Shell Shocked: Great Ops for Shelled Pecans

Dr. A. Elizabeth Sloan
National Pecan Shellers Association

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Sloan Trends Incorporated
Trends • Insights • Predictions

Sloan Trends, Inc.
www.sloantrend.com
760-741-9611

NPSA National Pecan Shellers Association
Pecans. So good. So good for you.

1 Targets 2012+

2 Hot Spots!

3 Culinary Cues

4 New Health Ops

Critical Insights: Selling More Pecans

1

Targets 2012+ !

Nuts #4 Snack Category, Penetration High, To Grow Infiltrate Other Snacks

Household Consumption of Snacks Past Month, April 2012

%	All	18-24	25-34	35-44	45-54	55-64	65+
Fresh fruit	92	92	89	92	90	94	95
Vegetables	92	92	91	91	89	95	93
Chips	88	93	89	93	87	88	80
Nuts	85	81	82	85	83	89	88
Crackers	83	82	81	83	83	88	84
Popcorn	74	82	75	78	74	74	64
Dried Fruit	67	67	66	63	62	67	75
Pretzels	54	67	55	55	54	51	46
Trail Mix	43	55	51	50	41	36	30

Low Sugar Trail Mix

Netherlands: Hazelnut Filled Chocolate Balls.

Switzerland műller Yogurt

Russia: Tchibo Freeze-Dried Instant Coffee with Whole Almond Kernels

Mintel, Nuts and Dried Fruit – US – August, 2012

Pecans Consumption Skews Older Grow: Target Younger Generation

Did you or anyone in your household eat any of the following types of nuts in the past month?

% All	All	18-24	25-34	35-44	45-54	55-64	65+
Peanuts	73	74	75	72	72	73	70
Almonds	61	62	63	61	61	67	56
Cashews	54	55	49	53	51	63	53
Pecans	44	39	39	41	45	51	49
Walnuts	42	41	38	37	39	46	49
Pistachios	40	49	40	40	38	40	34
Sunflower seeds	39	49	46	45	38	37	21
Macadamia nuts	29	36	31	36	24	28	20
Filberts/Hazelnuts	21	24	25	19	17	19	22
Other nuts	17	24	21	16	12	19	14
Brazil nuts	16	16	19	15	14	18	15
Pine nuts	11	12	16	11	10	9	10
Chestnuts	9	14	19	13	4	6	2
Hickory nuts	6	9	10	9	4	2	3

Young Adults Foodies/Gourmet: Substitute Pecans = High Appeal
Over Half of Consumers Don‟t use Pecans

Mintel, Nuts and Dried Fruit – US – August, 2012

HH with Kids Over Index Use of Nuts

Household Consumption of Nuts by Type

	All	Households with kids
	%	%
Fresh fruit	92	96
Vegetables	92	95
Chips	88	95
Nuts	85	87
Crackers	83	88
Popcorn	74	85
Dried Fruit	67	67
Pretzels	54	65
Trail Mix	43	58

	All	Households with children
	%	%
Peanuts	73	81
Almonds	61	70
Cashews	54	60
Pecans	44	56
Walnuts	42	50
Pistachios	40	47
Sunflower seeds	39	42
Macadamia nuts	29	38
Filberts/ Hazelnuts	21	28
Other nuts	17	22
Brazil nuts	16	20
Pine nuts	11	17
Chestnuts	9	16
Hickory nuts	6	12

12% Higher HH Use of Pecans with Kids

Mintel, Nuts and Dried Fruit – US – August, 2012

Use of Nuts by Eating Occasion Growth: Industry Sell-in, Up Top-of-Mind

	Nut Eaters	Nut Eaters with Kids
On their own as a snack	95	95
As a baking ingredient (such as cookies, brownies, or cakes)	62	70
Part of a trail mix	59	67
Add on salads	55	60
As an ingredient in entrees (eg, chicken with cashews)	45	53
As an appetizer for my guests	42	50
Add to cereal	38	50
Add to yogurt	36	46

HH Kids Bake More, Make Own Trail Mix, Entertain More, Add to Cereal & Yogurt a la Smoothies Capitalize on Consumer Behaviors

Mintel, Nuts and Dried Fruit – US – August, 2012

How Use Nuts by Age: Focus on Age Groups to Encourage Use

	All	18-24	25-34	35-44	45-54	55-64	65+
On their own as a snack:	95	93	93	96	96	94	85
Part of a trail mix:	59	75	69	66	60	49	42
Add on salads:	55	61	61	57	53	50	49
As a baking ingredient (such as cookies, brownies, or cakes):	48	68	67	63	59	59	59
As an ingredient in entrees (e.g., chicken with cashews):	45	58	54	47	44	39	37
As an appetizer for my guests:	42	48	51	46	43	39	32
Add to cereal:	38	46	45	40	34	31	37
Add to yogurt:	36	51	51	44	31	27	21

Appetizer 45+ Consumers, Use Entrees They Cook Most Often
Women Use more Nuts on Salads, More on Yogurt

Mintel, Nuts and Dried Fruit – US – August, 2012

Snack Users: Nuts Very Healthy Grow: Tout Even More Health Benefits

Health Perception Snacks Eaten Between Meals	Very healthy %	Somewhat healthy %
Fresh fruit	84	14
Raw vegetables	83	14
Nuts/seeds	53	40
Yogurt	52	44
Dried fruit	41	50
Rice cakes	29	58
Trail mix	26	59
Cereal	25	58
Cheese	24	56
Frozen yogurt	24	58
Snack bars (e.g., energy, cereal, or diet bars)	19	63
Popcorn	16	51
Fruit snacks (e.g., roll-ups)	14	38
Bagels	12	45
Meat snacks (e.g., jerky)	10	36
Pretzels	8	43
Chocolate	7	34
Crackers	7	49
Ice cream, cookies,	6	32

Australia: Freshlife Revitalise Fruit & Nut Mix
Berries, fruits, seeds, nuts and yogurt.

93% Nuts/Seeds Healthy – 53% Very, 40% Somewhat

Mintel, Nuts and Dried Fruit – US – August, 2012

Attitudes to Health Benefits Nuts, Age Grow: Solidify Beliefs, Add More Benefits

	All	18-24	25-34	35-44	45-54	55-64	65+
Nuts good source of protein	90	87	91	91	91	92	89
Nuts good source of energy	86	80	88	87	87	87	84
I limit amount of nuts, sodium (salt) content	34	34	35	35	29	36	36
I limit amount of nuts ,fat content	33	29	39	31	32	34	33
Interest in new products:							
I interested in buying foods with health claims, e.g., „good source of antioxidants"	68	63	74	70	68	71	63
I am interested in low-fat versions of nut snacks, e.g., combine nuts and fruit with other low-calorie or low-fat products	52	53	60	56	51	48	48
I would like to see more savory flavored nuts	45	58	56	47	40	41	30
I would like to see more sweet flavored nuts	33	49	45	40	28	25	19

Use unique Flavors, Spicy, Ethnic to Attract Young Adults

Women More Interested in High Fiber, Bone Health Potential

Mintel, Nuts and Dried Fruit – US – August, 2012

Fewer Think Trail Mix Healthy Grow: Healthier, More Unique Flavors

43% Households Eat Trail Mix, 55% of those Aged 18-24

%	All	18-24	25-34	35-44	45-54	55-64	65+
Trail mixes with just nuts and fruit:	82	84	81	83	75	84	84
Trail mixes with just nuts:	72	77	78	77	72	69	60
Trail mixes with just nuts, fruits, and seeds:	67	69	67	67	64	64	62
Trail mixes with nuts and fruit and other ingredients (e.g., chocolate chips or other type of candy):	60	72	66	63	62	43	46
Trail mixes with just fruits and seeds:	56	60	62	58	51	50	48
Trail mixes with coated nuts and fruit (e.g., yogurt, chocolate-covered	55	65	67	56	54	37	36
My own made up trail mix:	40	49	54	37	31	33	29
Some other kind of trail mix:	34	36	35	30	33	34	37

Only 26% Trail Mix = Very Healthy
60% Would Buy More Trail Mix if Lower in Sugar

Mintel, Nuts and Dried Fruit – US – August, 2012

Breakfast, Snacks = Strong Growth

2

Hot Spots!

Fastest Growth Eating Occasions → 2018 Breakfast & Snacks

Food Groups	%Change in Eatings U.S.(F2018 vs. 2008)*
Involved Breakfast Foods	10.4
Heat and Eat Breakfast Foods	13.4
Simple Breakfast Foods	12.5
Combination Dishes	12.1
Centre of Plate Proteins	15.1
Heat and Eat Entrees	13.4
Quick Assembly Lunches	10.1
Warm Sides	12.7
Salads	11.7
Side Dish Breads	10.5
Easy Meals	16.0
Salty/Savory Snack Foods	16.1
Sweet Snacks/Desserts	14.0
Forecasted population growth:	10.1%

Growing faster than population by at least 3 points

Growing faster than population by less than 3 points

*Food trends are for in-home or carried from home situations, excludes purchased and consumed away- from-home	Forecasted Overall Growth	By Generation, Highest Increase in Servings over Next Decade
Salty/savory snacks	16.10%	Gen Y +44%
Easy meals	16.00%	Gen Y +42%
Center of plate proteins	15.10%	Gen Y +22%
Sweet snacks/desserts	14.00%	Gen Y +34%
Heat and eat breakfasts	13.40%	Gen Z +4%

1. The NPD Group, "A Look into the Future of Eating , 5/11

1 in 5 Eat Breakfast More > 2 Years Ago

Multi-Location Breakfast = 27% Home, Drive-thru, & Mid-AM Snack 39%,+9%

Top Growth Breakfast Restaurants

- Egg Whites
- Parfait
- Compote
- Yogurt
- Turkey/Chicken Sausage
- Stuffed French Toast
- Chilaquiles/Frittata

27% bring breakfast from home eat at work, 30% en route, 10% kids take breakfast to school

Breakfast most important meal for dieters

Ethnic Breakfasts ACF Chefs Hot for 2012

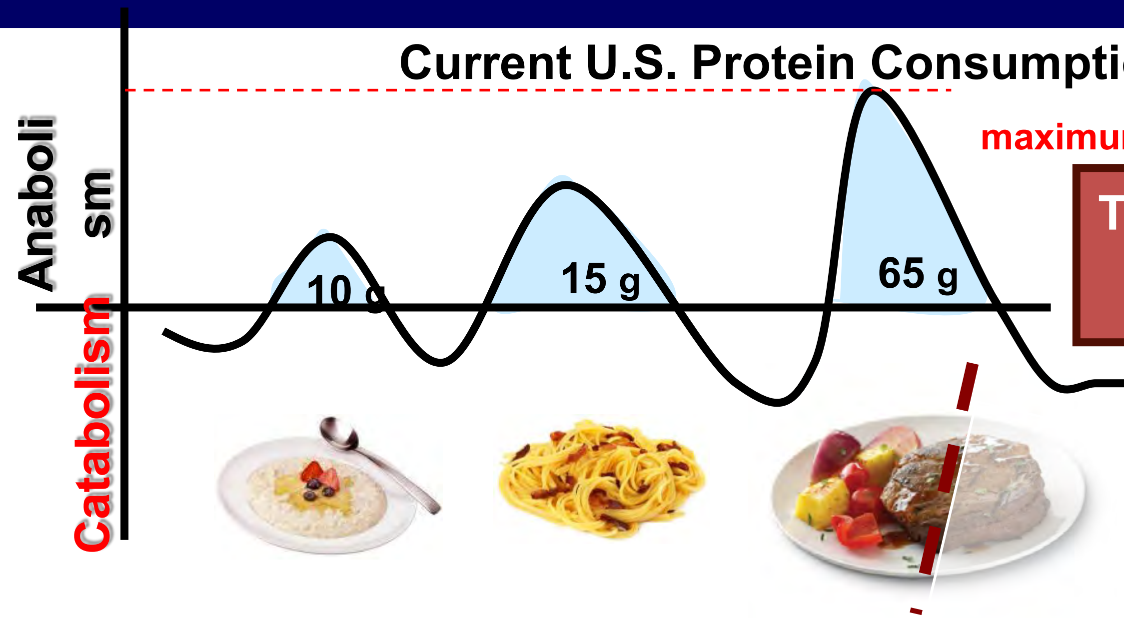
Hot '12

Would Eat Breakfast More Often, if Helped with Energy, Weight, Feel Full

Technomic, Consumer Breakfast Trend Rpt.,,„11; FMI, 2011; Dataessential, 2012; NRA, What‘s Hot Survey, for 2012/2011;. IFIC, 2008.

Protein Breakfast Super Star Status
Moderate Protein Intake 25-30g, 3X/Day
Optimizes Weight /Muscle

Current U.S. Protein Consumption Pattern



maximum rate of protein synthesis

Total Protein 90 g

~ 1.3 g/kg/day

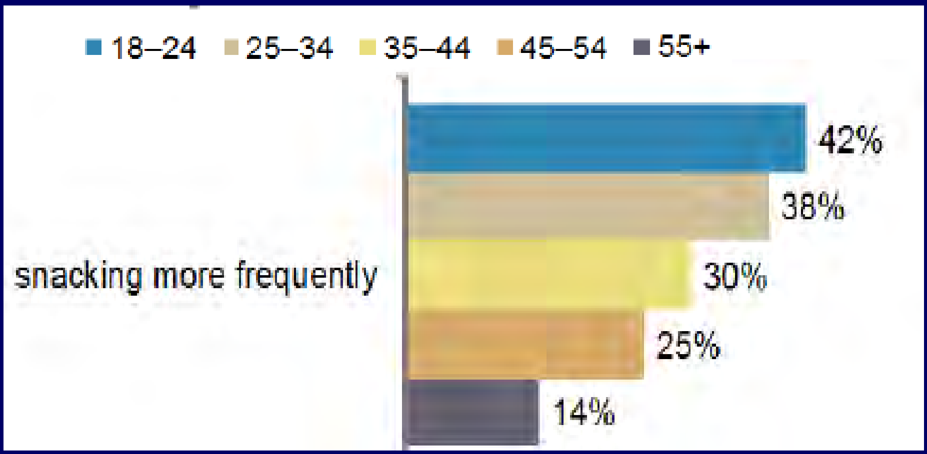
A skewed daily protein distribution fails
to maximize potential for muscle growth
Recommend Moderate Protein Intake Thru Day

Paddon-Jones and Rasmussen 2009

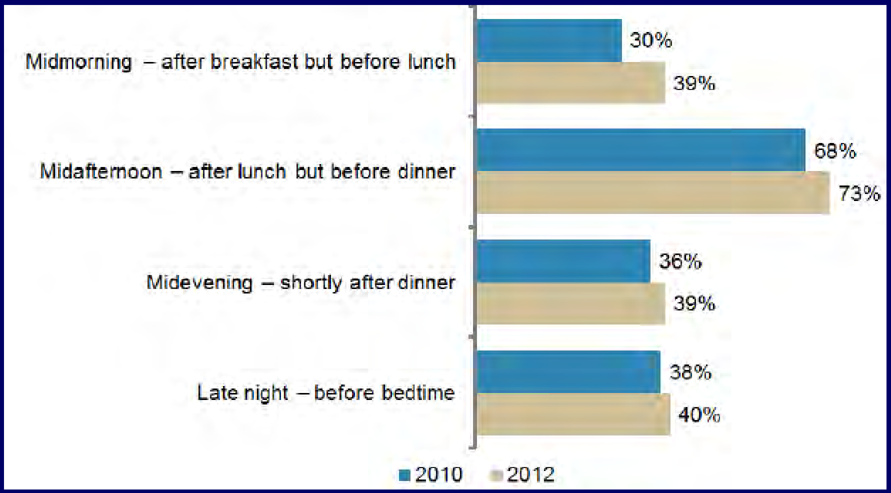
Current US Diet Only 10 g. Protein at Breakfast
Typical Breakfast Foods Toast, Cereals, Low in Protein

Snacks Up All Ages, Hi Protein +28% „11

Snacking More Often vs. 2 yrs. [2]



A.M., Afternoon Snacking[2]



Products with Front of Package Protein Attributes

Volume Sales Growth 2011 vs. 2010

Healthy & Immediate Consumption[2]

