KETO, PALEO, WHOLE30, OH MY!

Understanding the Health Minded Consumer & Diet Trends

June 2019
TODAY’S ‘HEALTH MINDED SHOPPERS’

SAY HEALTH IS A TOP PRIORITY
• 18% of Americans reported Health as a top concern, next only to the Economy (22%) and Immigration (19%)

ACTIVELY MANAGE THEIR HEALTH
• 54% engage in a physical activity
• 28% visited a gym or used home exercise equipment

AWARE OF RISING HEALTHCARE COSTS
• 40% think out of pocket medical expenses have gone up
• 30% think healthcare costs will increase significantly over the next year

LOOK BEYOND MEDICINES TO MANAGE AILMENTS
• Beyond medicines, consumers are looking to manage ailments with Diet (21%), Exercise (19%), Vitamins (12%) and Supplements (12%)
AMERICANS CONTINUE TO PRIORITIZE HEALTH; INDUSTRY NEEDS TO FOLLOW
18% of Americans said Health is their biggest or 2nd biggest concern

Source: The Conference Board™ Global Consumer Confidence™ Survey, in collaboration with Nielsen – Q4 18
OUR HEALTH NEEDS TODAY ARE COMPLEX

THE WHY BEHIND THE BUY

AGING
AILMENT
NUTRITION
SUSTAINABILITY

FAIR TRADE
ORGANIC
PALEO
LOW GLYCEMIC

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### Are Consumers Satisfied with the Store’s Selection of Healthy Food?

<table>
<thead>
<tr>
<th>Store Type</th>
<th>% Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traditional Grocery</td>
<td>75%</td>
</tr>
<tr>
<td>Mass Merchandiser/Super Center</td>
<td>63%</td>
</tr>
<tr>
<td>Club/Warehouse</td>
<td>50%</td>
</tr>
<tr>
<td>Specialty Grocery</td>
<td>43%</td>
</tr>
<tr>
<td>Farmers Market</td>
<td>41%</td>
</tr>
<tr>
<td>Value Grocery</td>
<td>40%</td>
</tr>
<tr>
<td>Dollar Store</td>
<td>24%</td>
</tr>
<tr>
<td>Drug Store</td>
<td>24%</td>
</tr>
<tr>
<td>Online Only Retailer</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: Nielsen Health Care Survey, 2019
WELLNESS CLAIMS OUTPACING RETAIL GROWTH BY A WIDE MARGIN

TOP GROWING HEALTH & WELLNESS CLAIMS

Grain Free: 43%
Cruelty Free: 33%
Grass Fed: 28%
Corn Free: 25%
Spelt: 22%
Stevia: 20%
Free Range: 19%
Soy Free: 19%
Amaranth: 16%
Oil Free: 15%

Total Store 4-year CAGR: 1%

Source: Nielsen Retail Measurement Services, Total U.S. xAOC (UPC-coded + random-weight/Non-UPC) plus Convenience (UPC-coded), 52 weeks ended 3/30/2019
Note: Wellness claims are not additive; CAGR = Compounded Annual Growth Rate
SOME BIG SELLERS ARE ALSO BIG DRIVERS

**BIG SELLERS**
- Kosher
- Natural Presence
- Gluten Free
- Soy
- Natural
- GMO Free
- Preservative Free
- No Artificial Colors/FLVRS
- Low Fat
- Naturally No Caffeine

**BIG DRIVERS**
- Gluten Free
- GMO Free
- Natural
- Kosher
- Natural Presence
- No Artificial Colors/FLVRS
- Organic
- No Artificial Preservatives
- Soy
- Sugar Free

**UP & COMING**
- Cruelty Free
- Grass Fed
- Oil Free
- Grain Free
- Corn Free
- Free Range
- Soy Free
- Carb Conscious
- Stevia
- Spelt

**Big sellers that are also big drivers**

Source: Nielsen Health Care Survey, 2019; Top 10 claims: Big Sellers (top 10 by $ sales), Big Drivers (top 10 by $ absolute growth), Up & Coming (top 10 by $ % change vs year ago)
CONSUMERS LOOKING BEYOND MEDICINES TO MANAGE AILMENTS

