New Consumer Drivers, Demands & Directions for Growth

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Chicago Supplier's Night
November 11, 2015

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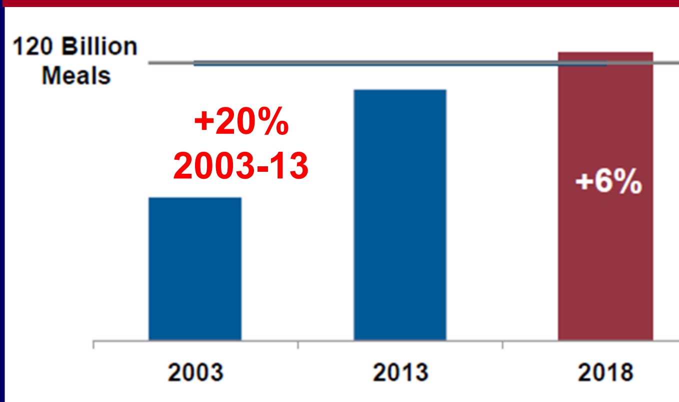
1. Mega Trends: Redirections
2. Re-thinking Natural
3. Culinary Cues
4. The New Nutrition

Fresh, Minimally Processed

Fresh Eatings +20% Past 10 Yrs, +6% → 2018[1]
78% *Effort* Eat Fresh, Fresh Convenience[2]

Proj. Annual Fresh Food Eatings[1]

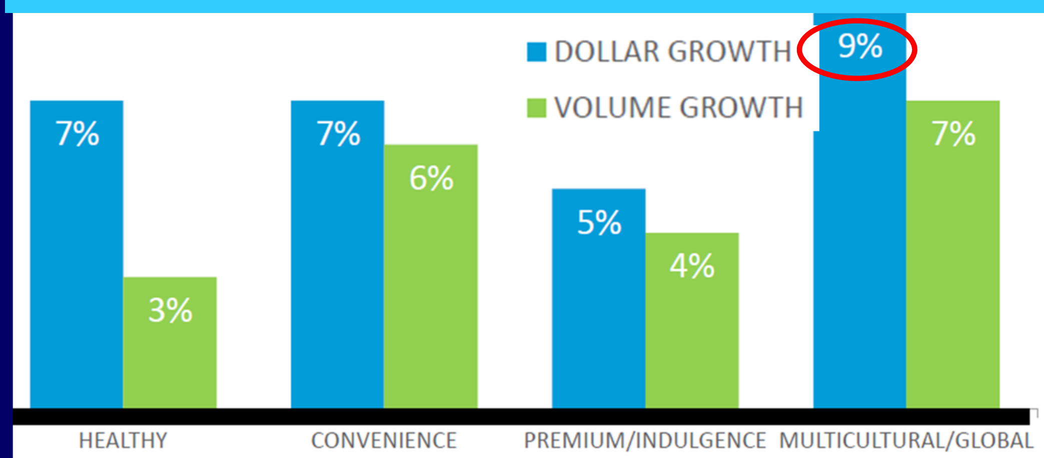


By 2018, Fresh Growth at Breakfast +9%, Lunch 7%, Dinner 5%[1]

- 87% fresh = healthier, 80% tastier[3]
- 44% buy more fresh ingredients, +10% 3 Yrs[4]
- 47% cook more from scratch, 3.1 dinners/wk[4]
- Deli prep foods; produce/protein snacks soar![5]

Fresh Prepared Sales > Grocery, Foodservice → 2017[6]

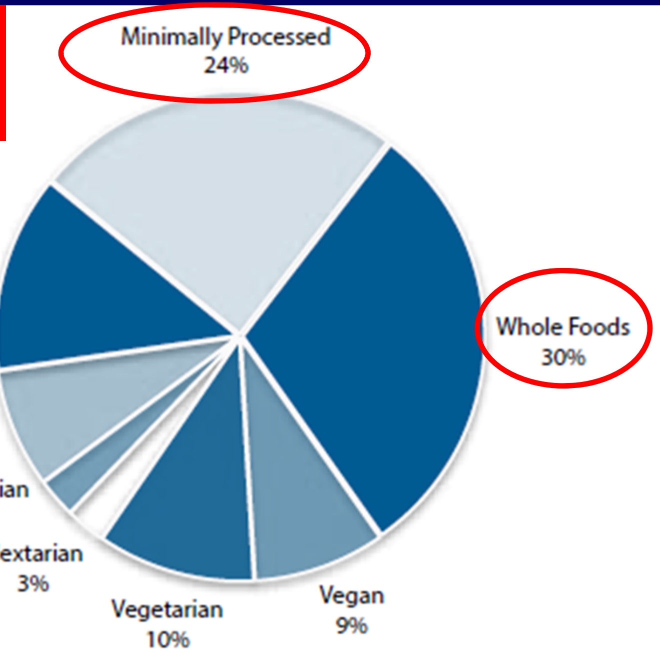
Fresh Convenience, Exotic Fresh Fastest Growth[5]



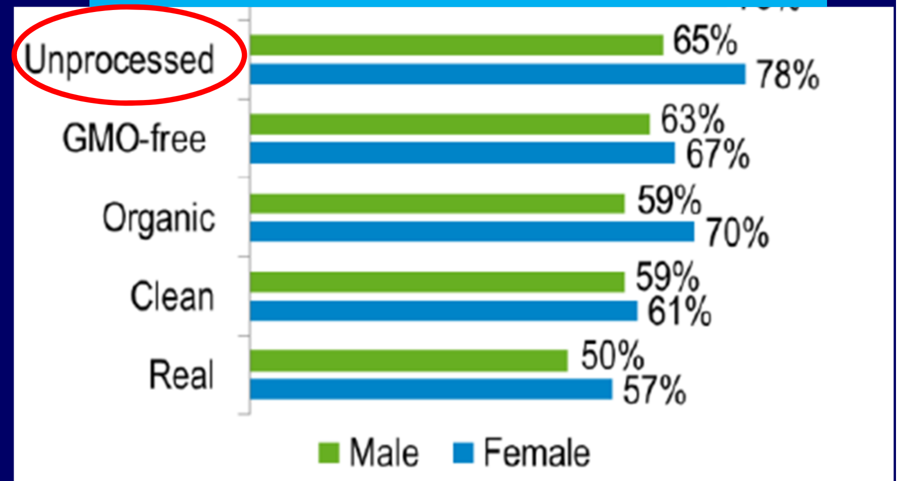
1. NPD Group, National Eating Trends, 2014; 2. 4. 2014 Gallup Dinner Survey; 3. Technomic, Inc. Healthy Eating Consumer Trend Rpt, 2014; 4. FMI, U.S. Grocery Shopper Trends, 2015;; 5. Nielsen/Perishables FreshFacts, 2015; 6. AT Kearny/Technomic, Fresh Prepared Foods, 2014

30% Making a ***Strong*** Effort Eat More Minimally Processed Foods, +8% vs. 2010[1]

Consumer Lifestyles[2]



Food that is ____ is healthy…[3]



Overall Hot Culinary Trends for 2015, ACF Chefs[4]

1. Locally sourced meats and seafood
2. Locally grown produce
3. Environmental sustainability
4. Healthful kids' meals
5. Natural ingredients/minimally processed food

1. 2014 Gallup Study of Nutrient Knowledge & Consumption; 2. Nutrition Business J., 2015:; 3. Technomic, Healthy Eating Consumer Trend Report, 2014; 4. NRA, What's Hot Chef Survey for 2015? 10/2014.

New: Fortification of Fresh Foods, Nutrition Claims
Those Buy More Fresh = Buy Healthy, Fortified

Link Health Benefit Fresh Meat/Poultry[1]

29%	Avoiding empty calories	35%
56%	Balanced diet	65%
18%	Building bone density	11%
13%	Building immunity	12%
44%	Building physical strength	32%
18%	Digestive health	22%
28%	Healthy weight	57%
23%	Heart health	46%
26%	Mind health/happiness	25%
70%	Nutrients in diet (iron, protein, etc)	59%
50%	Providing energy	43%

Hispanics Spend $452 More/Yr on Food; 41% is Fresh[2]

1 in 5 Best-selling New Foods/Bev 2013 : Fresher Flavor Claim[3]

Gen Y Lead Growth Fresh Eatings 2018 +7.5%, Gen Z +11%[4]

Fresh Nutrient Content Claims

Fresh 100 Calories or Less

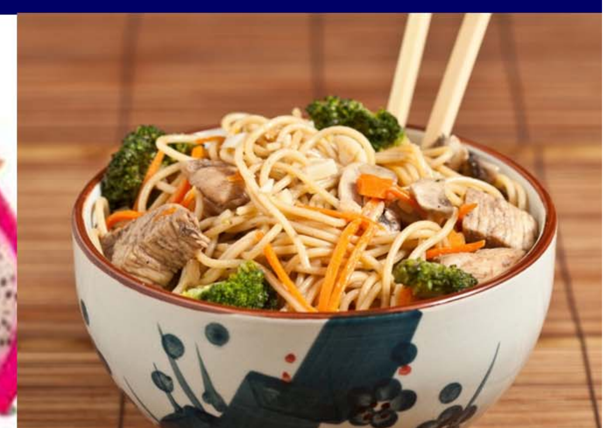
Center Store "Fresh" Ingredients

Technology: HPP Juice, Coffee, Oils

1. Food Mktg. Inst., Power of Meat, 2015; 2. Nielsen, Hispanics 360, 2015; 3. IRi, New Product Pacesetters, 2014; 4. NPD, National Eating Trends, 2014.

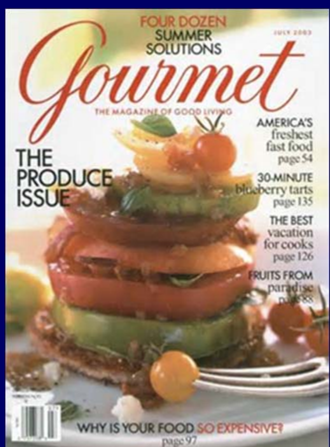
Discovery





New Upscale Eating Occasion, 48% Foodies
145M Buy Specialty Foods,[1] 96M Everyday Use[2]

41% Adult, 33% Snack & 29% Kids' Eating Occasions = More Upscale Culinary Experience – More Fresh Foodie Narratives, Unique Flavors[1]



Discovery is a New Food Attribute[3]

- Value
- Safety
- Convenience
- Health
- Enjoyment
- Discovery

Specialty Food Sales $105B + 22% - 2 Yrs[2]

Cheese #1, Top Growth Refrig. Pasta[4]

Top 10 Eating Occasions[1]

- Instrumental afternoon snack 10.5%
- Instrumental lunch 10.1%
- Instrumental dinner 9.6%
- Instrumental breakfast 9.4
- Savoring dinner 9.3%
- Savoring after dinner snack 7.1%
- Instrumental after dinner snack 6.3%
- Instrumental morning snack 5.9%
- Savoring lunch 5.8%
- Savoring breakfast 5.3

Top 10 Savoring Demand: Upgrade[1]

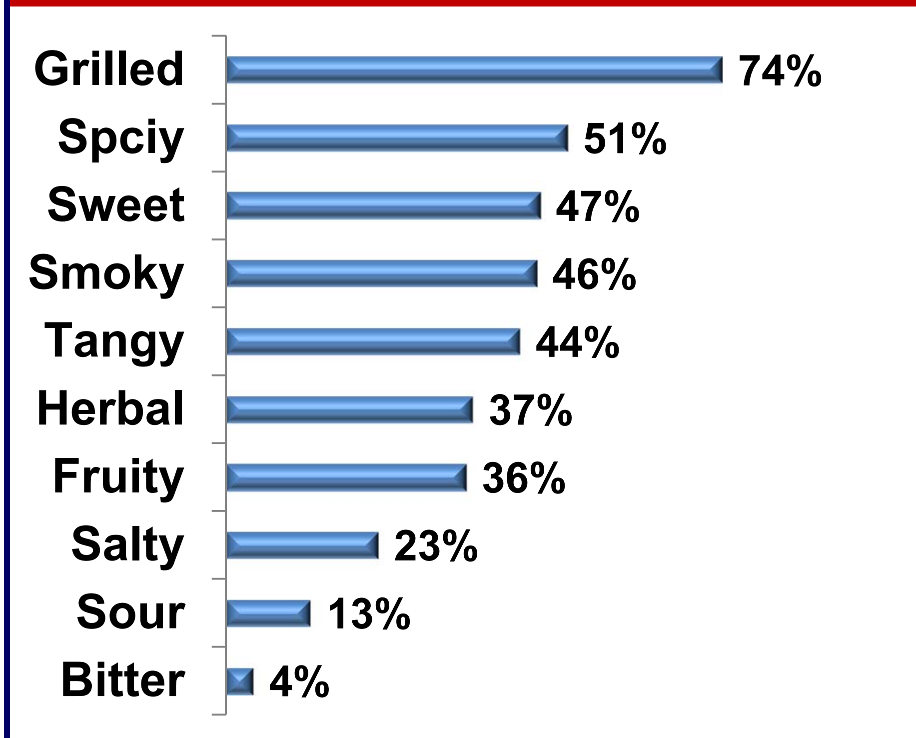
1. Rice
2. Chinese Food
3. Salads
4. Eggs
5. Beans
6. Hamburger
7. Potatoes
8. Vegetables
9. Sweets
10. Meat Cuts

36% Buy Gourmet Everyday Snacking[1]

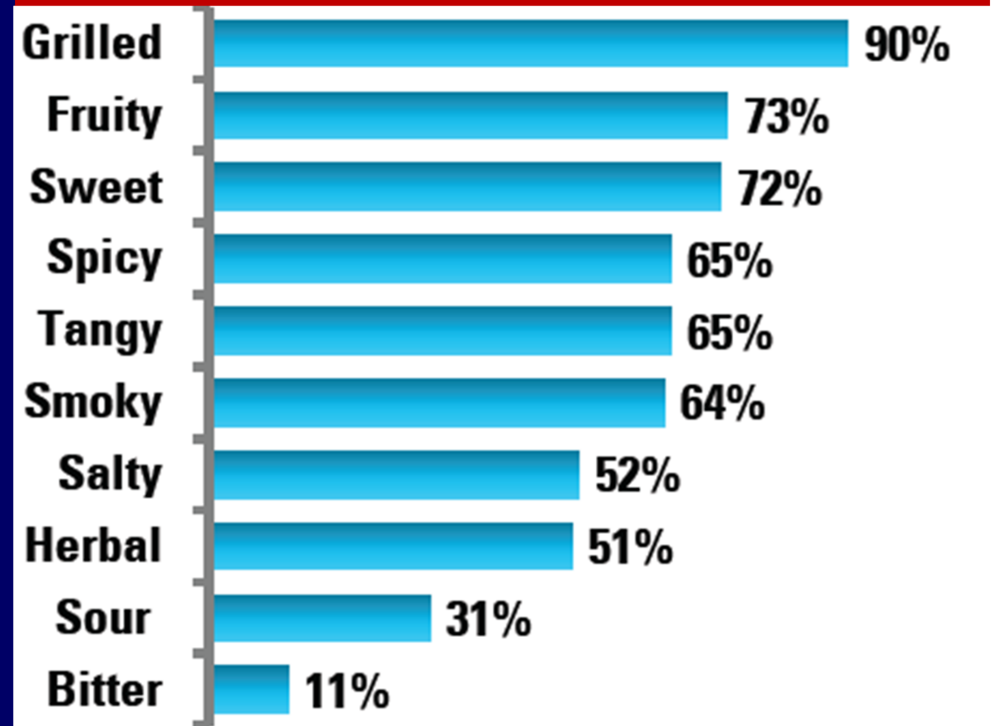
1.The Hartman Group, Modern Eating Report, 2013; 2. SFA, Specialty Food Consumer, 2014; 3. FMI, U.S. Grocery Shopper Trends, 2014; 4. SFA, State of the Specialty Food Industry, 2015