Ref #1 % Adults	April 2007-June 2008	April 2008-June 2009	April 2009-June 2010	April 2010-June 2011
Eat energy/diet snacks and bars	14	12	13	13
Eat nutritional snacks (granola, fruit, etc.)	52	52	55	56

1. Mintel, Nutrition and Energy Bars - US - February, 2012; 2. Technomic, Inc., The Snacking Occasion Consumer Trend Report. 2012

Snacks Switch to Savory, Heartier

Total Vol. Growth Healthier +0.1%	
Nutritional Snacks/Trail Mix	+11.1%
Hummus	+10.5%
Dry Fruit Snacks	+3.0%
Natural String Cheese	+2.4%
Sugarless Gum	+1.6%

36% Healthy Snack Vol. Grew

Total Vol. Growth Indulgent -0.1%	
Ch. Covered Salted Snacks	+8.6%
Dried Meat Snacks	+6.0%
Rfg. Appetizers/Snack Roll	+5.9%
HH Non-Breakfast Entrees	+3.8%
Fz. Appetizers/Snack Rolls	+3.3%

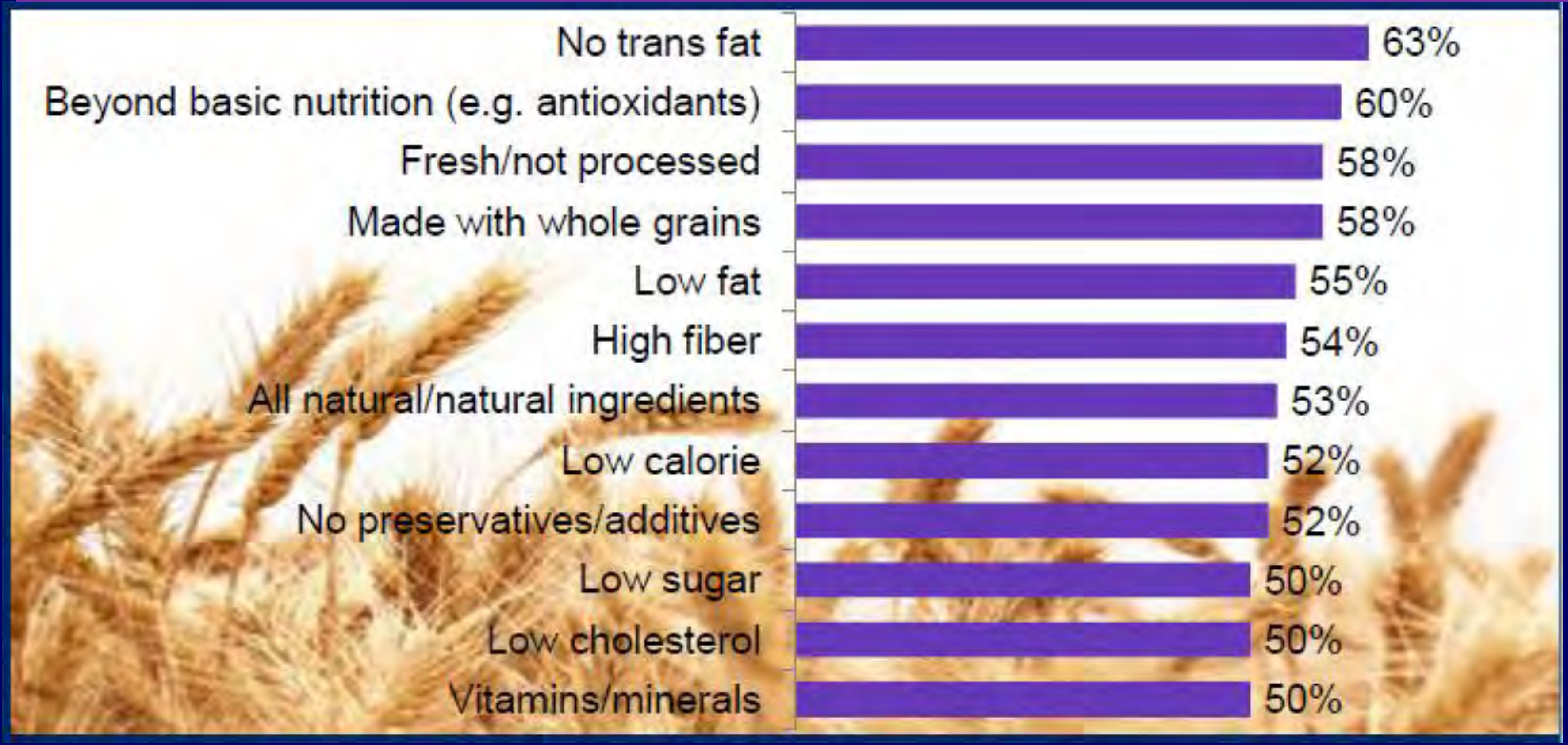
52% of Indulgent Snack Vol. Grew

- ✓ Premium/Gourmet Snacking is Growing
- ✓ Texture Claims are Growing

SymphonyIRI, SnaxPo, 3/2012; Mintel, Nutrition & Energy Bars – US – 2/2012

Functional Snacks, High Demand

Important Attributes of Healthy Snack
% of Consumers



After Trans Fat
Beyond Basic Nutrition e.g., antioxidants
#2 Most Important Snack Attribute[1]

✓ 56% Snacks & Energy Boost
✓ Organic & Natural Snacks + 11%

SymphonyIRI, 2012

Snack Occasions Where Nuts Shine

33% of Adults Snacking Alone is Savoring

Most Common Snacks- by Snack Occasion
% of Consumers Snacking Almost Daily During Occasion

Evening	
Ice Cream	54%
Salty Snacks	50%
Chocolate	49%
Snack Nuts	47%
Cookies	45%

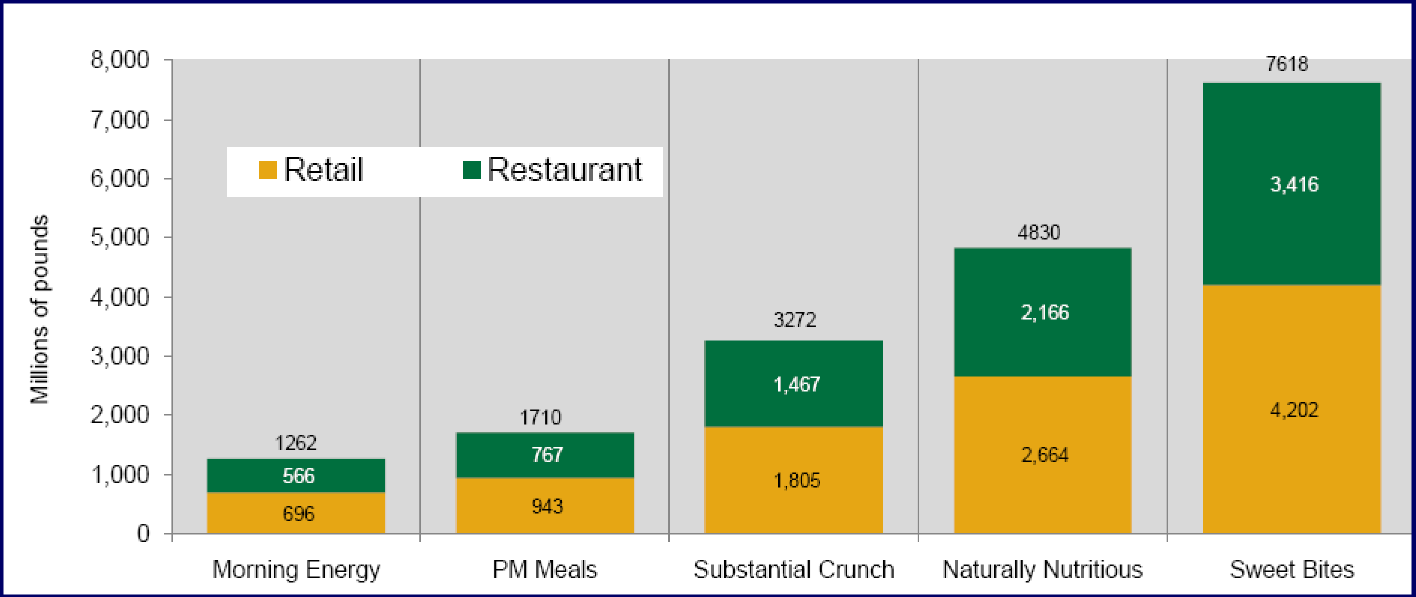
Special Occasion	
Ice Cream/Sherbet	43%
Chocolate Candy	38%
Cookies	26%
Non-Chocolate Candy	16%
Snack Nuts	15%

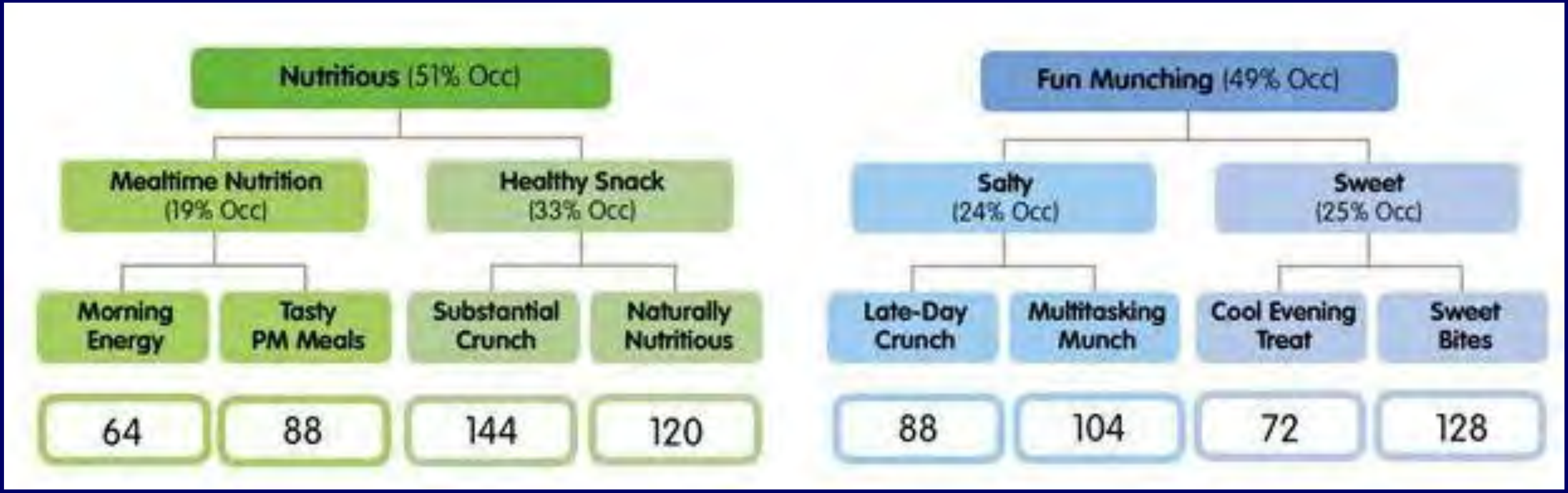
Hunger	
Snack/Granola Bars	70%
Meat Snacks	67%
Crackers	65%
Snack Nuts/Seeds	57%
Yogurt	56%

Indulgence	
Ice Cream/Sherbet	74%
Chocolate Candy	56%
Cookies	47%
Non-Chocolate Candy	42%
Snack/Granola Bars	32%

SymphonyIRI, SnaxpO State of the Snack Food Industry Presentation, 4/2012

U.S. Snack Market Opportunity Areas





Get Your Share of Snack Time, Food Product Development Webinar, Feb. 2011

37% Entertained More at Home „12 Half Monthly, 1 in 5 Weekly, Gen Y #1[1]

% did activity last time they entertained at home[2]:

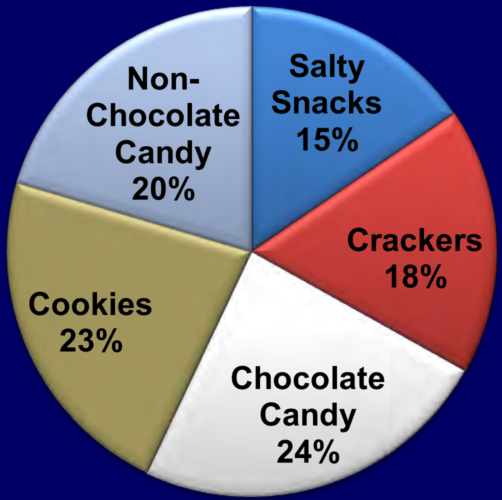
Boomers & Older – Fancier Cocktail Companions

73% Snack More Social Events

36% Buy Gourmet to Entertain[3]

24% Use Gourmet Impress Guests

34% Pay More Gourmet Snacks +16% Last 2 Yrs.→



1. SymphonyIRI, SnaxPo Keynote, 4/2012; 2. Roper GfK, 2009; 3. NAFST, 2010; 4. Technomic, Partier Off Premise Report 2010

National Pecan Shellers Association

3

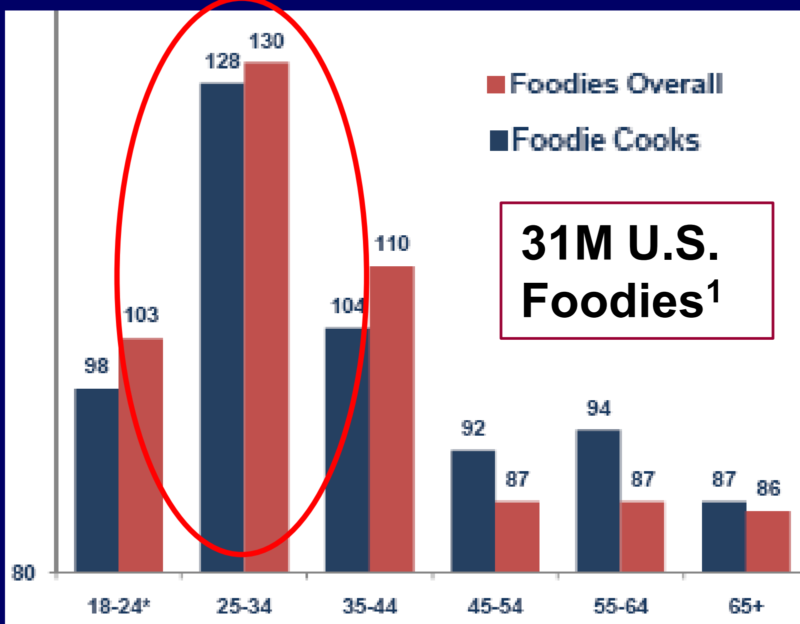
Culinary Cues



New Upscale "Savoring" Eating Experience

Savoring – a more sophisticated culinary food experience – one defined by freshness, distinctive flavors, foodie narratives, storytelling, etc.[1]

44% Adult Eating Now Alone, Alone Eating More Savoring, 33% Snacking Savoring[1]



Top 10 Eating Occasions[3]

Inst. Afternoon Snack 11.2%
Instrumental Lunch 10.4%
Savoring Dinner 10.1%
Instrumental Breakfast 9.0%
Instrumental Dinner 8.8%
Savoring Lunch 6.9%
Instrumental Morning Snack 6.2%
Savoring Breakfast 6.2%
Instrumental Late Night Meal 5.3%
Savoring Afternoon Snack 4.7%

Use Specialty Foods[3]

