GlobalData.

GlobalData Differentiation

August 31

We are here to help support your GROWTH STRATEGY as your Strategic Insights Partner

We can help you to:

Understand the **external environment**

Macro environment
PESTEL analysis
Economic forecasts

Understand the **industry environment**

Market sizing
Category sizing and forecasting
Channel segmentation

Competitive environment
Competitor assessments
Brand performance
Brand forecasting
Competitor advertising

Innovation
Product innovation reports
Product launch analytics

Financial
Profit pool analysis
Supply chain margins

Understand **your consumers**

Consumer & shopper trends
Future consumer trends
Consumer surveys

Demand spaces & occasions
Demand space maps
Occasion sizing

Grow in **existing markets**

Category opportunities
Emerging categories
Emerging Ingredients and Flavours

Channel opportunities
Direct to Consumer (DTC)
E-commerce

Marketing
Brand claims and strategies

Company strategies
Portfolio strategy
Route to market strategy

Grow in **new markets**

International expansion
Market attractiveness models
Market entry feasibility

Mergers & Acquisitions (M&A)
Commercial due diligence
Target searches
Industry assessments for IPOs

Consumer Products IC – Proposition

	FEATURE	GLOBALDATA
MARKET DATA	Survey Responses	1,000,000 (all years)
	City Level Category	101,817
	Brand Shares	> 108,000
	Innovations Tracked	200,000
	Categories and Segments	941
	Ingredient Profiles	34,456
	SKU Prices Tracked	586,242
ANALYSIS & INSIGHT	Companies	12,500
	News	66,432
	Deals	65,227
	Countries	110
	Cities Covered	3,000
	Analysis Reports	14,541 – All years 2,354 – one year
	Jobs	599,719
	Influencers	2,367
DISRUPTIVE INNOVATION & THEMATIC RESEARCH	Patents	4,440,377
	Themes	Yes

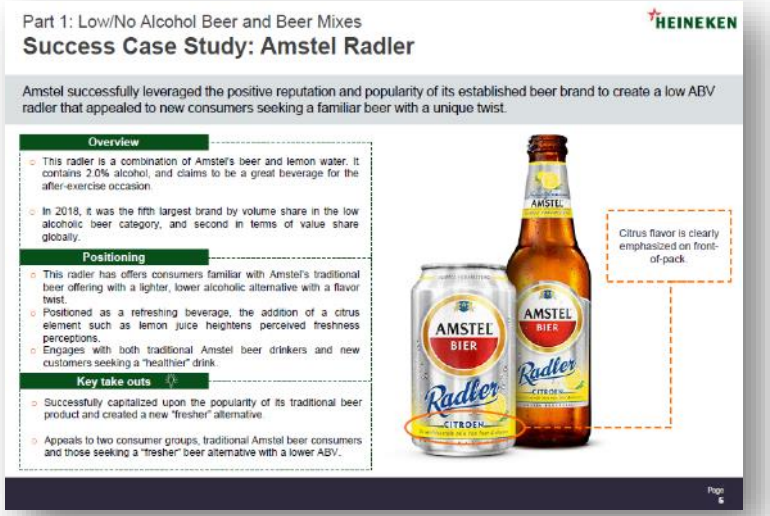
Category Presentations

Global Alcohol Report

Key questions answered:

- What alcohol categories offer the greatest opportunities and where?
- What are the trends driving growth?
- What will the landscape look like in 5 years?

Low/No Alcohol Beer and Beer Mixes



Key questions answered:

- What is the global opportunity in low/no alcohol beer and beer mixes?
- Which markets represent the best opportunities?
- What are the competition doing?

Global Cider Report

Key questions answered:

- Which markets offer the best opportunities?
- What are the potential white spaces?
- What needs and behaviours could be addressed?

International Expansion

Questions answered

1. Which countries represent the most attractiveness markets for us to enter?
2. What sub-sectors will work best within these markets?
3. What are my Top 10 best market opportunities?

