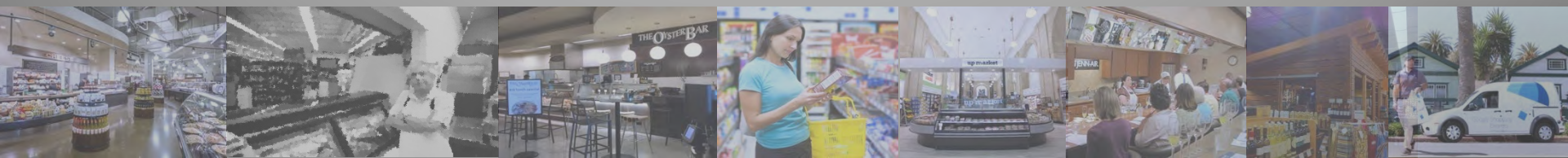
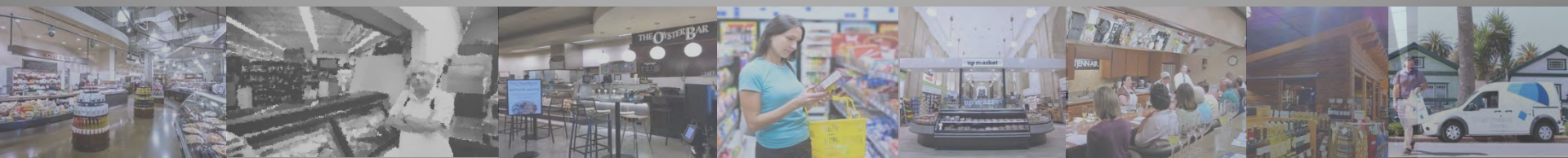
Observatório de tendências :

Como Consumidores e Varejistas estão mudando o mundo dos alimentos

abras Brasil

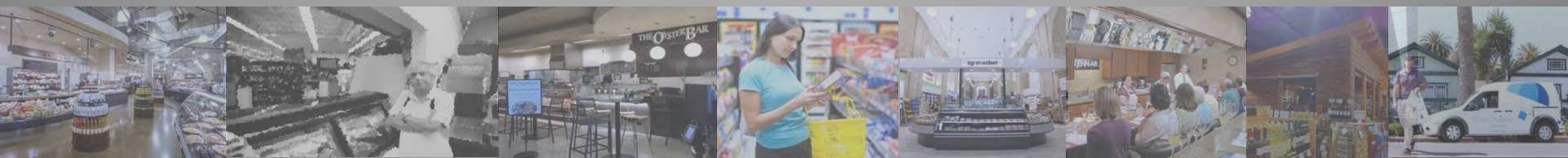


O que está por vir?



Por que esta Convenção da ABRAS Brasil é tão importante

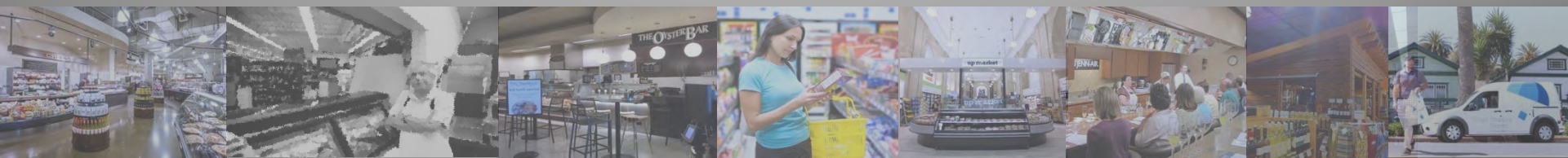
- **O consumidor precisa de mudança e evolução**
- **O cenário do varejo muda: lojas menores, mais serviços alimentícios, menos front ends**
- **Tecnologia & Mídia Social estão criando um novo mundo para produzir, comprar e preparar refeições, bebidas e lanches**



Projeções de Market Share EUA 2013-2018

Fonte: Willard Bishop

Supermercado Tradicional	• Diminui 2,9 • 36,2% Share
Supermercado Não-tradicional	• Aumenta 1,1 • 40,1% Share
C-Store	• Aumenta 1,1 • 16% Share
Formato Fresh	• Aumenta 0,9 • 2,1% Share
Dollar Stores (Loja 1,99)	• Aumenta 0,5 • 3,0% Share



Como será em 2025?

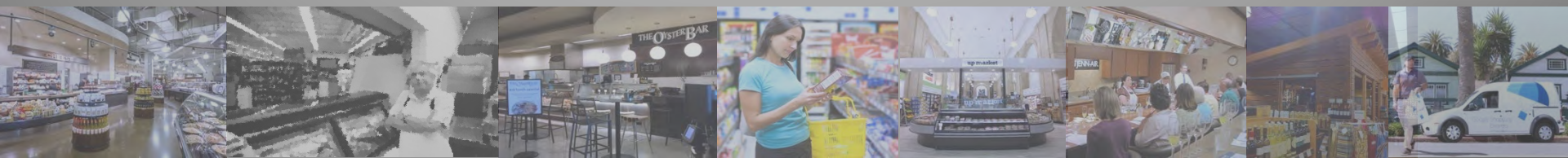
Tudo móvel?

Mais fresco?

Mais artesanal?

Mais caro?

Mais entregas?



A Oportunidade do Supermercado!

Um novo tipo de loja de alimentos que combina frescor, autenticidade, refeições prontas, serviços on-site (quiosques de cerveja, buffets, orientação nutricional) e se torna um pólo para a comunidade

Lojas menores

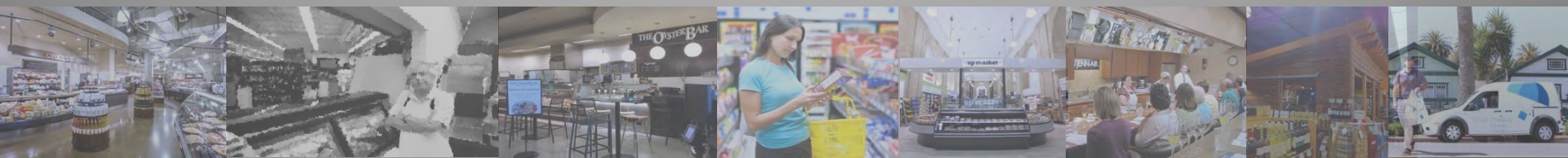
- 5.000 a 1.500 metros quadrados

Sortimento menor

- 40.000 SKUs a 20.000 SKUs

Mais serviços

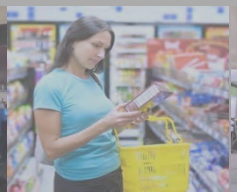
- Chefs, Açougueiros, Peixeiros & Sommeliers

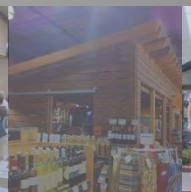



ALDI
FOOD MARKET
ALDI
FOOD MARKET


LIDL

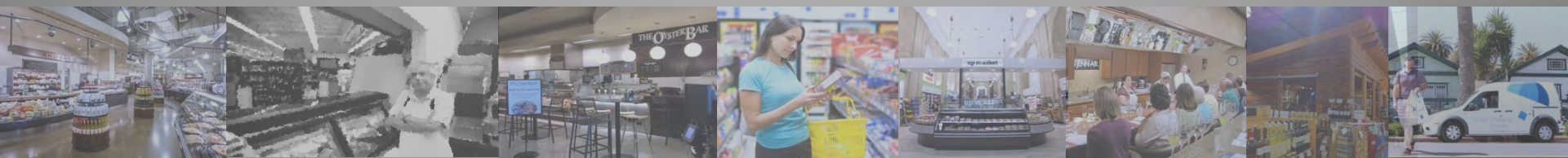

THE OYSTER BAR



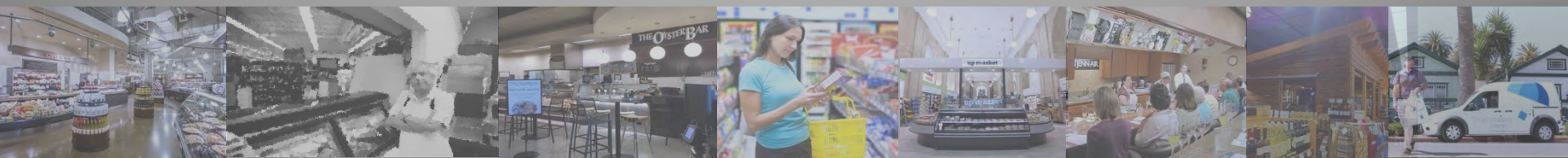


Tendências do Consumo

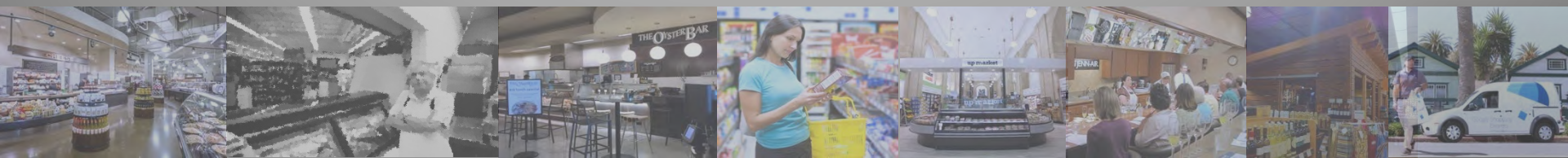
Como o Consumidor pensa?



A Experiência no Caixa

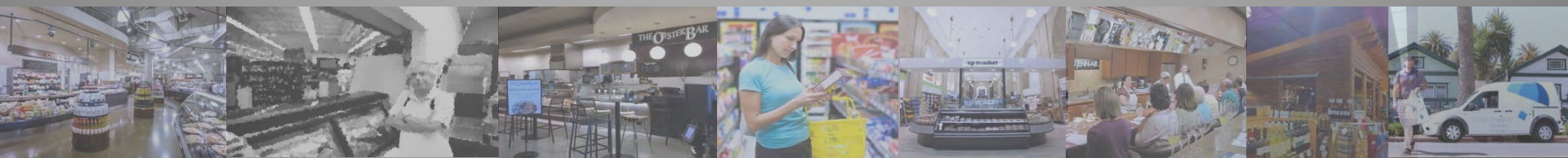


53% dos consumidores declaram que não gostam de fazer compras no supermercado…
14% dizem que “odeiam”



Entrega das compras

- ✓ Ainda na infância
- ✓ Qual o impacto de Google Express, Instacart & Uber?
- ✓ Como funciona o “ePayment”?



UBER

THE EVERYDAY ITEMS YOU NEED IN 10 MINUTES OR LESS

With the tap of your Uber app, restock your medicine cabinet, snack drawer, cleaning supply closet, and so much more in 10 minutes or less.

