



## THE CHANGING ROLE OF WHEAT IN OUR WORLD

7<sup>TH</sup> NOVEMBER 2013 – 24<sup>TH</sup> ANNUAL IAOM MIDEAST &  
AFRICA CONFERENCE & EXPO

BY LAMINE LAHOUSNIA – HEAD OF PACKAGED FOOD RESEARCH

# About Euromonitor International

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# The war for wheat continues

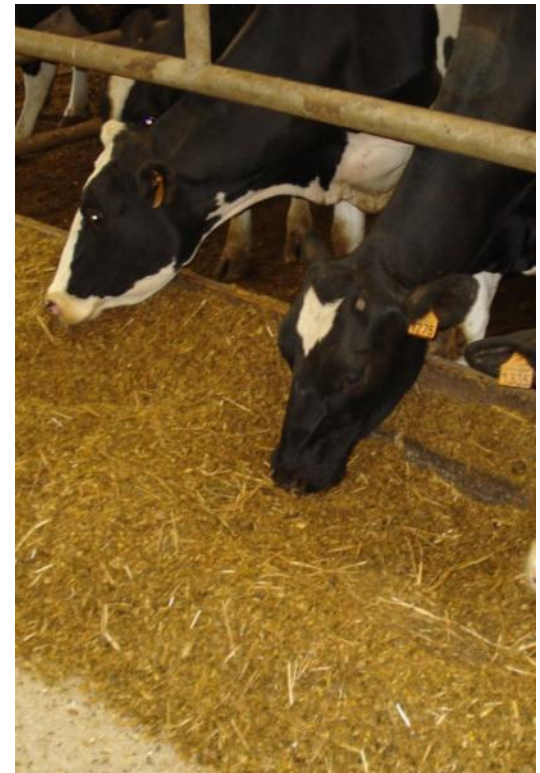
