



# Sustainability has become a pervasive value driving consumer choices

Looking at major consumer trends, we can see clear traces of sustainability...



**WELLNESS**



A wellness lifestyle combines personal health, genuine ingredients, responsible consumption and care for environment

**TRADITION / ORIGIN**



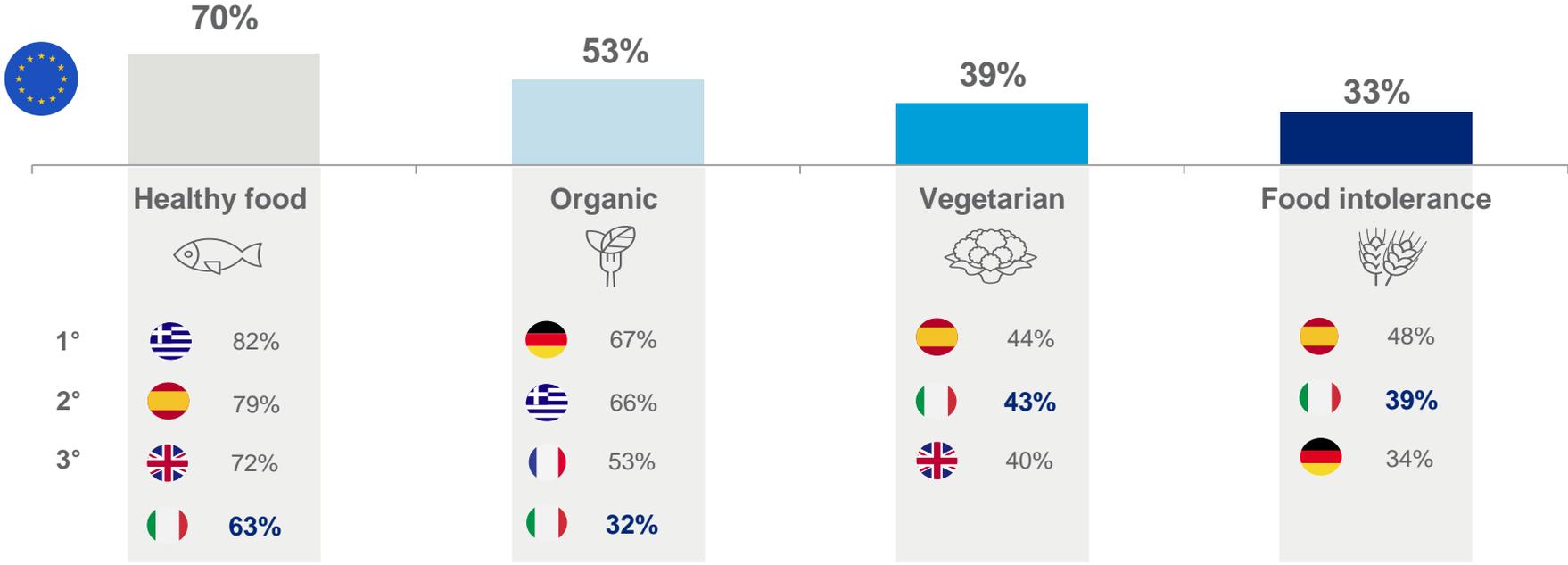
Local, "Km.0", of origin, traceable...  
Everything can guarantee quality of raw material and sustainable production processes