MANAGING AILMENTS – MEDICINES AND MORE

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>RX AND/OR OTC NET</td>
<td>66%</td>
</tr>
<tr>
<td>PRESCRIPTION MEDICATION</td>
<td>43%</td>
</tr>
<tr>
<td>NON-PRESCRIPTION/OTC</td>
<td>30%</td>
</tr>
<tr>
<td>DIET</td>
<td>21%</td>
</tr>
<tr>
<td>EXERCISE</td>
<td>19%</td>
</tr>
<tr>
<td>VITAMINS</td>
<td>12%</td>
</tr>
<tr>
<td>SUPPLEMENTS</td>
<td>12%</td>
</tr>
</tbody>
</table>

Source: Nielsen Health Care Survey, 2019
AMERICANS CONTINUE TO USE DIET AS A TOOL TO MANAGE THEIR HEALTH

36% OF CONSUMERS ARE FOLLOWING A SPECIFIC DIET IN 2019

37% IN 2018
40% IN 2017
34% IN 2016

Source: Nielsen Health Care Survey, 2019
ABSENCE OF NEGATIVES SEEMS MORE IMPORTANT IN CHOOSING A DIET

## 2019 TOP DIET PREFERENCES

<table>
<thead>
<tr>
<th>Diet Type</th>
<th>2019</th>
<th>2018</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 LOW CARB</td>
<td>10%</td>
<td>11%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>2 LOW SUGAR</td>
<td>10%</td>
<td>10%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>3 LOW SODIUM</td>
<td>7%</td>
<td>8%</td>
<td>11%</td>
<td>-</td>
</tr>
<tr>
<td>4 KETO</td>
<td>6%</td>
<td>3%</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>5 LOW CALORIE</td>
<td>6%</td>
<td>7%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>6 LOW FAT</td>
<td>5%</td>
<td>6%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>7 HIGH PROTEIN</td>
<td>5%</td>
<td>6%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>8 DIABETIC DIET</td>
<td>4%</td>
<td>5%</td>
<td>7%</td>
<td>-</td>
</tr>
<tr>
<td>9 VEGETARIAN</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>10 HIGH FIBER</td>
<td>3%</td>
<td>4%</td>
<td>6%</td>
<td>-</td>
</tr>
</tbody>
</table>

Source: Nielsen Health Care Survey, 2019
# SOME MEDICAL CONDITIONS WARRANT SAYING ‘NO THANKS’ TO CERTAIN DIETS

## WHAT ARE CONSUMERS AVOIDING & ASSOCIATED AILMENTS

<table>
<thead>
<tr>
<th>Diet Type</th>
<th>Percentage</th>
<th>Condition</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Low Carb</strong></td>
<td>10%</td>
<td>Diabetes - Type I</td>
<td>20%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Celiac Disease</td>
<td>20%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Gluten Sensitivity</td>
<td>19%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Fibrocystic Breast Changes</td>
<td>19%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pre-Diabetes</td>
<td>19%</td>
</tr>
<tr>
<td><strong>Low Sugar</strong></td>
<td>10%</td>
<td>Fibrocystic Breast Changes</td>
<td>22%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Gluten Sensitivity</td>
<td>20%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Diabetes - Type II</td>
<td>20%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Diabetes - Type I</td>
<td>19%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pre-Diabetes</td>
<td>19%</td>
</tr>
<tr>
<td><strong>Low Sodium</strong></td>
<td>7%</td>
<td>Heart Disease</td>
<td>22%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Blood Conditions</td>
<td>16%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pre-Diabetes</td>
<td>14%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Fibrocystic Breast Changes</td>
<td>14%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Chronic Bronchitis</td>
<td>14%</td>
</tr>
<tr>
<td><strong>Low Calorie</strong></td>
<td>6%</td>
<td>Fibrocystic Breast Changes</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Blood Conditions</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Muscular Dystrophy</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Constipation – chronic</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Gum Disease</td>
<td>10%</td>
</tr>
<tr>
<td><strong>Low Fat</strong></td>
<td>5%</td>
<td>Fibrocystic Breast Changes</td>
<td>15%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Heart Disease</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Gum Disease</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Constipation – chronic</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Osteoporosis / Bone Loss</td>
<td>10%</td>
</tr>
<tr>
<td><strong>Low / No Gluten</strong></td>
<td>3%</td>
<td>Celiac Disease</td>
<td>62%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Gluten Sensitivity</td>
<td>56%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Autoimmune</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Allergies - food related only</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Lactose Intolerance</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: Nielsen Health Care Survey, 2019
THE WAY TO CONSUMERS WALLET IS THROUGH THEIR DIET

