

Whole Grains Go Global

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Introducing Bimbo Group



Bimbo Brazil
National leader

- **Global expertise** in the national market of baked goods
- **4,000+** direct jobs
- **6 plants** in 5 states
- **1,700+** distribution routes
- **Leading brands**

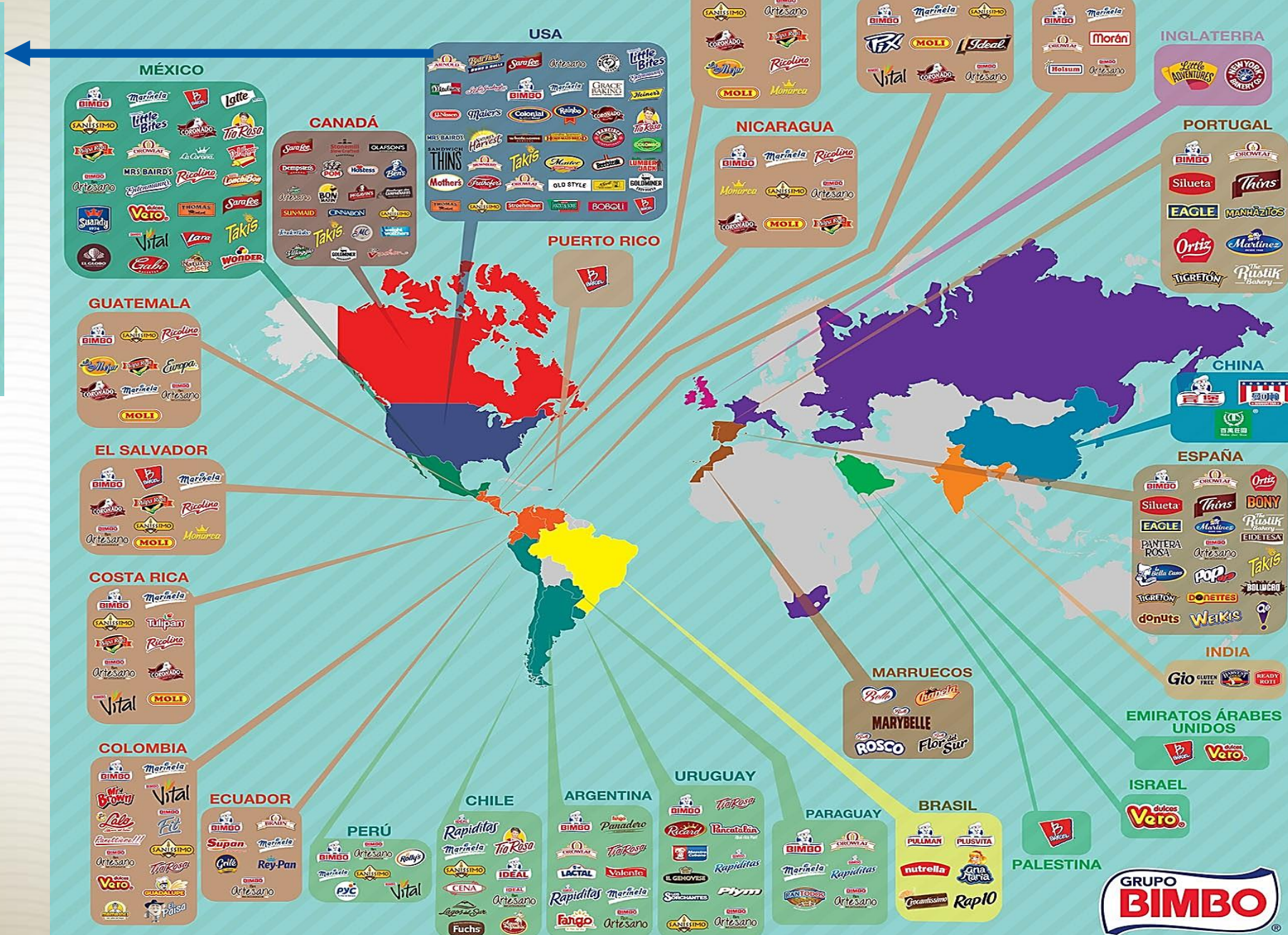


Bimbo Group
Worldwide Leader

- **Revenues: U\$14 billion**
- **Presence in 32 countries**, 4 continents (America, Europe, Africa and Asia)
- **140,000+** employees
- **200+ plants**
- More than **120 brands and 13,000 products**



