



An invitation to subscribe to the second

Gira Ingredients Club

Focus on sustainability, protein alternatives, development strategies, etc.



May 2024

WHO IS GIRA ?

Gira, founded in 1970, is a leading strategic market consultancy firm renowned for its expertise and professionalism by key food industry players. Gira works across all levels of the food industry value chain from farm inputs to packaged consumer goods. With a vast network of international experts, contacts and clients in the dairy, meat, bakery and ingredients sectors, Gira has the unique ability to bring together key industrial operators and conduct unbiased market analysis. Our long-standing reputation in the global market opens doors for us to the most knowledgeable and trustworthy sources of information. Our neutral position allows us to provide reliable and comprehensive market analysis, offering the most unbiased strategic insights for your business.

WHY THE GIRA INGREDIENTS CLUB?

- Gira created the **Gira Ingredients Club (GIC)**, dedicated to **animal, plant and novel ingredients**, to address **common objectives, issues and challenges** faced by clients in various sectors.
- The **global ingredients landscape** is at the heart of multiple technical, competitive, social and environmental trends: the debate about the environmental footprint of different sources of ingredients is ongoing, along with the challenges related to processing, scalability, and organoleptic quality (taste and texture), as well as nutritional and functional properties.
- Gira has accumulated significant expertise in technical ingredients over the past decade, regularly conducting both individual and multiclient studies across multiple end-user sectors such as mainstream foods, infant, adult and medical nutrition.

→ The Club evolves year-on-year, adapting to your business needs, with a special emphasis on alternative proteins, sustainability and strategy for growth in the 2024 edition.

TYPES OF INGREDIENTS COVERED

- Sourced from dairy:** whey derivatives, caseins, MPC/I, MCC/I, native whey proteins, lactose and permeates, MFGM, lactoferrin, immunoglobulins, α -Lac, β -Lac, etc.
- Sourced from plants:** Proteins (pea, soy, wheat, etc.), starch, fibers, vegetable oils, etc.
- “Novel” sources:** Fermentation (biomass & precision), mycoproteins, cell-based alternatives, etc.
- Other:** collagen, ovalbumin, keratin, etc.

GIC 2023 ATTENDEES



FEEDBACK 2023

“...content plus the calibre of speakers and attendees was excellent...”
 “...having a focused forum addressing the trends, challenges, opportunities and market dynamics for ingredients was great...”
 “...the learning experience from this meeting has been extremely beneficial and I see fostering continual engagement amongst the attendees creating a cohort...”
 “...a really good networking opportunity...”
 “...speakers were all very good and the content of the conference was fantastic...”
 “...excellent and fascinating webinar...”



Conference

- Full day of in-depth and exclusive presentations accompanied by roundtable discussions
- Subscription includes accommodation, lunch and a Gala dinner for one delegate



Networking

- CEOs, strategy planners, sales and procurement directors, start-ups
- More than 30 international dairy & ingredient companies present



'Ingredients Insights' publications & mid-year webinar

- Three 5–10-page deep market & data analysis, including inputs from selected GIC clients
- Topics: alternative protein market analysis (PF, plant-based, PMF, etc.), end-user sectors analysis, etc.



Option: bi-annual update on Novel Ingredients

- An updated outlook on the Novel Ingredients sector to stay ahead of the curve
- Deep analysis of a special hot topic (1st volume: Alternatives to Meat)



Study Discounts

- 15% discount on multi-client studies for GIC members
- 2023 studies: Milk sugars, lactoferrin & lactoperoxidase, etc.

The 2nd Gira Ingredients Club (GIC) Annual Conference

A **one-day conference**, set in a “club” environment, on **September 12th 2024**, at the Jiva Hill Resort near **Geneva**:

- **From 9am to 7pm: GIC members’ exclusivity**
 - Deep-dive into the ingredients sector, exploring key developments, trends, hot topics and our forecasts for the upcoming year.
 - High-level insights shared through engaging presentations, providing exclusive data and market knowledge, obtained through our extensive network and discussions within the industry.
 - Engage in insightful discussions with Gira during the conference, during which we will present key trends impacting the global ingredients sector.
 - Presentations from Gira's experts and external key speakers.
- **Evening: Gala dinner**
 - The perfect opportunity for GIC and GDC members to socialise, share outlooks and opinions, and enjoy a tasty moment together.



Agenda *(to be finalised)*

Introduction: challenges et opportunities in the world of ingredients

- Dairy ingredients: from environmental challenges to growth estimates
- Plant-based ingredients: how to achieve growth? Forecasted evolutions
- Precision fermentation/cell-based ingredients with added functionality: from technical challenges to scale-up strategies, regulatory changes, etc.

