

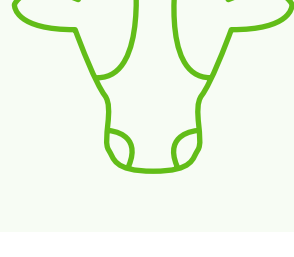
2018 in Review

We've rounded up a few of the top stories and insights around the world for Dairy in 2018

Dairy 2018 in numbers

Global Dairy Retail Value ¹

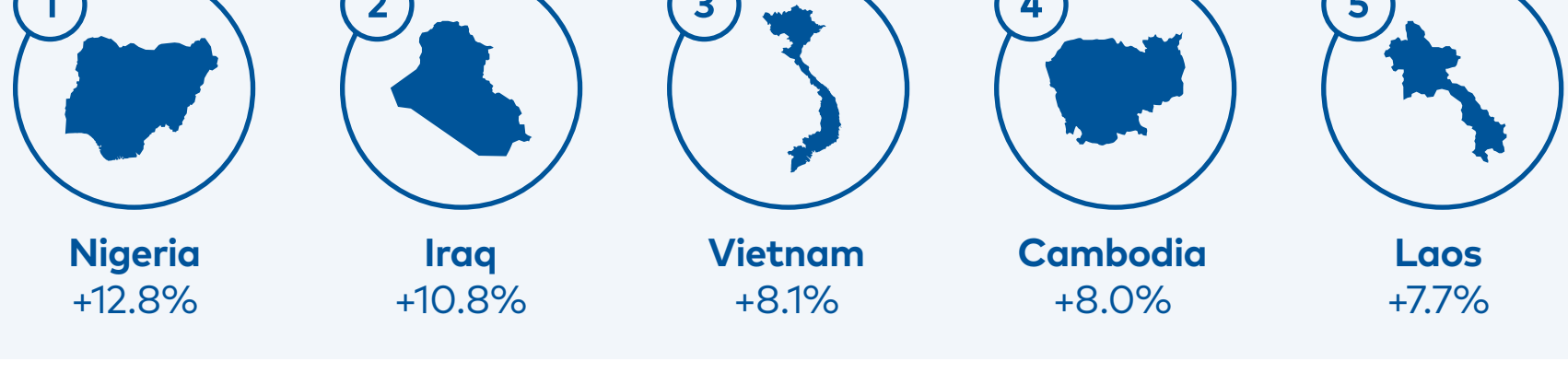
US\$501 Bn
+4.2% growth vs 2017



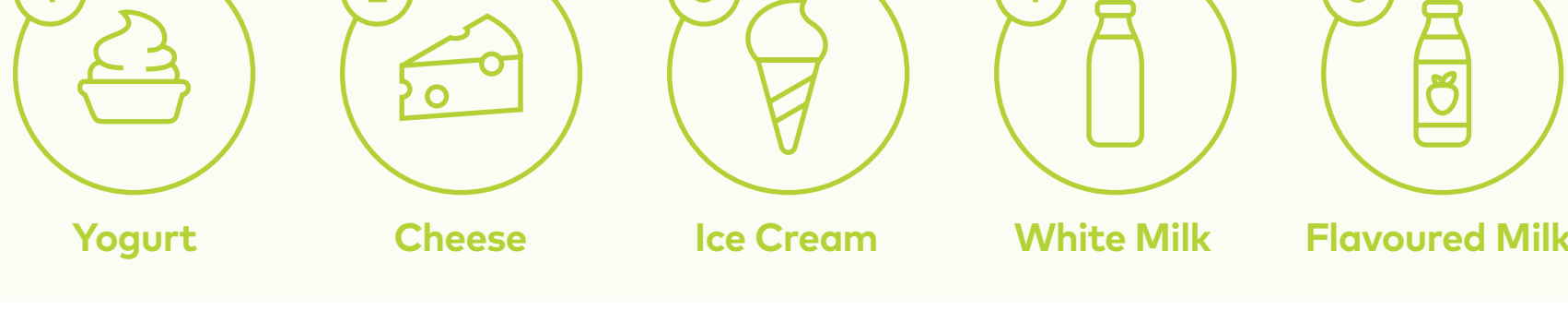
Total Number of NPDs ²

26,203
+5.2% growth vs 2017

Highest growth markets in 2018 (by vol. tonnes)¹



Top Category Innovators (by number of NPDs)²



Top Functional claims (by number of NPDs) ²



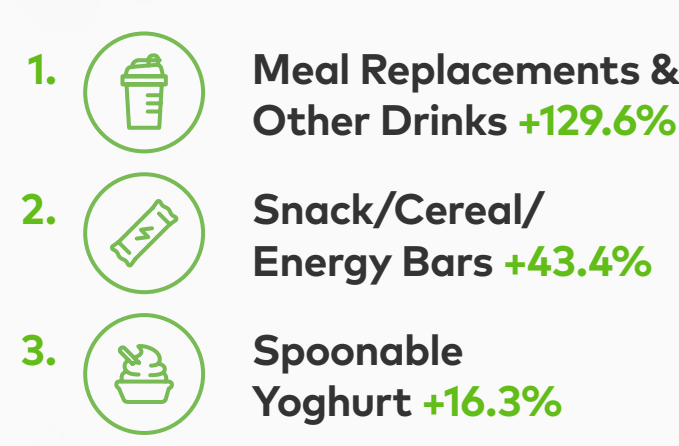
Protein is mainstream

High protein claims expand outside the core sports nutrition category

