

*Global Nutrition Trends*

# Global Food Consumption: National Habits, Trends and Projections

Consumption of Animal Products and Crops  
in Major Countries and Regions, with simple  
projections to 2025

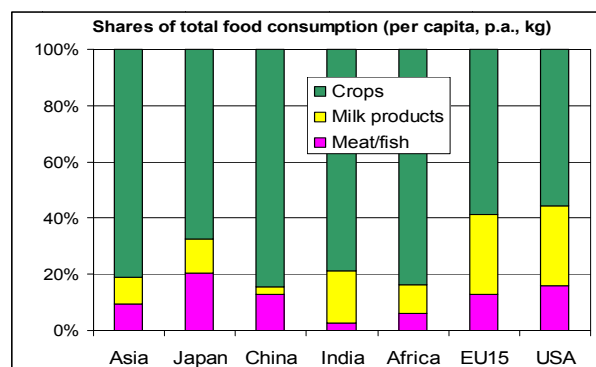
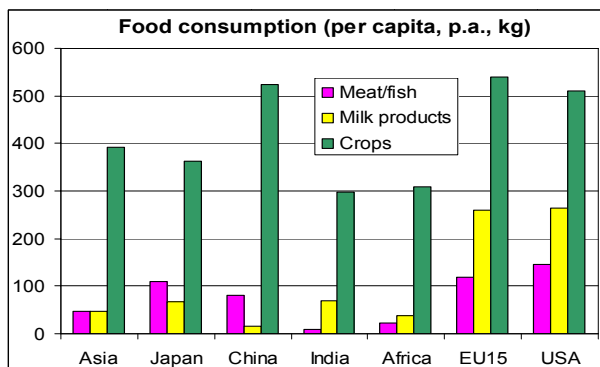


May 2006

## Executive Summary

### Per capita food consumption varies significantly across continents and countries

- Global average: 536 kg of food per person per year
- US and Europe over 900 kg, Africa 370 kg
- The Japanese eat only 60% as much as Europeans or Americans (per person)



### National food habits differ widely

- Animal food (milk, meat, fish) makes up over 40% of the food of Europeans and Americans - This share is less than 20% in Asia and Africa
- Milk-products are predominantly consumed in Europe and North-America
- India as a mostly vegetarian society consumes just 8% of the meat and fish an American or European would eat, while the Chinese (61%) have not that differing eating habits (particularly also when compared to Japanese people)
- Indians eat a record of 2.7 kg spices per person and year

### Trends and projections

- The table below shows past trends in food demand growth (1995-2003) as well as projected annual growth rates to 2025 (cf. page 2 for assumptions)
- We consider those projected trends most likely to be accurate if supported by 1995-2003 growth patterns (e.g. China milk product demand) while other projections are quite unlikely to prove correct (meat demand in India)

|                                       | Meat/fish |           | Milk products |           | Crops     |           | Total     |           |
|---------------------------------------|-----------|-----------|---------------|-----------|-----------|-----------|-----------|-----------|
|                                       | 1995-2003 | 2005-2025 | 1995-2003     | 2005-2025 | 1995-2003 | 2005-2025 | 1995-2003 | 2005-2025 |
| <b>Total Food (growth rate, p.a.)</b> |           |           |               |           |           |           |           |           |
| Asia                                  | 2.1%      | 4.3%      | 2.5%          | 7.2%      | 1.5%      | 1.8%      | 1.6%      | 2.9%      |
| Japan                                 | -0.6%     | 0.2%      | -0.5%         | 4.3%      | -1.1%     | 0.7%      | -0.9%     | 1.2%      |
| Korea                                 | 2.7%      | 0.7%      | 2.9%          | 8.9%      | -0.6%     | 0.2%      | 0.0%      | 1.1%      |
| China                                 | 3.7%      | 1.9%      | 10.0%         | 11.8%     | 3.1%      | 0.5%      | 3.3%      | 1.6%      |
| India                                 | 1.1%      | 11.6%     | 1.9%          | 5.6%      | 0.8%      | 2.8%      | 1.0%      | 3.9%      |
| Africa                                | 0.6%      | 8.5%      | 0.8%          | 9.2%      | 0.4%      | 3.5%      | 0.5%      | 4.9%      |
| EU15                                  | 0.7%      | 0.3%      | 0.8%          | 0.1%      | 0.8%      | 0.0%      | 0.8%      | 0.1%      |
| USA                                   | 0.5%      | 0.6%      | 0.1%          | 0.8%      | -0.2%     | 0.9%      | 0.0%      | 0.8%      |
| Developed countries                   | 0.5%      | 0.9%      | 0.5%          | 1.0%      | 0.6%      | 0.6%      | 0.6%      | 0.8%      |
| Developing countries                  | 1.9%      | 4.8%      | 1.8%          | 7.1%      | 1.3%      | 2.0%      | 1.4%      | 3.1%      |
| World                                 | 1.1%      | 3.6%      | 0.7%          | 4.8%      | 1.0%      | 1.8%      | 1.0%      | 2.6%      |