OUR WORLD ALL BRANDS



Agenda



Introduction:
Sources and research studies conducted



Evolution of consumer habits



How the Brazilian consumer behaves in this market



Trends



Bimbo Group in this context



Evolution of consumer habits



The Brazilian consumer is increasingly looking for products with “**healthy**” appeal, with the goal of **having a better life, through a better diet**

“*I always search for fitness recipes to prepare at home*”

What does this mean?

-  Avoids **high fat, sugar, sodium**
-  Increases the consumption of **fruits and vegetables**
-  Prioritizes whole foods: **bread and rice**
-  Controls **portions of indulgence**

“*I like whole-wheat bread, chia seeds, quinoa... Natural yogurts*”





Qualibest



3,880 participants
> 18 years old

69%

usually eat
whole foods

74%

consider whole foods
more nutritious than
non-whole foods

Studies show that the consumption of
whole foods has become a habit in Brazil
and that consumers can notice

the advantages of the category





Whole foods are increasingly present in the table of the

Brazilian healthy meal



Fruits and vegetables



"Light" fillings for breads: cream cheese, ricotta cream, white cheese



Brown rice, whole grains, cereals



Natural and green juice, teas



Yogurts with muesli



Whole-Wheat Breads



This is reflected on the category of whole wheat breads

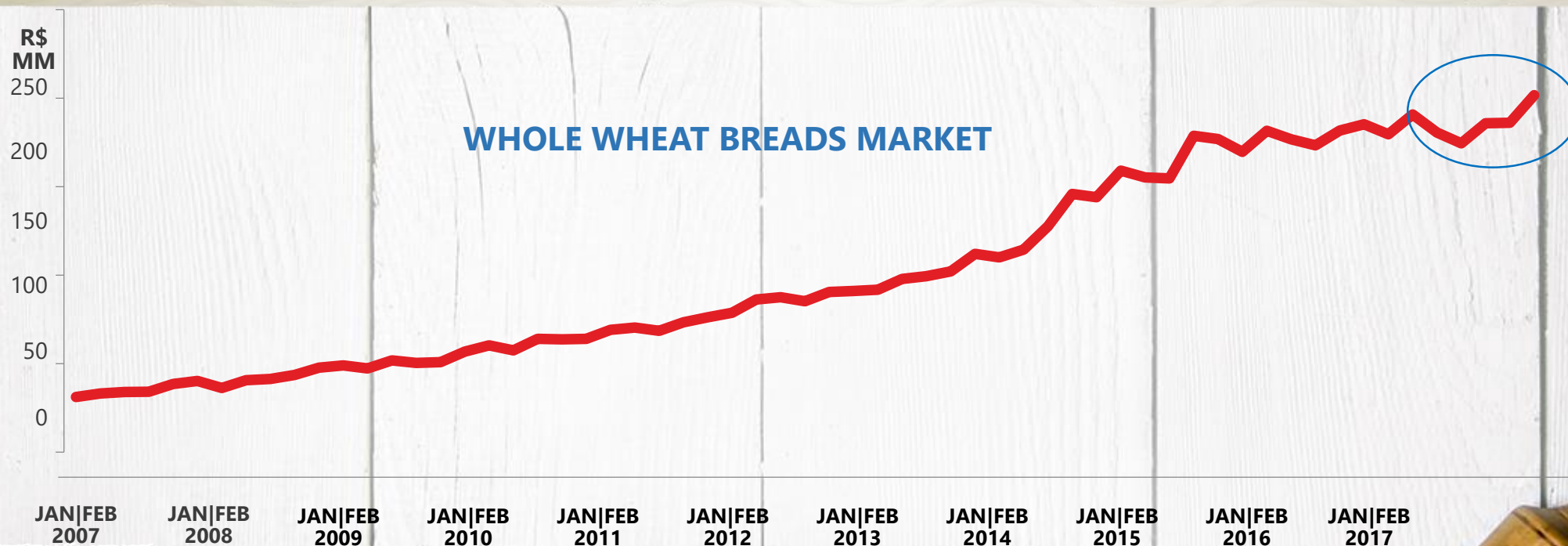


The **consumer increased the search and interest** for whole wheat bread over the past few years



