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FUTURE FOOD 2023

UAE FOOD & BEVERAGE BUSINESS GROUP
Inspiring Sustainable Wellbeing

The Future of Food

ADAPTING TO CHANGING CONSUMER BEHAVIOR

Toluna is a **Knowledge Partner for the 2023 Edition of Future Food Forum.** This report contains research data and insights gathered in September 2023 and was produced especially for the session "The Future of Food: Adapting to Changing Consumer Behaviour".

RESEARCH OBJECTIVES

- ✓ Chalk out emerging trends in the food and beverages sector owing to growing conscious consumerism.
- ✓ Assess the demand for plant-based, free from foods, organic and clean label products in the Middle East.
- ✓ Identify ways to help brands engage effectively with their consumers in these uncertain times.

METHODOLOGY

Quantitative online surveys among Toluna panellists.

FIELDWORK DATES…

Benchmark wave: 2022	27 – 29 September 2022
Current wave: 2023	8 – 12 September 2023

SAMPLE SIZE

	2022	2023
UAE	550 Interviews	385 Interviews
KSA	452 Interviews	467 Interviews

TARGET AUDIENCE

- Males & Females
- Aged 18-45 years or above
- Key decision makers of household grocery shopping

1

Understanding the Lifestyle & Dietary Regime of Middle Easterners

2

Uncovering the Trends in the Plant-based Universe

3

Exploring the Dynamics of of 'Free From Food' in the Middle East

4

Dissecting the Demand of Clean Label & Organic products

5

How can brands connect better with consumers & gain territory?

6

Key Learnings for brands

Understanding the

LIFESTYLE & DIETARY REGIME

OF MIDDLE EASTERNERS

72% | 75%

…have been on a diet or food re-education

Three-fourths of Middle Easterners have consulted nutritionists for advice on healthy eating regime.

'Losing weight' and 'improving quality of life' emerged as the leading factors.

MOTIVATORS

	UAE	KSA
LOSING WEIGHT	61%	59%
IMPROVING QUALITY OF LIFE	54%	54%
IMPROVING SELF-ESTEEM	33%	27%
HEALTH PROBLEMS	33%	27%
GAINING MUSCLE MASS/DEFINITION	29%	29%
PUTTING ON WEIGHT	27%	27%

Base: All Respondents

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Q. Have you ever been on a diet/regime or food re-education? | Q. Please indicate for each of the nutritional/dietary regime below, whether you are following them now? | Q. For which reasons are you on a nutritional follow-up?

Intermittent fasting, cutting sugar intake and consuming low amount of carbs continue to be the top 3 trendy diets in the Middle East.

 

	2022	2023	2022	2023
Intermittent fasting	51%	54%	58%	59%
Cutting sugar, candies	50%	48%	46%	42%
Low-carb	45%	46%	37%	37%
Ketogenic	36%	38%	33%	31%
Vegan/Plant-based	39%	32%	27%	20%
Cutting gluten	25%	25%	18%	15%
Point system/counting calories	30%	24%	38%	32%
Cutting lactose/diary	21%	17%	13%	15%
Atkins – high protein diet	--	17%	--	16%
Metabolic	17%	12%	12%	8%
Mediterranean	17%	11%	10%	9%
DNA Diet	14%	8%	12%	12%
Dukan	10%	4%	6%	5%

Base: All Respondents

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Q. Of all types of diets and eating re-education that you know, which ones would you say that are trendy now?

And ~4 in 10 Middle Easterners have already tried these leading trendy diets.

	2022	2023	2022	2023
Intermittent fasting	47%	51%	57%	54%
Cutting sugar, candies	51%	48%	43%	42%
Low-carb	40%	43%	37%	37%
Ketogenic	24%	21%	21%	20%
Vegan/Plant-based	26%	21%	20%	11%
Cutting gluten	21%	21%	12%	11%
Point system/counting calories	27%	18%	32%	29%
Cutting lactose/diary	19%	19%	10%	11%
Atkins – high protein diet	--	15%	--	12%
Metabolic	17%	10%	12%	9%
Mediterranean	16%	10%	10%	9%
DNA Diet	15%	8%	12%	11%
Dukan	11%	5%	8%	7%