THE CONVENIENCE YOU LOVE,
THE PRODUCTS YOU NEED NOW.

Step 1

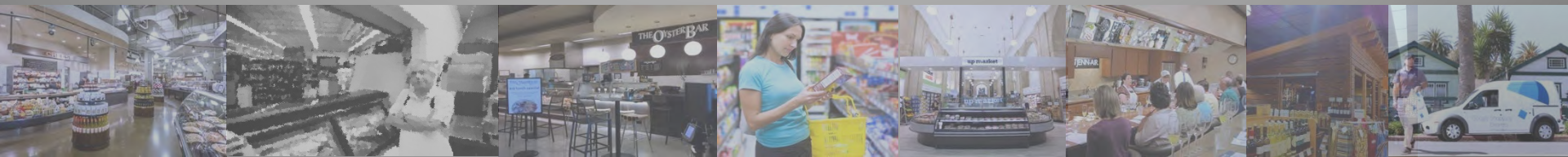
Select your groceries from 30,000+ items at stores like **Whole Foods**, **Trader Joe's**, **Safeway**, and **Costco**.

Step 2

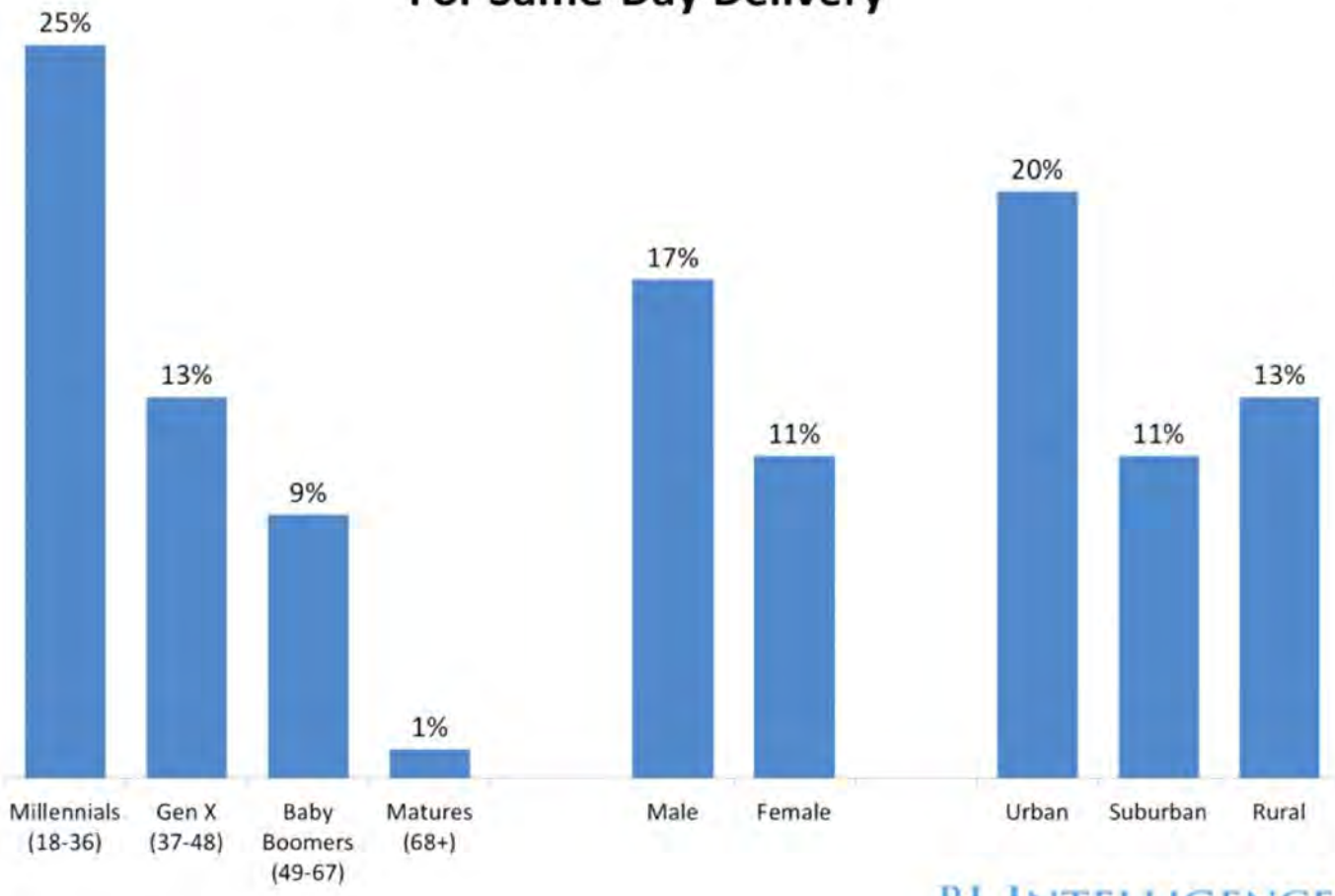
Instacart routes your order to a vetted Personal Shopper who collects your items.

Step 3

Your order is delivered in as little as 1 hour!

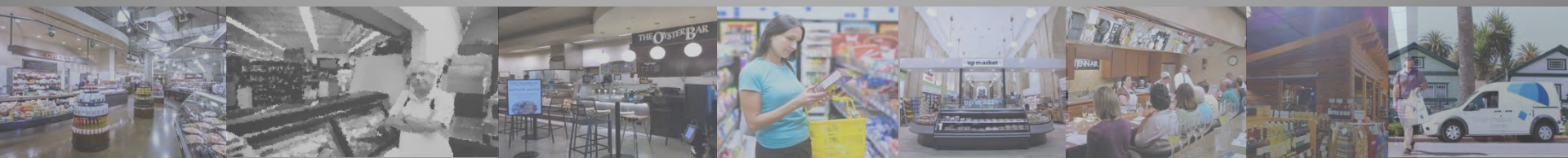


US Consumers Who Say They Would Pay A Premium For Same-Day Delivery

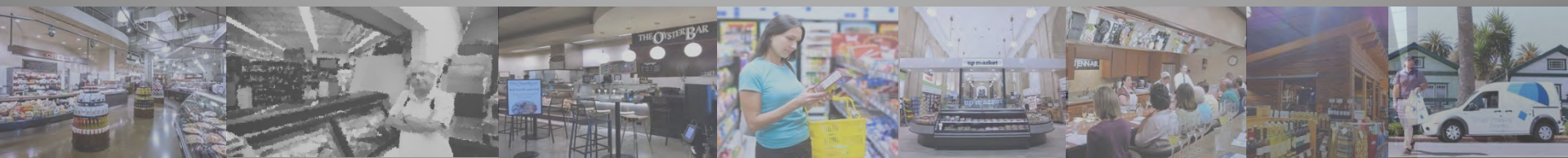


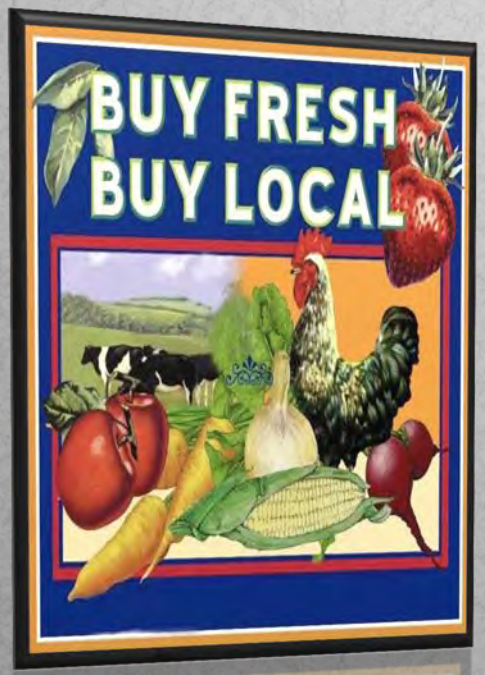
BI INTELLIGENCE

Source: Harris Interactive, June 2014



Local

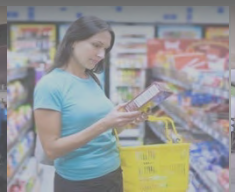


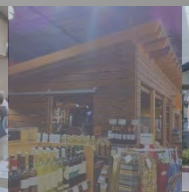

BUY FRESH
BUY LOCAL


FREE RANGE
EGGS
$4.00
Fresh
Eggs
For Sale
3 Sisters Cattle Co.

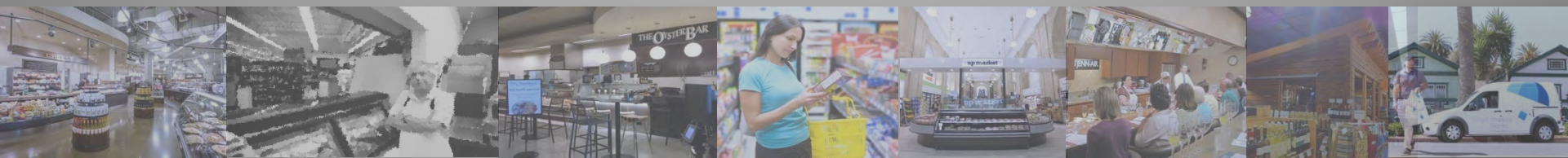

★FARM FRESH★
LOCALLY GROWN
VEGETABLES
& FRUITS




THE OYSTER BAR


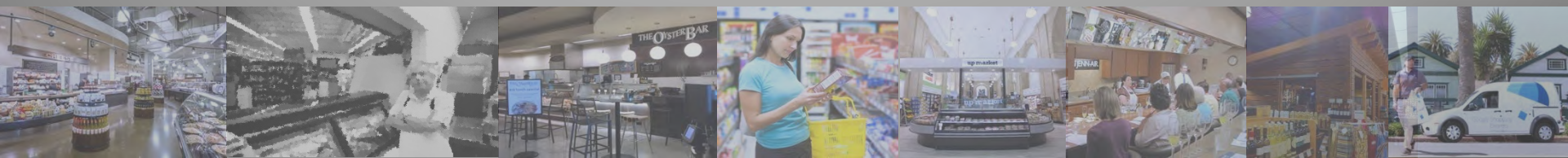

Até onde vai o “local”?