**CONVENIENCE**

**TASTE / EXPERIENCE**

# Wellness has become relevant in the usual “menu” of European shoppers

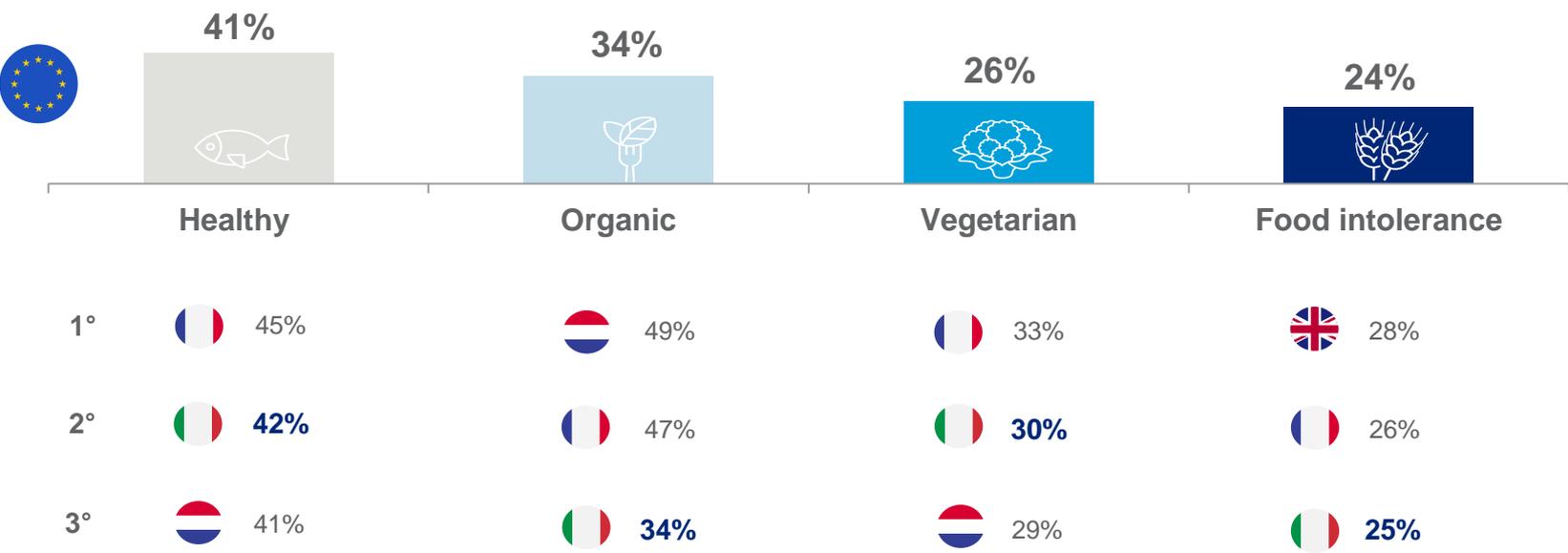
% of wellness consumers



Source: IRI European Shopper Survey – 2017 – Italy, Germany, France, Spain, UK, Greece, Netherland 20. Let's speak about food wellness. Do you buy the following types of food for yourself or your family?  
 Healthy food = whole grain, cereal-based, less salt-sugar-fat-calories

# Wellness food has a bright perspective to increase penetration

## Penetration change Net Score



Source: IRI European Shopper Survey – 2017 – Italy, Germany, France, Spain, UK, Greece, Netherland  
 21. Compared to 2-3 years ago, your consumption of these types of products has/is...increased, decreased, unchanged?

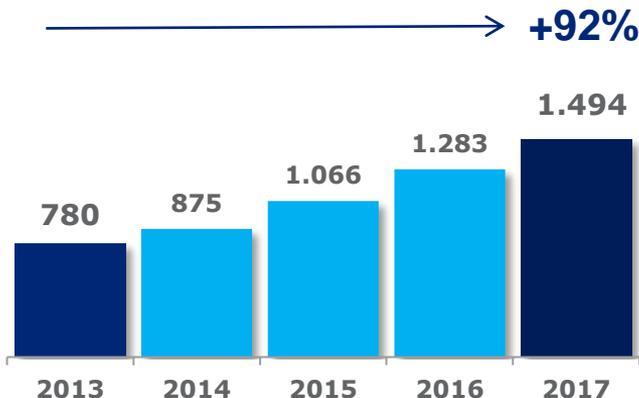


# Organic products doubled business in 5 years

## Larger assortments make supermarkets more competitive vs specialised stores

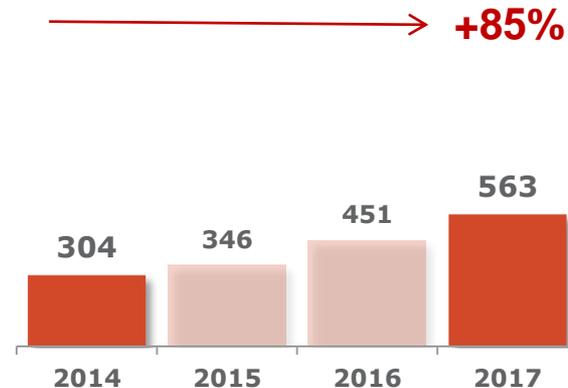


Value Sales (€ mio)



