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Regional trends in the global bakery market

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Introduction and Methodology

This report examines key trends in the global bakery market, with a specific focus on regional trends. The report covers five key tends that are influencing consumer attitudes and behaviors in 2020 and beyond, providing data and insight from FMCG Gurus proprietary data and insight. Unsurprisingly, there is a specific focus on health, with consumers wanting clean label products that they believe to be natural, high in good ingredients and low in bad ingredients. Consumers are trying to lead healthier diets and lifestyles, especially in a COVID-19 environment as they look to maximize their health. This means that consumers want to continue to eat bakery products on a regular basis but at the same time, do not want such products to conflict with wider health goals. As consumers take a broader approach to health maintenance, they are also associating sustainable and local produce with being better-for-the- individual. These claims are also something that will intensify in importance amongst consumers over the next couple of years. Given the subjectivity of such phrases like natural, locality and subjectivity, validation is key. This is a reason why there will be growing demand for clean label style products that can offer authenticity around such claims.

At the other end of the spectrum, bakery offerings such as cakes & pastries and biscuits will be deemed ideal for small moments of affordable indulgence. Again, this is something that will intensify in 2020 and a COVID-19 environment, as consumers look for moments of daily escapism to deal with the pressures of everyday life. Bakery products will especially suit for such occasions because they can also offer moments of nostalgia and comfort, as well as facilitate sharing occasions as consumers re-prioritize what is important to them in life. This is something that will further drive demand for clean label, and better-for-you options so that products can offer taste and nutrition at the same time.

Executive Summary

Bakery products are a staple part of dietary habits across the globe, especially when it comes to items such as bread, cakes & pastries, and biscuits. As such, many of the trends being mirrored in the wider food market are particularly pertinent for the bakery industry. Over the last couple of decades, health has become the increasing focus of eating habits. Initially, priority was given to avoiding dietary evils and monitoring portion control as the number of people across the globe classified as overweight or obese increased. However, in recent years, consumers have adopted a broader concept of what constitutes healthy diet.

Indeed, consumers are no longer focusing better-for-you eating occasions purely around weight management regimes. In addition to this, consumers are paying closer attention than ever before to product formulation and ingredient and nutritional labeling on bakery products. This is because consumers do not just want to avoid ingredients such as sugar, but instead also want to increase their intake of ingredients that boost their health. This is something that is also resulting in a growing opportunity for fortified products. Central to all of this, consumers want products that they deem to be safe and high in nutritional value.

At the same time, it needs to be remembered that consumers are more skeptical than ever before when it comes to claims made by brands. This is because consumers can often feel that brands do not have their best interests at heart and can make misleading claims around health and nutrition to charge a premium price. Unfortunately for the industry, such skepticism tends to increase in times of uncertainty as consumers become more cost conscious and value-savvy and less brand loyal. This means in a COVID-19 environment, it will be more important than ever that brands are seen to be acting in the best interests of the consumer and being genuine when it comes to health and quality claims.

This is something that will drive demand for clean label style products in 2020 and beyond. It must be remembered that irrespective of such a phrase being hotly discussed for the last decade, clean label remains an industry-led rather than consumer-led claim. Indeed, simply branding something as clean label in the bakery industry alone will not drive sales. Instead, it is important that brands recognize what attributes are being promoted when it comes to clean label and promote these attributes in a clear and concise manner to consumers. As mentioned, natural is something of a subjective term and clean label means focusing on offering transparency around claims and providing reassurance that only real and authentic ingredients are being used in formulation. This can be done through streamlining ingredients and promoting artisan production techniques. Simplified nutritional labeling is also central to this, so that consumers can clearly understand what is inside the product that they have purchased.

Linked to the issue of clean label, authenticity is something that is important to consumers as they seek assurance that maximum care and attention has gone into the products that they purchase. This means referring to the origins of the brand, how the ingredients in products were obtained, specialized recipes and craft production techniques. The reality is that consumers will not pay close attention to every single element of the story. However, providing such authenticity is a way of offering assurance that maximum care and attention has gone into the making of the product.

As consumers become more attentive to their health, they will also want ingredients that they believe boost their wellbeing. This will become especially true in a COVID-19 environment as consumers become more attentive to their health. However even before the pandemic, consumers were paying closer attention to the ingredients used in products. Often bakery products are synonymous with the snacking industry and in recent years, consumers have re-prioritized what they look for when seeking out a snack. Indeed, focus is no longer on simply having an occasional treat. Instead, consumers want snacks to offer genuine nutritional value and compensate for skipped meal occasions. This is the reason protein bakery products have become increasingly popular in the mainstream over the last five years.

At the same time, it must be remembered that consumers who are turning to bakery products that are high in functional/fortified ingredients are everyday consumers, as opposed to those who engage in strenuous activity on a regular basis. As such, these products need to be seen to be compromise-free in the eyes of the consumers. Currently, consumers can demonstrate some concerns about the taste and texture of functional products. This is something that the bakery industry needs to address in the long-term if consumers are to continue to turn to products high in ingredients such as protein.

Whilst consumers have taken a broader approach to health maintenance, sugar remains the number one dietary evil for consumers. This is especially true given that consumers are aware of the link between obesity and diabetes and excessive intake. As a result of this, consumers are making conscious attempts to avoid sugar when it comes to bakery products and have favorable perceptions towards products that are free from sugar, have less sugar or contain no added sugar. However, at the same time, consumers can be conscious about the taste of products that contain reduced sugar or alternative sweeteners such as stevia, which is problematic given the continued importance of indulgence within the sector. As such, it is important any better-for-you option is not associated with compromised taste.

Reduced sugar intake will also be of high importance to consumers in 2020 and beyond because of weight management concerns arising from COVID-19. Consumers recognize that those who are classified as overweight or obese are more likely to suffer from health complications arising from the virus. Moreover, they also recognize that excess waistlines are something that can lead to health problems later in life. At the same time, many consumers state that they are exercising less and snacking more for comfort purposes throughout the pandemic, meaning that they are becoming more concerned about their waistlines. This is something that will have significant implications for the bakery industry, especially when it comes to categories such as cakes & pastries and biscuits.

When it comes to health, consumers are adopting a broader concept of what constitutes wellness. Linked to this, consumers are adopting the notion of Good for Me, Good for the Earth. This means that consumers feel that the issues of health and sustainability are interlinked. This is problematic at the same time for consumers, as many believe that significant damage is being done to the environment and this is something that is irreversible, leading to concerns about the quality of life for current and future generations. As a result, consumers are looking to make fundamental changes to their diets to address this. As well as being more resourceful with products, localized and plant-based claims are something that are growing in popularity amongst consumers and will directly influence purchasing habits within the bakery sector.

Again, the desire for environmentally friendly products within the bakery sector will intensify because of COVID-19. This is because consumers want products that they deem to be healthier for you at a time when they are attempting to minimize their vulnerability to disease and illness and as such, want products that they deem sustainable and to contain plant-based ingredients which are associated with being natural and nutritious. Moreover, consumers are also feeling a sense of optimism that natural resources can replenish themselves because of COVID-19, witnessed during restrictions on movement. This means that brands will have to take a more proactive approach to protecting the environment than ever before.

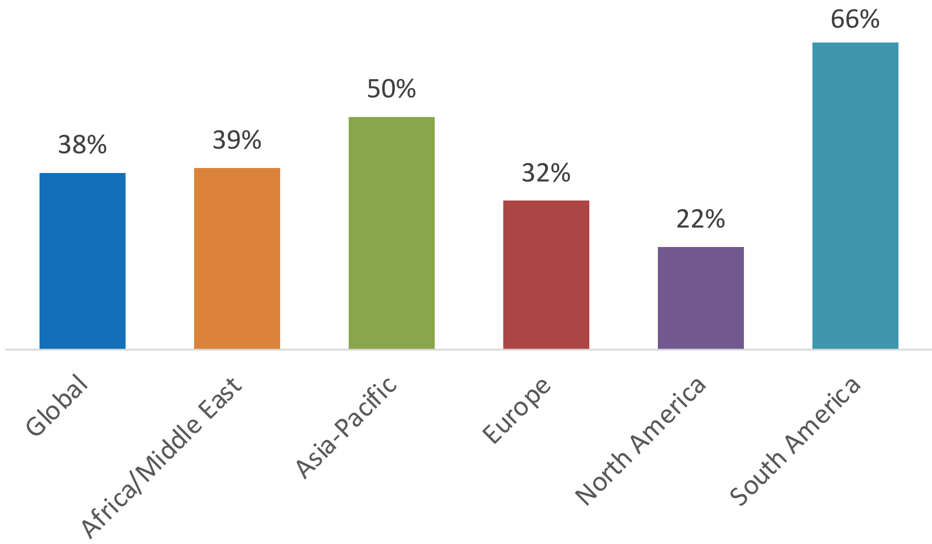
Whilst much attention will be given to health and issues relating to health in the bakery sector in 2020 and beyond, it is also important to recognize that indulgence remains an important factor when it comes to consumption occasions. This is because irrespective of any health goals that consumers may have, they continue to seek out products that they associate with indulgence. This is especially true in a COVID-19 environment. After all, a continued era of uncertainty is something that is having an adverse effect on the mental wellbeing of consumers, who are turning to small indulgences for moments of escapism. Given that many consumers feel that COVID-19 will continue to impact on daily lives for at least twelve months, these moments of escapism are something that will significantly shape bakery consumption habits.

Consumers want maximum transparency and clean label formulated bakery products

Consumers want reassurance that products are 100% natural

Clean label is something that remains something of an industry-led term as opposed to something that has a genuine influence on consumer purchasing habits. Indeed, research conducted over the period of 2019/2020 found that a total of 38% of consumers say that they have heard the phrase clean label when it comes to food and drink. Moreover, this figure is skewed somewhat by a disproportionally high number of consumers citing this in developing economies. However, whilst the term is one that is not overly familiar to consumers, the attributes behind such products are of high appeal to consumers. That is, consumers want products that they deem to be natural and contain real and authentic ingredients that offer a nutritional boost. In addition to this, they want to avoid ingredients that sound chemical. However, when it comes to the phrase natural, it is something that can be subjective in nature amongst consumers. It is also a term that some skeptical consumers believe can be used misleadingly to position a product as being healthier than it is or to charge a higher price. As such, consumers want maximum validation and transparency when it comes to claims. This is the reason for the importance of clean label style products in the bakery industry.