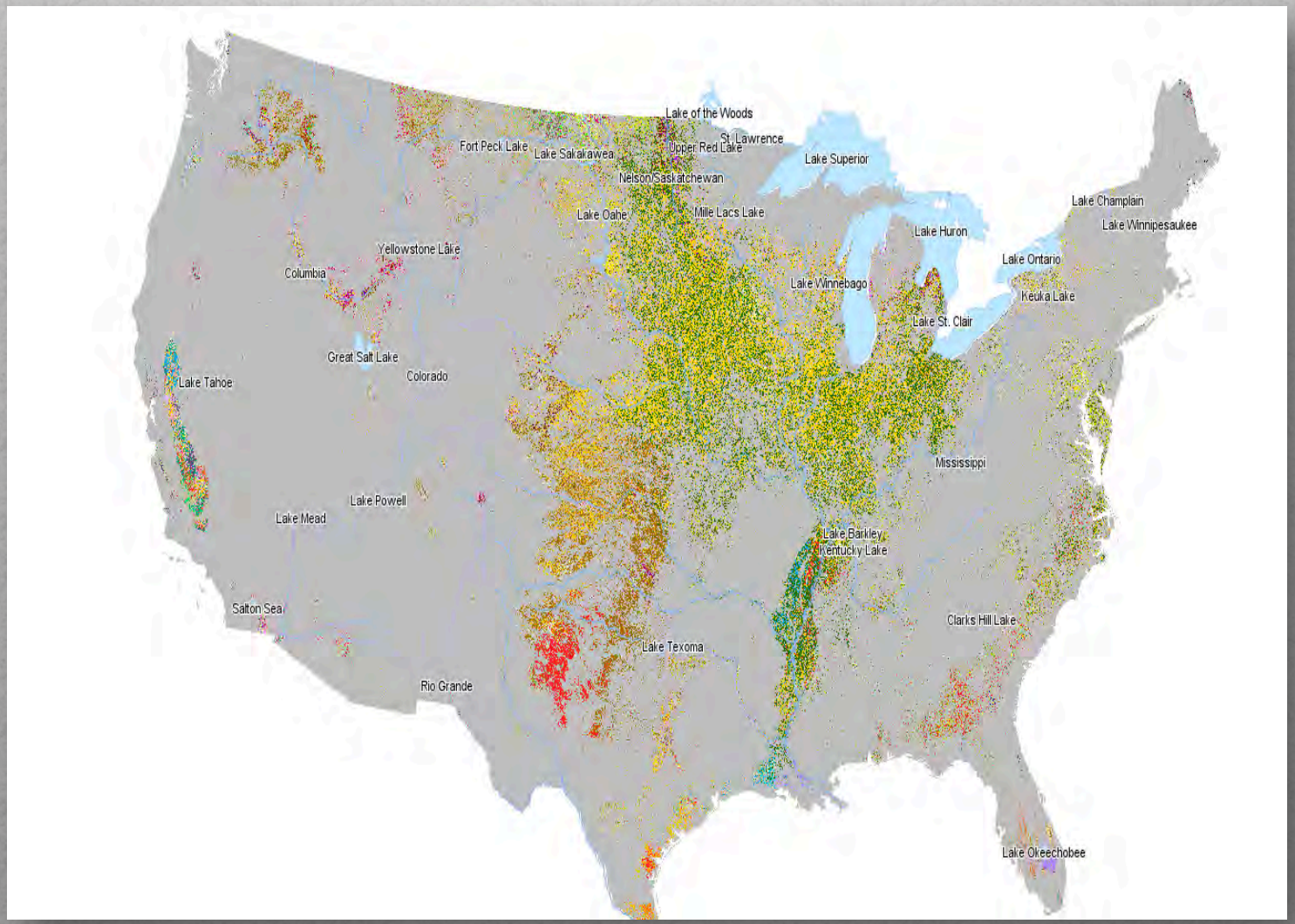


Pense em “bio-regiões”

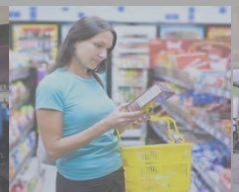
A natureza definiu quais culturas e rebanhos são mais apropriados para cada clima e região.

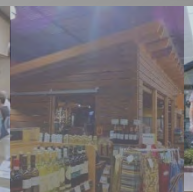
Estamos ouvindo?

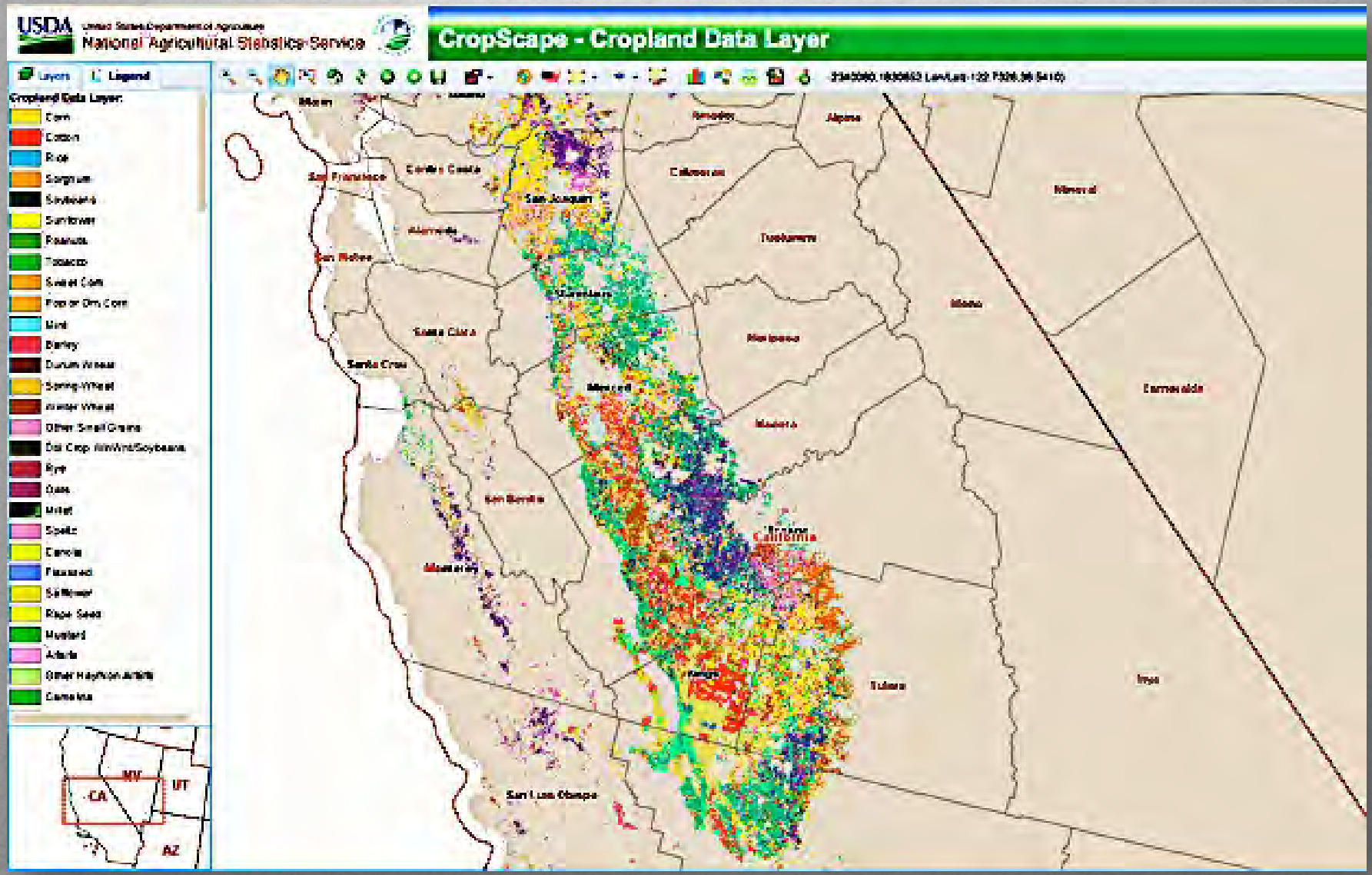


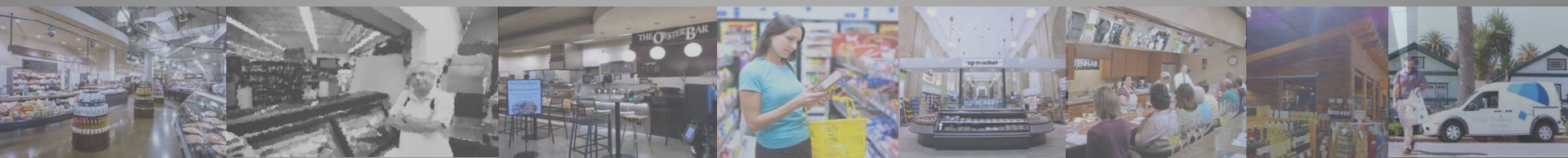

Lake of the Woods
St. Lawrence
Fort Peck Lake
Lake Sakakawea
Upper Red Lake
Lake Superior
Nelson/Saskatchewan
Lake Champlain
Lake Oahe
Mille Lacs Lake
Lake Winnipesaukee
Lake Huron
Yellowstone Lake
Columbia
Lake Ontario
Lake Winnebago
Keuka Lake
Lake St. Clair
Great Salt Lake
Colorado
Lake Tahoe
Mississippi
Lake Powell
Lake Mead
Lake Barkley
Kentucky Lake
Salton Sea
Clarks Hill Lake
Lake Texoma
Rio Grande
Lake Okeechobee




THE OYSTER BAR


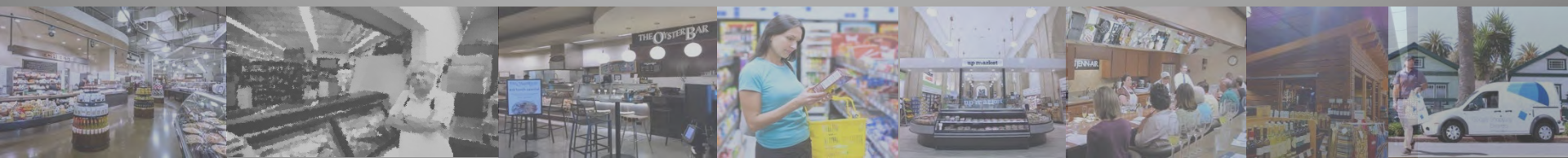





USDA
National Agricultural Statistics Service
CropScape - Cropland Data Layer
Layers
Legend
Cropland Data Layer:
Corn
Cotton
Rice
Sorghum
Soybeans
Sunflower
Peanuts
Tobacco
Sweet Corn
Pop or Orn Corn
Mint
Barley
Durum Wheat
Spring Wheat
Winter Wheat
Other Small Grains
Dbl Crop WinWht/Soybeans
Rye
Oats
Millet
Speltz
Canola
Flaxseed
Safflower
Rape Seed
Mustard
Alfalfa
Other Hay/Non Alfalfa
Camelina
Modoc
Lassen
Plumas
Sierra
Nevada
Placer
Yuba
Sutter
Yolo
Solano
Napa
Sonoma
Mendocino
Lake
Glenn
Colusa
Butte
Tehama
Trinity
Shasta
Siskiyou
Humboldt
Del Norte
Mariposa
Madera
Fresno
Kings
Tulare
Inyo
Mono
Alpine
Amador
Calaveras
San Joaquin
Stanislaus
Merced
Alameda
Contra Costa
San Francisco
San Mateo
Santa Clara
Santa Cruz
San Benito
Monterey
San Luis Obispo
Kern
California
Nevada
Utah
Arizona
MV
CA
UT
AZ

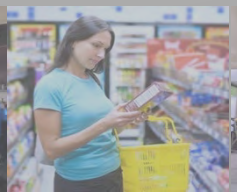

THE OYSTER BAR

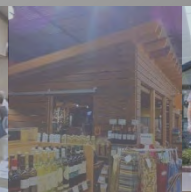
‘Megadrought’ may grip the Southwest

By 2050, will this be the new normal?