All	63
Age	
18-24	78
25-34	74
35-44	67
45-54	61
55-64	52
65+	47

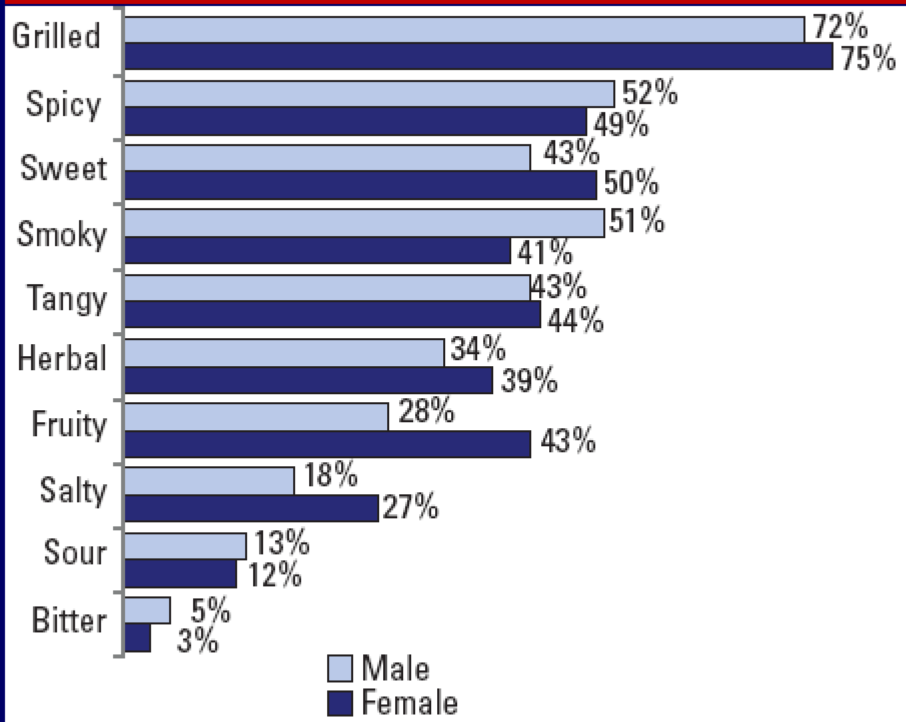
Prefer Food Lots of Spices[4]

Age	
18-24	120*
25-34	112
55-64	86
65-74	91
75+	54

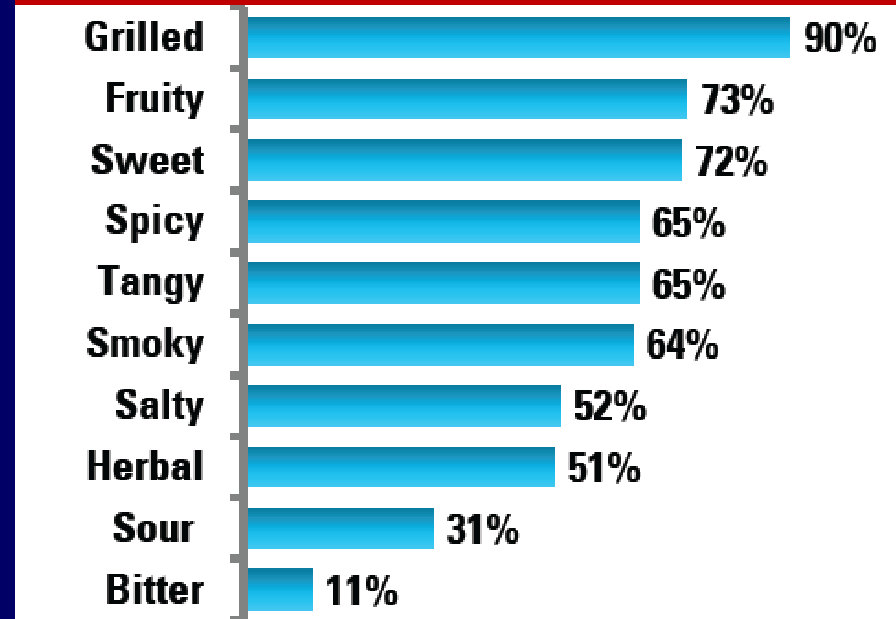
1.The Hartman Group, Eating by the Numbers, 2011; 2. Pkg. Facts, Foodie Cohorts, 2011; 3. NAFST, Specialty Food Consumer, 2010; 4. Experian, 2011

Dramatic Change in America"s Flavor Profile

Consumers Favorite Flavors 2009 [1]



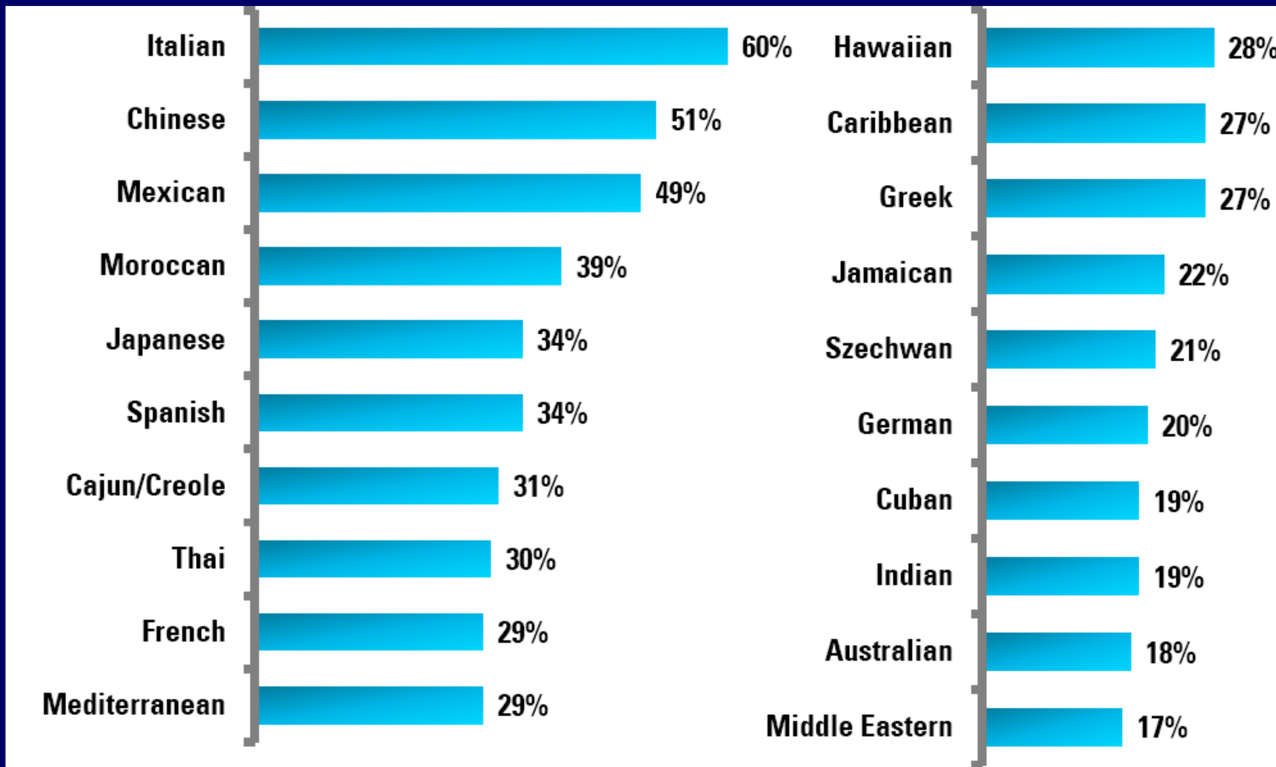
Consumers Favorite Flavors 2011[2]



1.Technomic,, Flavor Rpt., 20109 2. Technomic, American Express Market Brief, June 2011

Substitute Pecans Other Nuts: Fusion

At a restaurant, %definitely would order menu item made with typical/flavors & ingredients of these ethnic cuisines[1]



Hot Cuisines 2012+[2]

1	Ethnic fusion cuisine
2	Peruvian cuisine
3	Regional ethnic cuisine
4	Cuban cuisine
5	Southeast Asian cuisine (e.g. Thai, Vietnamese, Malaysian)
6	North African/Maghreb cuisine
7	Korean cuisine
8	Latin American/Nuevo Latino cuisine
9	Mediterranean cuisine
10	Nordic/Scandinavian cuisine

Hot '12

- **Age 18-34 Most Likely to Cook Ethnic Foods[3]**
- **Home Ethnic Meals Up in Frequency, Variety**
- **12% American Make a Stir-fry Typical Week**

1. Technomic, American Express Market Brief, June 2011 ; 2.NRA What's Hot? 2012; 3. Mintel, Ethnic Foods – US, 2012

Grown in U.S. Extremely Imp. 92%[1]

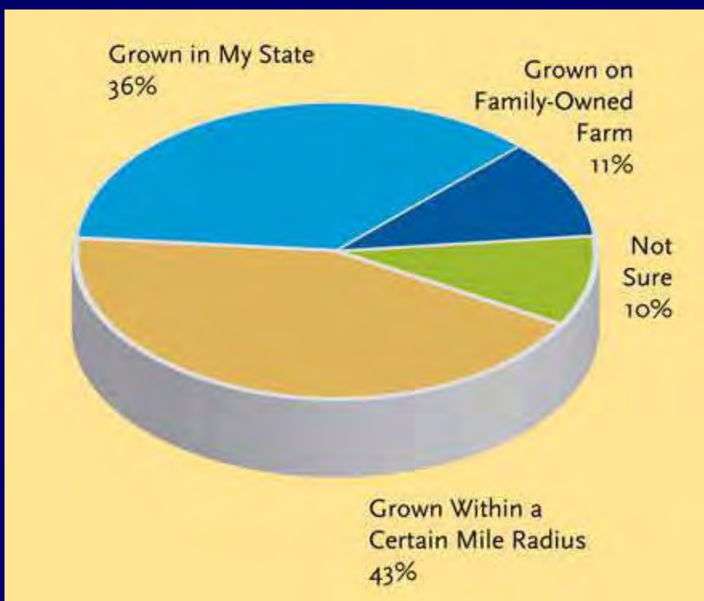
Leading American Cuisines
Restaurant Menus
Southern, Am. Seaboard
Am. Barbecue[2]

Alaska ↑
Buy 75%

Top on Menu:[2]

1. Texas
2. New York-style
3. Southwestern
4. Southern-style
5. California

44% Define Local "State" +14% 2 Yr[3]



71% Buy Local/State if Aware
Inc. Local Processed, Jams, etc.[3]

Purchases of International/Ethnic Foods by Age

	All %	18-24	25-34	35-44	45-54	55-64	65+
Italian	55	49	64	55	51	54	50
Mexican	52	57	62	55	50	51	36
Asian – Chinese	39	44	49	45	33	28	28
Regional American Food	29	28	38	32	25	23	20

58% Very Interested in Southern, 51% Low Country Cuisine

1. Foodservice Research Inst.,, MenuMine 2011; 2. Mintel, 2010; 3. FMI., 2011; 4. NRA. 2011 Forecast; 4. NASFT, 2010

Close to the Farm

The hottest trend in restaurant concepts in 2010: gardens

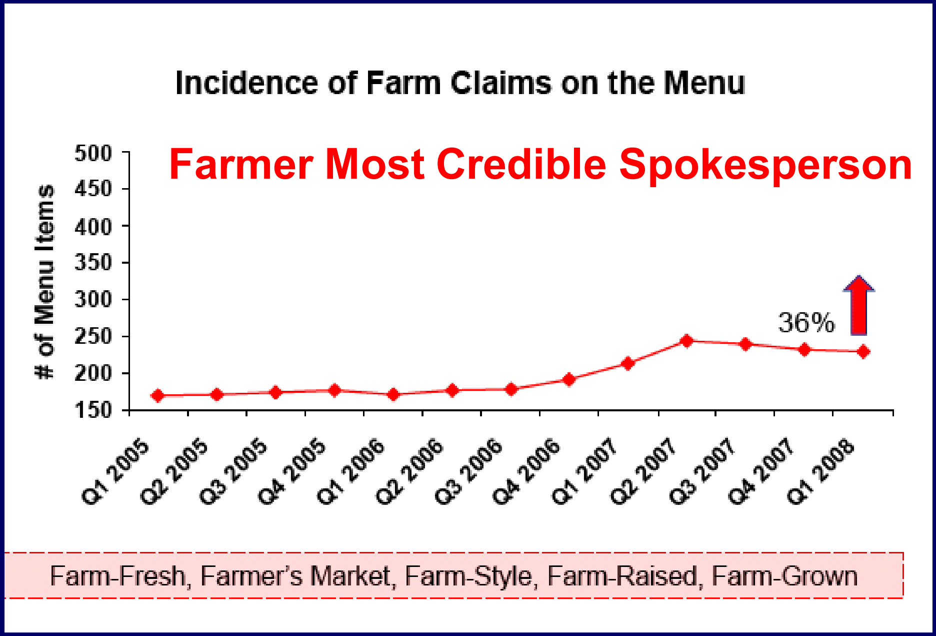
Chefs predict restaurants with gardens — rooftop, backyard, community or other types of gardens — will be the top trend in new restaurant concepts for 2010. Other hot concepts in the top five, according to chefs:

1. Restaurants with gardens
2. Cooking classes/demonstrations
3. Street food and mobile food trucks/carts
4. Restaurants on farms
5. Gastropubs

Download the full results of the National Restaurant Association's 2010 "What's Hot" survey at www.restaurant.org/foodtrends.

Farm-Fresh, Farmer's Market, Farm-Style, Farm-Grown claims + 80% menus 3 yrs.

"I believe the producer/grower will become the next series of celebrities to hit the food circuit" …Al Ferone, Hilton Hotel Corp



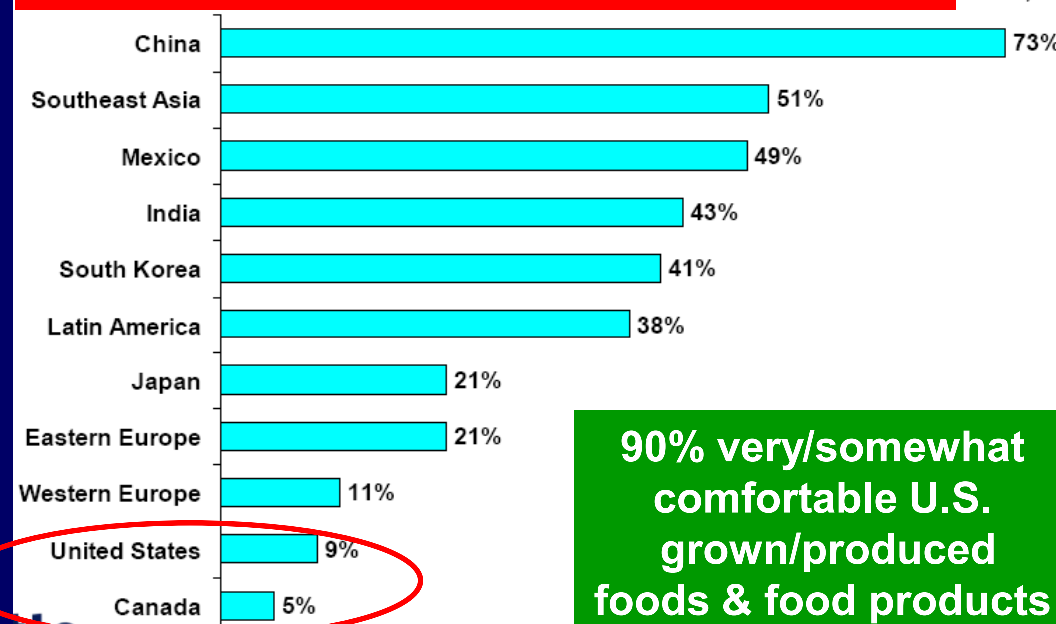
Mintel Menu Insights, 2010, Nat'l Restaurant Assn., 2012

Sourcing, Grown/Made in the USA

International Sourcing Low Comfort Level

	Very comfortable	Somewhat comfortable
United States	64%	33%
Canada	48	44
Western Europe	17	45
Latin and South America	12	51
Eastern Europe/ Russia	9	38
India	6	27
China	6	24
Southeast Asia	5	28
Africa	5	26
Middle East	5	24

Concern Safety Products: *"Extremely"*



90% very/somewhat comfortable U.S. grown/produced foods & food products

67% info Country Origin *extremely* imp "Food Related Products"