Proportion of consumers who say that they have heard of the concept of clean label when it comes to food and drink

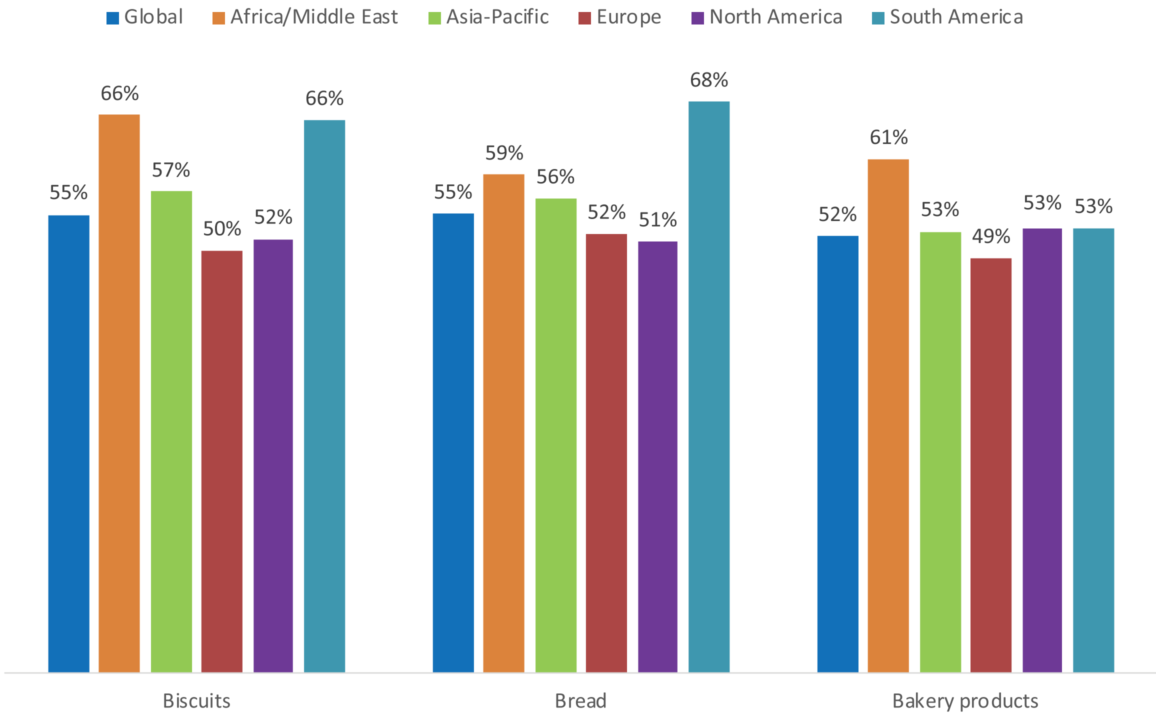


Source: Clean Label and Naturalness survey Q1 2019/Q1 2020

As such, rather than looking to define what constitutes a clean label product in the bakery sector, the industry instead needs to look for maximum reassurance when it comes to promoting natural claims.

FMCG Gurus research shows that natural claims are important in the bakery sector. This is because natural ingredients are associated with real and authentic ingredients, and these ingredients are deemed better quality, healthier, more trustworthy, and more sustainable. These are traits that are of favorable perceptions to the modern-day consumer.

Proportion of consumers who say it is important the following types of products carry natural claims



Source: Clean Label and Naturalness survey, Q1 2019/Q1 2020

Whilst naturalness is a claim that is important to consumers, it is one that can be subjective in nature, meaning many different things to different consumers. This is something that can actually be a disadvantage for the industry, as they may see a product labeled as natural and expect it to demonstrate certain attributes, whilst in reality it has been labeled natural for a different reason. This could lead to brands being seen to make deliberately misleading claims around products even if this is not the case.

As such, brands need to look for ways to validate natural claims, to ensure that consumers fully understand why claims are being made. This is especially important given that consumers are prone to checking nutritional labeling for such information. In 2019/2020, FMCG Gurus asked consumers want natural meant to them, when it comes to food and drink overall. The research shows that natural is a claim that can mean a variety of different things. Interestingly, consumers are most likely to say that natural formulation is associated with products being sugar-free. This indicates how consumers associate natural formulation as being free of ingredients deemed detrimental to health (even if the sugar in the product is natural). It also highlights some of the misconceptions that can exist when it comes to natural formulation.

What does the word 'natural' mean to you when it comes to food and drink?

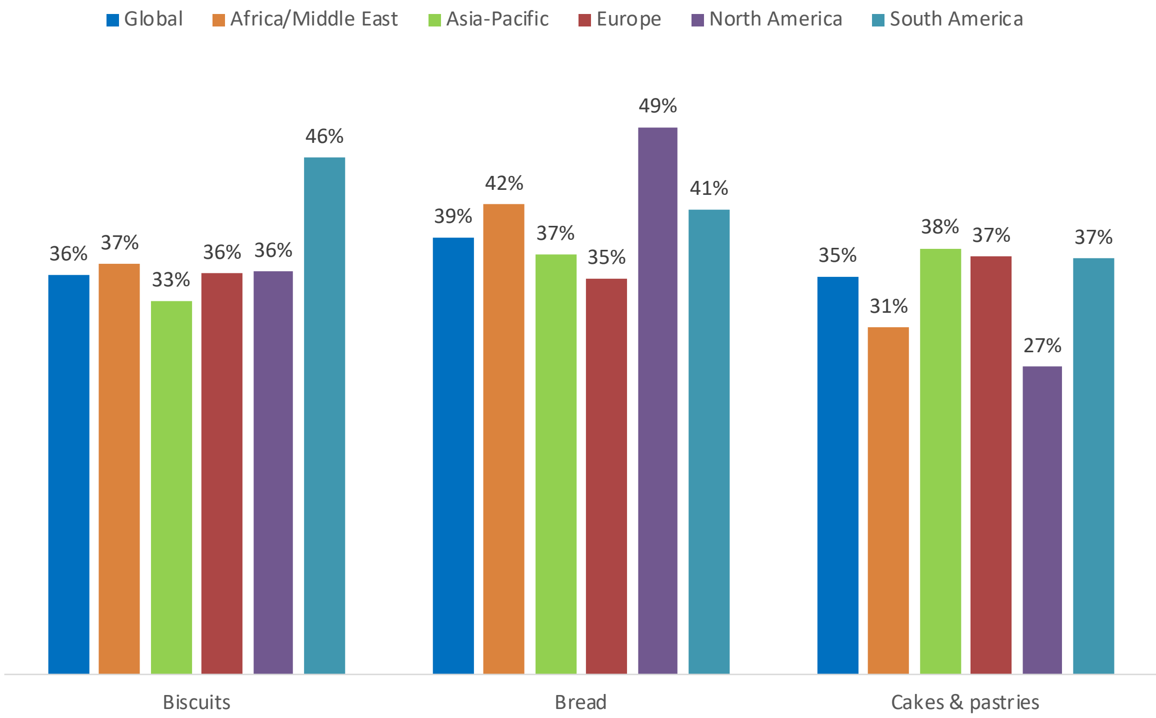
	Global	Africa/ME	Asia-Pacific	Europe	North America	South America
The use of 'real' ingredients	36%	42%	36%	34%	36%	35%
Product is minimally processed	35%	42%	28%	37%	38%	28%
Product is preservative-free	34%	57%	29%	32%	35%	28%
Product is allergen-free	19%	21%	21%	19%	12%	17%
Product is organic	43%	59%	48%	38%	33%	44%
Product is non-GMO	34%	40%	31%	36%	30%	16%
Product is free from synthetic ingredients	46%	55%	43%	46%	47%	31%
Product has plant-based ingredient	26%	44%	27%	22%	18%	25%
Product is environmentally-friendly	33%	50%	33%	31%	25%	21%
Product is healthier	44%	71%	37%	42%	46%	32%
Product is sugar-free	47%	66%	40%	46%	46%	37%
Product is low in sugar	23%	23%	25%	23%	19%	21%
Product contains no added sugar	39%	63%	37%	36%	29%	30%
Product contains natural colors	23%	25%	27%	23%	14%	28%
Product is free from artificial ingredients	23%	22%	27%	22%	17%	25%
Product is free from additives	39%	51%	35%	40%	39%	28%
Product is free from artificial colors	32%	43%	33%	30%	23%	35%
Product has a shortened ingredient list	43%	63%	36%	43%	37%	31%
Product contains recognized ingredients	18%	14%	18%	18%	24%	16%
Product has traceability/ingredients can be sourced	21%	27%	19%	20%	22%	21%

Source: Clean Label and Naturalness survey, Q1 2019/Q1 2020

Clean label claims will become even more important to consumers in a COVID-19 environment. This is because consumers are simultaneously purchasing more bakery products whilst also paying closer attention to natural claims. Indeed, research conducted by FMCG Gurus over the period April and May 2020 shows that consumers are increasing their purchasing of bakery products. This is because items such as bread is a staple part of diets and is an economical option at a time when consumers are trying to make their grocery spend go further. On the reverse of this, biscuits and cakes & pastries are seen small and affordable indulgences which offer moments of escapism.

At the same time, consumers have also placed more emphasis on seeking out natural products in 2020 in the wake of COVID-19. This is because food safety has become a major concern for consumers. As such, they want reassurance over food safety as well as wanting products that offer a nutritional boost. This means that for the foreseeable future, it will be important that bakery brands demonstrate natural credentials.

Proportion of consumers who say that they have purchased more of the following in the last month (April and May 2020 aggregated)



Source: COVID-19 survey, April 2020, and May 2020

Ingredient and label simplification are crucial when it comes to clean label bakery products

As mentioned already in this report, consumers can be skeptical towards claims made by brands, especially when it comes to health and wellness and natural claims. This is because consumers believe that brands can make misleading claims around natural formulation to charge a premium price. Moreover, this skepticism is something that tends to increase in times of uncertainty.

As such, the bakery industry needs to offer maximum transparency when it comes to natural claims, and this is something that can be done in two ways:

- **Ingredient streamlining.** Consumers can often feel the fewer ingredients in a product, the better. This is because such products are associated with containing only real and authentic ingredients and are not reliant on chemicals and additives or artificial coloring and flavoring. As such, brands should look to ensure that bakery products have fewer ingredients as possible. This includes enzymes in bakery products, which consumers can associate with having a detrimental impact on health. When it comes to ingredient streamlining, it is also important that ingredients are not made to sound chemical.

