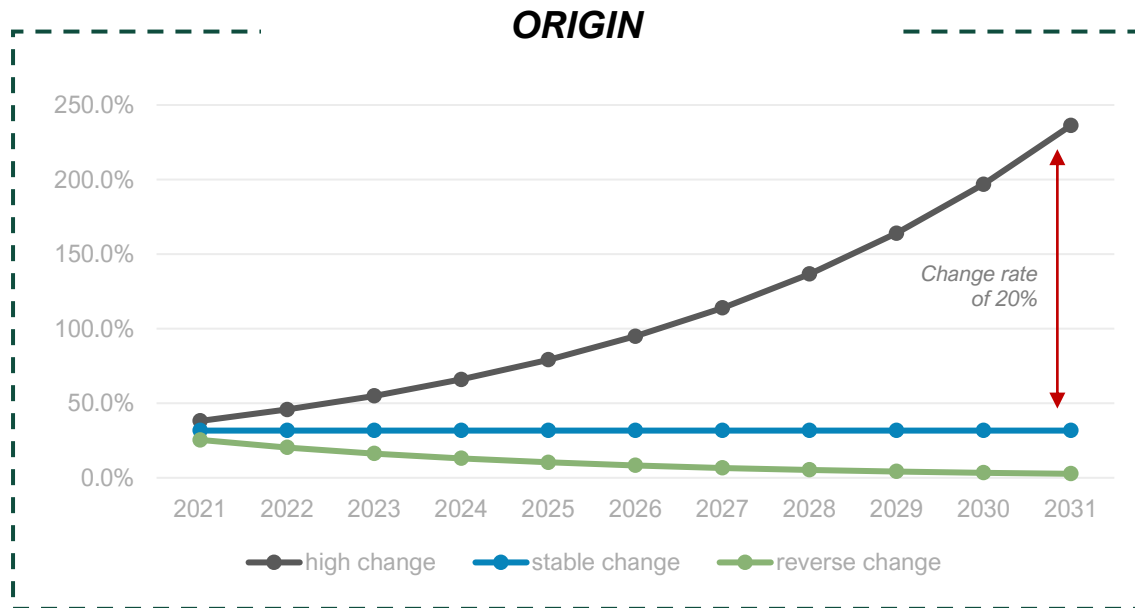


When did you change your food consumption for your current diet?