**Milk-based products (13%) +68%**

Average # Items per Store



**Milk-based products (8%) +73%**

Source : IRI Infoscan Census®— Italy Hyper+Super+Small Self Service – Fixed Weight only – Milk-based products: fresh/uhf milk, yogurt, butter, cheese

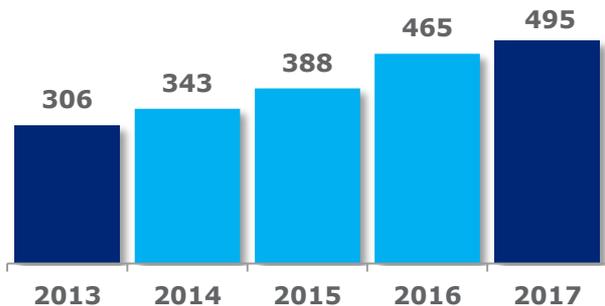


# Whole Grain / Cereal-based products lead the growth for Healthy Food



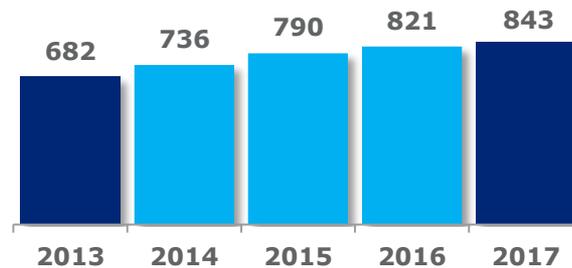
Value Sales (€ mio)

→ **+62%**



Value Sales (€ mio)

→ **+24%**



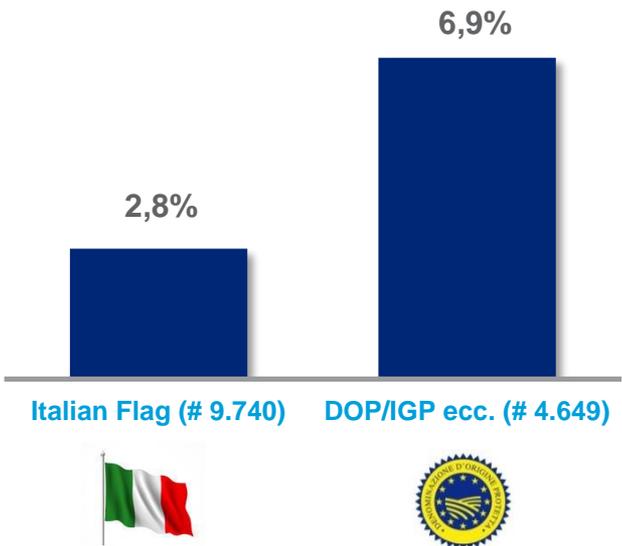
Source : IRI Infoscan Census®— Italy Hyper+Super+Small Self Service



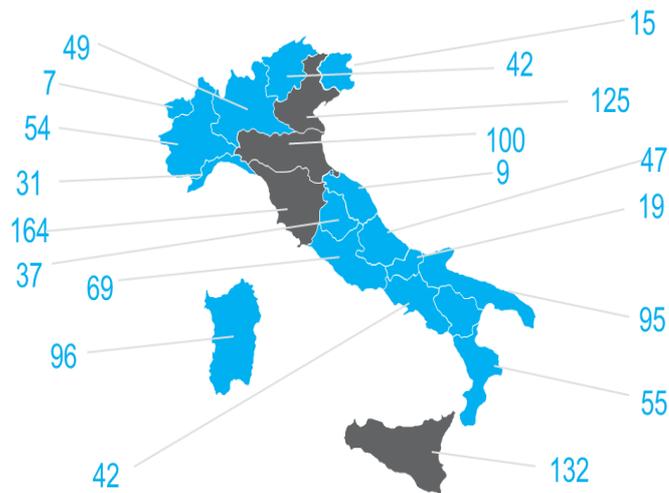
# Shopper award local product, certification of origin, typicity

## A number of brands claim their link with the territory

% Rate of growth in value



# of brands\* with regional claim



Source: IRI InfoScan Census@-GS1 Italy Immagino - Italy Hyper+Super+Small Self Service YE may18 vs 17

\* Milk excluded

# Many shoppers choose wellness food to embrace a sustainable diet



Source: IRI European Shopper Survey – 2017 – Italy, Germany, France, Spain, UK, Greece, Netherland 22. For which reasons do you buy these types of products for yourself and/or other family members?