Benefits to clients:

- Make major investment decisions on international expansion based on evidence.
- Understand opportunities based not only on market attractiveness but also existing company assets and capabilities.

Example: International expansion and category diversification strategy

Project DOM Market Attractiveness Index
Scorecard & Weighting

Cumulative Weighted Score
Green = Strong Potential
Yellow = Moderate Potential
Red = Low Potential

Scorecard (based on scoring criteria in each sheet)

Country	MCBC Division	Region	Category	Segment	Sub-Segment	Cumulative Weighted Score	Current Volume (2019)	Current Value (2019)	Value per HL (2019)	Historical Volume Growth	Forecast Volume Growth	Historical Value Growth	Forecast Value Growth
							3	5	3	3	4	5	5
Austria	E&L	West Europe	Soft Drinks	Adult Soft Drinks	Adult Soft Drinks	189	6	5	3	12	12	20	15
Austria	E&L	West Europe	Flavored Alcoholic Beverages	Alcoholic soft drinks	Alcoholic soft drinks	146	3	5	6	6	4	10	10
Austria	E&L	West Europe	Beer	Beer	Beer	201	9	15	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Beer Mixes	176	6	10	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Craft	132	3	5	6	15	16	25	20
Austria	E&L	West Europe	Beer	Beer	Beer - Discount	168	9	10	3	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Domestic	203	9	15	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Flavoured	176	6	10	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Flavoured Beer (beer type)	167	3	5	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - High Alcohol	173	3	10	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Imported	176	6	10	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Lager	200	9	15	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Licensed	176	6	10	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Low Alcohol	171	6	10	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Mainstream	202	9	15	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Non-Alcoholic	178	6	10	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Non-Craft	197	9	15	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Non-Lager	179	9	10	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Premium	174	9	10	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Standard Strength	203	9	15	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Superpremium	176	6	10	6	9	12	15	15
Austria	E&L	West Europe	Beer	Beer	Beer - Unflavoured	199	9	15	6	9	12	15	15
Austria	E&L	West Europe	Spirits	Brandy	Brandy	168	3	5	9	9	12	15	15
Austria	E&L	West Europe	Soft Drinks	Carbonates	Carbonates	199	9	15	3	9	12	20	15
Austria	E&L	West Europe	Soft Drinks	Carbonates	Carbonates - Discount	172	6	5	3	6	12	15	15
Austria	E&L	West Europe	Soft Drinks	Carbonates	Carbonates - Low Calorie	194	9	10	3	9	12	20	15
Austria	E&L	West Europe	Soft Drinks	Carbonates	Carbonates - Mainstream	197	9	10	6	9	12	20	15
Austria	E&L	West Europe	Soft Drinks	Carbonates	Carbonates - Premium	189	3	5	6	12	12	20	15
Austria	E&L	West Europe	Soft Drinks	Carbonates	Carbonates - Regular	189	9	10	3	9	12	20	15
Austria	E&L	West Europe	Cider	Cider	Cider	171	3	5	6	12	12	15	15
Austria	E&L	West Europe	Cider	Cider	Cider - Flavoured Cider (cider type)	184	3	5	6	12	16	20	20
Austria	E&L	West Europe	Cider	Cider	Cider - Mainstream	170	3	5	6	12	12	15	15
Austria	E&L	West Europe	Cider	Cider	Cider - Premium	175	3	5	6	12	12	20	15
Austria	E&L	West Europe	Cider	Cider	Cider - Superpremium	183	3	5	6	15	12	25	15
Austria	E&L	West Europe	Cider	Cider	Cider - Unflavoured (cider type)	171	3	5	6	12	12	15	15
Austria	E&L	West Europe	Soft Drinks	Mixers	Cocktail/Mixers	191	6	5	3	12	12	20	20
Austria	E&L	West Europe	Soft Drinks	Water	Coconut Water	199	3	5	6	12	16	25	20