Food

VS

Fuel

VS

Feed



# **STILL OUR DAILY BREAD?**

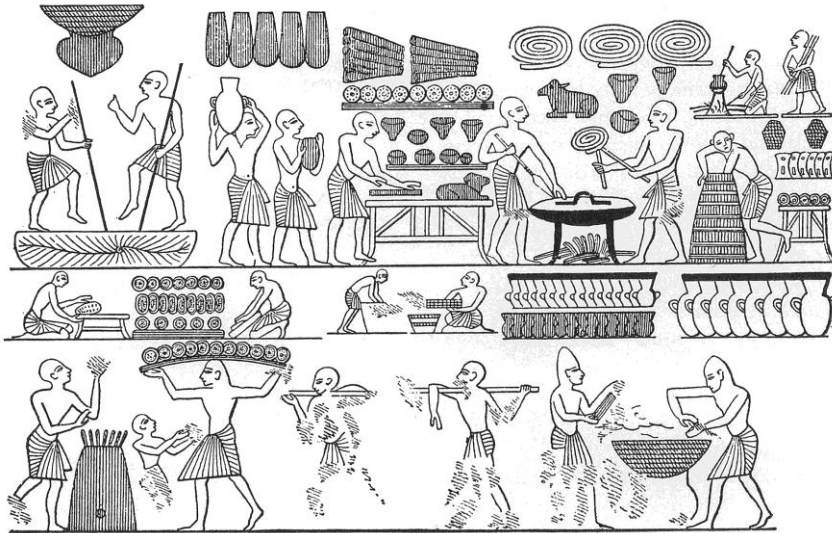
BAKING BREAD 2.0

OTHER OPPORTUNITIES FOR WHEAT



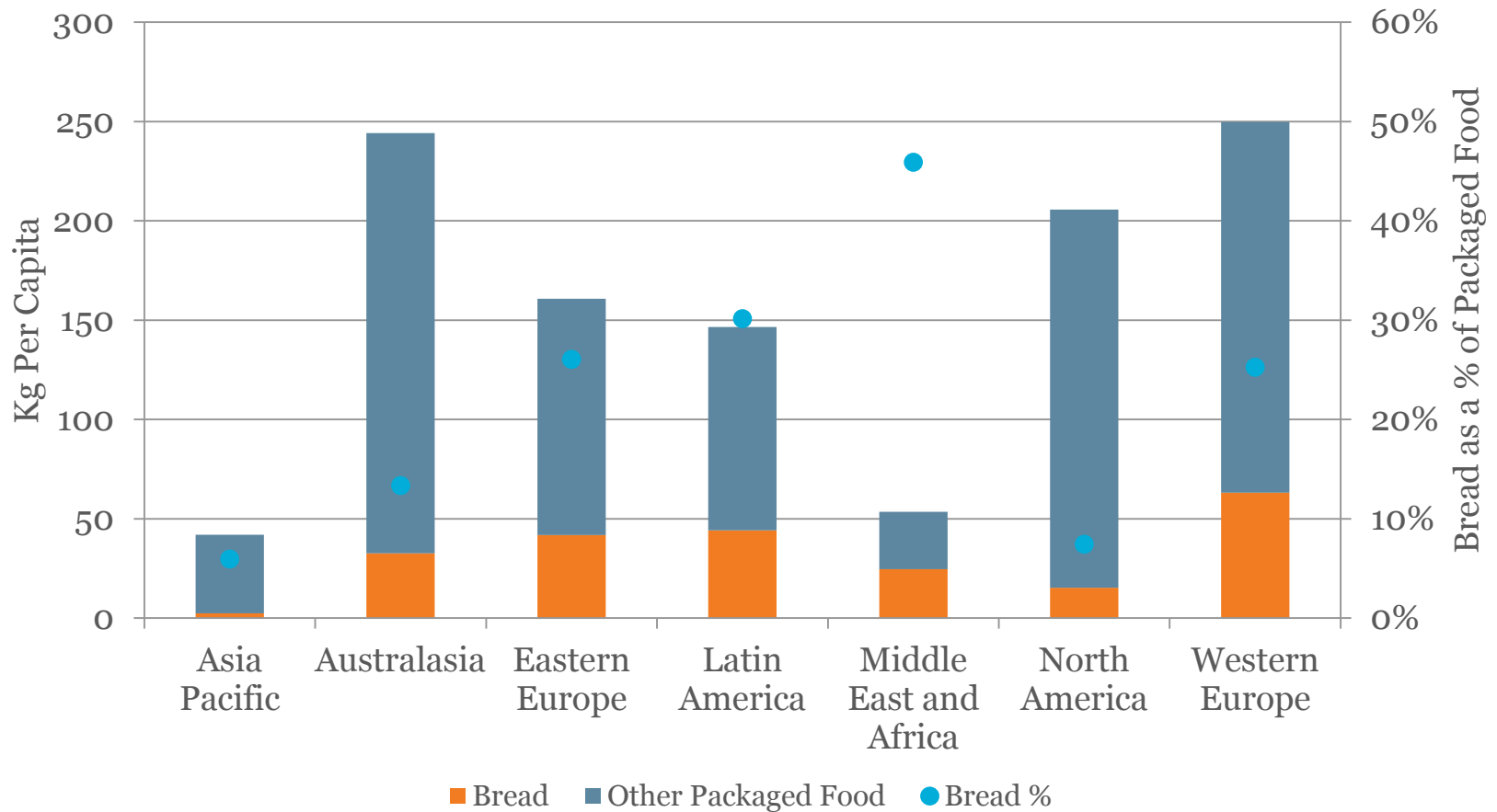


# Bread has always been important to our lives...



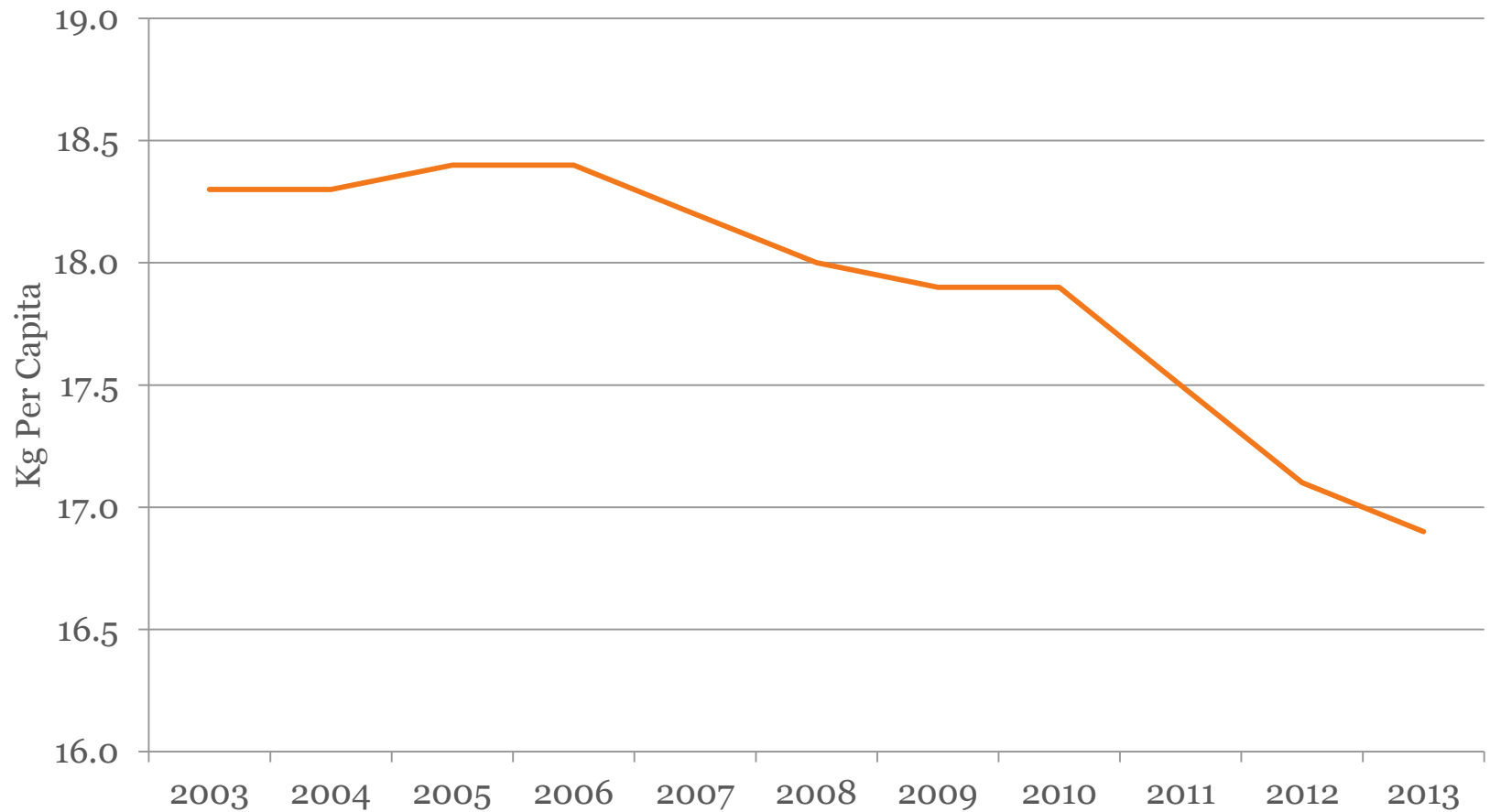
...and its importance varies significantly...

