



# MedArtSal

## Sustainable Management Model for Mediterranean Artisanal Salinas

**WP5 - Marketing**  
**Strategic Marketing Plan**  
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## 1 Introduction - WP 5 Overview

The artisanal salt market is an interesting niche that has grown significantly in recent years and where the business opportunities are encouraged by the fact that the control of the distribution channels is much lower than the industrial salt one. To approach, a Marketing Plan that combines traditional and digital strategies is absolutely essential, since the internet channel has the greatest interest for the commercialization of the potential products generated in the project. In this regard, the following general objectives are proposed:

- to design a marketing strategy that facilitates the international commercialization of products (goods and services)
- to carry out a market research of the artisan salt
- to study the possible market segments as well as the desired positioning for the group's brands products
- to establish the commercial objectives in accordance with the salinas capacities and with the minimum necessary profitability
- to design a Marketing Plan and a digital marketing strategy
- to develop a sustainable tourism and territorial marketing strategy

Secondary sources (reports, studies, articles, books, etc.) and primary sources (surveys and personal interviews) will be used for this purpose (due to Covid-19 has been impossible to use primary data sources so that a qualitative study have been conducted to supply primary information).

According on the results of the research, market segments, positioning, commercial objectives and strategies to be followed has been defined.

Two salt fairs (1 TN, 1 LN) of 2-days will be organized (if possible) to foster clustering and networking of Med artisanal salinas and entrepreneurs, improving economic diversification and territorial cohesion. 25 expected participating salinas and participants will benefit by exchange of knowhow and market and marketing information.

The WP leader (PP04) will be operatively supported by experts from all PPs, with particular reference to LB for SME clustering and tourism, PP1 for eco-tourism, and PP05 and PP06 for Tunisian and Lebanese fairs respectively.

To carry out all the activities the following plan (Outputs and Activities) has been described:

- Output 5.1 Strategic Marketing Plan
  - A5.1.1. Perform a market analysis report and define marketing strategy objectives
  - A5.1.2. Identify target segmentation and brand positioning. Definition of commercial goals
  - A5.1.3. Design of the Marketing plan and Strategy
- Output 5.2 Digital Marketing Strategy
  - A5.2.1. Create an e-commerce platform to support Mediterranean salinas commercial products and activities
  - A5.2.2. Design an Inbound strategy, SEO & SEM positioning strategies
- Output 5.3 Sustainable tourism and territorial marketing
  - A5.3.1. Cluster brand strategy
  - A5.3.2. SMEs cluster
  - A5.3.3. Awareness campaign
  - A5.3.4. Territorial Ho.re.ca strategy
- Output 5.4 MedArtSal Fair
  - A5.4.1. Fair organization



## A5.4.2. Fair execution

### 1.1 Expected output description

#### 1.1.1 Output 5.1

A strategic marketing plan will be developed, considering the particularities of different salinas. It should include a market research (link to OT3.1), segmentation and positioning, business objectives “SMART”, marketing strategies approach, digital marketing strategy, sustainable tourism and territorial management strategy, AOC (Appellation d’origine controlée) or PDO (protective designation of origin), awareness campaigns tools and program of audit and control of results and feedback. This final plan will be published in the project website and free downloadable.

#### 1.1.2 Output 5.2

In addition to the conventional marketing strategy, it is absolutely essential to design a digital marketing strategy, through e-commerce, widely conveyed by internet. For this it will be necessary to create a sale platform and to develop a non-intrusive inbound marketing strategy. All this will require the collaboration of digital marketing agencies or, where appropriate, could be proposed scholarship holders digital marketing that takes place in the UCA. The platform will be open to all users (salinas involved in the project as well as their competitors) in order to increase the diffusion and to maximize the effect on market.

#### 1.1.3 Output 5.3

The SMEs cluster aims to:

- foster collaborations effectively competing on B2C (residents and tourists) and B2B (GDO and HO.RE.CA) markets;
- develop a brand architecture (umbrella brand plus a local based brand), in collaboration with local authorities (e.g. informative signs, museums);
- position salinas’ products as a souvenir (e.g. salt museum), supporting the market internationalization;
- build network among local producers and tourism businesses to develop thematic tourism experiences.

#### 1.1.4 Output 5.4

Two MedArtSal salt fairs (1 in Tunisia, 1 in Lebanon) will be organized to foster clustering and networking of Med artisanal salinas and entrepreneurs, improving economic diversification and territorial cohesion. Clusters are a striking and remarkable feature in today’s economy and they stimulate the productivity and competitiveness at national and regional level. Salinas will benefit by exchange of knowhow and market and marketing information

### 1.2 State of play

Marketing wp5 strategic Plan is about how can we support our partners to improve the commercial strategy in the Gourmet market and the Salinas tourist activities.

The first step is related to the Marketing Plan and include 3 Activities: Market Analysis (first semester of implementation); Segmentation, positioning and commercial goals (second semester) and the Marketing Plan (second year).

This report is about the market analysis, segmentation, positioning and goals as planned.

In General terms we have study and report a market analysis dealing with the following subjects:

- Salt Market introduction
- Key market trends



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- Key success factors
- Market demand
- Pricing analysis
- Market background
- Analysis by product type
- Analysis by end use
- Analysis by region
- Market structure

Also, due to Covid-19, primary data can't be obtained at all, for this reason we decided to change methodology and perform a qualitative analysis based on focus group technic, share with CUEIM to perform in Italy (we have a previous Salt focus group performed in Spain) and to be done on second year.



## 2 Objectives – Goals and Methodology

### 2.1 Objectives and Goals

WP5 focus is on marketing activities. As a general subject we try to design a Marketing Plan useful for SEM to improve his companies in marketing action. For that purpose we have planned to reach the following objectives and goals:

- 1.- Report a Strategic Marketing Plan including a market research, segmentation options, positioning ideas and relevant goals to be achieved for SME.
- 2.- Create a Digital Marketing Strategy through an e-commerce platform and inbound, SEO and SEM actions.
- 3.- Sustainable tourism and Territorial Marketing Plan
- 4.- Medartsal Fair

This report is about first goal: Strategic Marketing Plan

### 2.2 Methodology

To reach the objectives mentioned, we planned to use both secondary and primary data information. Secondary data come from different sources as a result of an intensive search about salt market and gourmet sector, looking for data market information. As a primary data, we planned to use survey questionnaire while visiting Salinas partners as a benchmarking action. Due to Covid-19 has not been possible to travel so we change to qualitative methodology as a provisional alternative to get primary data. The selected technique was Focus Group to be carried out in Spain and Italy. Results may be next in third semester.



### 3 Results (1) – Gourmet Salt Market analysis

The Global Gourmet Salts market was valued at US\$ 2,339.2 Mn in 2019, and is projected to be valued at US\$ 3,752.2 Mn by 2029 end. Sales revenue is expected to increase at a CAGR of 4.8% during the forecast period (2019-2029). In terms of volume, the Global Gourmet Salts market was pegged at 52,857 MT in 2019, and is projected to reach 75,363 MT by 2029 end. Volume sales is expected to increase at a CAGR of 3.6% during the forecast period (2019-2029). Data is represented on figures 1 and 2.

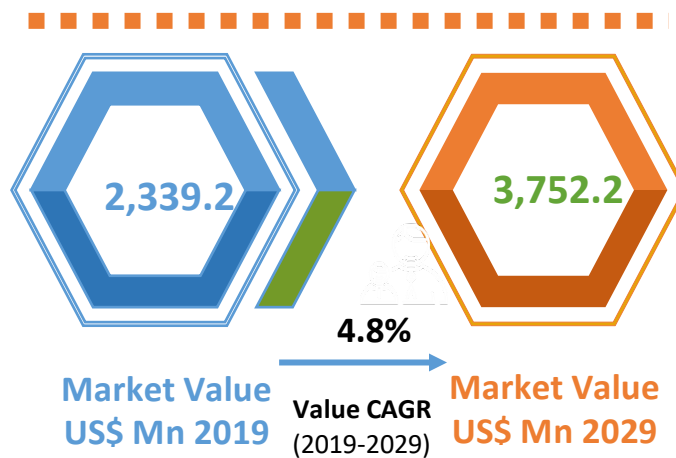


Fig. 1 – Gourmet Salt Market (Value)

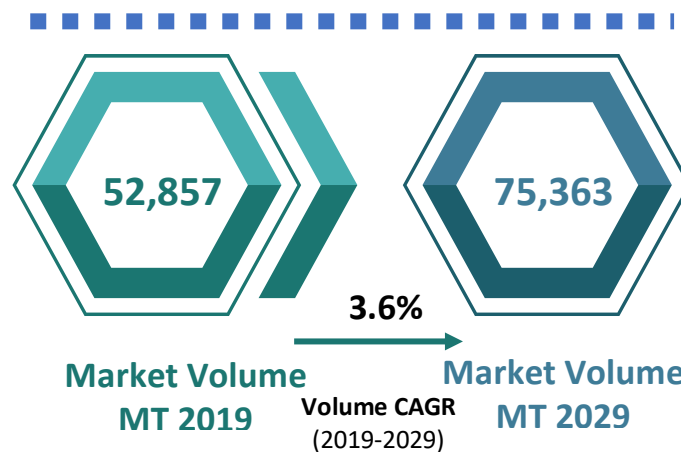


Fig. 2 – Gourmet Salt Market (Volume)





The Europe region is estimated to dominate the Global Gourmet Salts market, with a 35.9% market share in terms of value by 2019 end.

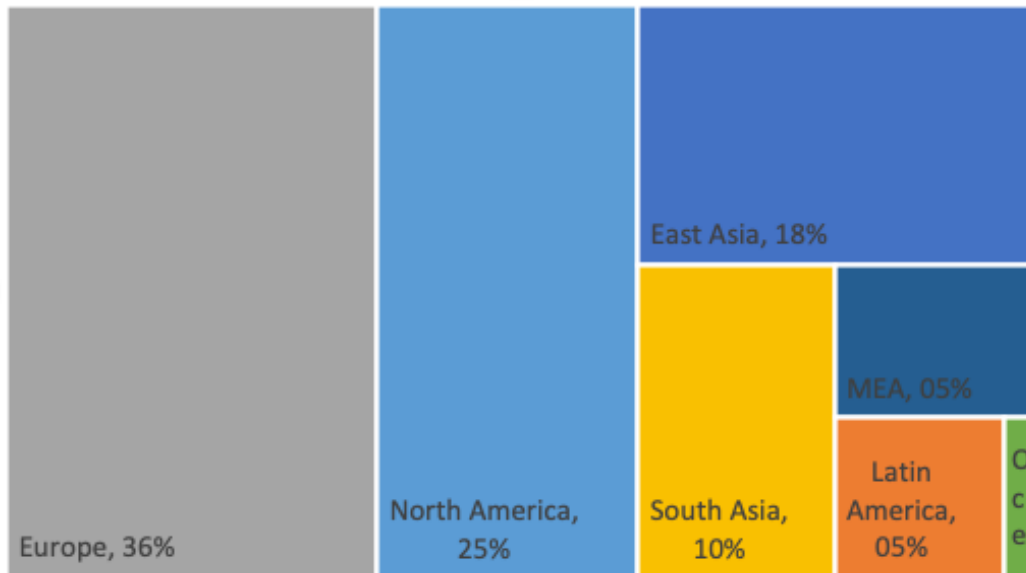


Fig. 3 – Gourmet Salt Market (by region)

By product type, the Fleur de Sel is estimated to dominate the Global Gourmet Salts market, with a revenue share of 27.4% by 2019 end.

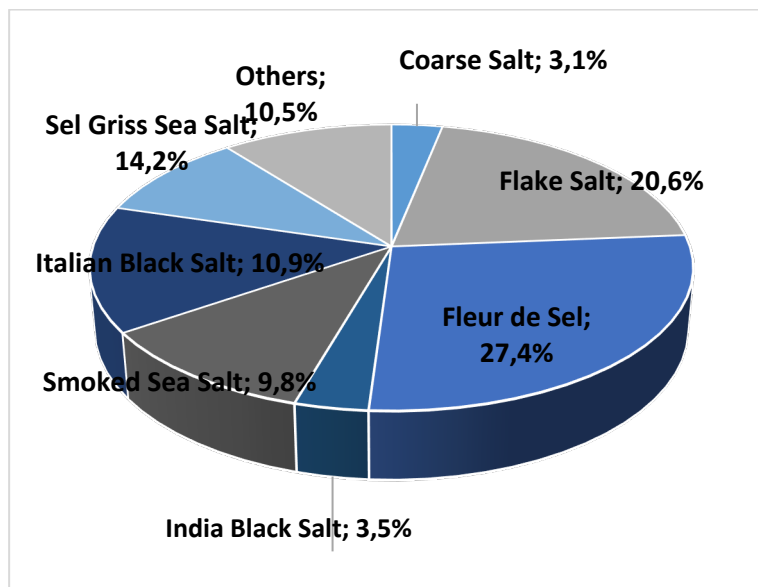


Fig.4 – Gourmet Salt Market (by product type)

By application, Meat & Poultry segment is estimated to dominate the Global Gourmet Salts market, with a revenue share of 31.2% by 2019 end.

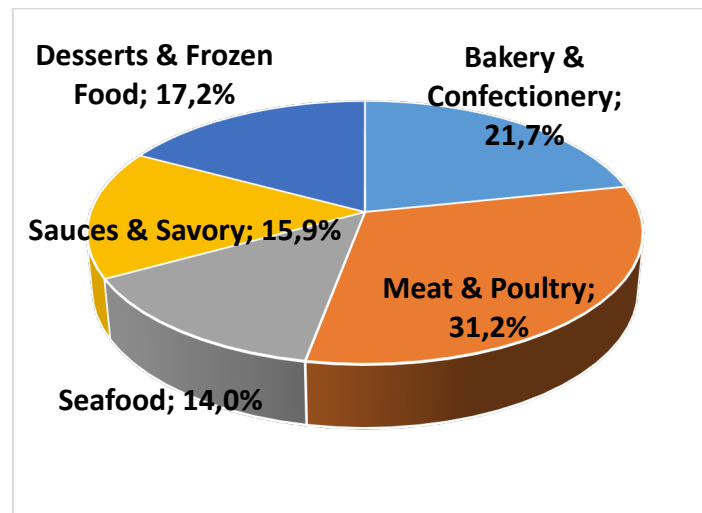


Fig. 5 – Gourmet Salt Market (by application)

The market key drivers and Trends includes the following items: Greater spending on fine food and beverages; Increasing use of Gourmet Salt in exotic food preparations; Launch of Next generation Gourmet salt; Clean label Speciality products; Fancy and durable packaging for a new range of Gourmet salts.

