

The unstoppable rise of alternative dairy milk?

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On Today's Menu

- Glanbia: Ireland largest Dairy & Plant company
- Consumer needs at the heart of dairy evolution
- Consumer markets in plant & health & wellness
- Sustainability to the centre



Glanbia Ireland; A whole nutrition company



#1
Irish Dairy &
Plant
Company

Low intensity
processing at
state-of-the-art
facilities



Exporting to
100
countries



Partner to some of the
world's leading **food**
brands



PROCESSING
1/3
of Ireland's
milk pool



50
years' experience
in nutritional solutions



**SPECIALISED
INGREDIENTS**
for infant
formula
brands



**ADVANCED
PROTEINS**



6,000
family farms in
Ireland



Sustainable dairy and plant are at the heart of what we do. Working with nature, in a unique system.

A unique farming environment.



Irish farming tradition and heritage



Temperate maritime climate



Island location

Which benefits our crops...



Cleanest air in Europe



Pure water & rich soil



Clean label

..and our herd.



Grass fed cows



Animal welfare



Pastured, free range animals

Demand for plant and dairy alternatives starts with consumers, across all life-stages, creating exciting markets.

1995-2015

Generation Z/iGeneration
5-25 years old



Eager to travel
and explore



Focus on physical
activities



Eating
meat free



Least likely to read
nutrition labels

1980-1994

Millennials
26-40 years old



Balancing body
and mind



Concerned about
ethics



Looking for healthy
indulgence



Busy
lifestyle

1965-1979

Generation X
41-55 years old



Favor family
time and
socializing



Strong focus on
mental health



Reducing meat,
alcohol and
caffeine



Natural and
organic foods

1944-1964

Baby Boomers
56 -71 years old



Healthy aging is top of
mind



Increase consumption of
plants



Functional
foods

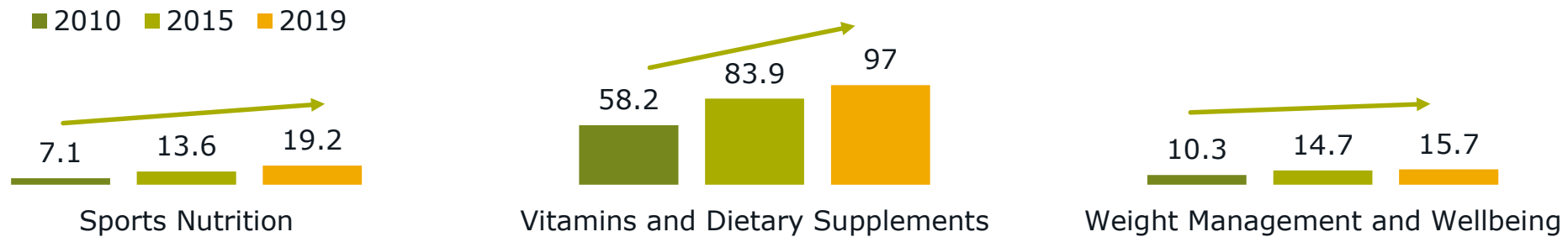


Low sugar, sodium
and fat

The desire for novelty, ethicality, sustainability and nutritional diversity are changing premium markets, and we as nutrition companies are changing with them.

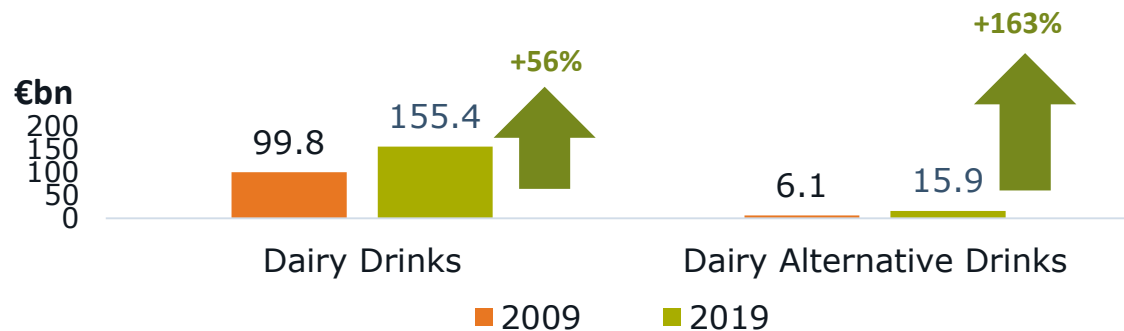
Over the past decade Health & Wellness became personal for consumers, with dairy at the heart and plant emerging.

Health & Wellness: Global market indicators €bn

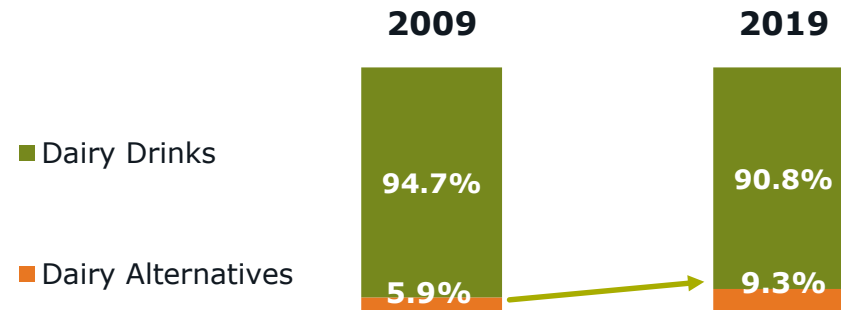


During this time dairy alternative drinks rose to account for €15.9bn in retail sales or (9.3%) of the global dairy drinks market.

Global Retail Sales Value (€bn)



Global Retail Share (%)



Plant is not a fad but also not the end of dairy. Plant products are helping evolve the nutrition category, and are providing more consumer choice.

However, the industry must be more sustainable, its not dairy or plant,
its the right dairy and the right plant providing sustainable nutrition.

Glanbia: Dairy



Glanbia: Oats & Ancient Grains



Sustainable processes, quality controls, eco system management and ethical care for our land and animals must be at the heart of our businesses. Companies that fail to act sustainably will fall to the way side.

For plant independent verification across core measures is key to consumer trust.



GLUTEN FREE



**PRODUCT
QUALITY**



NON-GMO



**ENVIRONMENTAL
SUSTAINABILITY**



**SOIL AND GRASSLAND
MANAGEMENT**

Certified by globally recognised bodies



For dairy independent verification across core measures is key to consumer trust.



**PRODUCT
QUALITY**



**COW AND MILK
TRACEABILITY**



**ENVIRONMENTAL
SUSTAINABILITY**



**SOIL AND
GRASSLAND
MANAGEMENT**



Origin Green and
Sustainable Dairy
Assurance Scheme

ecovadis

ISO 17065
Awarded Gold CSR Rating
and ranking in Top 1% of
all suppliers assessed



The only label that guarantees
animals are raised outdoors
on pasture for their entire lives on an
independent farm using
truly sustainable, high-welfare
farming practices.



Certified Kosher
and Halal