Tout Grown in the USA When Possible

HOW MANY WILL PAY MORE FOR WHAT

ATTRIBUTE	TOTAL SELECTING
Base	1,017
Made in U.S.	41%

Concern Safety Products Other Countries: *"Extremely"*

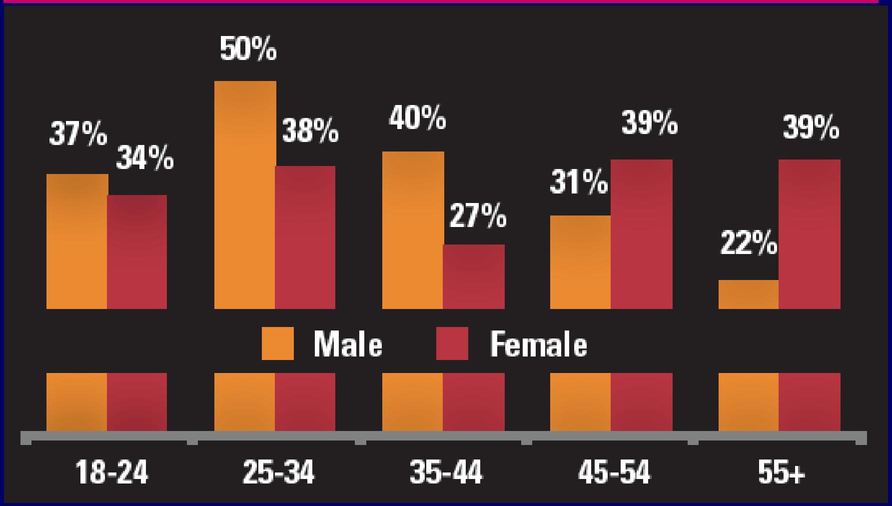
	Male	Female	18 to 34	35 to 54	55 or older	Not College Grad	College Grad	Married	Single
Fresh food	68%	77%	68%	73%	76%	79%	68%	74%	66%
Prescription drugs	70%	74%	70%	72%	75%	77%	69%	74%	66%
Packaged food/beverage	55%	66%	56%	61%	66%	66%	56%	62%	52%

Deloitte, Consumer Product Safety, 2011; FMI Shopper Trends US, 2011

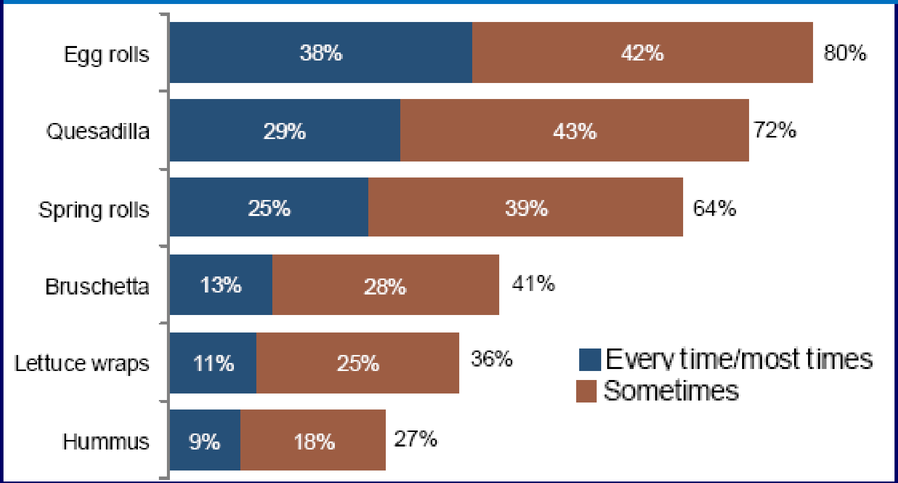
Snacks, Finger Food, Appetizers

Hot '12

Willing Pay More Dipping Sauce:



How Often do you order:[1]



Hors D"œuvres

Pupusas

Dipping Morsels Soup

What's Hot 2012?

1. Veg/Vegetarian appetizers
2. Ethnic/ Street food inspired appetizers e.g. tempura, kabobs, Taquitos, hummu s
3. Charcuterie plates/samplers
4. Amuse-bouche/ bite-size hors d'oeuvres
5. Warm appetizer salads

1. NRA/ACF "What's Hot ?, 10/2011; 2. Technomic, Flavor Trend Report, 2011

Center Plate & Sides

Hot 2012 ACF Chefs

Hot '12

MAIN DISHES/CENTER OF THE PLATE

1	Locally sourced meats and seafood
2	Sustainable seafood
3	Newly fabricated cuts of meat (e.g. Denver steak, pork flat iron, Petite Tender)
4	Non-traditional fish (e.g. branzino, Arctic char, barramundi)
5	Half-portions/smaller portion sizes
6	Street food-inspired main courses (e.g. tacos, satay, kabobs)
7	Grass-fed beef
8	Lower-sodium entrees
9	Specialty/gourmet sandwiches
10	Inexpensive/underused cuts of meat (e.g. brisket, shoulder, skirt steak)
12	Free-range pork/poultry
13	Meatless/vegetarian items

Hot Side Dishes 2012

1	Non-wheat noodles/pasta (e.g. quinoa, rice, buckwheat)
2	Black rice
3	Quinoa
4	Red rice
5	Vegetable pickles
6	Asian noodles (e.g. soba, udon)
7	Braised vegetables
8	Sweet potato fries
9	Steamed/grilled/roasted vegetables
10	Brown/wild rice

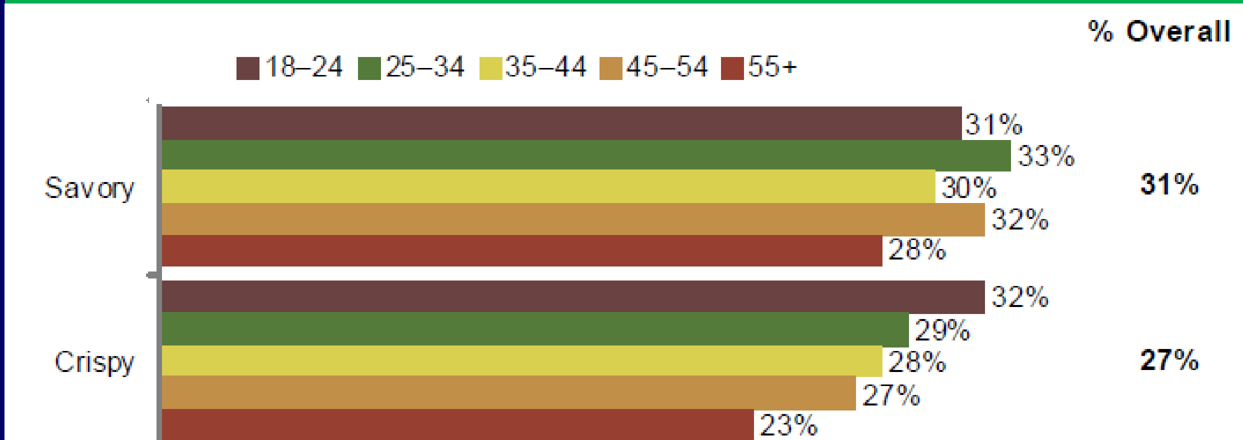
Top Growth Seafood Menu Entrees 2 Years[2]

Panko-crusted	**31%**
Taco	**19%**
Benedict	**17%**
Grits	**11%**
Tostada	**11%**
Crêpe	**9%**
Green Salad	**9%**
Bruschetta	**9%**
Lobster Salad	**8%**

1. NRA/ACF "What's Hot 2012?; 2. NRN/Datassential, 2012

Crispy Strong Menu Trend, Pecan Chips

How Likely are you to Order Menu Items Described: [1]

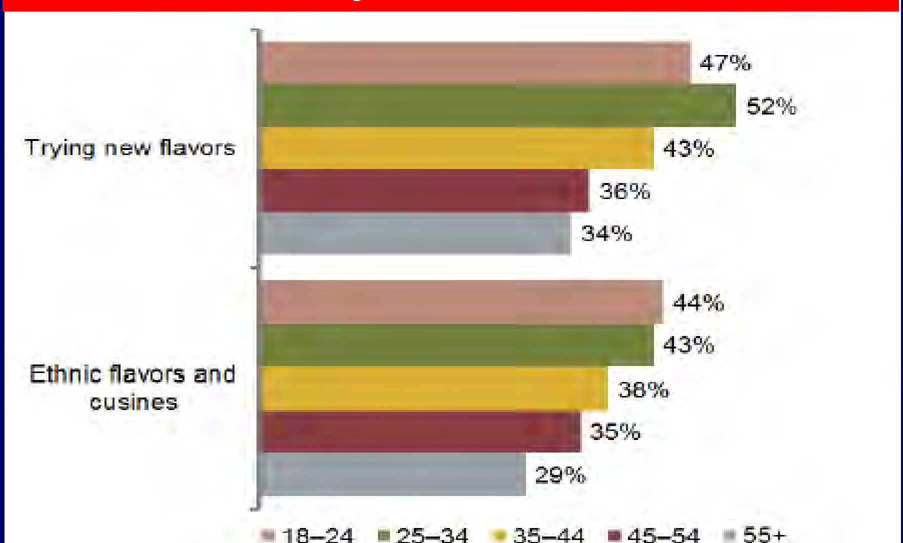


ACF Chefs - Hot Prep Methods 2012[3]

1. Pickling
2. Fermenting
3. Sous Vide
4. Liq. Nitro/chilling
5. Oil poaching
6. Smoking
7. Braising
8. Grilling
9. Roasting
10. Foam/froth/air

Hot '12

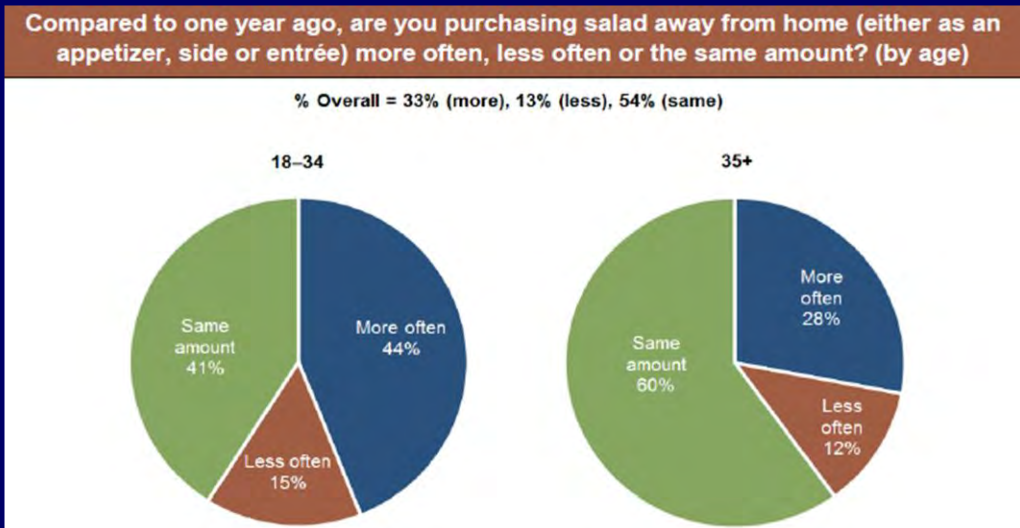
More Interested Try New Flavors/Cuisines 2 Yr[2]

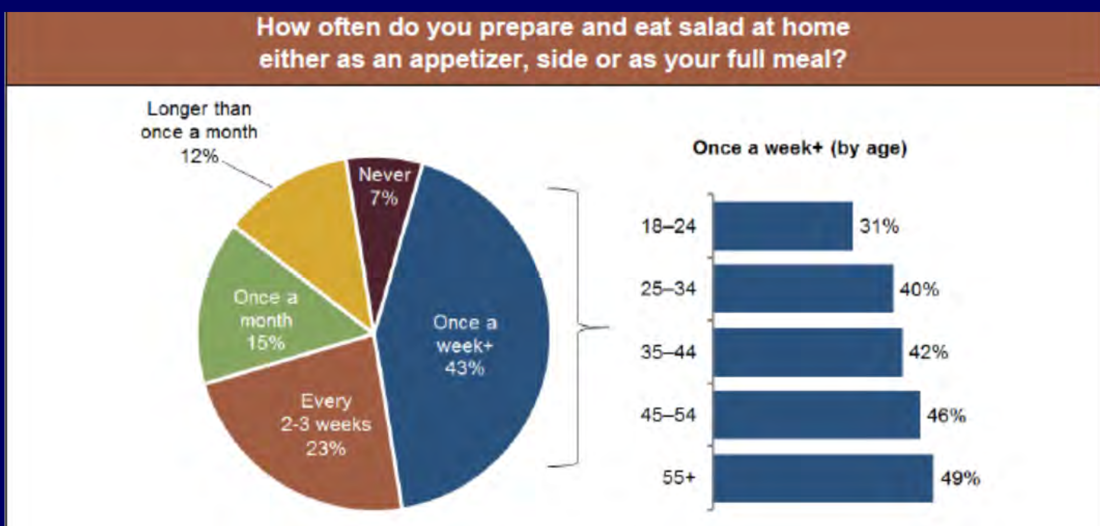


1.Technomic, Inc., 2011, The Consumer Flavor Trend Report,; 2. NRA, What's Hot, 10/2011

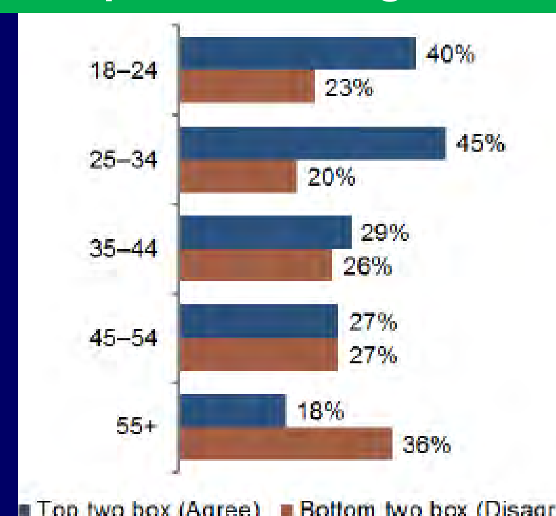
Salad Orders, Home Consumption Up

- 76% now order salad at least occasionally, up from 66% in 2009





More Likely to Order Salad Unique Flavors/Ingredients



Technomic, The Left Side of the Menu Soup & Salad 2012

Hot 2012 ACF Chefs

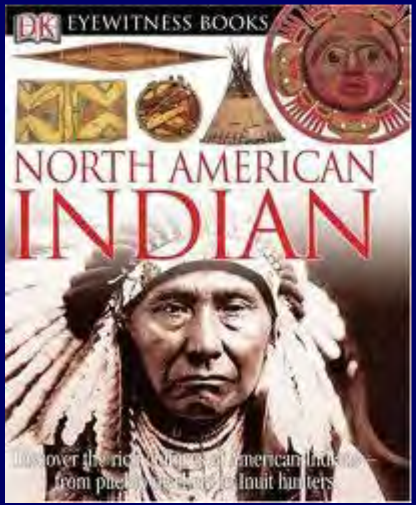
Hot '12

PRODUCE	
1	Locally grown produce
2	Organic produce
3	Superfruits (e.g. acai, goji berry, mangosteen)
4	Exotic fruits (e.g. rambutan, dragon fruit, paw paw, guava)
5	Heirloom apples
6	Heirloom beans
7	Specialty potatoes (e.g. purple, fingerling, baby Dutch yellow)
8	Micro-vegetables/micro-greens
9	Hybrid fruits/vegetables (e.g. plumcot, grapple, broccoflower)
10	Fresh herbs
11	Heirloom tomatoes
12	Dark/bitter greens (e.g. collards, kale, beet tops)

Heirloom Tomatoes

Chefs What's Hot

Varietals are Hot
500 Types of Pecans
Capture American Heritage



Minis, Ethnic, Euro Hot Dessert Trends

What's Hot Dessert

Hot '12

1	Artisan/house-made ice cream
2	Bite-size/mini-desserts
3	Savory desserts
4	Deconstructed classic desserts
5	Dessert flights/combos
6	Gelato/sorbet
7	Cupcakes
8	Fruit desserts (e.g. cobbler, crisp,
9	Lollipops
10	Granita