Session 1: Breaking down the barriers

- Development of new business models
 - Sustainability and circular economy: valorisation of by-products
 - Carbon emission reduction: a new component of value creation in business models?
 - New partnerships to add value
- What consumers want and solutions offered by ingredients (or yet to be discovered)

Session 2: Pushing boundaries

- Accelerators and constraints: benefits from AI emergence, complexity of regulations
- New applications for ingredients: opportunities in non-food sectors (from cosmetics to bio-materials and pet food)
- New markets for growth opportunities (Asia, MENA, and others)

There will be allocated time for questions and discussions among GIC members and the Gira team.

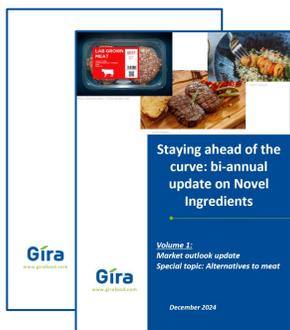
'Ingredients Insights' publications & mid-year webinar



The GIC continues beyond our annual conference in September. Throughout the year, you will receive exclusive analysis, news, and market updates in the form of three 'Ingredients Insights' and a mid-year webinar.

- **Proposed topics** (to be discussed between members during the conference):
 - Emerging trends in sports nutrition and active lifestyle.
 - Competitive analysis of novel ingredient sources: where are the growth opportunities and added-value ingredients?
 - Collagen sourcing and its various market applications
- **Mid-year webinar** aimed at showcasing recent market evolutions, focusing on a specific theme. Webinar duration = 1.5 hours.

Bi-annual update on Novel Ingredients reports & webinar (optional)

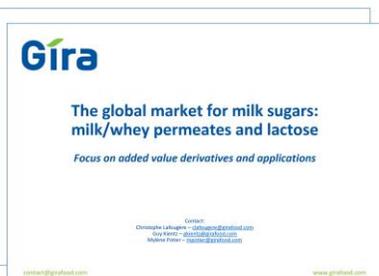


The Novel Ingredients (made through precision fermentation, cell-based alternatives, etc.) sector is evolving fast, therefore Gira is offering an innovative multiclient study in a bi-annual format for you to stay ahead of the curve. You will receive two reports, each covering:

- Latest updates on players in the sector, new ingredients' developments, regulations, market challenges and opportunities
- Focus on a specific topic: first volume delves into alternatives to meat. The topic for the second volume will be discussed with members

➡ [More information on the following page](#)

Discount on Gira studies



The GIC members can also take advantage of a 15% discount on our multi-client research studies. We are recognised for providing comprehensive market data, qualitative insights and forecasts.

Example of recent studies produced:

- Valorisation of Milk Sugars (discount price: 12'750 euros)
- Lactoferrin & lactoperoxidase global market (discount price: 8'500 euros)

Gira will produce a **deep analysis of Novel Ingredients**, which will cover the latest ingredients produced through Precision Fermentation, Cell Culture, Plant Molecular Farming, Biomass fermentation, and other innovative technologies.

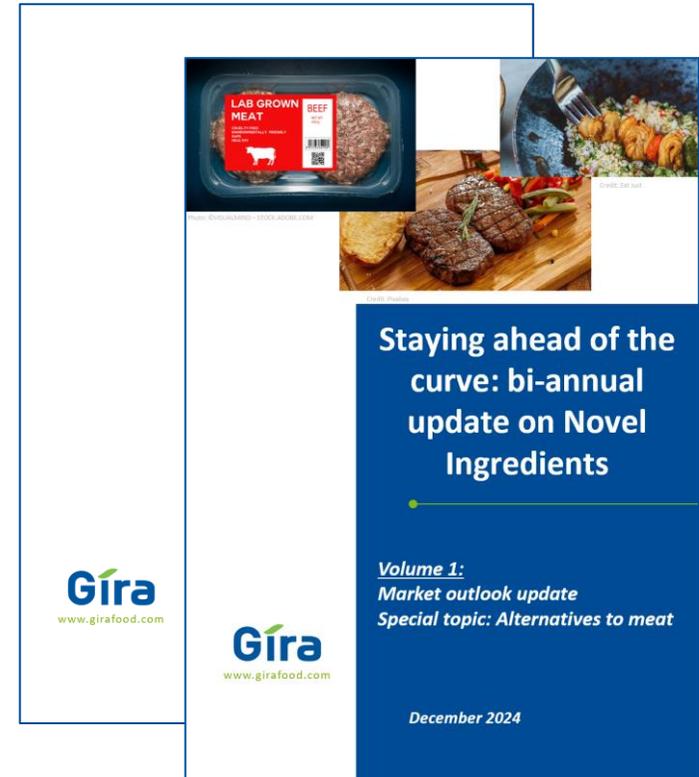
As this sector is evolving fast, this study will be proposed in a unique **bi-annual reports**, to remain updated throughout the year.