Related to Market Strategy, Companies are trying to expand their market presence, product portfolio, and distribution networks through acquisitions and collaborations as Gourmet Salts market is highly fragmented and highly competitive with a large number of small local players and few global players. End-user companies and manufacturers are collaborating and forming alliances on the basis of a quality of products as in the U.S. and European countries, companies are more concern towards the purity and quality of Gourmet Salts.

As to Target market In the global market, the demand for Gourmet Salts is increasing in meat, poultry & fish products. Increasing demand for exotic preparations of meat & poultry is expected to increase the demand for Gourmet Salts across the globe. Furthermore, The increasing consumer interest various seafood products also proves to be a positive factor for gourmet salt market.

About Target regions, Europe represents a majority of market share in terms of value and volume, but the demand for Gourmet Salts products is expected to be low in the region. Currently, the demand for Gourmet Salts products is increasing at significant growth in Asian markets owing to flourishing end user industries such as food service and food processing industries. This expects to higher demand for Gourmet Salts in near future.

Finally, the key differentiation strategy adopted by the manufacturers is to innovate various packaging formats. The manufacturers are innovating and implementing the new types of packaging to attract the attention of the consumers which will define their gourmet salt as the premium product. Companies are more focused on the application of Gourmet Salts in a variety of applications, companies are offering tailor-



made solutions for new product applications. For instance, along with the use of Gourmet Salts in exotic food, companies are also offering Gourmet Salts for application in frozen food, bakery products, and seafood.

### 3.1 Market Introduction

Gourmet salts are basically sea salts with lower sodium levels and are harvested naturally. These salts are available in various colors, textures, forms, packaging formats and flavors. Emergence of demand for gourmet salts has been due to consumer concern for healthier alternatives, clean-label products, increase awareness of products across various social media platforms and growing traction towards innovative flavors and ingredients. The gourmet salt is either harvested or mined. Harvested salt is obtained from sea water, whereas, mined salt is obtained from mineral rocks and other sources and is not as important as for this project.

On the basis of Product Type, Gourmet Salts market is segmented Coarse Salt, Flake Salt, Fleur de Sel, Indian Black Salt, Italian Sea Salt, Sel Griss Sea Salt, Smoked Sea Salt, Others. In the others segment we have considered the gourmet salt such as himalayan pink salt and specialty flavored salts.

By End Use, the Gourmet Salts market is segmented into Bakery & Confectionery, Meat & Poultry, Seafood, Sauces & Savory, Desserts & Frozen Food.

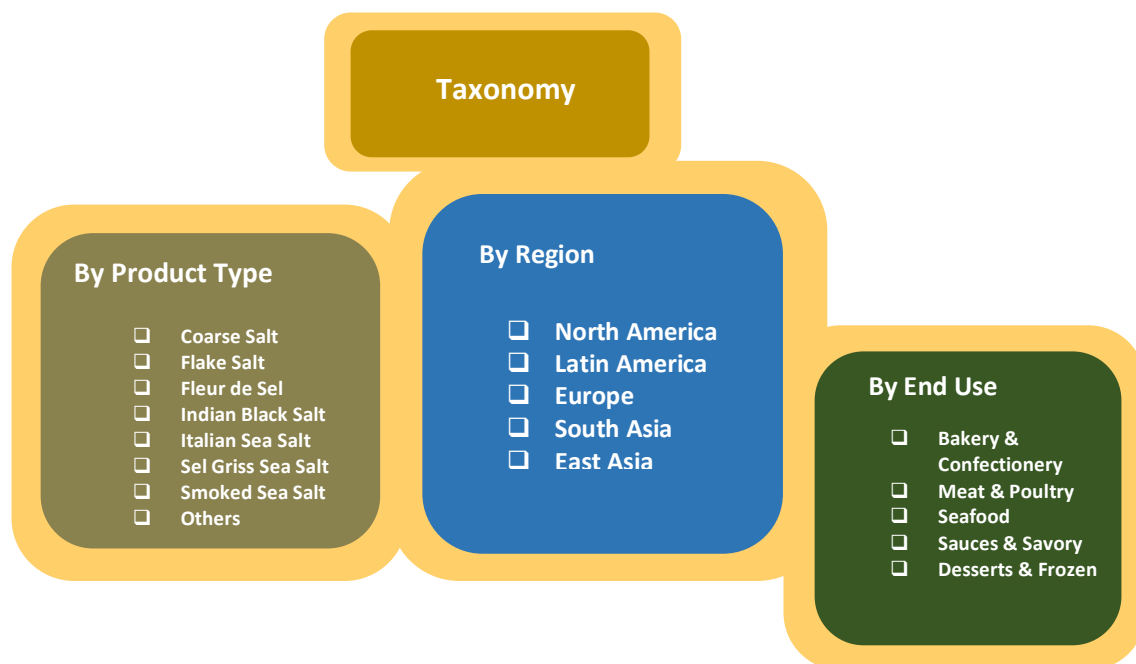


Fig. 6 – Gourmet Salt Market (taxonomy)

### 3.2 Key Market Trends



In general terms, global food and beverage industry is affected by the following trends:

- High demand for natural, healthy, functional and organic
- Increase label scrutiny and recognized ingredient list
- Transparent and clear information
- Significance for ethical positioning such a eco-friendly, recycled, natural and others
- On-the-go consumption
- Demand for credible labeling and certification
- Preference for plant-based food and beverage products
- Animal welfare

The key trends impacting the market related to edible insect movement in North America that is leading to new innovations in the edible insect ingredients market. This has resulted in a new ingredient innovation in gourmet salts, called Himalayan Pink - The Cricket Salt. This salt is spiced with cricket powder made from real crickets; Increasing awareness about clean label products among consumers is raising the demand for clean label ingredients. Consumers are now aware of the health benefits of clean label products. This trend is forcing gourmet salt manufacturers to focus on the introduction of clean label specialty ingredients for application in various food segments. The growing interest and trend of exotic food among consumers is expected to boost the gourmet salt market; Most of the leading suppliers of gourmet salt are now focusing on the attractive packaging of their gourmet salt varieties. Companies are now offering the same gourmet salt in different packaging, shapes, sizes, and materials. Also, the durability, efficiency, and quality of the packaging are kept at high priority (*In June 2017, SaltWorks, a leading supplier of gourmet salt, introduced new products with new packaging styles, such as pour-spout pouches, refillable ceramic grinders, boutique glass jars, and reusable salt shakers, at the ‘Summer Fancy Food Show’ in New York City.*)

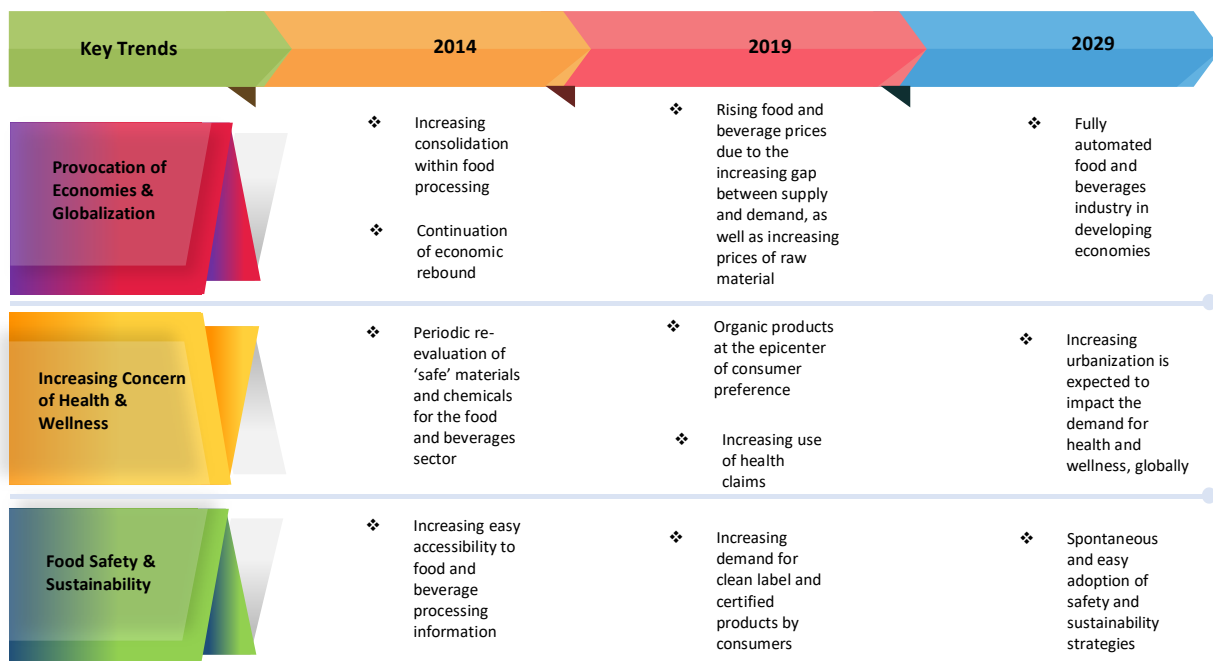


Fig. 7– key market trends resume



### 3.3 Key Success Factors

#### 3.3.1 By product type

The global gourmet salts market success factors by product type is represented by the following:

**Sel Gris:** This salt is gray in color, has high moisture content, and contains complex minerals. It is used in cooking and finishing salts.

- *In September 2015, Gear Petrol published an article on Primer Salts, comparing industrial salt and sea salt. The article lays emphasis on gourmet sea salt, and suggests the use of Sel Gris, flake salt, and Fleur de Sel for salad, meat, and all-purpose food products.*
- *In November 2013, SaltWorks was certified by the prestigious Nature et Progress, an organization that ensures the quality and purity of high-end sea salt, for its Sel Gris and French grey sea salt products, which are available in fine and velvet form.*

**Smoked Sea Salt:** Smoked salts are created by a natural smoking method using real wood fire to infuse the salt crystals with 100 percent natural smoke.

- *In March 2015, Hollywood Farmer's Market added Spice Alley, a new extension of the market devoted to spices and gourmet sea salts. Vendors such as Hepps Salt Co would offer exotic selections of gourmet salts that include smoked salts, natural blends, cooking salts, and finishing salts.*
- *In February 2014, SousChef.co.uk, a specialty cooking ingredients website, launched Ottolenghi's online pantry range, that included lemon myrtle salt from Queensland in Australia, and Welsh oak smoked sea salt and Harrods which is a luxury department store in London offered a space in its store totally dedicated to gourmet salts shelving.*

**Indian Black Salt:** Indian black salt, also known as Kala Namak, is an unrefined mineral salt with strong sulfuric flavor and aroma. It is mainly used as a dressing in Indian savory dishes, and is also sprinkled on salads.

- *In February 2014, The Salt News published a recipe for popcorn with 'Kala Namak', which incorporates a strong pungent taste and adds fullness to the dish.*
- *In March 2015, StyleCraze published an article about the various health benefits of using Indian black salt in food. The salt offers a cure for high blood pressure, treatment of arthritis, and also offers other hair and skin benefits.*

**Flake Salt:** Flake salt is typically wide and thin in nature, and provides larger surface area to disperse seasoning as compared to other salts such as Fleur de Sel, Sel Gris and other traditionally used salts.

- *In August 2014, Salt News covered an article about the use of flake salt in the preparation of grapefruit salad, that gives it a beautiful and sparkling appearance.*

**Fleur de Sel:** This type of salt has a peculiar gray color and a distinct taste. It is characterized by high mineral content and complex mineral structure. It is also known as the Flower of salt and Caviar of salts

- *In March 2013, HEPP'S Salt CO published a new recipe for roasted asparagus using Fleur de Sel salt for flavor enhancement, and to retain the fresh green color of the dish.*



- *In April 2013, danazia.wordpress.com released an article about the amazing world of artisan salts, and covered the Meadow sea salt range and its benefits over common table salt.*

**Italian Sea Salt:** Italian sea salts are rich in flavor without being too overpowering or salty. These can be used in salads, and for finishing roasts and sauces.

- *In Sept 2018, Jacobsen LLC had launched the Italian Sea salt under the category of seasoning salt at the Expo East 2018.*
- *In February 2013, Hepps Salt Bar published a review of its product offerings, that include finishing salt varieties such as black truffle that is composed of Italian sea salt mixed with dried black truffles collected from the Abruzzi region of Italy. It is used as a garnishing salt for egg and pasta dishes, and is often described by users as the most flavorful salt in the whole world.*

**Coarse Salt:** This type of salt is characterized by large grains, low moisture sensitivity, and is best suited for grinders.

- *In March 2015, Burbank, CA launched a new product called the dual salt grinder and pepper mill. This is specially designed for coarse salt grinding to get desired size grain size.*
- *In August 2014, Halfpops launched two new flavors—Caramel & Sea Salt and Chipotle Barbeque—to expand its product offering of partially popped and fully delicious popcorn snack range*

**Others (Himalayan, flavoured, etc.):** Specialty salts and flavored salts are usually mixed with natural ingredients such as lemon, tomato, basil, and other natural flavors, and are mainly used in premium products.

- *In August 2012, Urbandale Hy-Vee commenced the sales of Artisan Salt Company salts such as Himalayan pink mineral salt, Hiwa Kai black lava salt, Yakima applewood smoked salt, and also other ranges of colorful exotic salts.*
- *In March 2012, Salt Farm launched a new specialty salt fortified with basil.*
- *In September 2014, Gustus Vitae Condiments commenced the sale of gourmet seasoning blends and finishing salts in California.*
- *In January 2015, Gourmet Italian—an Italian-based food specialist—offered a new line of artisan salt and sugar options at Olimila Gourmet Emporium—an Italian grocery store. This range includes various savory flavored salts, such as infused sea salt, which are created using a variety of raw and natural ingredients.*
- *In October 2017, Cricket Flours launched its innovative product Himalayan Pink, a handcrafted gourmet salt made from crickets. The cricket salt was launched on World Edible Insect Day.*
- *In December 2018, The Atlantic.com published a article about the health benefit of Himalayan Pink salt and how pink salt took over the common salt in many Chef's kitchen and in the households.*
- *In September 2019, Morton Salt has added a colorful new product to its product line-up with the launch of All-Natural Himalayan Pink Salt.*



### 3.3.2 By Application

**Bakery and Confectionery:** Bakery and confectionery product manufacturers lay emphasis on introducing novel and innovative products using ingredients such as gourmet salts in order to satiate consumer taste and preferences

- *In 2019, For the development of new products using gourmet salt, Murray River Salts has collaborated with Mildura Chocolate Co., and developed two new products - Salted Chocolate Sauce and Salted Chocolate Bars, by using a combination of dark chocolates and gourmet salt.*
- *In July 2015, General Mills launched Nature Valley's Simple Nut Bar, which is made of whole nuts, seeds, honey, tapioca syrup and sea salt. These gluten-free bars are available in in two flavors, namely, almond, cashew and sea salt, and roasted peanut and honey.*
- *In January 2014, Lindt and Sprungli launched Lindor coconut truffles and classic recipe caramel sea salt bars. These new products are expected to cater to new consumer trend of premium chocolates with a hint of salt.*

**Meat and Poultry:** Meat and poultry products are part of daily diet in various regions, and restaurant and home cooks prefer salt blocks for meat cooking, smoking and curing as it imparts a unique flavor to the food product

- *In June 2019, the chef at Grass & Bone Butcher shop in mystic, makes his own salts to keep up with increased demand for flavored version.*
- *In March 2014, Emirates Gourmet General Trading LLC, launched Himalayan Pink Salt Coarse—an all-natural salt specially developed to enhance flavor of meat and seafood products*
- *In July 2014, Beyond The Shaker—a popular online food store—released a blog about rising adoption of gourmet sea and also announced launch of a new gourmet salt blend for meat grilling products*

**Seafood:** People are using gourmet salt blocks for cooking for parties or family get-togethers, as it imparts unique flavor especially to seafood. These blocks can also be chilled and used to serve cold items.