Focus category “product” displays major importance change trends

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

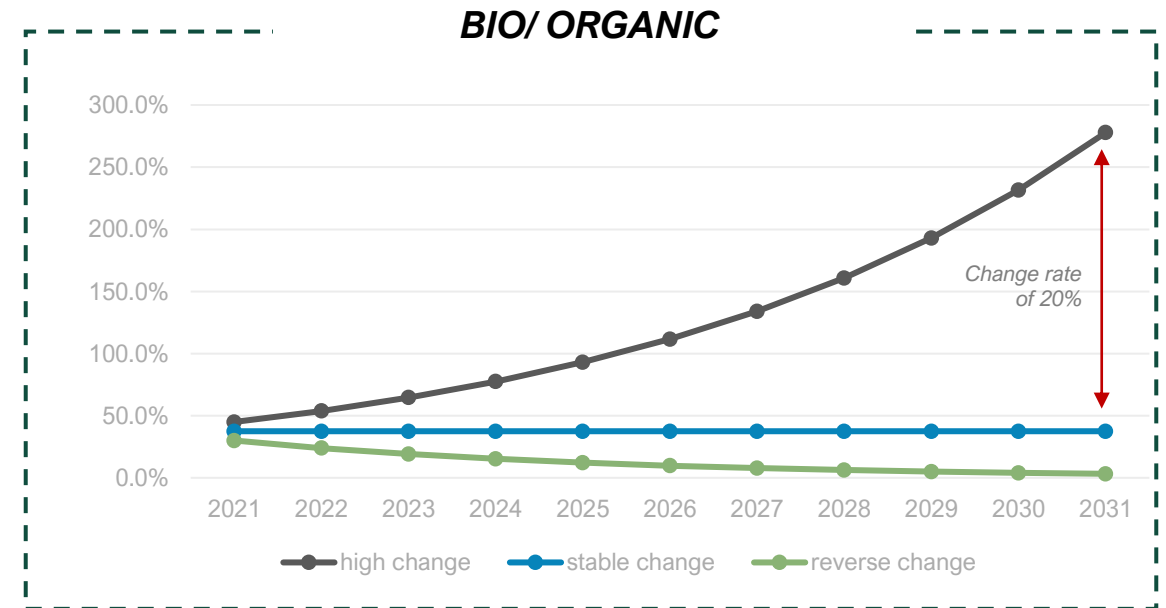


CURRENT AVERAGE IMPORTANCE CHANGE¹

31.8%

EXPECTED AVERAGE IMPORTANCE INCREASE²

236.3%



CURRENT AVERAGE IMPORTANCE CHANGE¹

37.4%

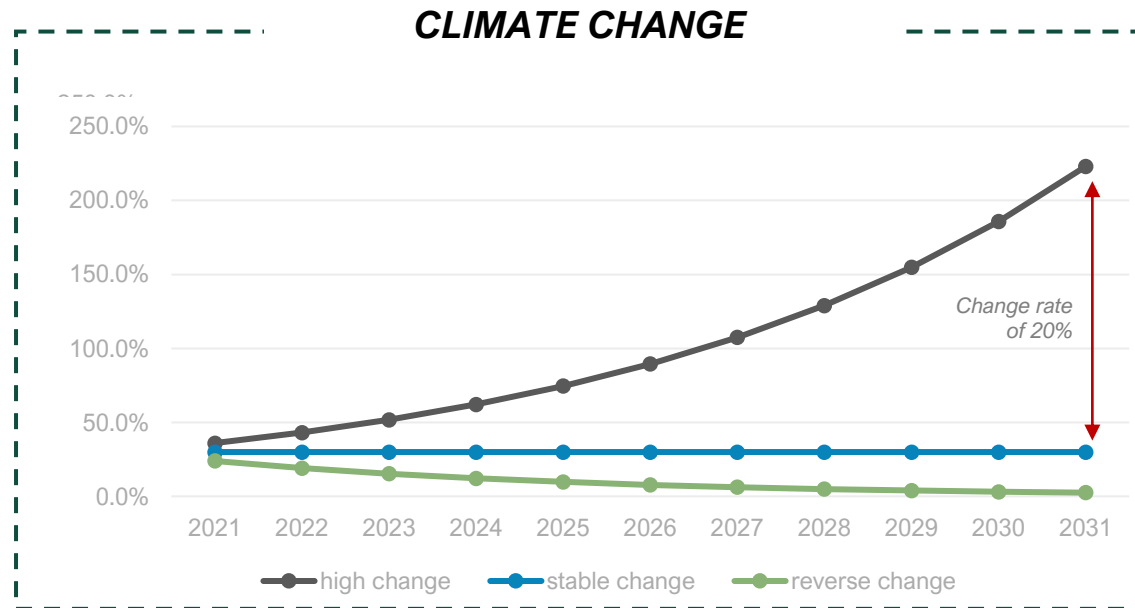
EXPECTED AVERAGE IMPORTANCE INCREASE²

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

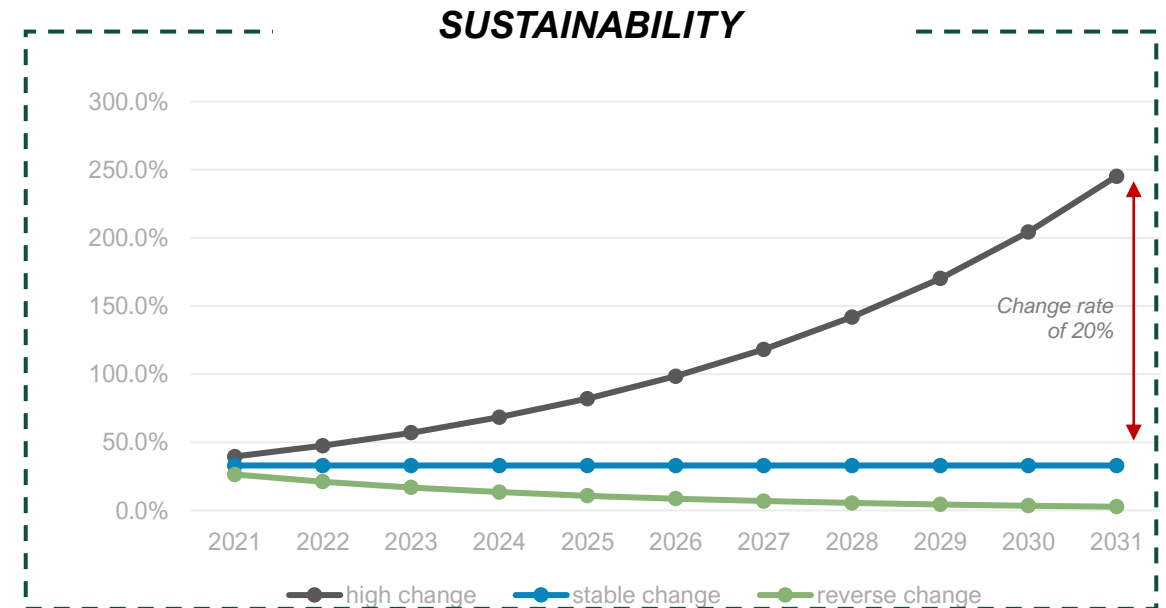


CURRENT AVERAGE IMPORTANCE CHANGE