FOOD ATTRIBUTES THAT ARE IMPORTANT IN DECIDING WHAT TO BUY

HEART HEALTHY 58%
LOW SUGAR 56%
HIGH PROTEIN 54%
LOW SODIUM 52%
FREE OF HIGH FRUCTOSE CORN SYRUP 51%

NATURAL 51%
HIGH FIBER 50%
FREE OF ARTIFICIAL INGREDIENTS 50%
VITAMINS / MINERALS PRESENCE 47%
LOW FAT 46%

Source: Nielsen Health Care Survey, 2019
THE ‘HEART HEALTHY’ SHOPPER

said that HEART HEALTHY is a key influencer in deciding what to buy

58%

4% of respondents reported to have a household member with a heart disease

DIET PREFERENCES
• Low Sodium (22%)
• Low Sugar (17%)
• Diabetic Diet (13%)
• Low Carb (11%)
• Low Fat (11%)

WORKING ON HEALTH GOALS
• Physical activity (48%)
• Visited a gym (20%)

Source: Nielsen Health Care Survey, 2019
OVER HALF OF THE RESPONDENTS THINK HIGH PROTEIN IS AN IMPORTANT ATTRIBUTE

said that **HIGH PROTEIN** is a key influencer in deciding what to buy

| Source: Nielsen Health Care Survey, 2019  |
| Nielsen Retail Measurement Services, Total U.S. xAOC (UPC-coded + random-weight/Non-UPC) plus Convenience (UPC-coded), 52 weeks ended 3/30/2019 |

4-YEAR CAGR

- **EXCELLENT SOURCE OF PROTEIN**: 8%
- **GOOD SOURCE OF PROTEIN**: 7%

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THE ‘LOW SUGAR’ SHOPPER?

56% said that **LOW SUGAR** is a key influencer in deciding what to buy

4-YEAR CAGR

- **20%** STEVIA
- **12%** LOW GLYCEMIC
- **5%** NO SUGAR ADDED

In the past 6 months, HHs following specific diets:

- Low Sugar (10%), Keto (6%), Diabetic diet (4%), Paleo (1%) and Whole30 (1%)
TOP TRENDING DIET SALES GROWTH IN 2019

Low Sugar, Carb, and Calorie Diets trending most in 2019; Vegetarian Diet experiencing second highest absolute Dollar growth