- *In July 2016, Naturiffic Salts announced three distinct salts at the 'Elk Grove Red' & 'White and Blue Festival' - Garlicky Lemon Gourmet salt, Gingery Orange Gourmet Salts, and Peppery Lime Gourmet Salt.*
- *In June 2013, the Cornstore Group—a popular restaurant in Ireland—launched a summer seafood and cocktail collection that includes whole baked fish wrapped in seaweed and fresh herbs on ice with Himalayan salt and lemon juice*
- *In April 2013, WorldNow and KLTV—popular media platforms—published an article posted by Stephanie Frazier about Sweet Gourmet recommending Himalayan pink salt block for seafood grilling to achieve the perfect taste*

**Sauces and Savory:** Sauces and savoury manufactures are using gourmet sea salts in addition to table salt to add extra crunch, crisp and citrus taste. Crushed sea salt flakes are used in sauces, salsas, soups and marinades

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- In March 2019, the chef at Empellon restaurant had launched the Margaritas with six to eight different flavors, and the famous one is Strawberry Salt: Strawberry Margaritas.
- In Sep. 2015, Food and Beverage magazine, covered article about launch of soy ginger by Snikiddy exclusively at Kroger. The snacks options offered are includes sea salt, Italian her and olive oil and sea salt and lime.
- In Aug. 2015, Huffman launched Bloody Mary ketchup and expanded it's sauces product portfolio, as consumers are searching product containing quality ingredient, the company is launching new range of sauces using high grade ingredients, fermented vinegar, sea salt and natural ingredients.
- In July 2015, Primizie, the creator of thick cut chef-inspired crispbreads, introduced unique food product as on-the-go treat by launch of sweet snack crisps, Dolce Caramel and Italian Sweet Cream. This is perfect savory snacks.

**Desserts and Frozen Food:** Salt is used as a preservative in frozen food products. With increasing consumer inclination towards healthy and low sodium food, frozen food manufacturers are focused towards use of alternative preservatives such as gourmet salts, which have lower sodium content than conventional salt and also impart a unique taste to the food product.

- In October 2013, Connoisseur—a gourmet ice cream brand based in Australia—expanded its premium ice-cream range through introduction of a new on the stick range available in five exotic flavors, namely, Madagascan Vanilla, Murray River Salted Caramel with Macadamia, Kangaroo Island Honey with Pistachio, Sumatran Coconut and Cookies and Cream

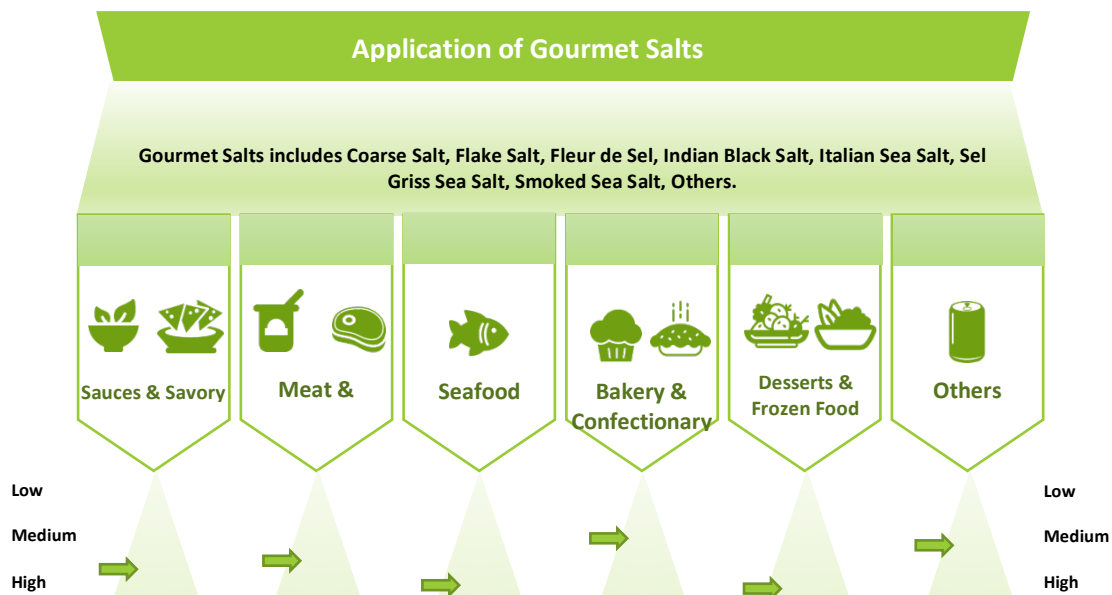


Fig. 8– Application of gourmet salts





### 3.4 Global Gourmet Salts Market Demand

The revenue from the global Gourmet Salts market is US\$ 2,339.2 Mn in 2019, and is expected to reach US\$ 3,752.2 Mn by the end of 2029. Sales revenue is expected to register a CAGR of 4.8% over the forecast period (2019–2029). Volume of the global Gourmet Salts market is 52,857 Tons in 2019, and is expected to reach 75,363 Tons by the end of 2029. In terms of volume, the market is expected to register a CAGR of 3.6% over the forecast period (2019–2029). We can see data on figures 9 & 10.

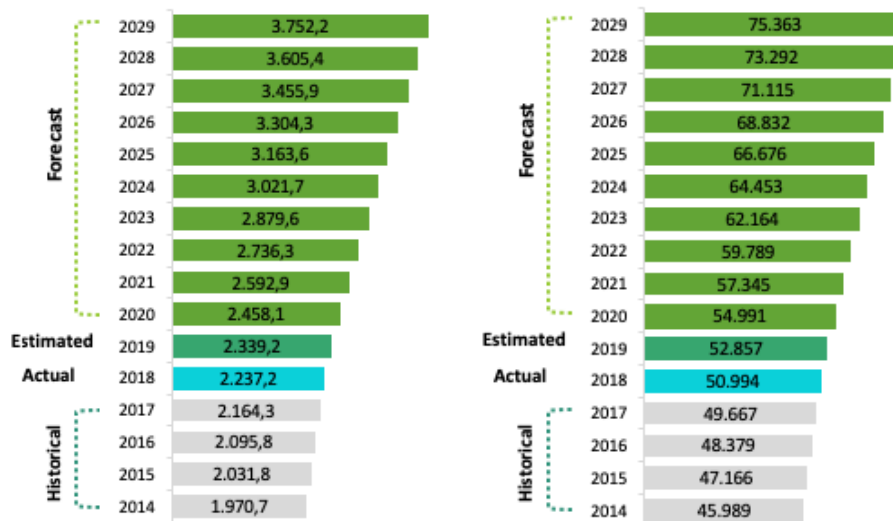


Fig. 9– Global gourmet salts market value/volume

Figures indicate the global Gourmet Salts market value (US\$ Mn) and Volume (Tons) between 2014 and 2029

The global Gourmet Salts market is estimated to create an absolute opportunity of US\$ 101.9 Mn by the end of 2019 over 2018, and represent an incremental opportunity of US\$ 1,413.0 Mn between 2019 and 2029.

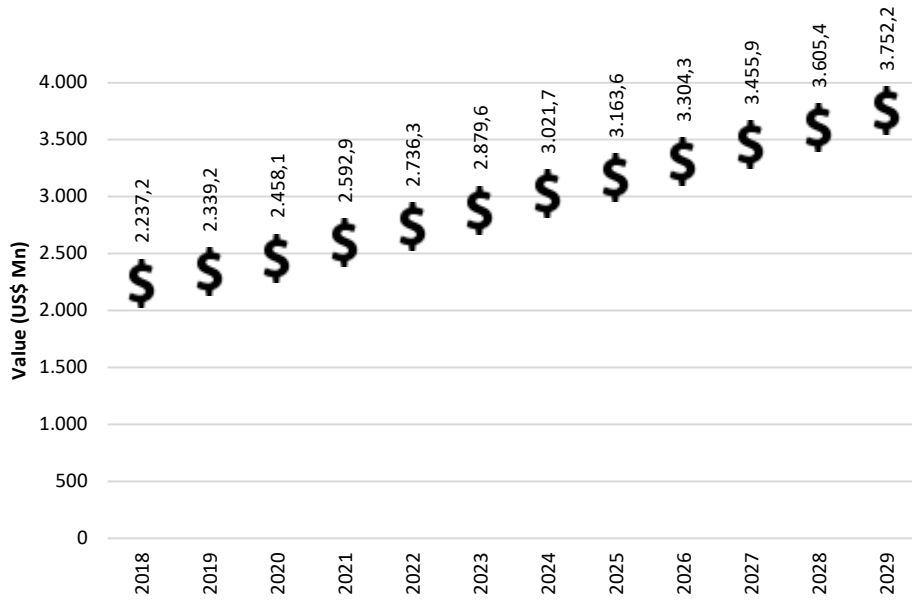


Fig. 10– Global gourmet salts market value forecast 2029

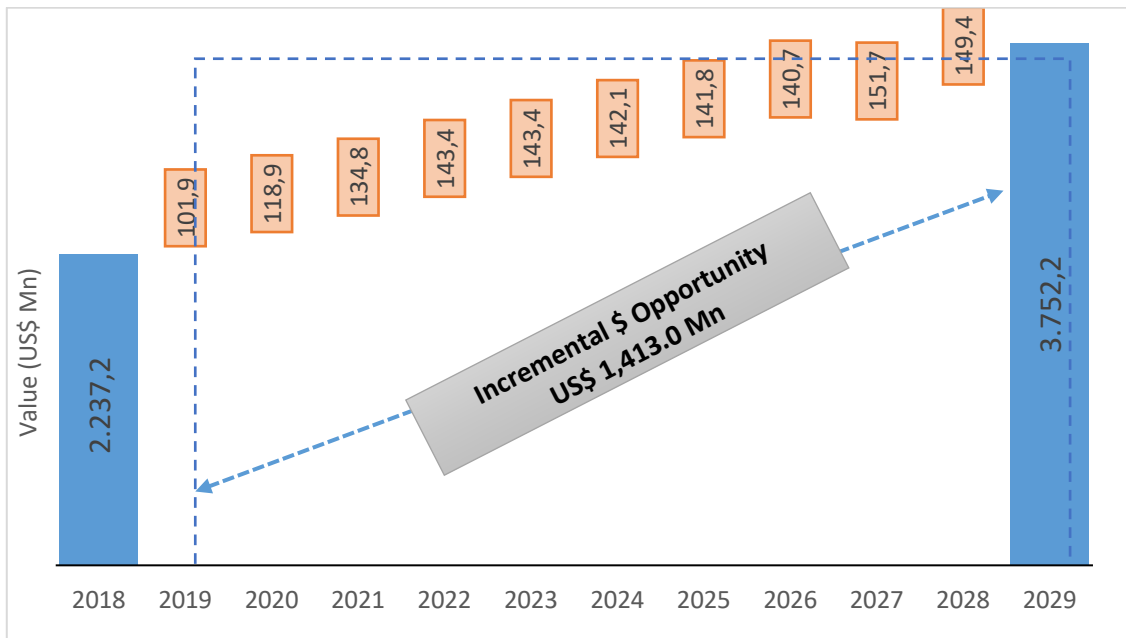


Fig. 11– Global gourmet salts market volume forecast 2029



### 3.5 Global Gourmet Salts Market Pricing Analysis

Pricing analysis is made by product type and regions. Value is considered on US\$ /Ton. For representing, prices are derived through weighted average method based on quotations from numbers of suppliers, distributors, and manufacturers (pricing varies based on sourcing method, contracts with company, business relationship with company, quantities to be purchased, and payment mode etc.) and also at manufacturer level FoB (Free on Board) prices.