Title & Notes | Scorecard | Dashboard | Current Volume | Current Value | Value per HL | Historical Vol Growth | Forecast Volume Growth | Historical Val Growth | Forecast Value Growth | Hist Inc Vol | Forecast I

Channel Opportunities

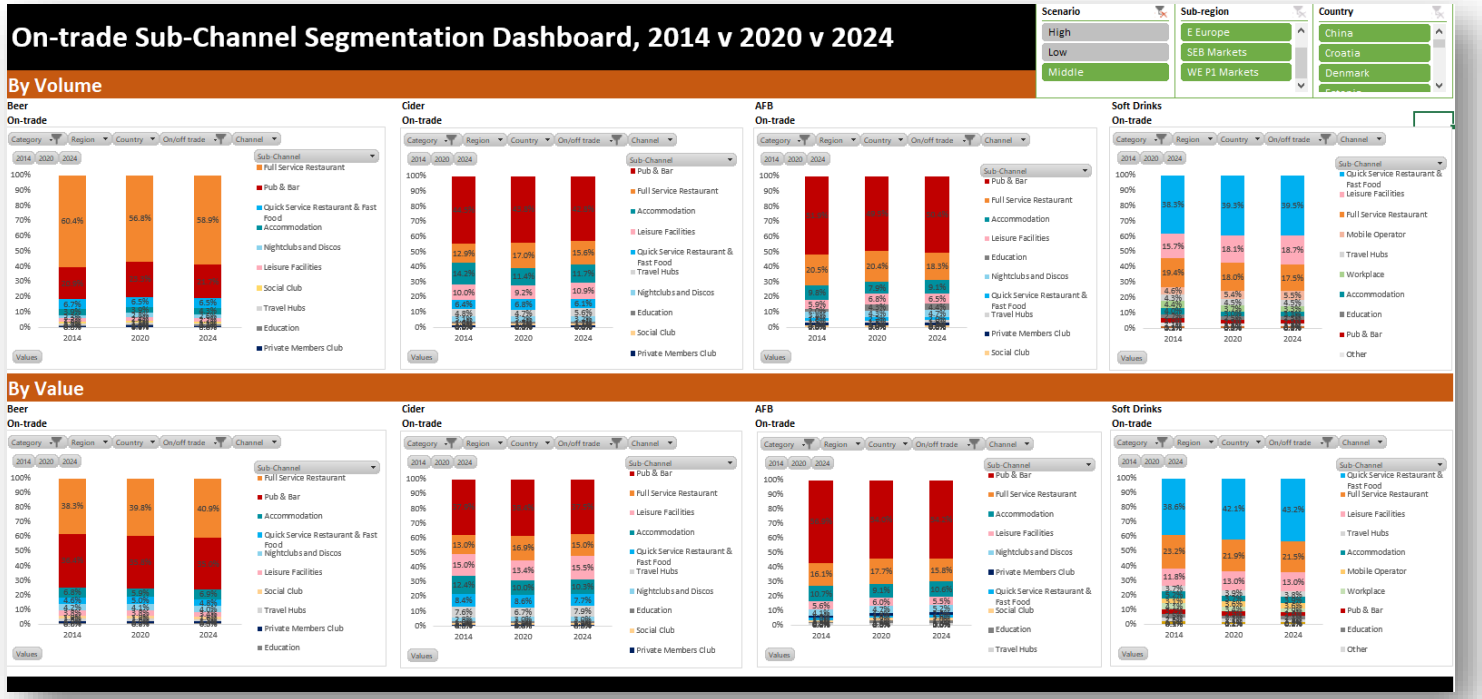
Questions answered

1. How can on-trade and off-trade channels be segmented down?
2. How will channels perform in future?
3. How will Covid-19 likely impact on the on-trade over the next 5 years?