Mini-Cakes Super Hot Trend

Mini's & Pudding-like Treats

Mexican Paletas

Euro Desserts: Éclair, Mousse, Cannoli, Strudel

Ethnic Cookies

- Mexican Galletas
- Mexican Polvorones
- Parisian Macarons
- Asian Tea Cookies

Datassential/, 1/2012; IDDBA, What's in-Store?, Consumers in the Bakery, 2011

Ounce for Ounce a Nutrient Powerhouse

4 New Health Ops



Real Food Nutrition

Blending

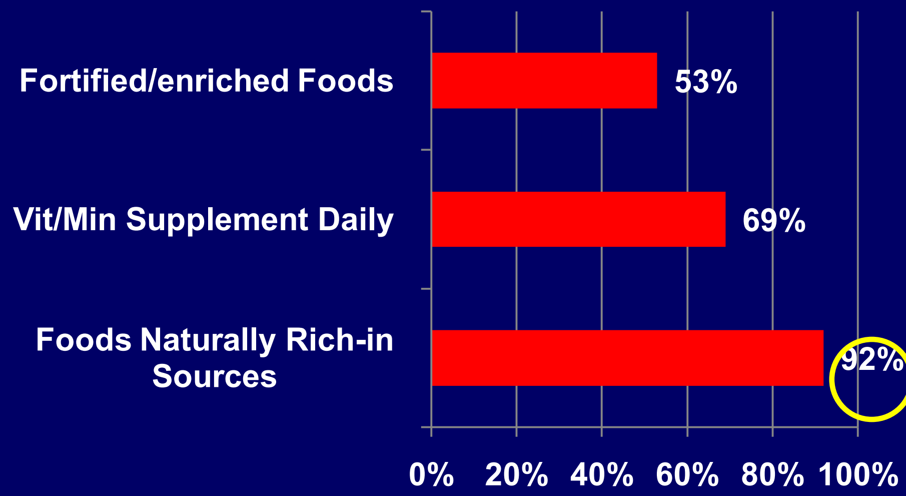
Inherent Nutrition

Stronger Food Labels

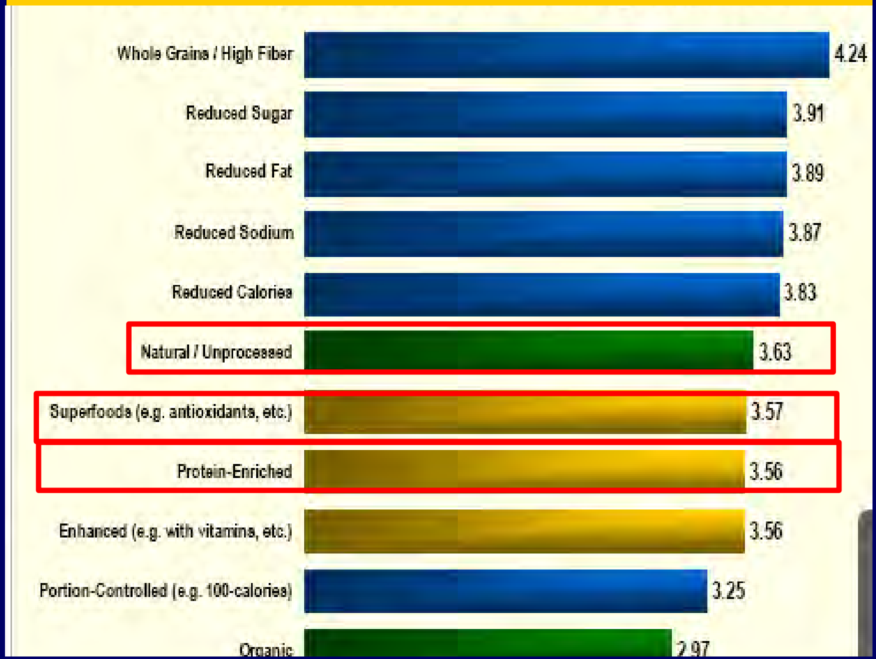
Natural Fortification Big Op Pecans 19 Vit/Min

Get Nutrients/Health Benefits Naturally Preferred Fortification/Supplements

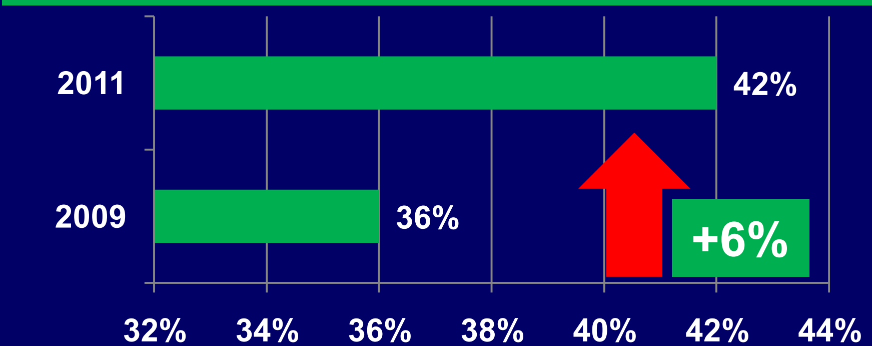
Importance of Nutrition Sources [1]



Attribute Imp. Maintain Good Health



Strong Effort Serve Foods Naturally Rich-in at Dinner [3]



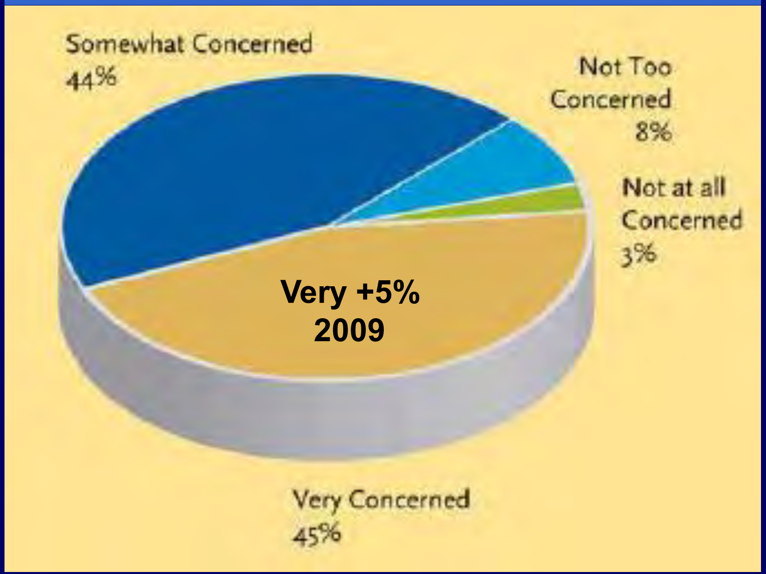
1. HealthFocus, 2010; 2. The Gallup Study of Nutrient Knowledge & Consumption; 3. 2011 Gallup Study of Dinner

Fortification Falls, Fortified Naturally Gains

Effort to Eat Fortified Foods[1]

	Strong Effort	Some Effort	No Effort
2006	24	57	19
2007	20	50	30
2008	20	49	31
2009	21	51	28
2010	19	46	35

Concern Nutrient Content Up[2]



32% Strong Effort to Eat More Foods Naturally "Rich-in" Nutrients

28% Naturally "Rich-in" Antioxidants
19% Fortified Foods[2]

Global New Product "Naturally Rich In" Claim[4] 2009-2011[4]

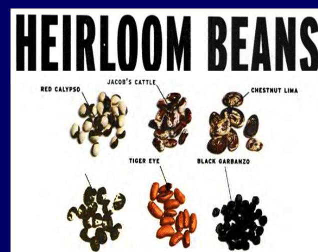
1. Gallup Study of Nutrient Knowledge & Consumption, „10; 2. FMI, U.S. Grocery Shopper Trends, 2011, 3. NMI, 2010; 4..Innova Market Insights, 2012

Super Fruits, Nuts, Spices, Pulses, Grains

Exotic Superfruit Flavors Fall in Beverages 2 Years
Acai - Top 5 2009 → 19th 2011
Pomegranate #1 2008-9 → 18th 2011
Black Tea > Green Tea; Mango +7, Coconut +8[1]

Bought Super Food Properties[2]

Cranberry juice	49%
Dark chocolate	48%
Almonds	47%
Green tea	43%
Sea salt	39%
Walnuts	35%
Dried fruit	34%
Pomegranate juice	25%
Black tea	24%
Greek yogurt	21%
Sorbet	15%
Dried plums	13%
Quinoa	9%
Tofu	8%
Acai juice	8%
Coconut water	5%



Antioxidant (ORAC) Value Comparisons[3]

1 tsp cloves

> ½ cup of blueberries

ACF Chefs Hot „12[4]

Superfruits:
Acai
Goji berry
Mangosteen
Purslane

Hot Exotics:
Rambutan
Dragon fruit
Paw paw
Guava

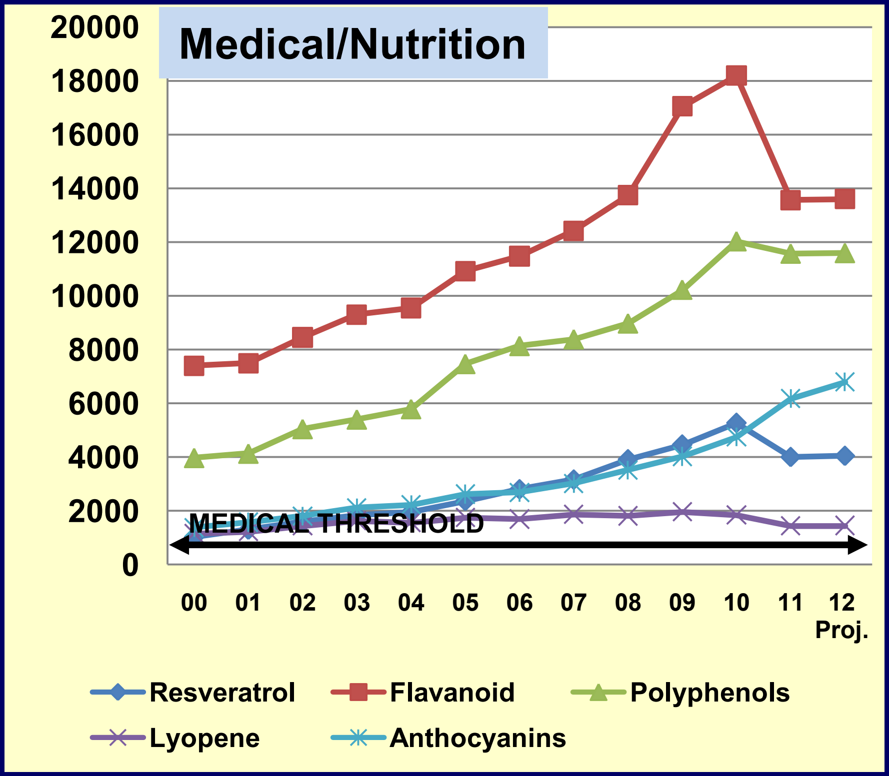
Hot '12

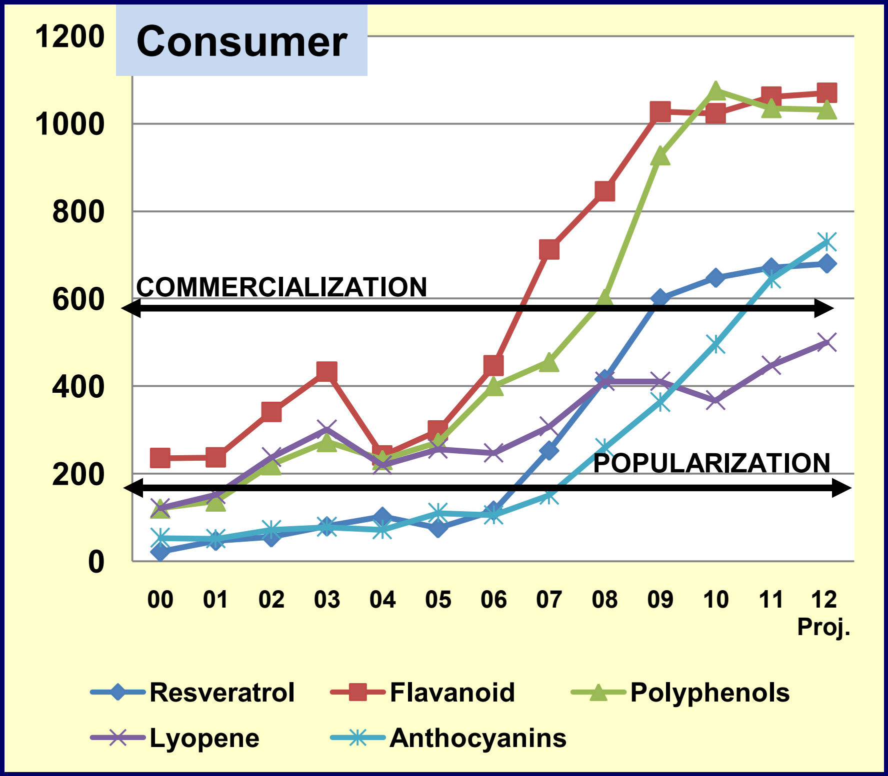
Hybrids Varietals

Pecans:
- Phenolics
- Pro-anthocyanins
- Flavonoids

1. Bev. Industry, New Product Development Survey, 2012; 2. FMI, Shopping for Health; 2011; 3. McCormick; 4. NRA, What's Hot 2012 ?

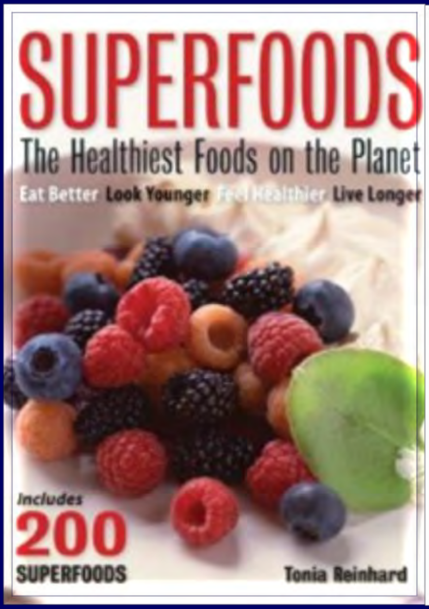
Phytochemicals Crossed into Mainstream in 2007, Polyphenols & Flavonoids Lead

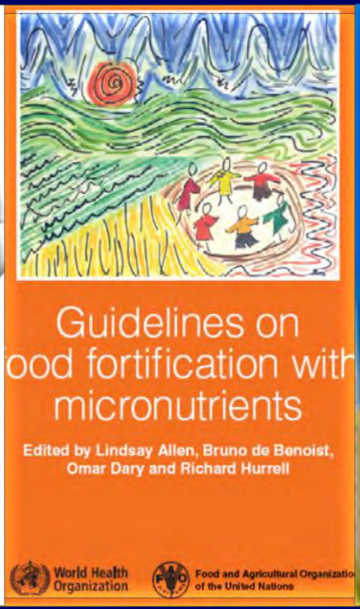




TrendSense™: Pecans have High Demand Phytochemicals
Polyphenols, Flavonoids Soar
Anthocyanins Just Becoming Mass Market Op

The New Nutrients





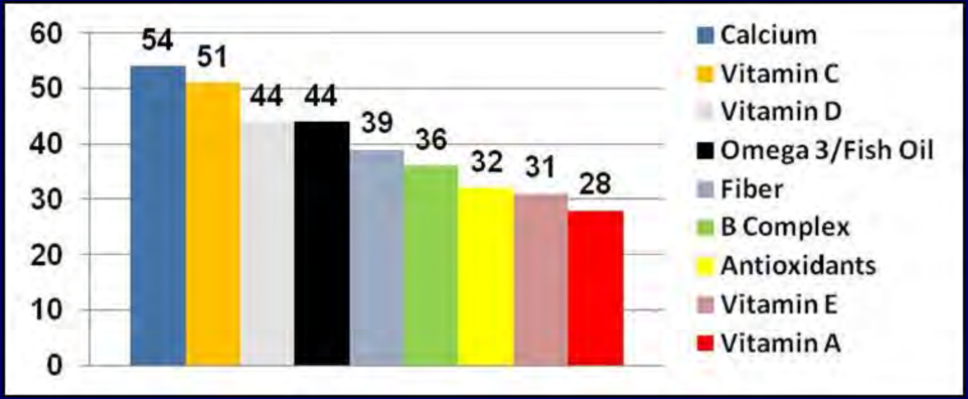
Pecans: Capturing New Life, Old Nutrients Naturally

Dramatically Higher Belief in Effectiveness of Nutrients to Deliver Serious End Benefits

- ✓ Believe Very Effective:[1]
  - ✓ 55% calcium - bone health
  - ✓ 38% omega - heart, 25% skin, 23% brain
  - ✓ 55% fiber - colon cancer

