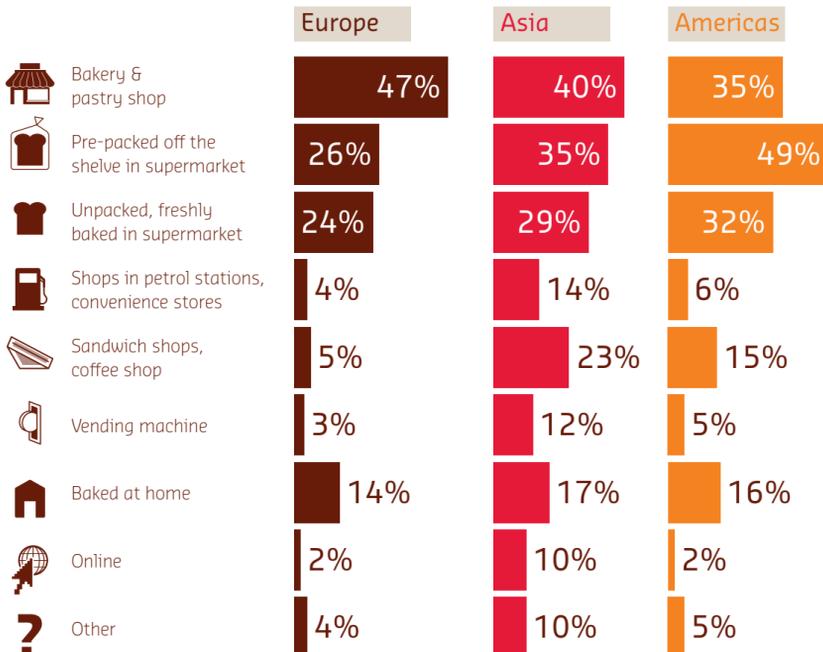


AUTHENTIC BAKERY FEELING

Consumers show a clear preference for bread, patisserie and chocolate concepts that combine sensory and artisanal experiences with convenience.

Where do consumers currently buy their bread?

Charts show where products are bought always or very often. Multiple answers were possible, therefore total % of answers is more than 100%.



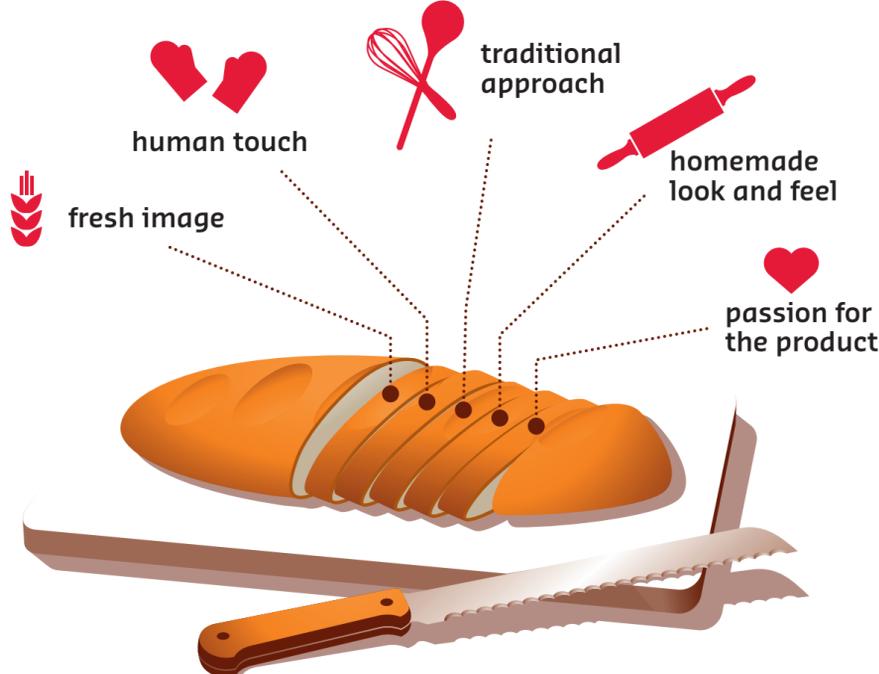
In **Europe** the **traditional** local bakery & pastry shop is **still** favorite.

