INTRODUCTION

Scope
Key findings

INDUSTRY SNAPSHOT

Inflationary pressure continues to drive value sales
Rice, pasta and noodles performs strongly
Sales benefit from back-to-basics mindset and new hybrid lifestyles

CHANNEL SHIFTS

Offline retail’s stronghold will be difficult to break
Channel shifts by category and region
Inflationary impact on disposable income influences retail channel shifts

RETAIL OFFLINE

Small local grocers gain the number two position
Diversity in retail channel preferences across regions
Shifts in lifestyles and inflation impact channel preferences
Discounters benefit from the cost of living crisis
Private label grows across all categories as consumers seek value
Private label penetration aligns with economic development
Private label is attractive to both emerging and developed market consumers

RETAIL E-COMMERCE

Internet retailing continues expansion after pandemic boom
Internet retailing expands across all regions
Asia Pacific shows strong e-commerce potential
Staple foods e-commerce lags similar industries
Family and novel products do well online, while fresh products are preferred in-store
Despite overall inflation mostly receding, food inflation still tends to be higher
Staples foods demand remains strong despite pricing headwinds
Price sensitivity and convenience drive retail channel growth
Value-seeking gives new impetus to retailers’ loyalty programme development

Key takeaways

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