Dramatic Shift U.S. Flavor Profile 5 Years

Consumers Favorite Flavors 2009



Consumers Favorite Flavors 2013



- Preference Hot & Spicy Up Dramatically 18-34
- Bold Up
- Interest Coupled Flavors Up
- Interest Ethnic Up 18-34
- **Interest in New & Unique Flavors Down!**

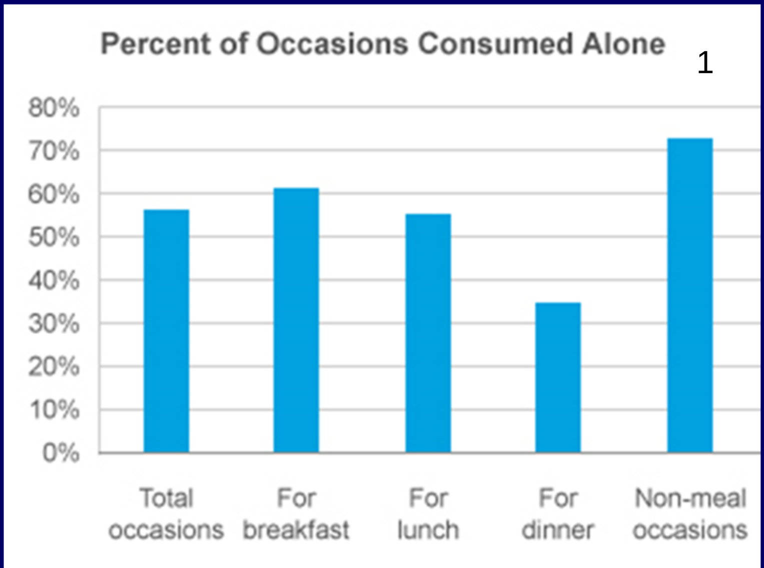
Hot '15

Technomic, Consumer Flavor Trend Reports, 2013, 2009

Lifestyle Logistics



½ Eating Occasions Alone, More Fresh/Fancy, Demise Family Meal, Rise Kid-Specific



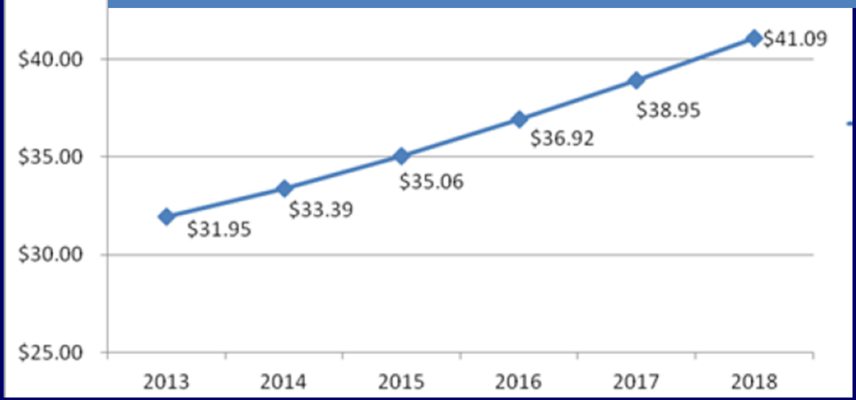
- 39% eating occasions family HH alone[2]
- 28% family eating occasions = Kids
- Nesters #1, Singles #2, Married/Kid #3

2

Best-Selling New Foods/Bev 2013[3]

Gourmet & Ethnic Meals for Kids Top Culinary Trends 2015[5]

Kids' Food & Bev to $41B 2018[4]



HH Size 2.6 vs. 3.1 in 1970[5]

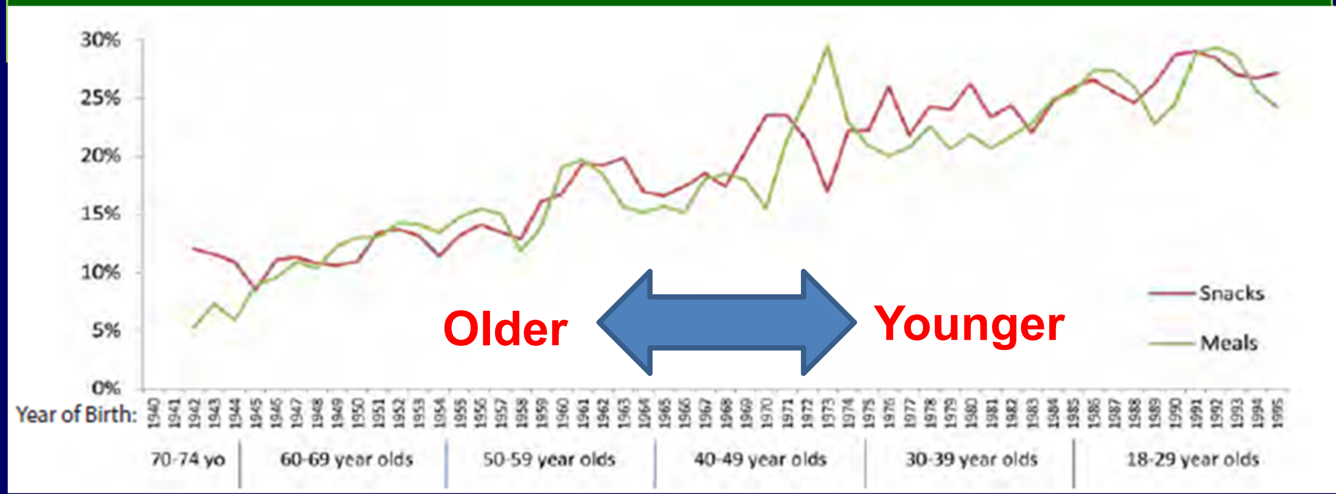
1. NPD Group, Press Release 8/6/14; 2. Hartman Group, Modern Eating Report,/Compass Database, 2013/14; 3. IRI, New Product Pacesetters, 3/2014; 4. Pkg. Facts, Kids' Food & Bev Market, 2014; 5. NRA, What's Hot? Survey, 2014

Immediate Consumption; Men Shop/Cook

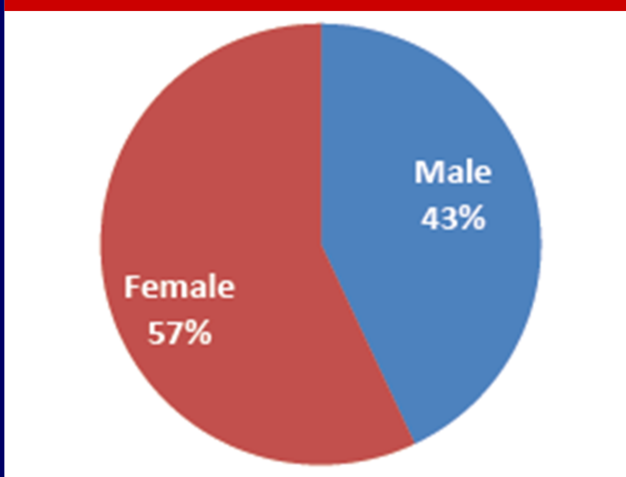
15% of All Food/Bev Eaten Within 1 Hour of Purchase[1]

40% of Gen Y Purchases are IC; 2/3rd Snacks; 10% Breakfast

Meals/ Snacks Eaten Same Day as Purchase by Age[1]



Primary Food Shoppers: Gender[2]



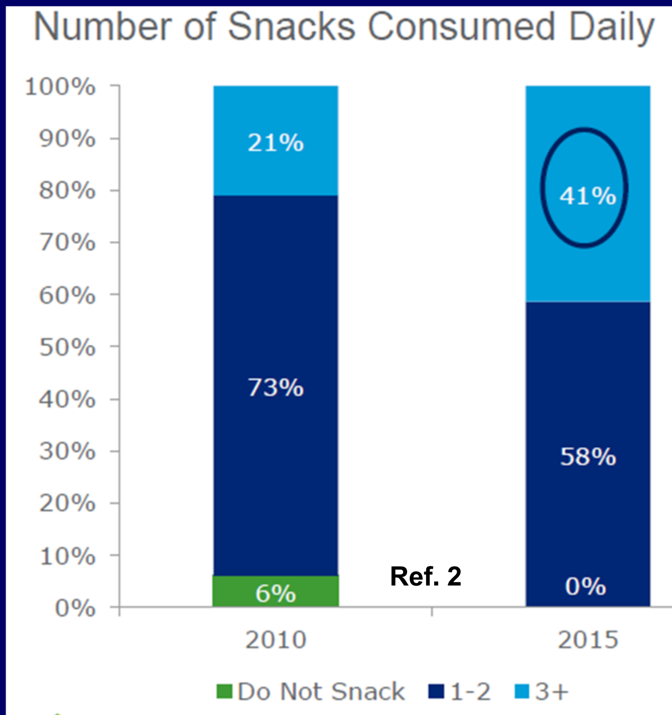
46% Men Help With Food Prep 2014[3]

Men More Likely to:[2]

- Ethnic Foods
- Spicier
- Experimental
- Breakfast
- Grilling
- Marinades

1. Hartman Group, Modern Eating Report,/Compass Database, 2013/14; 2. FMI, US Grocery Shopper Trends, 2015; 3. Gallup Study of Cooking Knowledge and Skills, 2014.

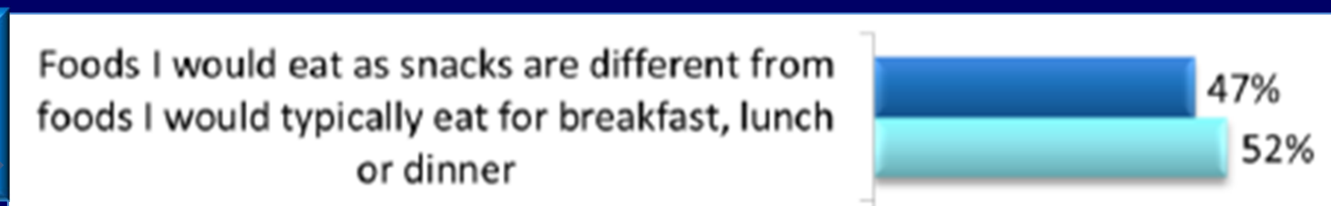
49% Eating Occasions Snacks, Indulgent Outpaces Healthy, 3.1% vs. 2.4, 1st Time 6 Yr[1,2]



- Chips, chocolate, cheese, cookies, fruit 1-5[2]
- Fruit chips, jerky, RTE popcorn, jerky, seeds big gains, savory > sweet
- 14% eat snacks breakfast, not mega trend Depends on definition snack
- 1/3 buy gourmet snacks for every day use[3]
- 1/2 health important, organic snacks +11.6%; fresh produce, smoothies, nuts/butter, yogurt covered, trail mixes top growth healthy snacks

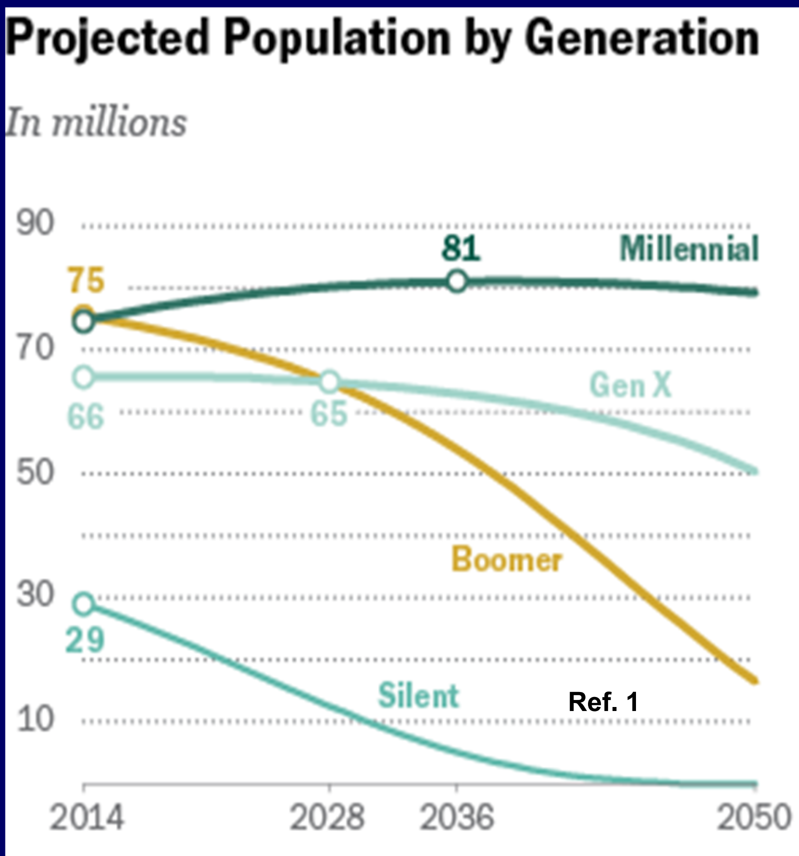
Type of Oil Hot Claim

Want Different Foods For Snacks than Eat for Meals[4]

