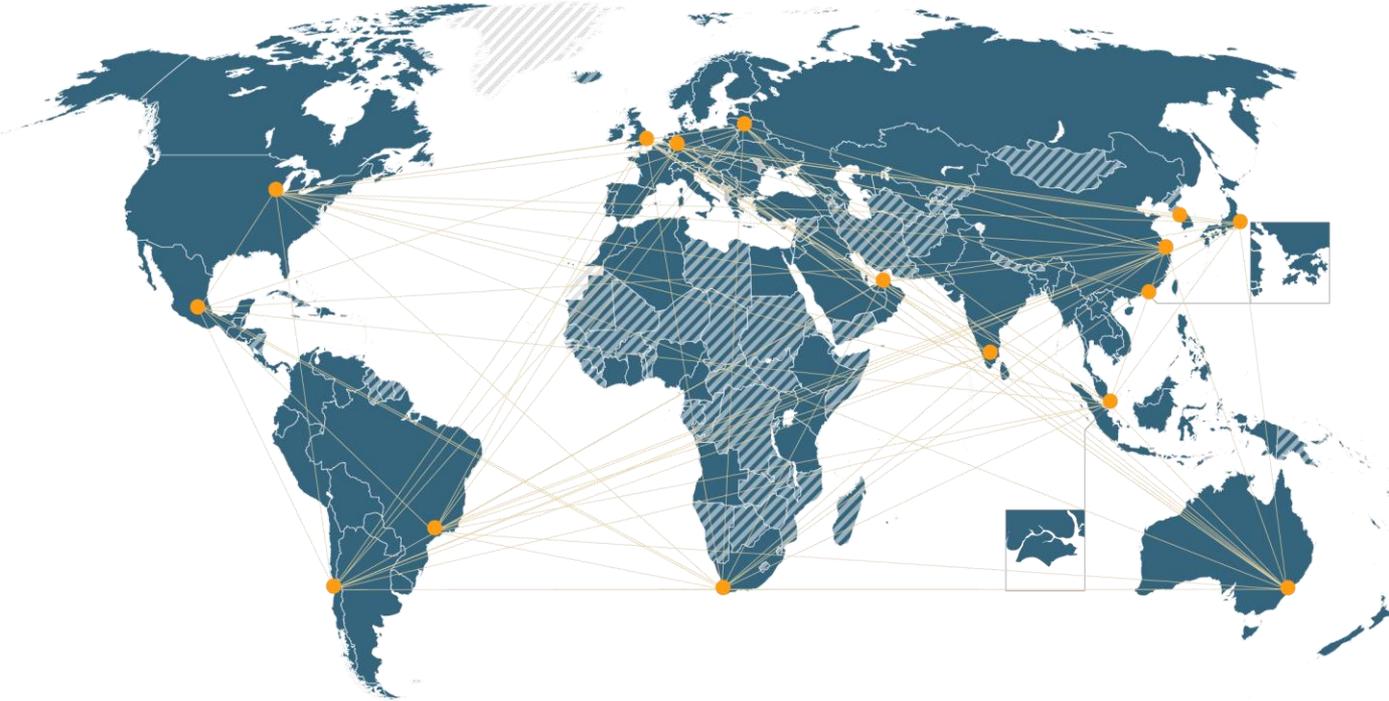


Asia Pacific and the Need for IP

The case for continued growth and expansion

March 2026

Euromonitor International leads the world in data analytics and research



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100 COUNTRIES

in-depth analysis on