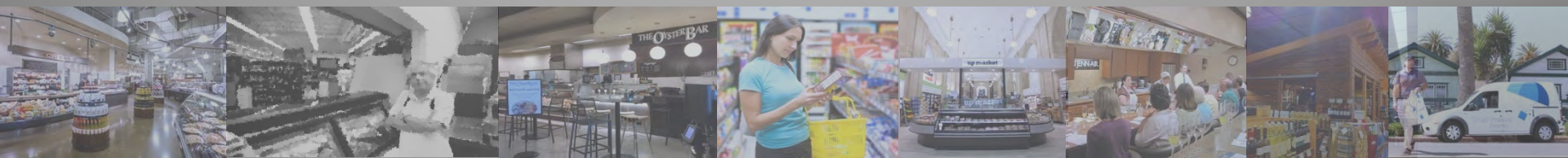




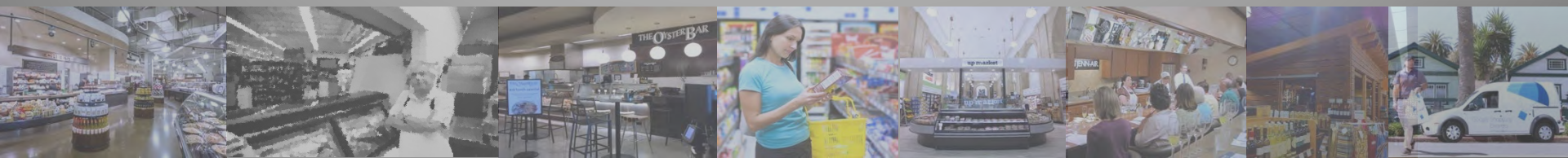

THE OYSTER BAR



A última palavra em “Local”

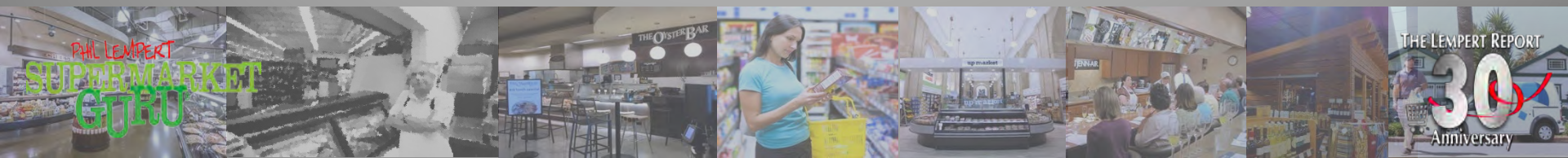


Gastronomia em Casa



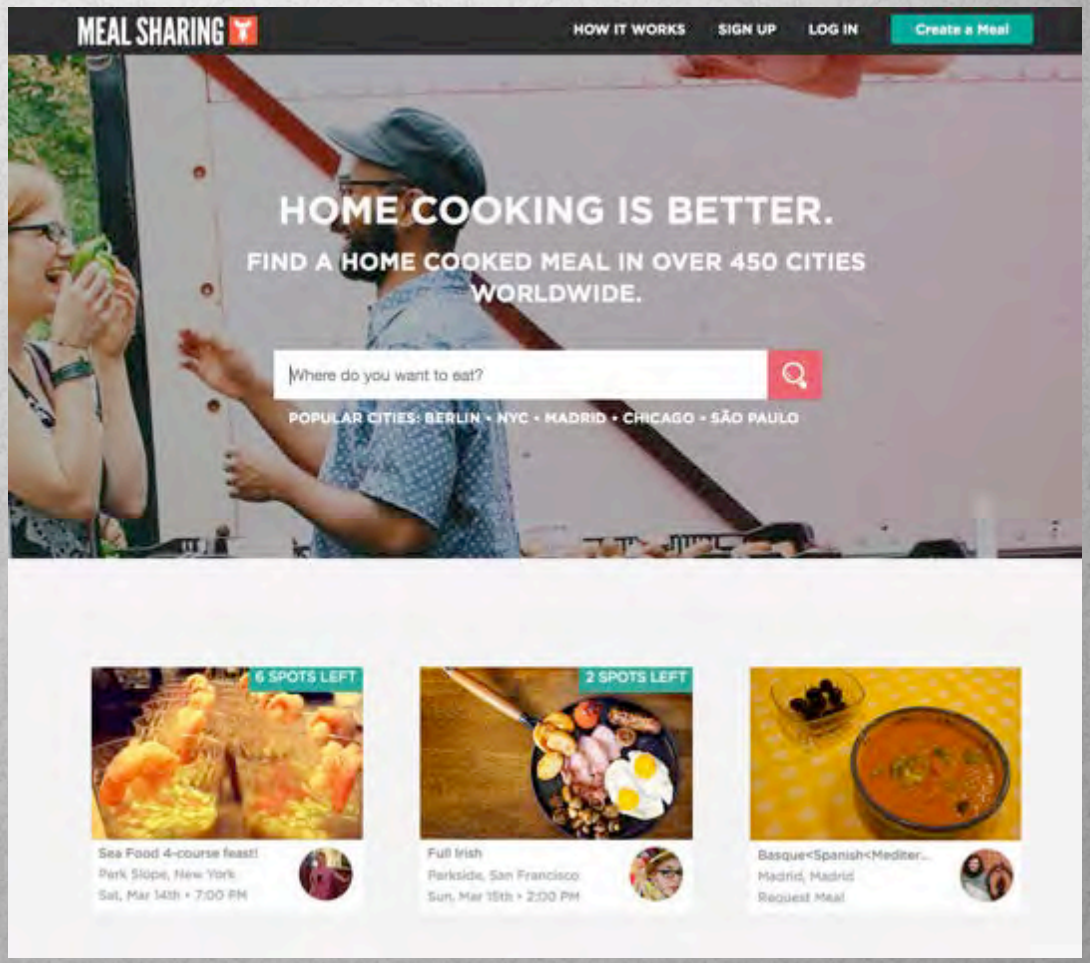
Gastronomia em casa

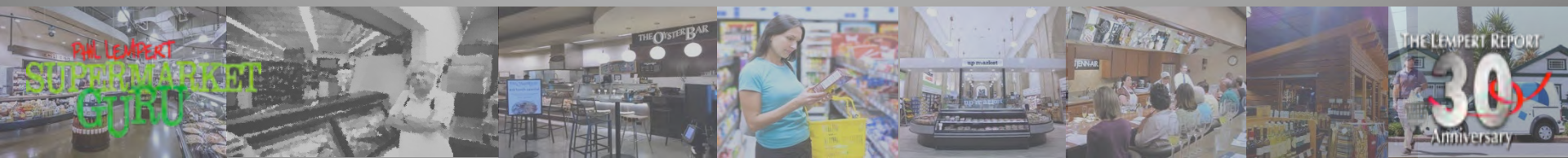
- ✓ 9 a cada 10 relatam que preparam jantar em casa 3+ vezes por semana
- ✓ Apenas 56% se sentem confiantes na cozinha
- ✓ 72% dizem que “querem melhorar na cozinha”



Gastronomia em casa

- ✓ Será que “refeições compartilhadas” serão a próxima grande ideia?
- ✓ Estilo de vida da Geração do Milênio
- ✓ Estilo de vida da Mulher Indie
- ✓ Estilo de vida do Baby Boomer mais velho





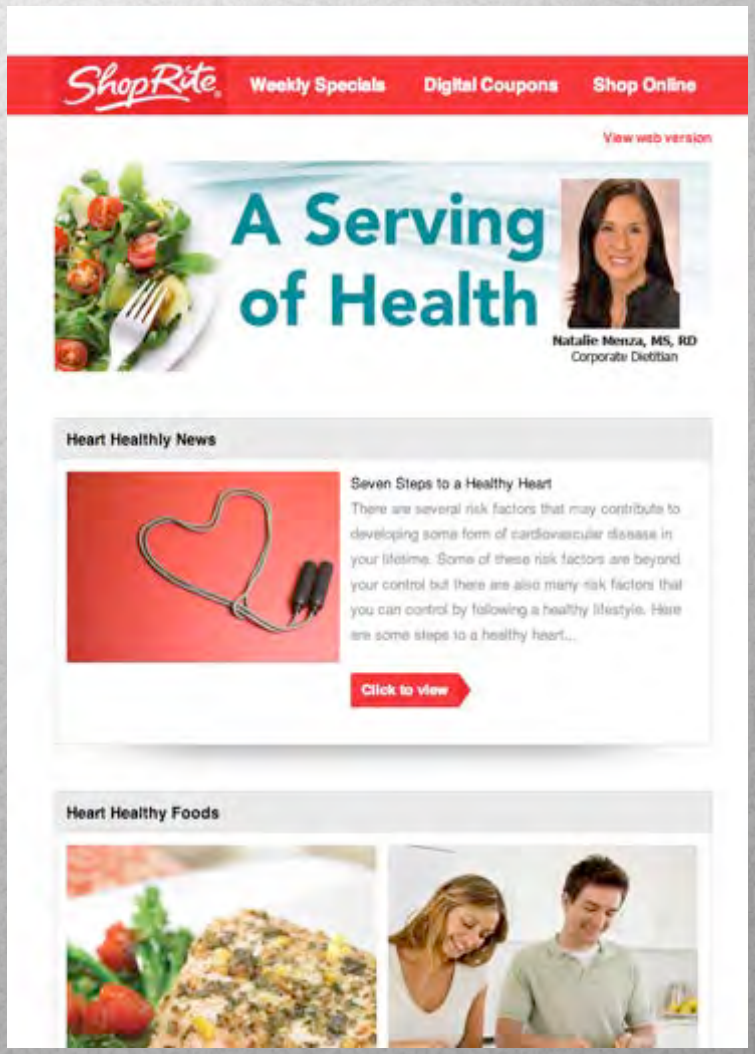
Nutrição & Saúde

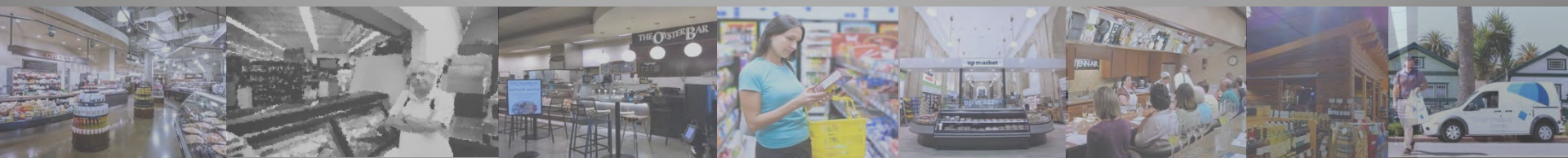
Fenômeno “Dr. Google”:

Internet é a fonte no. 1 para informações nutricionais

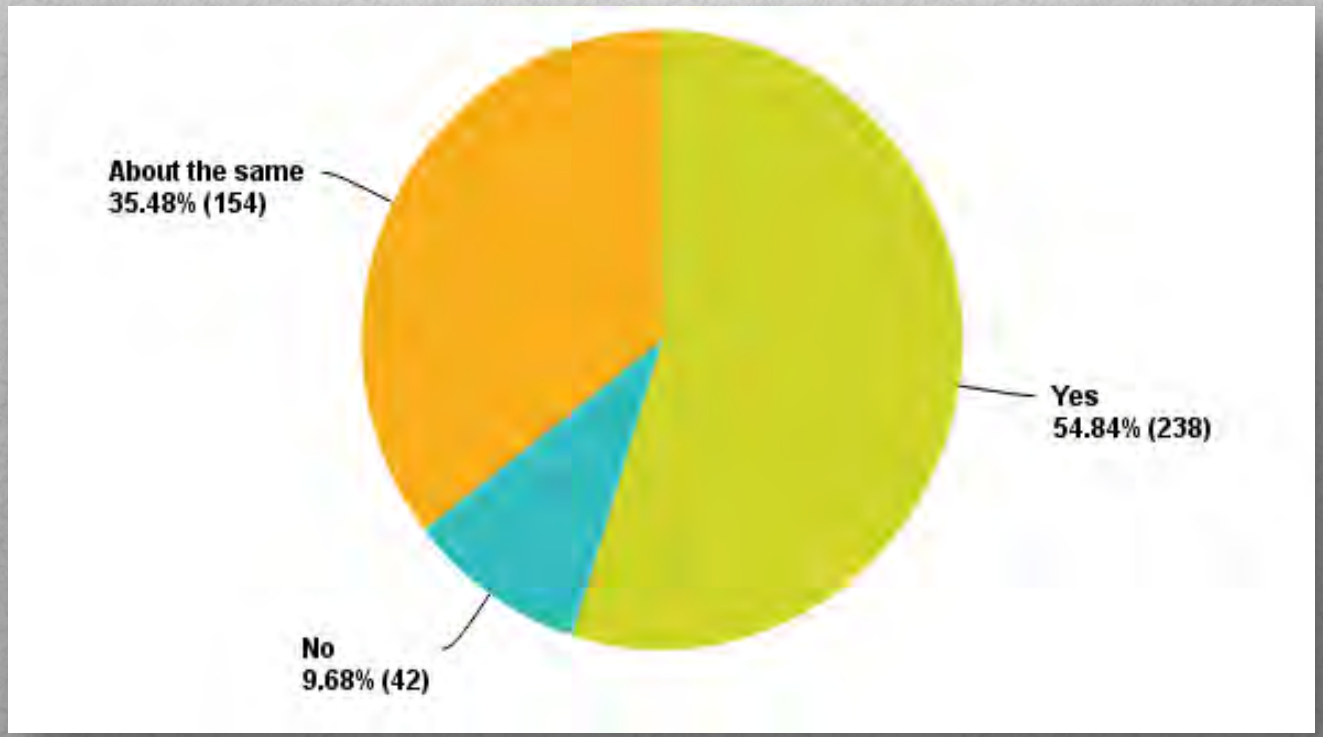
Nutricionistas vêm em 4º. lugar e médicos em 10º.

Quase metade (48,5%) diz que sua dieta poderia ser mais saudável

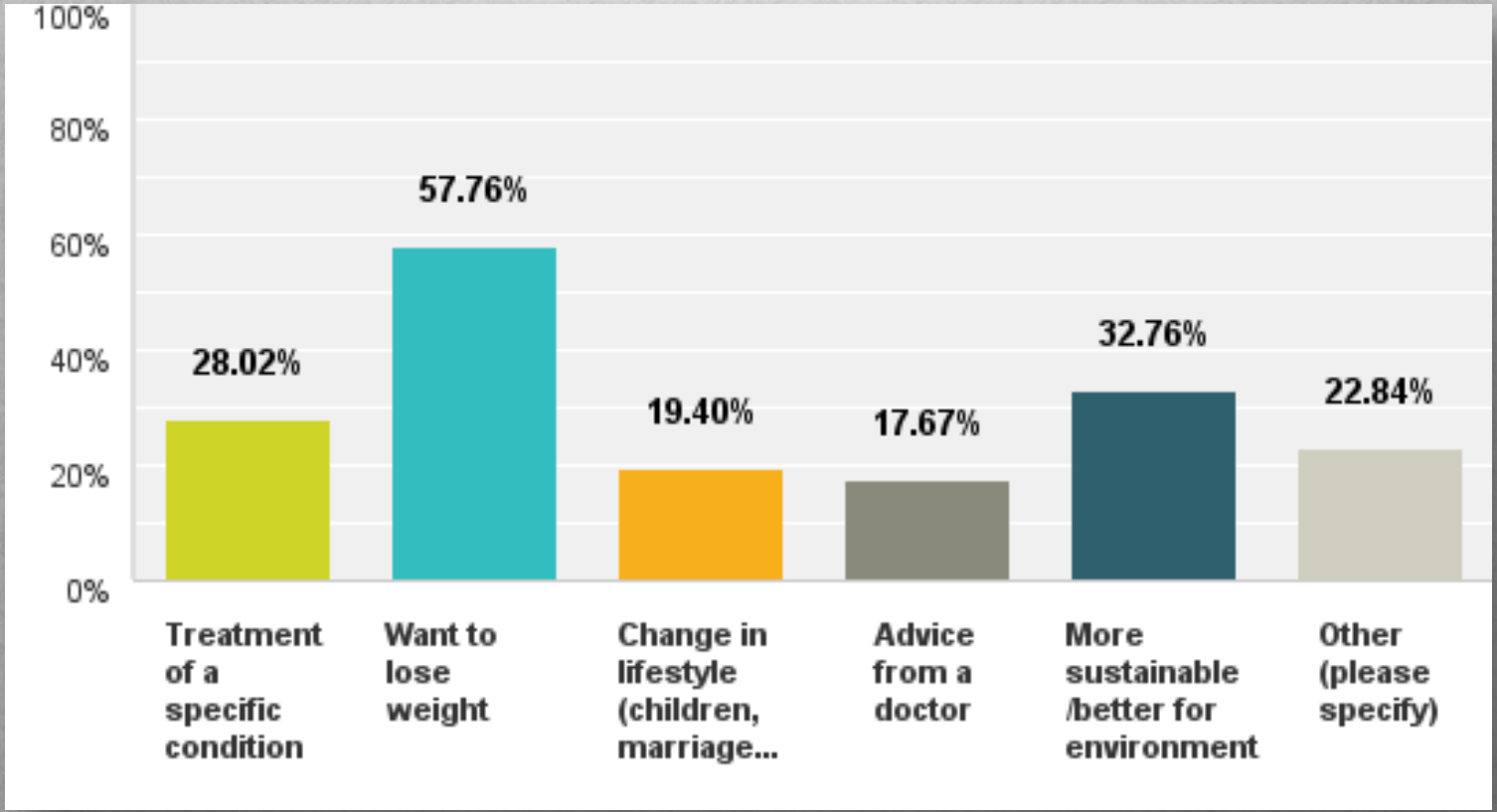


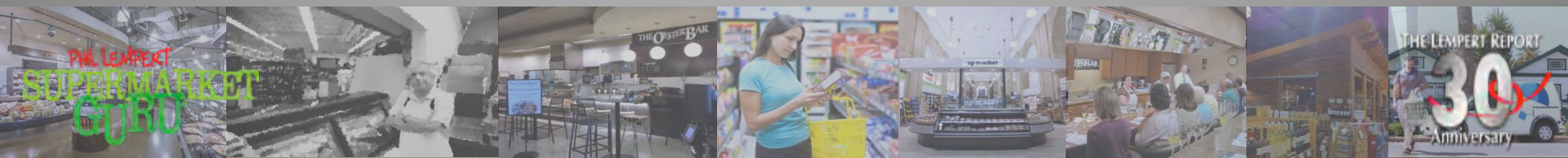


Você tem uma alimentação mais saudável do que há um ano?



Que fatores influenciaram sua decisão?



