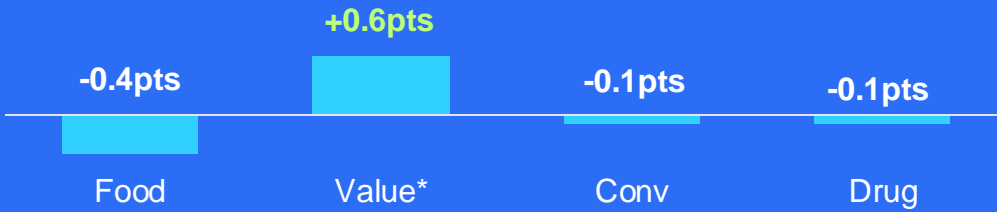


The Value Channel grows Unit Share of Snacking as consumers seek “good value for the money”



*Value = Mass + Club Channel + Dollar retailers

Good Value
Ensure your innovation items are in the **Value* Channel** where consumers expect to find them

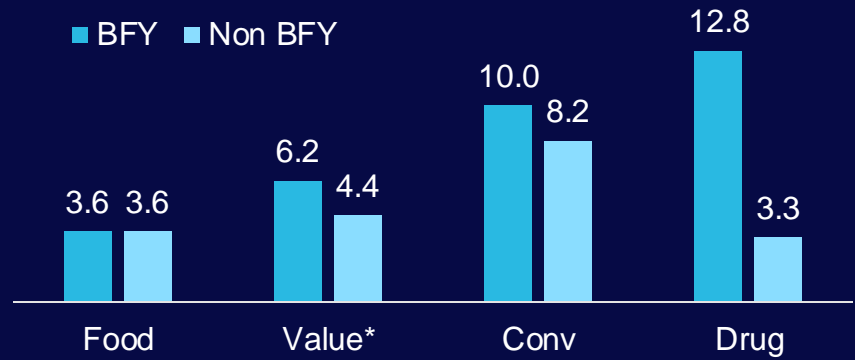
Better For You™
Snacking Product's 4 Year velocity CAGR outpaces Non BFY in All Channels

Attributes
Identify growing attributes important to your consumers, then activate and target

Snacking trends are favoring attributes like:
High Protein & Better For You™

Calculation
CAGR = $\left(\frac{\text{End Per}}{\text{Begin Per}}\right)^{\frac{1}{n}} - 1$ * 100
n = # of years

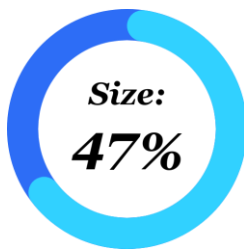
BFY \$/MM ACV 4 Year CAGR



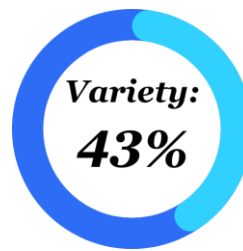
High Protein Snacks (>25G) grew +44% vs. YA, outpacing all other protein serving sizes.
67% of consumers want to try more protein.

In Cookies & Crackers, **size** leads the way, while in salty snacks, having **variety** is what stands out

Cookies & Crackers:



Salty Snacks:



Sub-type Alignment
Align product sub-types to match consumer expectations and realize growth

% Innovation Sales
(from manufacturers growing total sales & innovation sales)

Differentiation
Convince consumers of the value your innovation brings by differentiating

Private Label Snacking:

205 Innovation Index*
Innovation dollar share over-indexes compared to share of total market sales (\$495M generated in innovation sales)

Private Label Innovation is **booming**



...and growing market share and **outpacing Total Snacking \$ Growth (7% vs. 5%)**