Benefits to clients:

- Enables positioning of brands and products towards particular channels.
- Identifies growth opportunities.

Example: Channel segmentation of beer, cider and soft drinks in 30 countries



Consumer and Shopper Trends

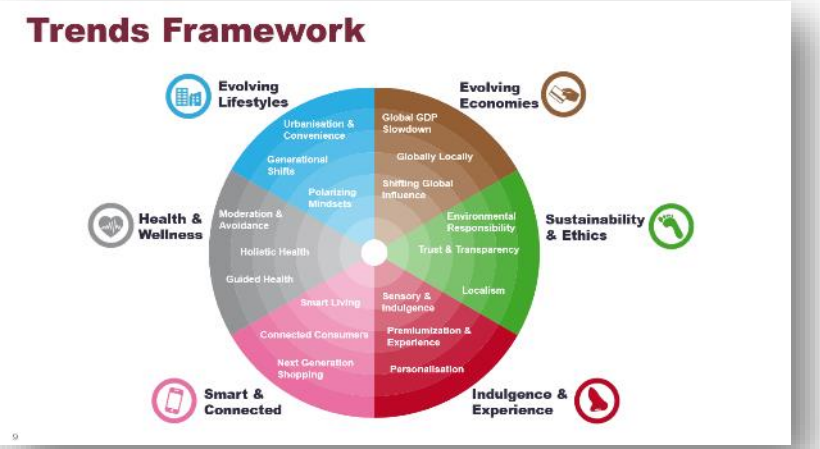
Questions answered

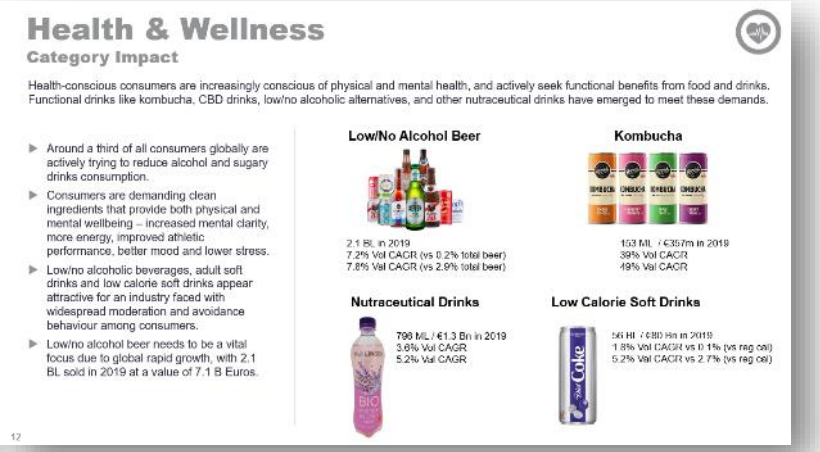
1. What consumer trends will impact the future of the food and beverages industry?
2. What impact will trends have on categories, brands, retail and foodservice?
3. How do these trends differ by region?

Benefits to clients:

- Understand your future consumers.
- Forms the basis for innovation.