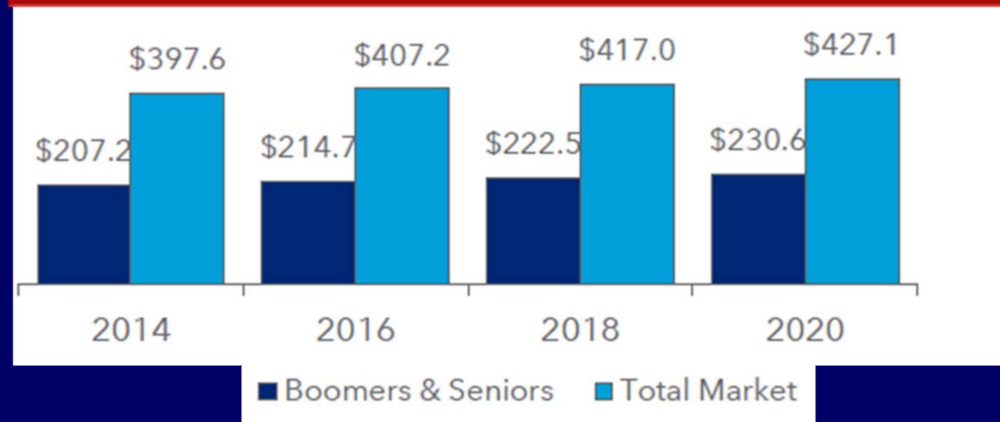


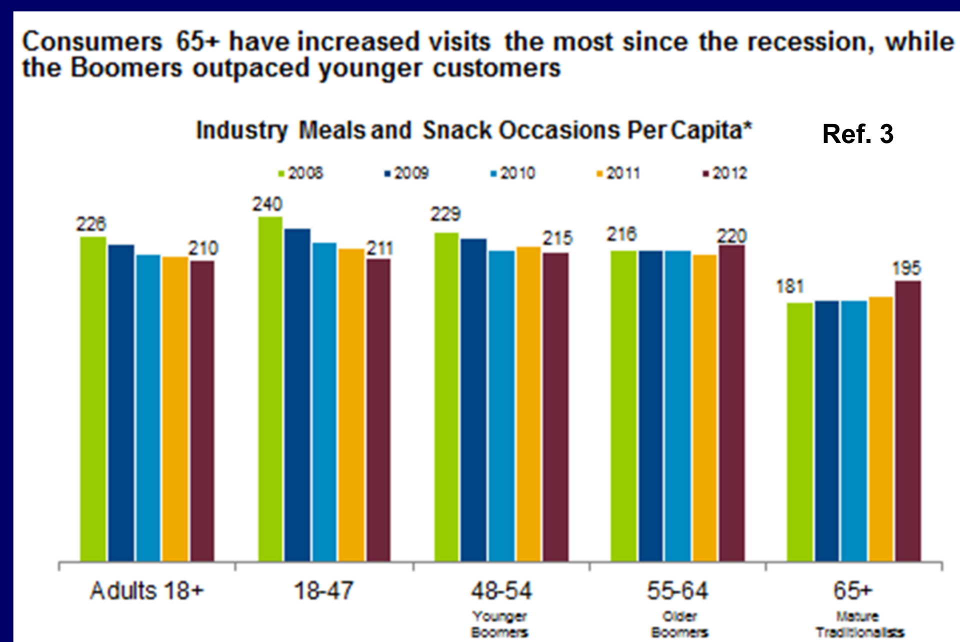
1. Hartman Group, Modern Eating Report,/Compass Database, 2013/14; 2. IRI, State-of-the-Snack Food Industry, 2015; 3. SFA, Specialty Food Consumers, 2014; 4. Technomic, Snacking Occasion Consumer Trend Report, 2014.

By 2019: 1/2 Adults Age 50+, Driving Restaurants, Contemporize Healthy Foods



Boomer/65+ CPG Spending vs. Industry[2]





1. U.S. Census, 2014; 2. IRI Aging America: Carving Out Growth Mature Markets , 5/2014; 3. NPD Group, CREST, 2014

Explosive New Bar, Sports, Energy Bev Ops, Older Women

61% Nutrition Bars Users Look for Foods with Nutrients that Target Specific Health Conditions[1]

Proj. Annual Growth Fx Food Categories 2014-16

	Average	Seniors
Health Value Bars	10% to 12%	17% to 19%
Refrigerated Tea	6% to 8%	3% to 5%
Sports Drinks	3% to 5%	3% to 5%
Energy Drinks	9% to 11%	7% to 9%

Index Use Any Nutrition Bar: Age

Age Group	
18-24	117
25-34	119
35-44	122
45-54	100
55-64	87
65+	63
Gender	
Male	87
Female	112

Now

Heavy User: 5+ More Nutrition Bars Month[1]

Age	% of All Adults	% of Those Using Five or More Nutritional Bars in Last 30 Days		
		All	Men	Women
18-34	29.4%	35.5%	18.2%	17.2%
35-44	16.9	22.3	9.5	12.8
45-54	18.3	19.0	7.6	11.4
55+	35.5	23.2	6.8	16.4
Total	**100.0%**	**100.0%**	**42.2%**	**57.8%**

Pkg. Facts, Nutrition/Cereal Bars, 2015; IRI Aging in America, 2015

2 Re-Thinking Natural Clean & Chemical-Free

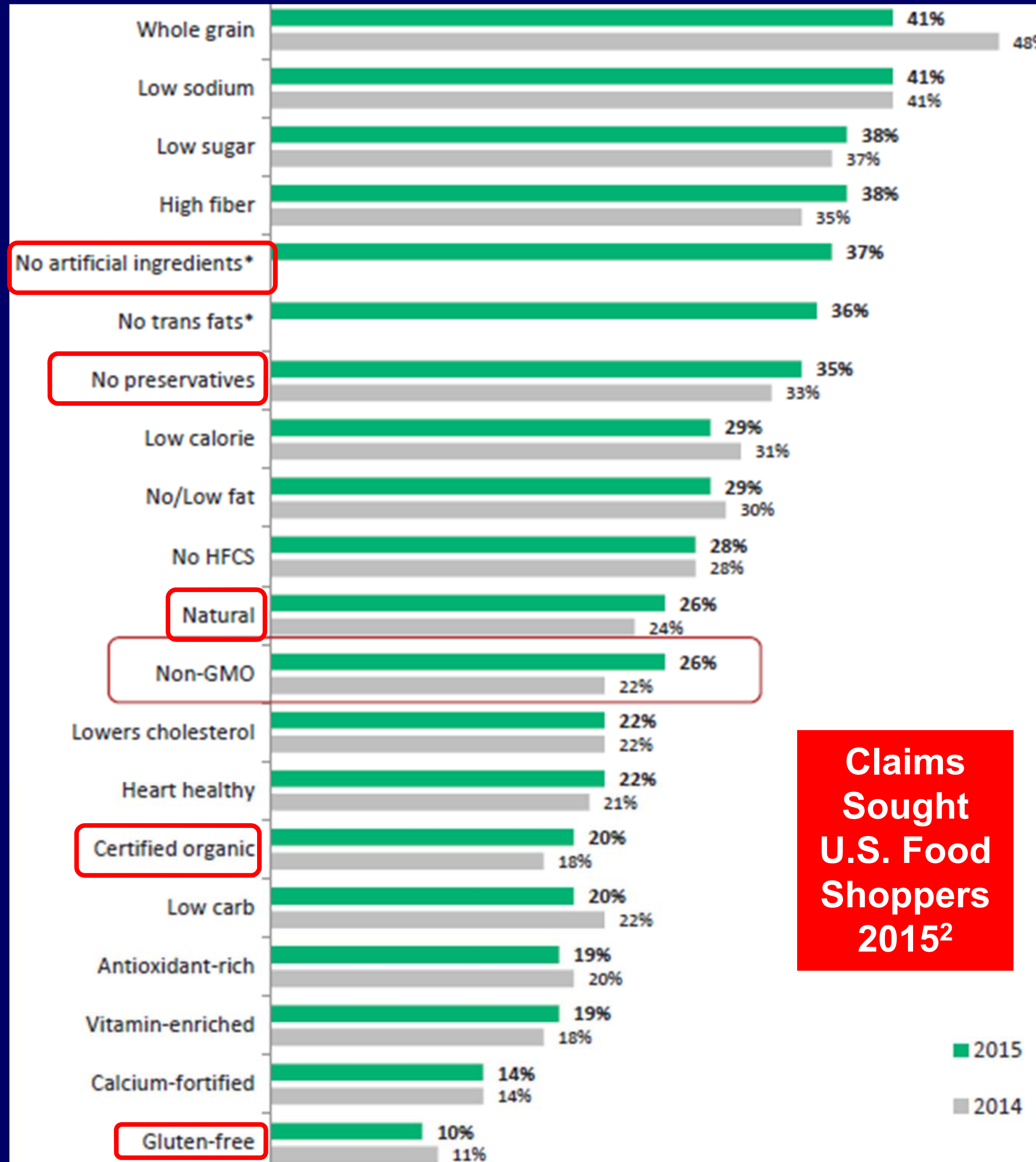
New Natural Hierarchy Humans 2015

% Consumers Buy More 2014[1]

28% organic products

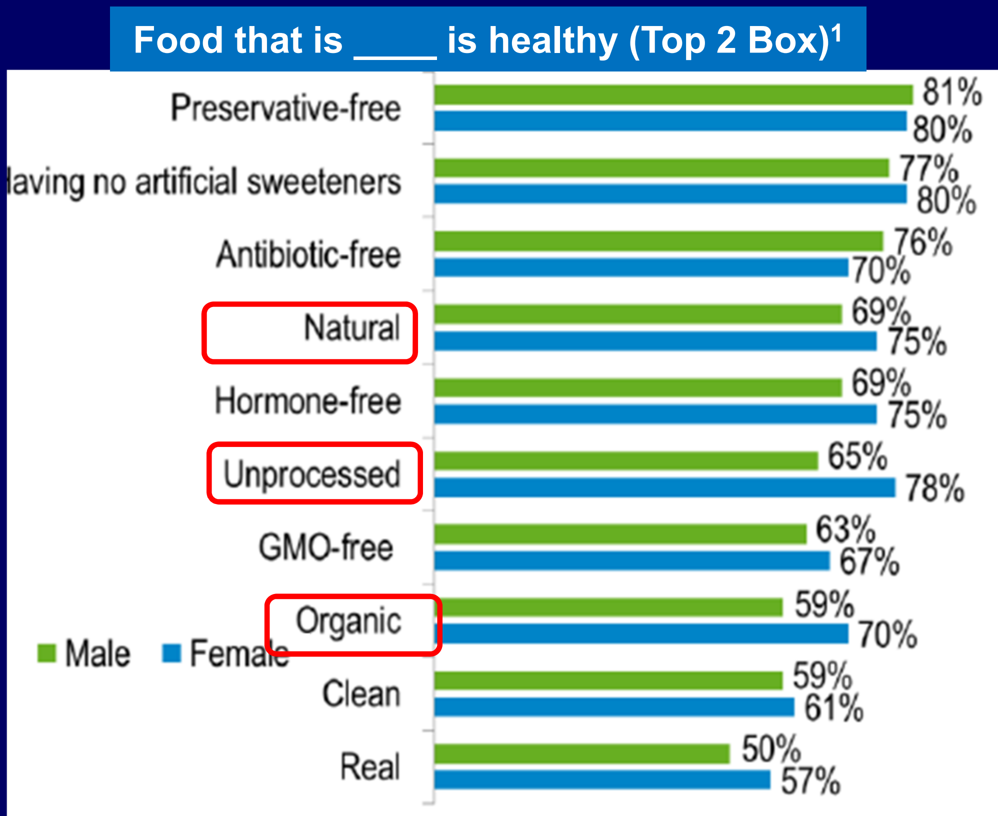
25% natural products

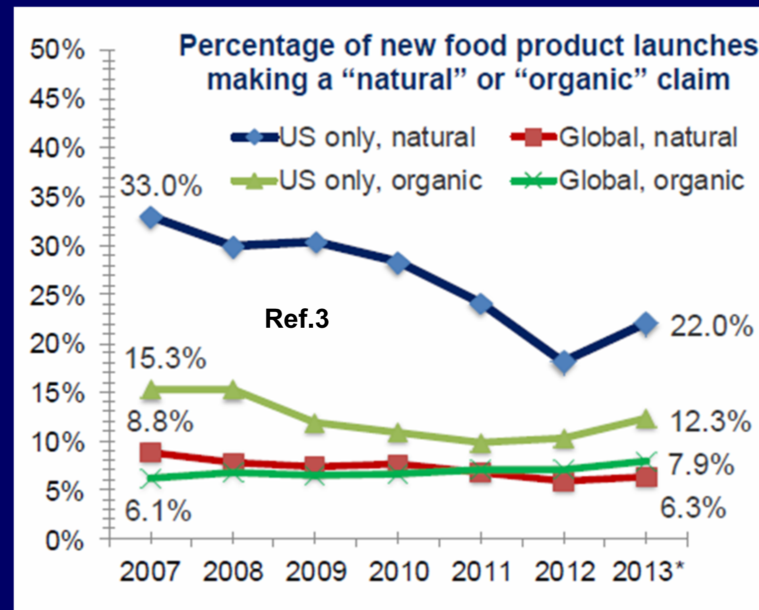
23% non-GMO products



1. Hartman , Organic Report, 2015; 2. FMI, U.S. Grocery Shopper Trends, 2015;

Interest in Natural Outpaces Organic; Aligns Better No Additives, but Industry Abandoning





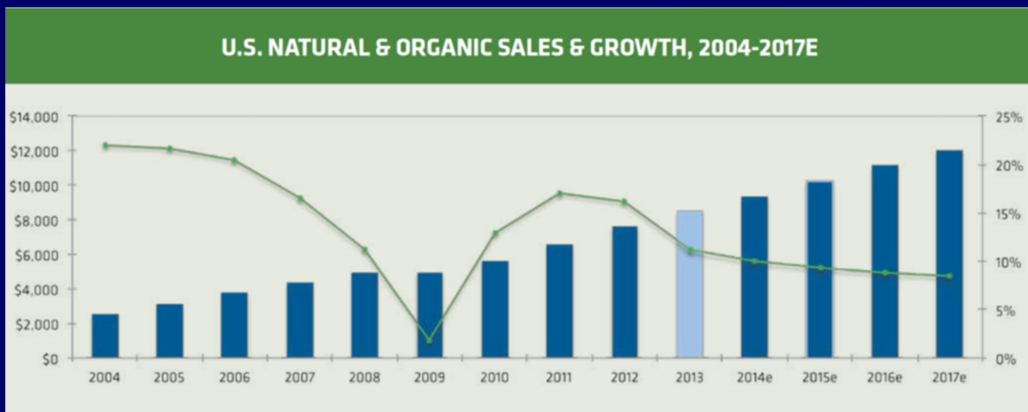
Natural $27B, +11.1%, But Citizen Class Action Lawsuits Discourage Marketers[4]

Natural: What Happens to Food/Bev After It is Grown/Made (*e.g*., processing steps, additives)[2]

Organic: What Happens to Food at Origin (*e.g*. the Farm, the Plant, the Animal)[2]

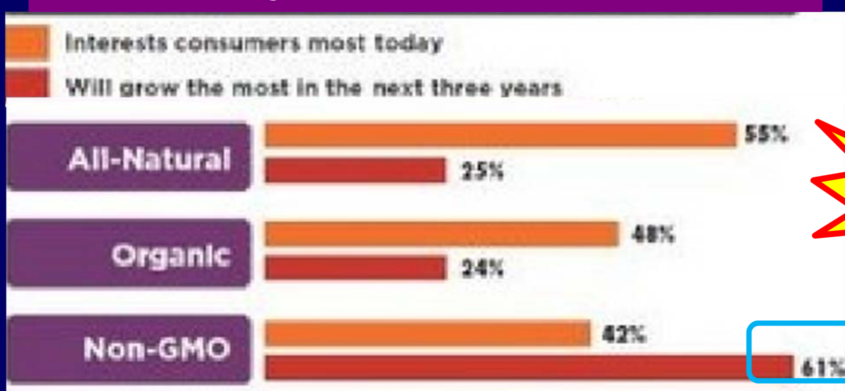
1. ; Technomic, Healthy Consumer Trend Report, 2014; 2. Hartman Group's Organic/Natural 2014; 3. Nutr. Business J., 2015; 4. Datamonitor 2014

