

Perceptions of Bakery

Bakery is a Healthy Halo Category in Europe

Key consumer drivers:

- **Naturalness**
- Transparency
- Freshness

Bakery is a restrictive Category in **UK & Ireland**

Key consumer drivers:

- Mindful nutrition
- Convenience
- Indulgence



Answering the Challenges Bakery

Areas already addressed:

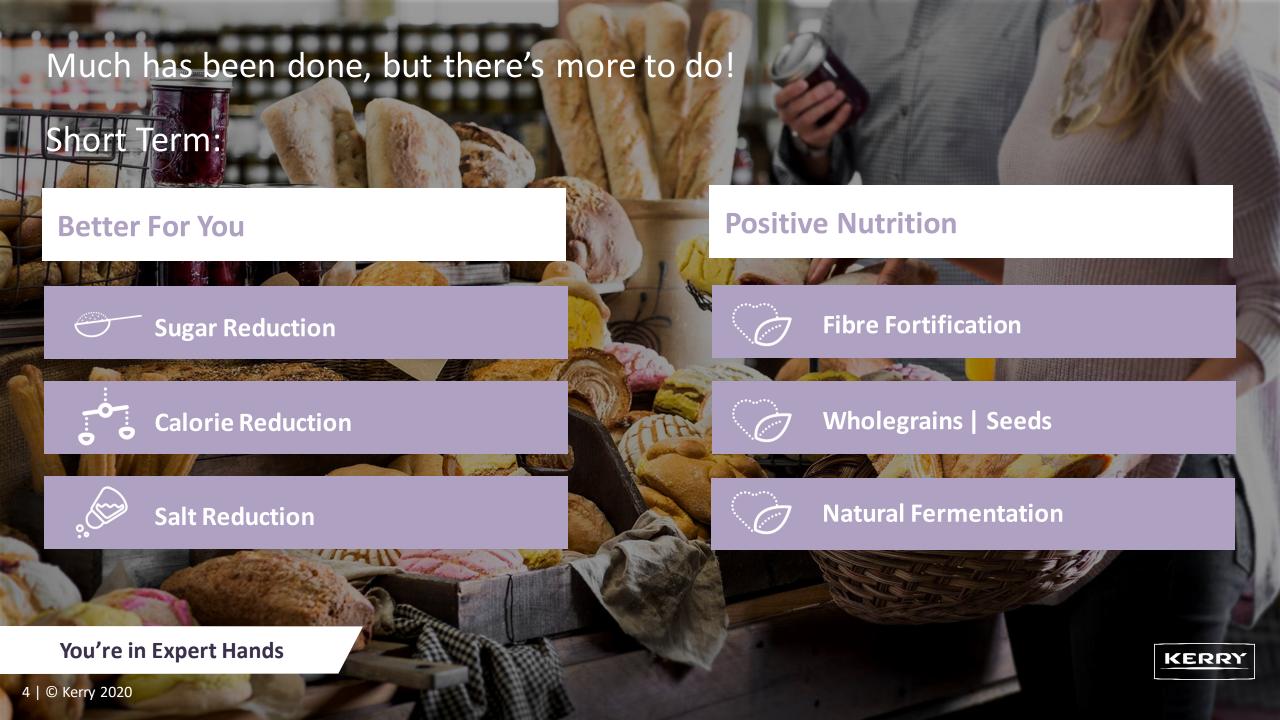
- ✓ Removal of Hydrogenated fats
- ✓ Removal of Trans fats
- ✓ Removal of Potassium Bromate
- √ Replacement of Chlorinated flour

Areas to further address

- √ Salt / Sodium reduction
- √ Sugar reduction
- ✓ Moved to natural flavours
- ✓ Moved to natural colours
- ✓ Reduced the amount of 'E' numbers
- √ 'Natural replacement of Calcium Proprionate
- √ Removal of Aluminium
- √ Gluten Free
- √ Allergen labelling in OOH
- ✓ Reduction of harmful substances







Better For You

DUNKIN.