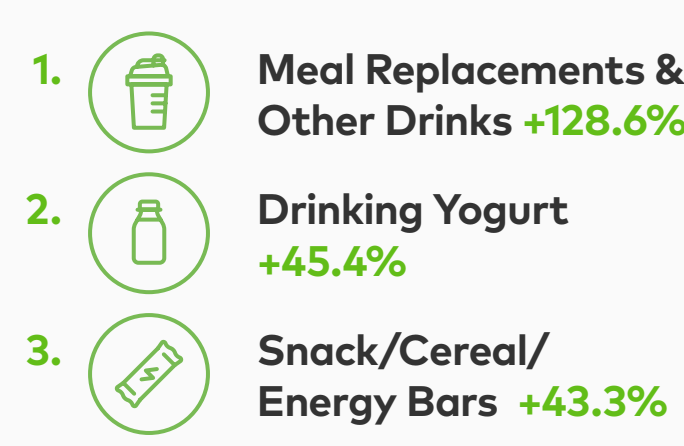
Total Number of NPDs in food and beverage with high/added protein claims ²

7,202 +47.6% growth vs 2017

Top categories by number of NPDs ²



Top categories by highest growth ²



*Based on 2018 vs 2017

Developed countries are still the most active mainstreamers

Markets with greatest number of high protein product launches ²



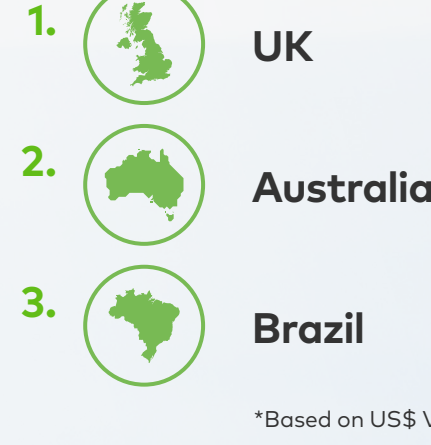
Markets with highest % growth of high protein launches ²



*Based on 2018 vs 2017

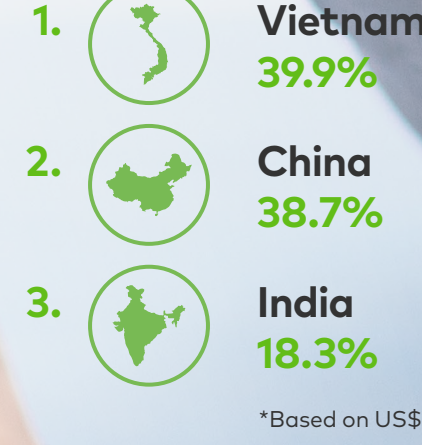
But outside the USA, emerging markets are growing fastest