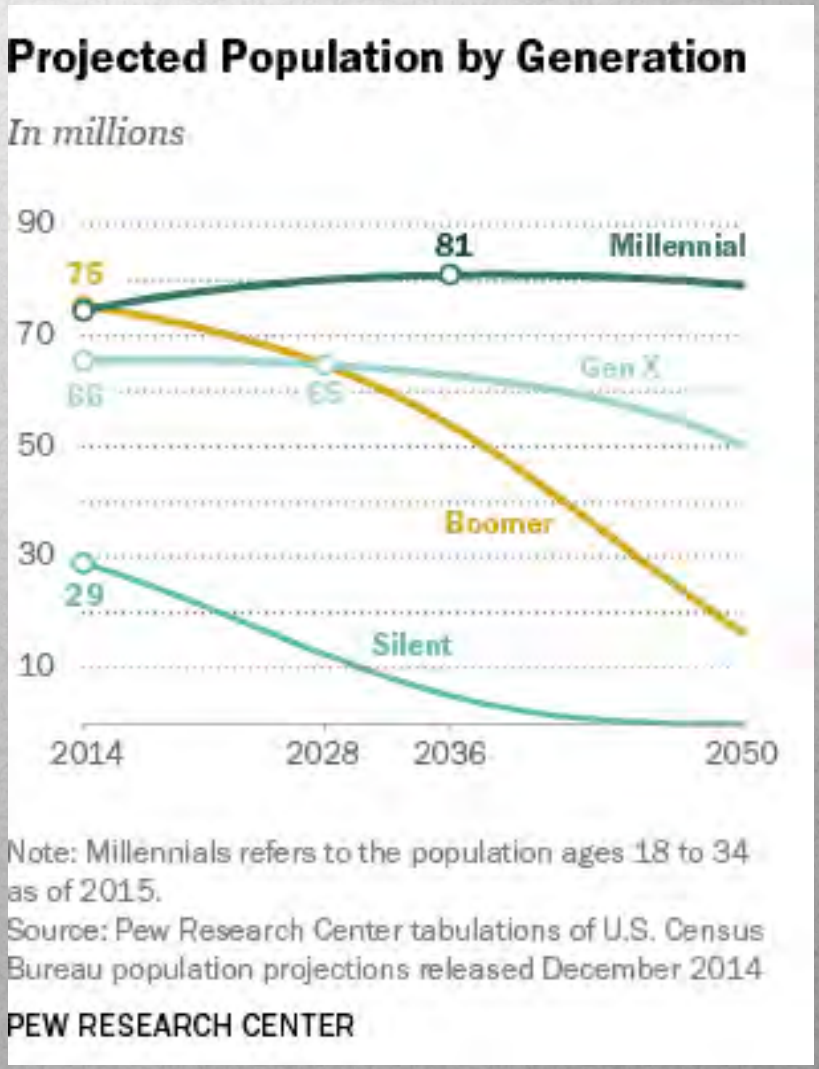


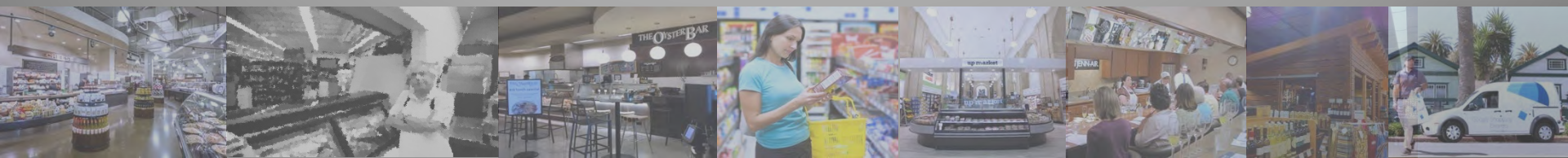
Q4 What do you find to be the most influential ways you obtain food and health information? (check all that apply)

Answered: 303 Skipped: 0

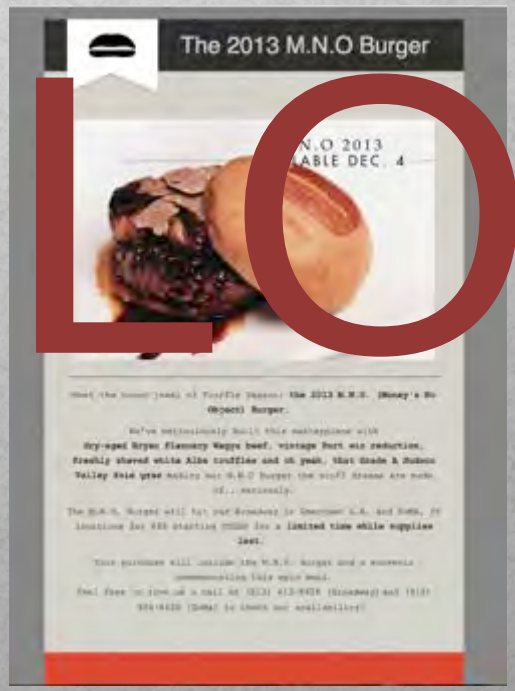
Hoje há tantos Millennials quanto Baby Boomers…

e eles lançam as tendências para alimentos

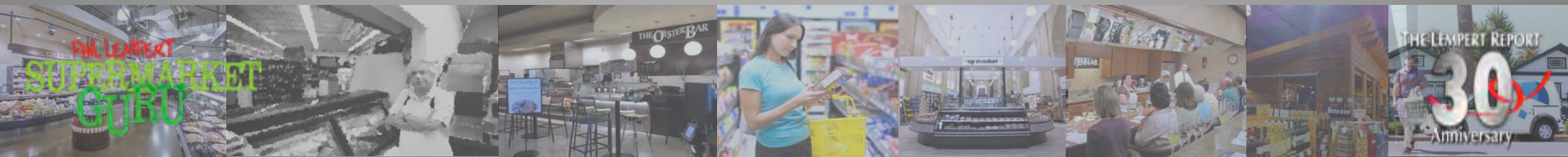




Eles acordam de manhã...



YOLO



Millennials são apaixonados

Food raves

Food trucks

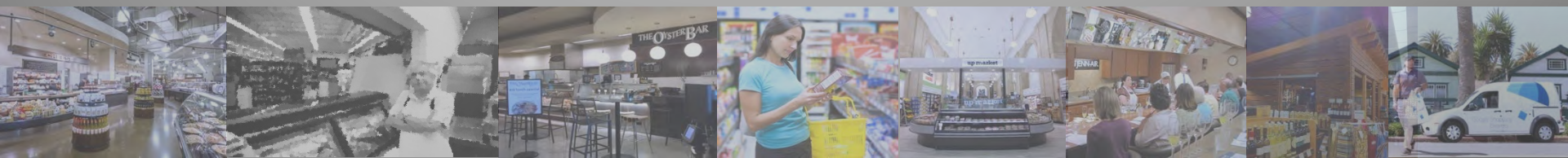
Dívida universitária

Empregos de baixos salários

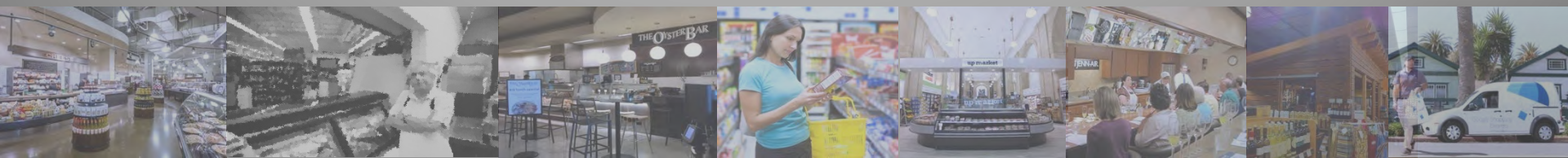
Moram com pais

Geração sem filhos

Conexão, conversa & comunidade



O Mercadorante

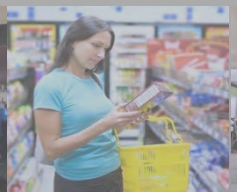



LUNDS&BYERLYS
KITCHEN
SHOP • EAT • DRINK • EXPLORE

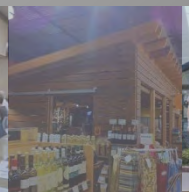

CHEESE

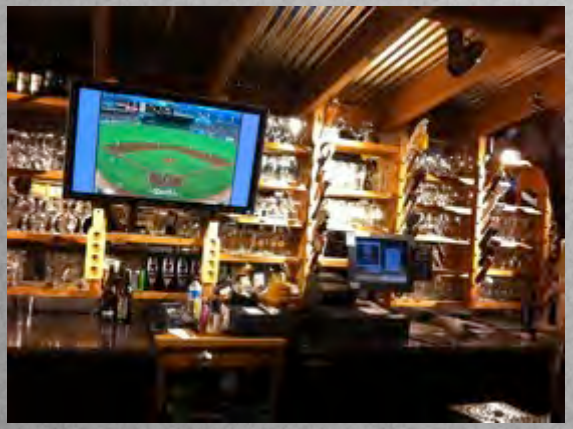

JENN-AIR


THE OYSTER BAR

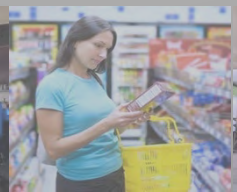


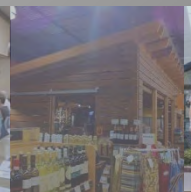

JENN-AIR






THE OYSTER BAR

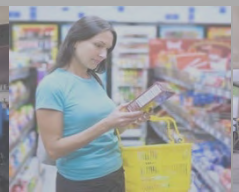


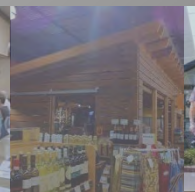


HyVee

MARKET GRILLE



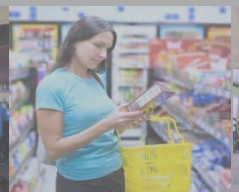


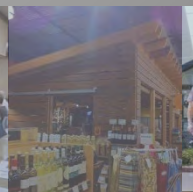





Order Here
Big appetites welcome!
SIDES
BBQ BEANS
HORSERADISH PICKLES
TEXAS-STYLE CHILI
SAUCES
TEXAS SWEET HEAT
KANSAS CITY
CAROLINA TANGY
Special
½ SMOKED CHICKEN
¼ SMOKED CHICKEN LEGS
BBQ
SANDWICHES
SMOKED BEEF BRISKET
SMOKED PORK
BBQ BRISKET SLIDERS
BBQ PORK SLIDERS
BY THE POUND
SMOKED BEEF BRISKET
SMOKED PULLED PORK
SAINT LOUIS STYLE RIBS
Safety Zone
2 SMOKED LIQUIMATERS +3
TODDS GREENS +3




THE OYSTER BAR


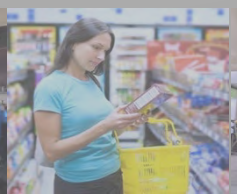



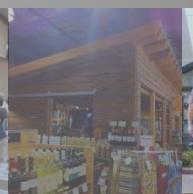


THE OYSTER BAR
THE OYSTER BAR
$12 lunch special
three Oysters (select varieties only), three shrimp, two crab claws and a cup of chowder.
| 11am - 3pm daily |


olive oil & balsamic
vinegar bar


THE OYSTER BAR

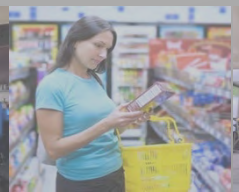


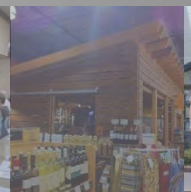



FRESH
SEAFOOD
SHRIMP • LOBSTER • SCALLOPS
$6.99
$5.99
$4.99


VILLAGE FOOD GARDEN
VFG
OYSTER
EXPERIENCE THE UNIQUE
OYSTER BAR


THE OYSTER BAR

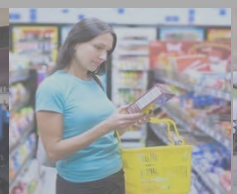


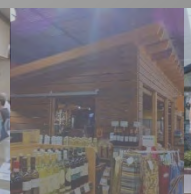



VIA SANTA CROCE
La Piazzetta
TRATTORIA & DELI
Handcrafted PIZZA
GOOD FOOD TAKES TALENT
MEAL DEAL
Mediterranean Table