- **Simplified nutritional labeling.** Consumers want nutritional labeling to be as simple as possible so that they can make an informed decision about purchasing. At the same time, consumers can often feel that nutritional labeling is deliberately confusing to hide 'bad' ingredients used in product formulation. Again, this skepticism is likely to intensify in 2020 because of high levels of uncertainty. As such, it is important that brands look to make nutritional labeling as simple and transparent as possible. After all, consumers are accepting that products may not be the healthiest, especially as they believe that they can enjoy moments of indulgence as part of a balanced diet. However, they are less accepting of not being in control when it comes to determining how healthy a product is.

Proportion of consumers who want nutritional labeling to be as simplified as possible

Global	Africa/ME	Asia-Pacific	Europe	North America	South America
69%	90%	64%	64%	82%	69%

Source: Fresh Bakery survey Q4 2019 and Country Profile survey Q1 2019/Q1 2020

Proportion of consumers who deem it negative if bakery products contain the following

	Global	Africa/ME	Asia-Pacific	Europe	North America	South America
Enzymes	52%	46%	51%	53%	55%	49%
Preservative	51%	46%	46%	52%	62%	56%
Preservative enzymes	53%	52%	52%	53%	59%	55%
Amylase	54%	50%	56%	54%	44%	58%
Emulsifier	49%	51%	46%	49%	52%	48%
E471 emulsifier	51%	46%	51%	51%	59%	48%
E300 ascorbic acid	56%	55%	57%	57%	57%	52%

Source: Fresh Bakery survey Q4 2019 and Country Profile survey Q1 2019/Q1 2020

Consumers want bakery products that are high in protein

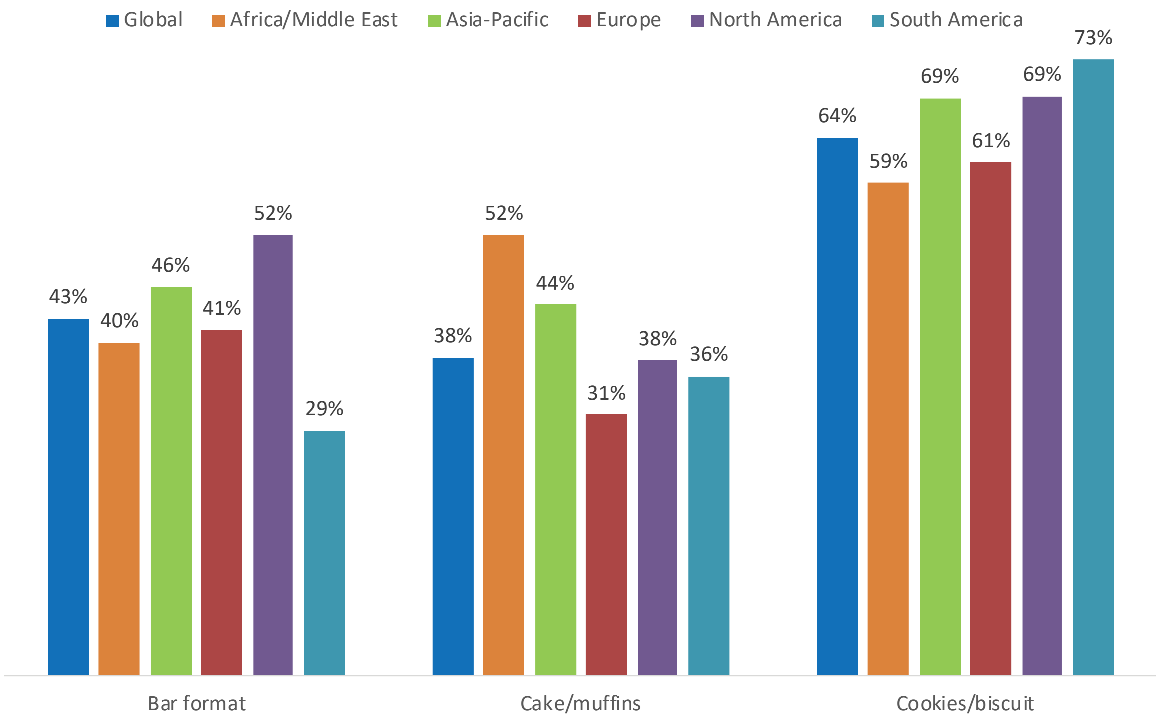
Sports nutrition products continue to grow in popularity in the bakery market

As consumers take a broader approach to health, they are re-evaluating what constitutes healthy eating. Indeed, consumers are no longer just focused on eliminating dietary evils from their culinary habits but instead, are trying to ensure that they maximize their nutritional intake. This is because consumers are looking to try and stay fit and active until as late as life as possible, whilst recognizing that their current dietary habits might not be the healthiest.

In Q3 2019, FMCG Gurus surveyed 26,000 consumers across twenty-six different countries and found that 47% of consumers said that they research different ingredients on a regular basis, showing how they are becoming more proactive to their health. Whilst consumers are paying high levels of attention to different ingredients within the bakery market, protein is an ingredient that continues to be of high importance. This is because consumers associate the ingredient with a variety of health claims and is one that they know and trust. Moreover, it is an ingredient that appeals to males and females.

The popularity of protein is a reason why sports nutrition products are becoming increasingly popular in the bakery industry, replacing traditional products that consumers snack and graze on. Often when it comes to protein, consumers are not overly familiar with how much they have had in the last twenty-four hours. However, it is an ingredient that consumers want to increase their intake of, even if this creates the risk of having too much protein in their diets. This is something that is driving demand for bakery products that are high in protein, either naturally or through enrichment.

Proportion of consumer who like to see high protein variants of the following



Source: Active Nutrition survey Q3 2019

When it comes to protein, it must be remembered that consumers often tend to have aspirational views towards the ingredient. This means that they are not overly aware of how much of the ingredient they should have in their diet or how much they currently intake. This means that it is also important not to over-estimate the level of importance that consumers attach to the volume, origin or source of protein when buying high protein bakery products. Instead, products having a 'high in' claim is enough to capture their attention and influence consumption habits because the product is associated with offering nutrition in a convenient manner, allowing consumption in certain product categories to be deemed guilt-free.

In addition to this, it is also important to understand that consumers do not turn to high protein products for specific health purposes but for general health and wellness purposes. This reflects why mainstream sports nutrition bakery products are not just popular amongst active gym goers who want products to address issues such as muscle health, but also everyday consumers who are simply re-evaluating their health and seeking out better-for-you options. This means that there are two issues that the bakery sector needs to consider:

- **Consumers need to be able to compensate for poor meal-time habits.** Across the globe, mealtimes are being skipped on a regular basis, especially in the morning and afternoon. Often consumers can turn to products such as high protein cookies and high protein bars to compensate for missed meals and to seek out benefits such as a nutritional and energy boost.

- **Products must be free-from compromise.** Consumers need to be able to incorporate products into their daily diets. This means it is important that high protein bakery products do not lack sensory appeal or create side effects.

What benefits do you associate with protein?

	Global	Africa/ME	Asia-Pacific	Europe	North America	South America
General health and wellness	57%	85%	65%	51%	67%	49%
Increases muscle mass	34%	43%	46%	27%	39%	32%
Helps with weight loss	30%	59%	30%	26%	44%	30%
Helps improve blood sugar levels	30%	68%	34%	24%	35%	32%
Helps improve brain health	23%	35%	30%	17%	25%	23%
Helps improve heart health	33%	75%	42%	26%	31%	31%
Helps improve bone health	21%	30%	26%	17%	29%	22%
Helps improve gut health	18%	25%	23%	14%	21%	18%
Helps improve energy levels	39%	59%	49%	33%	47%	36%
Improves mental wellbeing	20%	39%	26%	14%	25%	21%
Help me stay active as I age	40%	59%	52%	33%	47%	40%
Helps reduce signs of ageing	16%	36%	25%	11%	15%	16%

Source: Meat and Plant-Based Protein survey Q4 2018/Q3 2019

High protein bakery products need to compensate for skipped meals

Across the globe, meal-time habits are becoming more fragmented, with consumers missing meals on a regular basis, especially when it comes to morning and afternoon occasions. Often this is something that is attributed to a lack of time as consumers cram as many activities into the day as possible. At the same time, consumers are recognizing that skipped meals are having a direct impact on health and wellbeing.

Proportion of consumers who say that they skip breakfast at least two times in the average week

Global:	Africa/ME:	Asia-Pacific:	Europe:	North America:	South America:
24%	26%	18%	28%	21%	23%

Proportion of consumers who say that they skip lunch at least two times in the average week

Global:	Africa/ME:	Asia-Pacific:	Europe:	North America:	South America:
25%	32%	17%	27%	25%	29%

Proportion of consumers who say that they skip dinner at least two times in the average week

Global:	Africa/ME:	Asia-Pacific:	Europe:	North America:	South America:
16%	20%	13%	17%	16%	20%

Source: Snacking survey Q1 2019/ Q1 2020

As a result of this, consumers are re-evaluating their snacking habits, expecting snacks to offer a nutritional boost. This means that snacks are no longer seen as something that are an occasional treat where little-to-no attention is giving to nutritional value. Instead, consumers expect functional ingredients to help align with their health goals whilst also helping compensate for less structured mealtime occasions. In addition to this, consumers also expect bakery snacks to offer an energy boost.