consumer goods and
service industries

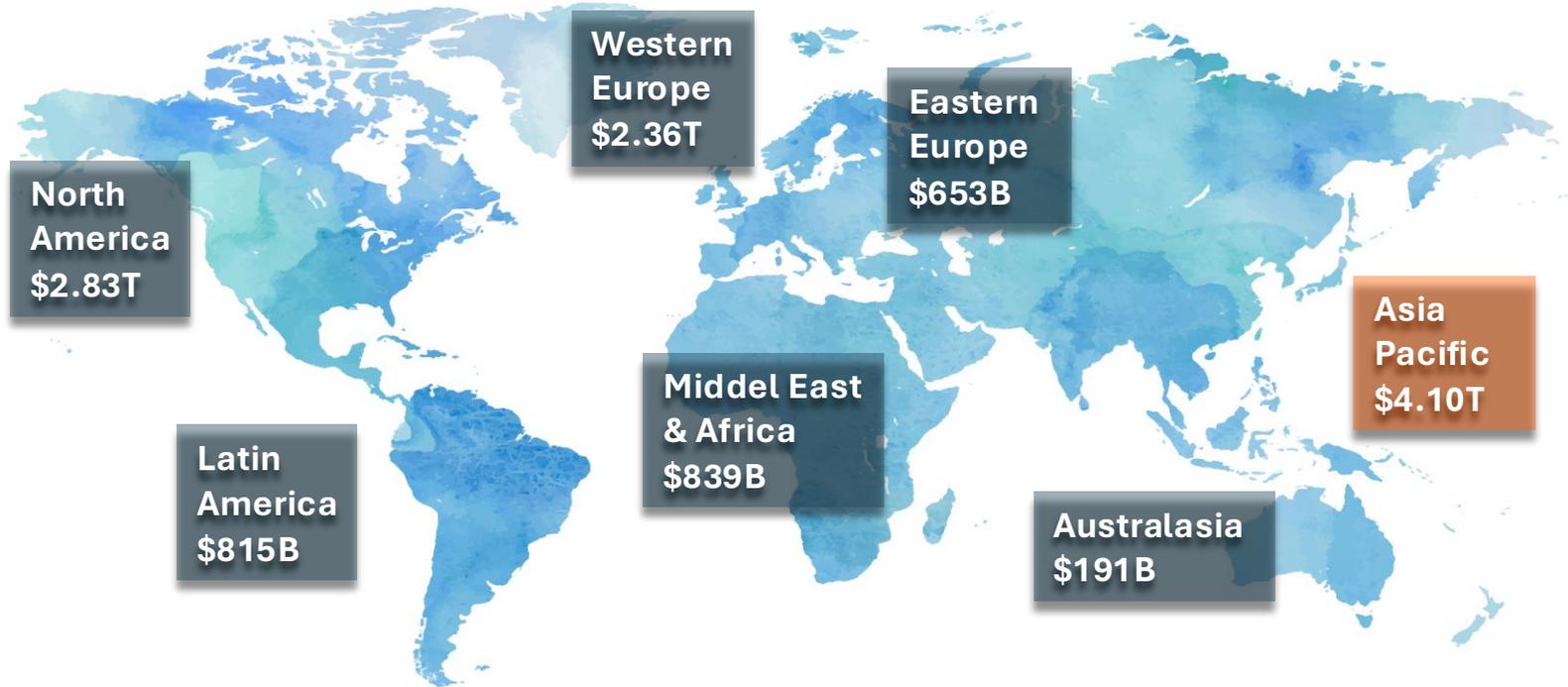
210 COUNTRIES + AND TERRITORIES

demographic, macro- and
socio-economic data on
consumers and economies

Contents

- Food demand in Asia Pacific
- A brief look at trade performance
- Consumer needs
- Why IP and why now?