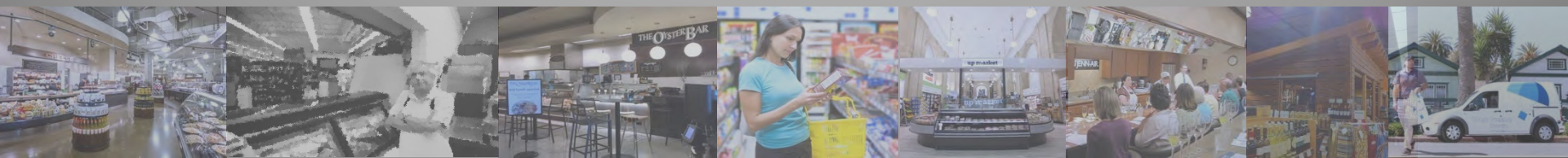

Diner
BURGERS • SHAKES • FRIES • FISH & CHIPS
Italian Table


THE OYSTER BAR



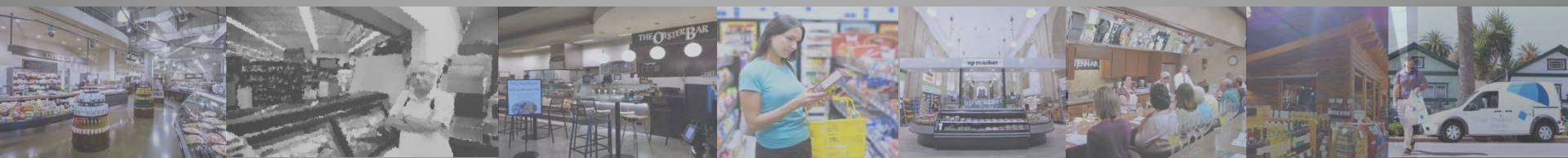


Smart Labels



É confuso??

- ✓ Rótulo na frente da embalagem
- ✓ Novo DGA & “Informações Nutricionais”
- ✓ Papel dos Nutricionistas de Varejo



Maravilha ou Caos?

Açúcar natural vs. Adicionado

Sem recomendação nutricional para Colesterol

Sem recomendação de sódio

Scientific Report of the 2015 Dietary Guidelines Advisory Committee

Advisory Report to the Secretary of Health and Human Services and the Secretary of Agriculture

Original vs. Proposed

Nutrition Facts
Serving Size 2/3 cup (55g)
Servings Per Container About 8

Amount Per Serving	
Calories 230	Calories from Fat 72
	% Daily Value*
Total Fat 8g	12%
Saturated Fat 1g	5%
Trans Fat 0g	
Cholesterol 0mg	0%
Sodium 160mg	7%
Total Carbohydrate 37g	12%
Dietary Fiber 4g	16%
Sugars 1g	
Protein 3g	
Vitamin A	10%
Vitamin C	8%
Calcium	20%
Iron	45%

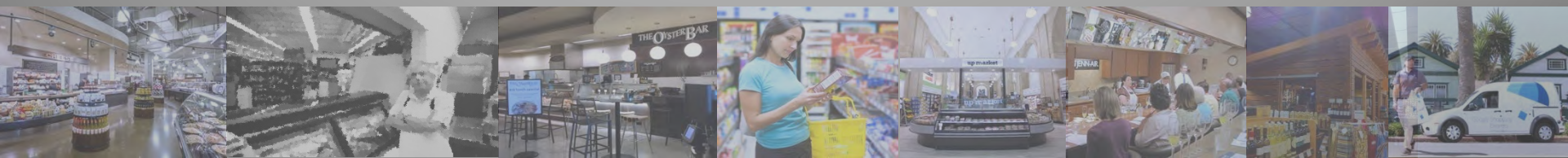
* Percent Daily Values are based on a 2,000 calorie diet. Your daily value may be higher or lower depending on your calorie needs.

	Calories:	2,000	2,500
Total Fat	Less than	65g	80g
Sat Fat	Less than	20g	25g
Cholesterol	Less than	300mg	300mg
Sodium	Less than	2,400mg	2,400mg
Total Carbohydrate		300g	375g
Dietary Fiber		25g	30g

Nutrition Facts
8 servings per container
Serving size 2/3 cup (55g)

Amount per 2/3 cup	
Calories	**230**
% DV*	
12%	**Total Fat** 8g
5%	**Saturated Fat** 1g
	Trans Fat 0g
0%	**Cholesterol** 0mg
7%	**Sodium** 160mg
12%	**Total Carbs** 37g
14%	**Dietary Fiber** 4g
	Sugars 1g
	Added Sugars 0g
	Protein 3g
10%	**Vitamin D** 2mcg
20%	**Calcium** 260mg
45%	**Iron** 8mg
5%	**Potassium** 235mg

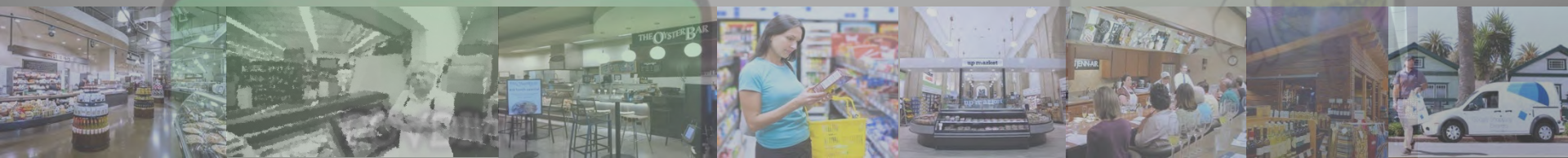
* Footnote on Daily Values (DV) and calories reference to be inserted here.




西瓜助理
豪华版
iWatermelon
deluxe!
LOADING

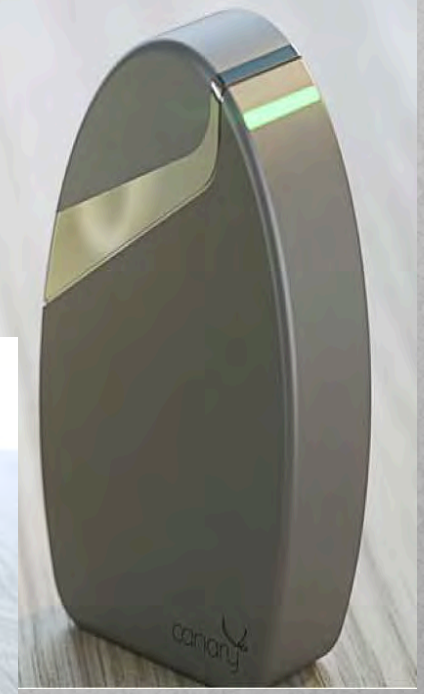

Step #2:
Choose the resembling color
of the watermelon:
Wealthy
Green
Mid - Yellow

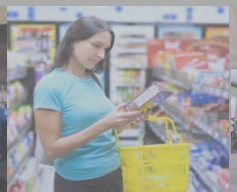

Step #3:
Place your iPhone on the watermelon
and tap the watermelon lightly 3 times
tap number: 2
example:

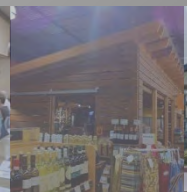


JOIN OUR WAITLIST

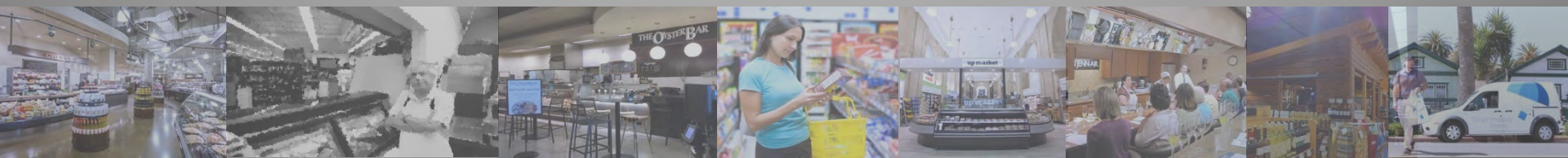
Meet Canary, the first portable and accurate gluten sensor. Canary gives you the confidence to trust your food and enjoy your meal

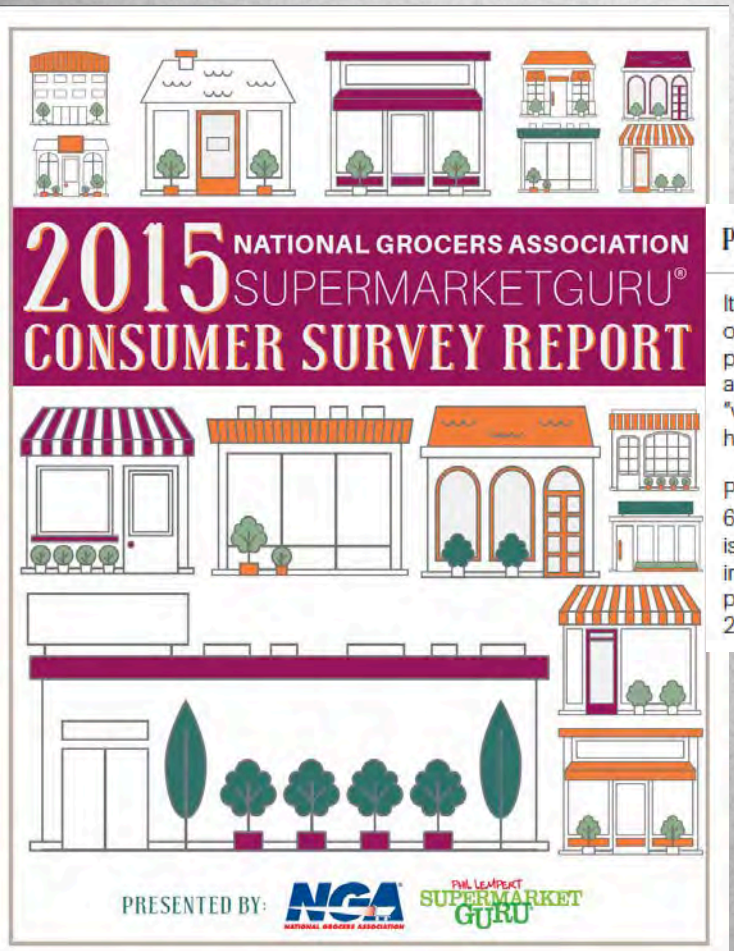






Shhh…As marcas próprias podem ser sua arma secreta



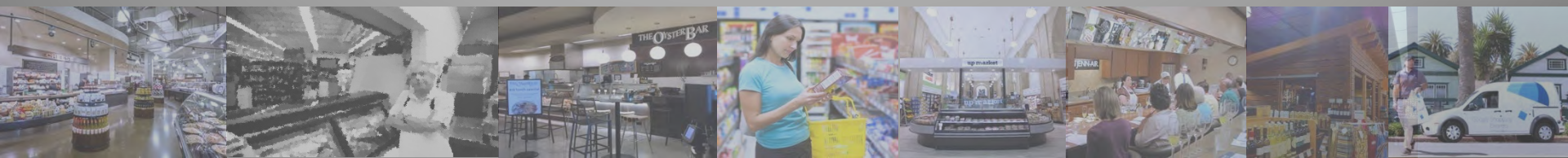


PRIVATE LABEL OR STORE BRANDS

It's more than a persistent desire to save that drives the influence of private label on store choice. It's also the product, variety and package upgrades retailers have made - these lead many to see PL as an acceptable alternative to brands at a lower price. This latest 67.7% "very/somewhat" important mark is very close to the 2010 recession high of 69.0%, when savings motivated pretty much all shopping lists.