- The first volume will be released in December 2024
- The second volume is expected in May 2025.

GIC members who subscribe to this option will receive two comprehensive reports (each of 10 to 15 pages), along with a **webinar**.

Each volume will consist of:

- An **up-to-date outlook of the novel ingredient sector**, including the competitive landscape, trends, applications, as well as regulations and approvals.
- A **special topic** will be featured in each volume. The first volume will focus on **alternatives to meat**: where we are, main challenges and opportunities.
 - Gira will turn to GIC members in early 2025 to jointly decide the hot topic for the second volume.



TIMING



MEMBERSHIP FEE

The **Membership fee for the 2024 edition** of the Gira Ingredients Club is **EUR 6,000 (before any applicable taxes)**.

- **Gira Dairy Club 2024 members** are eligible for a **special discounted price of EUR 4,000**.

The fee includes:

- **Attendance** for one delegate at the Members' Conference on September 12th 2024. The conference will be recorded with the consent of external speakers.
- Electronic copies of the presentations, **accommodation** for the 12th of September, and meals during the conference at the Jiva Hill Resort for one representative from each Member organisation. There is the possibility to appoint a second delegate. Please contact Gira.
- The three '**Ingredients Insights' publications** and access to the **Webinar Market update**
- **15% discount** on special focus studies (example: Milk sugars, Lactoferrin ...)

Option: Staying ahead of the curve - bi-annual update on Novel Ingredients

- The fee for the bi-annual update on Novel Ingredients is **EUR 4,000** (EUR 3,000 for GDC members).



Christophe Lafougere

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Christophe Lafougere, CEO of Gira, is directly responsible for Gira's assignments within the global dairy sector. He has been directing Gira's consulting and research activities in the dairy sector for over 30 years, covering all aspects of production, collection, processing and marketing, spanning across the major dairy-producing and consuming regions worldwide.



Mylène Potier

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Mylène Potier, Ingredients Director at Gira, has been responsible for all studies and research related to technical dairy ingredients for over 10 years. Mylène has a PhD in Human Nutrition with particular reference to milk proteins. She supervises a team of consultants who bring a wealth of experience from various individual and multiclient studies carried out over the years in the dairy and ingredients sector.



Guy Kientz

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Guy Kientz, Senior Advisor with Gira, has extensive expertise in the food ingredients industry, including dairy. He has occupied senior management positions in renowned companies in Europe, the United States and Asia Pacific, mainly Japan and Singapore. Guy brings his expertise in strategic consulting, project management and M&A to the Gira team.



Laurène Bajard

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Laurène Bajard, a consultant with Gira for over 5 years, has an extensive understanding of the food industry, from production to marketing. Her expertise lies in the dairy sector and alternatives markets such as plant-based and precision fermentation. Currently, she is dedicated to exploring innovation, emerging technologies, strategic approaches and investments within the dairy and meat alternatives sector.

GIRA DAIRY CLIENTS

Agropur	Emmi	Mueller
Agrial/Eurial	EU Commission	Nestlé
ALIC	Eucolait	DMK
Alpma	Fedegan	Rupp
Arla Foods	FIT	Sealed Air
CHR Hansen	Fonterra	Sodiaal
Coveris	Friesland	Solarec
Dairygold	Campina	Standing Ovation
DanTrade (Danone)	Glanbia	Unilever
DSM	Kerry	USDEC
Dupont (IFF)	Lactalis	Valio
Euroserum	Laïta	Yili
	Meggle	

GIRA DAIRY CLUB MEMBERS 2023

Agropur	Emmi	IFC World Bank
Arla Foods	Eurial	Inalpi
BordBia	EU Commission	Lactalis
CHr Hansen	Ferrero	Land'OLakes
Comital	FIT	Sodiaal
Dantrade	Fonterra	USDEC
DMK	Glanbia	Valio
DSM	Groupe Bel	

GIRA INGREDIENTS CLUB MEMBERS 2023

Agropur	Lactalis	Turtle Tree
Clasado	Mercurius	USDEC
DMK	Saputo	Volac
Eurial	Standing Ovation	