

nielsen

BIO TRENTINO IN GERMANY: ANALYSIS AND DEVELOPMENT OF MARKET POTENTIAL

Executive summary

Nielsen Consumer Insights

February 2019

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OBJECTIVES AND METHODOLOGY

OBJECTIVES



The **Trentino Sviluppo** company is committed to **fostering the sustainable growth of the Trentino system** by promoting the territory as a whole, from the **tourism** sector to **innovation** supported by companies and to the **development of production chains**.

Trentino Sviluppo asked Nielsen to carry out a research to **monitor the bio trends in Germany** and the **potential of Trentino-bio products** in this market, in order to inspect:



- *Trentino awareness and reputation in Germany*
- *Value of the Germany bio market and purchase behaviour*
- *Best bio Trentino products and ITB*



METHODOLOGY



n=1.500 interviews representative of the population in terms of gender, age and geographic area

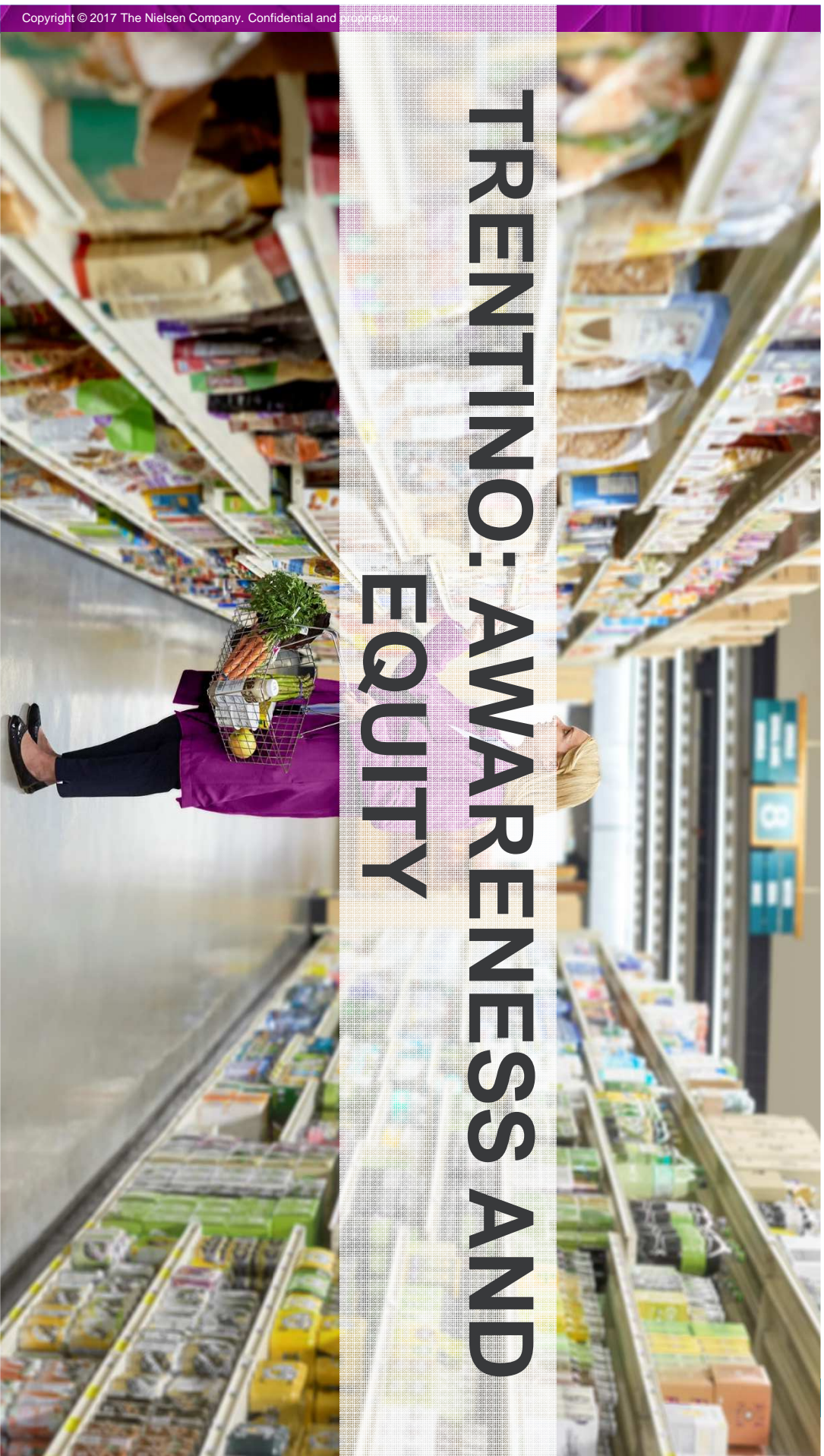


Structured online questionnaire
(C.A.W.I. - Computer Aided Web Interviewing)



Fieldwork conducted in **January 2019**

TRENTINO: AWARENESS AND EQUITY



TRENTINO: AWARENESS AND EQUITY

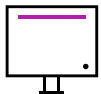


60% OF GERMAN CONSUMERS