Organic Food $35B, +11%, Most Double Digit[1]

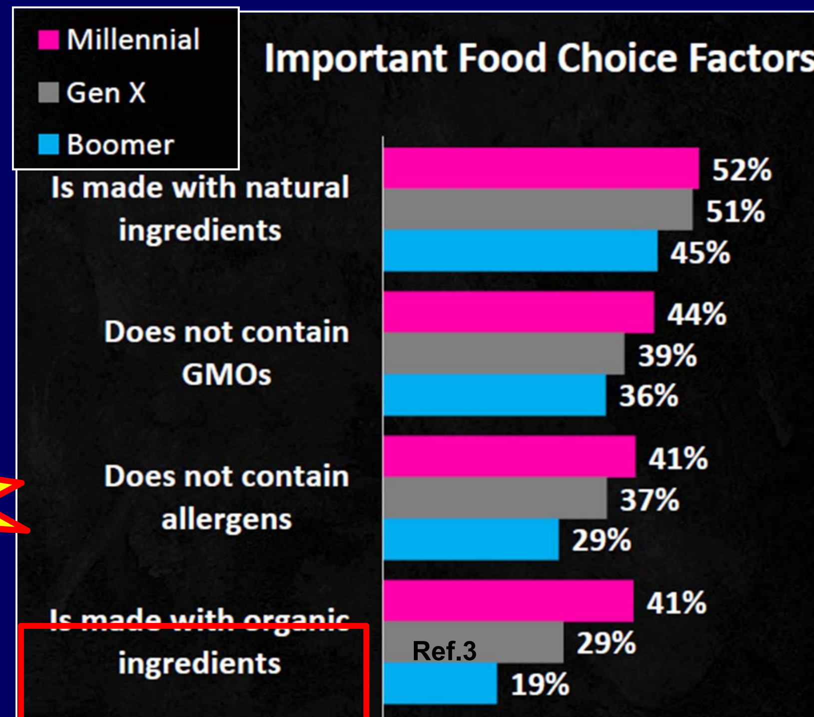


73% Buy Sometimes, 9%, Daily
86% Millennials, 72% Gen X,
63% Boomers[3]

Claims Proj. in3 Years Non-GMO > ?[4]



Walmart

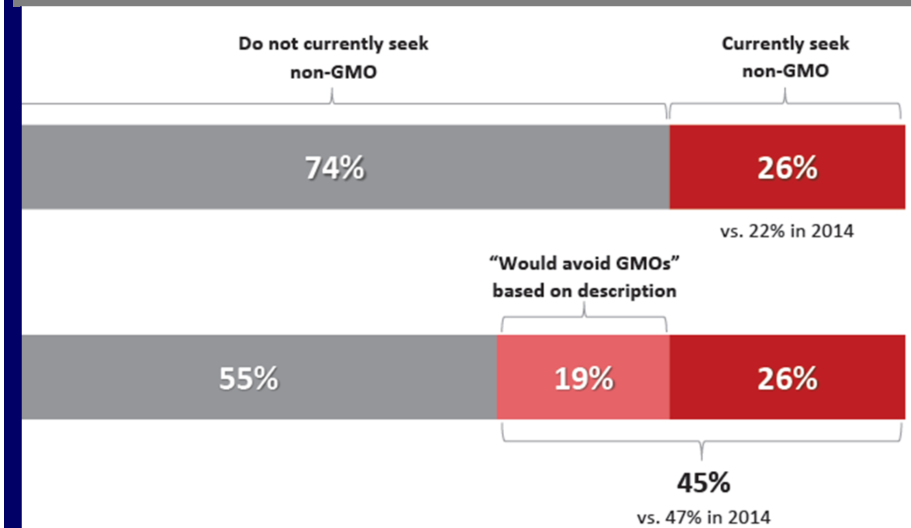


29% Adults Buy Organic to Avoid GMOs[3]
1/3 of Organic Users Look for Non-GMO

1. OTA; 2015; 2. Nutrition Busn. J. 2015; 3. Hartman Group Organic & Natural, 2014; SFA, State-of-the-Specialty Food Industry, 2015

GMOs & Primary Food Shoppers Avoiders 26% 2015 vs 22% in 2014[1]

% Food Shoppers Avoiding GMOs'15[1]



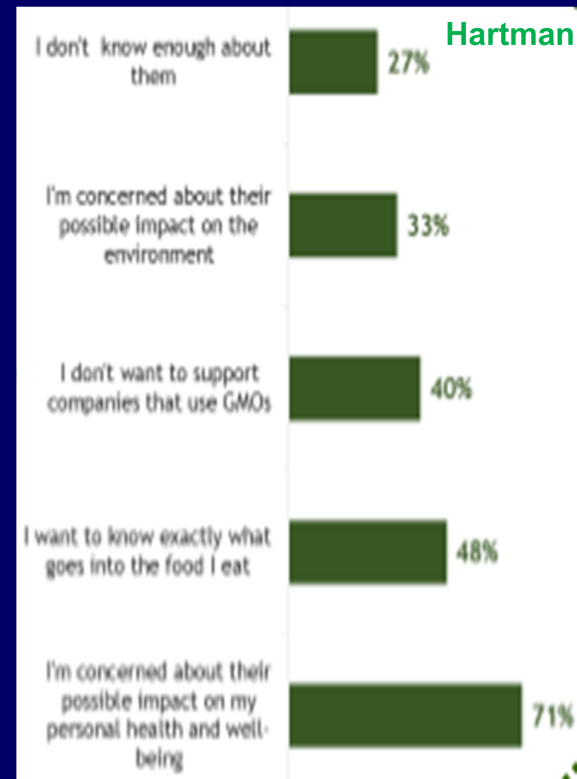
Hartman:[2]

40%

Four out of ten consumers today are avoiding or reducing GMOs in their daily diet.

Organic users (47%) are more likely than non-organic users (20%) to avoid/reduce GMOs in their daily diet.

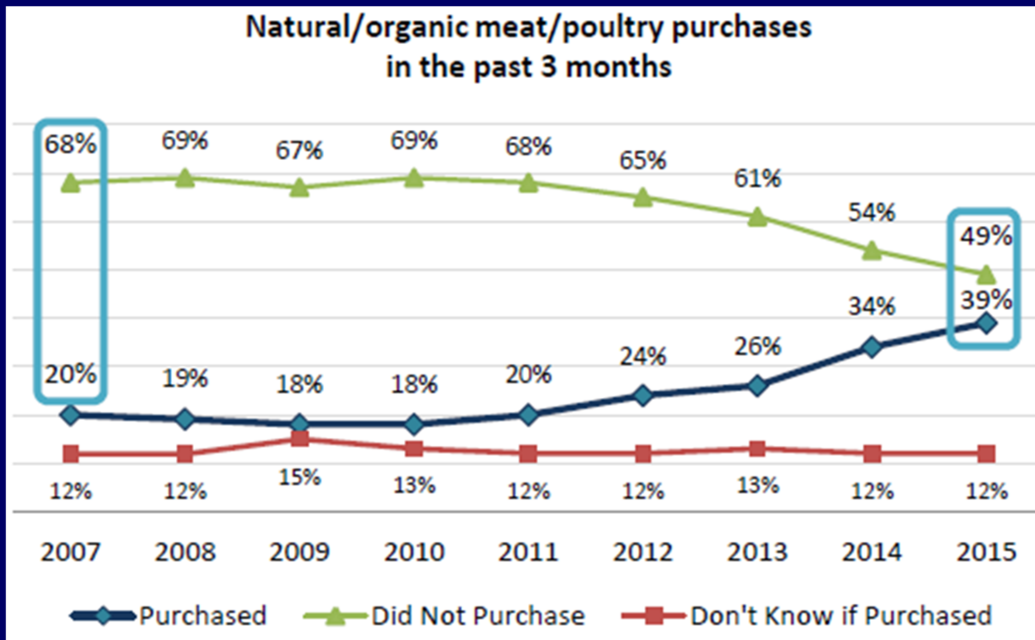
Why They Avoid GMOs[2]



Moms with Kids < Age 11, Urban, HH > $49K, Age 37 #1 Target GMO[3]

1. FMI, US Grocery Shopper Trends, 2015; 2. Hartman, Organic & Natural, 2014; 3. Pkg. Facts, Clean Label Report, 2015

New Natural Hot Spots



#1 Organic/Natural Meat[2]

#1 Reason Use Organic Natural Meat – Free from Substances Want to Avoid, Antibiotics/Hormones

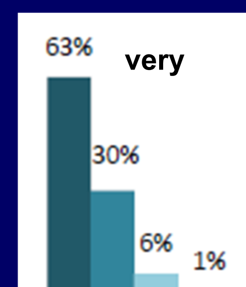
Hot Ingredients[3]

1. Farm/estate branded items
2. Ancient grains (e.g. kamut, spelt, amaranth)
3. Non-wheat flour (e.g. peanut, millet, barley, rice)
4. Natural sweeteners (e.g. agave, honey, concentrated fruit juice, maple syrup)

#2 Real Natural Sweeteners

#3 Food "Made in US" Extremely Imp. 91%[2,4]

Interest

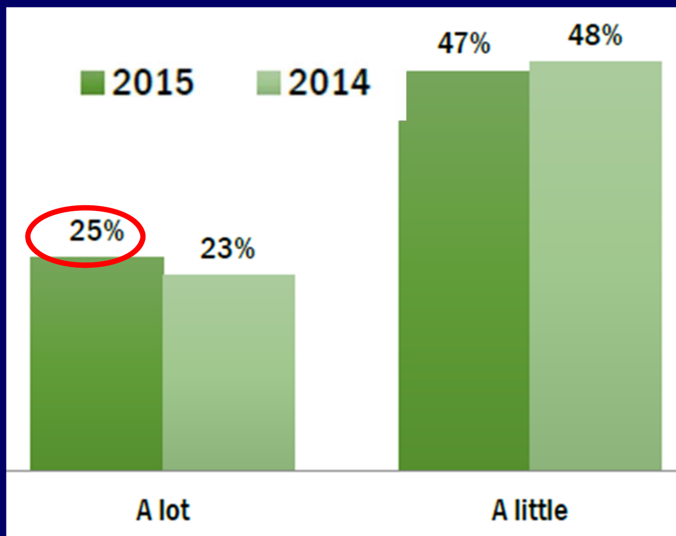


Meat/poultry raised/produced in the USA

1. FMI,, Power of Meat, 2015; 2. NRA, What's Hot? Chef's Survey, 10/2014;3. Food Mktg. Institute, U.S. Grocery Shopper Trends, 2015.

72%Thought How Food Farmed/Produced; ¼ A Lot Humane, Ag Chemicals, New Reliance on Farmer

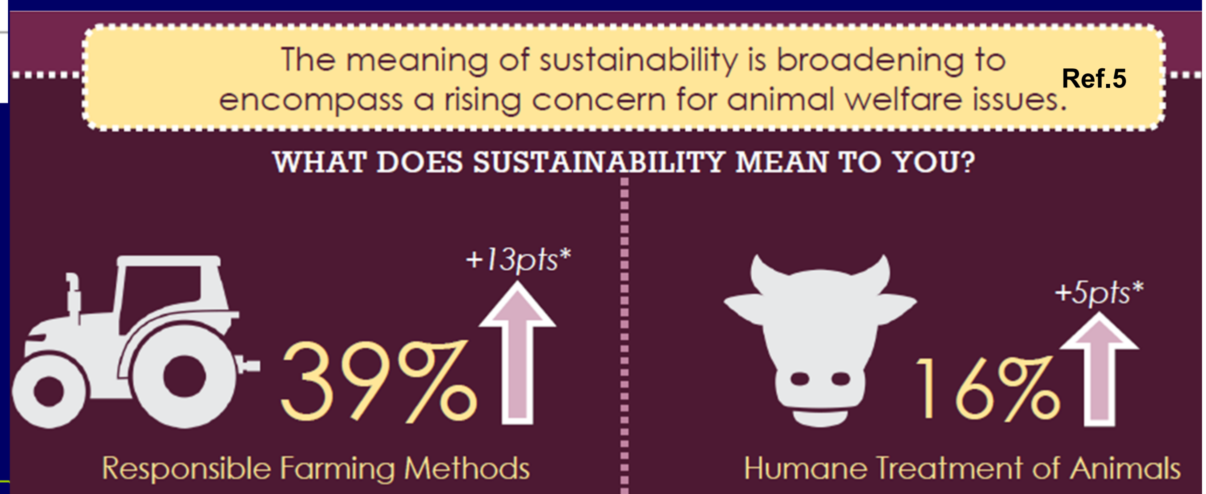
How much thought have you given to how your foods/bev were farmed/produced?[1]



63% Think Farm-Raised Healthier, 45% Much Tastier, 29% Will Pay More[2]

Which Help You Stay Healthy[3]

Farmers: Most Believable Spokesperson > Academics[4]



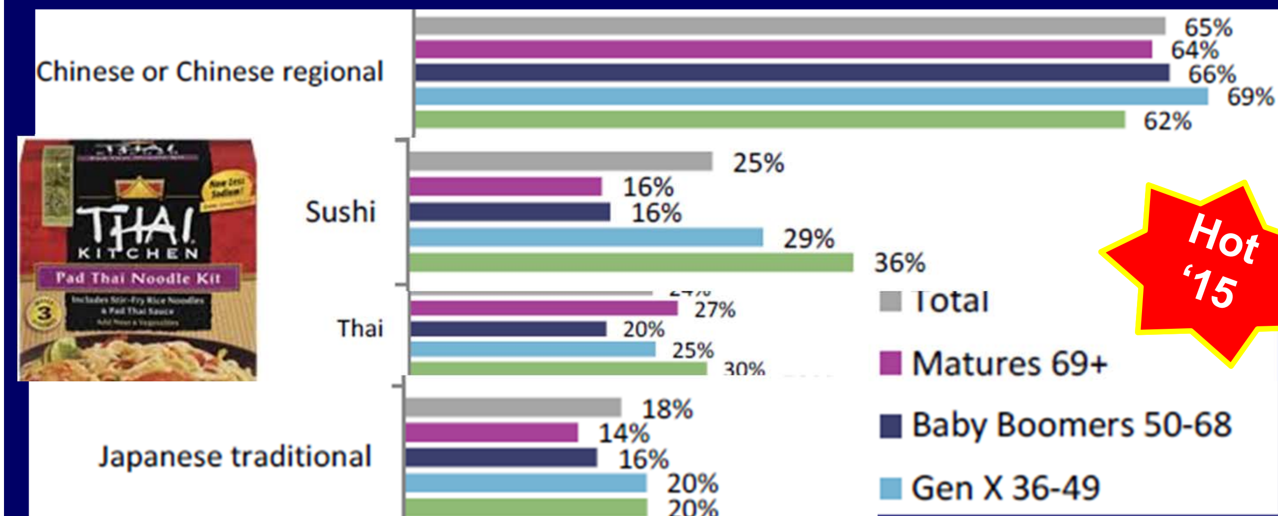
1. IFIC, Food & Nutrition Survey, 2015; 2. Technomic, Healthy Consumer Trend Rpt., 2014, 3. FMI, U.S. Grocery Shopper Trends, 2015; 4. Pew Res., 2014; 5. Hartman Sustainability, 2015;

3 Culinary Cues



Ethnic In-Home Prep +28% 5 Yr 35% Stir-fry, 1/3 More Interested Global Flavors[1]

Deeper Dive Asian: Cuisines Eaten 2014: Shoppers[2]



Hot '15

Hot Ethnic Cuisines 2015[2]

1. Ethnic fusion cuisine
2. Authentic ethnic cuisine
3. Regional ethnic cuisine
4. Peruvian cuisine
5. Southeast Asian cuisine (e.g. Thai, Vietnamese, Malaysian)
6. Korean cuisine
7. Native American cuisine
8. Regional American cuisine

Hot Flavors '15[3]

1. Harissa
2. Aji
3. Gochujang
4. Yuzu
5. Togarashi
6. Peri Peri
7. Nut butters

Hot Prep '15[4]

1. Pickling
2. Fermenting
3. Fire-roasting
4. Smoking
5. Sous Vide
6. Cast-iron

Top Pasta Use[5]

1. Italy
2. Venezuela
3. Tunisia
4. Greece
5. Switzerland
6. Sweden
7. US

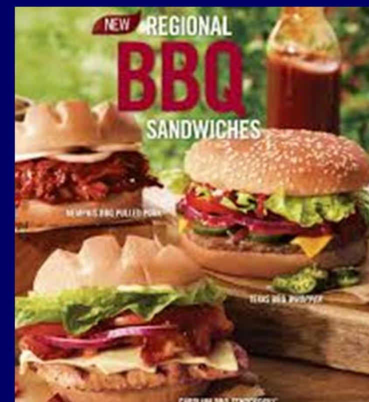
Pierogi

1. FMI, Power of Meat, 2015; 2FMI, U.S. Grocery Shopper Trends, 2014; 3. Datassential, 2015; 4. National Restaurant Assn., What's Hot, 2014; 5. International Pasta Assn., 2012.

