

KANTAR

# Appetite for growth

How our demands  
change according  
to circumstances

Exclusive  
*Demand Moments for  
Consumption* report

May 2023



# Recipe for success: deeper understandings of our eating and drinking habits to unlock growth

## +2.5M

**F&D occasions at home over the world per year**

Rotative sample covering 52 weeks of the year

Online diary, single source to purchase panel

**UK, FR, ES, PT, BR, MX, CO**

**+ Upcoming countries GE, IT (2023)**

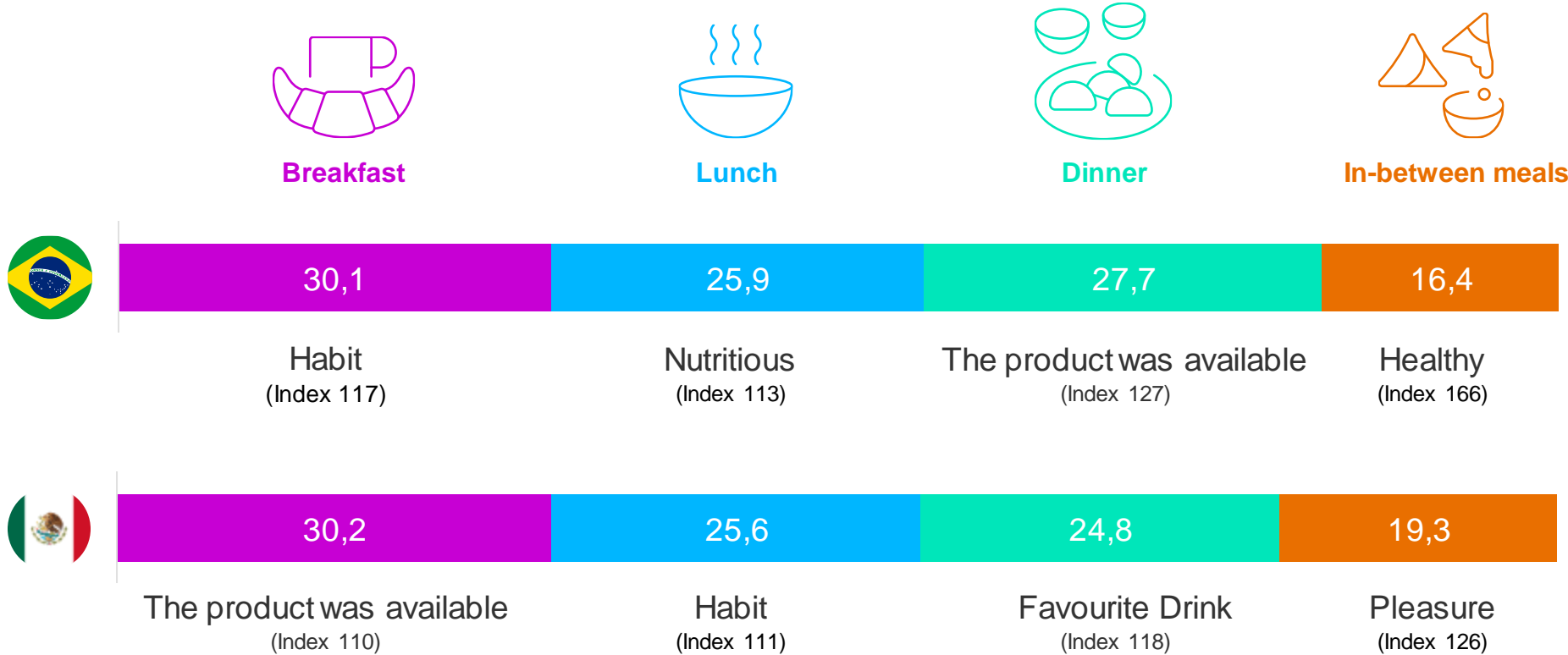
**+ UsageFlex platform available On Demand**



# Breakfast and lunch in similar proportions, but with different drivers

Snacking is a healthier choice in Brazil, while more indulgent in Mexico

Moments of consumption | % Occasions



# Adapting household consumption to an inflationary scenario



**Expandability**  
1 Kg of coffee moved from **12** to **16** servings in Brazil



**More reheating**  
Microwave occasions increased by **11%** in Mexico.



**Inflation impacting consumption**  
The basket with the highest price increase in the region lost about **5%** of all consumption occasions in BR.



**More sharing occasions**  
Occasions where more than 4 people are present are increasing, mainly among low SELs → **+4pp** vs. 2 years ago.

# Capitalise on clarity: the *Demand Moments* advantage

Introducing *Demand Moments* - the solution that seamlessly fuses context with consumers' core emotional and functional needs.

By condensing the complexity of the five W's (Who, What, When, Why, Where) into a single, behaviour-focused lens, *Demand Moments* reveal market opportunities.

They then uncover demand drivers and unexpected competition, so brands can unleash their full potential.