30.0%

EXPECTED AVERAGE IMPORTANCE INCREASE

222.9%



CURRENT AVERAGE IMPORTANCE CHANGE

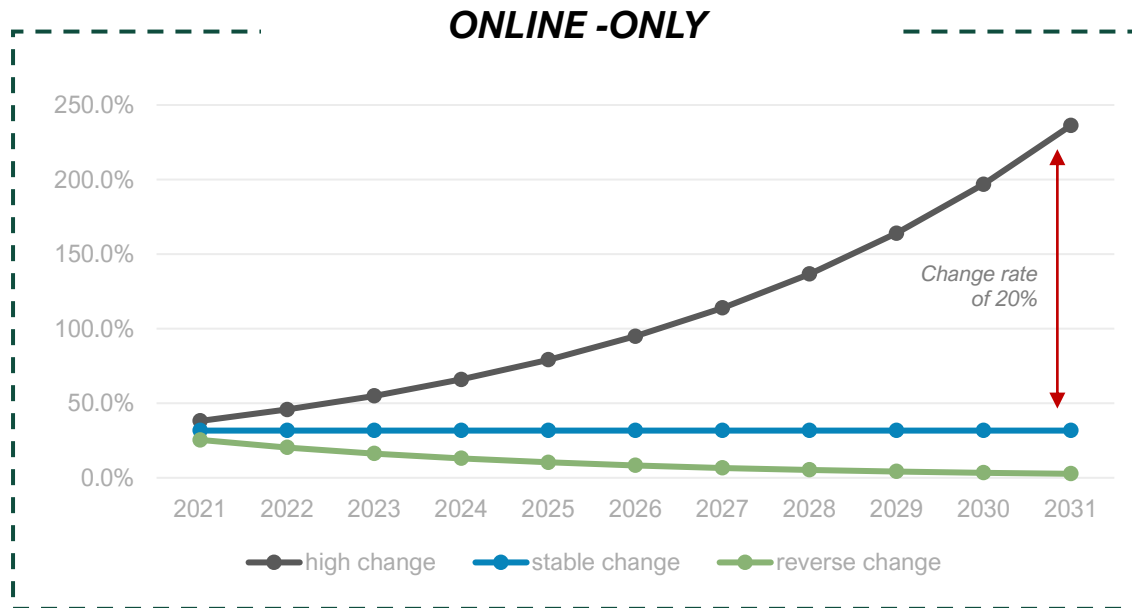
33.0%

EXPECTED AVERAGE IMPORTANCE INCREASE

245.2%

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

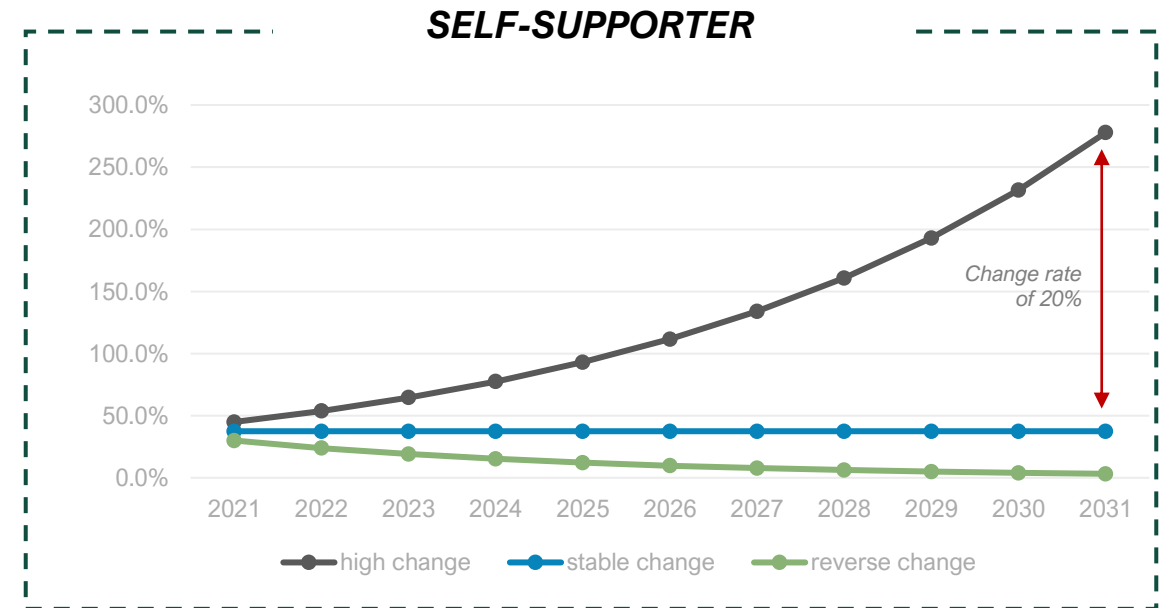


CURRENT AVERAGE IMPORTANCE CHANGE

50.0%

EXPECTED AVERAGE IMPORTANCE INCREASE

371.5%



CURRENT AVERAGE IMPORTANCE CHANGE

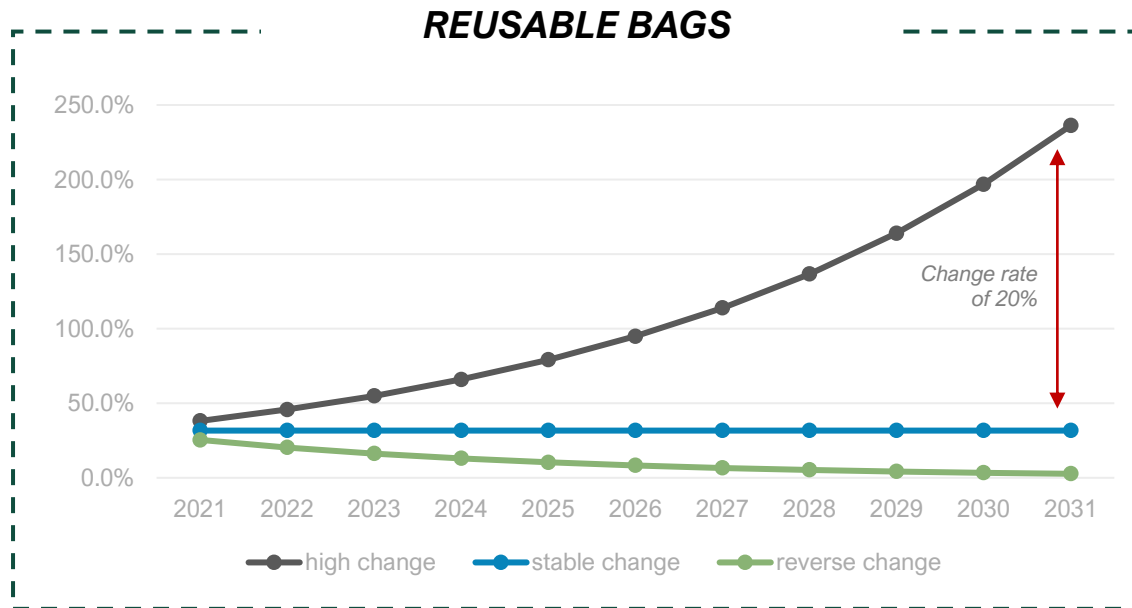
21.3%

EXPECTED AVERAGE IMPORTANCE INCREASE