Global spend on foodservice & grocery retailing nearly US\$11.8T



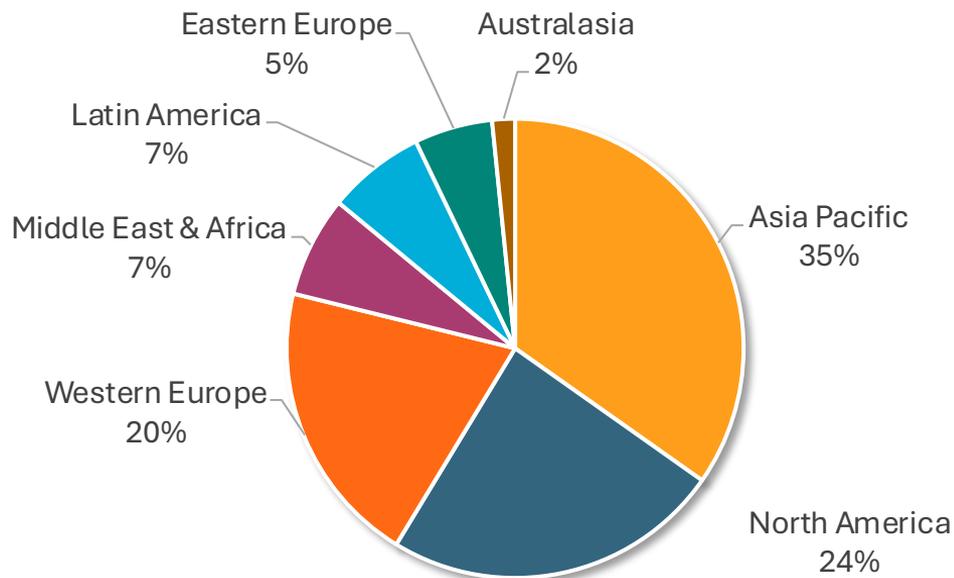
Source: Euromonitor's Passport data system

NOTE: This excludes institutional channels (e.g., hospitals, schools, military, etc.)

AP TOTAL SALES IN FOODSERVICE & GROCERY RETAIL ARE LARGER THAN LA, MEA, & W. EUROPE COMBINED

Asia's share reflects ability to drive substantial change

Share of Total Global Foodservice and Grocery Retailing Sales by Region - 2025

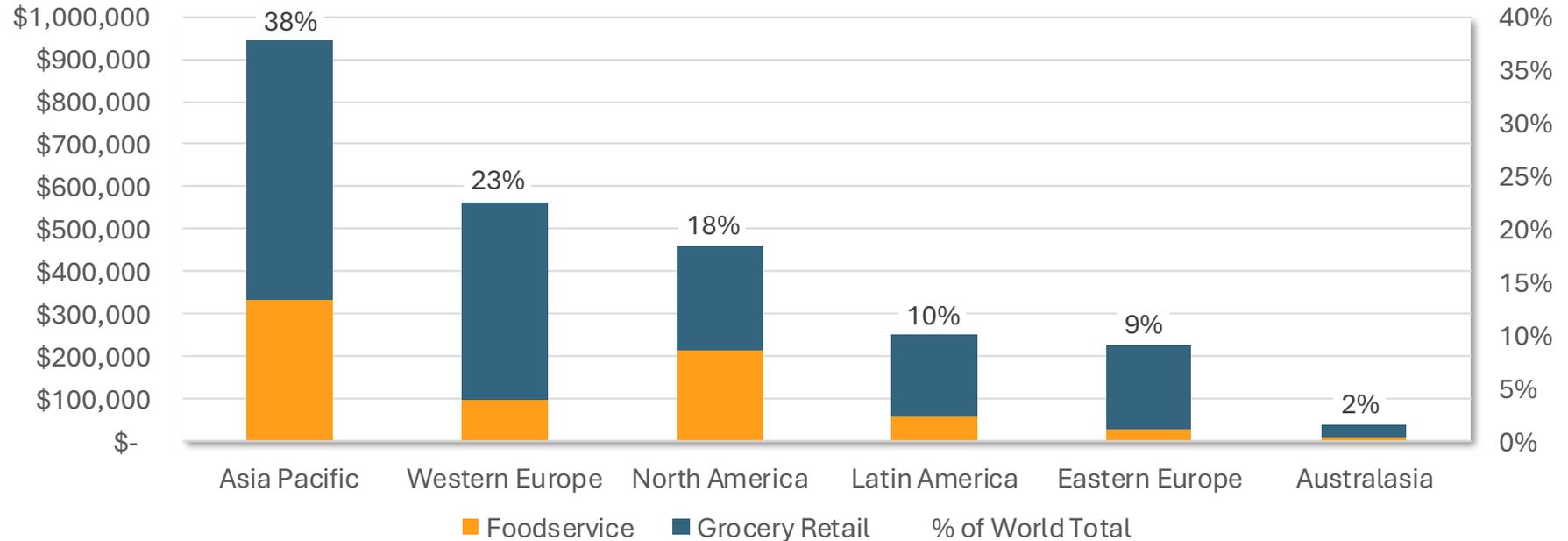


Source: Euromonitor's Passport data system



Asia Pacific's forecasted growth greatly leads over other regions

Forecast Growth & Share of World Total for
Foodservice & Grocery Retail Sales - US\$ Millions – 2025-2030



Source: Euromonitor's Passport data system

Even if you don't like mathematics, you will like this...