Example: Future trends in food and beverages



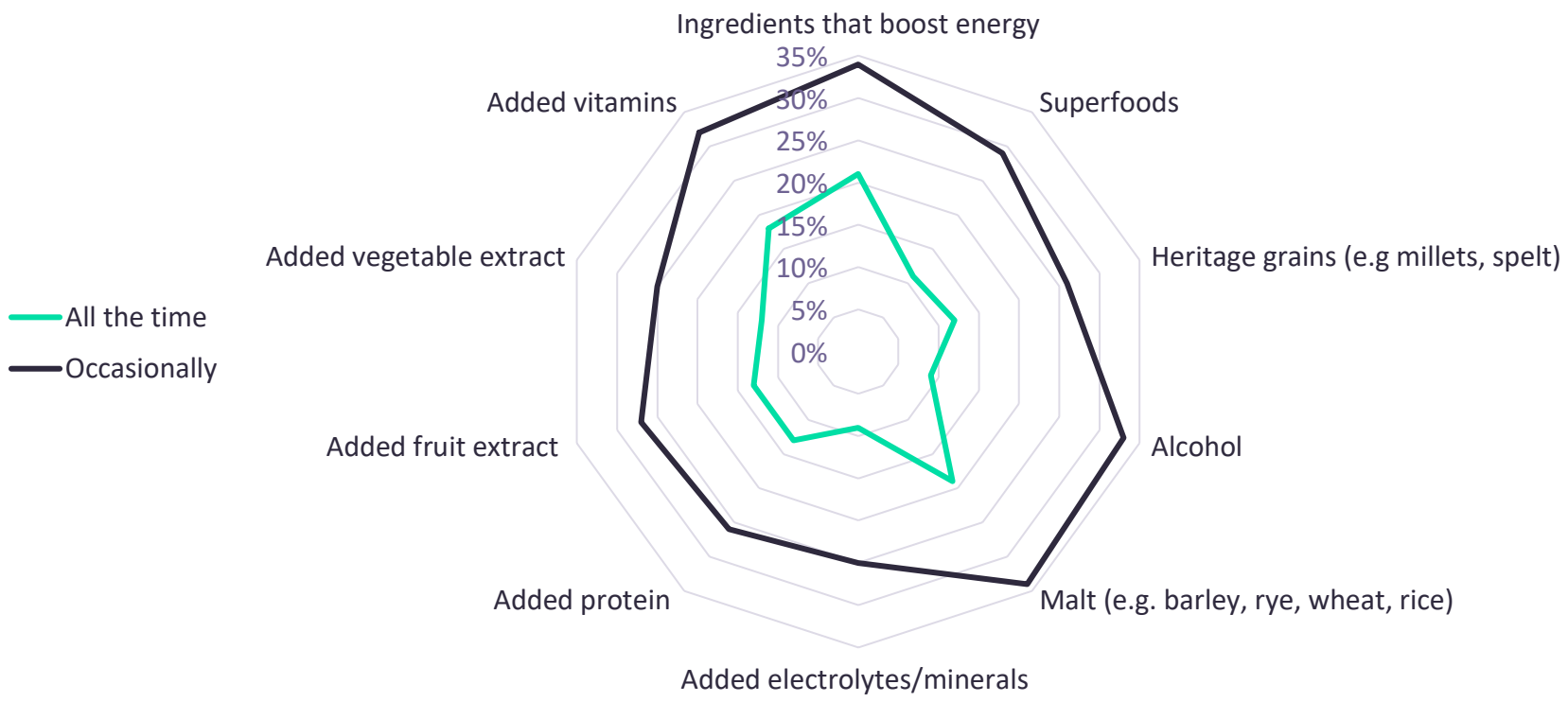


Tracking Flavour and Ingredient Innovations

Consumer Survey Insights: Ingredient Appeal

The popularity of functional health and energizing ingredients can be linked to lifestyle changes during the COVID-19 pandemic

Global: "How often do you buy food/drink products with the following ingredients?", 2021



Lifestyle changes during COVID-19 has heightened attention on health benefits

Over half (55%) of global consumers buy ingredients that boost energy, such as caffeine and guarana either ""all the time" or "occasionally." This may be attributed to increased consciousness of the benefits for mental performance, especially given the drastic lifestyle changes resulting from the COVID-19 pandemic, such as working from home. Many people have found more time to cook from scratch and invest time in eating healthier foods as a result of working from home. Since the outbreak of the pandemic, reduced social occasions and movement outdoors has prompted the World Health Organization (WHO) to promote the consumption of vegetables, fruit, pulses, and wholegrain foods in all meals.[2] Popularity around malt and other cereal grain ingredients can therefore be linked to an increased focus on healthier eating.