HAVE SOME KNOWLEDGE OF TRENTINO



THEY KNOW TRENTINO MAINLY BY...

33%



TELEVISION

32%



I HAVE BEEN
THERE

24%



INTERNET



BEAUTIFUL LANDSCAPES (62%) AND



GOOD QUALITY FOOD (57%) ARE THE

MAIN DISTINCTIVE TRAITS OF TRENTINO
BRAND EQUITY...

...AND ANOTHER IMPORTANT ASSET IS **TRADITION** → IT IS

THE MAIN ASSOCIATION WITH **TRENTINO** FOR **63%** OF
GERMAN CONSUMERS.

BIO MARKET IN GERMANY



BIO MARKET IN GERMANY



ALMOST 5 BILLION €
IS THE VALUE OF BIO MARKET IN GERMANY AND
IT GROWS IN ALL ITS CATEGORIES



38% OF GERMAN CONSUMERS THINK IT'S
IMPORTANT TO CONSUME BIO FOOD



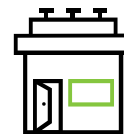
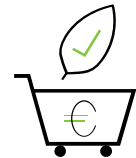
ABOUT **2 TIMES A WEEK** IS THE AVERAGE
FREQUENCY OF CONSUMPTION...

...AND THE **TREND IS INCREASING** FOR
47% OF RESPONDENTS



ON AVERAGE, BIO IS WORTH **30%** OF THE
SHOPPING CART...

...AND **70%** OF PEOPLE IS WILLING TO PAY
SOME **EXTRA MONEY** (+12% ON AVERAGE)
FOR IT



HYPER AND SUPERMARKETS ARE BY FAR
(68%) THE MAIN **PURCHASE CHANNEL**

WHAT DRIVES BIO CONSUMPTION?

REASONS FOR CONSUMPTION

BIO CONSUMPTION IS MAINLY DRIVEN BY...

- ...A HIGHER RESPONSIBILITY IN ANIMAL BREEDING (47%)
- ...THE NATURALNESS OF BIO FOOD (42%)...
- ...AND ITS ECO-FRIENDLINESS (38%) ...