1 **\$944,753,000,000** = total growth in across Asia Pacific from 2025-2030

2 Divide this by 6 years (2025, 2026, 2027, 2028, 2029, and 2030) =
\$157,458,833,333 per year

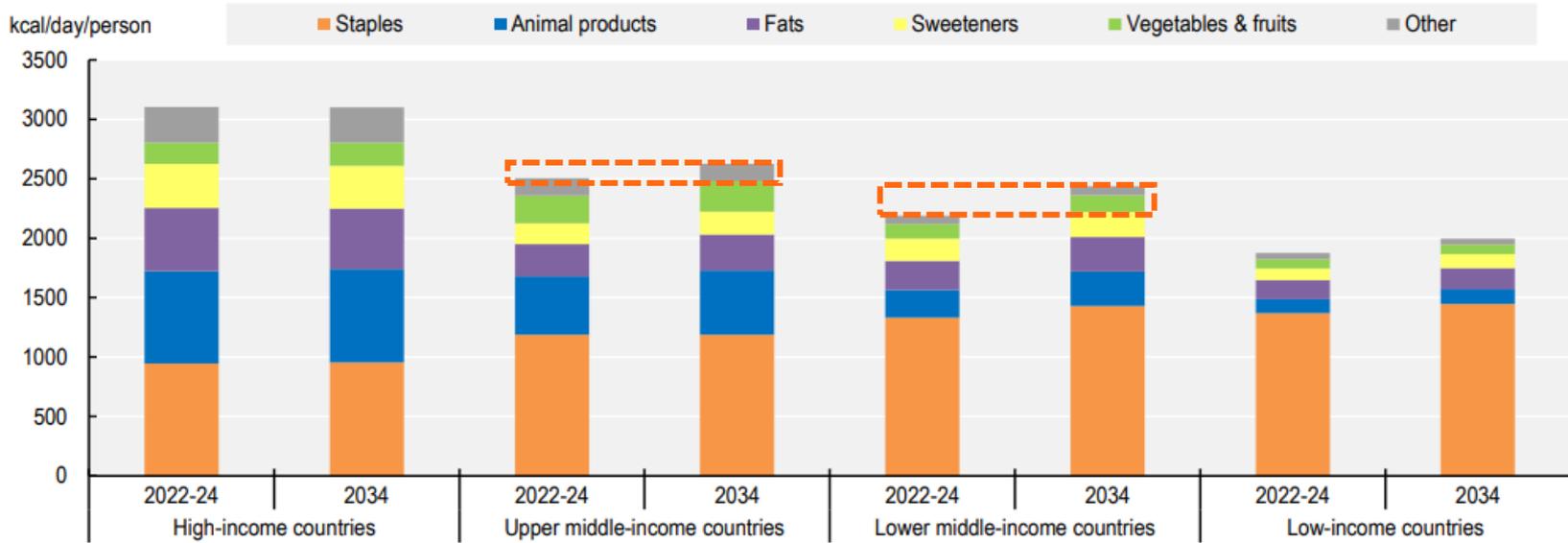
3 Divide this by 365 days in the year = **\$431,394,064** per day