Base: All Respondents

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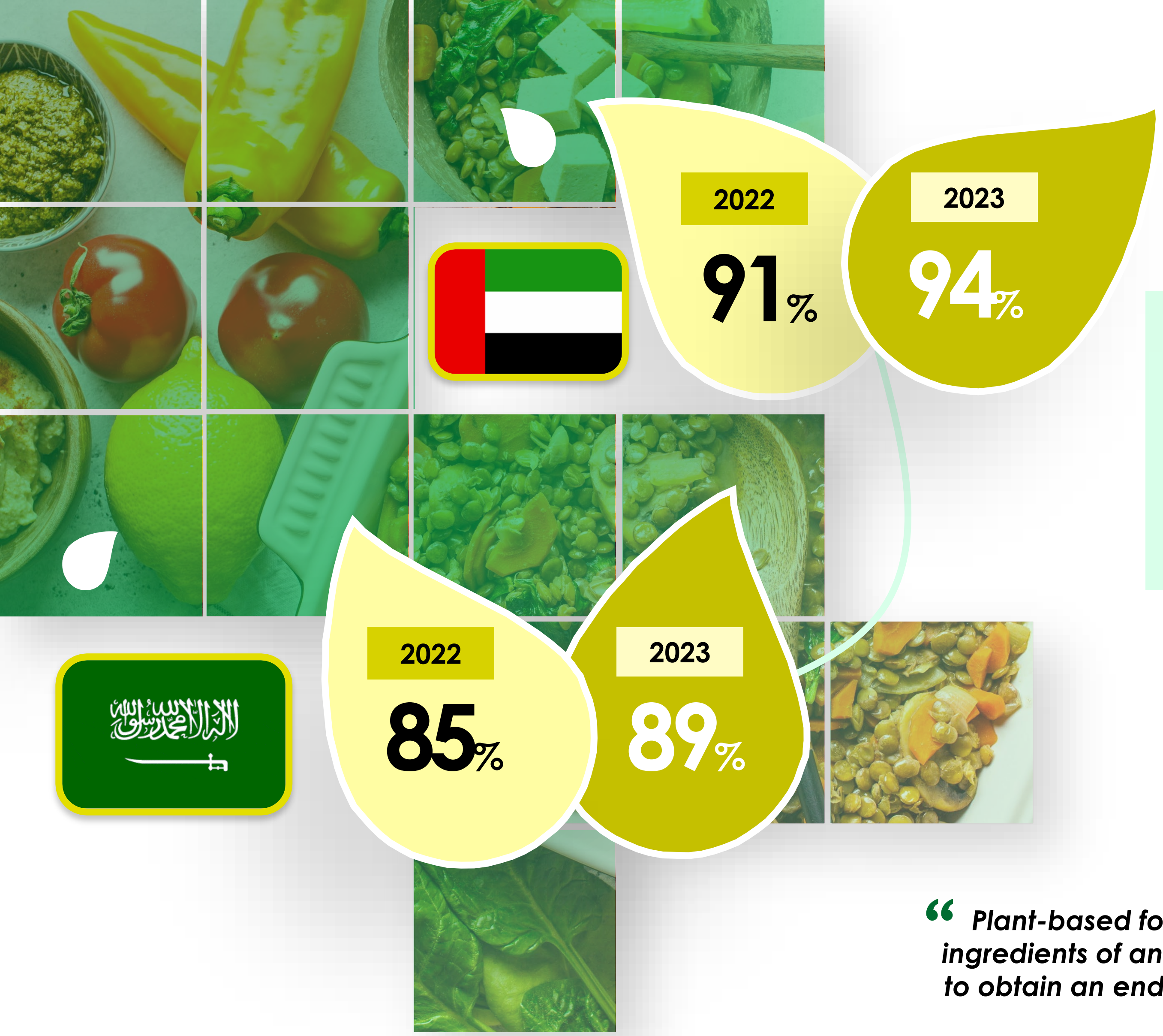
Q. And which ones of the followings have you ever tried?

UNCOVERING THE TRENDS

IN THE PLANT-BASED UNIVERSE



Rising Awareness
of plant-based products

Definition of Plant-based products used in the study

“Plant-based food and beverages are produced using plant ingredients only, with no ingredients of animal origin. By using innovative equipment and techniques, it is possible to obtain an end product with flavor and texture very similar to conventional products of animal-origin and that imitates animal-origin products.”

Base: All Respondents

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Q. Now, I would like to ask you again if you know/have ever heard of plant-based food and beverages.

HIGHER AWARENESS HAS RESULTED IN GREATER TRIAL OF PLANT BASED PRODUCTS

	Non-Aware of Plant-based Food & Beverage		Aware but Non Trialist of Plant-based Food & Beverage		Trialists of Plant-based Food & Beverage	
	2022	2023	2022	2023	2022	2023
UAE	9%	6%	4%	6%	87%	88%
KSA	15%	11%	4%	4%	81%	86% ▲

Base: All Respondents

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Q. Now, I would like to ask you again if you know/have ever heard of plant-based food and beverages? |
Q. How often do you consume the following types of food currently?

▲▼ Indicates significantly higher/lower vs. 2022 at 95% CI

ARE

PLANT-BASED

consumers mostly

vegans,

vegetarians?