<table>
<thead>
<tr>
<th>Diet Type</th>
<th>$ % Change</th>
<th>Dollar Sales</th>
<th>Abs $ Chg vs. YA</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOW SUGAR</td>
<td>2.7</td>
<td>97.6B</td>
<td>2.58</td>
</tr>
<tr>
<td>LOW CARBOHYDRATE</td>
<td>2.5</td>
<td>106.2B</td>
<td>2.68</td>
</tr>
<tr>
<td>LOW CALORIE</td>
<td>2.5</td>
<td>56.6B</td>
<td>1.48</td>
</tr>
<tr>
<td>NO SUGAR</td>
<td>2.4</td>
<td>31.2B</td>
<td>731.8M</td>
</tr>
<tr>
<td>MACROBIOTIC</td>
<td>1.9</td>
<td>50.8B</td>
<td>954.9M</td>
</tr>
<tr>
<td>PALEO</td>
<td>1.6</td>
<td>48.1B</td>
<td>775.3M</td>
</tr>
<tr>
<td>VEGAN</td>
<td>1.6</td>
<td>62.4B</td>
<td>1.08</td>
</tr>
<tr>
<td>PLANT BASED</td>
<td>1.6</td>
<td>80.0B</td>
<td>1.38</td>
</tr>
<tr>
<td>DASH YOUNGER YOU</td>
<td>1.5</td>
<td>29.5B</td>
<td>433.9M</td>
</tr>
<tr>
<td>CASEIN FREE</td>
<td>1.2</td>
<td>179.4B</td>
<td>2.18</td>
</tr>
<tr>
<td>VEGETARIAN</td>
<td>1.0</td>
<td>263.7B</td>
<td>2.68</td>
</tr>
<tr>
<td>HIGH POTASSIUM</td>
<td>0.9</td>
<td>47.0B</td>
<td>418.7M</td>
</tr>
<tr>
<td>IRON RICH</td>
<td>0.8</td>
<td>48.7B</td>
<td>408.3M</td>
</tr>
<tr>
<td>ATKINS 40</td>
<td>0.8</td>
<td>150.8B</td>
<td>1.28</td>
</tr>
<tr>
<td>HIGH PROTEIN</td>
<td>0.7</td>
<td>106.3B</td>
<td>744.6M</td>
</tr>
<tr>
<td>LOW SODIUM</td>
<td>0.7</td>
<td>102.1B</td>
<td>706M</td>
</tr>
<tr>
<td>PESCATARIAN</td>
<td>0.5</td>
<td>106.3B</td>
<td>542.1M</td>
</tr>
<tr>
<td>LOW FAT</td>
<td>0.5</td>
<td>154.0B</td>
<td>738.4M</td>
</tr>
</tbody>
</table>

Source: Nielsen Retail Measurement Services, Product Insider Characteristics, Total U.S. xAOC, 52 weeks ended 5/4/2019
Increased Keto and Mediterranean diet followers in 2019; Other fad diets trending down over time

In the past 6 months, have you or anyone in your household followed a special diet?

Source: Nielsen Health Care Survey, 2019
TRENDING DIET IMPACT & SALES GROWTH OVER TIME

Low Sugar, Calorie and Carb diets trending most in 2019, while Cholesterol Friendly, Dash, and Low Glycemic losing momentum the fastest in 2019

Source: Nielsen Retail Measurement Services, Product Insider Characteristics, Total U.S. xAOC, Annual 2016 - 2018
FOCUS ON WHAT CONSUMERS NEED IN THEIR HEALTH & WELLNESS JOURNEY

• Americans continue to prioritize **Health**; the CPG & retail industry needs to follow

• **Wellness claims** are outpacing the total store growth by a wide margin, representing an **opportunity to grow**

• Americans continue to use **Diet** as a tool to manage health. Consumers care **what’s in and what’s not in** their diets

• Consumers are voting for **top attributes** that they look for in their food. Manufacturers need to **listen and respond to win**
FAD DIETS...

- Weight Watchers
- South Beach Diet
- Volumetrics Diet
- Mediterranean Diet
- KETO
- The Raw Food Diet
- Vegetarian Diet
- Zone Diet
- Carnivore Diet
- PALEO-VEGAN ("PEGAN")
- Intermittent Fasting
- Flexitarian or Semi-Vegetarian Diet
- The Macrobiotic Diet
- Nutrisystem
- Whole30
- Atkins
WHAT WE KNOW ABOUT THE PALEO DIET

Also known as the Paleolithic diet, caveman diet, or stone-age diet

Designed to resemble what human hunter-gatherer ancestors ate thousands of years ago

Typically includes vegetables, fruits, nuts, roots, and meat

Excludes dairy products, grains, sugar, legumes, processed oils, salt, alcohol, or coffee

Bottom line: If it looks like it was made in a factory, don't eat it!
WHO IS THE PALEO SHOPPER?

Household Income over $100K, Caucasian Households, 2 Member and 3-4 Member Households

HH Income

- Under $20,000: 16.9%
- $20,000 - $29,999: 36.5%
- $30,000 - $39,999: 9.1%
- $40,000 - $49,999: 8.6%
- $50,000 - $69,999: 7.4%
- $70,000 - $99,999: 7.8%
- $100,000+: 13.7%

Race/Ethnicity

- Caucasian: 75.7%
- African American: 13.5%
- Asian: 8.4%
- Other: 11.8%

Members in HH

- Single Member: 33.5%
- Two Members: 17.8%
- 3-4 Members: 13.5%
- 5+ Members: 35.2%

Source: Nielsen Homescan Panel, Total US, Product Insider Characteristics, Latest 52 Weeks Ending 5/18/19
WHO IS THE PALEO SHOPPER?