4 **\$17,974,753** per hour

5 Nearly **\$300,000** per minute 24/7



Increased consumption driven by middle-income countries

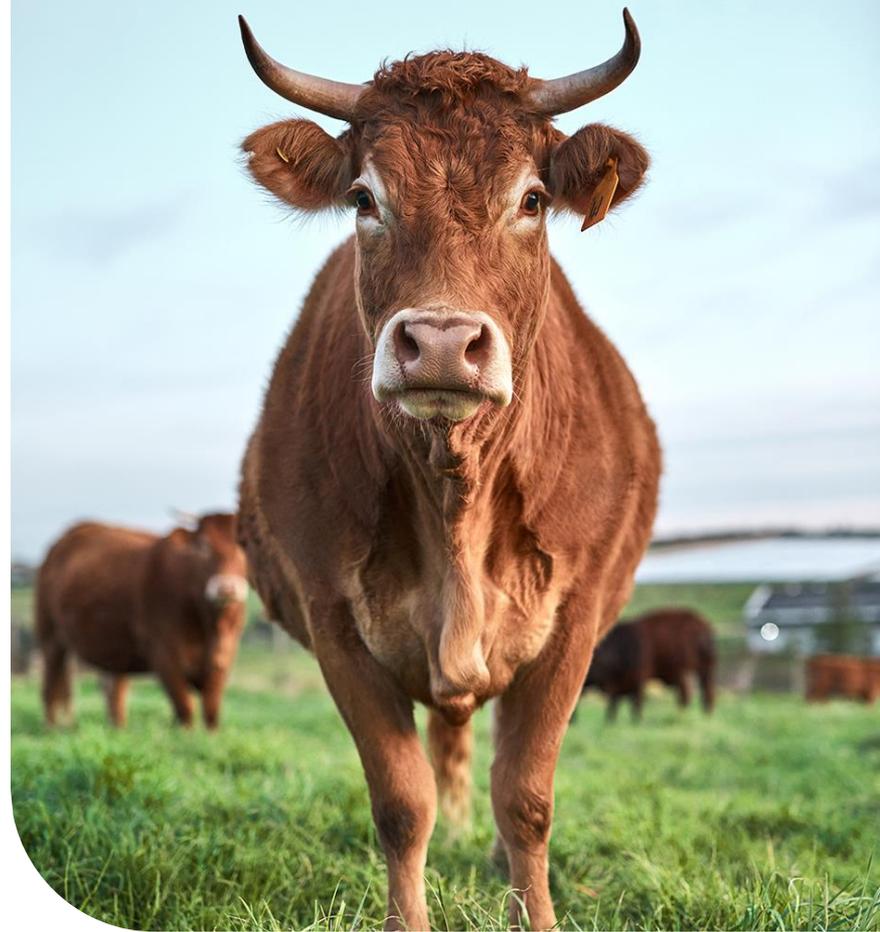


Source: OECD/FAO (2025), "OECD-FAO Agricultural Outlook", OECD Agriculture statistics (database), <http://data-explorer.oecd.org/s/1hc>.

Note: Estimates are based on historical food supply time series from the FAOSTAT Food Balance Sheets database which are extended with the Outlook database and adjusted to account for estimated distributional and household wastes. Products not covered in the Outlook are extended by trends. Staples include cereals, roots and tubers and pulses. Animal products include meat, dairy products (excluding butter), eggs and fish. Fats include butter and vegetable oil. Sweeteners include sugar and HFCS. The category 'Other' includes other crop and animal