Source: FAO, CEI Group Calculations

Note: growth rates 1995-2003 are per capita, 2005-2025 total (including population growth)

green>5%, orange <-3%

- **Dairy product consumption is projected to grow strongly in Asia** (validated so far by recent trends in China only, however)
- **Meat consumption growth could continue above average in selected Asian countries** (but not very likely, for example, in India)

|                                       | Milk - Excluding Butter |           | Meat      |           | Fish, Seafood |           |
|---------------------------------------|-------------------------|-----------|-----------|-----------|---------------|-----------|
|                                       | 1995-2003               | 2005-2025 | 1995-2003 | 2005-2025 | 1995-2003     | 2005-2025 |
| <b>Total Food (growth rate, p.a.)</b> |                         |           |           |           |               |           |
| Asia                                  | 2.5%                    | 7.2%      | 2.8%      | 5.5%      | 1.0%          | 1.8%      |
| Japan                                 | -0.5%                   | 4.3%      | 0.0%      | 2.5%      | -1.0%         | -2.2%     |
| Korea                                 | 3.0%                    | 9.1%      | 3.7%      | 2.4%      | 1.9%          | -1.6%     |
| China                                 | 10.1%                   | 11.7%     | 4.3%      | 2.5%      | 2.5%          | 0.4%      |
| India                                 | 1.8%                    | 5.7%      | 1.0%      | 14.0%     | 1.1%          | 6.9%      |
| Africa                                | 0.8%                    | 9.2%      | 0.6%      | 9.5%      | 0.5%          | 5.7%      |
| EU15                                  | 0.8%                    | 0.1%      | 0.7%      | 0.5%      | 0.6%          | -0.2%     |
| USA                                   | 0.1%                    | 0.8%      | 0.6%      | 0.5%      | -0.3%         | 1.1%      |
| Developed countries                   | 0.5%                    | 1.0%      | 0.7%      | 1.1%      | 0.1%          | 0.3%      |
| Developing countries                  | 1.8%                    | 7.1%      | 2.3%      | 5.6%      | 1.1%          | 2.6%      |
| World                                 | 0.7%                    | 4.8%      | 1.3%      | 4.2%      | 0.7%          | 2.1%      |

Note: growth rates 1995-2003 are per capita, 2005-2025 total (including population growth)

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Source: FAO, CEI Group Calculations

- **Beer consumption set to continue to grow solidly in China** whereas projections made for the rest of Asia appear much less certain. India would have the potential to be a strong growth market for beer