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Among those who have tried plant-based products,

	2022	2023
	55%	74% ▲
	58%	69% ▲

ARE CARNIVORES!

	2022	2023	2022	2023
VEGETARIANS	22%	12%	16%	13%
PESCITARIANS	15%	8%	14%	12%
VEGANS	8%	6%	12%	6%

Base: Trialists

Q. Which ONE of these options describes your current eating regime?

▲▼ Indicates significantly higher/lower vs. 2022 at 95% CI

	2022	2023
UAE	38%	▲ 47%
KSA	30%	25%

... CLAIMED TO BE
FLEXITARIANS

Base: Trialists

In order to...

	UAE	KSA
STAY HEALTHY	72%	86%
SAVE THE ENVIRONMENT	36%	40%

Q. Which ONE of these statements describes you the best? |
Q. Why are you a flexitarian?

▲▼ Indicates significantly higher/lower vs. 2022 at 95% CI

Those consuming plant-based food & beverages 'multiple times a week' has **plunged** vs. 2022 – indicating **partial reversal** to old eating habits.

Plant-based FOOD

	2022	2023
At least 3 times a week	46%	32% ▼
Once a week	26%	31%

Plant-based BEVERAGE

	2022	2023
At least 3 times a week	30%	21% ▼
Once a week	27%	28%

Base: Trialists

toluna Q. How often do you consume the following types of food currently?

▲▼ Indicates significantly higher/lower vs. 2022 at 95% CI

In UAE, a noticeable segment of those who were initially enthusiastic about replacing their current food with plant-based products ended up consuming them in addition to their current diet.

Plant-based Food

	2022	2023
As a replacement for the food that you consume currently	67%	44% ▼
In addition to the food that you consume currently	33%	56% ▲

Plant-based Beverages

	2022	2023
As a replacement for the food that you consume currently	38%	38%
In addition to the food that you consume currently	62%	62%

Base: Trialists

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Q. How would you classify your consumption of the below:

▲▼ Indicates significantly higher/lower vs. 2022 at 95% CI

Similarly in Saudi, the **consumption trend** of plant-based food & beverages ‘multiple times a week’ is **facing downward**.

Plant-based FOOD

	2022	2023
At least 3 times a week	45%	36% ▼
Once a week	30%	28%

Plant-based BEVERAGE

	2022	2023
At least 3 times a week	30%	18% ▼
Once a week	32%	30%

Base: Trialists

toluna Q. How often do you consume the following types of food currently?

▲▼ Indicates significantly higher/lower vs. 2022 at 95% CI

And a significant proportion of the trialists who intended to replace their current food with plant-based products nosedived vs. 2022.

	Plant-based Food 2022	Plant-based Food 2023	Plant-based Beverages 2022	Plant-based Beverages 2023
As a replacement for the food that you consume currently	75%	42% ▼	33%	36%
In addition to the food that you consume currently	25%	58% ▲	67%	64%

Base: Trialists

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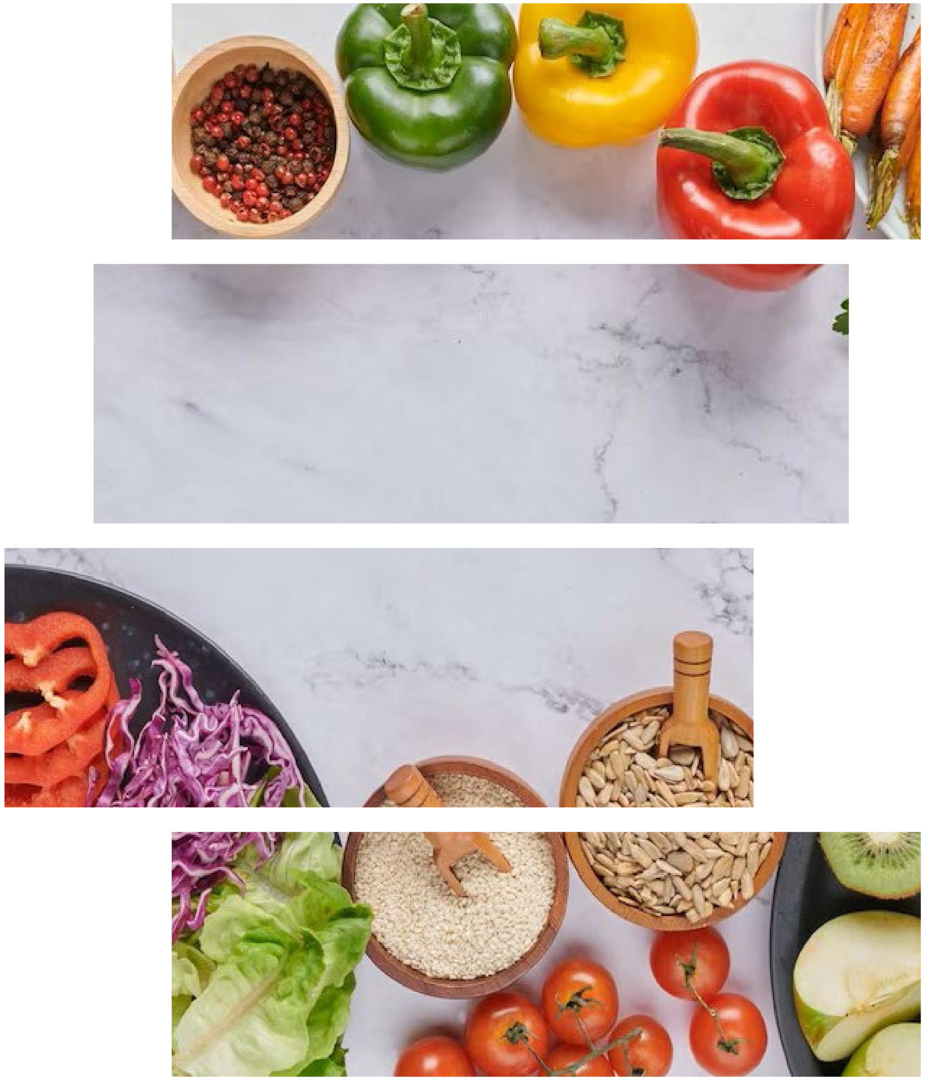
Q. How would you classify your consumption of the below:

▲▼ Indicates significantly higher/lower vs. 2022 at 95% CI

What is the

PRICE PERCEPTION

of plant-based products?



About **one-third** of the plant-based trialists find it **much more expensive** than regular food.

Compared to regular food,
plant-based food is considered to be…

Much More Expensive	35%	32%
Slightly More Expensive	33%	33%
Close/Equal	21%	23%
Cheaper	7%	6%
Don't pay attention	4%	6%

Base: Trialists

Q. Purchasing regular food and plant-based food, you would say that:

Exploring the Dynamics of

FREE FROM FOOD

IN THE MIDDLE EAST

~40% of those keen on 'adopting Free From Food' lifestyle are **health enthusiasts**, whereas **only ~10%** of them have some **intolerances/allergies.**

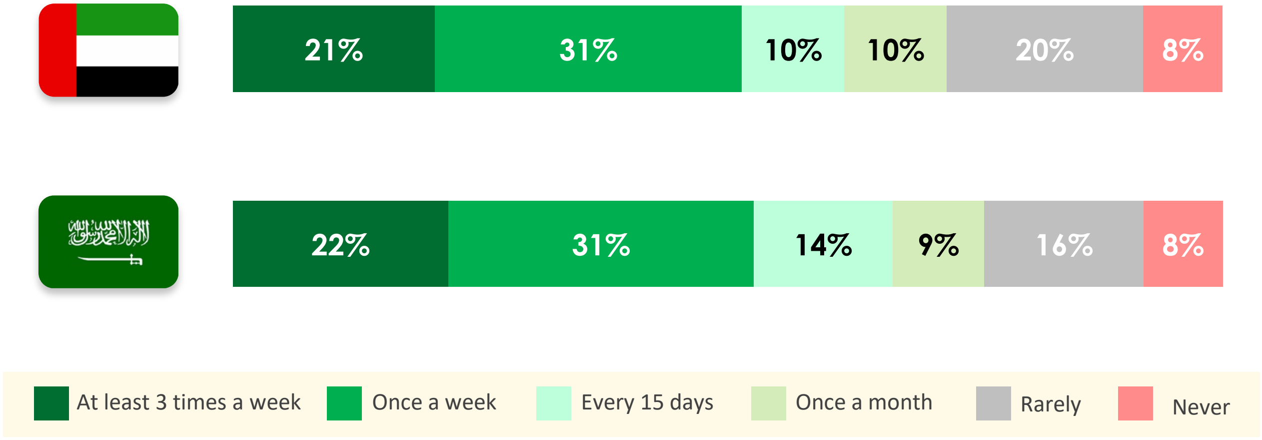
Health Enthusiasts	39%	43%	I am focussing on **adopting** a 'free from food' lifestyle as it is considered **healthy**.	I want to **adopt** a 'free from food' lifestyle as it is considered **healthy**, but I **can't afford.**
Experimentalists	22%	21%	I **consume** products 'free from food' **sometimes** as I **like the taste**.	I **consume** products 'free from food' **sometimes** while **eating with my friends/relatives** who eat such food.
Medical concerns	10%	12%	I am focussing on **adopting** a 'free from food' lifestyle as I have some **intolerances/allergies**.	
Don't belong here	29%	25%	I am **not interested** in adopting a 'free from food' lifestyle as I don't have such intolerances /allergies.	I am **not aware** of any intolerances/allergies that I may have.