Top markets outside US ¹



*Based on US\$ Value in 2018

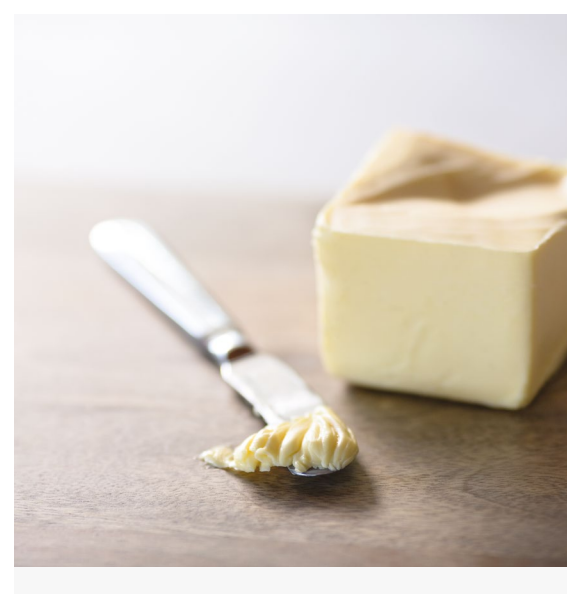
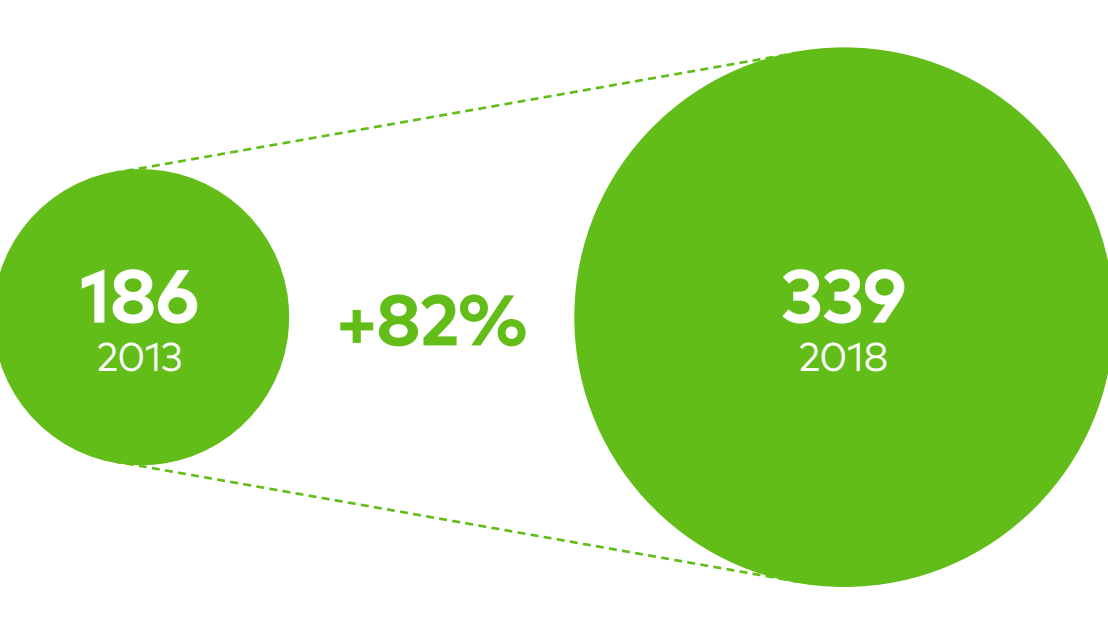
Fastest growing markets ¹



*Based on US\$ IN 2018 vs 2017

The dairy fat comeback rolls on

Number of product launches made with whole/full fat milk¹, global ²



Highest number of whole/full fat NPDs² were positioned as

Premium & Smooth/Silky Texture

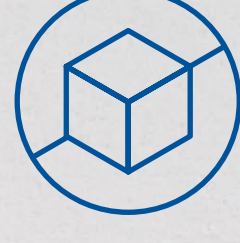
Ingredients and labelling entrenched in the mainstream

Consumers are more mindful and curious about the food and drink they consume



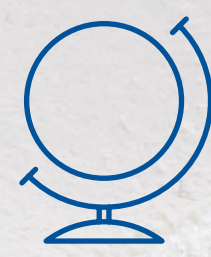
54%

of global consumers pay high/very high attention to the ingredients used in the food & drinks they consume⁴



44%

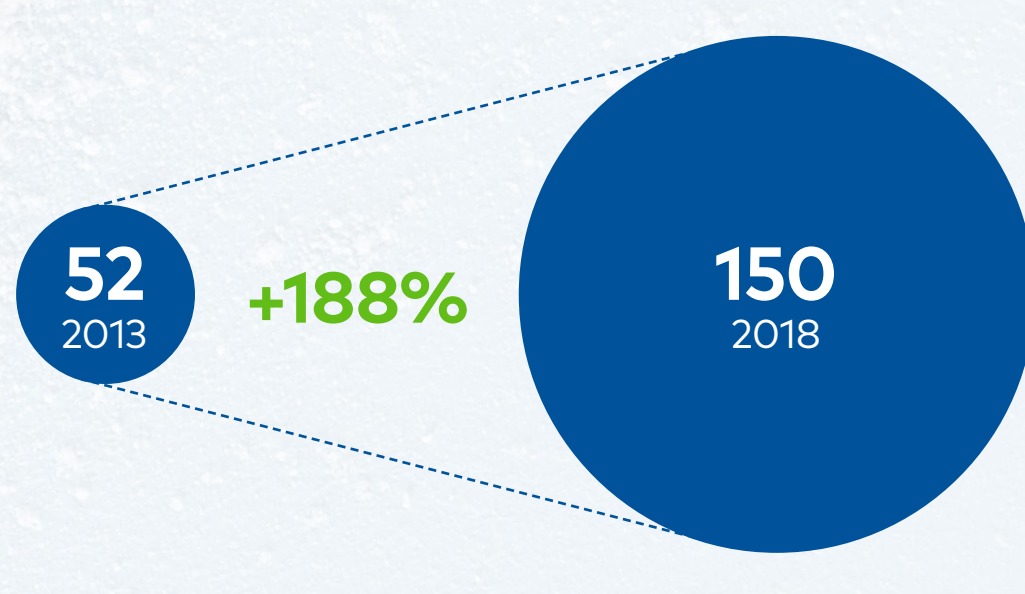
of consumers globally, think that low sugar products are healthy⁴