Source: GlobalData's 2021 Q2 global consumer survey [2] WHO, accessed August 2021

Flavor combinations have been especially innovative in yogurts

Four interesting innovations in dairy

Innovation snapshot | **Featured flavors** | **Featured claims** | **Featured ingredient** | **Featured packaging**

Spar Natur Pur's herb garden organic yogurt, Austria

Why is it innovative?

Formulation: This herb garden variety of organic yogurt from Natur Pur is formulated with 'wiesenmilch', a.k.a meadowmilk. This is milk from cows with access to fresh grass, sun, air, and sufficient space. This taps into trends around purity, ethical consumption and natural positioning.

M&S Food Collection's strawberry clotted cream, UK

Why is it innovative?

Formulation: This launch is the first potted combination of strawberry and clotted cream, reminiscent of the traditional British snack of strawberries and cream with scones. The dairy is sourced from Jersey and Guernsey which taps into localism trends.

Yili Changqin's rose and lychee yogurt, China

Why is it innovative?

Formulation: This product is formulated with lychee and rose jam, as well as Danish lactic acid bacteria. It is also high in fiber. This is a more indulgent and unusual flavor and will appeal to consumers who are looking for a novel flavor combinations.

Ehrmann Almighurt's grape and nut yogurt , Germany

Why is it innovative?

Formulation: In Germany, a grape and nut flavored yogurt was launched. The brand specifically displays that it is formulated using milk from the Allgau. Allgau is a region in Swabia in southern Germany, and the claim establishes its local ties, as well as transparency to German consumers.

Healthy, simple and natural claims helps make post pandemic audiences feel at ease

Featured claims in yogurt and yogurt drink

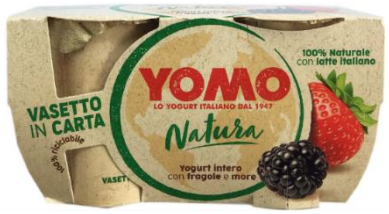
Simple, Natural and Pure – The packaging should ideally also match

Shoppers are looking for healthy, and natural products. 35% of consumer said that the claim 'contains natural ingredients' would most encourage them to buy a food/drink product.[2]

Both product examples given here have one thing in common: their packaging enhances their positioning. This is key to inform the consumer what benefits a product has with simply just the shelf presence. For example, one way to establish natural positioning is by ensuring the packaging is environmentally friendly. In fact, 38% of consumers believe that the environmental footprint of products is now more important as a result of the COVID-19 pandemic, and 13% said this was their top priority.[3] Claims surrounding purity and naturalness lends itself well to packaging considerations.

Vorarlberg Milch's mango yogurt drink, Austria

Recently in Austria, a mango drinking yogurt was launched claiming to only contain 1% fat and is describes as an ideal small snack. The simplicity of the packaging helps underscore the lean fat percentage. Around 4 in 10 consumers (43%) globally say that they are actively trying to reduce their consumption of fats.[1]



Yomo Natura's 'whole' yogurt with strawberry and blackberry, Italy

Available in a 100% recyclable paperboard cup, this yogurt with strawberry and blackberry variant is marketed to have been "made with Italian milk, selected natural ingredients and brown sugar". The raw look of the packaging supports the natural positioning of the product.

Highlighted unusual claim

Packed with vitamins

Ehrmann High Vitamin blood orange yogurt, Germany

This product advertises that it can provide 50% of the daily recommended vitamins by providing vitamin C, D, B6, B9, B12, and the mineral magnesium. It is free from added sugar and lactose, as well as low in fat.

Source: [1] GlobalData 2019 Q3 global consumer survey; [2]] GlobalData 2019 Q4 global consumer survey; [3] GlobalData Coronavirus (COVID-19) Recovery Survey – Week 1-9

Milk protein as a highlighted ingredient has penetrated most dairy categories

Featured ingredient: Milk protein

Powered by protein

Brands have launched many innovative dairy products with high protein content, especially across Europe. These dairy innovations span across several segments, from cottage cheese and kefir to coffee milk and yogurt.