DRIVERS OF CHOICE

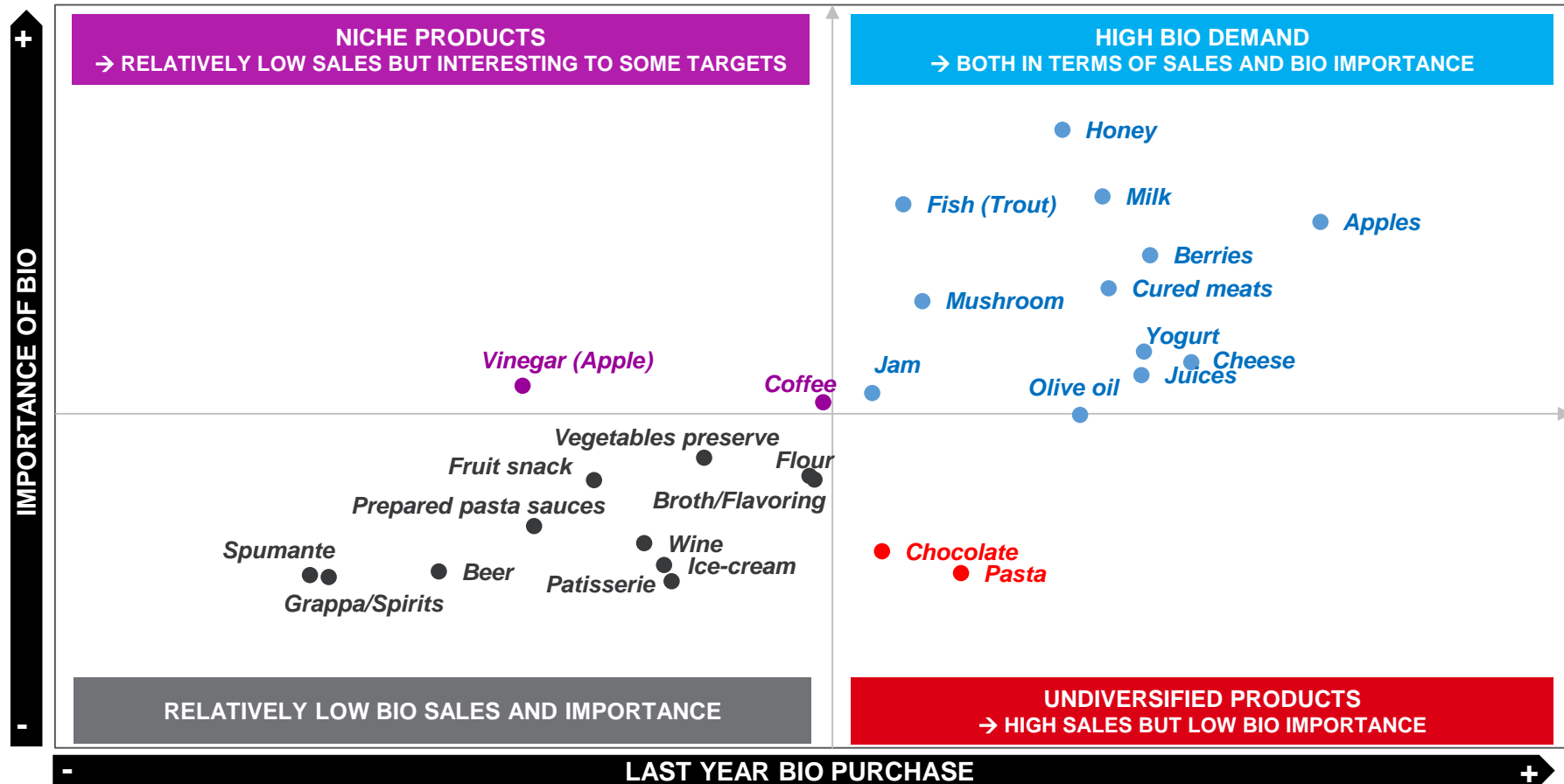
...WHILE IN PURCHASING BIO FOOD, GERMAN CONSUMERS BASICALLY SEEK FOR TASTY (38%), FARM-TO-TABLE (51%) AND SEASONAL (38%) PRODUCTS.

BARRIERS



BY CONTRAST, THE FEW NON-BIO CONSUMERS (3%) THINK BIO FOOD COST IS TOO HIGH FOR A PRODUCT THAT IS NOT SO DIFFERENT FROM THE SAME NOT BIO.