### Regional Retail Consumption of Bread, 2013



...but why is it on the decline?

## World: Retail Consumption of Bread



## Today's reality: Our diets have shifted away from staples

Farmers, fisherman, builders  
Large families  
Cheap and filling  
Stew or a soup



Lawyers, accountants, designers  
Small families  
Tasty and healthy  
Salad or a snack

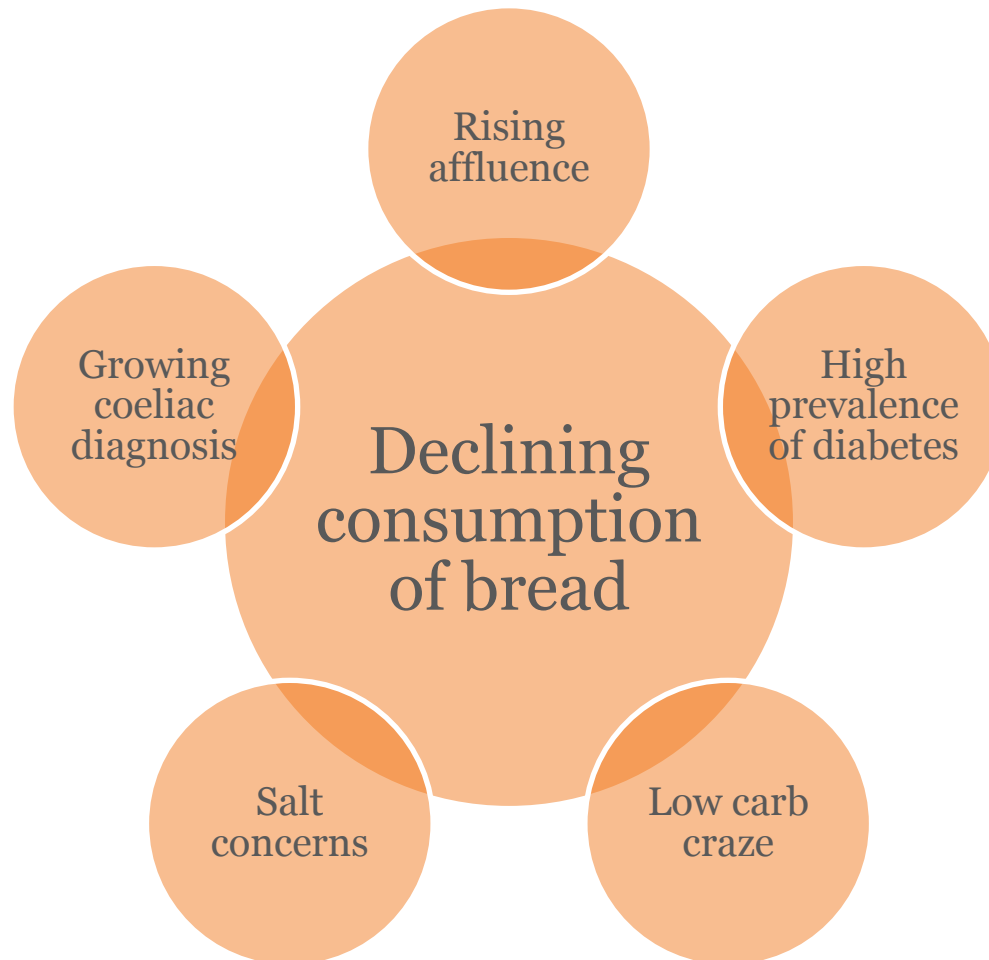


Yesterday

Today



## The core reasons behind the decline of bread



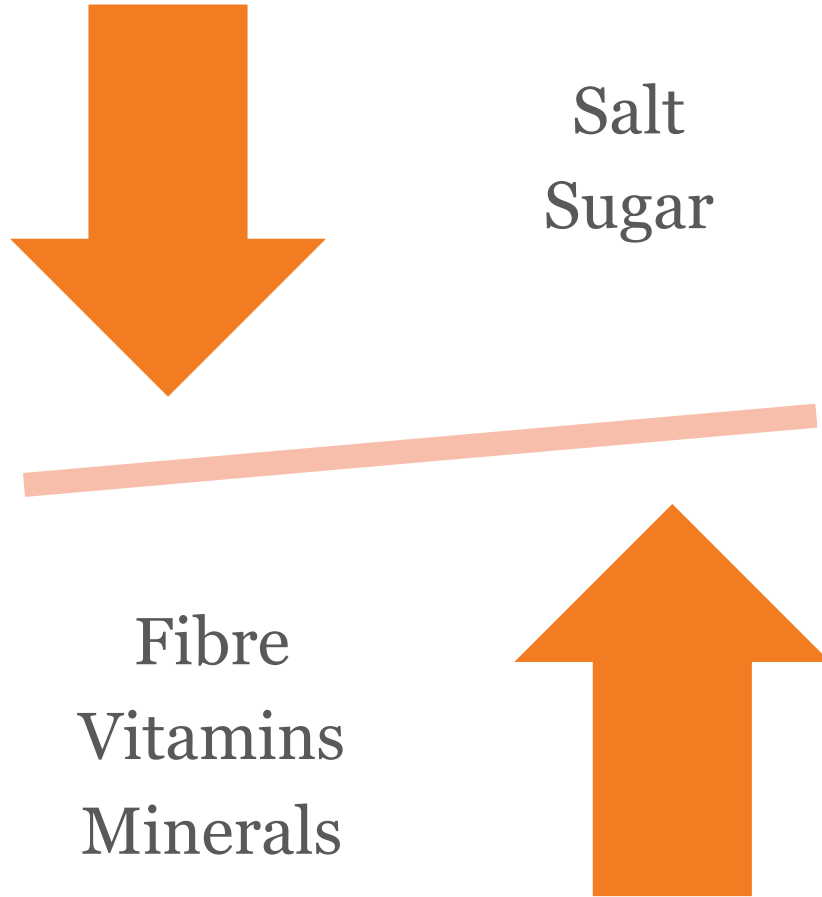
STILL OUR DAILY BREAD?