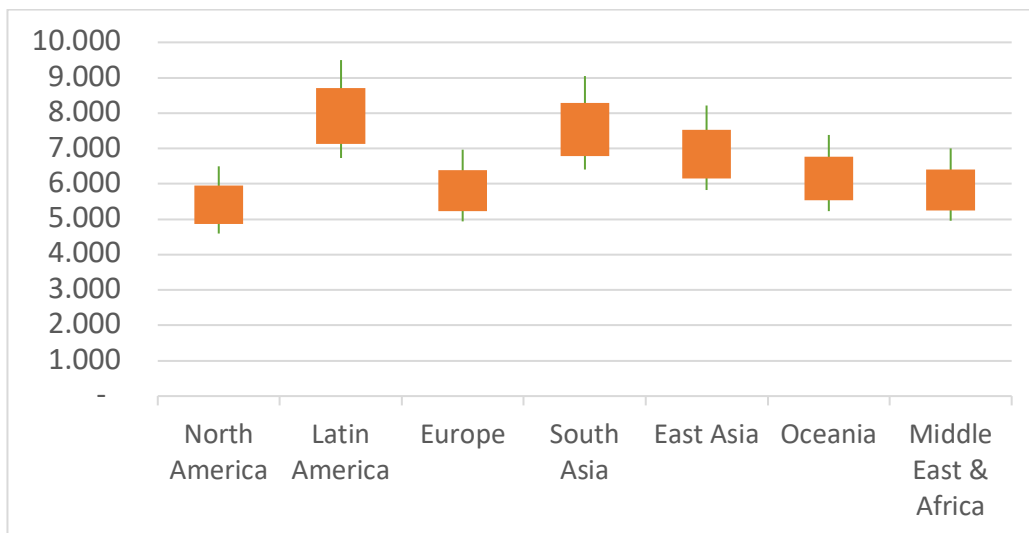


Fig. 12– Coarse Salt average prices (US\$/Ton)

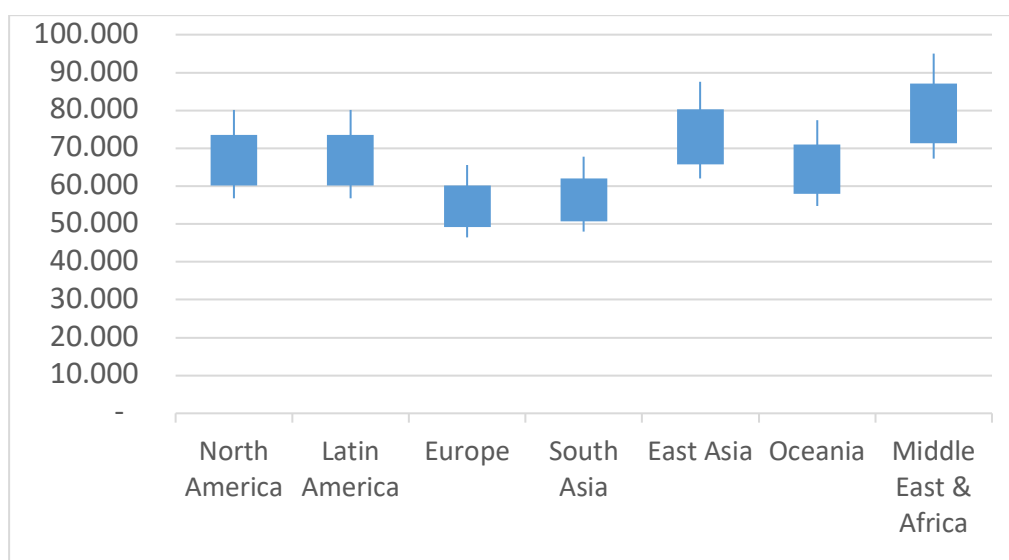


Fig. 13– Flake Salt average prices (US\$/Ton)

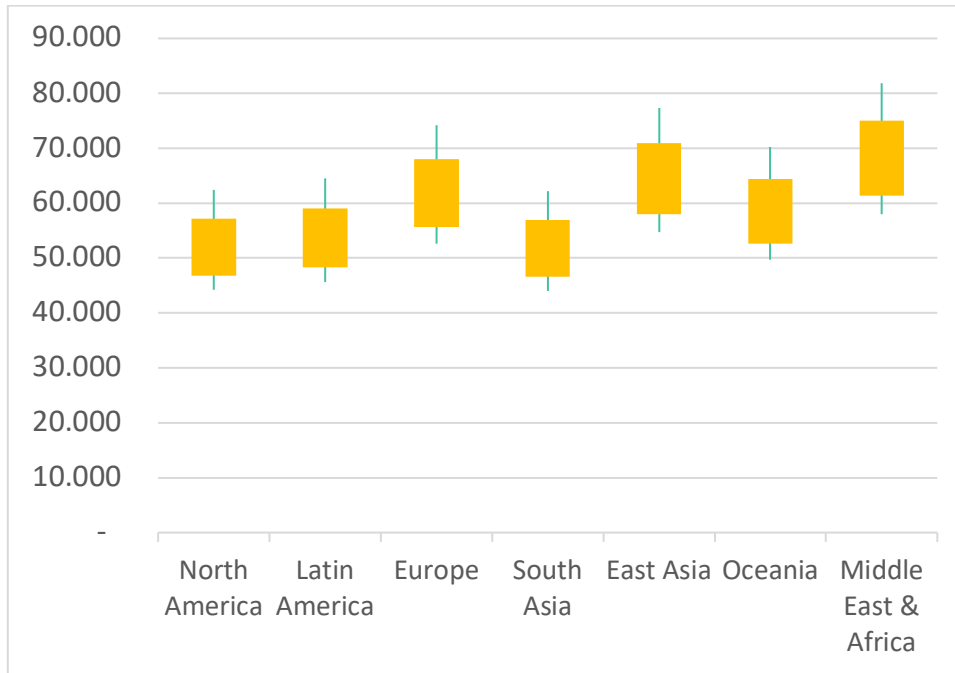


Fig. 14– Fleur de Sel average prices (US\$/Ton)

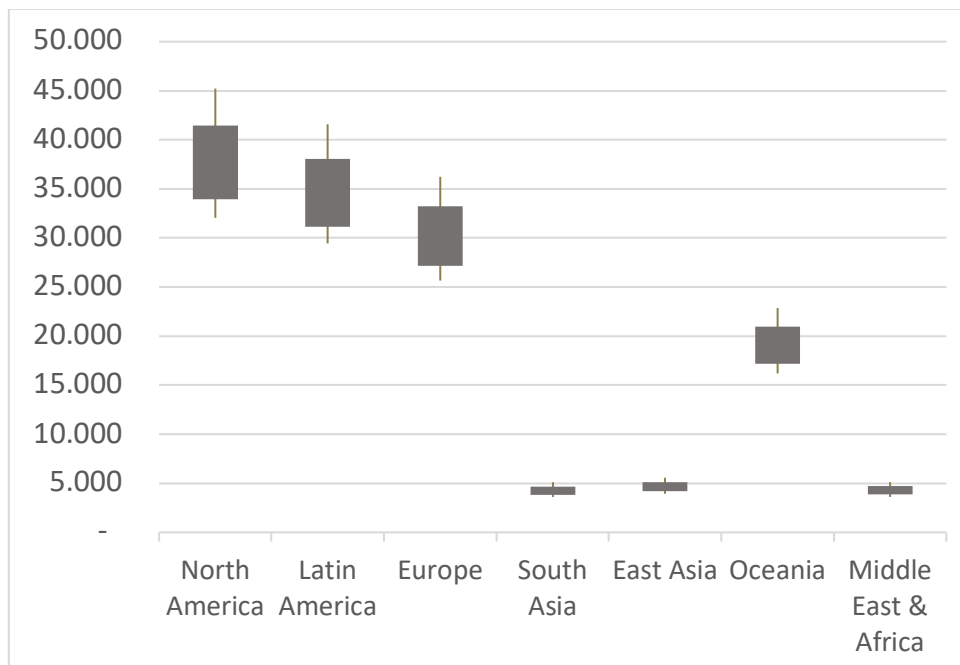


Fig. 15– Indian Black Salt average prices (US\$/Ton)

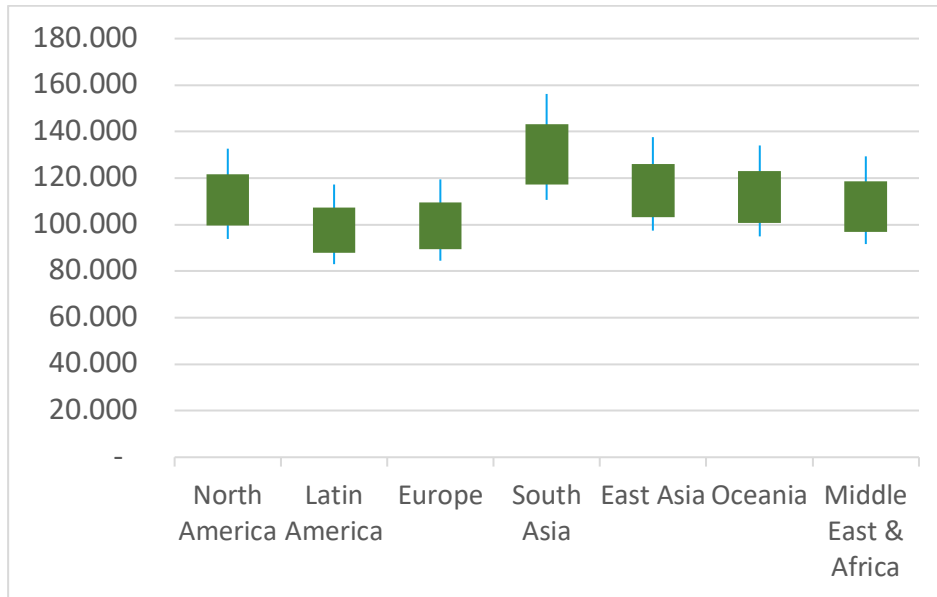


Fig. 16–Italian Black Salt average prices (US\$/Ton)

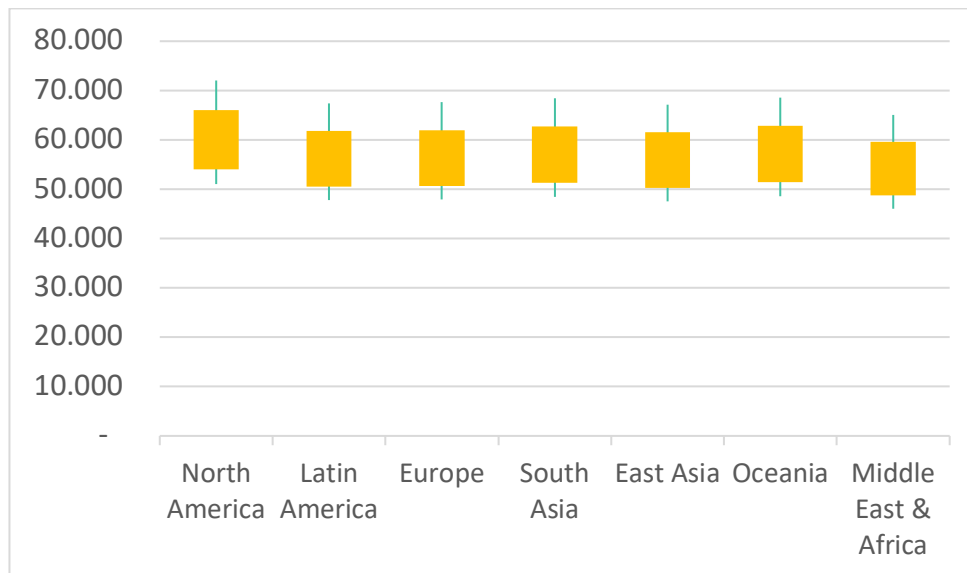


Fig. 17–Sel Griss Sea Salt average prices (US\$/Ton)

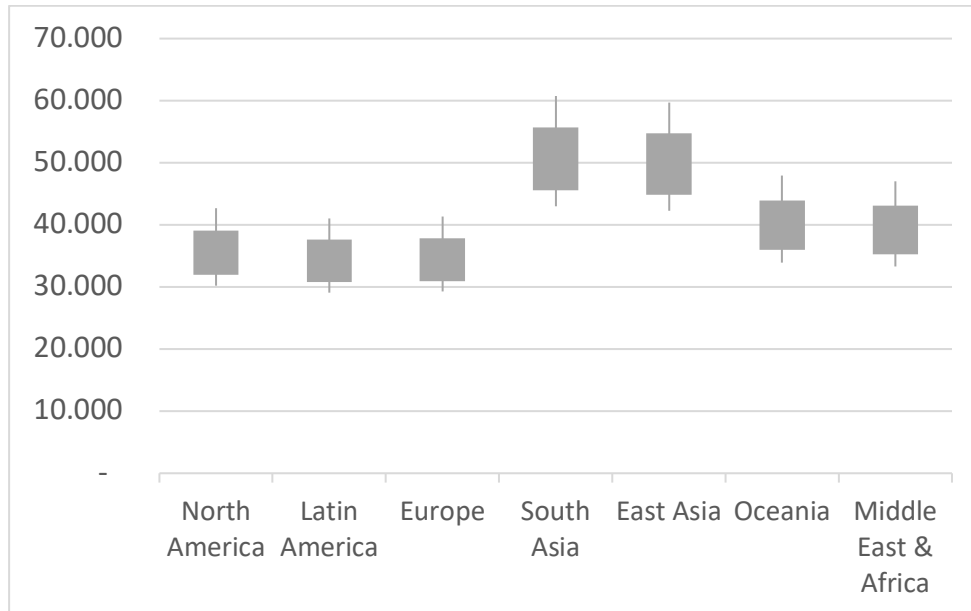


Fig. 18–Smoked Sea Salt average prices (US\$/Ton)



## 3.6 Market Background

### 3.6.1 Macroeconomic factors

#### GDP Growth – fairly low impact

- Globally, GDP growth has been stagnant in most prominent economies in the recent past. The advanced and matured economies of the world are expected to witness disparate recovery and growth over the next five years.
- Emerging and developing economies are expected to contribute significantly to global economic growth. Notably, the prominent economies of Southeast Asia, Latin America, and Eurasia are expected to witness gradual growth. Globally, GDP growth is expected to continue at a nominal rate over the next decade.

#### Urbanization – high impact on the target market

- As of 2018, approximately 54% of the global population lived in urban areas, and this share is expected to cross 65% by 2050. Owing to employment prospects, migration of working population to tier-I cities is further expected to bolster the urbanization trend across the globe. Notably, urbanization in Asian countries is expected to grow at a faster pace.
- Increased urbanization leads to exposure and awareness about essential food ingredients for a healthy lifestyle pattern.

#### Per capita expenditure – high impact on the target market

- Globally, per capita expenditure on food and beverages by the global population has witnessed an increase. The key reason behind increasing per capita consumption expenditure is willingness of the consumers to pay more for the premium food products. The consumers expenditure on the premium and exotic food has witnessed the substantial growth owing to the fine quality and extraordinary feel of the premium and exotic food. Thus the increasing per capita expenditure on the premium food products and exotic food is driving the growth of global gourmet salt market.

#### Retail sales – moderate impact

- The global retail sales sector is becoming more organized, and it is expected to increase across various domains of consumer products. Expansion of global retail chains, both, physically and digitally, along with increasing product lines and product portfolios are expected to further drive the growth of the salt products including (gourmet salts )market.

### 3.6.2 Global food and beverage sector outlook

The food & beverage industry in North America is colossal and comprises a number of players competing in largely fragmented and multi-tiered supply chains. The industry is stringently regulated and players often have to adapt to a landscape that changes quite frequently. The primary demand drivers in North America are witnessing face-paced evolution, as dietary habits receive emphasis, especially among consumers who scour every label to read the ingredients.

Asia Pacific (APAC) remains one of the most prominent markets for food and beverage manufacturers globally. The region is home to the world's leading food producers, importers, and exporters. Opportunities galore as the region is also home to some of the world's most populous countries. Satisfying the growing and evolving needs of such a large consumer base will entail new solutions.