BIO GERMAN MARKET MAP

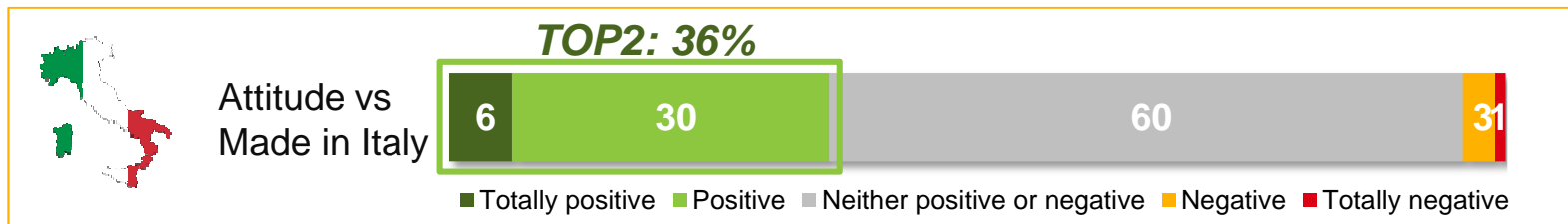


BIO TRENTINO PRODUCTS

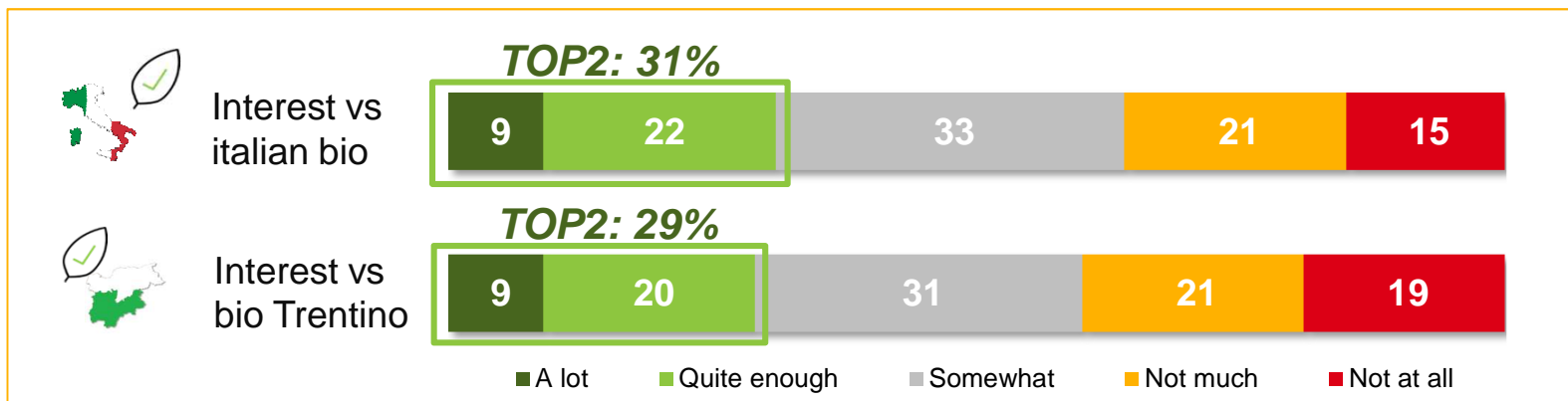


MADE IN ITALY: ATTITUDE AND INTEREST

ATTITUDE TOWARDS MADE IN ITALY IS **GOOD**, WITH **ALMOST NO REJECTORS**...



...AND DESPITE SOME RESISTANCE TOWARDS ITALIAN AND TRENTINO BIO, ALMOST **ONE RESPONDENT OUT OF THREE** SHOWS **INTEREST IN THESE PRODUCTS**.





BIO TRENTINO: DRIVERS & BARRIERS

HIGH INTEREST IN
BIO TRENTINO



REASONS FOR INTEREST



MAIN REASONS FOR INTEREST INCLUDE THE **TASTE** (→ THE FIRST BIO PURCHASE DRIVER) AND **QUALITY** OF TRENTINO PRODUCTS.

THERE IS ALSO A **GOOD AMOUNT OF TRUST** IN **ITALIAN** AND **TRENTINO BIO**.