Base: All Respondents

Q. Which ONE of the following statements is applicable to you, when it comes to consuming 'Free-from foods' products?

~20% of the Middle Easterners claimed to be **consuming free from food multiple times a week.**

Free-from Food Consumption



Base: All Respondents

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Q. How often do you consume the following types of food currently?

Willingness to pay premium for Free From Food

UAE	Saudi Arabia
28%	21%

UAE consumers exhibited greater willingness to pay premium for Free From Food vis-à-vis Saudi residents.

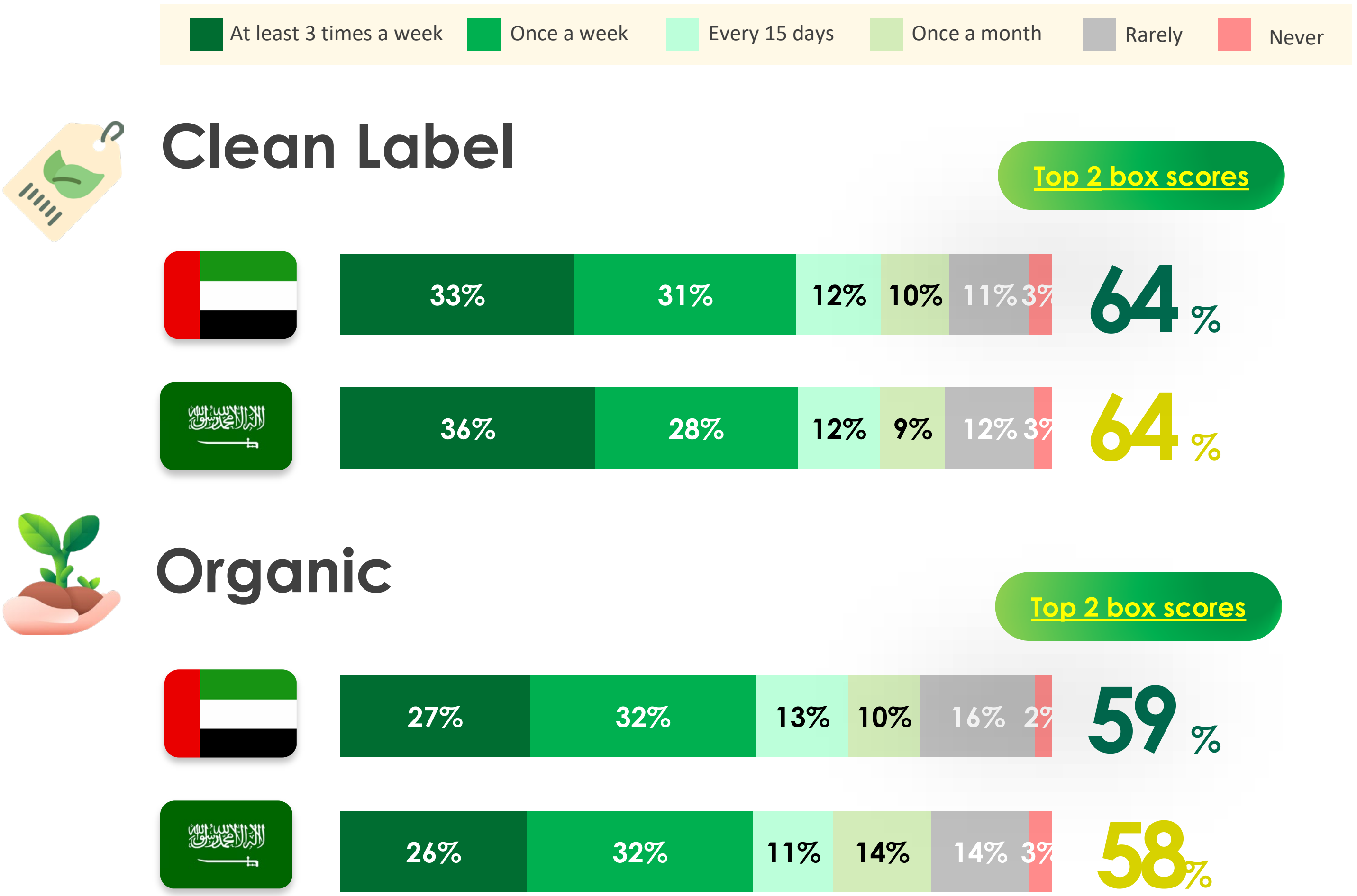
Base: All Respondents

Q. Some processes in food production make them more expensive for the producer. Which of these items do you deem relevant, for which you would be willing to pay more?