**BAKING BREAD 2.0**

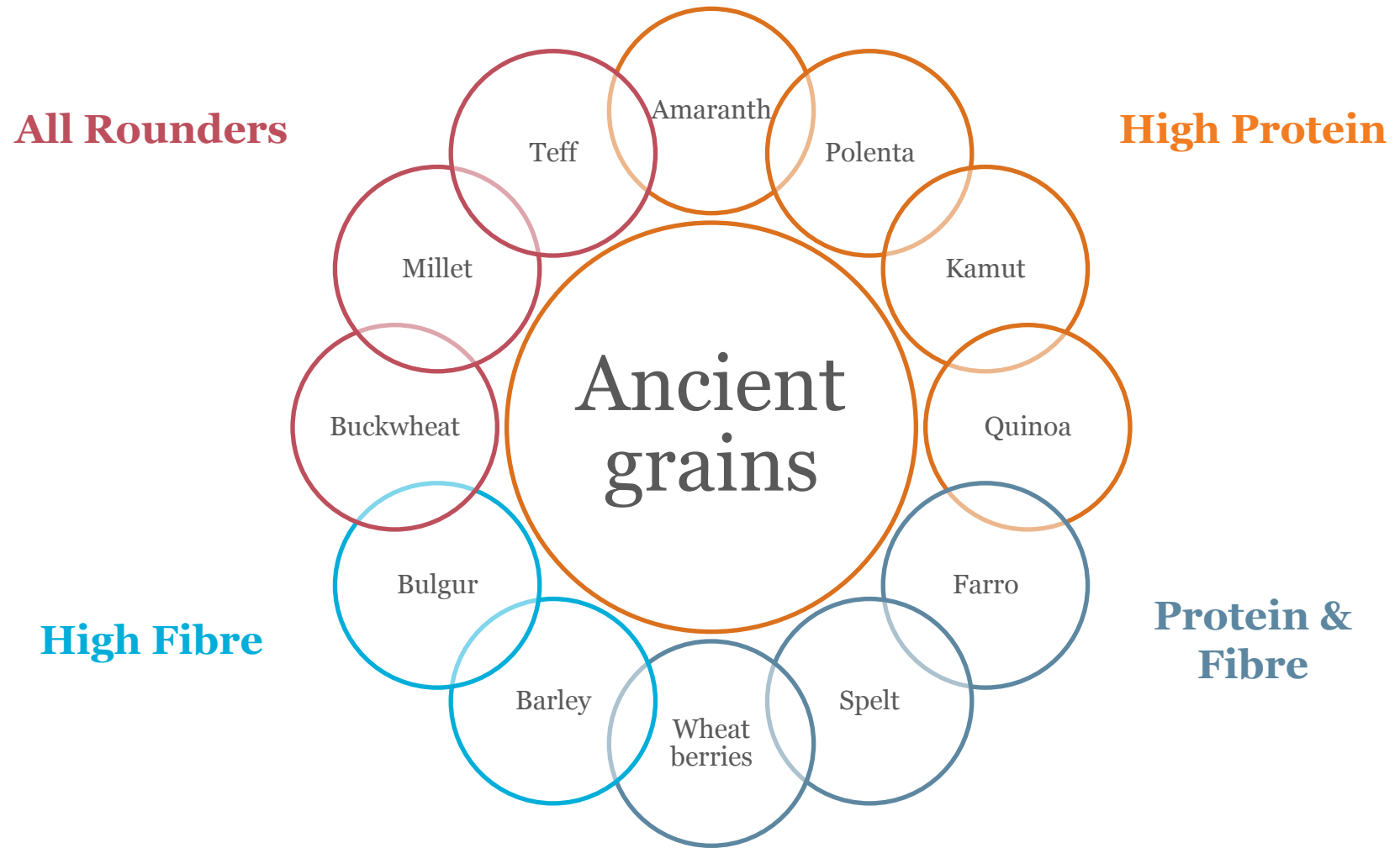
OTHER OPPORTUNITIES FOR WHEAT



# Reformulating for success

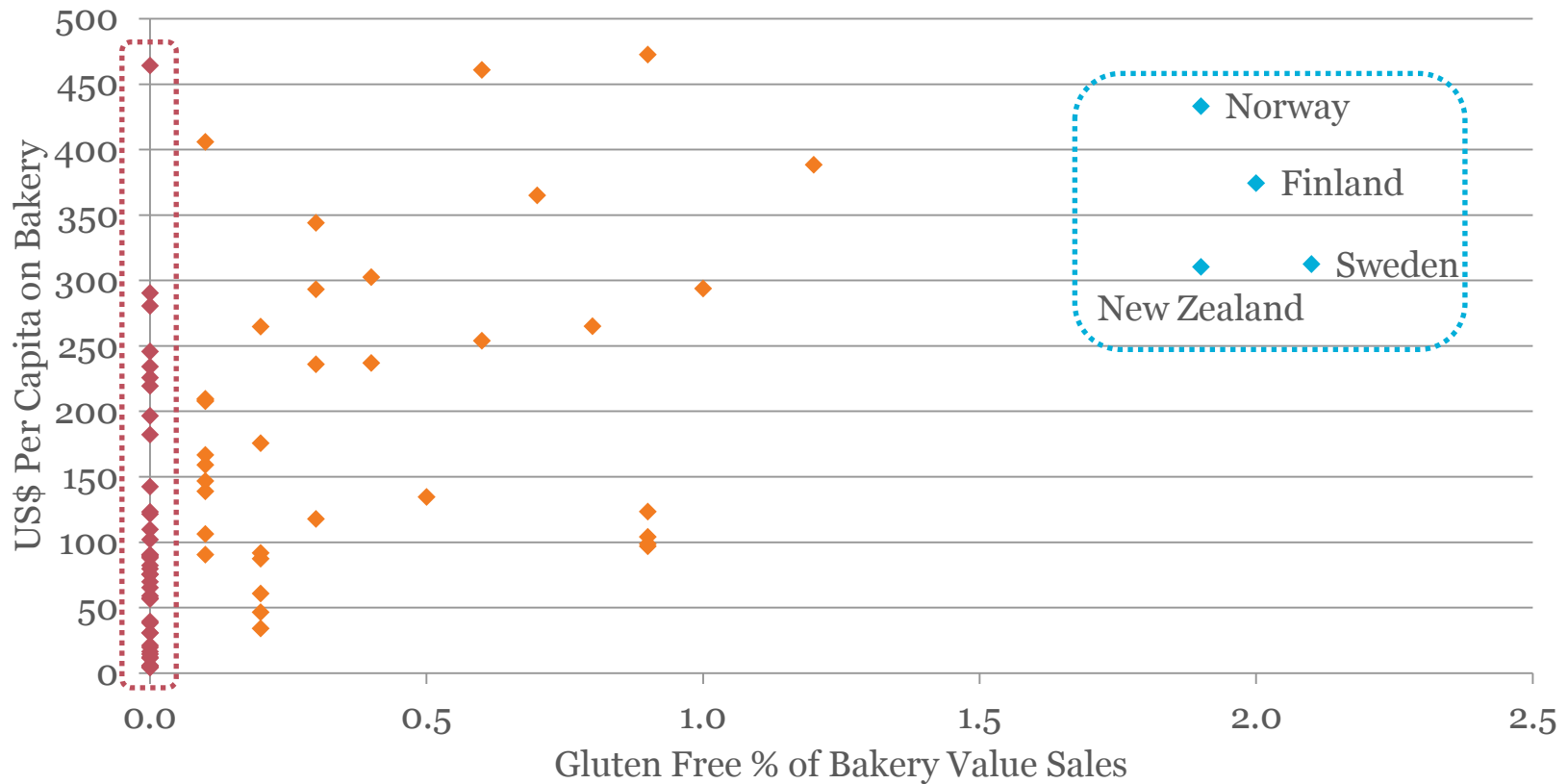


## Appealing to the diet fanatics: Introducing the supergrains



# Let them have their bread and eat it too: Gluten free

## 80 Markets: Identifying the Largest Gluten Free Markets, 2013





STILL OUR DAILY BREAD?