Sales **increased** considerably, **up to two digits**

Consumption increased 6.5x in 10 years



A/C Nielsen



The importance is leveraged by the evolution of our consumers



- The increasing **sophistication of consumers in Brazil** is moving the “healthy” market
- Sales of **healthy foods have increased 98%** over the last 5 years in Brazil!



- More demanding, the **consumer pays attention to labels** and nutritional facts, searches for information online

A close-up photograph of a hand holding a dark chocolate cookie. Another hand is using a butter knife to spread a thick layer of yellow butter onto the top of the cookie. The background is a blurred white plate with some green garnishes. A blue banner with a torn edge is overlaid on the right side of the image, containing white text.

*How the Brazilian consumer
behaves in this market*



Being whole is a basic criterion

for selection for this audience, because they **know the advantages**

Benefits



Sustain, **satiating** for longer, help control hunger



Regulate the **digestion**



Nutritious, enriched with ingredients not usually consumed in the conventional diet



Rich in **fibers**, good for **cholesterol control**



There are many **varieties of flavors**



They are **delicious**



In addition to whole grains,

*the consumer looks for **flavor** and differentiated ingredients...*

- 7, 9, 12, 14, multigrain ... "n" grains
- Oat
- Flaxseed
- Quinoa
- Chia
- Freekeh
- Linseed
- Barley
- Amaranth
- Carrot
- Yogurt
- Honey
- Raisins
- Apple
- Brown sugar





Nuts are valued for their flavor and crunchiness



Considered especially rich and sophisticated

“Very delicious and good for my diet! My nutritionist recommended”





And the industry went along this evolution, offering great diversification of products

- Combinations of **function and flavor** are the top winners
- Consumer looks especially for nutritious products, with interesting texture... **flavor is crucial!**



“I think that I am taking **good care of my health** by buying products with **many grains**”

“**More complete diet**”

“**Like the green juice,** where we mix a bunch of things”