Beverage & Main Dish Mega Trends

Hot Sandwich Mega Trends 2015[1]

63%	BBQ Sandwiches
51%	Upscale Breads: brioche, pretzel, ciabatta
41%	thnic Sandwiches: banh mi, tortas, cemitas, Cuban
37%	New Healthy: gluten free, vegan, organic
32%	Unique Carriers: naan, bao, waffles
31%	Pickled Ingredients: giardiniera, onions, radishes



Projected Top Selling Bev Flavors 2015[3]

Coconut
Mango
Cinnamon
Ginger
Blackberry
Tangerine
Apricot
Acai

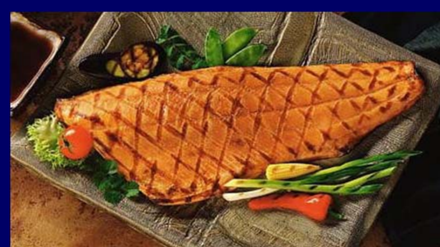
Underutilized Fish, Mackerel[2]

Fastest Growing[3] Flavors Restaurants

Grapefruit
Aranciata
Lime
Black Cherry
Lemon
Limonata
Grape
Cream Soda
Strawberry
Ginger

Most Eaten Fish[3]

Shrimp
Salmon
Tuna
Tilapia
Pollack
Pangasius
Cod
Catfish
Crab
Clams



New Cuts Meat: Culotte Steak, New York Pork Chops[5]

Fastest Growing Cheese Restaurants[4]

Taleggio, Burrata, Pecorino Romano, Hispanic Cotija, Queso Fresco[4]

1. Datassential, QSR Magazine, 1/2015; 2. What's Hot? Chef's Survey, 1/2014; 3. Beverage Industry Magazine, 1/2015 New Product Development Survey National Fisheries Institute, 2014; 4. IDDBA, What's in Store? 2015; 5. NRA, What's Hot? Chef's Survey, 10/2014.

Top Growing Breads Restaurants 2014

Breakfast Bread

Flatbread
Brioche
Ciabatta
Grain Bread
Multi Grain
Focaccia
Rye
Baguette
Panini
Whole Grain

Sandwich Carrier

Brioche
Artisan
Pretzel
Flatbread
Ciabatta
Whole Grain
Wheat Bun
Multi Grain
Panini
Cuban

Appetizer Bread

Garlic Bread
Bread Sticks
Cheese Bread
Bread Basket

Order More >
Salsa
Seafood Dip
Spinach/Art. Dip
Cheese Dip

Burger Carrier

Pretzel
Brioche
English Muffin
Texas Toast
Wrap
Tortilla
Multi Grain
Wheat Bun
Whole Wheat
Onion Roll




Datassential, QSR Magazine, One Source Special Issue, 2014

Veggies, Flours, Grains

Hot Ingredients '15[2]

1. Farm/estate branded items
2. Artisan cheeses
3. Non-wheat flour (e.g. peanut, millet, barley, rice)
4. House-made/artisan pickles
- Artisan/specialty bacon
- Vinegar/flavored vinegar/house-made vinegars
7. Ethnic flour (e.g. fufu, teff, cassava/yuca)

Hot '15

Hot Produce[2]

2. Heirloom apples
3. Unusual/uncommon herbs (e.g. chervil, lovage, lemon balm, papalo)

Carrot, Celery Top 10 Fastest Growth Juices Restaurants[1]

Ref.2

Cooling Trends

Down from Top 20 Food Trends in 2009

Exotic fruit	(now #64)
Superfruits	(now #63)

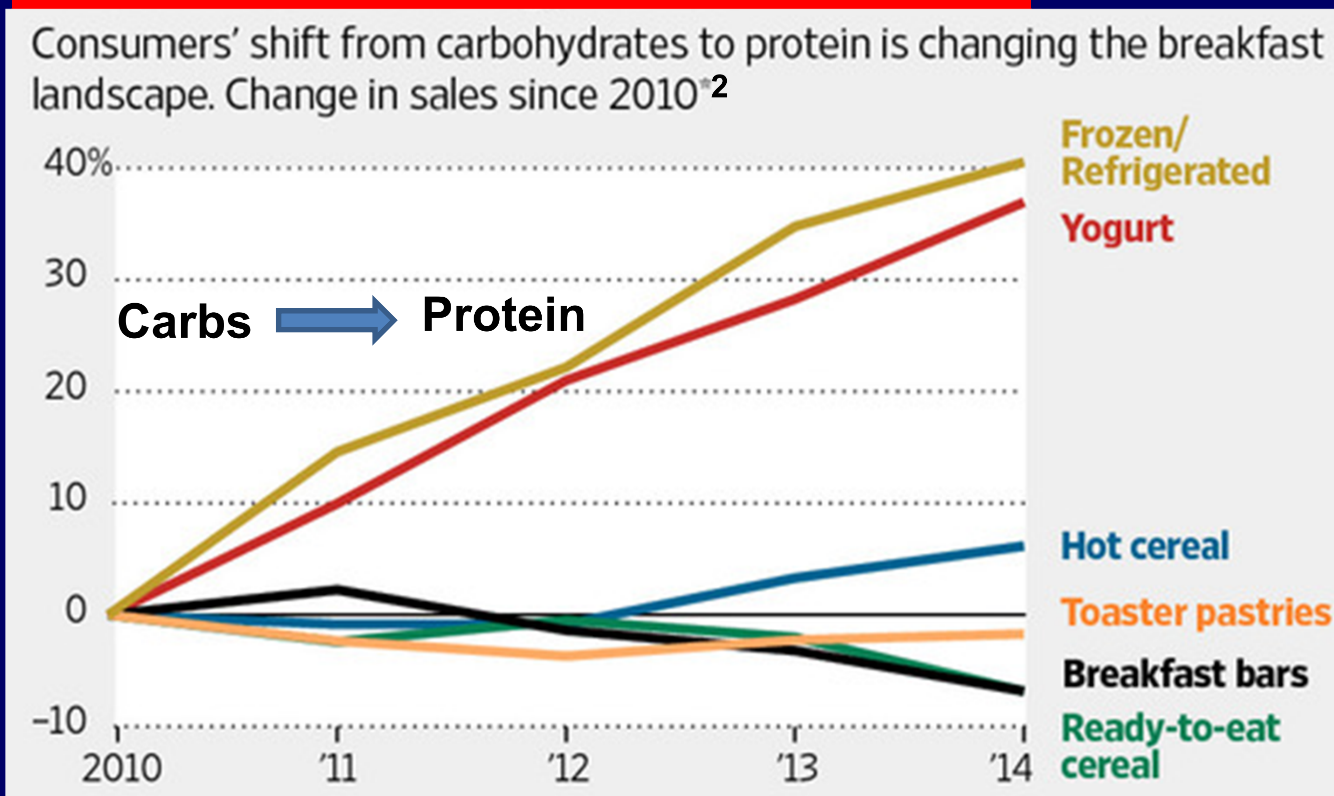
1. Datassential , QSR, 1/2014; 2. NRA, What's Hot? Chef's Survey, 10/2014

Hot '15

Breakfast Going More Gourmet; Big Breakfast Op: Ethnic Foods

#1 Hot Culinary Breakfast Trend 2015 Ethnic; e.g., Asian Syrups, Chorizo[1]

Seafood, Veggies Move into the AM Breakfast, Crab Sausages, Cakes[3]



Breakfast Pizza

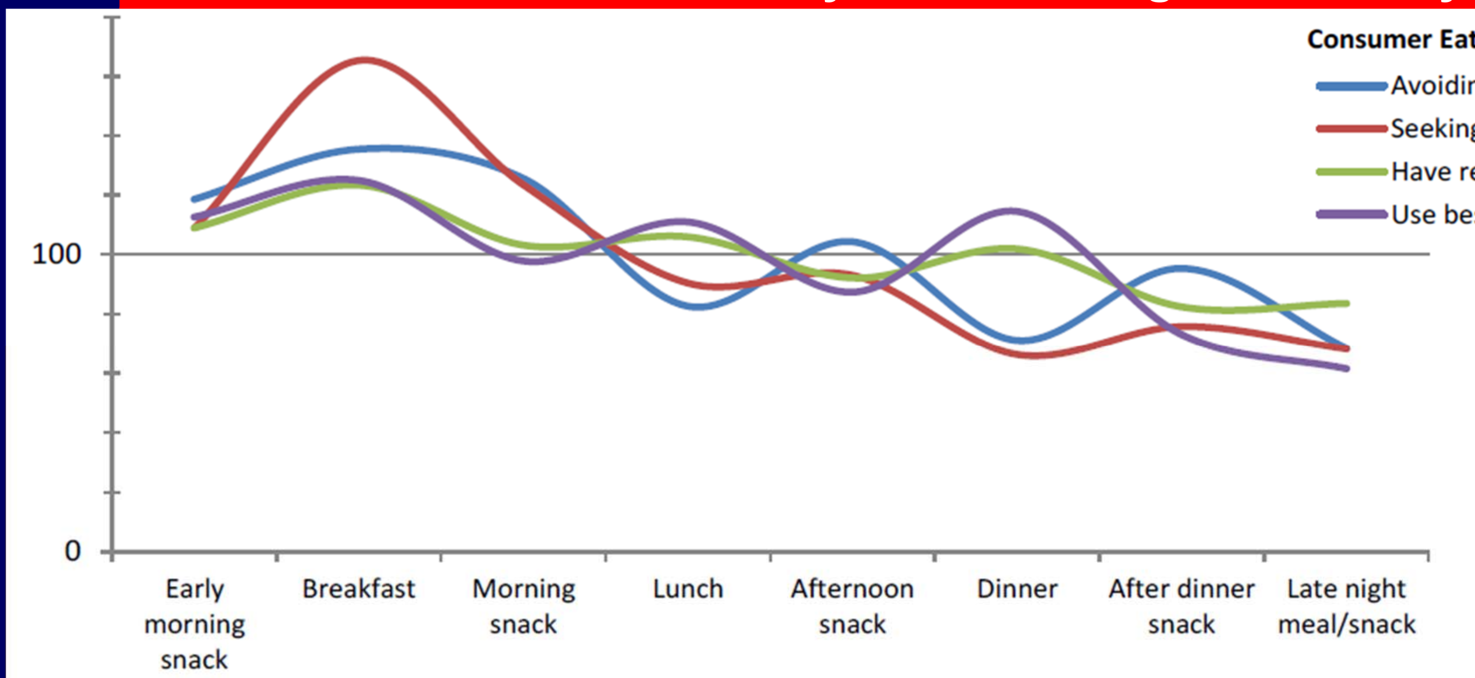
Non Breakfast Sandwiches, Cubano Panini, Parfait[3]

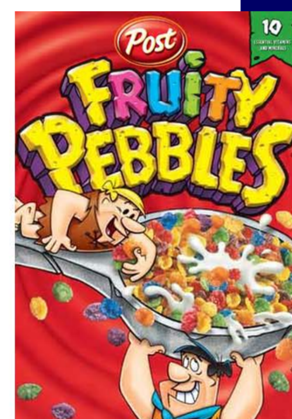
Motivators Eat A.M. - Energy, Mental, Weight, Feel Full[4]

1. NRA, What's Hot Survey, 2014; 2. Bernstein Analysis Wall St, J. Y/E July, 2014; 3. Datassential, QSR,2014; 4. IFIC, Breakfast Survey, 2010.