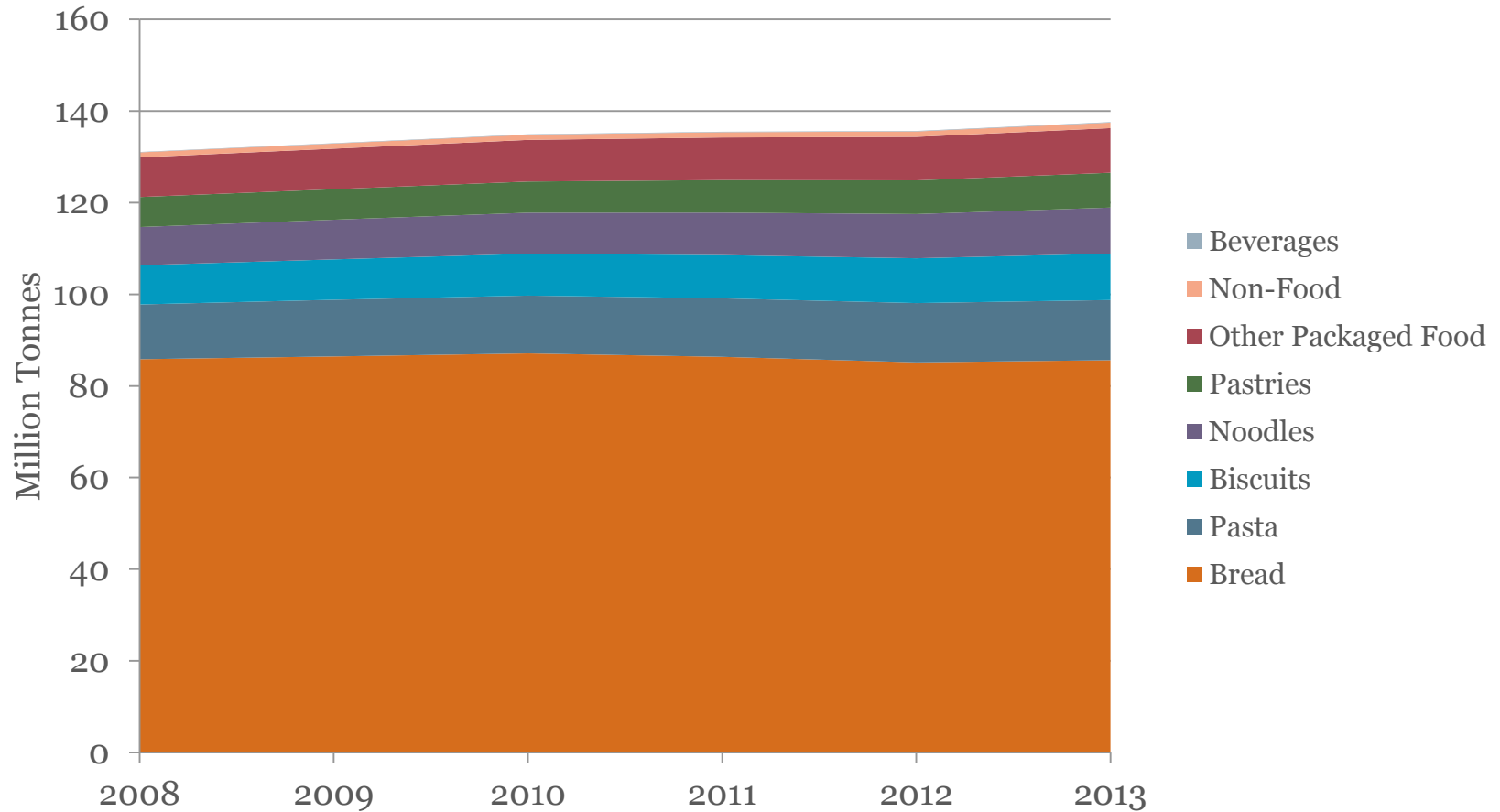
BAKING BREAD 2.0

**OTHER OPPORTUNITIES FOR WHEAT**



The decline of bread has been offset primarily by...

### World: Retail Consumption of Flour by Product



OTHER OPPORTUNITIES FOR WHEAT

Noodles are spreading outside of traditional East Asian markets



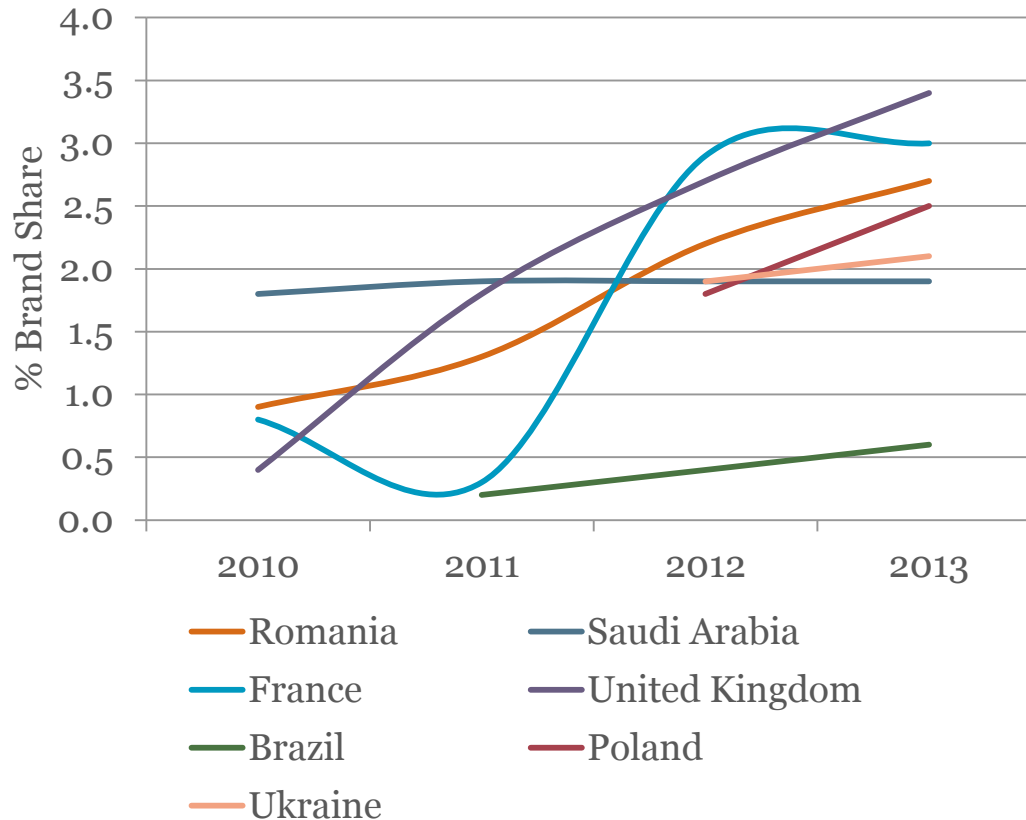
7.3 Kg  
OF INSTANT NOODLES  
PER HEAD IN S. KOREA