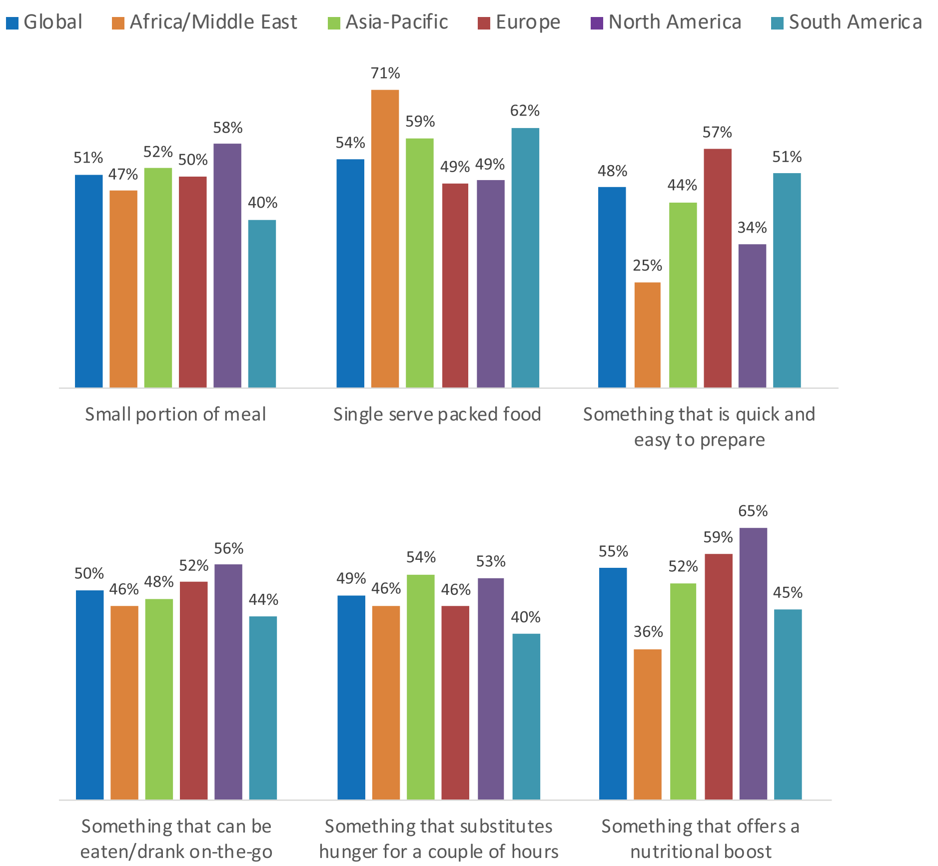
As already stated, consumers can often feel time scarce as they look to cram as many activities into the day as possible. Moreover, they can also struggle to switch off in the evenings, because of the daily worries that they have, something which impacts on relaxation levels. This is something that can result in consumers feeling tired and fatigued and seeking out products that offer a natural and sustained energy boost. This is something that the bakery snack market needs to capitalize, launching products that are high in functional ingredients, offer an energy boost and can act as a genuine meal substitute.

Proportion of consumers who say that in the last twelve months, they have directly changed from snacking on products such as chocolate and confectionery to snacking on high protein and/or low sugar products instead

Global:	Africa/ME:	Asia-Pacific:	Europe:	North America:	South America:
51%	50%	52%	51%	49%	56%

Source: Active Nutrition survey Q3 2019

What do you consider a snack to be?



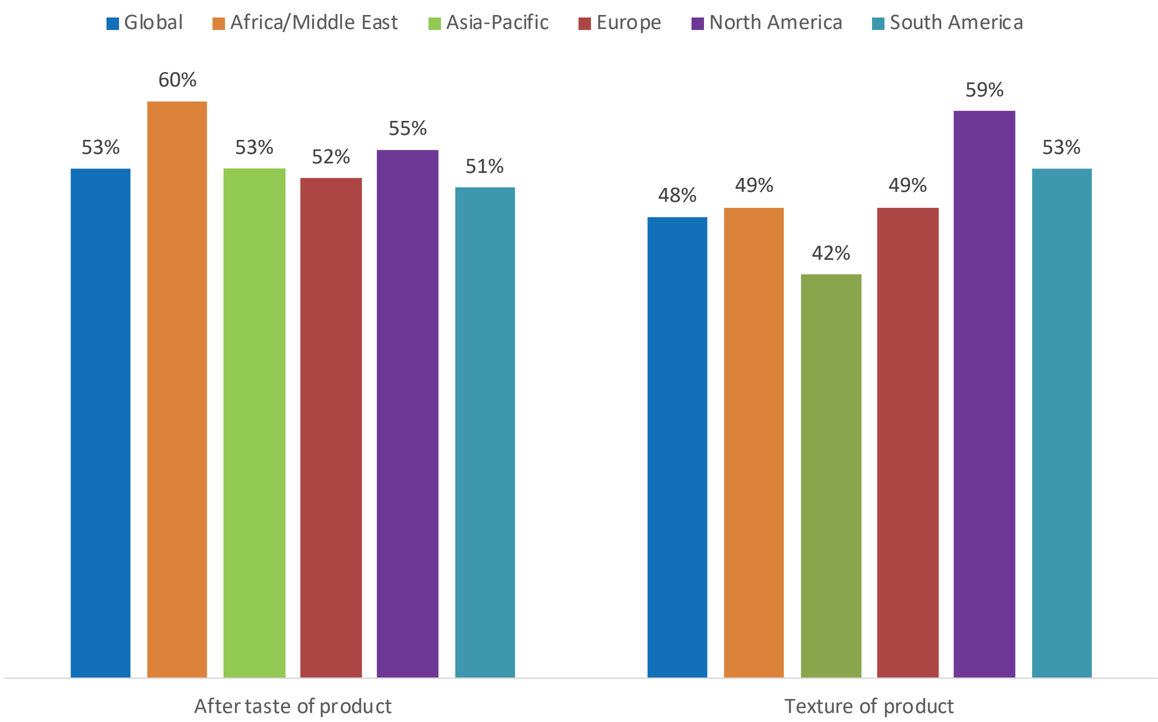
Source: Active Nutrition survey Q3 2019

High protein bakery products need to be deemed compromise-free

Whilst consumers have favorable perceptions of high protein bakery products, it is important to recognize that barriers to purchase can exist. Consumers want products that they can easily incorporate into their diets. This means that products must be seen as affordable and suitable for on-the-go. As mentioned earlier, it is important not to over-estimate the extent that consumers evaluate the quality, source and volume of protein used in products. Instead, they are more likely to pay attention to taste and texture, as sensory appeal is important when it comes to snacking occasions. In addition to this, it is important that products are not seen to create any side-effects.

FMCG Gurus research shows that across the globe, a high proportion of consumers demonstrate concerns when it comes to the taste and texture of high protein snacks such as cookies, bars, and other bakery type products. This is because such products can often be associated with a bitter aftertaste. This is something that will impact on consumer willingness to purchase on products on the long-term, as they will be reluctant to trade-off between taste and nutrition.

Proportion of consumers who say that they are concerned about the following when it comes to high protein snacks



Source: Active Nutrition survey Q3 2019

In addition to this, a significant proportion of consumers also admit that they have suffered from side-effects when it comes to high protein snacks. This is potentially the result of consumers not actively monitoring their protein intake and inadvertently having too much of it in their diets. Nevertheless, consumption of such products has led to issues such as bowel problems amongst consumers which will lead to feelings of embarrassment, something that will impact on their reluctance to turn to such products in the long-term.

In a COVID-19 environment, it is also important to recognize that affordability is something that could also act as a barrier when it comes to high protein bakery products. This because such products can often be associated with a premium price point at a time when consumers are looking to cut back on spend on products to make their money go further. This is something that could result in consumers turning to everyday food and drink products for their nutritional intake or to act as a meal substitute compared to functional/fortified bakery products.

As such, as well as promoting the safety and sensory appeal of high protein bakery products, it is also important that they are deemed to be affordable and good value for money.

Proportion of consumers who say concerns about side-effects are an issue when it comes to high protein snacks

Global:	Africa/ME:	Asia-Pacific:	Europe:	North America:	South America:
20%	22%	18%	22%	20%	22%

Source: Active Nutrition survey Q3 2019

Sugar reduction is also a priority for consumers when it comes to bakery products

Consumers are conscious about weight gain

Irrespective of efforts made by consumers over the years to reverse the trend, the proportion of consumers who are classified as overweight or obese continues to rise. This means that plans to lose weight are not working. This in turn is something that intensifies the war on sugar amongst consumers because of the association with excessive intake and excessive waistlines and growing rates of diabetes. FMCG Gurus research shows that any time, around four in ten consumers say that they are on a diet in order to lose weigh.

Proportion of consumers who say that they are currently on a diet in order to lose weight

Global:	Africa/ME:	Asia-Pacific:	Europe:	North America:	South America:
39%	35%	44%	37%	45%	42%

Source: Country Profile survey Q1 2019/Q1 2020

When it comes to strategies taken to lose weight, consumers are especially likely to say that they are looking to reduce their intake of sugar.

How are you trying to lose weight?

Consumers who are currently trying to lose weight

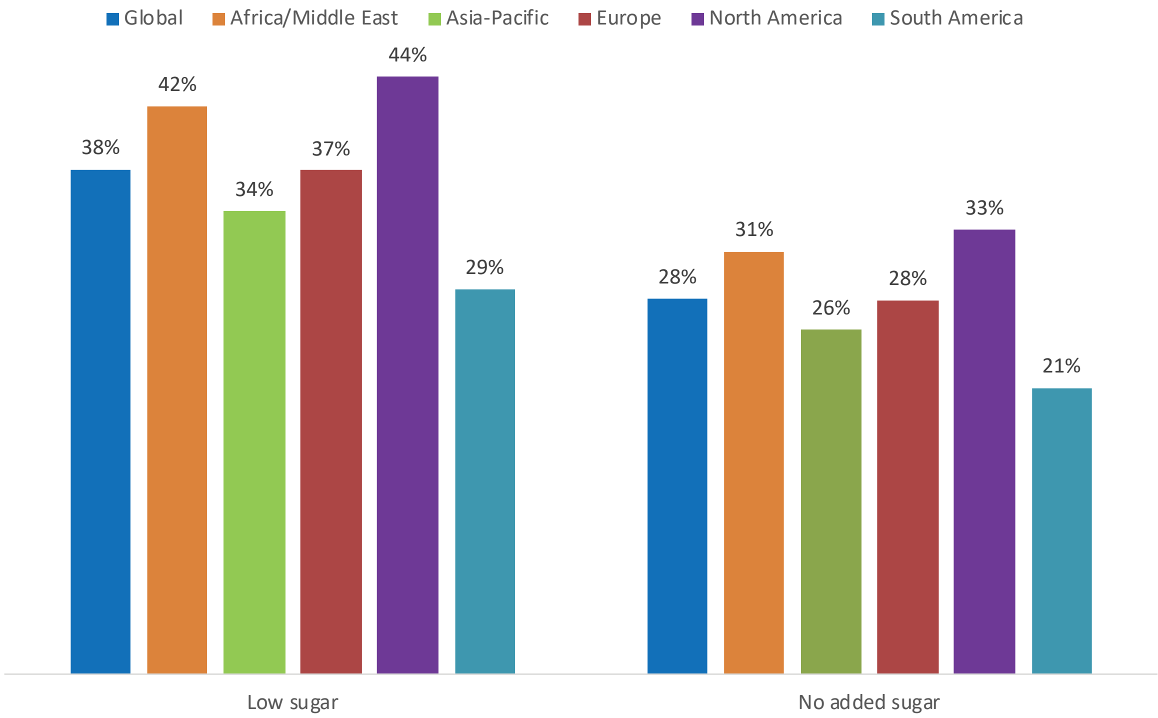
	Global	Africa/ME	Asia-Pacific	Europe	North America	South America
Cut out certain types of food and non-alcoholic drinks from my diet completely	28%	38%	27%	26%	28%	24%
Reduced portion sizes of the food and drink I consume	38%	44%	32%	38%	47%	27%
Cut down on/ abstained from alcohol	26%	33%	19%	28%	19%	22%
Cut down on/abstained from processed food	30%	44%	26%	29%	36%	19%
Exercised more	53%	60%	56%	51%	50%	50%
Tried a liquid diet/ a diet plan that promises instant results	10%	17%	11%	8%	6%	22%
Eaten more fresh food and vegetables	53%	61%	51%	53%	59%	43%
Looked to reduce consumption of sugar	52%	61%	51%	51%	50%	36%
Turn to food and drink that help me feel fuller for longer to curb hunger	20%	22%	24%	18%	20%	21%
Skipped meals/ eaten less meals throughout the day	25%	33%	30%	23%	11%	19%
Cut down on/ stopped snacking	40%	35%	44%	41%	35%	20%
Consumed a nutritional shake or beverage as part of a weight wellness plan	16%	22%	18%	13%	17%	30%
Eaten less food that is high in fat	33%	46%	30%	29%	42%	34%
Eaten more food that is high in fiber	29%	38%	31%	25%	34%	33%
Eaten more food that is high in protein	29%	35%	30%	26%	36%	27%
Increased healthy snacking	21%	21%	21%	18%	33%	21%
Other	3%	4%	3%	3%	2%	0%