# Greece is particularly worried about additives France and Netherland are more involved with environmental issues



**Additive-free**

**34%**

**27%**

**57%**

**39%**

**36%**

**37%**

**25%**

**20%**



**22%**  
**Protect environment**

**17%**

**19%**

**15%**

**26%**

**33%**

**35%**

**14%**

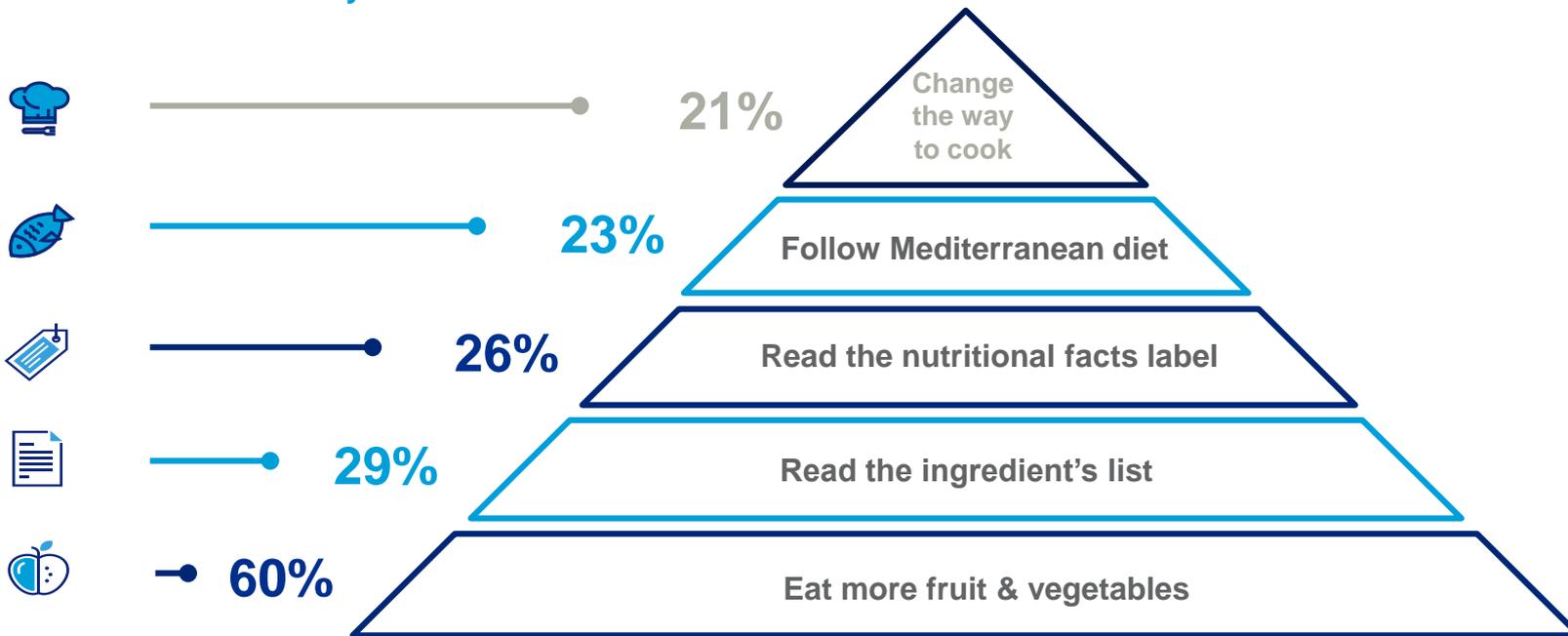
Source: IRI European Shopper Survey – 2017 – Italy, Germany, France, Spain, UK, Greece, Netherland  
22. For which reasons do you buy these types of products for yourself and/or other family members?