The global trends related to healthy, organic, and natural are also being witnessed in APAC's food and beverage sector, and manufacturers with a diverse portfolio have an increasing likelihood of succeeding in this marketplace. The evolving tastes and preferences of consumers are not lost on manufacturers, as offerings have been broadened to accommodate organic and natural food products. Many established players are focusing on acquiring smaller companies which have the expertise and reputation of being pros in specific organic and natural domains. These smaller companies have deep brand loyalty, and owing to the



small scale of production, it is much easier for them to come up with innovative products. These factors, combined with increasing emphasis on organic and natural, are likely to make smaller companies attractive targets for mergers and acquisitions.

In Europe, notable developments that the food and beverage industry needs to lookout for are stricter monitoring of unfair trade practices (UTPs) by the European Commission (EC). Many food and beverage manufacturers are currently assessing the risk to business due to concerns of Brexit. Food and beverage companies are focusing on take preventive action to secure their business interests.

### 3.6.3 Industry overview

The global food and beverages market is estimated to grow from around US\$ 13.9 trillion in 2016 to US\$ 16 trillion by 2020, representing an annual growth rate of 3.6%. The U.S. food and beverage industry is growing at a steady pace. The industry is also expanding rapidly in terms of number of companies and number of products. Japan is valued among the top five markets for baked good and is the second largest in the Asia Pacific with an increasing demand for bakery products. Approximately 60% Europeans consume functional food, with women consuming higher amount of functional drinks. Growing wellness trends across Brazil has elevated per capita consumption of flavored and functional water. Organic milk in Australia and New Zealand have picked up high demand. Flavored beverages are estimated to witness the highest growth rate of over ~7%

### 3.6.4 Processed food market overview

With increase in urbanization, demand for processed and packaged food and beverages is anticipated to increase globally. Growth in GDP at 3.5% surpasses population growth of 1.2% (CAGR 2017-30), however the overall consumer expenditure on food and beverages is set to drop from 8.6% of GDP to 8.1% by 2030 as products will become comparatively more affordable and will make up a lesser proportion of overall consumer expenditure.

Young population located in urban areas of either Middle East, Africa, Asia Pacific or Latin America will be prominent consumers of the future. This group is the fastest growing and largest provider to value sales growth with their increasing buying power and affection towards westernized, convenient and easy-to-prepare food and beverages.

Asia Pacific and Middle East and Africa are the major growing regions and contributor for the growth of processed food industry:

Middle East and Africa regions offers the peak level of prospective growth in food and beverage industry. These regions have high birth rates, rapidly escalating cities and growing employment. With greater wealth, increasing economic and political stability and fast developing infrastructure, consumers have greater access to a broader range of foods and beverages.

In spite of lower growth rates across Asia Pacific, the size of the population and per capita disposable income growth across the region offers an alluring growth market in all categories.

### 3.6.5 Opportunities in global food and beverage industry

Most important opportunities may be: Differentiate with clear, credible, and transparent labelling to lure health-conscious demographics; Developing affordable product lines for low-income and middle class population; Increasing demand for natural ingredients, additive-free or lack of artificial ingredients products; Demand for on-the-go, ready-to-eat, ready-to-drink, quick cook, easy to prepare, ready-to-cook, convenience foods to meet ever increasing demand of busy consumers; Innovative packaging and development of smart packaging to ensure freshness, quality, portability, and design to attract customers; Consumer preference



## MedArtSal

for packaged and convenience foods; Convenient form of packaging, portable size or products that are easy to consumer and carry; Competitive advantage through ethical and sustainable farming.

### 3.6.6 Industry value and supply chain

Supply chain is an important factor to get margin, depending on your position may vary from 15/20% for retailers to 33/40% for dealers.

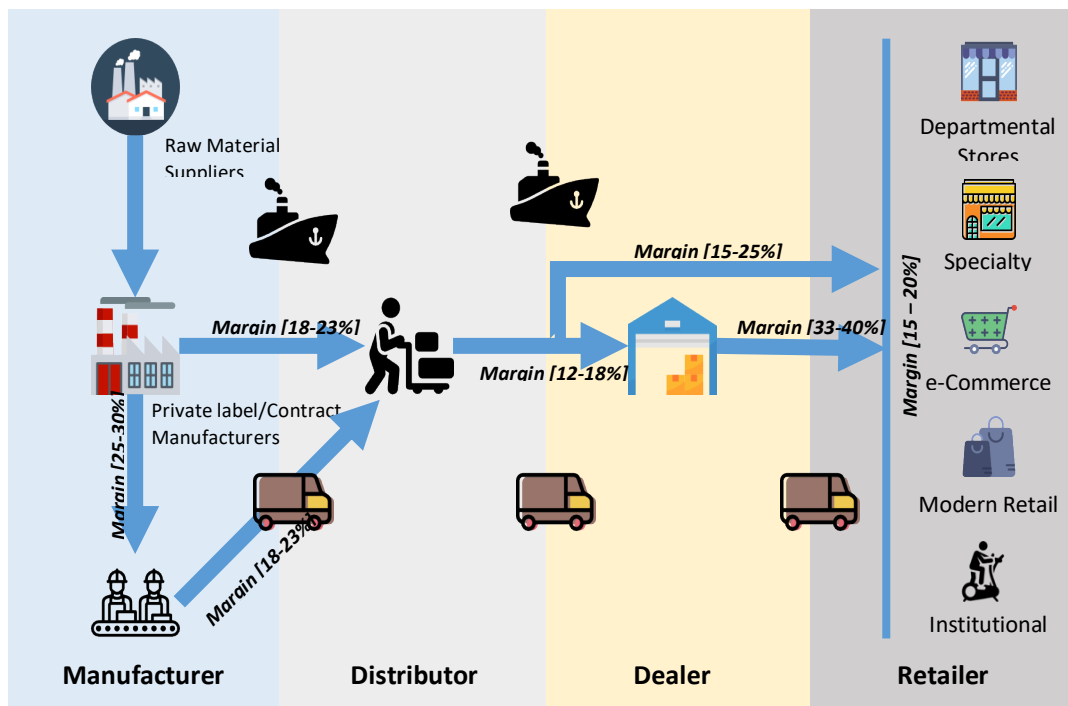


Fig. 19–Salt value chain supply

### 3.6.7 Factors effecting the prices

Price difference due to different matter states. Each Application of Gourmet Salts requires different features and properties. Prices of each type vary according to the state of its matter

Price difference due to import trends. The varying import trend is one of the major factors for the price difference amongst various countries. One of the major factors that affects the prices of goods are the differences in taxes and import duties across countries.

### 3.6.8 Market Dynamics

Salt market is quite dynamic on evolution. Some of the most important items on last years consider the following ideas:

#### Launch of next-generation gourmet salt



- Gourmet salts are an exotic range of salts that are used in many food preparations. Companies are now focusing on new generation unique and natural gourmet salts, which can be used for the specific taste or specific texture of food. Salt producers are developing and launching new products as the demand for a variety of gourmet salts is rising.
  - *In September 2017, Churchfield Saltworks launched Droitwich salt, a 100% natural and pure gourmet salt, at the 'Ludlow Food Festival' in the U.K. This salt is made from brine spring, which is crystal clear and ten times saltier than seawater. It is believed that salt from brine springs is the purest salt and 100% natural.*

### Increasing use of Gourmet salt in exotic food preparations

- Gourmet salts come in a variety of forms, and are radically varied in flavor, appearance, and texture. These properties are being utilized to prepare a variety of foods, and used in food preservation as well. This gives a fine taste to the prepared food. Exotic food is the segment where food is prepared from tropical ingredients. Gourmet salts are one such exotic and tropical ingredient. This provides the food a particular taste and texture as well. The demand for exotic food in restaurants is increasing globally, which is influencing the demand for gourmet salt. This demand is expected to grow with the growth of the gourmet salt industry.

### Greater Spending on Fine Food and Beverages

- Consumers want the best quality food, and for that, the best quality ingredients are needed. They believe that gourmet salt is a better ingredient than regular table salt. The demand for exotic food and sophisticated dining is increasing among consumers, due to change in lifestyle and disposable income has been increased over the years. Hence, consumers are ready to spend more on exotic food and sophisticated dining. This is expected to boost the demand for gourmet salt.

### Increasing Demand for Organic Ingredients

- People are becoming more aware of the harmful effects of chemically-processed ingredients and food. Consumers are now more health conscious, and spend more on organic food and ingredients. Gourmet salt also has more of a natural and healthy image in the minds of consumers than traditional table salt. Gourmet salt is an organic ingredient, which has low sodium content and high mineral presence in its natural form. The demand for such an organic ingredient is increasing, and this is expected to boost the growth of the gourmet salt market.

### Influx of Low-quality Himalayan Pink Salt

- As the popularity and consumer demand for Himalayan salt is increasing, many suppliers who are new or unfamiliar with the salt industry are responding with low-quality Himalayan salt. These suppliers have already introduced poorly processed mineral salts that may contain repulsive and potentially harmful insoluble materials.
  - *In April 2017, the CEO of SaltWorks, Mr. Mark Zoske, warned all suppliers and consumers that, poorly processed and low-cost Himalayan pink salt is now available, which is damaging the salt industry's reputation, and putting consumer safety and satisfaction at risk.*

### High Cost of Himalayan Salt and Other Gourmet Salts



- The cost of Himalayan salt and other gourmet salts is higher than traditional table salt. This is due to the different processing methods that are used to obtain a variety of high-quality gourmet salts. The price of gourmet salt is dependent upon the availability of the salt, extraction cost, and processing cost. Himalayan salt and other gourmet rock and sea salts can cost two to 30 times more than standard salt.

### Introduction of New Salted Dark Confectionery Products

- Gourmet salt has a variety of applications in the confectionary industry. The leading suppliers of gourmet salts are innovating new products using chocolates. The new trending products that use gourmet salt and chocolate are salted chocolate sauce and salted chocolate bars. These products are manufactured using gourmet salt flakes and dark chocolate. This chocolate sauce can be used to jazz up desserts or can be drizzled on ice cream or fresh fruits.
  - *For the development of new products using gourmet salt, Murray River Salts has collaborated with Mildura Chocolate Co., and developed two new products - Salted Chocolate Sauce and Salted Chocolate Bars, by using a combination of dark chocolates and gourmet salt.*

### Gourmet Cooking Salts

- The exotic food industry is always in need of new flavored gourmet salts to enhance the flavor and texture of food. The demand for dressing and seasoning products is continuously increasing, and hence, suppliers are now developing new Naturiffic gourmet cooking salts (hand harvested Sicilian sea salt). These are hand harvested, unrefined, and artisanal sea salts, which are suitable for cooking, grilling, and finishing.
  - *Naturiffic Salts announced three distinct salts at the 'Elk Grove Red' & 'White and Blue Festival' - Garlicky Lemon Gourmet salt, Gingery Orange Gourmet Salts, and Peppery Lime Gourmet Salt.*

## 3.7 Global Gourmet Salts Market Analysis and Forecast

In the next pages figures we represented a resume of the market and forecast for next years (2019-2029). Most important data is presented by type of salt, end uses and regions.

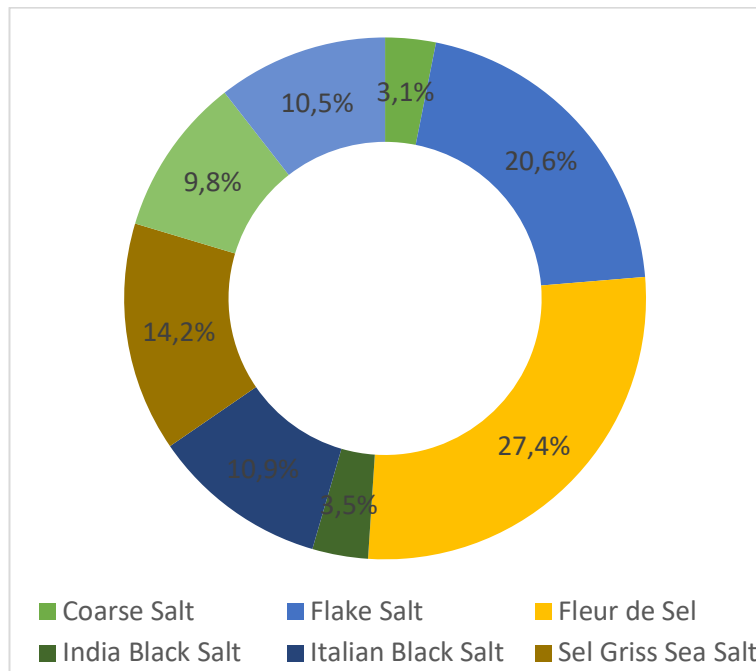


Fig. 20–Global gourmet Salts Market Value Share Analysis by Product Type (2019)

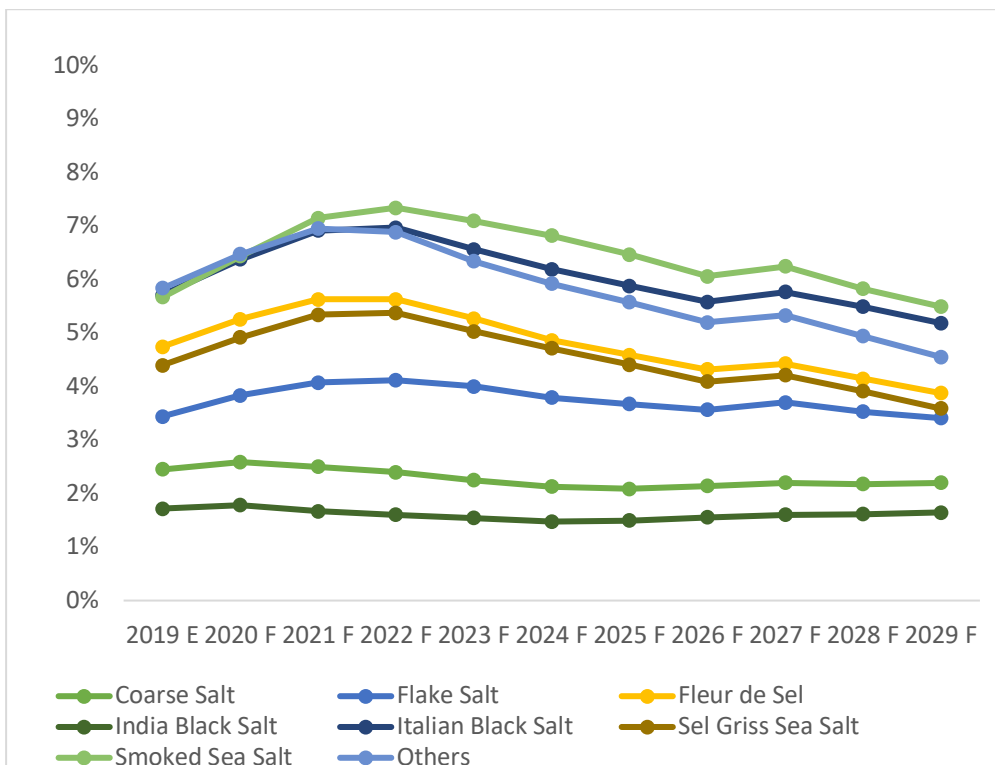


Fig. 21–Global gourmet Salts Market Y-o-Y Growth rate by Product Type (2019-2029)