6 in 10 name at least 1 nutrient deficient in Calcium, omega-3, pre/probiotics, vitamin D

% Making Strong Effort To Consume More:[1]



Leading Supplements in 2011 % Users Who Take[2]	
Multivitamin	71%
Omega 3/Fish Oil	33%
Calcium	32%
Vitamin C	32%
Vitamin D	32%
B-Complex	25%
Vitamin E	19%
Glucosamine/Chon.	12%
Magnesium	12%
Iron	11%
Flax Seed Oil	10%
CoQ10	9%
Zinc	9%
Probiotics	8%

Omega > Ca, Vit B1, B2, Vit E, A, Antiox., Fiber, Mg, Zn, Plant Source Omegas[2]

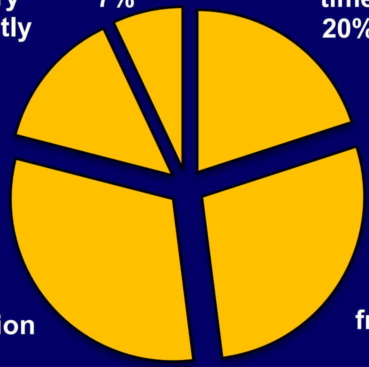
1. 2010 Gallup Study of Nutrient Knowledge & Consumption; 2. Council on Responsible Nutrition, Dietary Supplement Survey, 2011

Fiber Most Sought After Health Claim[1]
Food with Fiber Claim $4.2B, 2011[2]

Most Sought Health Claims Food Pkg. [1]	
Whole Grain	56%
High Fiber	47
Low Sodium	50
Low Fat	38
Absence of Trans Fats	40
Low Sugar	40
Low Calorie	34
No Preservatives	36
No Chemical Additives	34
Low/Lowers Cholesterol	31
Vitamin/Mineral Enriched	30
Reduces Risk of Heart Disease	32

Most Sought After Type Fiber[3]	All
Naturally occurring fiber:	
Food	62
Drink	10
Added fiber:	
Food	37
Drink	6
Supplements:	
Metamucil	11
Probiotics	9

Nutritional Benefits 59%Buy Food for Frequently/Occasionally

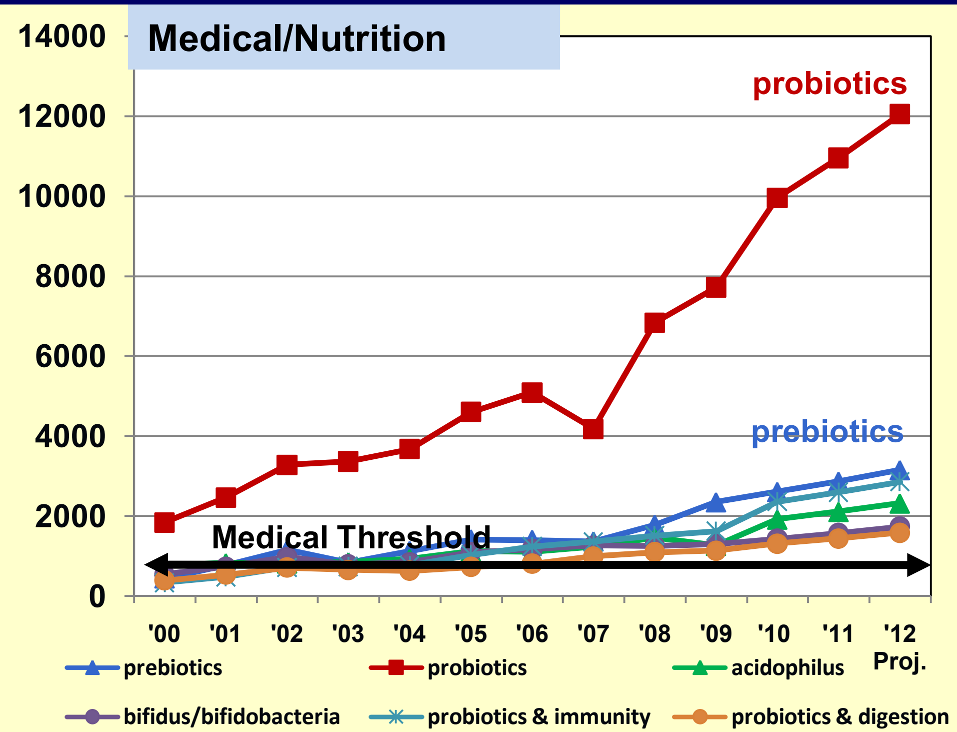


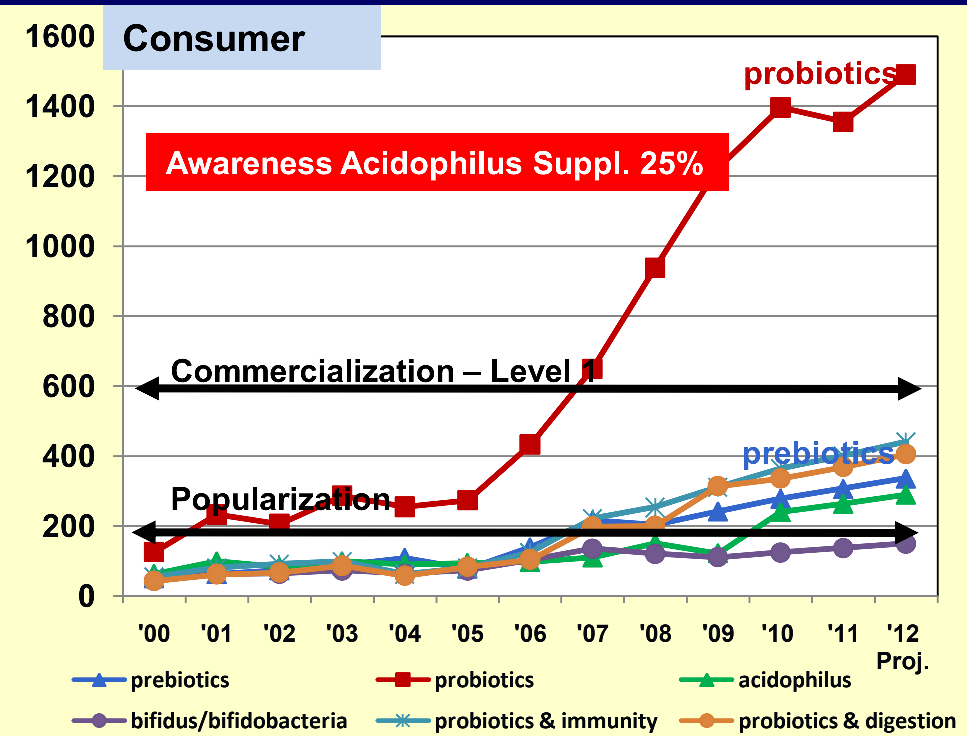
• Fiber	45%
• Vitamin/Minerals	43%
• Calcium	37%
• Antioxidants	36%
• Protein	34%
• Omega 3/Omegas	34%
• Probiotics	17%
• Superfruits	11%

Women, Elderly Constipation

1. Food Mktg. Institute, U.S. Grocery Shopper Trends, 2011; 2. Nielsen, 2012; 3. Pkg. Facts.

TrendSense™ Model: Prebiotics & Health Linkages





Prebiotics Emerging Op for Pecans

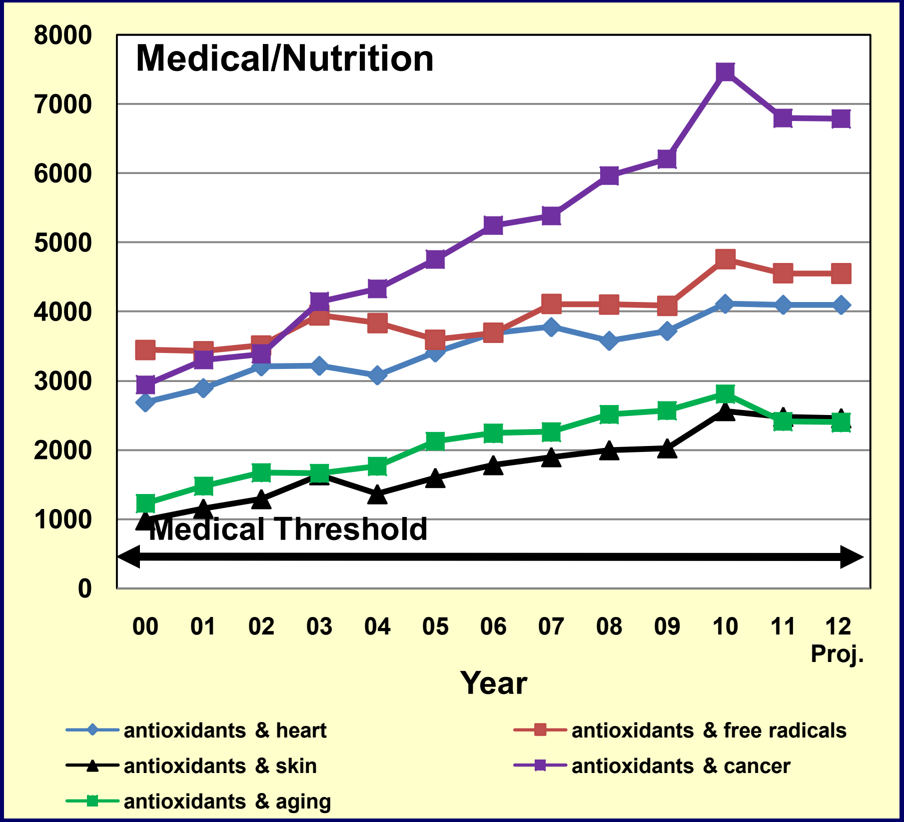
How important do you think fiber is in relation to..

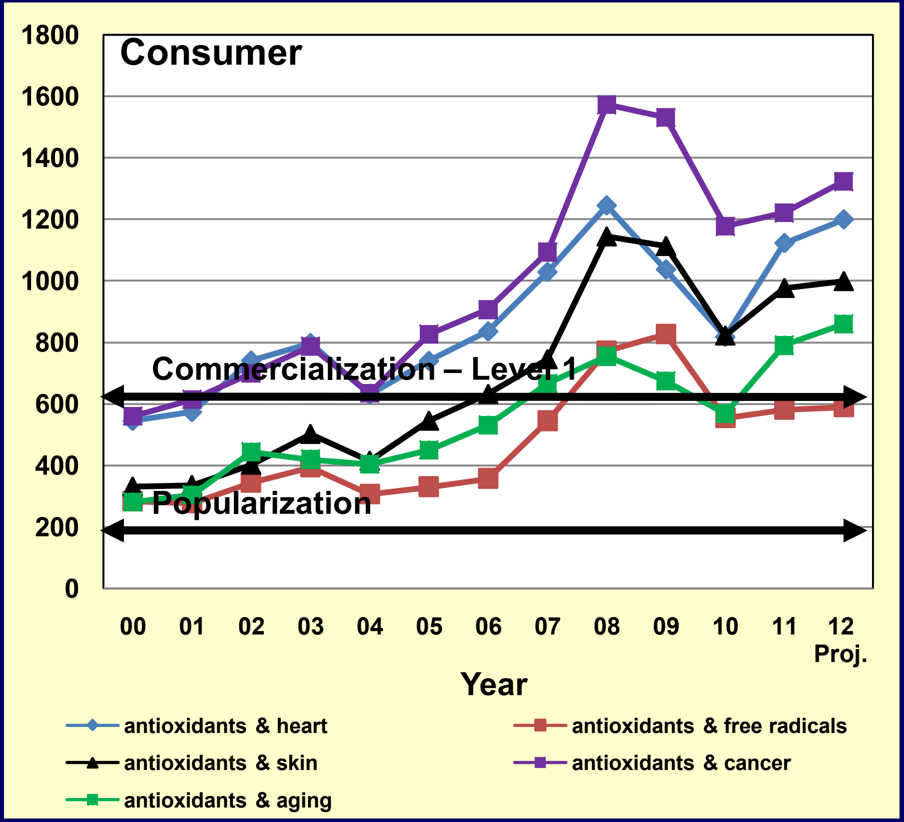
By %	All	18-24	25-34	35-44	45-54	55-64	65+
Maintaining reg. digestive track	65	60	61	61	69	70	71

8X More Likely To Associate Fiber With Digestive Health Than Probiotics
47% Look Fiber In Fx Food, 15% Fx Bev - *Op: Prebiotics & Super Fibers*

1. Sloan Trends, Inc., 2012; 2. Mintel , Attitudes Toward Fiber & Digestive Health, 2012; 3. Gallup, 2011 Study on Nutrient Knowledge & Composition

Antioxidant Linkage Starting to Rebound for Heart Health After Drop Due to AHA Negative Position





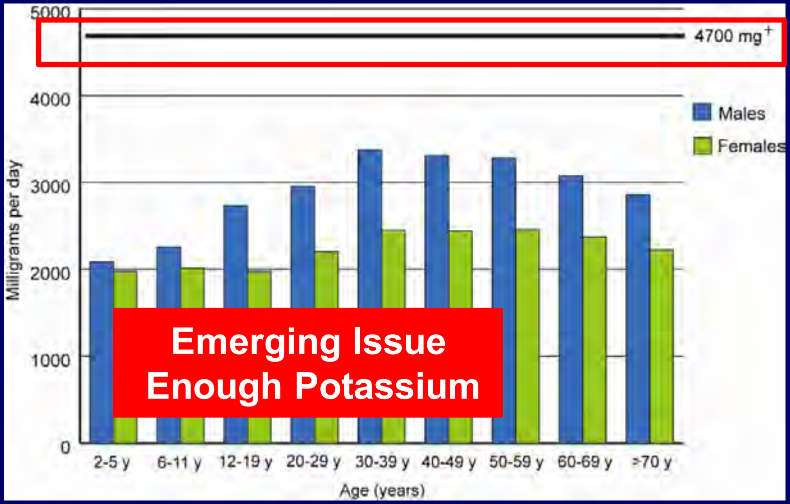
TrendSense™ Predictive Model: Antioxidants & Health Linkages

Choline, Potassium, Magnesium, Vitamin A

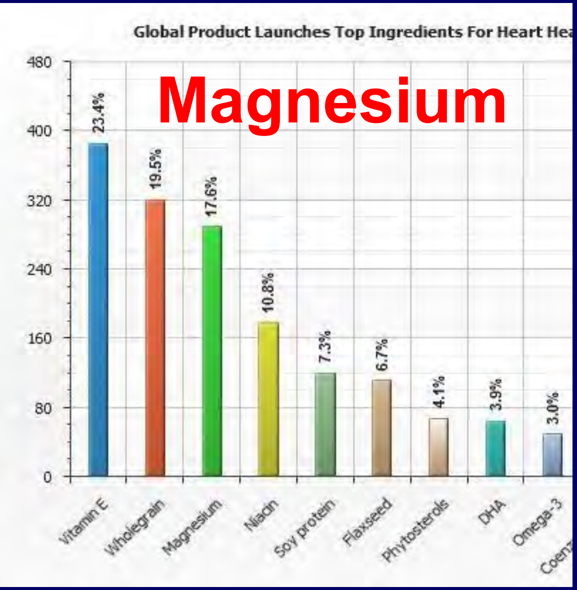
Magnesium Fastest Growing Mineral Supplement +25% 2011

New: Choline for Kids

Estimated Mean Daily Potassium intake, by Age/Sex 2005 - 2006[2]



Emerging Issue Enough Potassium



Magnesium

Vitamin A, Omega, Eyes

Mg #3 Global Heart New Products Fastest Growing Mineral Suppl.[3]

TOTAL DOLLAR SALES* $739.3 mil. (+2.6%)
DRUG STORES $375.4 mil. (+1.8%)

LEADING BRANDS**	Market share	Dollar sales (000)		Dollar sales % change
Centrum Silver	13.5%	$50,742	-	0.2%
Bausch & Lomb Preservision	6.9%	25,770	+	18.6%
Centrum	6.8%	25,451	-	7.8%
One A Day	6.6%	24,772	+	16.4%
Flintstones	4.7%	17,685	+	15.7%
Nature Made	4.1%	15,385	+	20.6%
Icaps	3.4%	12,662	+	7.2%
Bausch & Lomb Ocuvite	3.1%	11,547	-	0.4%
One A Day Men's Health Formula	2.6%	9,854	+	6.9%
Bausch & Lomb Ocuvite Preservision	2.1%	7,880	+	1.3%