# Roadmap to healthy diet meets sustainability

## On-pack information become relevant to compete and drive growth

### Pillars to follow an healthy diet



Source: IRI European Shopper Survey – 2017 – Italy, Germany, France, Spain, UK, Greece, Netherland  
24. What do you think is the most important thing to do to follow a healthy diet?



# Products with third-part logo claiming sustainability generate growth in the market

**ENVIRONMENTAL SUSTAINABILITY**

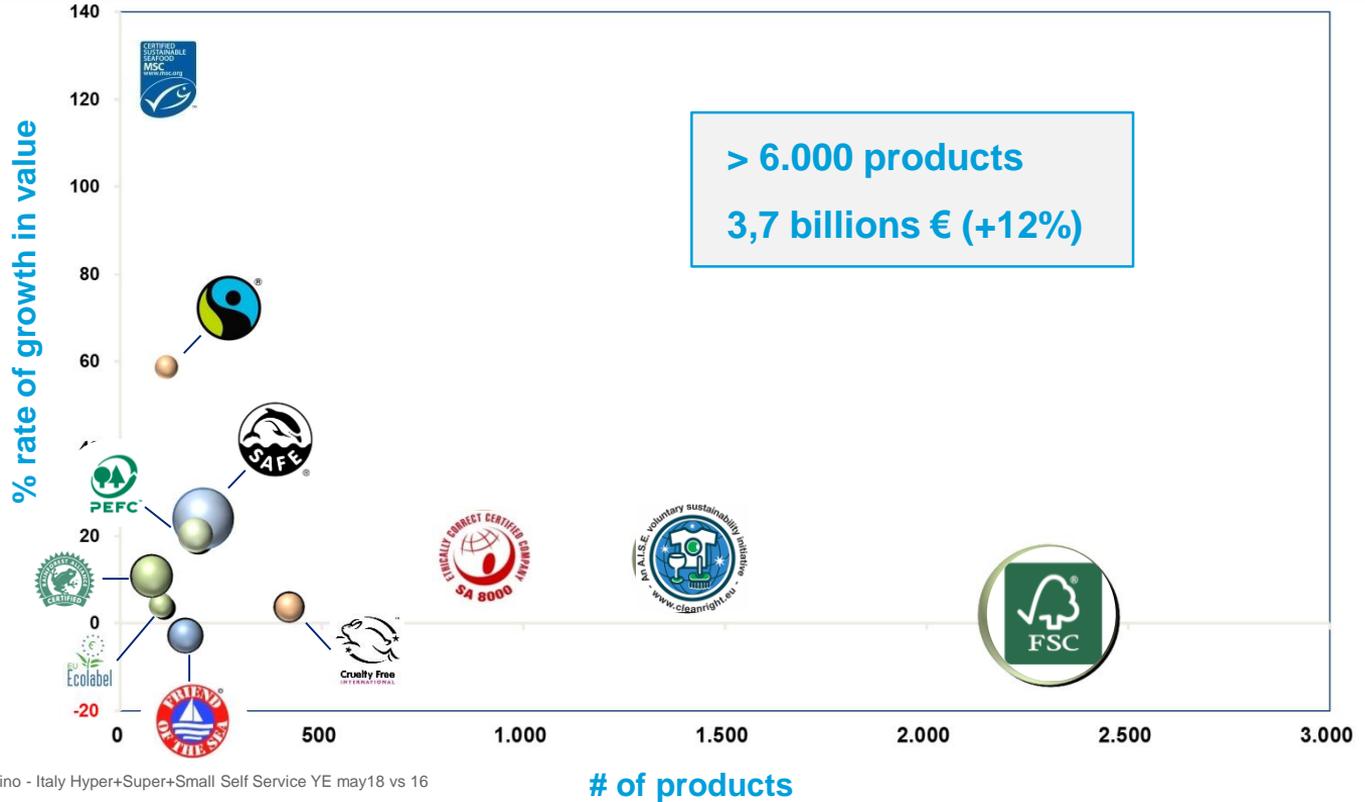
- Rainforest Alliance
- Ecolabel
- Sustainable cleaning
- FSC
- PEFC