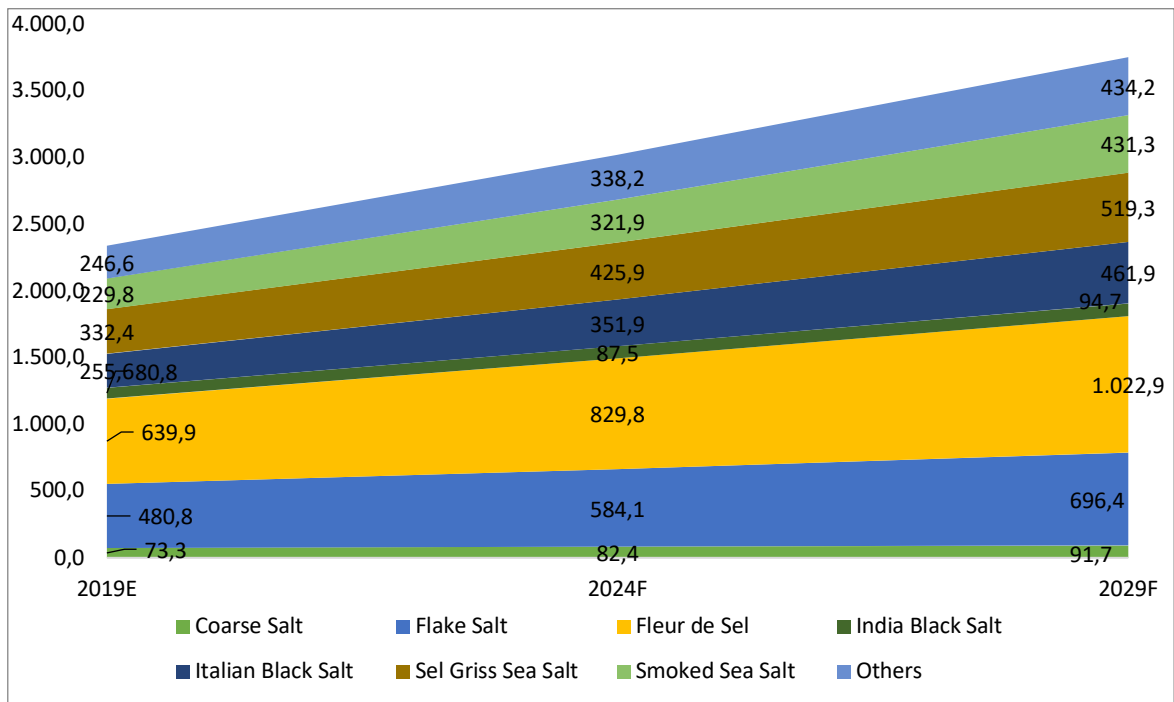


Fig. 22- Global Gourmet Salts Market Value (US\$ Mn) Analysis & Forecast by Product Type, 2019–2029

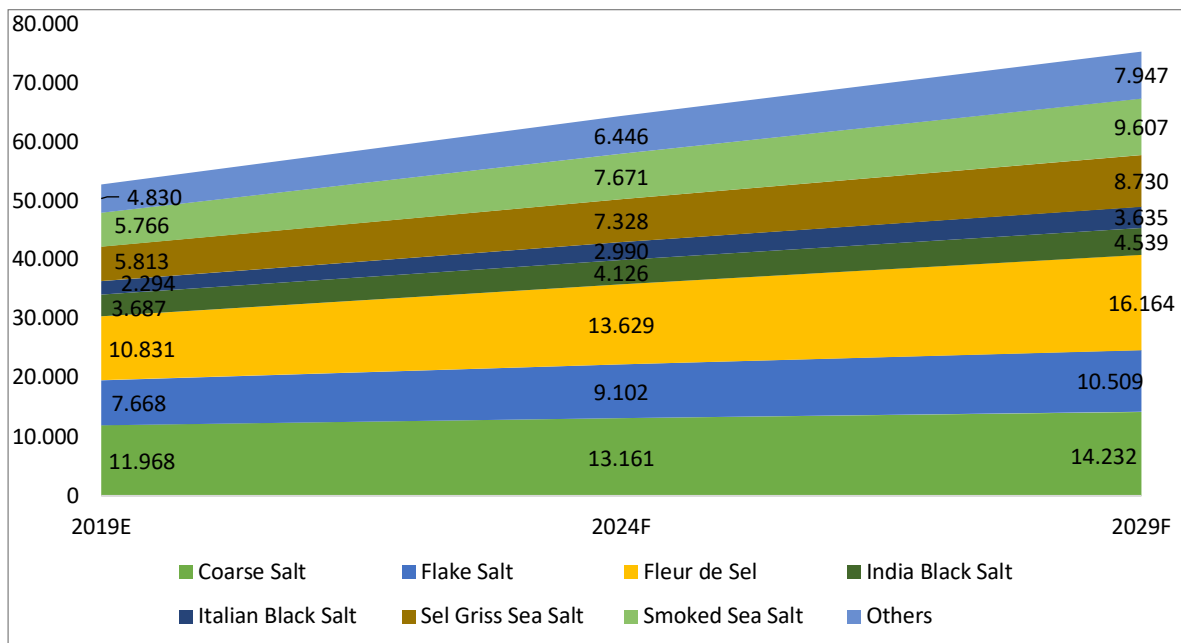


Fig. 23-Global Gourmet Salts Market Volume (Tons) Analysis & Forecast by Product Type, 2019–2029

| End Use                   | 2014 H         | 2015 H         | 2016 H         | 2017 H         | 2018 H         | 2019 E         | 2020 F         | 2021 F         | 2022 F         | 2023 F         | 2024 F         | 2025 F         | 2026 F         | 2027 F         | 2028 F         | 2029 F         | CAGR (2019–2029) |
|---------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------|
| <b>Coarse Salt</b>        | 66.6           | 67.7           | 68.9           | 70.2           | 71.5           | 73.3           | 75.2           | 77.0           | 78.9           | 80.7           | 82.4           | 84.1           | 85.9           | 87.8           | 89.7           | 91.7           | <b>2.3%</b>      |
| <b>Flake Salt</b>         | 421.8          | 431.8          | 442.1          | 453.1          | 464.8          | 480.8          | 499.3          | 519.6          | 541.1          | 562.7          | 584.1          | 605.6          | 627.2          | 650.4          | 673.4          | 696.4          | <b>3.8%</b>      |
| <b>Fleur de Sel</b>       | 535.0          | 552.4          | 570.7          | 590.2          | 610.9          | 639.9          | 673.6          | 711.5          | 751.6          | 791.3          | 829.8          | 867.9          | 905.4          | 945.5          | 984.7          | 1,022.9        | <b>4.8%</b>      |
| <b>India Black Salt</b>   | 75.5           | 76.4           | 77.3           | 78.3           | 79.4           | 80.8           | 82.2           | 83.6           | 84.9           | 86.2           | 87.5           | 88.8           | 90.2           | 91.6           | 93.1           | 94.7           | <b>1.6%</b>      |
| <b>Italian Black Salt</b> | 206.5          | 214.4          | 222.9          | 232.0          | 241.7          | 255.6          | 271.9          | 290.7          | 311.0          | 331.4          | 351.9          | 372.6          | 393.5          | 416.2          | 439.1          | 461.9          | <b>6.1%</b>      |
| <b>Sel Griss Sea Salt</b> | 281.6          | 290.1          | 299.0          | 308.5          | 318.4          | 332.4          | 348.8          | 367.4          | 387.2          | 406.7          | 425.9          | 444.7          | 462.9          | 482.4          | 501.3          | 519.3          | <b>4.6%</b>      |
| <b>Smoked Sea Salt</b>    | 185.9          | 193.0          | 200.6          | 208.7          | 217.4          | 229.8          | 244.6          | 262.1          | 281.4          | 301.3          | 321.9          | 342.8          | 363.6          | 386.3          | 408.8          | 431.3          | <b>6.5%</b>      |
| <b>Others</b>             | 197.9          | 205.9          | 214.4          | 223.4          | 233.0          | 246.6          | 262.6          | 280.9          | 300.2          | 319.3          | 338.2          | 357.1          | 375.7          | 395.7          | 415.3          | 434.2          | <b>5.8%</b>      |
| <b>Total</b>              | <b>1,970.7</b> | <b>2,031.8</b> | <b>2,095.8</b> | <b>2,164.3</b> | <b>2,237.2</b> | <b>2,339.2</b> | <b>2,458.1</b> | <b>2,592.9</b> | <b>2,736.3</b> | <b>2,879.6</b> | <b>3,021.7</b> | <b>3,163.6</b> | <b>3,304.3</b> | <b>3,455.9</b> | <b>3,605.4</b> | <b>3,752.2</b> | <b>4.8%</b>      |

Table 1 - Global Gourmet Salts Market Value (US\$ Mn) Analysis and Forecast by Product Type, 2014–2029

| End Use                   | 2014 H        | 2015 H        | 2016 H        | 2017 H        | 2018 H        | 2019 E        | 2020 F        | 2021 F        | 2022 F        | 2023 F        | 2024 F        | 2025 F        | 2026 F        | 2027 F        | 2028 F        | 2029 F        | CAGR (2019–2029) |
|---------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------------|
| <b>Coarse Salt</b>        | 11,018        | 11,188        | 11,360        | 11,540        | 11,723        | 11,968        | 12,230        | 12,483        | 12,726        | 12,950        | 13,161        | 13,366        | 13,578        | 13,797        | 14,014        | 14,232        | <b>1.7%</b>      |
| <b>Flake Salt</b>         | 6,796         | 6,946         | 7,100         | 7,265         | 7,434         | 7,668         | 7,934         | 8,222         | 8,522         | 8,817         | 9,102         | 9,382         | 9,658         | 9,951         | 10,233        | 10,509        | <b>3.2%</b>      |
| <b>Fleur de Sel</b>       | 9,211         | 9,487         | 9,773         | 10,076        | 10,388        | 10,831        | 11,342        | 11,913        | 12,508        | 13,083        | 13,629        | 14,154        | 14,658        | 15,189        | 15,692        | 16,164        | <b>4.1%</b>      |
| <b>India Black Salt</b>   | 3,359         | 3,417         | 3,475         | 3,537         | 3,601         | 3,687         | 3,780         | 3,871         | 3,961         | 4,045         | 4,126         | 4,206         | 4,287         | 4,372         | 4,456         | 4,539         | <b>2.1%</b>      |
| <b>Italian Black Salt</b> | 1,908         | 1,973         | 2,041         | 2,113         | 2,188         | 2,294         | 2,418         | 2,559         | 2,707         | 2,851         | 2,990         | 3,124         | 3,251         | 3,387         | 3,516         | 3,635         | <b>4.7%</b>      |
| <b>Sel Griss Sea Salt</b> | 4,968         | 5,111         | 5,260         | 5,418         | 5,581         | 5,813         | 6,083         | 6,390         | 6,712         | 7,025         | 7,328         | 7,621         | 7,898         | 8,193         | 8,472         | 8,730         | <b>4.1%</b>      |
| <b>Smoked Sea Salt</b>    | 4,794         | 4,959         | 5,129         | 5,310         | 5,498         | 5,766         | 6,085         | 6,458         | 6,860         | 7,267         | 7,671         | 8,067         | 8,446         | 8,854         | 9,239         | 9,607         | <b>5.2%</b>      |
| <b>Others</b>             | 3,935         | 4,085         | 4,241         | 4,408         | 4,581         | 4,830         | 5,119         | 5,449         | 5,794         | 6,125         | 6,446         | 6,758         | 7,055         | 7,371         | 7,670         | 7,947         | <b>5.1%</b>      |
| <b>Total</b>              | <b>45,989</b> | <b>47,166</b> | <b>48,379</b> | <b>49,667</b> | <b>50,994</b> | <b>52,857</b> | <b>54,991</b> | <b>57,345</b> | <b>59,789</b> | <b>62,164</b> | <b>64,453</b> | <b>66,676</b> | <b>68,832</b> | <b>71,115</b> | <b>73,292</b> | <b>75,363</b> | <b>3.6%</b>      |

Table 2 - Global Gourmet Salts Market Volume (Tons) Analysis and Forecast by Product Type, 2014–2029