|                                       | Beer      |           | Cereals - Excluding Beer |           | Fruits - Excluding Wine |           | Vegetable Oils |           |
|---------------------------------------|-----------|-----------|--------------------------|-----------|-------------------------|-----------|----------------|-----------|
|                                       | 1995-2003 | 2005-2025 | 1995-2003                | 2005-2025 | 1995-2003               | 2005-2025 | 1995-2003      | 2005-2025 |
| <b>Total Food (growth rate, p.a.)</b> |           |           |                          |           |                         |           |                |           |
| Asia                                  | 1.8%      | 9.0%      | -1.1%                    | 0.2%      | 2.2%                    | 3.6%      | 3.5%           | 3.5%      |
| Japan                                 | -7.2%     | 2.7%      | -0.2%                    | -0.3%     | 0.4%                    | 1.9%      | 2.1%           | 1.0%      |
| Korea                                 | -0.6%     | 2.6%      | -1.7%                    | -0.3%     | -1.0%                   | 1.9%      | 5.9%           | 1.6%      |
| China                                 | 5.1%      | 5.3%      | -2.6%                    | -0.2%     | 5.7%                    | 3.1%      | 6.0%           | 2.7%      |
| India                                 | -4.9%     | 31.9%     | -0.5%                    | 0.4%      | 1.5%                    | 4.8%      | 3.9%           | 3.8%      |
| Africa                                | 0.2%      | 11.5%     | 0.3%                     | 1.4%      | -0.2%                   | 4.4%      | 0.0%           | 5.3%      |
| EU15                                  | -0.9%     | 0.3%      | 1.3%                     | 0.0%      | 1.8%                    | 0.0%      | 0.3%           | 0.5%      |
| USA                                   | -0.3%     | 0.6%      | -1.3%                    | 1.0%      | 0.3%                    | 0.9%      | 1.2%           | 0.5%      |
| Developed countries                   | 0.6%      | 1.0%      | -0.1%                    | 0.0%      | 1.5%                    | 1.1%      | 1.3%           | 1.0%      |
| Developing countries                  | 1.8%      | 8.5%      | -0.8%                    | 0.4%      | 1.4%                    | 3.3%      | 2.5%           | 3.7%      |
| World                                 | 0.6%      | 5.3%      | -0.6%                    | 0.4%      | 1.3%                    | 2.8%      | 2.0%           | 3.1%      |

Note: growth rates 1995-2003 are per capita, 2005-2025 total (including population growth)

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Source: FAO, CEI Group Calculations

- Increased consumption of **Chocolate** (Cocoa Beans) could be an emerging trend in Asia (cf. Korea, where growth was strong in the past 10 years and projected to continue strong as eating habits westernize)
- Sugar demand growth projected to rise (projections exclude potential fuel demand growth). Artificial sweeteners have yet to gain ground in emerging economies but could be a solid growth market (cf. separate sections)
- Potatoes gained in popularity in Asia, particularly in China, but also in India – and in Africa

|                                       | Cocoa Beans |           | Sugar, Refined Equiv |           | Potatoes  |           | Vegetables |           |
|---------------------------------------|-------------|-----------|----------------------|-----------|-----------|-----------|------------|-----------|
|                                       | 1995-2003   | 2005-2025 | 1995-2003            | 2005-2025 | 1995-2003 | 2005-2025 | 1995-2003  | 2005-2025 |
| <b>Total Food (growth rate, p.a.)</b> |             |           |                      |           |           |           |            |           |
| Asia                                  | 0.0%        | 14.7%     | 1.5%                 | 3.7%      | 6.4%      | 4.4%      | 4.9%       | 0.7%      |
| Japan                                 | 4.7%        | 1.5%      | -1.3%                | 1.6%      | -1.3%     | 3.4%      | -1.2%      | 0.2%      |
| Korea                                 | 9.1%        | 6.8%      | 0.7%                 | 2.0%      | -2.1%     | 7.9%      | -0.5%      | -1.0%     |
| China                                 | n.a.        | #DIV/0!   | 1.3%                 | 5.8%      | 11.8%     | 2.6%      | 7.8%       | -1.0%     |
| India                                 | n.a.        | #DIV/0!   | 2.8%                 | 3.1%      | 3.1%      | 6.0%      | 2.5%       | 2.9%      |
| Africa                                | 9.1%        | 12.1%     | 1.1%                 | 4.5%      | 3.3%      | 8.1%      | 1.4%       | 4.6%      |
| EU15                                  | 1.7%        | 0.1%      | 0.5%                 | -0.1%     | -0.3%     | -0.1%     | 0.7%       | 0.0%      |
| USA                                   | 1.6%        | 0.8%      | 0.4%                 | 1.0%      | 0.9%      | 1.1%      | 0.2%       | 0.9%      |
| Developed countries                   | 2.3%        | 1.2%      | 0.7%                 | 0.4%      | 0.2%      | 0.2%      | 0.7%       | 0.5%      |
| Developing countries                  | 0.0%        | 11.1%     | 1.3%                 | 3.1%      | 5.6%      | 5.0%      | 4.6%       | 1.2%      |
| World                                 | 0.0%        | 6.6%      | 0.9%                 | 2.4%      | 2.2%      | 3.3%      | 3.6%       | 1.2%      |

Note: growth rates 1995-2003 are per capita, 2005-2025 total (including population growth)

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Source: FAO, CEI Group Calculations

Full study on request.

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