\$4.4  
PRICE PER KG OF  
INSTANT NOODLES

Youth  
PREFER CHEAP, QUICK  
AND FLEXIBLE FOOD

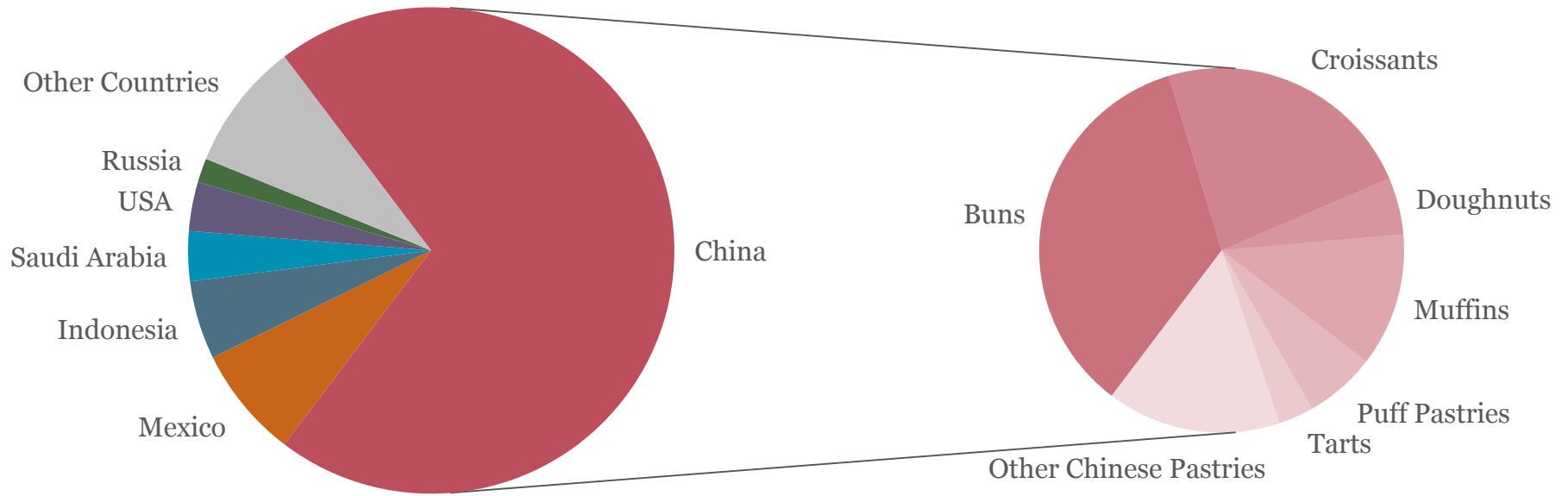
# Biscuits becoming a bona fide breakfast alternative