Positive Nutrition







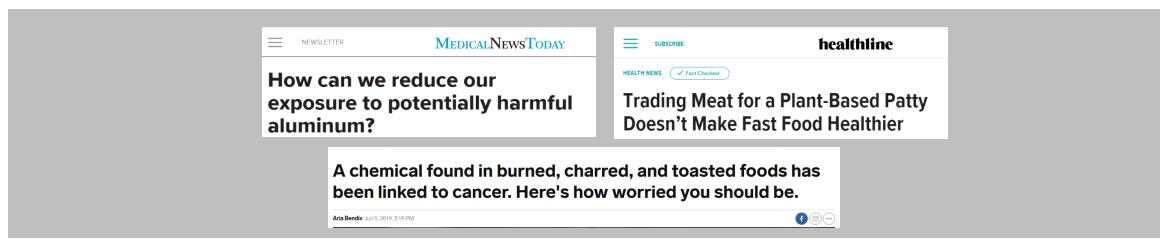


You're in Expert Hands





The Need for Transparency

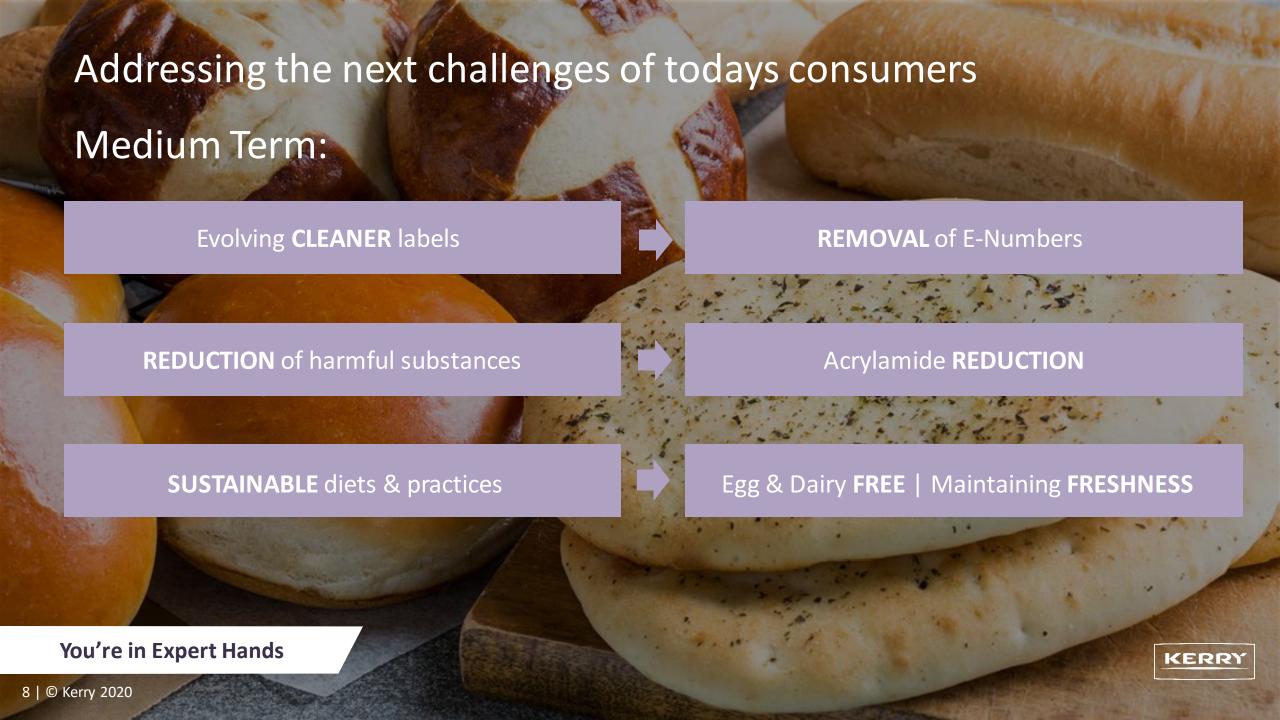




Source: Euromonitor 2017; Harvard Business Review, The New Science of Customer Emotions, 2015







Considering the Impact on "Me" and "We"

- Cleaner ingredients
- Nutritional optimisation
- Food safety





- Sourcing
- Development
- Maintaining Freshness



You're in Expert Hands



Key Takeaways

Short Term

- Better for you bakery
- Positive nutrition



Medium Term

- Ever evolving cleaner label
- Exposure to harmful substances
- Sustainable diets & practices