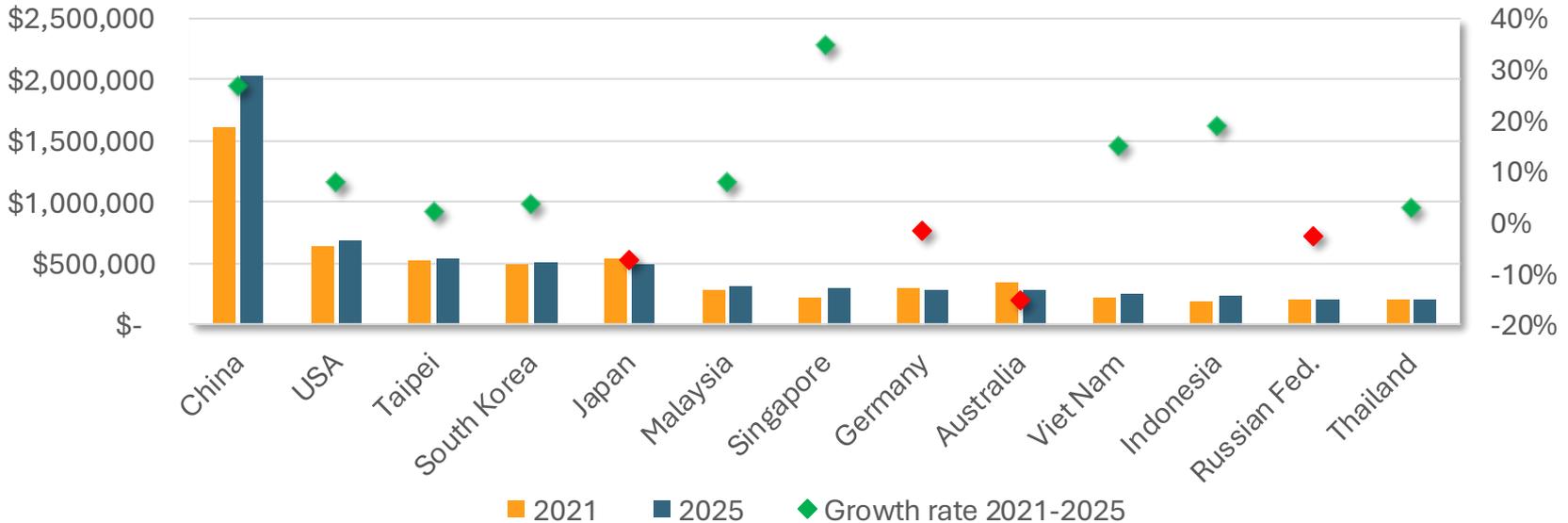
Demand for animal protein products driving increased feed usage

- The **South and Southeast Asia** equals approximately **16% of animal feed** use globally
- A **25% increase in feed usage is expected** over the next 7 to 8 years, driven by larger herd sizes and increase in feed usage to support meat and dairy production.
- **India** biggest share of usage



Asia shows expanding reliance on the U.S. and intra-regional trade

Imports of All Products by Asia from Leading Intra-regional & International Trade Partners in US\$ M - 2021-2025



Source: Data from International Trade Centre at www.intracen.org

A few news headlines highlighting safety and health issues

Indonesian officials apologize for mass food poisoning from free meals

40 kitchens closed after 6,000 children fall sick

Outrage in China over use of unwashed fuel tankers to transport cooking oil

Food safety scandal exposed by state-run newspaper has implicated several major Chinese firms

China's Mines Poisoning SE Asian Rivers, Global Food Supplies

'Radioactive' shrimp crisis: Indonesia grapples with contaminated industrial zone

South Korea boosts K-Food security amid rise in fake products

Air pollution kills 1 million people a year in Bangladesh and South Asia: World Bank

Pesticide residues dominate China's latest food safety findings

Is food at Korean highway rest areas really safe?

India's food safety crisis: How contaminated and ultra-processed foods threaten public health

“

IP foods and ingredients in Asia are not expanding because of a trend—they are expanding because **commodity systems no longer meet market requirements** in several core Asian use cases.

-OECD



The building blocks shaping the present and future



Transparency and perceived safety are now significant influencers in food choices

Regulatory tightening on ingredients, food safety, and labeling to help address challenges, promote trust, and shape the future of food and supply systems

Product trust is a selling point for consumers and food manufacturers, including safety, consistency, verified origin and quality

Transparency shifting from differentiator to requirement

IP unlocks value wherever performance, consistency, traceability and safety matter

Importance of IP Commodities

Provides transparency, ensures quality and consistency, and delivers supply chain verification in critical Asian markets.

Regulatory Compliance

IP systems meet stringent import regulations in markets through robust safety protocols.

Applications in Industries

IP commodities support food processing, beverages, cosmetics, pharmaceuticals, and animal feed industries with desired and consistent qualities.

Market Competitiveness

IP systems elevate operational performance and enable premium market positioning through trust in quality and origin.



“

It's not the strongest species that survive, nor the most intelligent, but the ones most responsive to change.

—Charles Darwin



Ride the wave.

How do we win?

- ✓ Be proactive
- ✓ Embrace the ongoing growth opportunity
- ✓ Continue to use IP to differentiate and elevate
- ✓ Follow the opportunities to diversify markets and IP uses
- ✓ **Trade partners are partners...work together, grow together, win together**



Together we will capture greater success!



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