**Demand Moment for Consumption segmentation in 5 countries: UK, FR, ES, BR, MX**

**Period of analysis: MATQ3 2022**

**COL coming in 2023**

I have time to cook, and all the ingredients I need

Want to indulge – tense from the week's activities



**Cooked a recipe I liked**



Saturday mid-day meal, and everybody is home

Female, 30+, married, full-time job

# The big four: LatAm growth scenarios

Core growth territories are generated by the combination of these dimensions

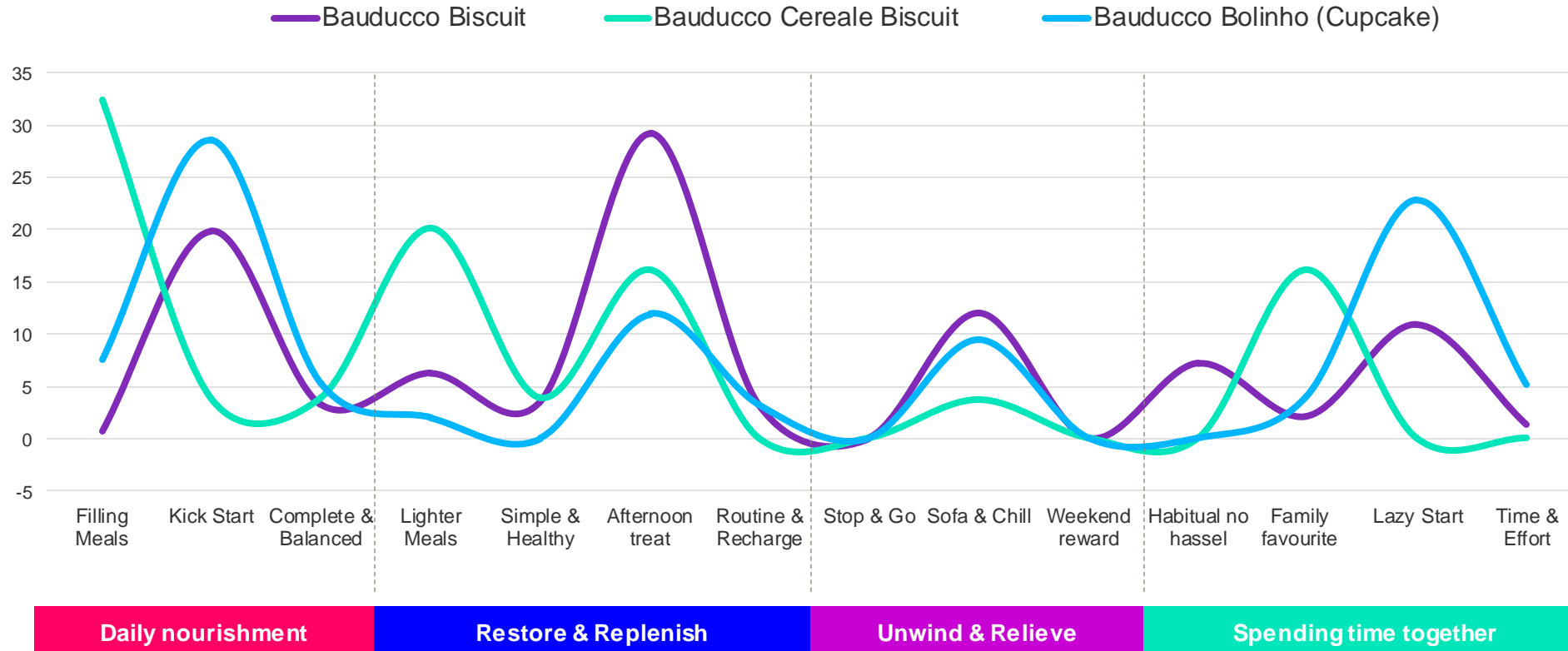
%Occasions



# Cereale and Bauducco Cake bring new territories to Bauducco, moving to “Daily Nourishment” and “Spending time together”



% Occasions



# Appetising advantage

Elevate your brand with unmatched insights into Eating and Drinking habits.  
Seamlessly integrate our demand moment framework for an instant competitive edge.

## Category Growth Map

Global Demand Moments Report

- 14 *Demand Moments* - Size & Profile
- Top categories per *Demand Moment*
- Cross- country harmonised reports

## Portfolio Stretch

Range of flavours/variants to grow share of stomach

- Wider addressable market
- Category product hierarchy
  - Top segments & brands
  - Sub Brand, pack/size

## Always On tool

Support **every** business process and work stream

- X-Filter dimension
- Quarterly refresh
- Link to Source of Purchase

**Consumers are moving fast, so should you!**



# Feast your eyes on more unmissable insights

Coming soon

Mind the gap:  
How Consumption differs between generations in LatAm  
Summer 2023

Seeking balance:  
Indulgence vs. Health in LatAm  
Autumn 2023

# THANK YOU