DISSECTING THE DEMAND OF

CLEAN LABEL & ORGANIC PRODUCTS

More than half of the Middle Easterners consume clean label and organic food products at least once a week.



Base: All Respondents

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Q. How often do you consume the following types of food currently?

Majority are consuming clean label and organic food products as an addition to their current diet.

Clean Label Products

As a replacement for the food that you consume currently	35%	32%
In addition to the food that you consume currently	58%	60%
I dont consume this	7%	8%

Organic Products

34%	32%	As a replacement for the food that you consume currently
60%	59%	In addition to the food that you consume currently
6%	9%	I dont consume this

Base: All Respondents

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Q. How would you classify your consumption of the below:

Middle Easterners expressed **greater** willingness to pay **price premium** for **organic products** than clean label products.

Willingness to pay premium for…

Clean Label Products	30%	25%
Organic Products	42%	35%

Base: All Respondents

Q. Some processes in food production make them more expensive for the producer. Which of these items do you deem relevant, for which you would be willing to pay more?

How can brands

CONNECT BETTER WITH CONSUMERS

AND GAIN TERRITORY?

Brands must be **honest** & **transparent**

51%	29%

...said that they are **concerned** with transparency in production process **more than they were 2 years ago.**

Base: All Respondents

Brands can
ENGAGE
consumers more by **sharing information** on…

Packages	65%	51%
Brand website	50%	40%
Social networks	42%	48%
Points of sale	35%	32%
News	32%	30%
Specialized apps	25%	30%

GREATER
CONSUMER CONFIDENCE
can be secured through
COMMUNICATING…

List of ingredients	58%	48%
Nutrition facts	58%	51%
Labels/certificates on pack	51%	43%
Trusted brand/producer	44%	43%
Consumers able to see product	41%	42%
Key messages on the package	36%	38%
Information on brand website	35%	33%