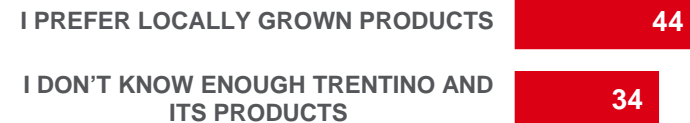
MEDIUM/LOW INTEREST
IN BIO TRENTINO



BARRIERS



WHILE LOW INTEREST IS ESSENTIALLY DUE TO A PREFERENCE TOWARD **LOCALLY GROWN** NATIONAL PRODUCTS, BUT ALSO TO A **LACK OF KNOWLEDGE ABOUT TRENTINO AND ITS PRODUCTS**.



TRENTINO BIO PRODUCTS: AWARENESS & ITB



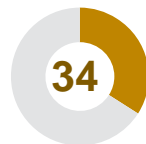
WINE, APPLES, CHEESE, OLIVE OIL AND PASTA ARE THE BIO TRENTINO PRODUCTS WITH THE **HIGHEST AWARENESS** (KNOWN BY ALMOST ONE GERMAN CONSUMER OUT OF THREE). THEY ARE ALSO THE PRODUCTS WITH THE **HIGHEST INTENTION TO BUY**.

AWARENESS

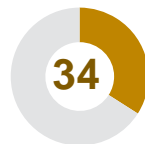
**INTENTION
TO BUY**



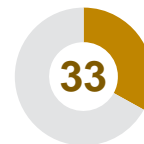
WINE



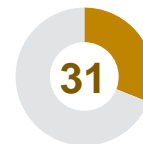
APPLES



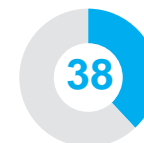
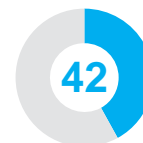
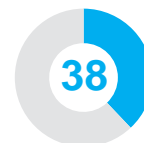
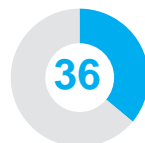
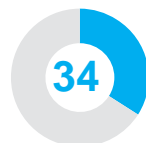
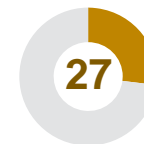
CHEESE