Source: Country Profile survey series Q1 2019/Q1 2020

This is something that will drive demand for claims within the bakery sector for products that are either free-from sugar or low in sugar. This is because consumers want dietary plans to be compromise-free, meaning they will seek out better-for-you alternatives as opposed to reducing portion size or looking to abstain from products completely. Indeed, FMCG Gurus research conducted over the period Q1 2019/Q1 2020 shows that a significant proportion of consumers across the globe say that low sugar claims are important when it comes to bakery products.

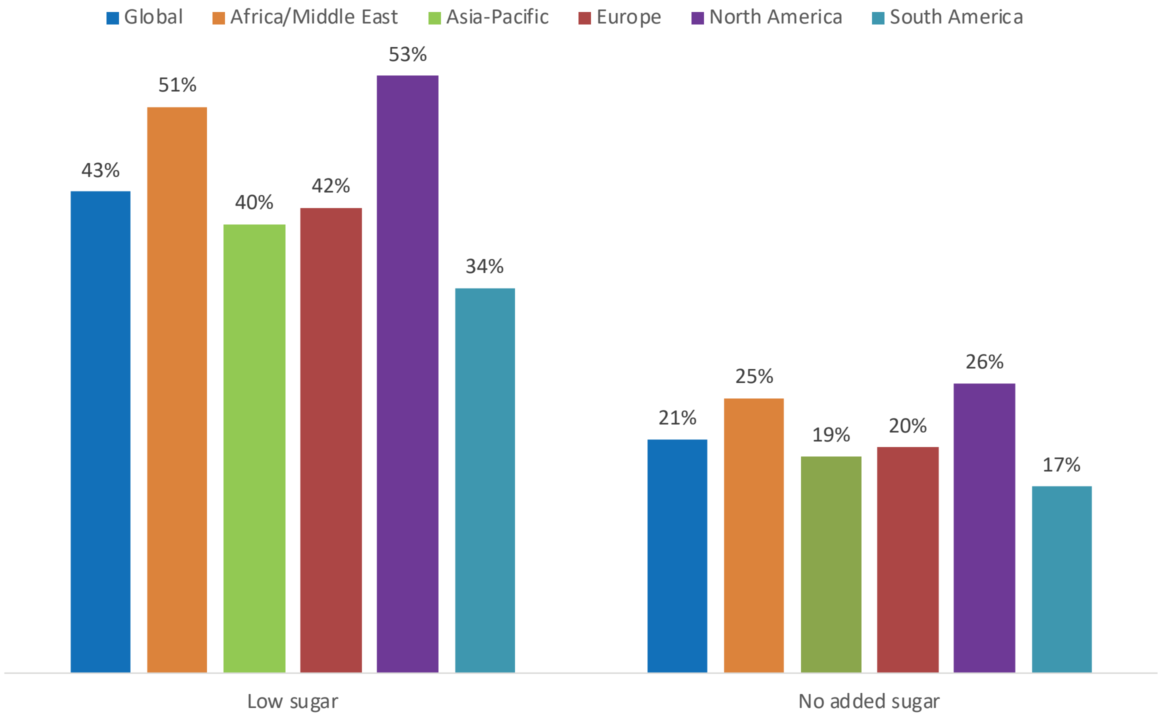
This is because reduced/free-from sugar claims are associated with allowing consumers to enjoy moments of indulgence in a guilt-free manner.

Proportion of consumers who say the following claims are important in the bread category



Source: Country Profile survey Q1 2019/Q1 2020

Proportion of consumers who say the following claims are important in the baked goods category



Source: Country Profile survey Q1 2019/Q1 2020

Irrespective of weight management goals, consumers are not willing to compromise on moments of indulgence

However as mentioned earlier, a high proportion of dietary plans fail. One of the reasons for this is that diets are often associated with compromise, meaning consumers are reluctant to keep to such plans in the long-term. This is because irrespective of efforts made by the industry to try and convince consumers otherwise, healthier food is associated with being bland and boring and consumers are reluctant to trade-off on this. This is something that is true in the bakery industry as high sugar is associated with superior taste, something that consumers are unwilling to compromise on. As such, it is important that any better-for-you products are not associated with being inferior in taste. This is a key reason why consumers do not actively seek out natural sweeteners and stevia in the bakery sector, despite the associations with these ingredients being a healthier alternative to sugar.

As highlighted in the previous chapter, when it comes to ingredients in the bakery sector, consumers are unwilling to trade-off on indulgence. This is true not only for high protein offerings, but also for sugar substitutes. FMCG Gurus research conducted over the period Q1 2019/Q1 2020 shows that a considerable proportion of consumers associate the ingredient stevia with inferior taste.

Proportion of consumers who say that they associate the ingredient stevia with an inferior taste

Global:	Africa/ME:	Asia-Pacific:	Europe:	North America:	South America:
24%	22%	29%	23%	16%	23%

Source: Country Profile survey Q1 2019/Q1 2020

The importance of the bakery sector offering products that assist with weight management goals whilst also being deemed compromise-free will increase in importance in 2020 and beyond, due to COVID-19. As highlighted earlier, consumers are increasing their intake of products that offer small indulgences, such as biscuits and cakes. This is something that is being done for escapism purposes. However, at the same time, consumers admit that this is something that they believe is having a positive impact on their waistlines.

FMCG Gurus research conducted in May 2020 shows that 51% of consumers across the globe say that they believe that COVID-19 will continue to impact on their daily lives for at least twelve months. This means that they will continue to seek out products that they believe are natural, high in good ingredients like protein and low in bad ingredients such as sugar. This is something that the bakery industry needs to respond to, using protein and low sugar claims to promote traits such as satiety-enhancing benefits and energy boosts, something that may help eliminate some of the compromise and sacrifice that is associated with better-for-you options.

At the same time, it is important that the industry addresses the issue of taste when it comes to better-for-you options that help facilitate weight loss goals. This means that any high protein products positioned around satiety-enhancing are not deemed to have a bitter after taste. In addition, it is important that any alternative sweeteners used instead of sugar are not seen to also impact on the sensory appeal of bakery products.

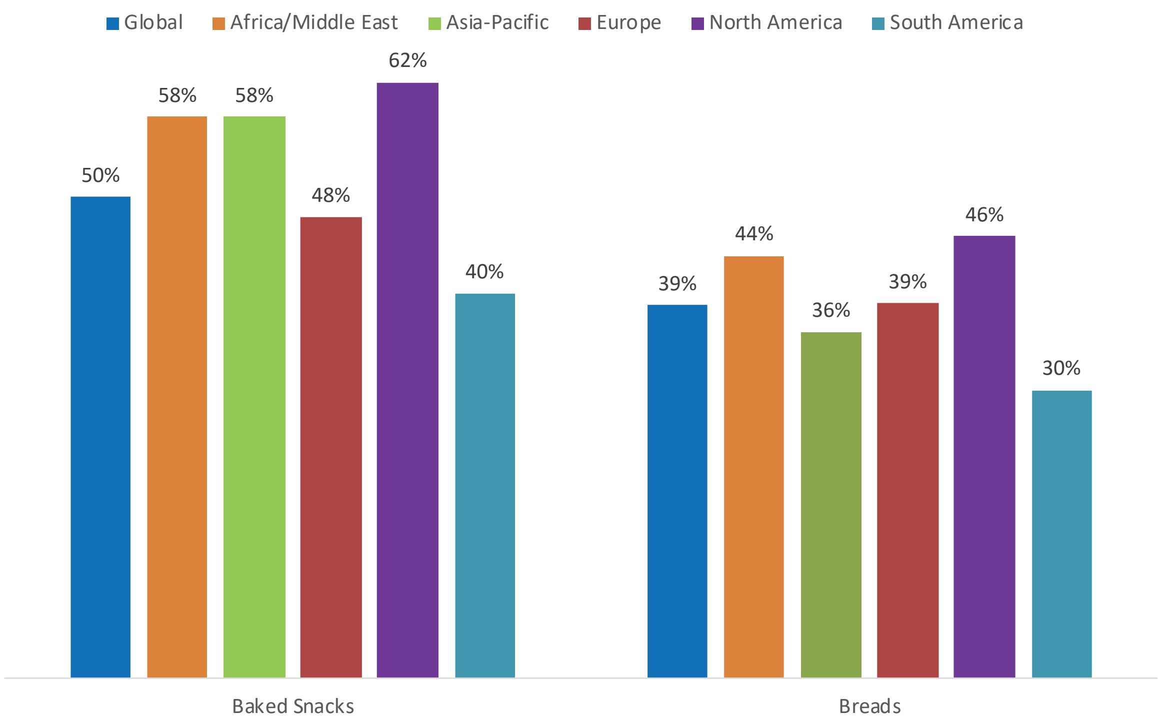
The bakery industry needs to respond to consumers becoming more environmentally minded

Ethical consumers are switching their diets to lead a more environmentally friendly lifestyle

For several decades, the environment has been being at something of a tipping point in the eyes of the consumer. In Q3 2019, FMCG Gurus surveyed 26,000 consumers across twenty-six countries. The research found that 63% of consumers said that they were concerned about the state of the environment, with 48% somewhat pessimistically stating that they believe damage done is irreversible. When it comes to environmental concerns, the main worries that consumers have are animal species going extinct (56%) and deforestation (55%).