Trends





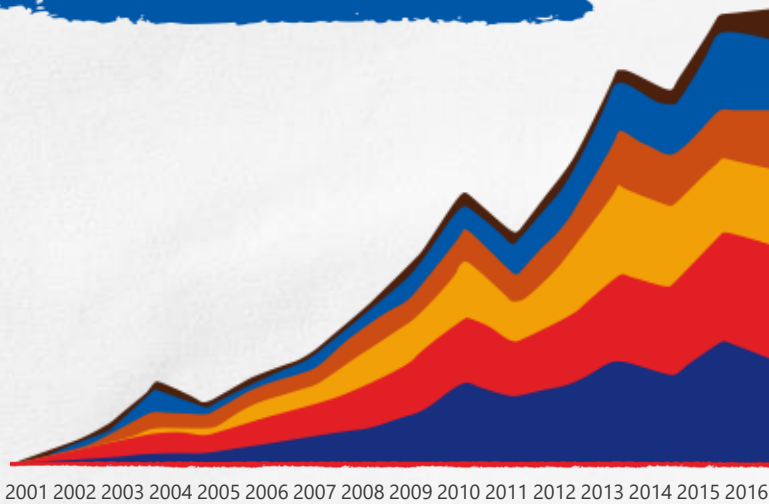
Innovation Trends



Health concerns

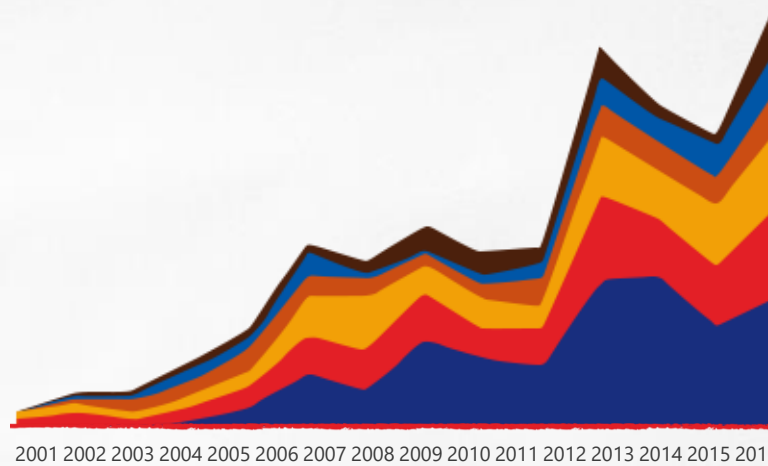
Attributes like “whole,” “high content of fibers,” and “100% natural ingredients” are the most wanted ones

Global launches



- High content of proteins
- Gluten-free
- Low content of fat
- No trans fat
- High content of fibers
- No additives nor preservatives

Brazil's launches



- No added sugar
- Gluten-free
- Low content of fat
- **Whole foods**
- High content of fibers
- No trans fat

In Brazil, “**high content of fibers**” and “**no trans fat**” follow the global positioning. “**Whole foods**” have become more popular over the past few years



Breads ' Trends



Brands are being challenged to **position their products as nutritious** to attend consumers who are eating less bread due to health reasons



One way to do this is **emphasizing attributes** like "whole," "high content of fibers," and "100% natural ingredients"

Barriers to consumption of bread



Source: May 2016

Bimbo Group in this context



In our social role of informing and feeding, we've built the

HEALTHY  **GRAINS**
INSTITUTE

Mission: To offer public information, with scientific basis, on the benefits of consuming whole grains for **health** and **nutrition**, as part of a **healthy** and **balanced diet**

- Founded in 2012, it is directed by a **Scientific Consulting Council**, comprised of experts whose expertise ranges from **human nutrition and health to botanic science and biochemistry**
- **Unbranded initiative from the Canada Bread unit**, one of our organizations
- Shares relevant free contents: videos, fact sheets, infocharts, scientific studies, reply mail, useful links, etc

<http://healthygrains.ca/>



GRUPO
BIMBO



strategic
PRIORITIES





Innovation

- Clean label
- Sprouted grains
- Fiber
- Simple and familiar ingredients
- Cereals, fruits, whole wheat



Commitment with



"health & wellness"



Credentials from GB on Whole Foods:

- **2011 Whole Grains Council Award:**
The biggest acknowledgement from the entity, a benchmark in whole foods, during the **New Standard** conference
- Pioneer in the offer of whole products



Worldwide

- Our products are certified with the **WGC stamp**, endorsing its whole content
- We are one of the companies that offers **most products** with the **WGC stamp worldwide**





*1st
ingredient
on the list!*

To be whole, every product must have at least
51% OF WHOLE-WHEAT FLOUR



This percentage can reach 100%, depending on the flavor profile we want to give the product

Our partnership with WGC



Guarantee of origin

Our Suppliers Management policy that **all of our whole grains suppliers must have the WGC Stamp**

Importance of the Stamps



- Brazilian market has no regulation for whole foods
- We are pioneers in communicating consumers about whole grains



The stamp helps consumers to identify the amount of whole grains per serving in each product. If the product has the stamp on it, it means that it has at least 8 grams of whole grain per portion.



We help to spread the concepts



Pioneer in launching the whole-wheat breads with mainstream appeal



We aim at **disseminating the consumption of whole products**, delivering differentiation in several categories

A top-down view of four hands holding a heart-shaped piece of yellow dough. The hands are positioned around the dough, with two on the left and two on the right. The background is a dark surface dusted with white flour. A blue banner with a red underline is overlaid on the right side of the image, containing text.

And this is **our mission:**

*Delicious and nutritious foods
for everyone!*

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