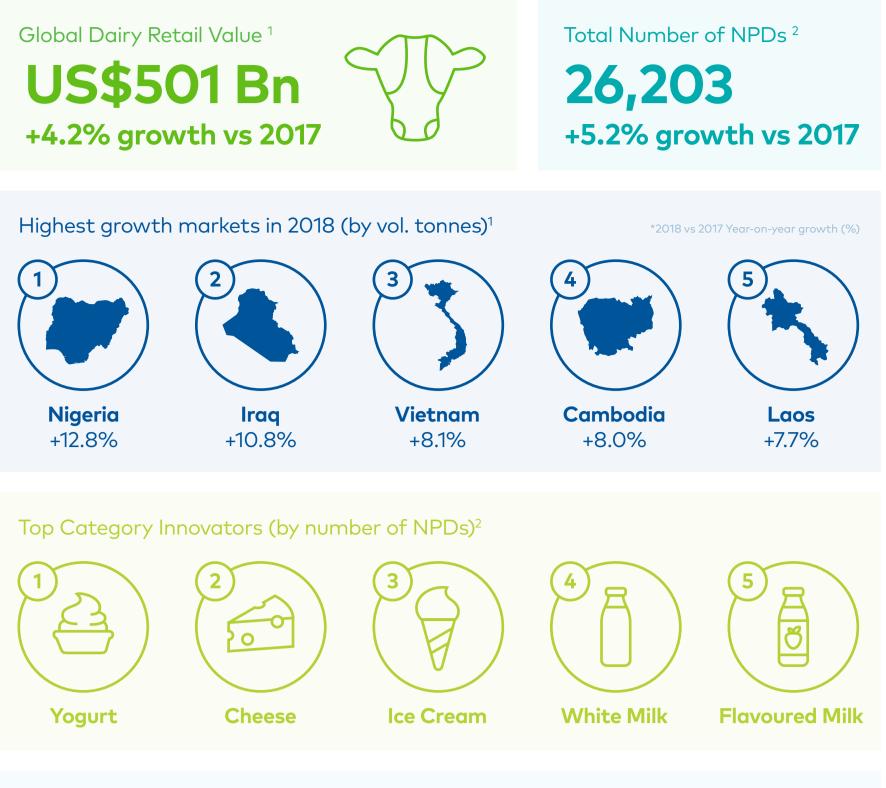


FAST FACTS 2018 in Review

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

Dairy 2018 in numbers







Health

+19.9%

Health

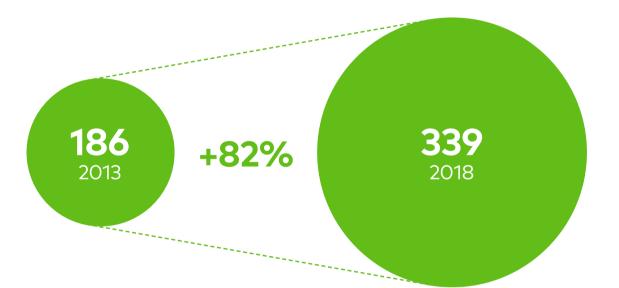
+26.8%

System

Protein is mainstream High protein claims expand outside the core sports nutrition category 7,202 +47.6% growth vs 2017 Total Number of NPDs in food and beverage with high/added protein claims² Top categories Top categories by number of NPDs² by highest growth ² Meal Replacements & Meal Replacements & 1. 1. Other Drinks +129.6% Other Drinks +128.6% 2. Snack/Cereal/ **Drinking Yogurt** 2. +45.4% Energy Bars +43.4% 3. **Spoonable** 3. Snack/Cereal/ Yoghurt +16.3% Energy Bars +43.3% *Based on 2018 vs 2017 **Developed countries are still** the most active mainstreamers Markets with greatest number of Markets with highest % growth high protein product launches² of high protein launches² 1. France USA +239.5% 2. Australia 2. India +203.8% 3. 3. Brazil UK +195.7% *Based on 2018 vs 2017 But outside the USA, emerging [4] markets are growing fastest Top markets outside US¹ Fastest growing markets¹ Vietnam 1. 1. UK 39.9% China 2. 2. Australia 38.7% India 3. 3. Brazil 18.3% *Based on US\$ Value in 2018 *Based on US\$ IN 2018 vs 2017

The dairy fat comeback rolls on

Number of product launches made with whole/full fat milk', 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%

44%

globally almost

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

of consumers globally, think that low sugar products are healthy⁴

consumers find on-pack information that describes where a food or drink was made/comes from somewhat or very appealing ³

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



Interesting innovations in dairy²



Muddy Bun China

Tea Macchiato China



Nitro Cold Brew Coffee US



Craft Beer Cheese Germany



Activated Charcoal Ice Cream NZ



Protein Cheese Shaker UK



High Protein Grass-Fed Quark with Organic Coffee US



Cheese Pop Roasted Cheese Balls Poland



Cola Flavour in Yogurt Drink Thailand





SLEEP

WEL

Skyrij

India **Blue Cheese Flavour Greek Yogurt**

China

Sleep Well Vanilla Flavoured Milk UK.

Icelandic Yogurt Ice Cream Norway



Protein Snack Yogurt Argentina



Store Stores

Ginger Bread Flavoured Milk NZ

Sources:

- Euromonitor 2018
- Mintel GNPD



GlobalData, Global consumer survey Q1 201 GlobalData, War on sugar, 2018 4.