Nutrients Tops Wellness Goal in AM; Simply Healthy Not Enough, Tout Nutrition Add-ins[1]

Wellness Relevant Dietary Goals Throughout the Day

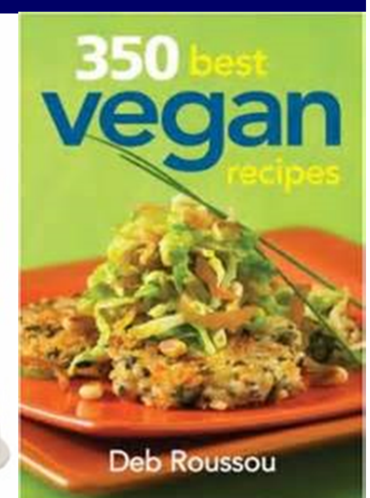




RTD Breakfast Sales Small, but +56%[2]

1. FMI, U.S. Grocery Shopper Trends, 2014;
2. 2. IRI, Y/E 7, 14.2014.

4 The New Healthy



55% Households Watching What They Eat

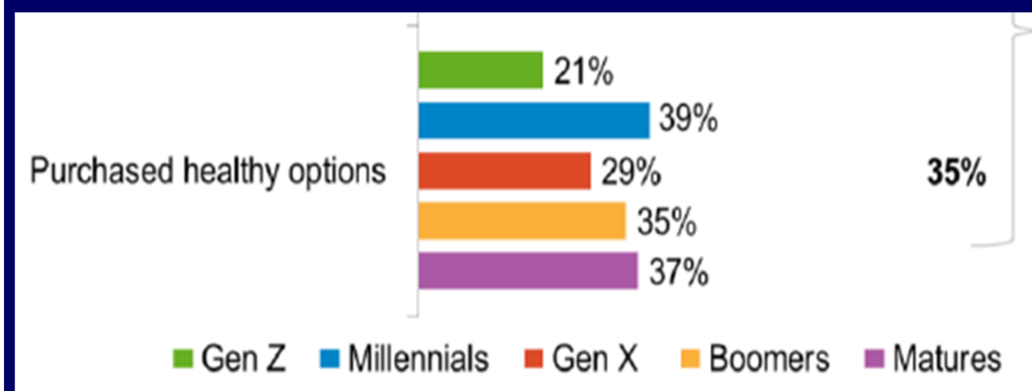
Reasons Consumers Watching the Diets 2014[1]

General health	66%
Lose weight	55
Watch intake of ingredients such as fat, cholesterol, sugar, carbs, salt, etc.	40
To help avoid future medical conditions	38
Maintain weight	38
In response to current medical condition such as diabetes, heart disease, or hypertension	22
Food allergy or intolerance	10

Very Concerned Nutrient Content of their Diet[2]

Generations	2014	2011
Millennials 18-35	37%	23%
Generation X 36-49	32%	36%
Boomers 50-68	35%	40%
Matures 69+	40%	46%

Bought Healthy at Foodservice Past Week

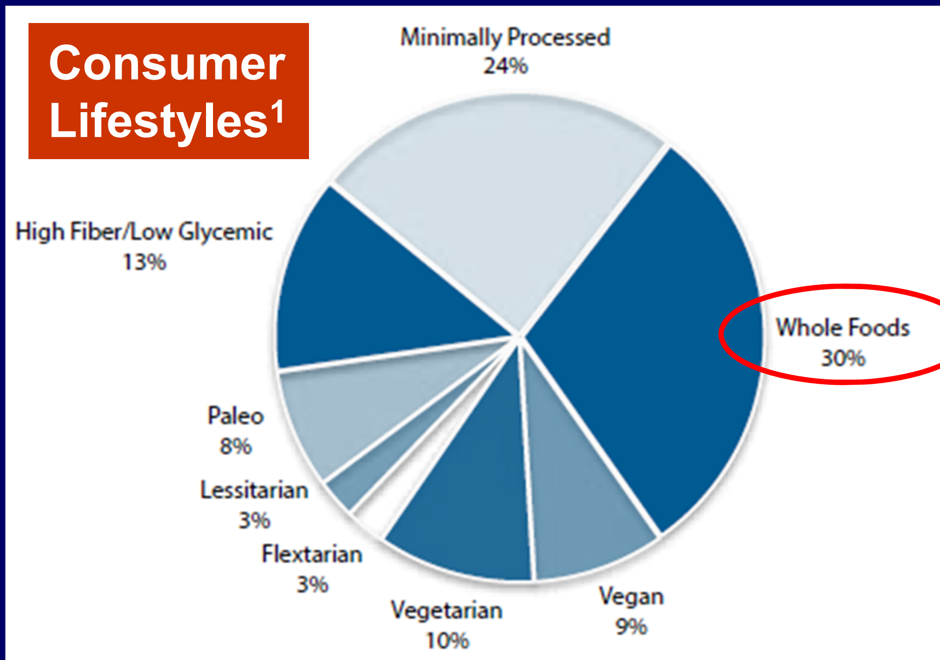


% Look for "Low In" Claims Falls 2011-14[2]

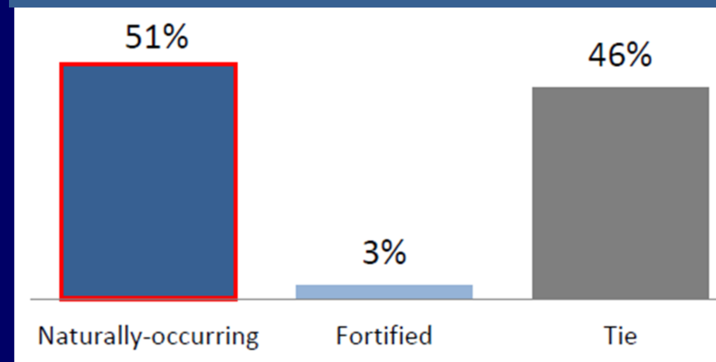
- Low sodium -18%
- Low sugar -8%
- No trans fat -18%
- Low calorie -9%
- Low fat -21%
- Low cholesterol -29%
- Low carb -19%

1. Pkg. Facts, Weight Management, 2014; 2. FMI, U.S. Grocery Shopper Trends, 2014, 2015; 3. Technomic Healthy Eating Report, 2014

Whole Foods - Part of the New Lifestyle - Prefer Get Nutrients/Benefits from Food



Preference Fortified Food vs. Naturally-Sourced Nutrition[2]



"Prefer to Get from Foods Naturally" Contain This[4]

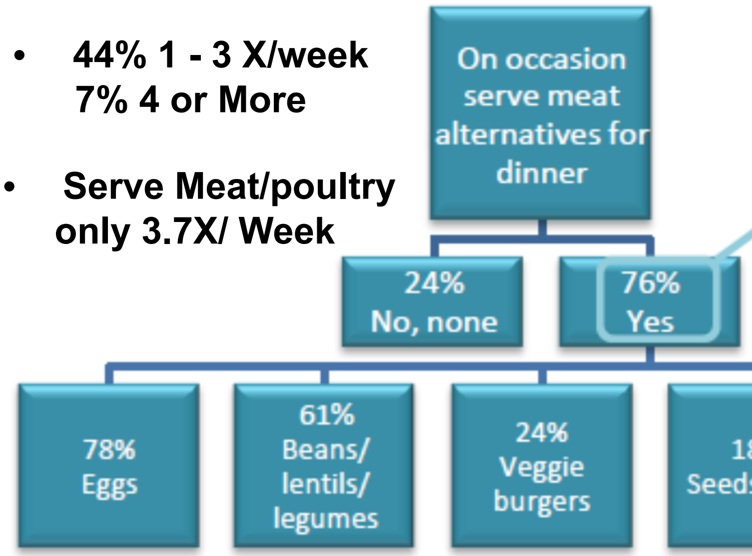
- Fiber 73%
- Protein 72%
- Healthy Oils 62%
- Antioxidants 62%
- Vitamin E 47%
- Omega-3s 44%

1. Nutrition Business J., 2015: 2. IFIC, Functional Food Survey, 2013; 3. Euromonitor, 2014; 4. Hartman Group, Reimagining Health /Nutrition, 2014

Plant-Based Eating: 24% Regularly Eat More Plant-Based Meals, 47% Occasionally[1]

76% Households Serve Meat Alternatives Occasionally Dinner
(Protein Sources Other than Meat, Poultry, Seafood)[1]

- 44% 1 - 3 X/week
  7% 4 or More
- Serve Meat/poultry only 3.7X/ Week

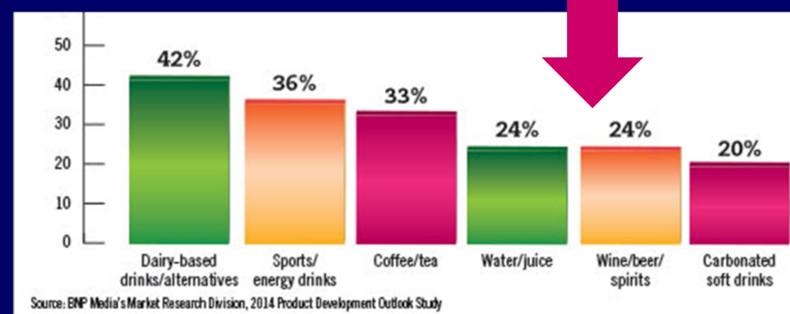


Beans, lentils, legumes +11% 2014 → 2015
Quinoa & other whole grains +10%

Alternative Beverages 2nd Most Active New Beverage Category 2015[4]

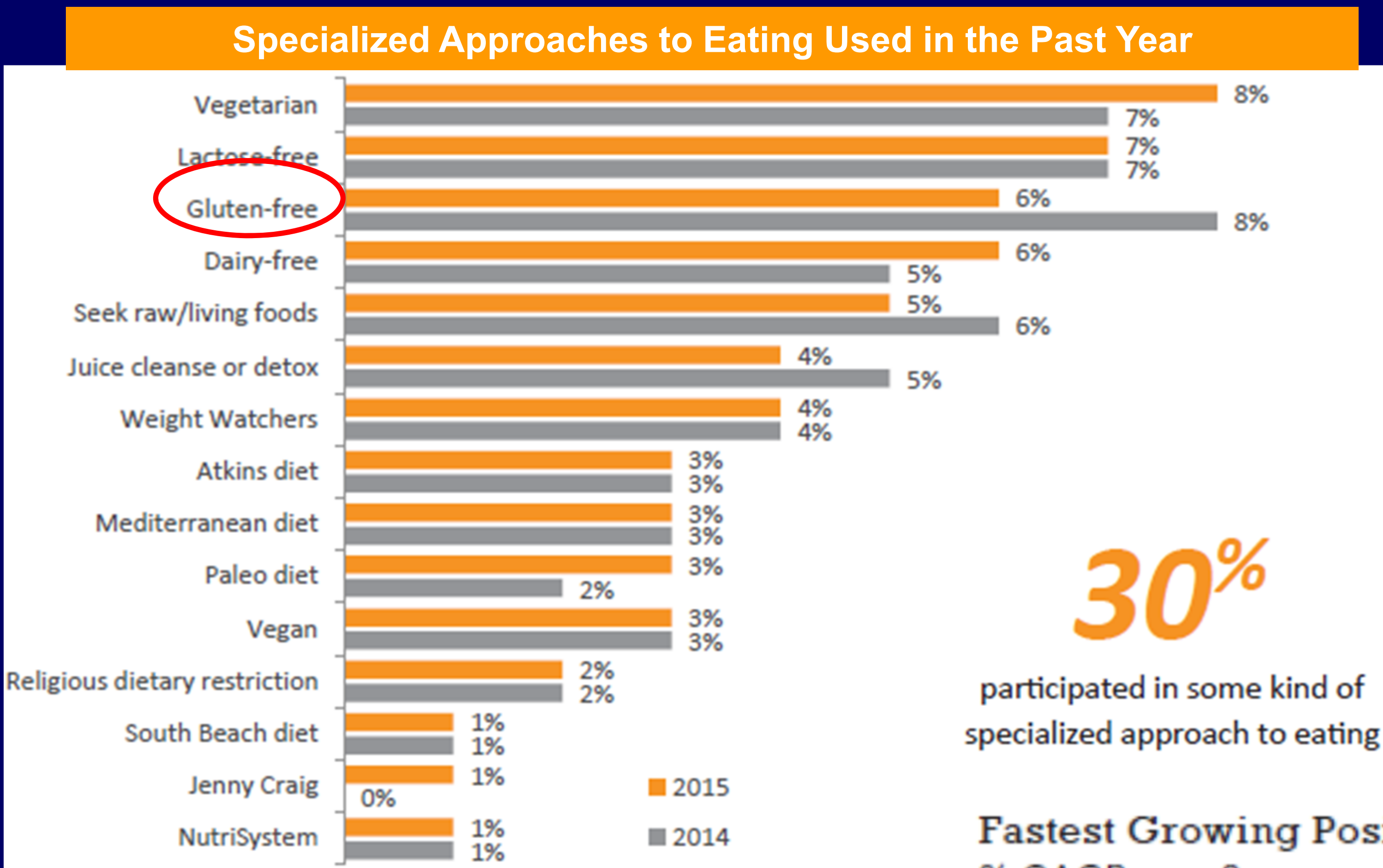
Meatless/Vegetarian #8 Hot Culinary Trend C-O-P 2015, Vegetarian #1 for Appetizers
Vegan 11th Center-of-the-Plate[2]

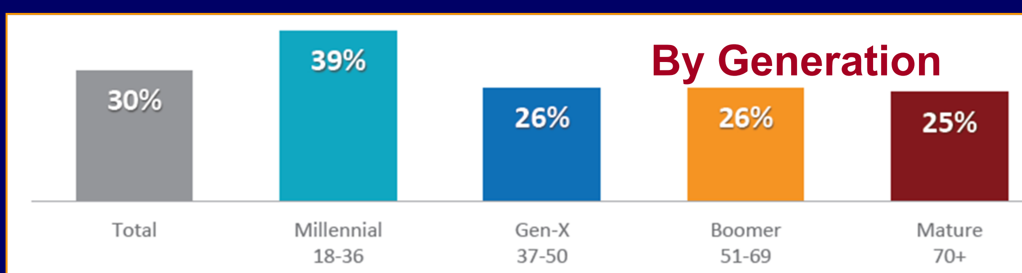
17% Some Effort Eat Partially Vegetarian Diet
2% Vegan, Avoid All Animal Products[3]

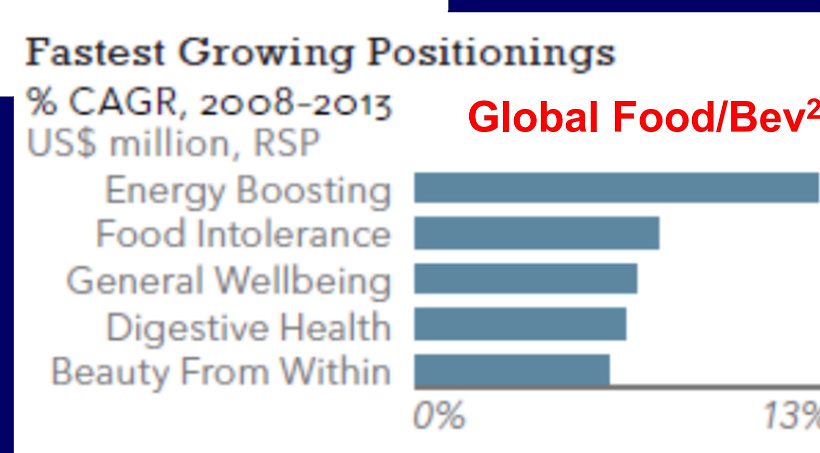


1. FMI, Power of Meat, 2015; 2. What's Hot? Chef's Survey, 10/2014; 3. 2014 Gallup Study of Nutrient Knowledge &
2. Consumption; 4. Beverage Industry Magazine, 1/2015 New Product Development Survey; Food Navigator, 2015

Experiment Alternative Eating Styles[1]

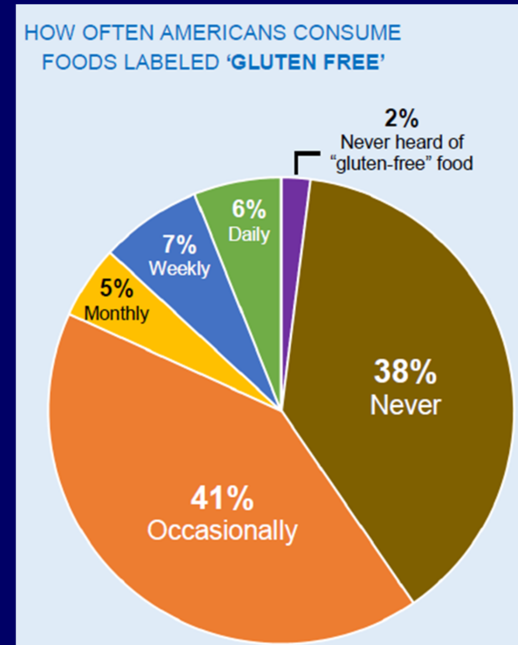






1. FMI, U.S. Grocery Shopper Trends, 2015; 2. Euromonitor, 2014

Overinflated: How Can We Measure Elimination Markets?