**OCEANS PROTECTION**

- MSC
- Dolphin Safe
- Friend of the Sea

**SOCIAL RESPONSIBILITY**

- SA8000
- Fairtrade Foundation
- Cruelty Free Certified

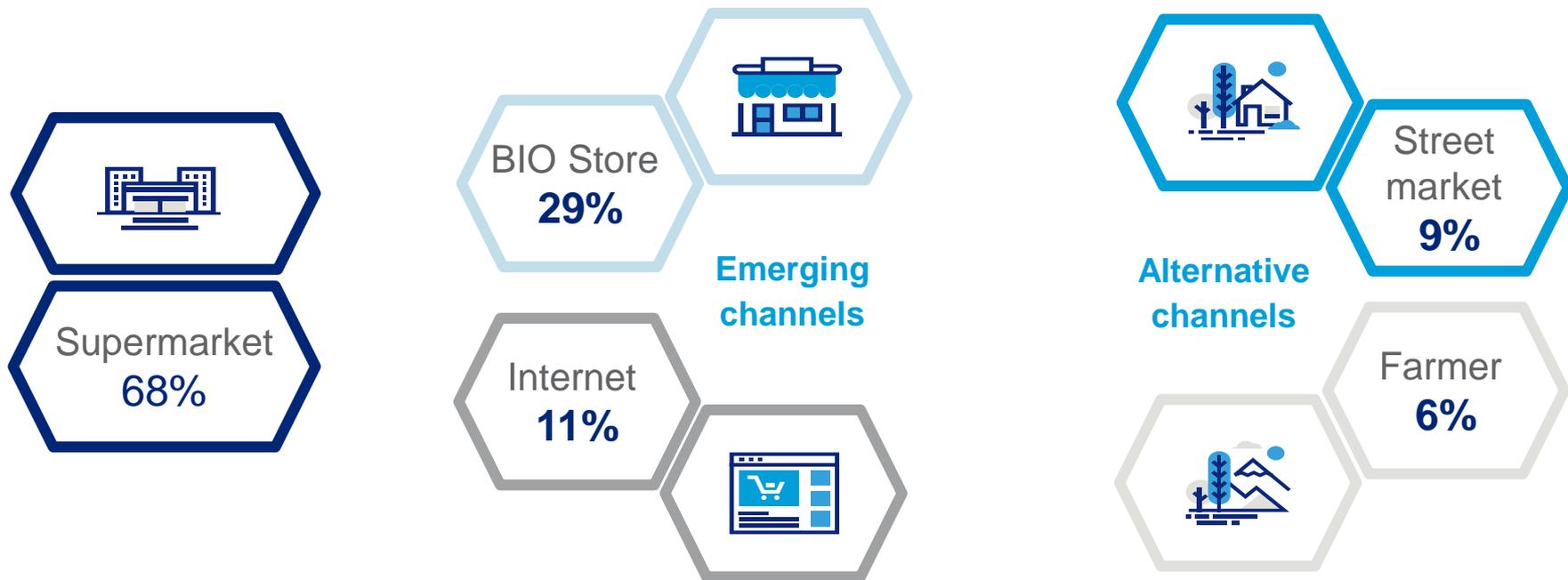


Source: IRI InfoScan Census®-GS1 Italy Immagino - Italy Hyper+Super+Small Self Service YE may18 vs 16  
Bubble size = value sales



# Mass market is still the main place where to buy wellness food ...but new channels are emerging

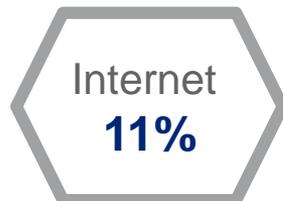
## Where to shop for wellness food



Source: IRI European Shopper Survey – 2017 – Italy, Germany, France, Spain, UK, Greece, Netherland  
23. In which types of stores do you buy these products?

# Bio Store and street market are more relevant in Greece Internet reaches an interesting role in Germany

## Where to shop for wellness food



1°  73%

 42%

 17%

 18%

All countries  
on  
average

2°  72%

 35%

 13%

 13%

3°  71%

 **32%**

 12%

 11%

 **67%**

 **11%**

 **7%**

Source: IRI European Shopper Survey – 2017 – Italy, Germany, France, Spain, UK, Greece, Netherland  
23. In which types of stores do you buy these products?