Base: All Respondents

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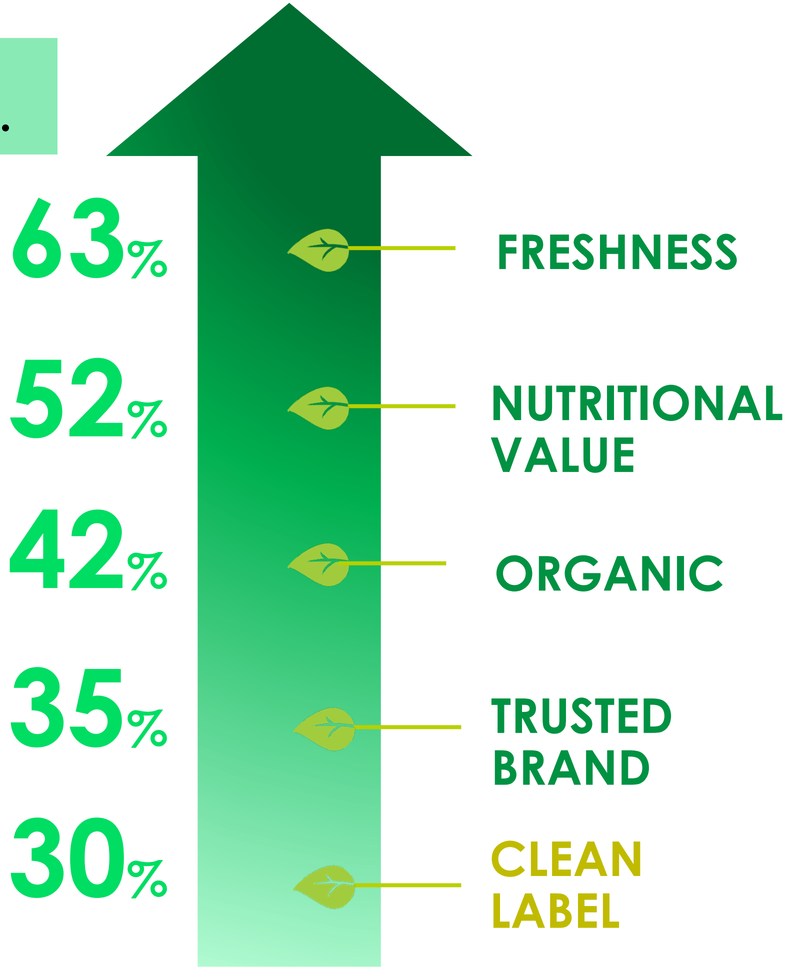
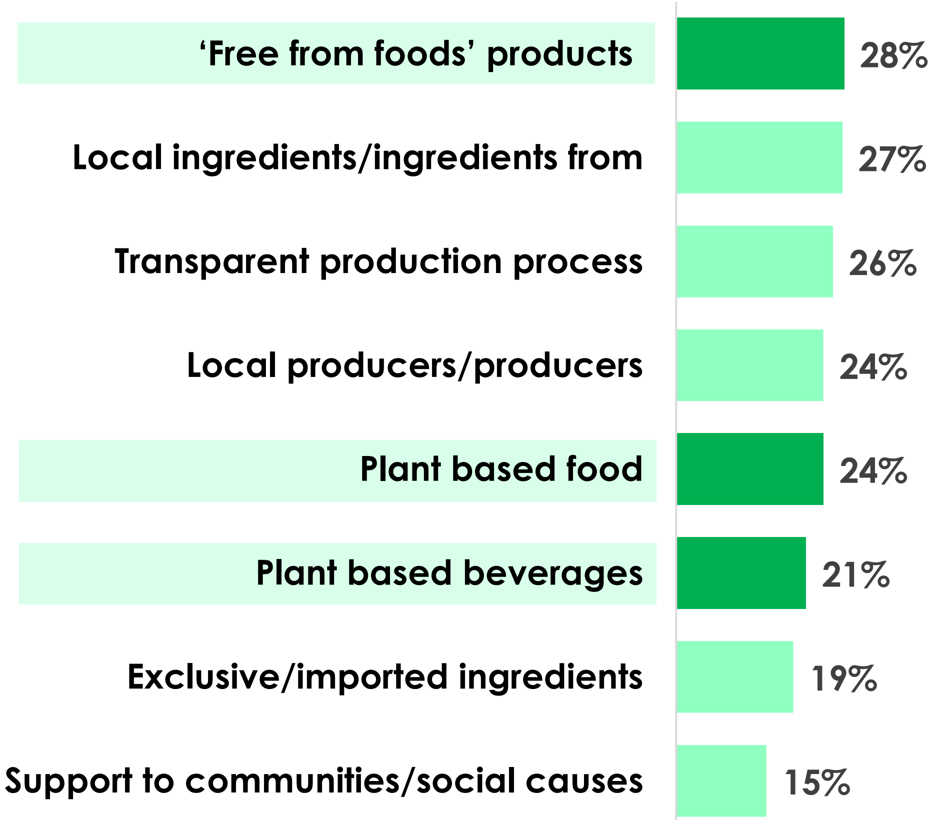
Q. how would you like this information on transparency in the production process to be disclosed? | Q22. Which of these elements gives you more confidence & security about what you're purchasing to consume?

UAE residents are happy to pay a higher price for fresh, nutritious & organic products from a trustworthy brand.