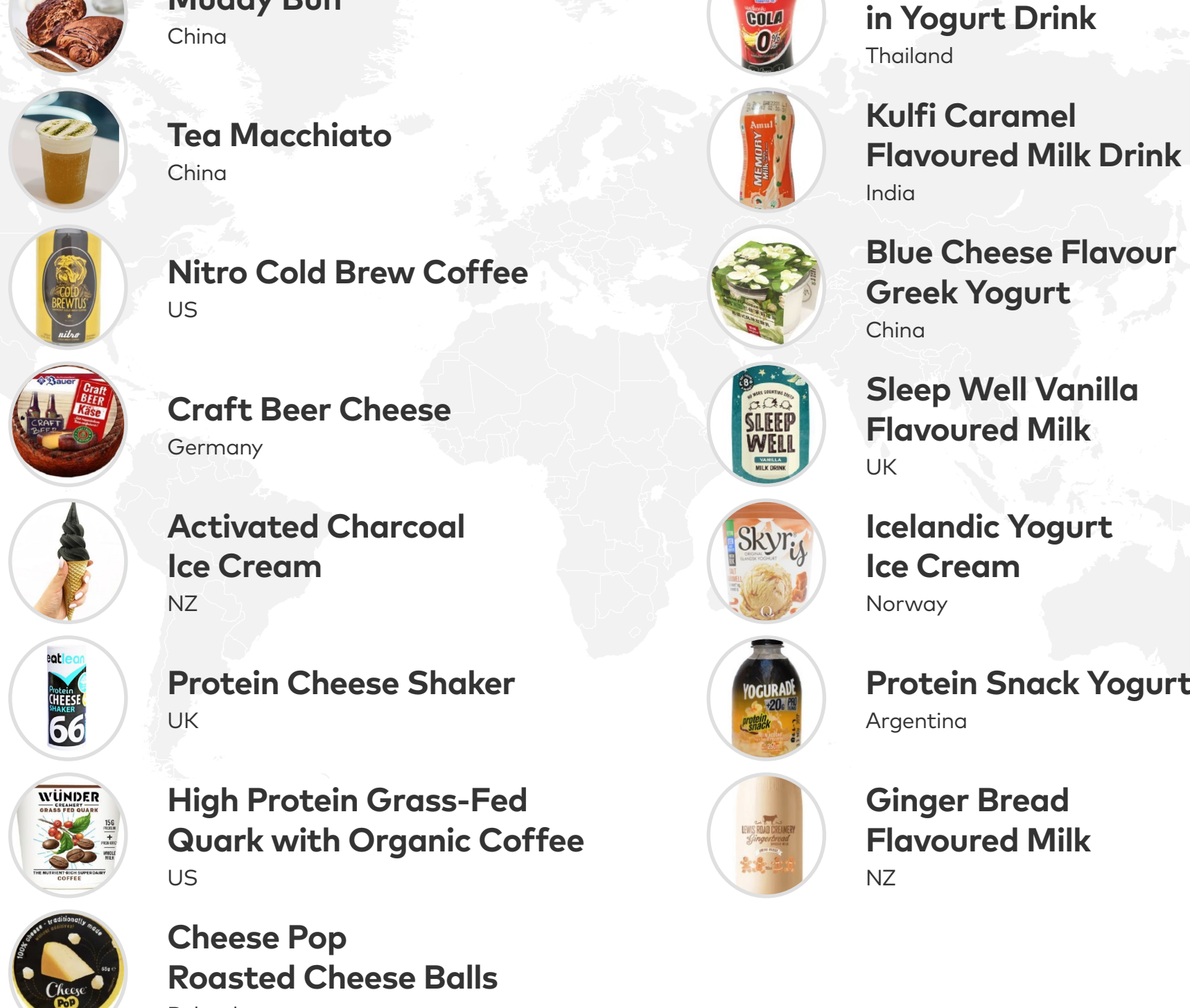
globally almost 9 in 10

consumers find on-pack information that describes where a food or drink was made/comes from somewhat or very appealing³

Number of dairy product launches with 'grass fed' claims, global²



Interesting innovations in dairy²



Sources:

- Euromonitor 2018
- Mintel GNPD
- GlobalData, Global consumer survey Q1 2017
- GlobalData, War on sugar, 2018



Ingredients by Dairy for life