Ref. #4

PreserVision 2nd Only to Centrum [5]

1. Nutrition Business J., 7/2011; 2. Report of the DGAC on the Dietary Guidelines for Americans, 2010; 3. Innova Market Insights, 2011; 4. Chain Drug Review, 1/12

Pecans: Very Diverse Mineral Content

Bioavailability

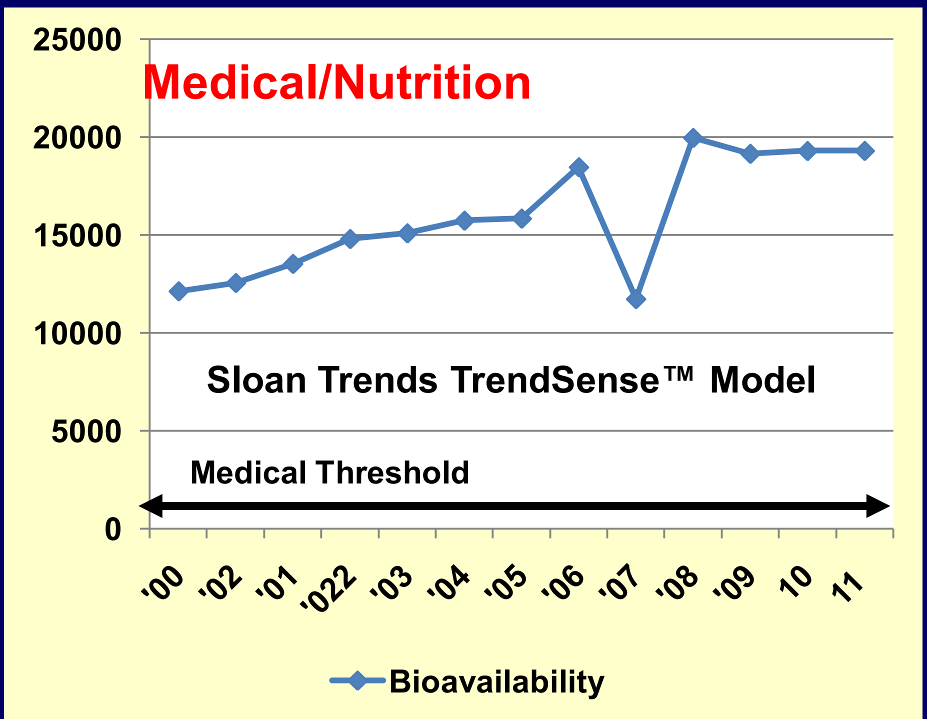
Asset to Naturally Enhancing Bioavailability

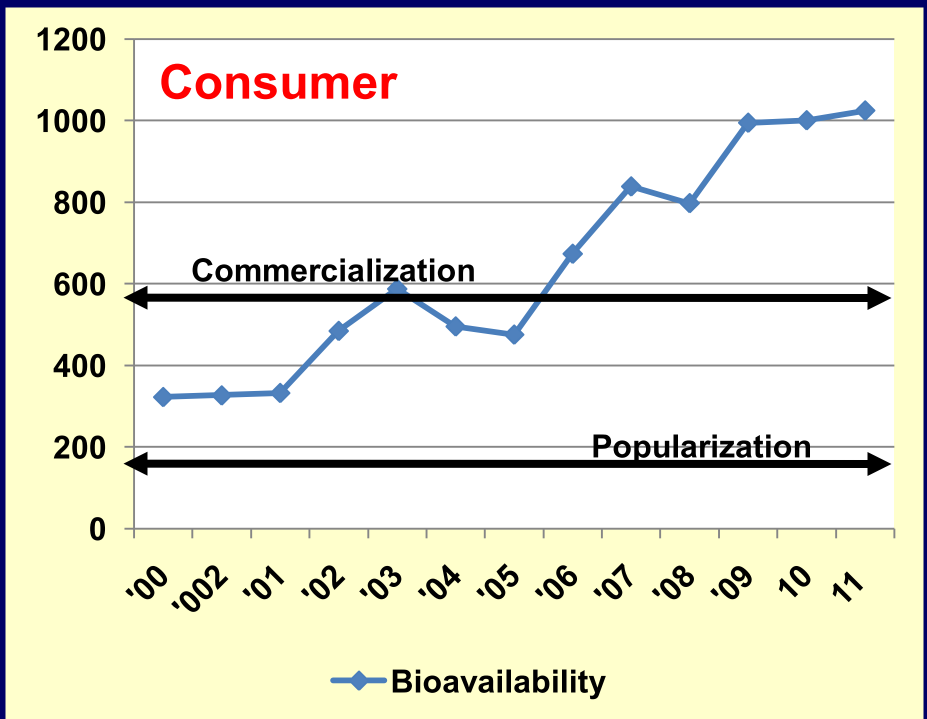
Drive Interest in Bioavailability[1]

- **Commercialization – mass market ready; full blown issue; time product launch**
- **Popularization – very health conscious, health food/specialty market ready; 1 ½-2 yrs to cross Phase; mass marketers should be developing products; issue strategies**
- **Emerging – just coming on radar screen; watch & wait**

55% want more clinical proof of the bioavailability of nutrients in fortified foods[2]

Sloan Trends TrendSense™ Model, Bioavailability Mass Market Op Start 2006

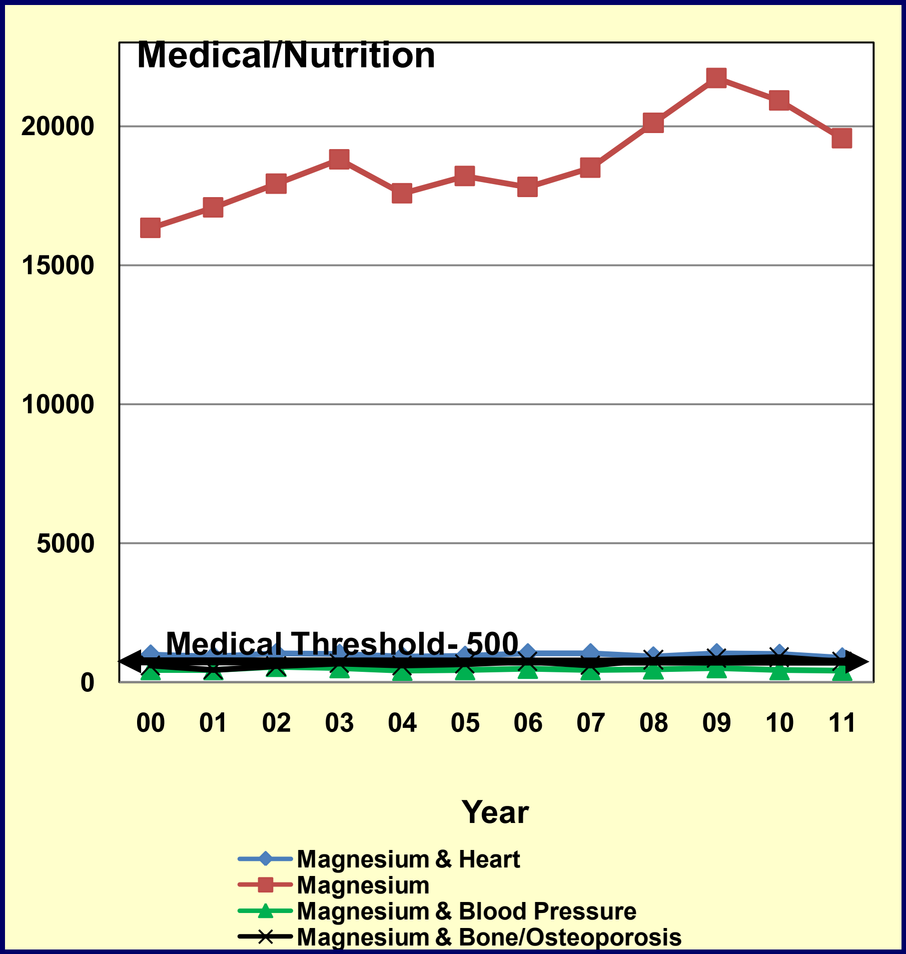


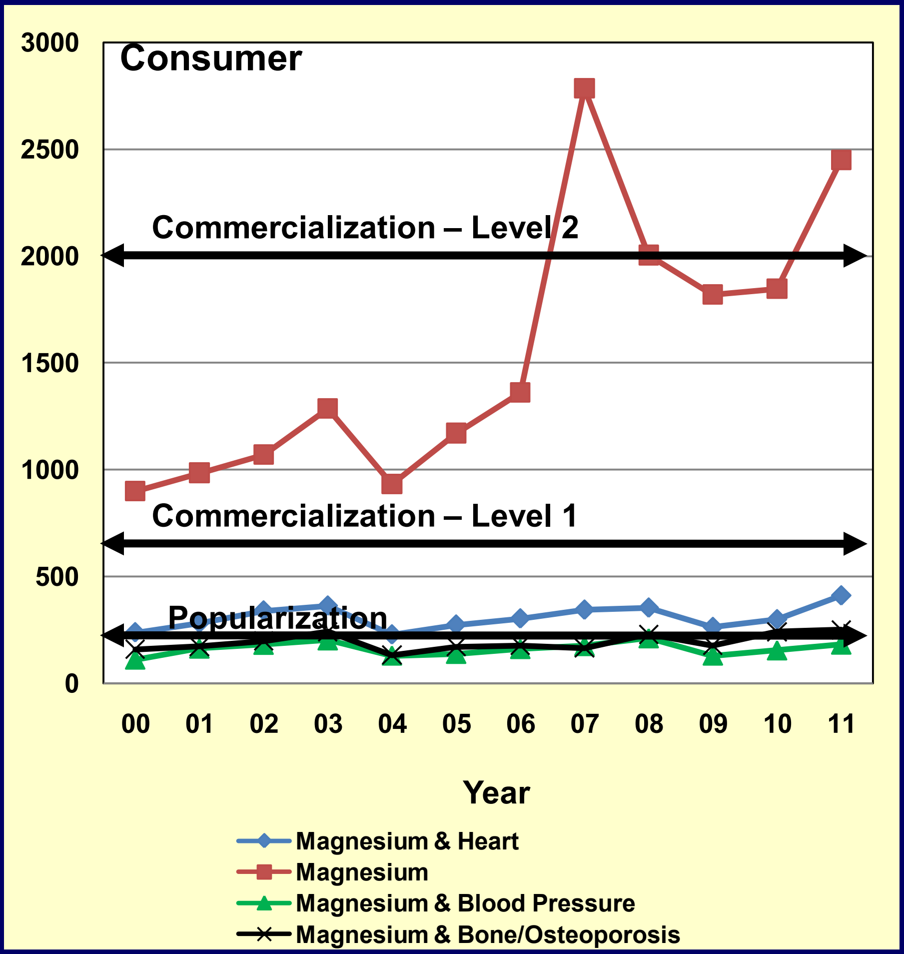


1. Sloan Trends, Inc., 2011; 2. Natural Marketing Institute, Steve French, Supply Side West , 2011; 3. Nutrition Business J. Survey, 6/2011

Interest in Magnesium Skyrockets

TrendSense™ Predictive Model: Magnesium, Heart & Blood Pressure





Pecans: An Asset to Bone Health Products, Mg Next Wave Bioavailability

Sloan Trends, 2011, Innova Market Insight, 2011; . SymphonyIRI,9/6/11 FDM

Pecans: A Good Source of Protein
Interest in Plant Protein Rising

The Power of Protein

Sarcopenia

Kids Growth/Development

Body Fat

Protein: High Appeal to All Ages[1]

Immunity | **Energy** | **Sport/Muscle: 68% Believe[1]**

Kids:
- Growth/Development
- Body Composition
- Kids Obesity
- 30% Moms ↑ Protein[3]

Matures:
- Frailty
- Loss Muscle Strength
- Sarcopenia #1 Issue National Institute On Aging
- Prevents Falls

PROTEIN[2]

Gen Y:
- #1 Fx Healthy Eating
- Body Image
- Reason Buy Bars
- Sports/Performance

Weight Management:
- Body Toning
- Satiety: 40% believe[1]
- Body Fat
- High Protein Diets
- Low GI Diets
- 37% believe works

Boomers:
- Body Toning
- Fountain of Youth
- Prevent Sports Injury

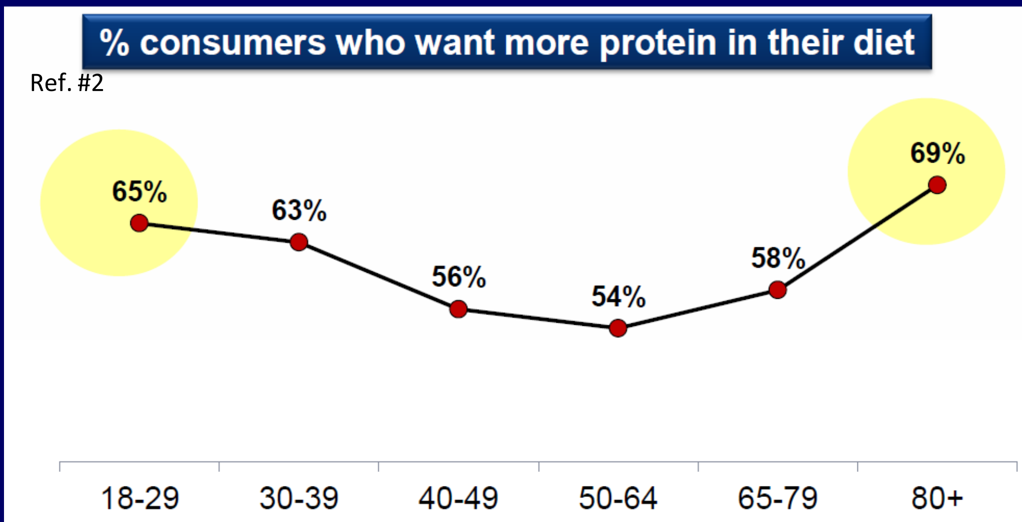
Heart Cholesterol

Blood Sugar Control

5th Most Imp. Component Healthy Eating After Frt/veg, Less Processed & Sat Fat

1. International Food Information Council, 2011; 2. Sloan Trends; 3. Gallup Study Nutrition, 2010

55% Making an Effort to Consumer More Protein, 39% a *Strong Effort* in 2011[1]



Most Imp. Component of Healthy Eating – Top 5 [4]	All %	18-24	25-34	35-44	45-54	55-64	65+
Eating a lot of veggies	64	57	59	61	67	71	68
Eating a lot of fruit	51	47	47	47	58	53	55
Limit processed foods	32	34	34	32	33	34	26
Low in saturated fat	22	20	21	24	21	22	24
Eating a lot of protein	22	38	25	20	21	11	17

69% General Population vs. 80% Dieters Protein Important to Losing Weight[1]

Consumers INCREASING ingredients in their diet due to specific needs[3]

2011 Importance On Food Label[4]	Very important
Trans fat	59%
Saturated fat	59
Fat content	56
Salt/sodium content	52
Calories	48
Whole grains	47
Chemical additives	47
Artificial sweeteners	47
High fructose corn syrup	44
Cholesterol	43
Sugar	42
Fiber	42
Vitamins/minerals	38
Protein	37
Preservatives	35
Carbohydrates	34
Serving size	29
Allergens	21
Gluten	15

1. The 2011 Gallup Study of Weight Management; 2. Natural Marketing Institute, 2012; 3. Hartman Group, 2010; 4. Mintel Healthy Eating & Weight, 2009; 4. FMI , U.S. Shopper Trends, 2011;

Believability/Awareness Protein High

% Adults Believe that:

Perceived benefits include:

- Helps build and maintain muscle 73%
- Helps increase lean muscle mass 68%
- Helps muscles recover more completely after exercise 68%
- Helps prevent muscle loss during aging 65%
- Helps give you energy throughout the day 64%
- Helps suppress your hunger between meals 59%