As stated earlier on in the report, consumers are adopting the notion of Good for Me, Good for the Earth. This means that consumers recognize that the issues of health and sustainability are interlinked. As such, if consumers are concerned about the state of the environment, they will also believe that this is something that will impact on the quality of life for themselves and future generations. As such, consumers believe it is important that bakery products carry sustainability claims.

Proportion of consumers who say that sustainability claims are important in the following categories



Source: Country Profile survey series, Q1 2019/Q1 2020

Historically, protecting the environment has been seen as more the responsibility of big businesses as opposed to the individual. However, in recent years, consumers have deemed it important that a more collective approach is taken to protecting the environment. As a result of this, consumers are looking to make changes to their dietary habits in order to lead a more sustainable lifestyle, with 45% of consumers saying that they have done this over the last two years, 2019 research by FMCG Gurus research.

Proportion of consumers who say that they have changed their diets in the last two years in order to lead a more environmentally-friendly lifestyle

Global	Africa/ME	Asia-Pacific	Europe	North America	South America
45%	65%	47%	38%	36%	57%

Source: Sustainability survey Q3 2019

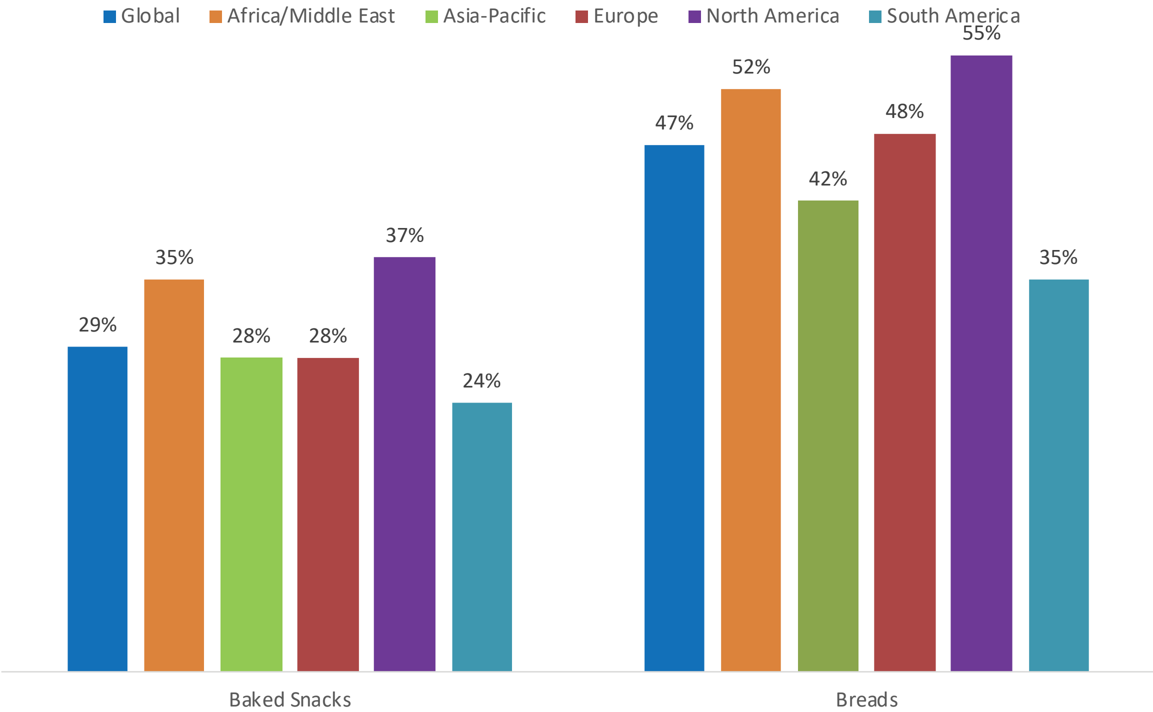
What steps have you taken?
Consumers who have made changes to their diets

	Global	Africa/ME	Asia-Pacific	Europe	North America	South America
Reduced/eliminated eating meat	33%	29%	33%	35%	31%	29%
Reduced/eliminated eating/drinking dairy	42%	41%	38%	48%	37%	38%
Reduced/eliminated eating fish	14%	15%	13%	13%	16%	15%
Followed a vegetarian diet	22%	27%	22%	19%	28%	21%
Followed a vegan diet	10%	14%	10%	10%	10%	10%
Turned to more local food and drink	46%	47%	44%	47%	54%	38%
Made greater attempts to reduce food waste	48%	28%	42%	57%	53%	41%
Eaten less processed food	22%	37%	23%	18%	23%	14%
Eaten more fresh food and drink	42%	39%	36%	43%	54%	45%
Made greater attempts to check out the environmental credentials of products before buying	30%	28%	28%	31%	46%	21%
Other	9%	7%	10%	9%	8%	8%

Source: Sustainability survey Q3 2019

Consumers have taken several steps to try and reduce their impact on the environment, with the actions most likely taken to be to try and reduce food waste and to turn to more local food and drink. This is something that will increase the importance of locality claims within the bakery sector, despite such claims already being of high appeal to consumers. Moreover, it is something that also creates the opportunity for initiatives around packaging that helps extend the shelf life of bakery products to reduce the risk of products being thrown away unnecessarily.

Proportion of consumers who say that locality claims are important in the following categories



Source: Country Profile survey series, Q1 2019/Q1 2020

In 2020, the importance of sustainability and locality claims will intensify in the bakery sector for the following reasons

- Consumers have a renewed sense of optimism that natural resources can be replenished as they have witnessed this happen because of restrictions on movement. As such, consumers will be more inclined to feel that damage done to the environment is reversable. Moreover, they will also expect brands to take the lead when it comes to addressing the environment from a finance and resource perspective.

- In times of uncertainty, consumers can demonstrate ethnocentric attitudes. This means that they tend to demonstrate favorable perceptions of products from their home country and show less trust towards products from foreign countries. This, combined with increased concern about food safety, means that consumers will want products that they believe have reduced supply chains because such products are deemed to be safer and healthier. In addition to this, consumers will also believe it is important to support local suppliers and farmers in a recessionary environment.

- COVID-19 has resulted in consumers becoming more concerned about their health and wellness and their vulnerability to disease and illness. This will make consumers conscious about their eating habits, especially as most consumers across the globe believe that a second wave of the disease is inevitable. Given that consumers believe that health and the environment are interlinked, they will place greater emphasis on protecting the environment than ever before.

- As highlighted earlier on in the report, consumers want products that they believe to be 100% natural and locality and sustainability claims are synonymous with natural formulation for some. As such, locality and sustainability claims can be used as a form of story-based marketing to add authenticity when it comes to natural claims.

Something already mentioned in this report, in times of uncertainty, consumers can become increasingly skeptical of claims made by brands and manufacturers. This is especially true when it comes to claims around locality and sustainability because of the subjectivity surrounding these claims. As well, consumers have also been exposed to high profile cases where brands have made claims around these two areas of formulation that have later proven to be misleading.

As such, when bakery brands make claims around such locality and environmental initiatives, it is crucial that they look to validate such claims so that they are more than marketing spiel in the eyes of the consumer. One way in this can done is through becoming early adopters of blockchain technology so that information on activities along the whole of the supply chain can be communicated in a transparent manner.

Plant-based claim is something that will appeal to consumers in the bakery industry for health and sustainability purposes

As highlighted earlier on in this chapter, consumers are taking several steps to try and lead a more environmentally friendly lifestyle. One way in which this is being done is to reduce intake of animal produce such as meat and dairy. As well as the sustainability benefits of this, such eating habits are associated with being healthier and in the case of meat, more economical. FMCG Gurus research conducted over the period Q4 2018/2019 shows that across the globe, a considerable proportion of consumers are following vegan, vegetarian, and flexitarian diets. This is something that is of high importance to bakery brands when it comes to new product development, as consumers will want to see claims to show that products are suitable for such dietary habits. This will be especially important when it comes to bakery products that are fortified with protein from animal sources.

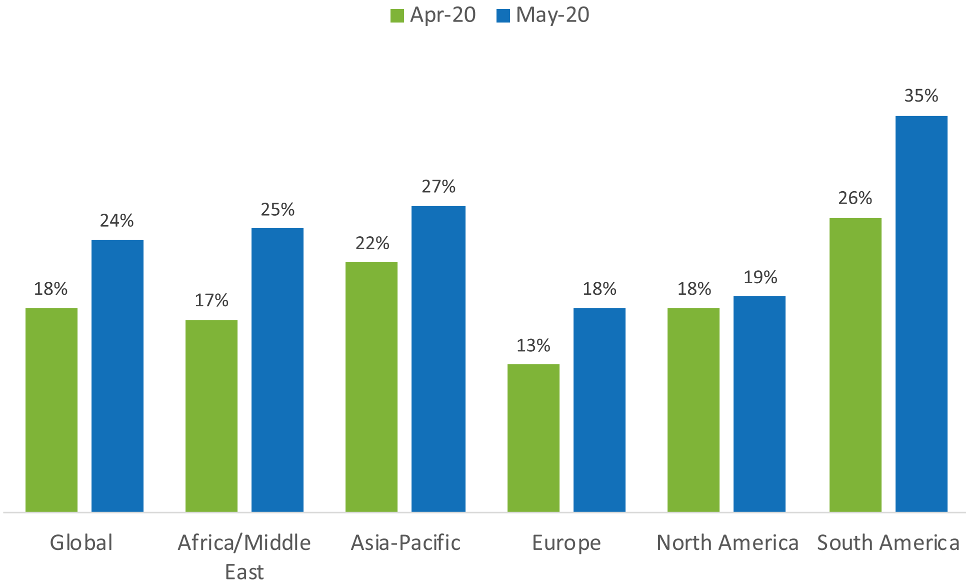
What type of diet are you following?