Paleo Diet

- HoH Age 18-34
- Income $100K - $149,999
- Affluent Urban & Wealthy Countrysides
- Exec/Admin/Management
- 4 Member Households
- Children Under Age 6

Other High Indexing Demographics
- Affluent Sprawling Cities/Suburbs
- College Graduate
- Mountain
- Affluent Countrysides
- Upper Middle Sprawling Cities/Suburbs
- Married Family with kids
- Married

Source: Nielsen Spectra Consumer Profile, % HH Penetration Index, April 2019
TOP BRANDS—PALEO DIET

Among Paleo Diet purchases, Dole, Dasani, and Maxwell House are top ranked brands in the market.

<table>
<thead>
<tr>
<th>Rank</th>
<th>BRAND</th>
<th>xAOC REM $ % CHG</th>
<th># UPCs Selling</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>DOLE</td>
<td>-2.9</td>
<td>269</td>
</tr>
<tr>
<td>2</td>
<td>DASANI</td>
<td>-0.2</td>
<td>44</td>
</tr>
<tr>
<td>3</td>
<td>MAXWELL HOUSE</td>
<td>-8.4</td>
<td>115</td>
</tr>
<tr>
<td>4</td>
<td>FRESH EXPRESS</td>
<td>-9.5</td>
<td>52</td>
</tr>
<tr>
<td>5</td>
<td>NESTLE PURE LIFE</td>
<td>-6.0</td>
<td>25</td>
</tr>
<tr>
<td>6</td>
<td>BLUE DIAMOND</td>
<td>8.7</td>
<td>59</td>
</tr>
<tr>
<td>7</td>
<td>STAR KIST</td>
<td>5.3</td>
<td>61</td>
</tr>
<tr>
<td>8</td>
<td>WONDERFUL</td>
<td>-1.9</td>
<td>55</td>
</tr>
<tr>
<td>9</td>
<td>DUNKIN’</td>
<td>6.8</td>
<td>41</td>
</tr>
<tr>
<td>10</td>
<td>LA CROIX</td>
<td>5.4</td>
<td>64</td>
</tr>
</tbody>
</table>

- **Dole** is the most purchased brand among Paleo buyers, however, experiencing declines vs. last year.
- **Fruits & Nuts** are important components to this diet, which we see with **Dole** and **Blue Diamond** ranking among top ten brands.
- **Blue Diamond** experiencing the most growth among top ten brands vs. last year.
WHAT WE KNOW ABOUT THE KETO DIET

The ketogenic diet is a very low-carb, high-fat diet that shares many similarities with the Atkins and low-carb diets.

Involves drastically reducing carbohydrate intake and replacing it with fat. This reduction in carbs puts your body into a metabolic state called ketosis.

There are several versions of the keto diet. The standard (SKD) version is the most researched and most recommended.

Typically includes meat, fish, eggs, butter, nuts, healthy oils, avocados and plenty of low-carb veggies.

Avoid carb-based foods like grains, sugars, legumes, rice, potatoes, candy, juice and even most fruits.
**WHO IS THE KETO SHOPPER?**

Household Income over $100K, Caucasian Households, 2 Member Households

**HH Income**
- Under $20,000: 46.7%
- $20,000 - $29,999: 15.9%
- $30,000 - $39,999: 9.5%
- $40,000 - $49,999: 12.1%
- $50,000 - $69,999: 4.8%
- $60,000 - $99,999: 5.7%
- $100,000+

**Race/Ethnicity**
- Caucasian: 87.0%
- African American: 2.3%
- Asian: 5.3%
- Other: 5.4%

**Members in HH**
- Single Member: 19.8%
- Two Members: 42.6%
- 3-4 Members: 26.6%
- 5 or more Members: 11.0%

Source: Nielsen Homescan Panel, Total US, Latest 52 Weeks Ending 5/18/19
WHO IS THE KETO SHOPPER?