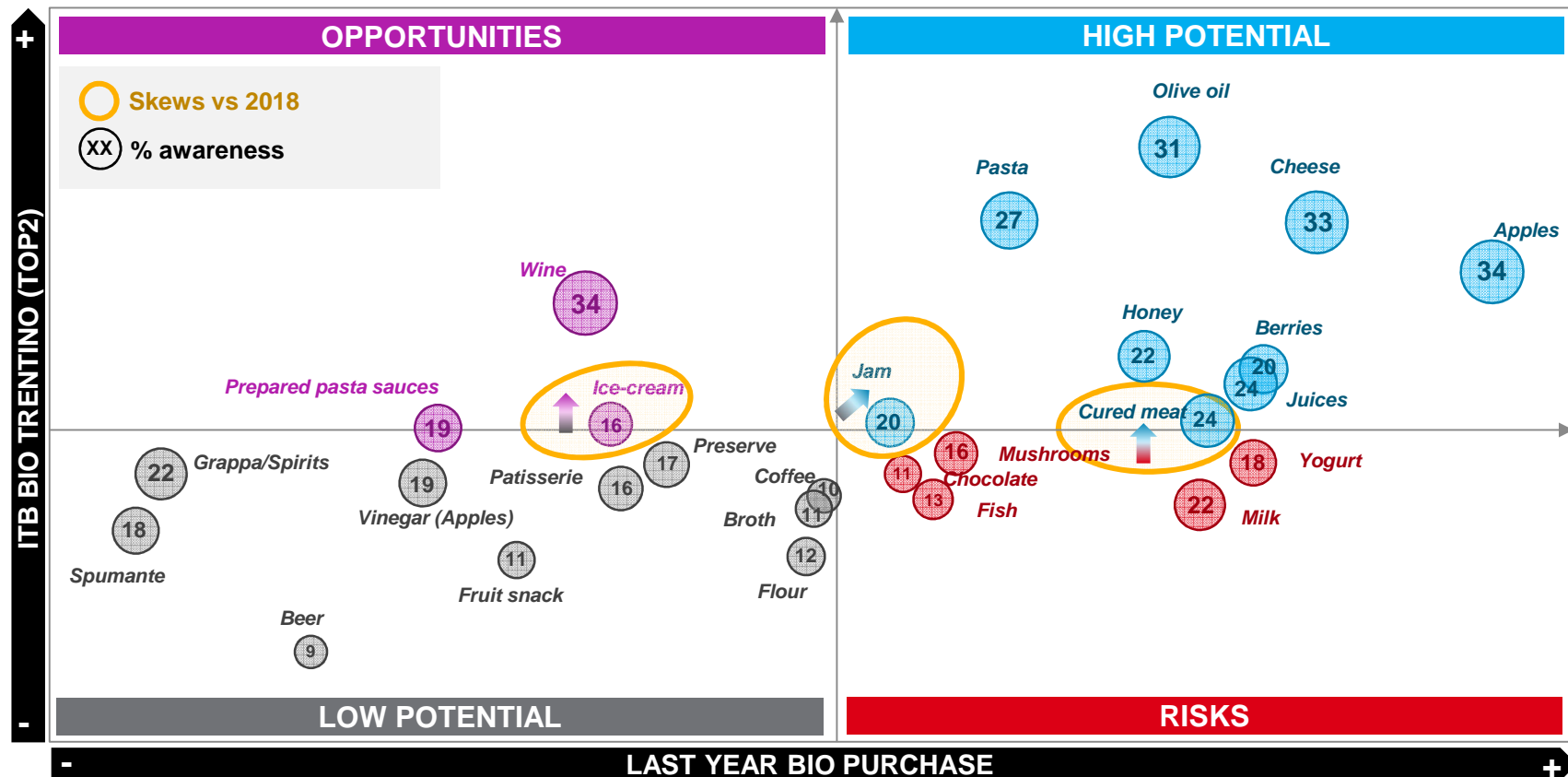
OLIVE OIL



PASTA



BIO TRENTINO OPPORTUNITIES MAP





BIO TRENTINO PRODUCTS POTENTIALITY



Apples



Cheese



Olive oil



Pasta

- THEY STAND OUT FOR THE **HIGH BIO DEMAND** AND **INTENTION TO BUY**, THEY ALSO HAVE AN **AWARENESS OVER THE AVERAGE** → FOR THESE CATEGORIES TRENTINO PRODUCTS ARE MORE INTERESTING THAN GERMAN ONES.



Wine

- DESPITE A LOWER BIO DEMAND, THERE IS STILL SPACE FOR IT, ALSO THANKS TO THE GOOD MADE IN ITALY REPUTATION → THE **TRENTINO BIO WINE AWARENESS** IS INDEED **ONE OF THE HIGHEST** AND THE **INTEREST IS GOOD**.



Berries



Honey



Juices

- THEY HAVE AN **HIGH BIO ATTENTION** (EXPECIALLY HONEY) AND AN **INTENTION TO BUY OVER THE AVERAGE** → HOWEVER, THE **AWARENESS** NEEDS TO BE INCREASED

PURCHASE CHANNELS

EVEN IF **GDO** IS THE **MAIN EXPECTED PURCHASE CHANNEL** FOR BIO TRENTINO PRODUCTS, GERMAN CONSUMERS WOULD LIKE TO FIND THEM ALSO IN **SPECIALIZED BIO STORES** AND **ONLINE**.

70%



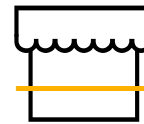
**HYPERMARKETS/
SUPERMARKETS**

47%



**SPECIALIZED
BIO STORES**

31%



**LOCAL
MARKET**

28%



ONLINE