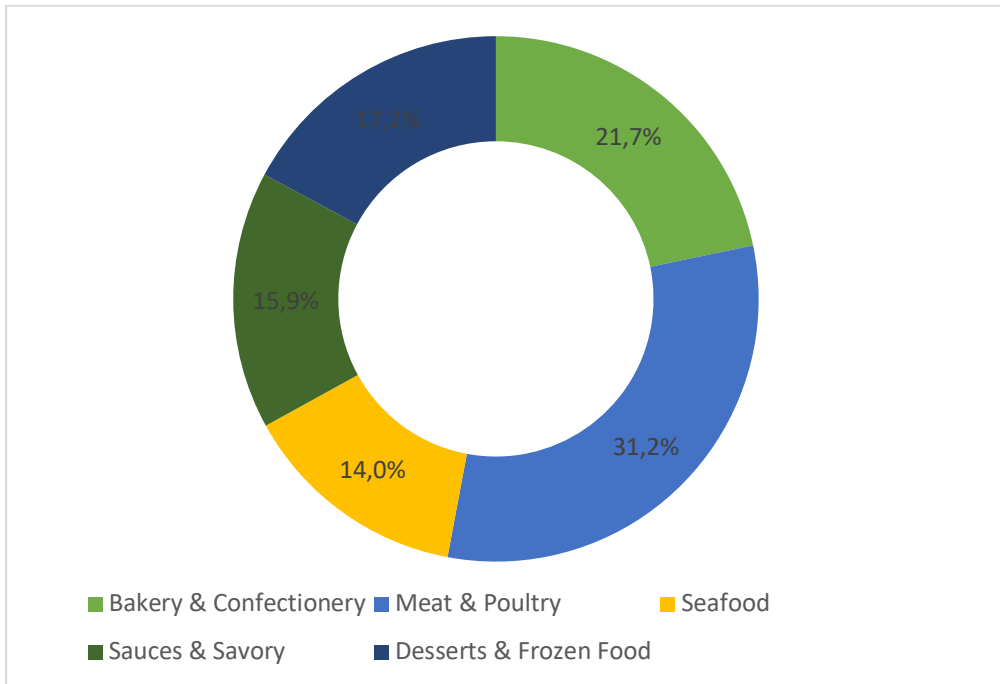


Figure 24. Global Gourmet Salts Market Value Share Analysis by End Use, 2019 E

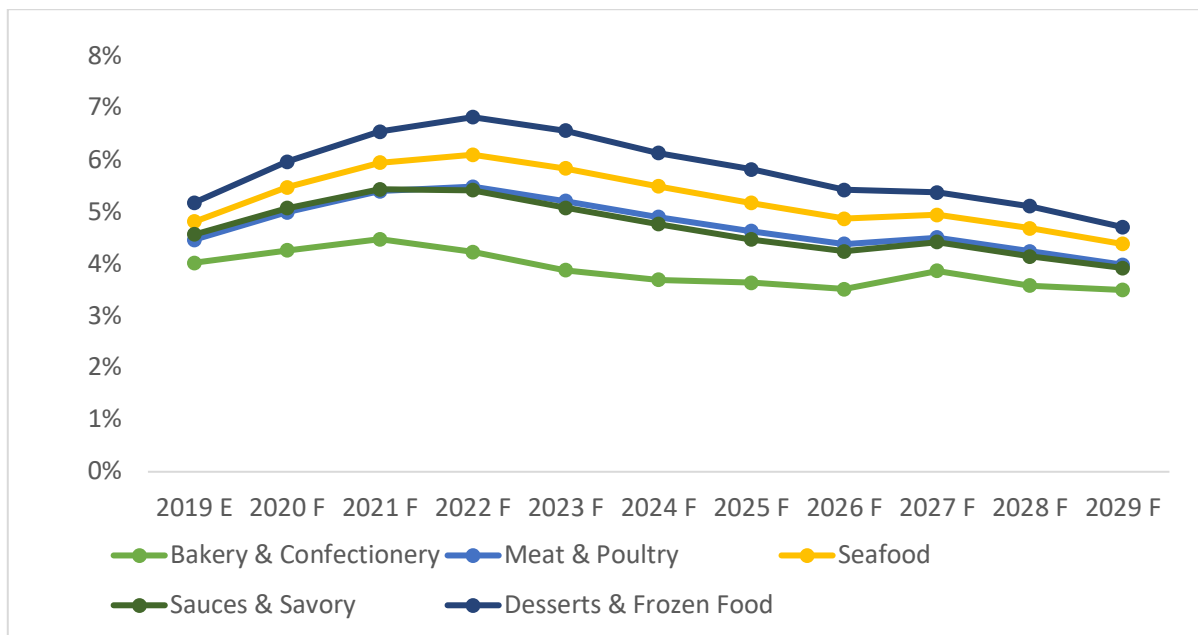


Figure 25. Global Gourmet Salts Market Y-o-Y Growth Rate by End Use, 2019–2029

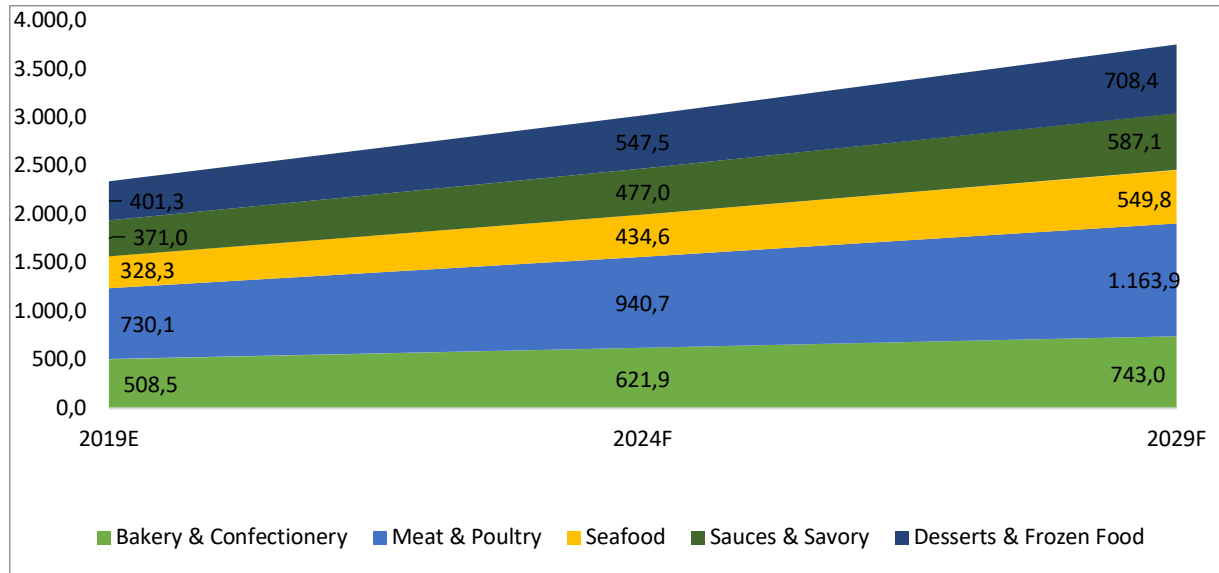


Figure 26. Global Gourmet Salts Market Value (US\$ Mn) Analysis & Forecast by End Use, 2019–2029

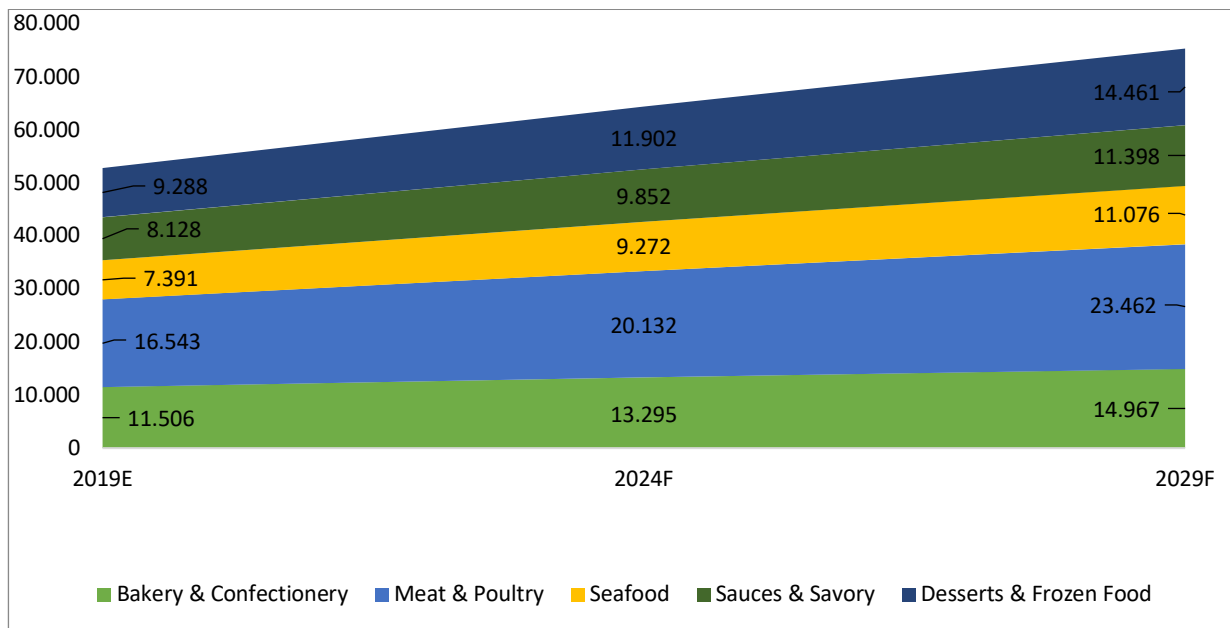


Figure 27. Global Gourmet Salts Market Volume (Tons) Analysis & Forecast by End Use, 2019–2029



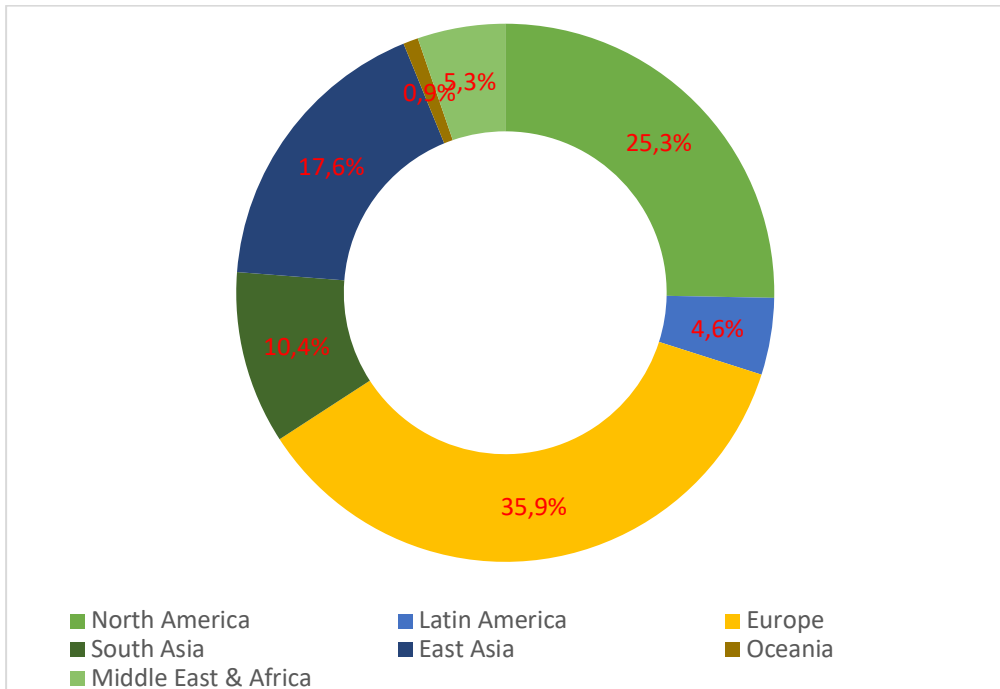


Figure 28. Global Gourmet Salts Market Value Share Analysis by Region, 2019 E

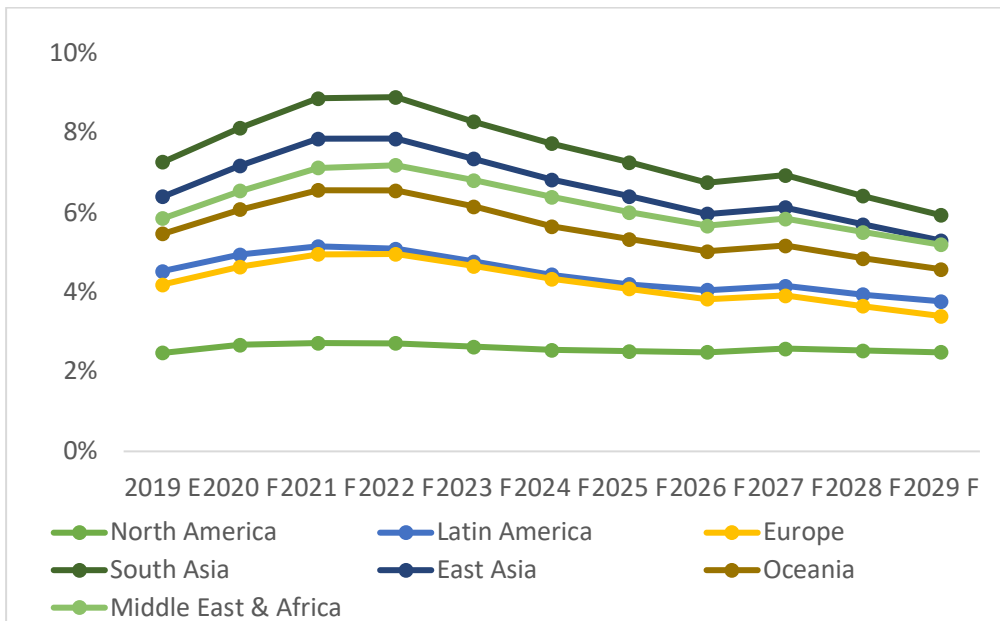


Figure 29. Global Gourmet Salts Market Y-o-Y Growth Rate by Region, 2019–2029

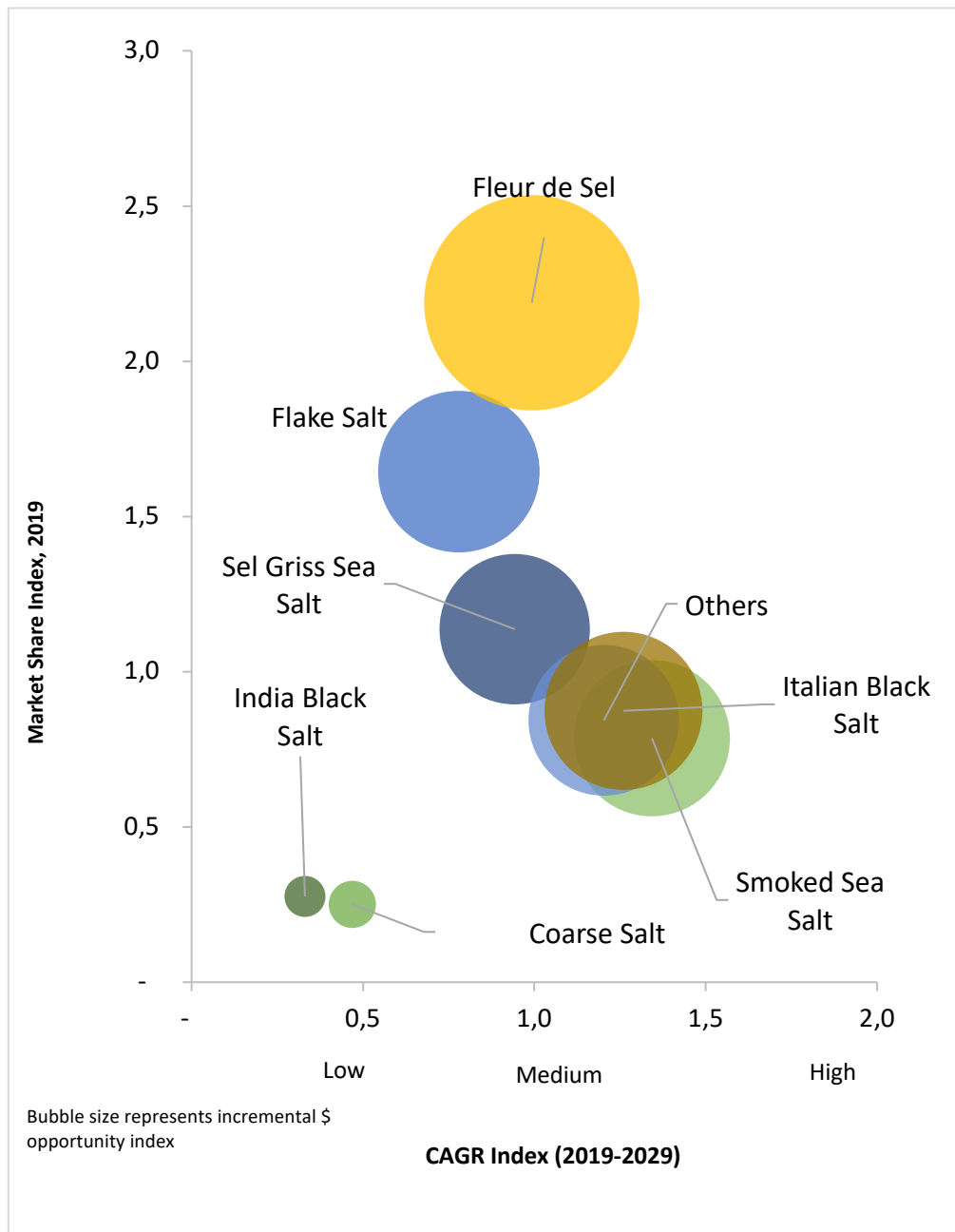


Figure 30. Global Gourmet Salts Market Attractiveness analysis by type, 2019-2029