	Global	Africa/ME	Asia-Pacific	Europe	North America	South America
Regular meat eater	60%	48%	53%	63%	62%	59%
Pescatarian	5%	5%	3%	5%	4%	6%
Vegetarian	8%	17%	8%	7%	7%	8%
Vegan	3%	6%	3%	3%	4%	5%
Flexitarian	25%	25%	34%	22%	24%	22%

Source: Meat and Plant-Based survey, Q4 2018/Q3 2019

In 2020 and beyond, the importance of plant-based claims that are suitable for people following vegan, vegetarian, and flexitarian diets will increase because of COVID-19. This is something that the bakery industry needs to consider, due to consumers wanting to improve their health and lead a more environmentally friendly lifestyle.

Proportion of consumers who say that they plan to eat more plant-based foods due to COVID-19



Source: COVID-19 survey series, April 2020 and May 2020

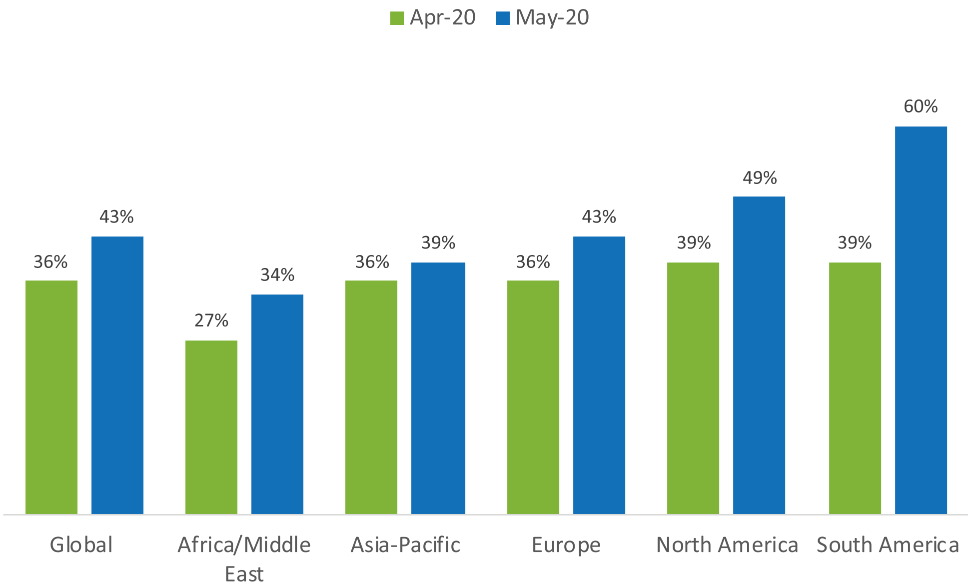
Comfort and escapism will be of high importance to consumers in a COVID-19 environment

Consumers will turn to bakery products for moments of escapism from daily pressures

This report has focused on how health and wellness and wider product traits associated with this will significantly impact the bakery industry in 2020 and beyond, especially in a pandemic and recessionary environment. However, whilst that is true, it is important to remember what the primary reason is that consumers turn to bakery products: taste and enjoyment. This is something that consumers are reluctant to trade off on, especially as they seek out moments of escapism from the pressures of daily life.

Prior to the pandemic, the frantic nature of modern life was already something that could prove overwhelming for consumers. For instance, consumers often feel time scarce as they look to cram as many activities into the day as possible, both personally and professionally. Moreover, consumers felt that daily worries such as the ability to handle daily living costs, work pressures and the health and wellness of loved ones mean that they often struggled to switch off and relax. For instance, research conducted by FMCG Gurus over the period Q4 2018/ Q3 2019 found that 57% of consumers said that they regularly suffer from feelings of stress, whilst 53% said that unfavorable sleeping habits were common. As a result of COVID-19, these feelings of stress and uncertainty will intensify. For instance, over the period April 2020 and May 2020, FMCG Gurus research shows that there has been a significant increase in the proportion of consumers saying that they have become more conscious about their mental wellbeing.

Proportion of consumers who say that they have become more conscious about their mental wellbeing as a result of COVID-19



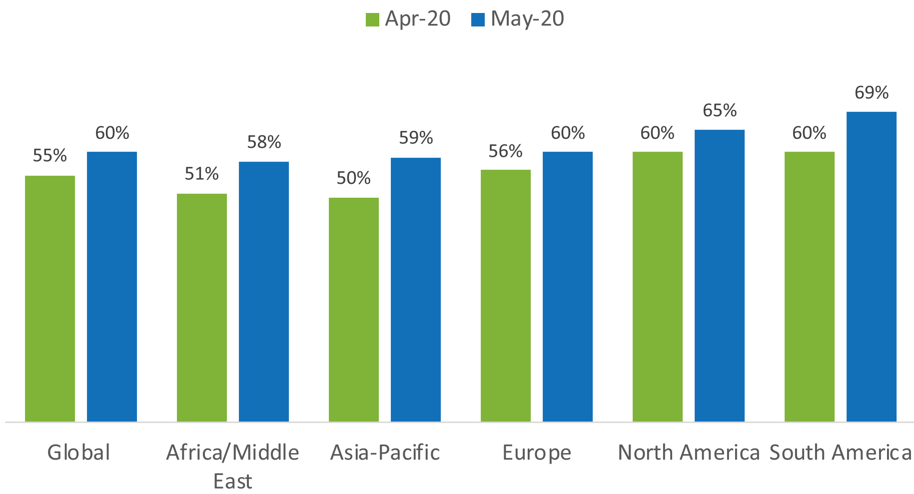
Source: COVID-19 survey series, April 2020 and May 2020

As consumers face high levels of uncertainty, they will turn to food products for moments of escapism from daily pressures. This is something that the bakery industry can capitalize on, positioning products as something that can offer moments of escapism and that can enhance mood. Additionally, these products should be positioned around helping consumers enjoy a moment of small and sustained moment of indulgence. Consumers will especially like these products if they are positioned around encouraging them to make the time in their frantic days to take a break as opposed to helping facilitate busy lives.

Something highlighted earlier on in this report, these moments of small indulgence are something that can often create feelings of guilt post consumption. This is because such moments of escapism are something that can conflict with long-term health goals. As such, bakery brands need to look for ways to make products appear guilt-free in the eyes of the consumer. One way of doing this is through clean label style positioning, promoting the use of natural and real and authentic ingredients that offer taste and nutrition at the same time and without the trade-off. This will appeal to consumers who are turning to bakery products for moments of comfort. Given that consumers feel that COVID-19 will continue to impact their lives for at least twelve months, it is something that will be especially important for consumers from a positioning perspective.

A sub-trend linked to this and something that the bakery industry must be aware of, in times of uncertainty, consumers can seek out products that remind of the past and simpler times. This is something that will drive the opportunity for nostalgic launches within the bakery sector which offer moments of comfort from daily pressures. These products are something that can elicit an emotional reaction from consumers, something that can encourage impulse buying and reduce levels of price sensitivity. This will be especially important in product categories such as cakes and biscuits that are associated with moments of indulgence. As well as launching nostalgic and retro products, the bakery industry can also use comfort-orientated marketing literature to capture consumer attention, such as reminding people of home-made cooking and other similar memories from the past.

Proportion of consumers who have sought out mood-boosting foods more frequently in the last month due to COVID-19



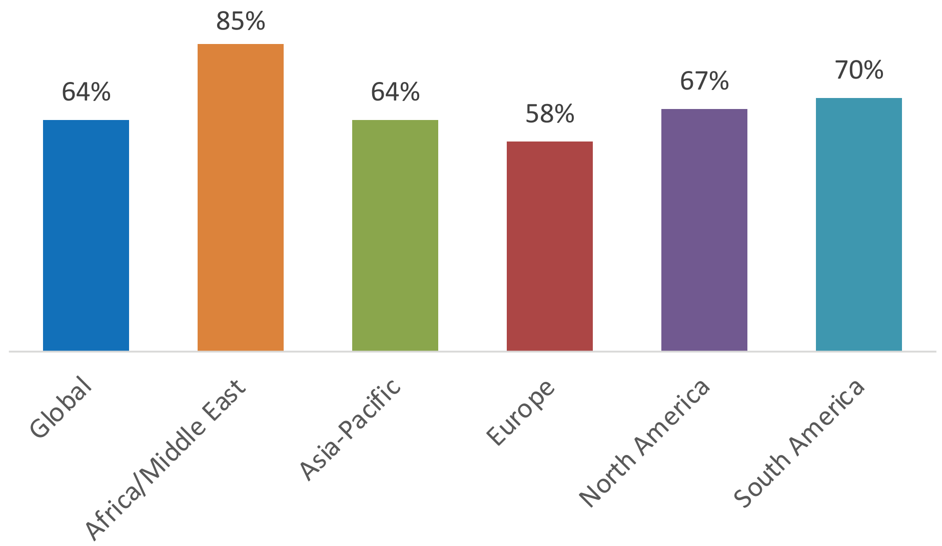
Source: COVID-19 survey series April and May 2020

Opportunities exist when it comes to ingredients that aid relaxation

Consumers are taking the time to research different ingredients that they feel will boost their health and wellbeing. At the same time, they are also adopting a more holistic approach to health. This means that consumers recognize that all aspects of health are interlinked and should not be treated in isolation. Central to this, consumers are recognizing the importance of mental wellbeing and recognizing that this can influence health beyond simplify influencing mood, such as influencing the immune system. At a time when consumers are suffering from stress and disrupted sleep patterns and face a period of sustained uncertainty, they will turn to products that help address their mental wellbeing. This is something that will create an opportunity for ingredients such as botanicals and CBD in the bakery market.

FMCG Gurus research conducted in Q1 2019/Q1 2020 for instances, shows that a high proportion of consumers are interested in products that aid relaxation and help them de-stress. This is something that the bakery market needs to capitalize on through product formulation. When it comes to promoting ingredients with health benefit it is crucial that consumers deem such ingredients to be safe and effective.