In **Asia** there is **more variety** in places where consumers tend to buy their bread.

Half of all American consumers frequently buy bread **'pre-packed'** in the supermarket.

The **differences in preferences** between **Europe** and **Asia** are **logical** because the culture of bread & pastry is less **anchored in Asia** than it is in Europe.

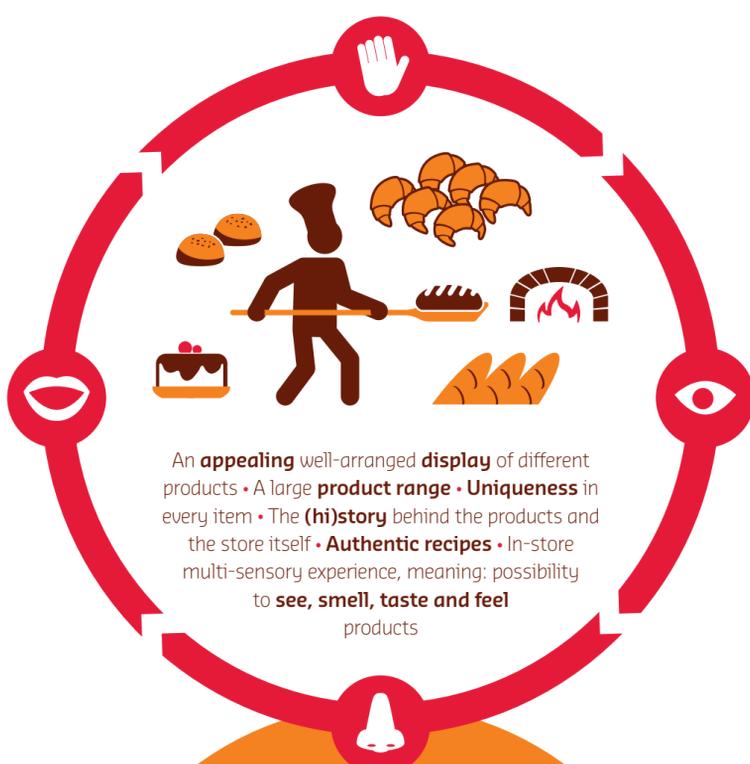
Freshly baked goods let supermarkets close the gap with bakery shops



Consumers become more familiar with artisanal bakery concepts in supermarkets. It is clear that in the future supermarkets will try to stretch themselves to become as close to an artisanal bakery experience as possible.

Create a 360° multi-sensory experience

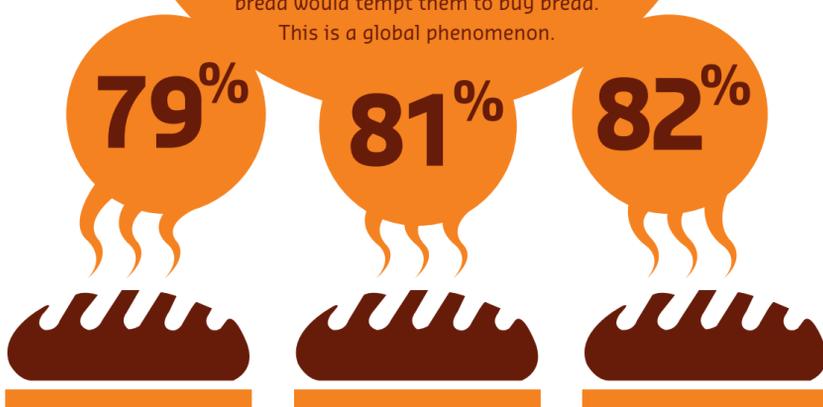
The authentic bakery feeling should be a 360° multi-sensory experience: both on pack and at point-of-sale. Consumers ultimately just want to taste or smell freshly baked bread and pastry.



smelling is Selling

The smell of freshly baked bread is a very effective sales tool, simply because it has been proven that it entices the consumer to buy more.

A majority of the consumers agree with the fact that the smell of freshly baked bread would tempt them to buy bread. This is a global phenomenon.



EUROPE

AMERICAS

ASIA