Willingness to pay premium for…



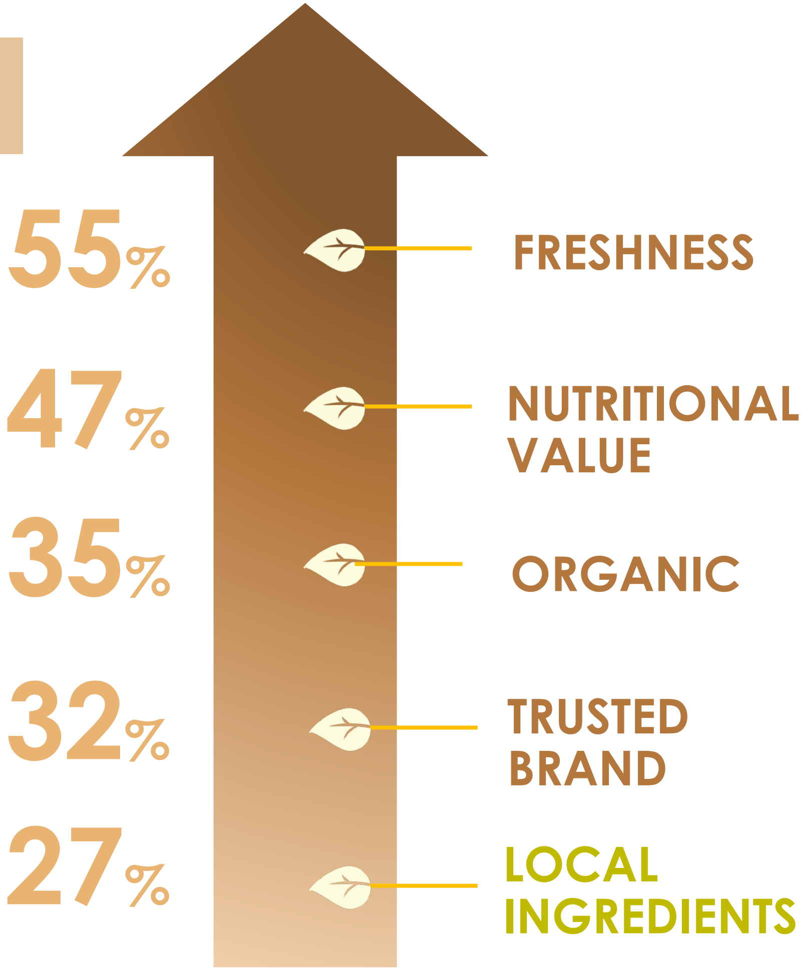


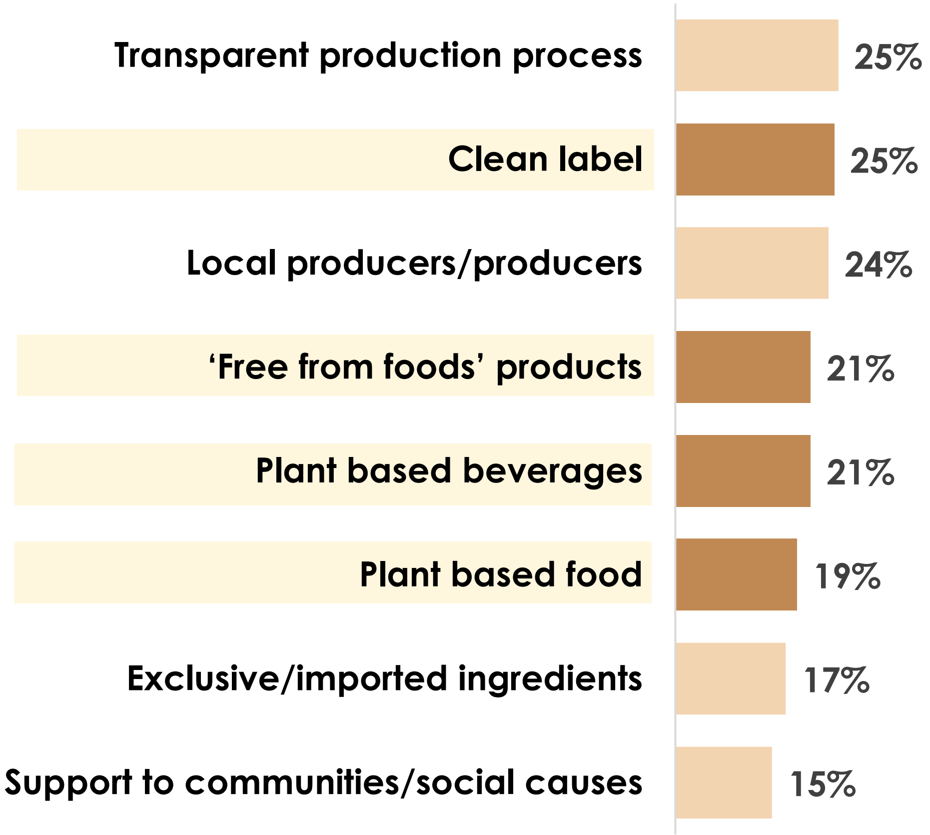
Base: All Respondents

Q. Some processes in food production make them more expensive for the producer. Which of these items do you deem the most relevant, for which you would be willing to pay more?

Use of **local ingredients** is in the top 5 attributes along with freshness, nutrition, organic & brand reputation that **KSA residents don't mind paying more for.**

Willingness to pay premium for…





Base: All Respondents

Q. Some processes in food production make them more expensive for the producer. Which of these items do you deem the most relevant, for which you would be willing to pay more?

KEY LEARNINGS

FOR BRANDS

Plant-based Dietary Regime

A spike in those calling themselves **flexitarians in UAE**. 'Plant-based diet' enthusiasts seems to have added it to their original diet instead of replacing it - **partial reversal to old eating habits has been confessed!**

Free from Foods Lifestyle

Having a **healthier lifestyle** emerged as the **biggest reason** for consumption - only ~10% have reported adoption due to intolerances.

Organic/clean label Demand

~60% of the Middle Easterners consume clean label and organic food products **at least once a week** – explains the substantial growth in demand.

Growth Formula for Brands

With the growing conscious consumerism, brands must be **transparent** about the ingredients used, nutrition facts, production process, etc. and **act sustainably**.

Report prepared by
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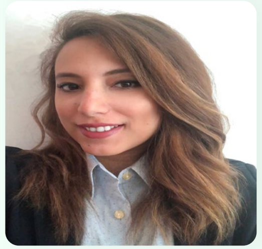

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