They also tap into ongoing health and wellness trends due to the overall positive health connotation that protein has. More than half of the global population believe that milk protein has a positive effect on the body[1].

Innovation Examples

Oh!'s high protein Cottage Cheese Switzerland

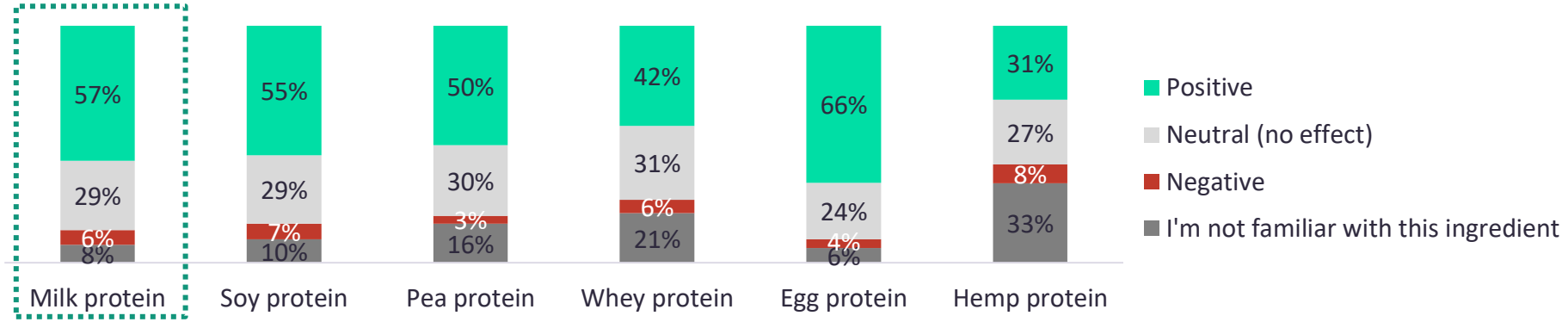
Ehrmann's high protein kefir Germany

Eat lean's high protein cheese UK

M&S Food High Protein's high protein coffee milk UK

Spar High Protein's organic Skyr Austria

Do you think the following ingredients will have a positive or negative impact on your health?[1]



Source: [1] GlobalData 2019 Q3 global consumer survey

Tapping into sustainable and interactive packaging trends

Featured packaging: Yeo Valley Organic super thick kerned yogurt

Innovation snapshot | Featured flavors | Featured claims | Featured ingredient | **Featured packaging**

Description

- Super thick, kerned, strained natural yogurt with 5% fat content. Marketed as "high in protein, low in sugar." The product is packaged in 100% recycled PET.

Innovation features

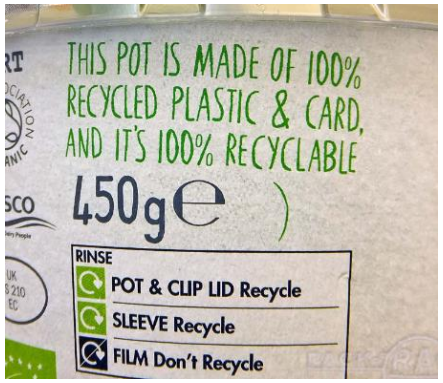
- Introduction of a 100% recycled PET sleeved pot to the UK yogurt market.
- Each pack carries 15 Yeokens, a "digital currency" that can be redeemed for freebies, discounts, and events or donated to charity.