## Selected Markets: Belvita's Performance in Sweet Biscuits



## Pastries prove perfect for on the go consumption

**Demand for Pastry Flour over 2013-2015**



478m

TONNES MORE FLOUR  
TO BE USED BY 2015

Clash

OF FOREIGN PASTRIES  
AND CHINESE FLAVOUR

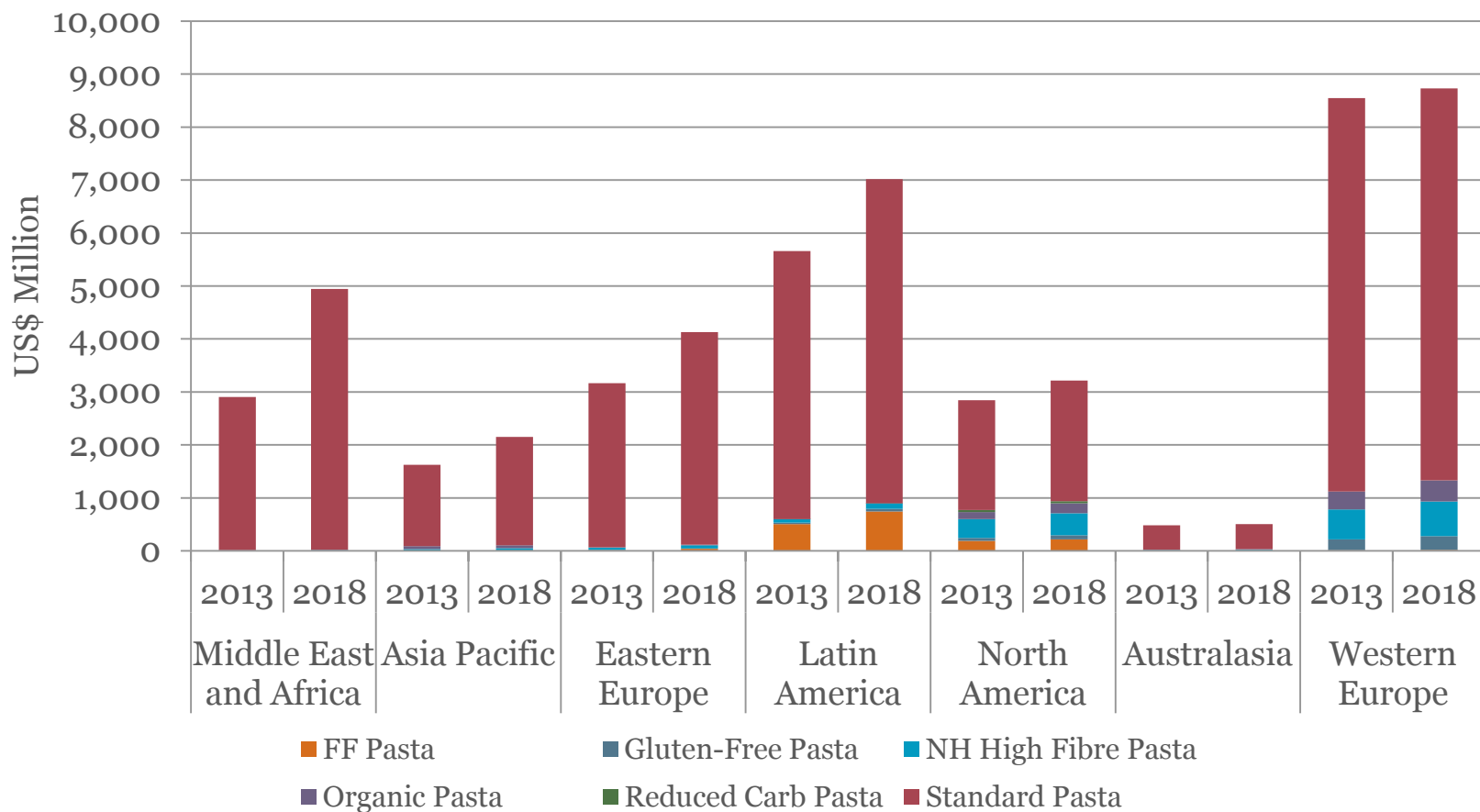
Lighter