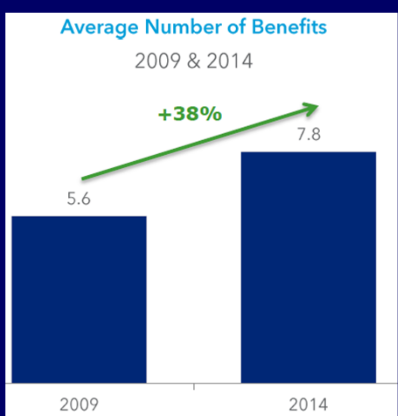


The current system doesn't work!

Scanning for the presence of a claim is not an indication of intent to purchase. Are we going to continue to be mislead that these are explosive growth - consumer driven markets or niches?

Market Size: Nielsen $24B 2014 · Mintel $15.6B by 2016 · Con Agra · NBJ $10B · $1.2B 2014 · Euromonitor Global $2.1B 2013 · Pkg. Facts, $943M

Claims Per Pack

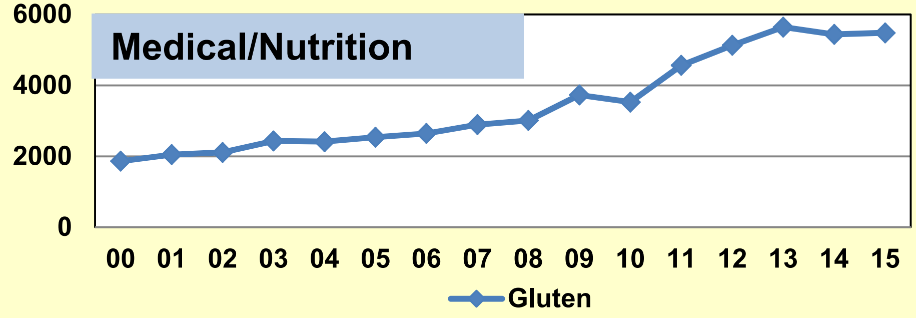


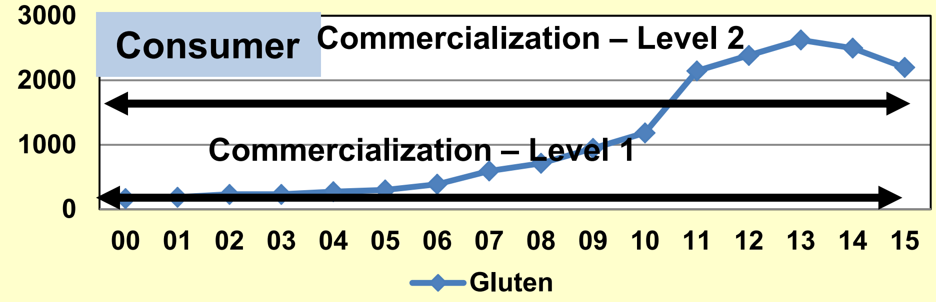
- ✓ 44% believe GF healthier in 2014 vs 60% in 2012[1]
- ✓ 10% food shoppers sought GF on label, 11% 2014[2]
- ✓ 52% who bought GF didn't know it was GF[3]
- ✓ 30% bought GF in 2014 for "no reason"

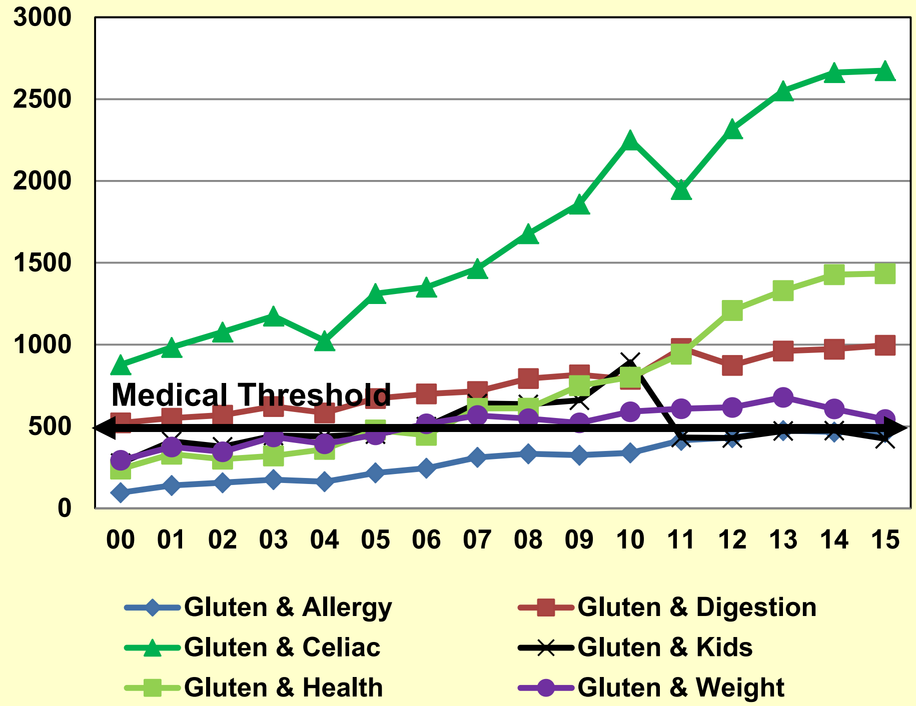
#1 Reason to Buy = No Reason

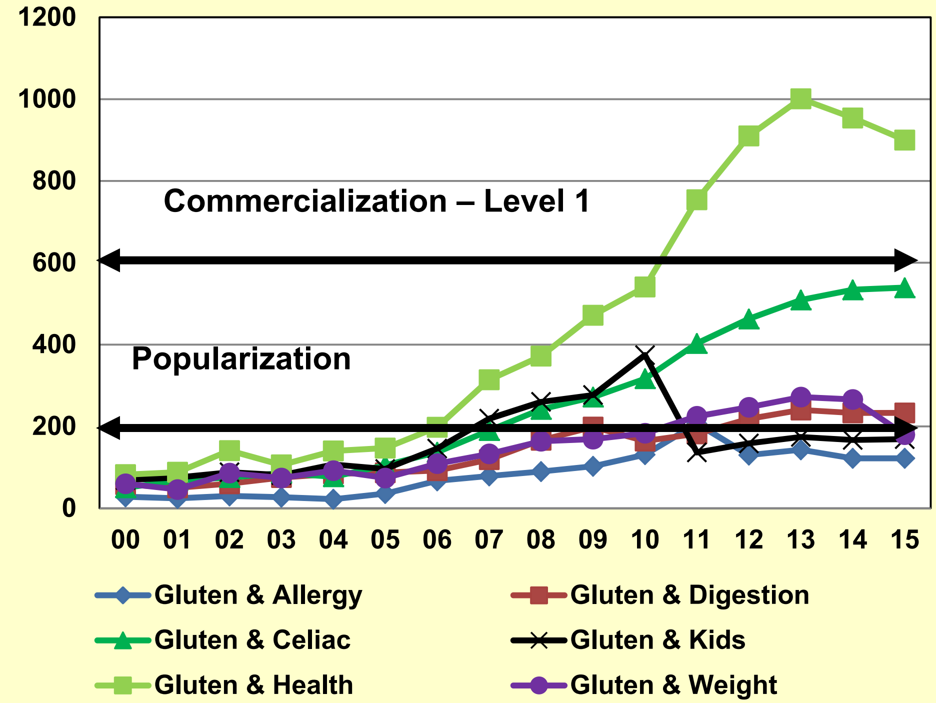
Technomic, Healthy Eating Consumer Trend Report, 2014; FMI, US Grocery Shopper Trends, 2014; Hartman Group, Culture of Wellness, 2013; Sloan Trends, Inc. .

TrendSense™ Predictive Model: Gluten-Free Peaked in Early 2013, Celiac Remains Strong









Protein Gen II: Amount, Type, Frequency Move to Plant, 50% Try Get More 2015[1]

Consumer Links Protein 2014[1]

- 87% builds muscle
- 76% aid exercise recovery
- 72% helps feel full
- 66% aids weight loss
- 64% energy throughout the day
- 62% maintain energy
- 38% soy protein aids weight loss
- 33% boosts metabolism

Reason Use Protein Bev[4]	3All
Gives me energy	50
Physical Performance	49
Curb hunger / feel full	48
Exercise recovery	46
Weight Loss Aid	39

Top U.S. Health Concerns Very Extremely Concerned [3]

Bone health/strength	63%
Cancer	62%
Cardiovascular/heart disease	61%
Eye health	60%
Tiredness, lack of energy	56%
Stress	54%
Retaining mental sharpness as I age	53%
Muscle health/muscle tone	53%

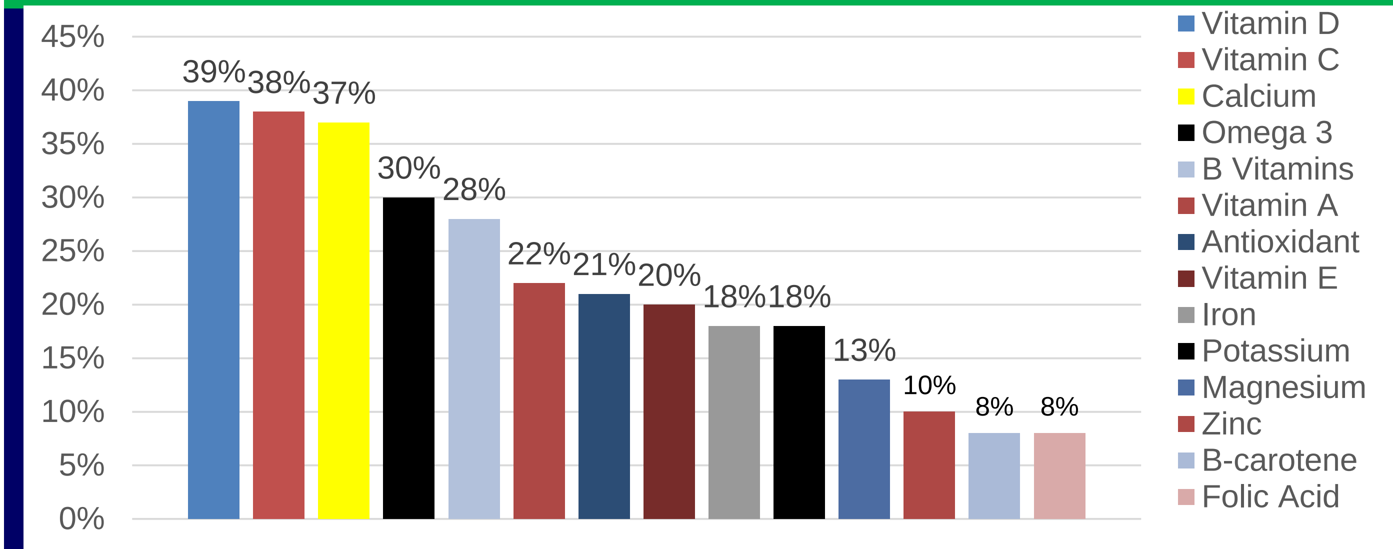
Body Toning - Sarcopenia – Immunity Satiety – Long-Lasting Energy, etc.

Wt. Loss Meal Replacement $3.3B to $4.3B '17
#1 or #2 Fastest Growing CPG Foods 5 Years[4]

1, IFIC, Food & Health Survey, 2014; 2.. HealthFocus, 2013; 3. Mintel, Performance Foods/Drinks, 2014; 54.IRI, 2014

Specialty Nutritionals #2 Only to Vitamins

76% Making Strong Effort Consume More Vitamins/Minerals 2013



Hot Nutritionals

- Vitamin D
- Vitamin C
- Potassium
- Magnesium
- Choline
- Fiber
- Prebiotics
- Iron
- Turmeric

Fastest Growing Supplements → 2018

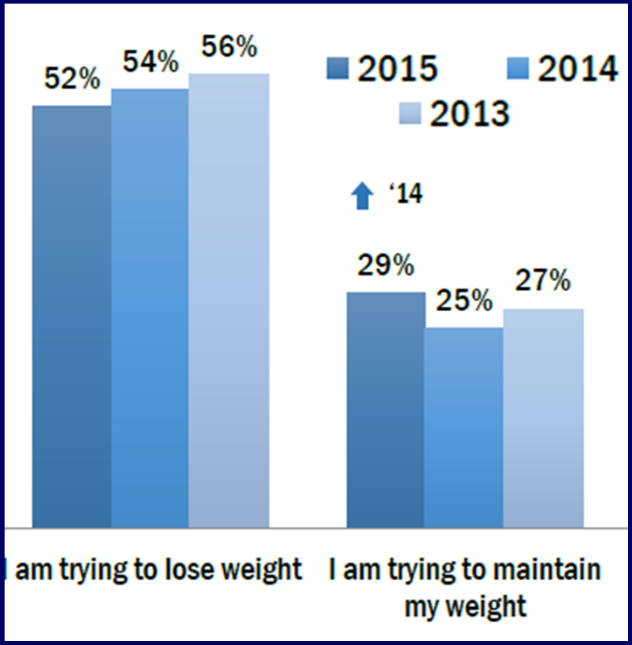
Fastest Growing Supplements to 2018			
	2015e	2016e	13-16 CAGR
Vitamin K, H, Other	1,661	1,806	8.9%
Milk Thistle	131	136	4.2%
Tumeric	197	235	21.5%
Magnesium	733	818	13.0%
Iron	409	438	7.1%
Vitamin D	832	902	8.5%
Vitamin B	2,210	2,414	10.2%
Probiotics	1,517	1,727	16.2%
Digestive Enzymes	273	291	6.3%
Melatonin	458	533	19.8%

2014 Gallup Study of Nutrient Knowledge & Consumption; Nutrition Business Journal, 2015; 3. Sloan Trends, 2015.

Men = 69% Growth Weight Sector 5 Years
Men 18-34 Drive Weight Maintenance +34%[1]

Overweight
- Men 80M, 73%
- Women 75M, 64%

Obese
- Men 37M, 34%
- Women 42% 36%



%Growth Watching Diet for Weight

Reason for Watching Diet	2009	2014	Growth 2009-2014	
			No.	%
Lose weight............	62,381	66,427	4,046	6.5%
Men	22,003	23,725	1,722	7.8
Women....................	40,378	42,702	2,324	5.8
Maintain weight......	28,104	31,703	3,599	12.8
Men	11,697	14,185	2,488	21.3
Women....................	16,407	17,518	1,111	6.8
Total	90,485	98,130	7,645	8.4
Men	33,700	37,910	4,210	12.5
Women....................	56,785	60,220	3,435	6.0