Product details

- Country found : **United Kingdom**
- Manufacturer/distributor: **Yeo Valley Organic**
- Retail price : **2.75 GBP**

Benefits/commentary

- The plastics pot and its lid are both made from 100% recycled PET. The outer sleeve is also produced from recycled board. The use of recycled materials is communicated on the pack sending a clear sustainability message that is likely to appeal to eco-conscious consumers.
- Board outer sleeve features a tear-strip at one side to allow easy separation of the packaging components for recycling purposes. Only the lidding film cannot currently be recycled in the UK.
- The reverse face of the board sleeve is fully utilized for branding purposes. It features an explanation of kerning and how the yogurt is made, as well as instructions for redeeming the Yeokens code.
- The reverse face of the lidding membrane is also used for the brand's Yeokens promotion and is over-printed with a code that can be redeemed online for Yeokens.



Pack dimensions:	Width: 120mm	Height: 88mm	Depth: 120mm	Weight: 450g

Source: Pack-Track

Honey: a natural sweetener can enhance the appeal of chocolate and confectionery

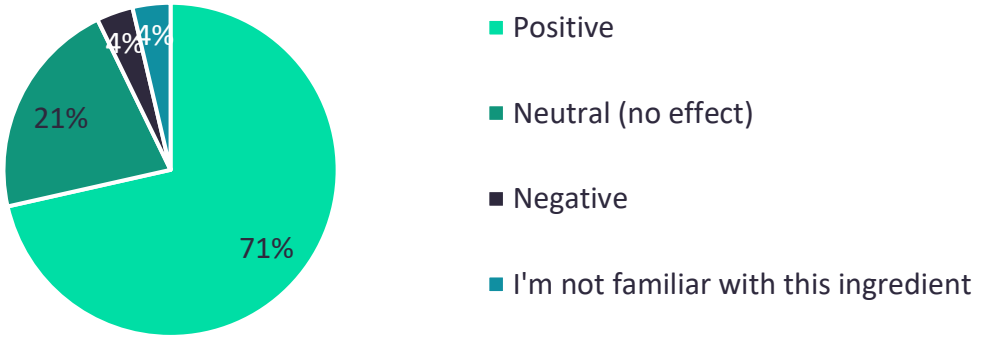
Featured ingredient: Honey

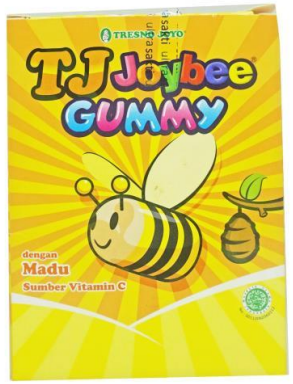
Consumers worldwide have a positive health association with honey

Honey, known for its home remedies (e.g. treating coughs and colds etc.), and has often has the "100% natural" claim attached to it as it is not man-made.[1] This fact poses an opportunity for brands to have honey as the central ingredient for a sugar alternative, as it gives a stronger association to healthy eating than sugar.

In fact, according to GlobalData's primary research, the majority of consumers globally (71%) find that honey has a positive effect on their health[2]. This demonstrates honey's strong value proposition in the product formulation. Though there are risks to honey due to high sugar content (e.g. tooth decay)[1], if honey is carefully included in the formulation, where sugar levels are not too high, it can become a beneficial addition to the product strategy and will be especially appropriate for targeting health-concerned consumers.

Global: Do you think the following ingredients will have a positive or negative impact on your health? – Honey, 2019[2]





PT Yupi Indo honey flavored gummies, Indonesia
This honey-flavored confectionery product is made particularly for children. Its claim to be a source of vitamin C would interest shoppers who wish to improve the intake of nutrients for their kids through more palatable and child-lovable formats like gummies.

Ritter Sport honey nut and yogurt chocolate, Russia and Austria
This chocolate brings an unusual flavor to the category. Its green packaging gives the natural feel the product and using ingredients that are known for their health remedy gives the product the opportunity to target health-concerned consumers as well as adventurous ones.

Source: [1] BBC Good Food, accessed October 2020; [2] GlobalData 2019 Q3 global consumer survey

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Thank you!