Proportion of consumers who say that they are interested in products that help alleviate stress



Source: Country Profile survey Q1 2019/Q1 2020

In recent years, consumers have become more aware and more accepting of the ingredient CBD. In Q3 2019, FMCG Gurus surveyed twenty-six thousand consumers across twenty-six countries. The research found that currently, CBD is something of a niche market, with fewer than one in ten consumers saying that they use such products. However, when given a definition around the ingredient, 40% of global consumers said that they would be willing to use it. When questioned why they would use the ingredient, the most popular answers given were to help with anxiety and sleep-related problems. There was also willingness to seek out everyday food products that contain the ingredient.

This further reflects how consumers are struggling with their mental wellbeing and are seeking out ingredients that can help address such issues. This is something that creates an opportunity for fortification within the bakery industry to target these consumers. When doing so it is important to offer reassurance around the safety of such ingredients and how to minimize the risk of side effects.

Proportion of consumers who say that they would be willing to use products that contain CBD

Global:	Africa/ME:	Asia-Pacific:	Europe:	North America:	South America:
40%	39%	37%	37%%	48%	50%

Source: CBD survey, Q3 2019

Conclusions

Natural claims will continue to be of high importance to consumers when it comes to bakery products. However, consumers will want more validation around such claims than ever before. Brands can look to do this through using technology such as blockchain to offer maximum transparency around such claims. Where possible, brands should also link natural claims with sustainability and locality claims.

Consumers are paying greater attention to ingredients used in product formulation than ever before. Related to this, consumers want reassurance that ingredients used in bakery products are real and authentic and are free from chemicals and artificial ingredients that are detrimental to their health. The industry can look to respond to this through streamlining ingredients and ensuring nutritional labeling is as simple to understand as possible.

When it comes to offer consumers reassurance around the use of natural formulation, story-based marketing is something that can help assist this through offering consumers authenticity. Indeed, brands can refer to the origin and heritage of the brand, how ingredients are sourced and to craft production techniques. This is something that also offers reassurance that maximum care and attention has gone into the product.

As consumers become more health conscious, they will continue to place a high level of interest in high protein offerings. This is something that the bakery industry needs to capitalize on through natural and fortified offerings. It must be remembered however, that high protein products are being turned to by everyday consumers who are seeking out better-for-you solutions in a hassle-free manner. This means it is important that products are not seen to be lacking in sensory appeal or can cause side effects.

High protein bakery offerings are also something that can be targeted at evolving mealtime habits across the globe. Consumers are skipping meals more frequently and are looking to snacks to help compensate this. As such, high protein bakery products and snacks need to be nutritious, satiety-enhancing and energy boosting. These are key claims that should be on the forefront of packaging.

Consumers will also continue to be conscious about the sugar content of bakery products. However, it is important not to overestimate the extent that they are switching to products that have alternative sweeteners to sugar, such as stevia. This is because consumers can associate alternative sweeteners with inferior taste. When it comes to targeting the weight management market, it is important that taste is not compromised, and the industry needs to find natural sweeteners that align with this need state.

Guilt-free will be an important message in the bakery industry in 2020 and beyond. This is because consumers are simultaneously becoming more health conscious whilst also snacking more for escapism purposes. This means that they will want products that offer taste and nutrition at the same time. Rather than focusing purely on messages around reduced sugar and calories, this further reflects the importance of promoting real and authentic and functional ingredients.

The bakery industry also needs to respond to the growing proportion of consumers who are following vegan, vegetarian, and flexitarian diets. This is something that will drive demand for plant-based and animal-free claims in the bakery market. When it comes to such products, it is important that brands are not seen to be making misleading claims regarding how natural and sustainable these products are.

Consumers will also put greater emphasis on locality claims within the bakery industry in 2020 and beyond. This is because consumers want products with reduced supply chains and deem local suppliers to be safer, better quality, more trustworthy, more environmentally friendly, and healthier. Given that phrases like sustainability and locality are something that are subjective in nature, it is important that brands look to validate such claims.

Whilst much attention has been given to health and wider claims related to health, it is important to remember that enjoyment and indulgence are important motivations when seeking out bakery products. This is especially true in a COVID-19 environment, where consumers are looking to seek out moments of escapism from the pressures of everyday life. As such, bakery products should be positioned around offering moments of small indulgence and helping alleviate daily pressures.

Linked to this, comfort-orientated marketing within the bakery market is also something that will appeal to consumers in times of uncertainty. This means that there is an opportunity to launch nostalgic and retro products that remind consumers of the past and simpler times. It also creates the opportunity for comfort-orientated marketing literature and packaging designs with the industry, such as products helping consumers reminisce about home cooking.

Consumers are struggling with their mental wellbeing and are seeking out ingredients that can help address stress and fatigue, that creates an opportunity for fortification with botanical ingredients in the bakery sector. Such products will appeal to consumers who are educating themselves about different ingredients and are looking to combat stress and sleep health-related issues. However, when it comes to launching such products, it is important that brands offer reassurance about the safety of such products and help consumers minimize the risk of side effects.

Appendix

FMCG Gurus used the following survey series for this report:

- Country Profile survey series (conducted Q1 2019/Q1 2020) – 43,000 respondents – 43 countries
- Clean Label and Naturalness survey series (Conducted Q1 2019/Q1 2020) – 43,000 respondents – 43 countries
- Snacking survey series (conducted Q1 2019/Q1 2020) – 43,000 respondents – 43 countries
- Fresh Bakery survey series (conducted Q4 2019) – 46,000 respondents – 40 countries
- Active Nutrition survey series (conducted Q3 2019) – 26,000 respondents – 26, countries
- Sustainability survey series (conducted Q3 2019) – 26,000 respondents – 26, countries
- CBD survey series (conducted Q3 2019) – 25,000 respondents – 25, countries
- Meat and Plant-Based Protein survey series (conducted Q4 2018/Q3 2019) – 25,000 respondents – 25 countries
- COVID-19 survey series (conducted April and May 2020) – 46,000 respondents – 18 countries

Demographics

	Male	Female	18-24	25-34	35-44	45-54	45-64	65+
Country Profile	50%	50%	16%	21%	17%	16%	15%	17%
Clean Label and Naturalness	50%	50%	14%	21%	18%	17%	14%	16%
Snacking	50%	50%	15%	21%	17%	16%	15%	17%
Fresh Bakery	50%	50%	13%	21%	16%	16%	15%	19%
Active Nutrition	50%	50%	13%	17%	17%	17%	15%	22%
Sustainability	52%	48%	13%	17%	17%	17%	15%	21%
CBD	51%	49%	13%	17%	17%	17%	15%	21%
Meat and Plant-Based Protein	50%	50%	12%	20%	19%	17%	14%	18%
COVID-19	50%	50%	13%	21%	15%	16%	13%	21%

Countries

Country Profile	Clean Label and Naturalness	Snacking	Fresh Bakery	Active Nutrition	Sustainability	CBD	Meat and Plant-Based Protein	COVID-19
Argentina	Argentina	Argentina	Argentina	Argentina	Argentina	Argentina	Argentina	Australia
Australia	Australia	Australia	Australia	Australia	Australia	Australia	Australia	Brazil
Austria	Austria	Austria	Austria	Brazil	Brazil	Brazil	Austria	Canada
Belgium	Belgium	Belgium	Brazil	Canada	Canada	Canada	Brazil	China
Brazil	Brazil	Brazil	Canada	China	China	China	Canada	Denmark
Canada	Canada	Canada	Chile	Denmark	Denmark	Denmark	Chile	France
Chile	Chile	Chile	China	France	France	France	China	Germany
China	China	China	Colombia	Germany	Germany	Germany	Croatia	Italy
Colombia	Colombia	Colombia	Croatia	Indonesia	Indonesia	Indonesia	Denmark	Japan
Croatia	Croatia	Croatia	Czech Republic	Italy	Italy	Italy	France	Mexico
Czech Republic	Czech Republic	Czech Republic	Denmark	Japan	Japan	Japan	Germany	The Netherlands
Denmark	Denmark	Denmark	Egypt	Malaysia	Malaysia	Malaysia	Indonesia	Poland
Egypt	Egypt	Egypt	France	Mexico	Mexico	Mexico	Italy	South Africa
France	France	France	Germany	The Netherlands	The Netherlands	The Netherlands	Japan	South Korea
Germany	Germany	Germany	India	Nigeria	Nigeria	Nigeria	Malaysia	Turkey
Hungary	Hungary	Hungary	Indonesia	Poland	Poland	Poland	Mexico	UK
India	India	India	Italy	Saudi Arabia	Saudi Arabia	Serbia	The Netherlands	USA
Indonesia	Indonesia	Indonesia	Japan	Serbia	Serbia	Slovenia	Nigeria	Vietnam
Italy	Italy	Italy	Kenya	Slovenia	Slovenia	South Africa	Norway	
Japan	Japan	Japan	Malaysia	South Africa	South Africa	South Korea	Poland	
Kenya	Kenya	Kenya	Mexico	South Korea	South Korea	Spain	Saudi Arabia	
Malaysia	Malaysia	Malaysia	The Netherlands	Spain	Spain	Turkey	Slovenia	
Mexico	Mexico	Mexico	Nigeria	Turkey	Turkey	UK	South Korea	
The Netherlands	The Netherlands	The Netherlands	Poland	UK	UK	USA	Spain	
Nigeria	Nigeria	Nigeria	Portugal	USA	USA	Vietnam	Sweden	
Philippines	Philippines	Philippines	Romania	Vietnam	Vietnam		Turkey	
Poland	Poland	Poland	Russia				UAE	
Portugal	Portugal	Portugal	Saudi Arabia				UK	
Romania	Romania	Romania	Serbia				USA	
Russia	Russia	Russia	Slovakia				Vietnam	
Saudi Arabia	Saudi Arabia	Saudi Arabia	Slovenia					
Serbia	Serbia	Serbia	South Africa					
Slovakia	Slovakia	Slovakia	South Korea					
Slovenia	Slovenia	Slovenia	Spain					
South Africa	South Africa	South Africa	Sweden					
South Korea	South Korea	South Korea	Thailand					
Spain	Spain	Spain	Turkey					
Sweden	Sweden	Sweden	UK					
Thailand	Thailand	Thailand	USA					
Turkey	Turkey	Turkey	Vietnam					
UK	UK	UK						
USA	USA	USA						
Vietnam	Vietnam	Vietnam