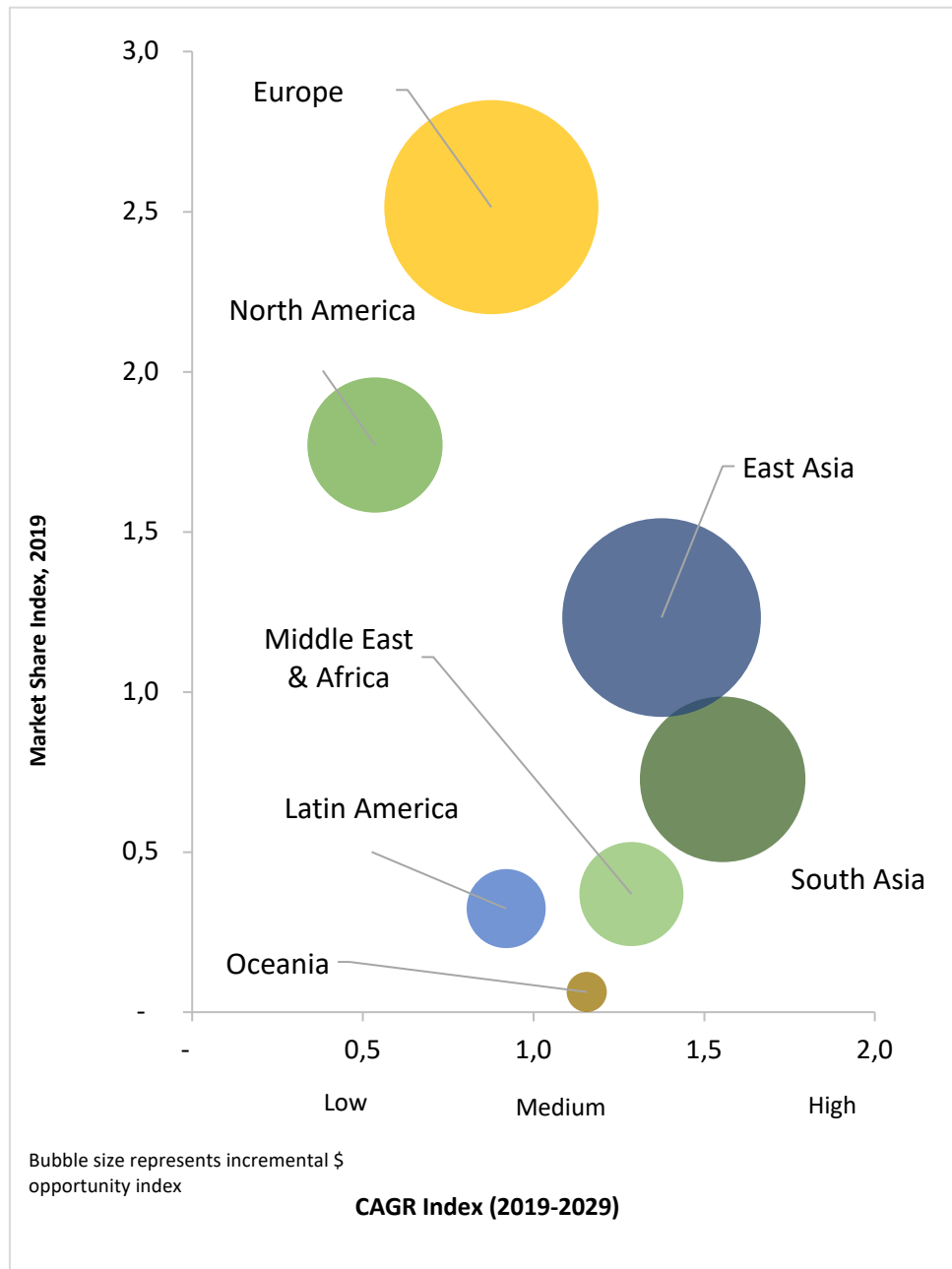


Figure 31. Global Gourmet Salts Market Attractiveness analysis by region, 2019-2029

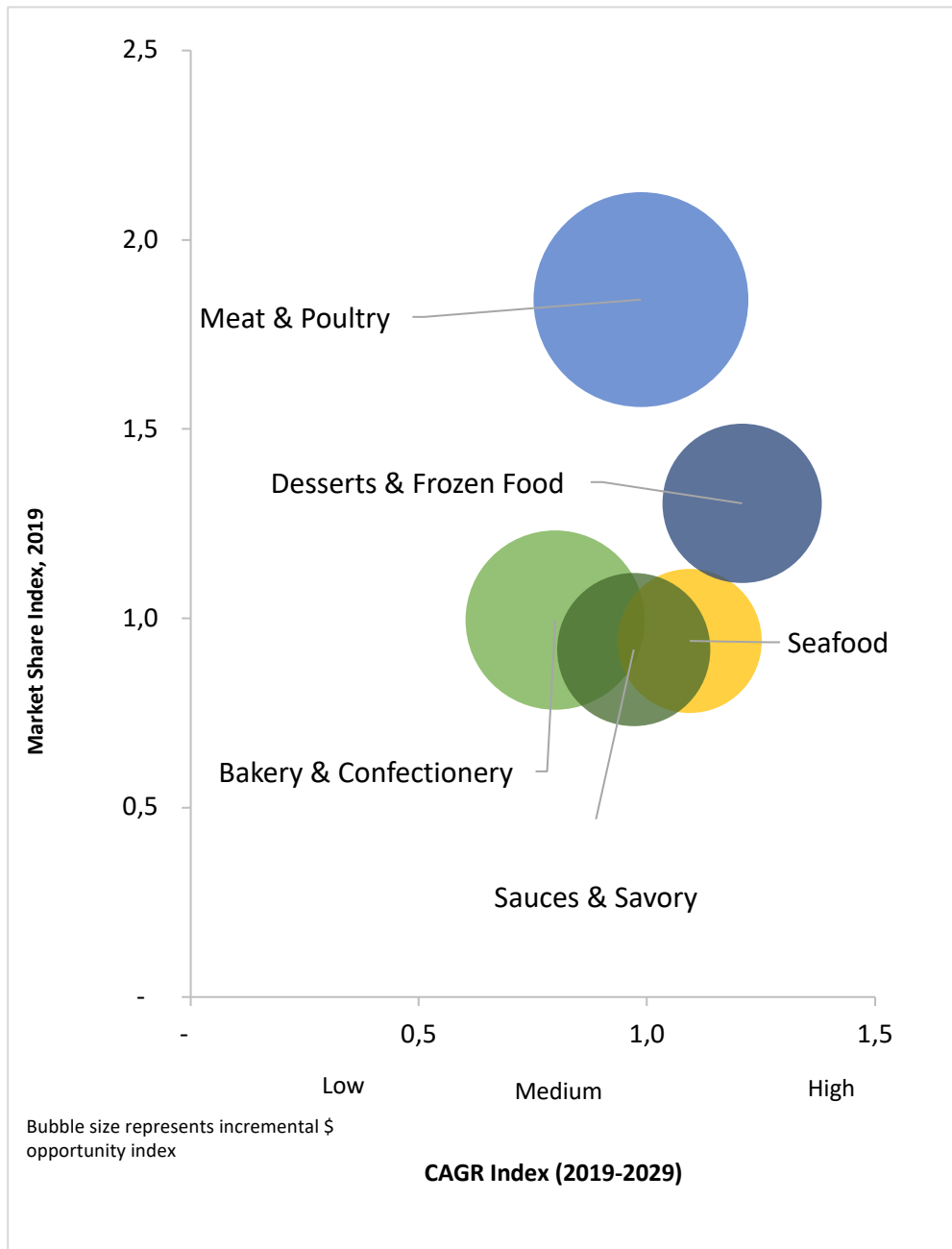


Figure 32. Global Gourmet Salts Market Attractiveness analysis by end use, 2019-2029

### 3.8 Market Structure and Market Share Analysis

Global gourmet salts market is primarily characterized by an essence of large number of regional and multinational companies operate. An approximate share of 40-45% is accounted by multinational players and offers wide range of gourmet salts based products in global specialty ingredients market. North America, Europe, and Australia are the two main regions on their target due to increasing per capita consumption of ready-to-eat fruits and vegetables in the region. Companies such as Cargill Inc., Morton Salt, Inc., Saltworks Inc. Murray River Gourmet Salt, INFOSA and others are some major companies operating in gourmet salts market.

Further regional players and local players accounts market share of 30-35% and local 15-20% respectively. Primarily these players are operating in East Asia and South Asia.

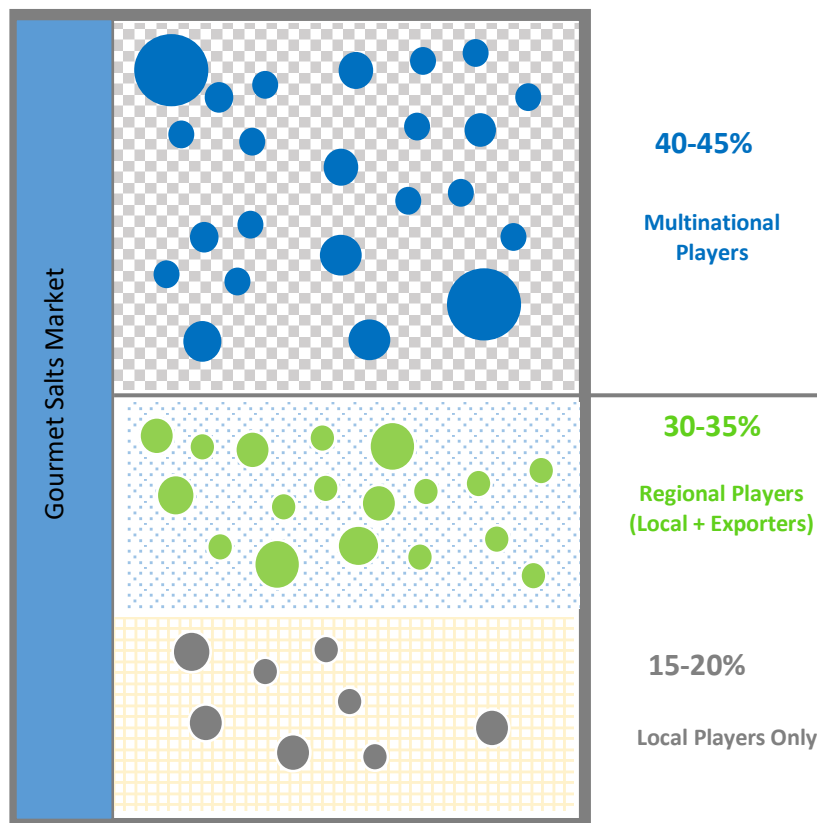


Figure 33. Global Gourmet Salts relative market share



## 4 Results (2) - Target and brand positioning

The study on type and profile of potential consumers defines differences in term of countries consumption, potential consumers number, the importance of product attributes for the consumer and the most influential salt aspects driving the purchase choice. It also performed the identification of the countries with the highest purchasing potential according to the evolution of consumers.

Main target according to market information should focus mainly on:

- Meat, Poultry and Seafood market. Dessert and Frozen foods as future
- Europe market as the most important market share. South Asia as growing
- Fleur de Sel and Flake Salt as represented 50% market

Regarding to consumer, we hope to get more information from qualitative analysis in order to define a consumer profile.

Due to competitor analysis and market questions analyzed we can define positioning for mediterranean traditional salt as: Traditional salt products and secondary products from artisanal salinas.

Ideas for a positioning are based on the following items:

- Artisanal
- Traditional
- Gourmet
- Premium
- Mediterranean
- Hand made
- Ecological
- Natural
- Organic
- Healthy
- Environmental protected
- Eco Friendly
- Recycled
- Online sales
- Collaborative alliances
- Top quality
- Exotic
- Best packaging
- Caviar salt



## 5 Results (3) - Strategy objectives

Once market analysis is finished, we can define the following goals for the marketing action project:

- 1.- To look for an umbrella brand in Mediterranean Salinas
- 2.- To sell online through a common collaborative e-commerce platform
- 3.- To create a packaging format for Mediterranean salinas products
- 4.- To innovate in colors, textures, forms, packaging and flavors.
- 5.- To get a clean label speciality products
- 6.- High prices strategy according to quality
- 7.- Improve distribution systems: channels and logistic
- 8.- Communication strategy according to positioning values selected

## 6 Conclusions, comments and next steps

After one year Project, regarding to marketing program planned, we have a high view of the most important factor affecting the gourmet salt market as the principal focus market to commercialize goods and service that come from Mediterranean salinas interested in Medartsal project.

Now we have a clear view of the market forecast, necessary to implement activities planned to improved marketing strategy in SME companies all over Mediterranean area.

Target and positioning have been settled to show the way for developed ideas to improve.

Goals offer a clear perspective for SME to work in the next future looking for a better position in the market.

Second year is expected to serve to create the necessary e-commerce platform for SME to market products join with a digital marketing strategy capable of creating a commercial space of interest to companies.