PASTRIES ARE  
PREFERRED IN CHINA

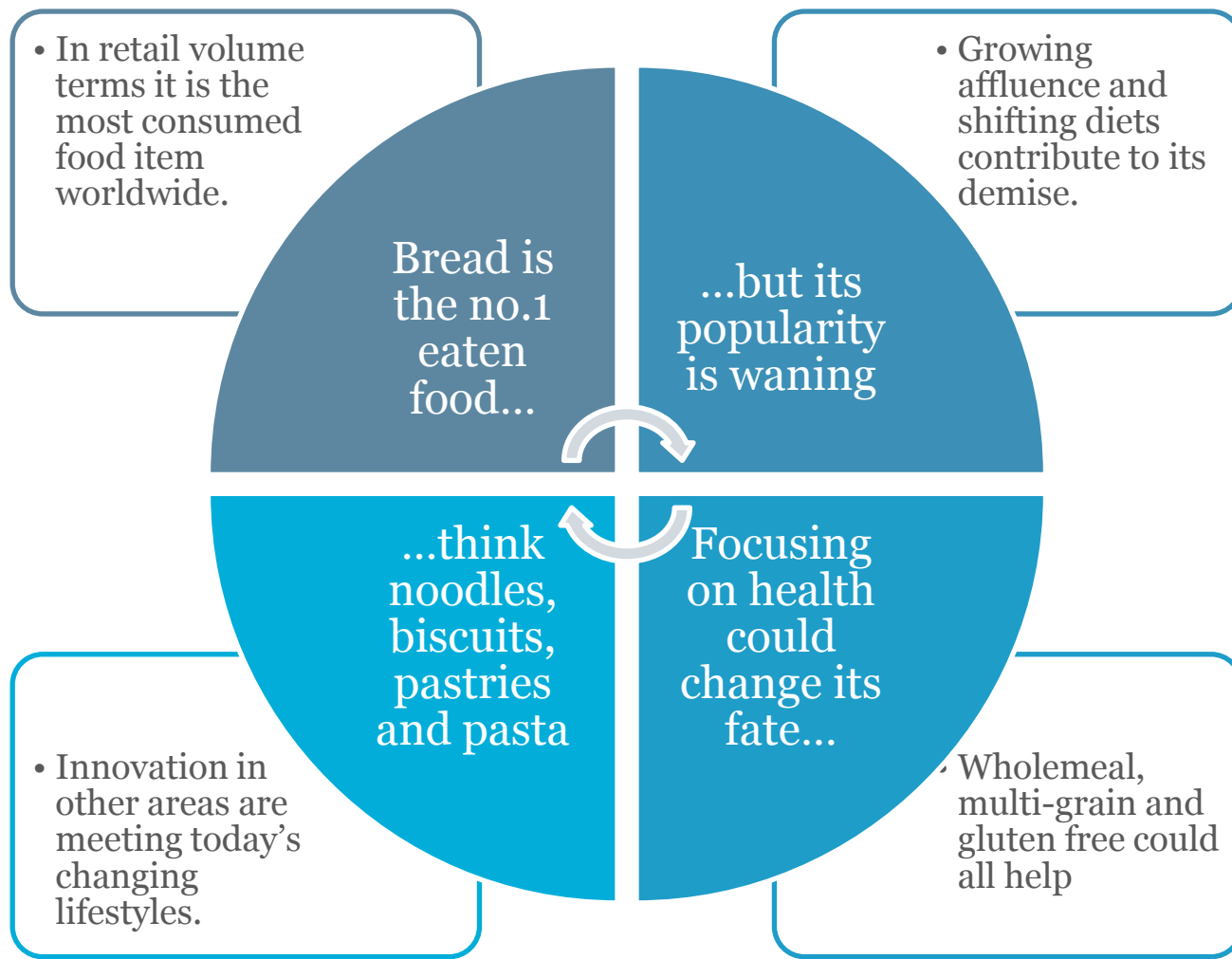


# Growth opportunities for pasta differ greatly across the world

## Pasta by Health Positioning Across the World



## A few things for you all to remember





## THANK YOU FOR LISTENING

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