Keto Diet

- HoH Age 18-34
- Lower Middle Urban
- Farm/Forest/Fishing
- Female HoH Only with Kids
- Kids Age Under 18
- Sales Technicians & Admin Support

Other High Indexing Demographics

- Affluent Countrysides
- Married Family with kids
- Mountain
- 5+ Persons
- Exec/Admin/Management
- Age 35 - 44
- Hispanic
- $100,000 - $149,999
- 3 Persons

Source: Nielsen Spectra Consumer Profile, % HH Penetration Index, April 2019
# TOP BRANDS— KETO DIET

Among Keto Diet purchases, Bang, Real Ketones, and Taylor Farms are top ranked brands in the market.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Brand</th>
<th>Total xAOC $</th>
<th>xAOC REM $ % CHG</th>
<th># UPCs Selling</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>BANG</td>
<td>NA</td>
<td>NA</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td>REAL KETONES</td>
<td>215.6</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>TAYLOR FARMS</td>
<td>NA</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>ANCIENT NUTRITION</td>
<td>1,171.5</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>RAPID FIRE</td>
<td>NA</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>PRIMAL KITCHEN COLLAGEN FUEL</td>
<td>366.7</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>TESSEMAE'S PANTRY</td>
<td>NA</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>VITA CUP</td>
<td>NA</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>FAT SNAX</td>
<td>4,153.5</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>101 CIDER HOUSE</td>
<td>NA</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

- **Bang** and **Real Ketones** are the most purchased brands among Keto buyers during the latest 52 weeks.
- 4 of the top 10 brands saw significant growth during the last year, which could signal a new brand or line extensions to existing brands; Among top ten brands, **Fat Snax** is the fastest growing.
WHAT WE KNOW ABOUT THE WHOLE30 DIET

30
Elimination-style diet that asks dieters to ban all soy, dairy, grains, alcohol, legumes, and added sugars from their diet for 30 days straight

Helps to pinpoint which foods have been secretly affecting your physical and mental health

Typically includes Vegetables, Fruits, Unprocessed Meats, Seafood, Eggs, Nuts and seeds, Oils (some) and ghee, Coffee

Excludes, Dairy, Grains, Alcohol, Legumes, Added Sugar, Carrageenan, MSG, and Sulfites, “Junk” Food

Final Rule: Do not step on the scale or take any body measurements for 30 days!
WHO IS THE WHOLE30 SHOPPER?

Household Income over $100K, Caucasian Households, 2 Member and 3-4 Member Households

HH Income
- Under $20,000: 56.3%
- $20,000 - $29,999: 6.9%
- $30,000 - $39,999: 4.1%
- $40,000 - $49,999: 4.5%
- $50,000 - $69,999: 10.5%
- $70,000 - $99,999: 16.7%
- $100,000+: 4.0%

Race/Ethnicity
- Caucasian: 38.7%
- African American: 17.1%
- Asian: 32.3%
- Other: 11.9%

Members in HH
- Single Member: 11.9%
- Two Members: 38.7%
- 3-4 Members: 17.1%
- 5 or more Members: 32.3%

Source: Nielsen Homescan Panel, Total US, Latest 52 Weeks Ending 5/18/19
WHO IS THE WHOLE30 SHOPPER?

Whole30

- College Graduate
- HoH Age 18-34
- Prof/ Specialty & Exec/ Management
- Kids Under Age 6
- Affluent Countrysides & Mountain
- HH Income $100K - $149,999

Other High Indexing Demographics

3 Persons
- Affluent Urban
- Post College Degree
- Married Family with kids
- Wealthy Countrysides
  - Age 6 - 11
- Upper Middle Sprawling Cities/Suburbs
  - Maried
- Hispanic
  - Wealthy Sprawling Cities/Suburbs

4 Persons
- Affluent Countrysides & Mountain
  - College Graduate
- Upper Middle Urban
  - Kids Under Age 6
  - Prof/ Specialty & Exec/ Management

Source: Nielsen Spectra Consumer Profile, % HH Penetration Index, April 2019
### TOP BRANDS—WHOLE30 DIET

Among Whole30 Diet purchases, Primal Kitchen, Tessemae’s, and Hint are top ranked brands in the market.