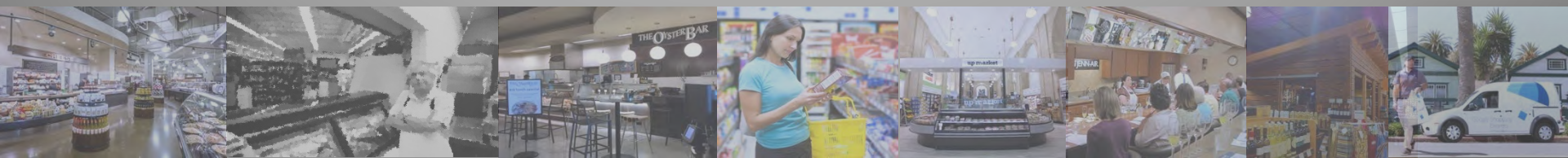
Private label's importance is near its highest level in four years - 66.5% in 2014, 64.3 in 2013, 65.6% in 2012, and 68.0% in 2011. This is a good sign for retailers seeking extra margin dollars and traffic in center-store, as well as a stronger value image through exclusive products. The "very" component did slip a bit, however, from 23.3% in 2014 to 22.4% today.

Very Important	22.4%
Somewhat Important	45.3%
Not Too Important	24.6%
Not At All Important	7.7%



Tendências para acompanhar…

- ✓**Lanchinhos na Terceira Idade**
- ✓**Tudo Defumado**
- ✓**Alimentos Fermentados**
- ✓**Alimentos “Artesanais”**
- ✓**Geração Z: Os Novos Chefs**



Phil Lempert
SUPERMARKETGURU®
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SupermarketGuru Today

Top stories from the past 3 days.

3 Days | Week | Month | All Videos | All Articles

ARTICLE	Can Gen Z Save Supermarkets and Brands?
VIDEO	Circle B Ranch, LLC Marina's Tomato Sauce Tomato Sauce
VIDEO	The Importance of Hispanic Millennials
VIDEO	Dang Foods Toasted Coconut Chips Savory Bacon
VIDEO	Why Are We Wasting Food?
ARTICLE	Sugar Alternatives That Are Good for You and Your Waistline

Articles

Can Gen Z Save Supermarkets and Brands?

A surge of younger consumers will bring vital tech and social media skills, and impressive buying power, to food retailers.

Yes. But only if food retailers and CPG understand them as customers and employees, and shape their company cultures to appeal to the 18-and-under set as both employees and customers.

Why focus on Gen Z now when Millennials are…

August 18, 2015 Read More

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QUICK POLL

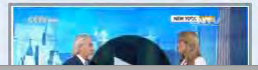
Are You Concerned About Food Waste?
Let Us Know

TAKE OUR SURVEY
let your voice be heard!

FEATURED

Cavuto Coast To Coast Food Prices on the Rise

Dr. Oz Sneak Peak: Can You Trust Your Supermarket?



Phil Lempert
SUPERMARKETGURU®
Marketing Analysis, Issues & Trends

August 17, 2015
DAILY INSIGHTS

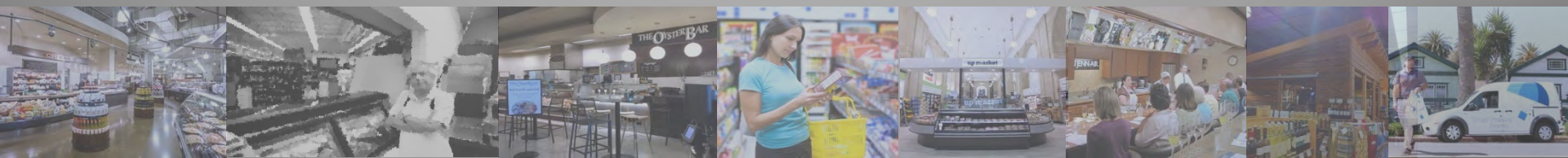
Why Are We Wasting Food?

We know food waste is a problem, so why exactly do we as consumers keep wasting food?

PHIL'S FOOD REVIEWS
Dang Foods Toasted Coconut Chips Savory Bacon
Better than bacon? That's what it says on the label, and maybe health wise, but flavor wise?

SUPERMARKETGURU
Sugar Alternatives That Are Good for You and Your Waistline
With all of the controversy around sugar, it's no wonder people are looking for natural alternatives. Here are four truly natural alternatives you need to know about that are popping up more and more in foods and beverages around the supermarket.

QUICK POLL
Are you Concerned About Food Waste?
It is a growing concern, and more retailers, food producers and consumers are looking for ways to lessen food waste. How are you handling food waste in your household?



O futuro…

Trabalhe…

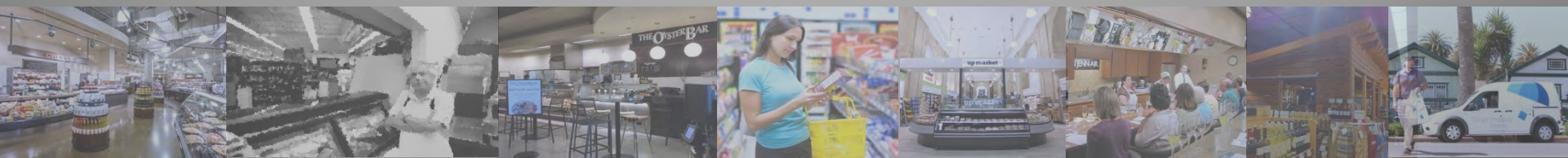
para a saúde & bem-estar

Crie…

uma experiência de encantamento

Celebre…

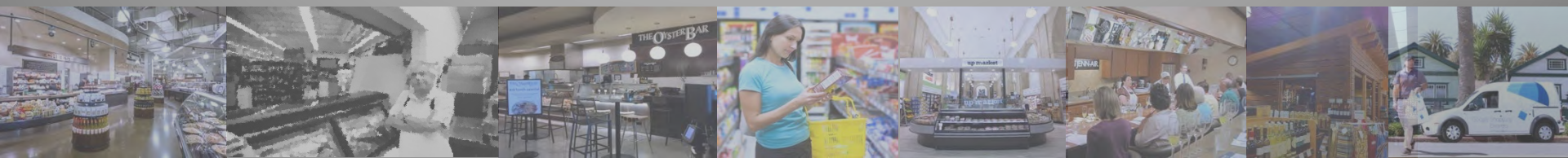
alimento, preparação, sabor




Lempert's
MILK
Lempert's
CREAM
JORALEMON ST. BELLEVILLE, N. J
PHONE
BELLEVILLE 2-
1079

3

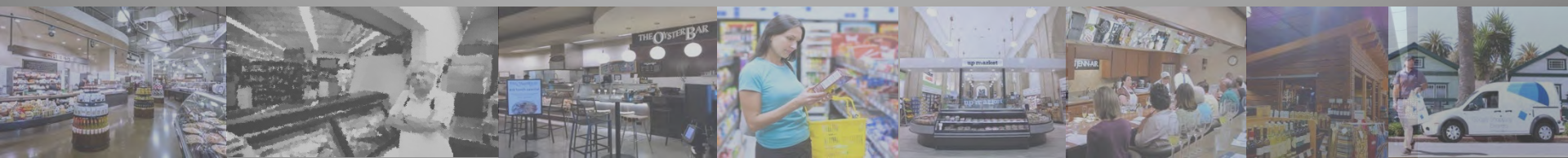
perguntas que você deve fazer



Qual a PRÓXIMA

GRANDE

tendência?

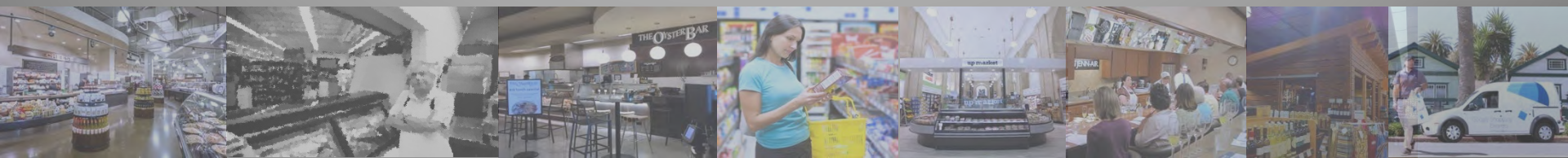


Quais são as

TRÊS

Coisas que você gostaria de saber sobre os

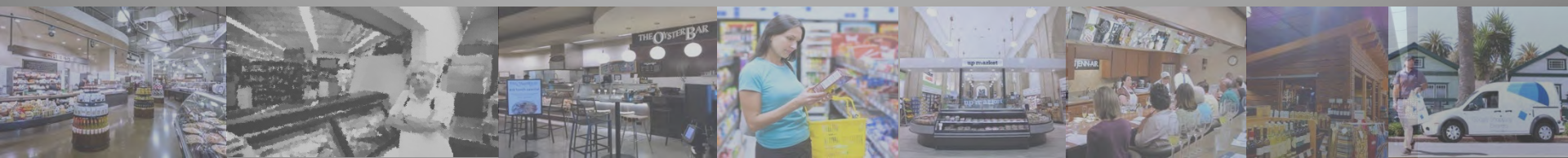
consumidores de alimentos?



Qual foi a

INOVAÇÃO

mais interessante que você notou no último ano que <u>não</u> é relacionada a alimentos?



Pensamentos Finais

- Consumidores querem mais informações sobre alimentos
- Consumidores estão entediados
- O Mundo dos Alimentos está em evolução
- Foco nos relacionamentos
- Pense além da lealdade, pense na “defesa-advocacy”