Use Nutritional Liq. Meal Replacements Weight Loss[2]

	Male	Female
	%	%
Protein supplement	**42**	**28**
Meal supplement	**16**	**24**
Vitamin/Mineral supplement	**18**	**13**
Weight loss	**7**	**22**
Energy supplement	**9**	**8**

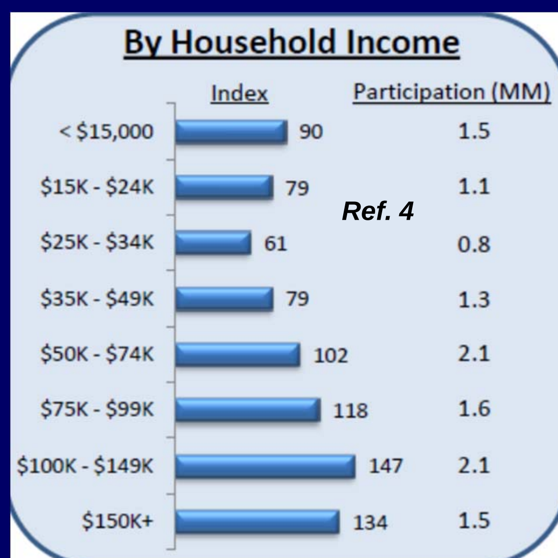
1, Packaged Facts, Weight Management, U.S. Consumer Mindsets, 8/2015; Food & Nutrition Survey, 2015, Mintel Performance Food, 2014

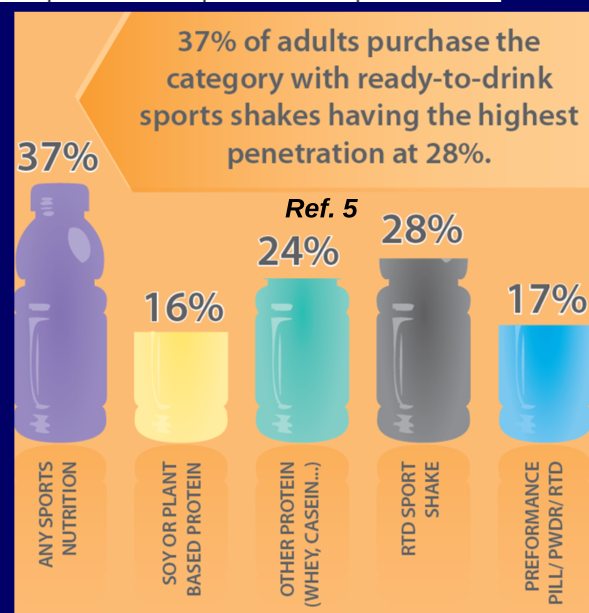
$31B Sports Nutrition Sector Mainstreams[1]
Hormel, Post Cereal Enter Sports Nutrition

Exercised Regularly Last 12 Months Ref.3	2004		2014		Change 2009-2014	
	No.	%	No.	%	No.	%
Men						
Yes	48,719	48.3%	54,429	48.8%	5,710	11.7%
No	48,775	48.3	55,106	49.4	6,331	13.0
Women						
Yes	57,065	52.0%	62,480	52.1%	5,415	9.5%
No	49,081	44.7	55,615	46.3	6,534	13.3

Women *in millions*
Ref. 2

Exercise Walking	58.7
Exercising with Equip.	29.4
Swimming	27.3
Aerobic Exercising	26.9
Camping	29.6
Workout at Club	18.8
Bicycle Riding	17.7
Running/Jogging	16.9

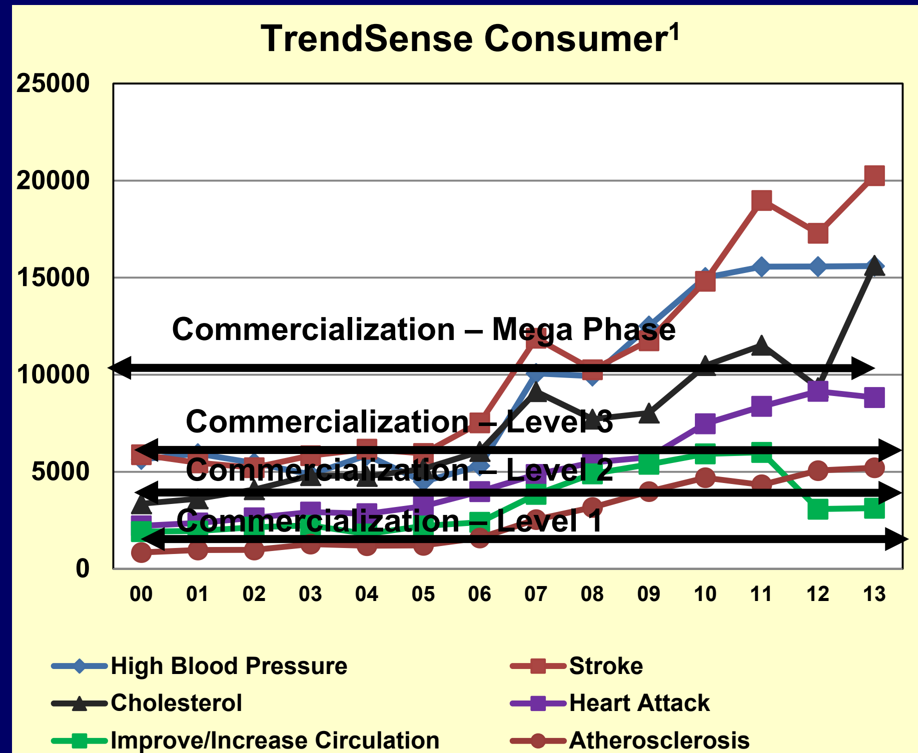




1. NBJ, 2015; 2.Pkg. Facts, Weight Rpt.,, 2015; 3. Nat'l Sporting Goods Assn., 2014; 4.TABS Supplement Survey, 2015,

New Heart Markets: Stroke, Blood Plaque; Heart Supplement Sales Est. $2.53B, +3.7% in 2015

2015[2] Millions	Men	Women
CVD	42.9	40.7
HBP	40.7	37.2
Cholest > 200	53.6	45.3
Cholest > 240	17.9	14.0
LDL>130 mg/dL	35.8	34.6
HDL<40	14.1	31.8
Diabetes (Diag)	10.1	9.6
Pre-diabetes	33.6	50.7
Stroke	3.8	3.0



Incidence: Stroke Increasing < Age 65

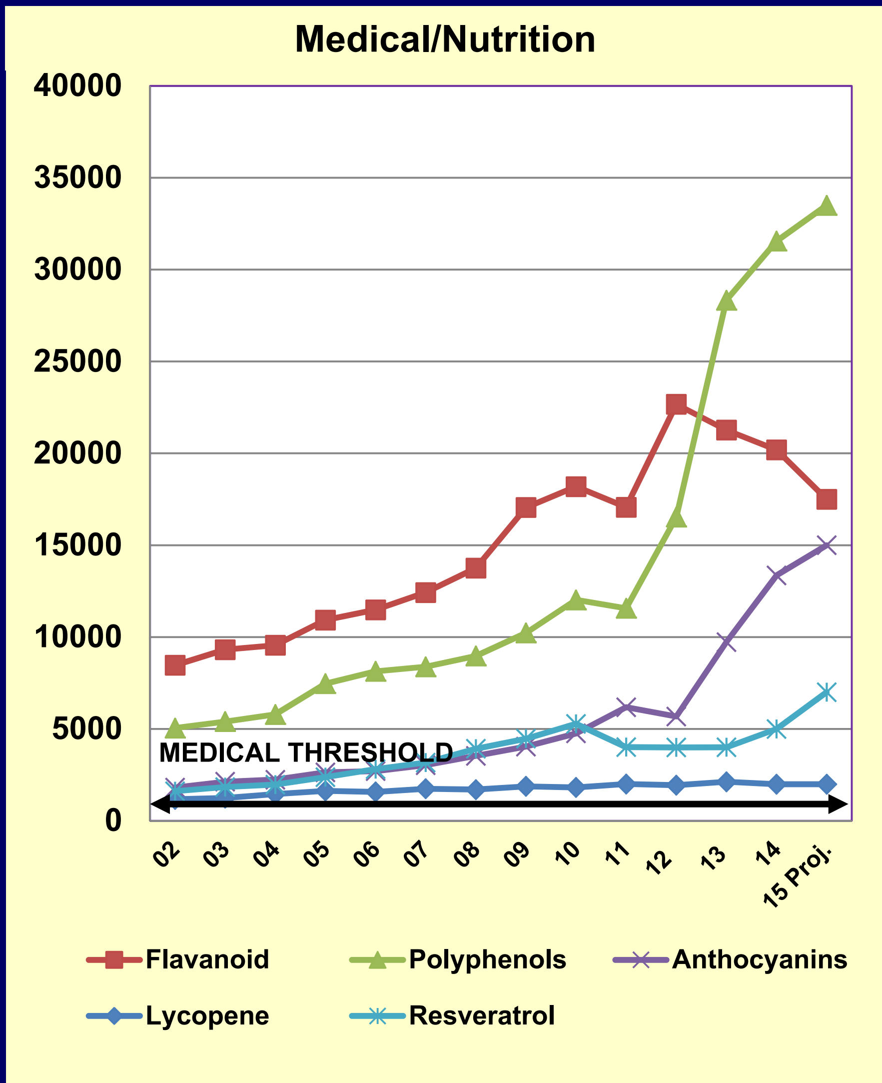
32% Women & 53% Men Have Undesirable Blood Plaque Levels[2]

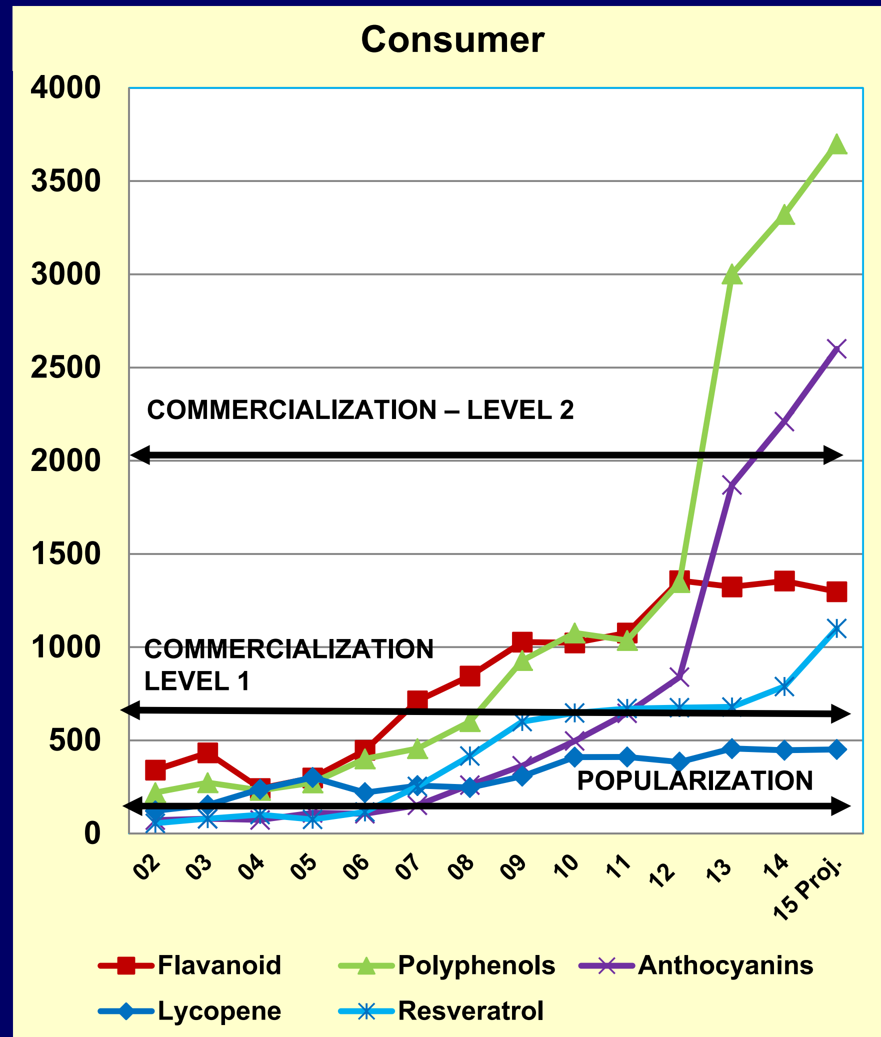
Don't have, afraid might get[3]	Male	Female
Heart disease	31	35
Heart attack	32	31
Strokes	30	30
Cardiovascular disease	28	29

M & W = Heart Issues Run in My Family 31%

1. Sloan Trends, Inc. 2012; Am. Heart Assn, Heart & Stroke Statistics, 2015; Mintel, Heart – US, 2013

TrendSense™ Predictive Model: Phytochemicals





Most Sought After Reasons: Functional Food

Health Concern	% All Adults	Improve Health %	Lose Weight %	Address Medical Issue %
High Cholesterol	25.5	30.8	27.8	52.9
Weight Loss	24.1	31.4	51.3	30.9
High Blood Pressure	23.4	29.4	28.0	44.0
Weight Management	22.7	31.7	37.9	30.6
Digestive Health	20.8	28.6	23.2	27.4
Improve Heart Health	20.6	29.0	22.7	30.9
Energy/Vitality	18.4	26.0	20.1	17.5
Immune System	16.7	23.2	17.9	18.2
Heart Disease	16.0	23.9	20.3	28.7
Joint or Bone Health	13.9	20.3	15.7	19.1
Diabetes/Impaired Glucose Metabolism	11.9	14.7	15.2	38.5
Hunger Control	10.9	13.2	14.9	13.4

Packaged Facts, Functional Foods Report, 2015; IRI 2015 Pacemakers

Sloan Trends, Inc.

20+ Years of Identifying Emerging Food/Beverage Opportunities

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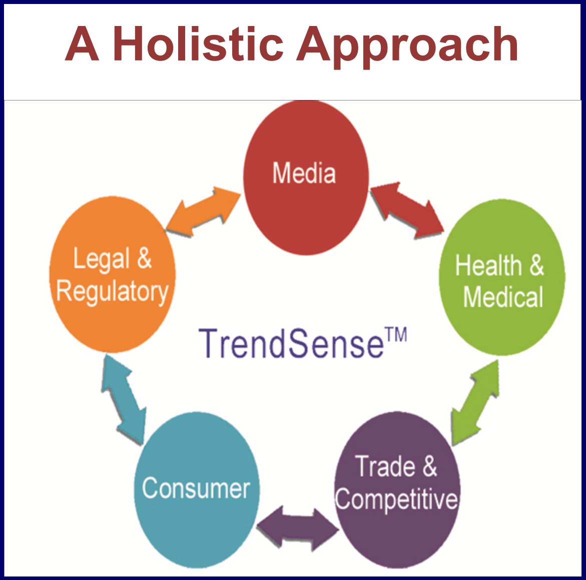

Dr. Catherine Adams Hutt
Science, Safety, Regulatory
630-605-3022 (cell)