<table>
<thead>
<tr>
<th>Total xAOC $ Rank</th>
<th>BRAND</th>
<th>xAOC REM $ % CHG</th>
<th># UPCs Selling</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PRIMAL KITCHEN</td>
<td>222.4</td>
<td>19</td>
</tr>
<tr>
<td>2</td>
<td>TESSEMAE’S</td>
<td>21.6</td>
<td>7</td>
</tr>
<tr>
<td>3</td>
<td>HINT</td>
<td>111.7</td>
<td>5</td>
</tr>
<tr>
<td>4</td>
<td>PEDERSON’S NATURAL FARMS</td>
<td>-25.6</td>
<td>6</td>
</tr>
<tr>
<td>5</td>
<td>RETHINK</td>
<td>542.9</td>
<td>6</td>
</tr>
<tr>
<td>6</td>
<td>VITAL PROTEINS</td>
<td>13,486.2</td>
<td>10</td>
</tr>
<tr>
<td>7</td>
<td>PRE</td>
<td>89.8</td>
<td>1</td>
</tr>
<tr>
<td>8</td>
<td>YAI’S THAI</td>
<td>151.9</td>
<td>8</td>
</tr>
<tr>
<td>9</td>
<td>FATWORKS</td>
<td>NA</td>
<td>1</td>
</tr>
<tr>
<td>10</td>
<td>CECE’S VEGGIE CO.</td>
<td>106.1</td>
<td>2</td>
</tr>
</tbody>
</table>

- Primal Kitchen and Tessemae’s are the most purchased brands among Whole30 buyers during the latest 52 weeks.
- Among top ten brands, Vital Proteins is the fastest growing brand during the last year.

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Nielsen AOD Homescan and Retail Measurement Service, Total U.S., Total xAOC, Latest 52 WE 5/25/19, Whole30 Diet
NOW LET’S COMPARE LIFESTYLES AND MEDIA PREFERENCES…
LIFESTYLE PREFERENCES

**PALEO DIET**
- Theme Parks
- Skiing, Snowboarding & Ice Skating
- Attends College Football Games Regularly
- Fantasy Sports League
- Business Club Membership

**KETO DIET**
- Online Search for Parenting Information
- Theme Parks
- Snorkeling
- Disney Cruise
- High School Sports

**WHOLE30 DIET**
- Snowboarding & Ice Skating
- Spinning
- Kick-boxing
- Attends College Football Games Regularly
- Fitness (from Cell Phone)

Source: Nielsen Spectra Targeting National Behaviors Model, April 2019
CABLE TV PREFERENCES

**PALEO DIET**
- Comedy Central
- [adult swim]
- PPV
- ESPN
- MTV
- Network
- HBO

**KETO DIET**
- Disney Junior
- Nick Jr.
- Disney XD
- PPV
- NFL
- Velocity
- Disney Channel

**WHOLE30 DIET**
- Disney Junior
- Nick Jr.
- Comedy Central
- [adult swim]
- NFL
- MTV2
- FX

Source: Nielsen Spectra Targeting National Behaviors Model, April 2019
INTERNET PREFERENCES

**PALEO DIET**
- reddit
- LinkedIn
- Yelp
- Tumblr
- Shutterfly
- Skype

**KETO DIET**
- Shutterfly
- LinkedIn
- Pinterest
- Reddit
- Yelp
- Instagram

**WHOLE30 DIET**
- Reddit
- Yelp
- Shutterfly
- LinkedIn
- Instagram
- Twitter

Source: Nielsen Spectra Targeting National Behaviors Model, April 2019
MAGAZINE PREFERENCES

PALEO DIET

KETO DIET

WHOLE30 DIET

Source: Nielsen Spectra Targeting National Behaviors Model, April 2019
CALL TO ACTION

Don’t miss the opportunity. Transparency and H&W will continue to drive growth across all channels, across food and non-food.

Understand the trends. Identify the attributes and ingredients that are driving growth in your business.

H&W is not a one-size-fits-all. Understand the consumer need across cohorts (i.e. generations, income, ailments).
QUESTIONS?
REFERENCES

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