158.3%

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

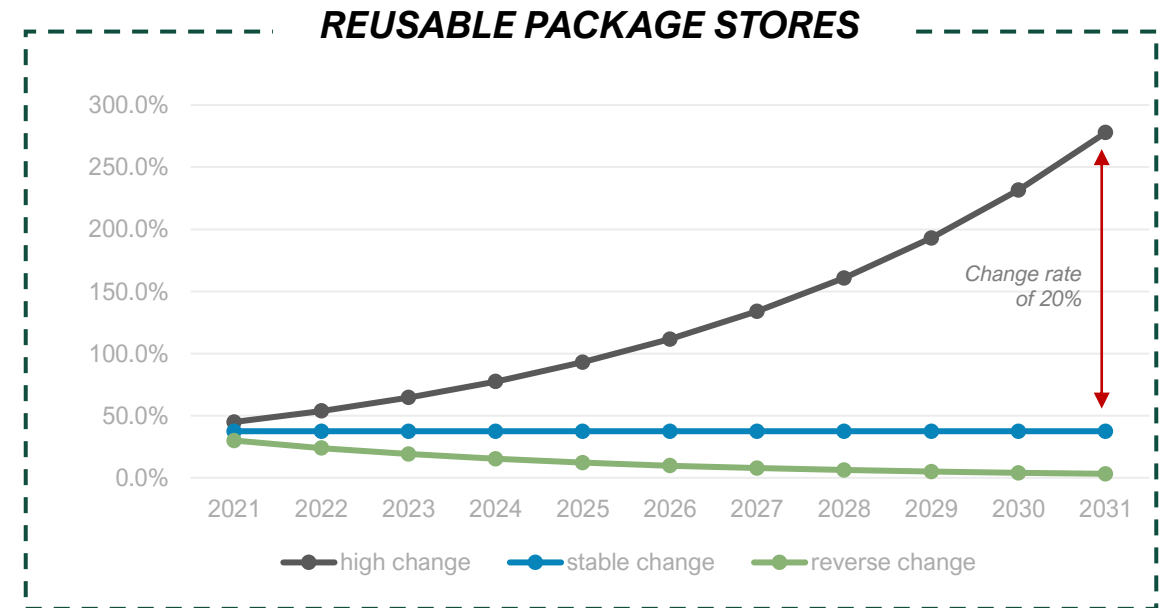


CURRENT AVERAGE IMPORTANCE CHANGE

77.0%

EXPECTED AVERAGE IMPORTANCE INCREASE

572.1%



CURRENT AVERAGE IMPORTANCE CHANGE

81.7%

EXPECTED AVERAGE IMPORTANCE INCREASE

607.0%



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

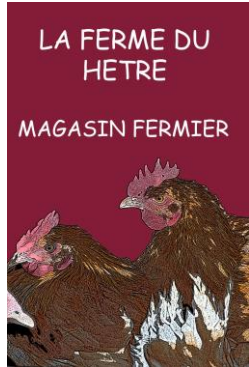
Interviewee

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



“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, black, serif font. The letters are lowercase, with a distinctive 'y' that has a long, curved tail. The logo is centered within a light yellow rectangular background.

“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



“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

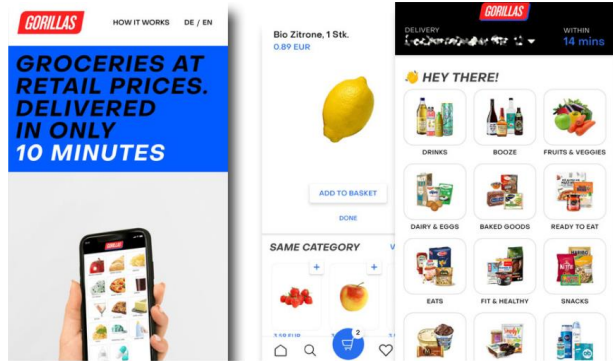
England

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



**“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

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