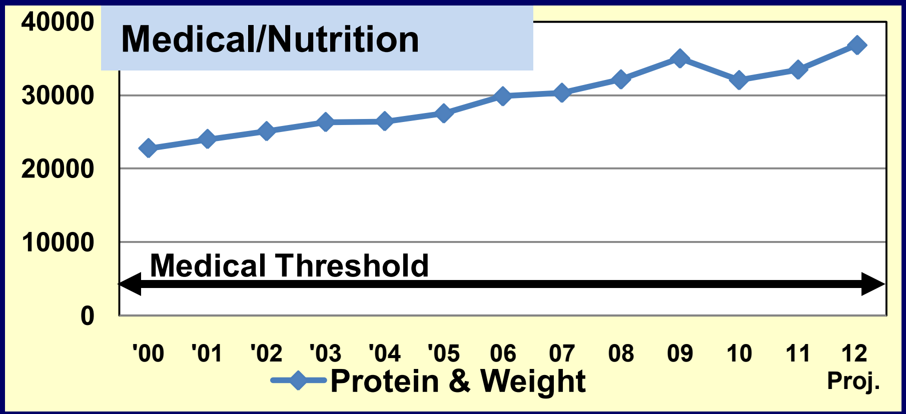
IFIC, Food & Health Survey, 2011; Dairy Management Inc. Survey, 2011

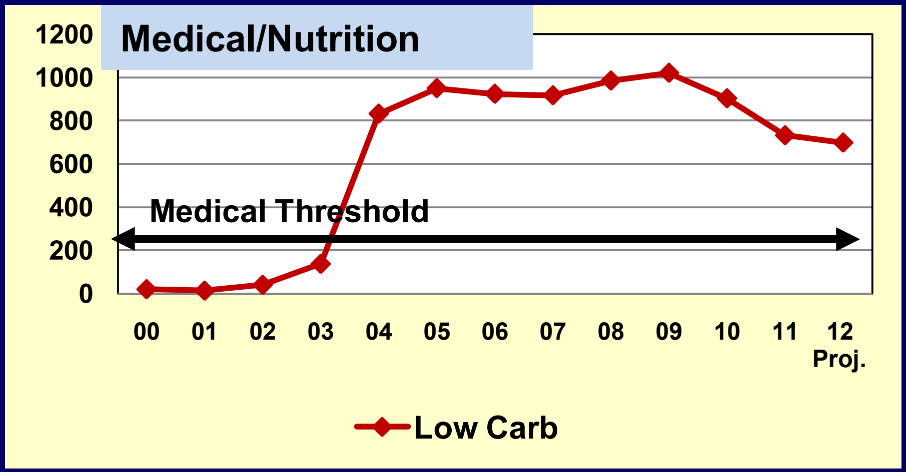
Pecans: Diverse Ops for Weight

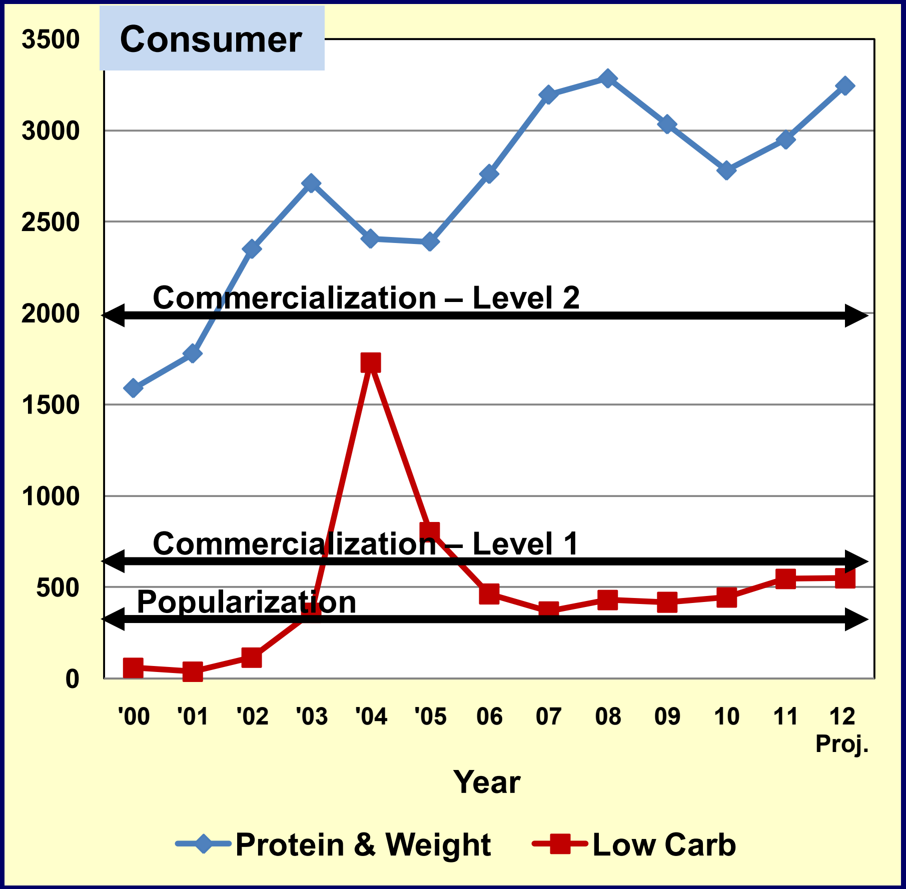
Weight, Body Toning, Satiety, High Protein



TrendSense™ Predictive Model Protein & Weight





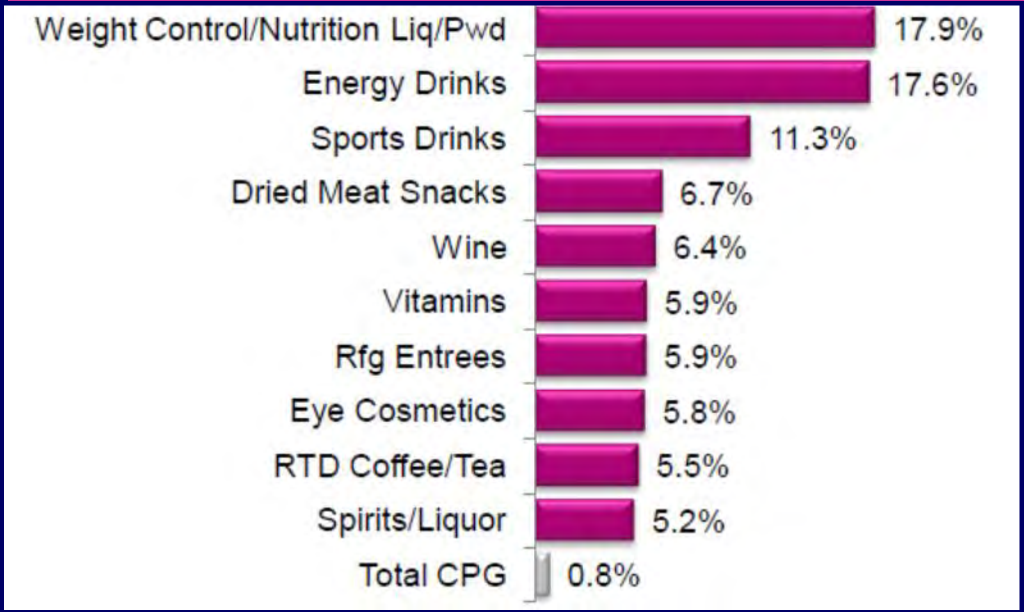


Weight #1 CPG Product 2011
Muscle New Market

Very/Extremely Concerned About

USA	
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%
Joint health problems	51%
Overweight/obesity for myself	46%

Top 10 Growth Categories CPG Unit Sales
% Chng. 2011 vs. 2010 (Ex. Wal-Mart)
Grocery, Drug, Mass & Convenience[2]

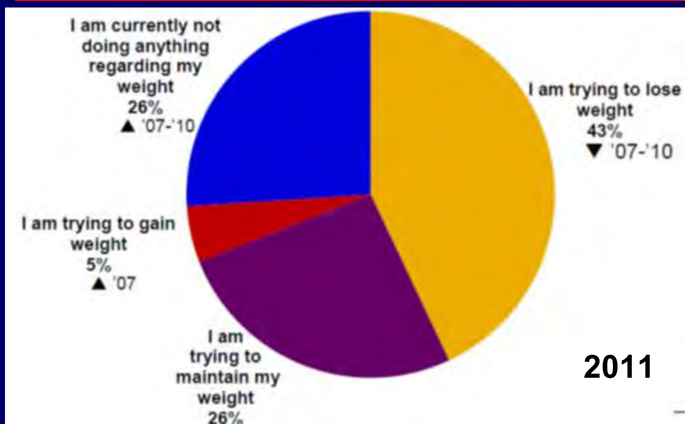


Top 10 Extremely / Very Concerned	18-29	30-39	40-49	50+
Muscle Health	50%	47%	58%	51%

1. HealthFocus International, 2011

Reduce Body Fat, New Weight Loss Focus, Loss of Muscle Starts Age 30

69% Try/Lose or Maintain[1]

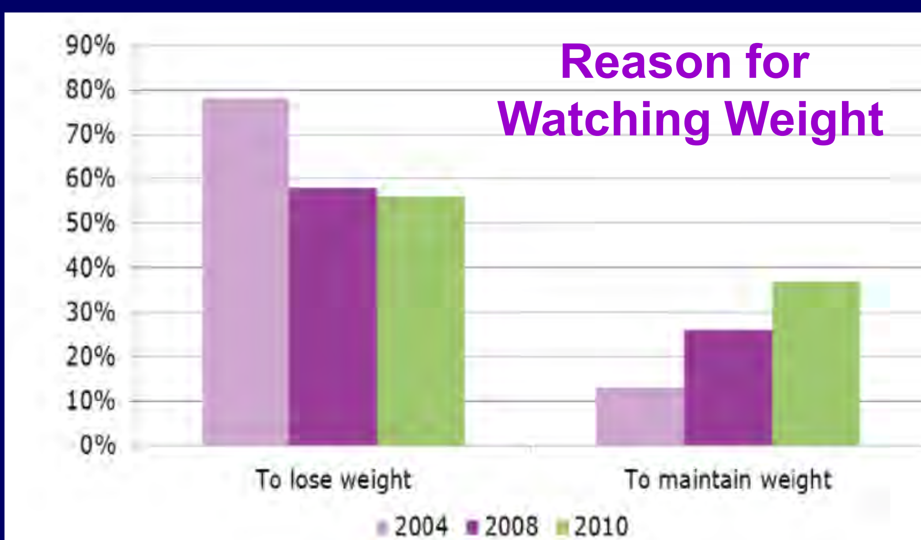


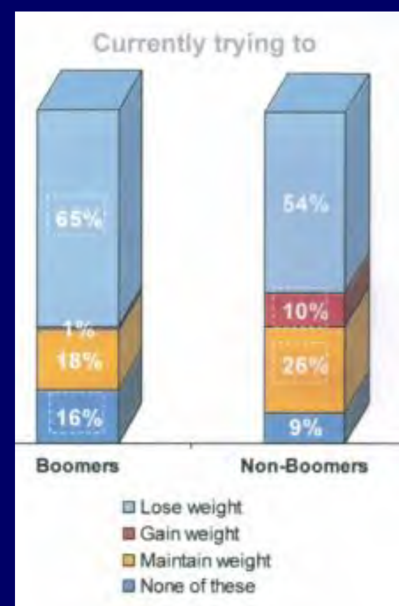
Consumers Believe Protein Can Provide Benefits

Perceived benefits include:

• Helps build and maintain muscle	73%
• Helps increase lean muscle mass	68%
• Helps muscles recover more completely after exercise	68%
• Helps prevent muscle loss during aging	65%
• Helps give you energy throughout the day	64%
• Helps suppress your hunger between meals	59%

Boomers Most Likely Try and Lose Weight[2]

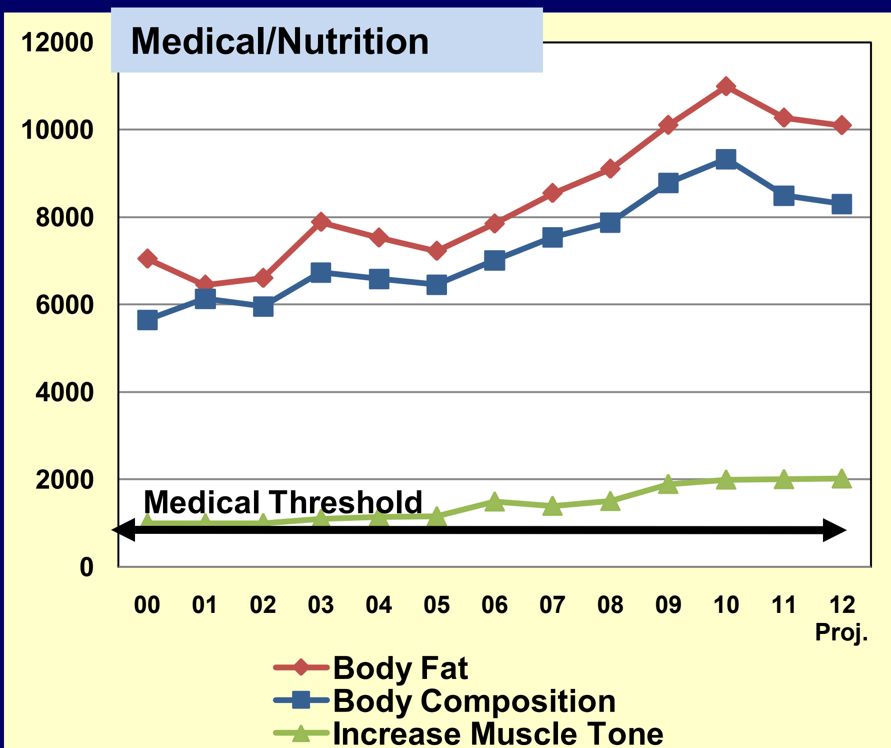


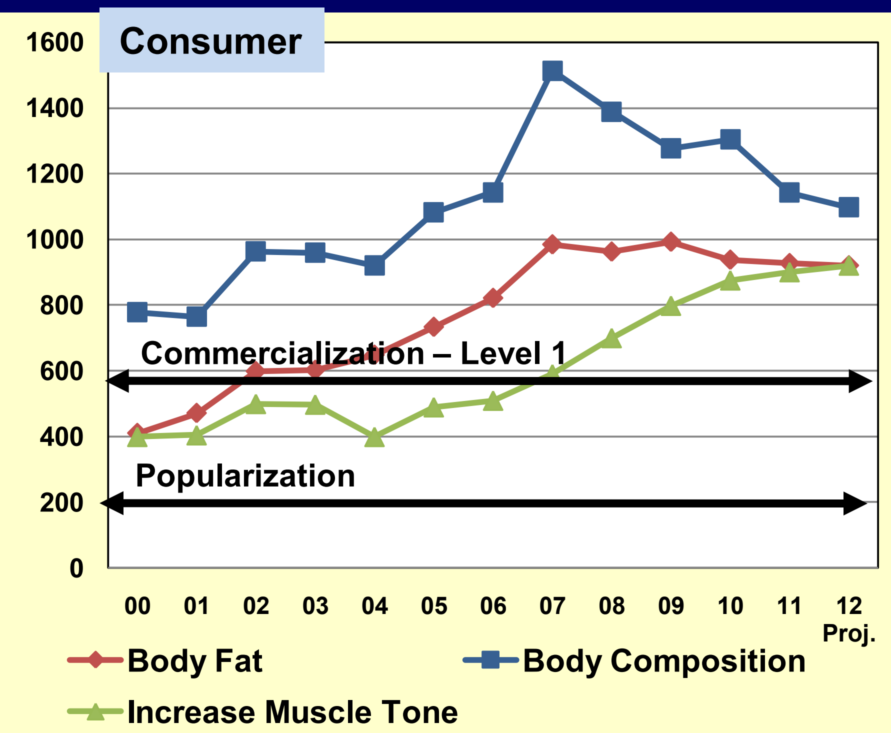


Weight/body image affects food purchase 68% Canada 67% U.S.[3]

1. IFIC, Food & Health Study, 2011; 2. RoperASW, 2010; 3. HealthFocus, 2011; 4. Dairy Management Inc., 2011

TrendSense™ Weight Loss, Body Fat, and Body Composition



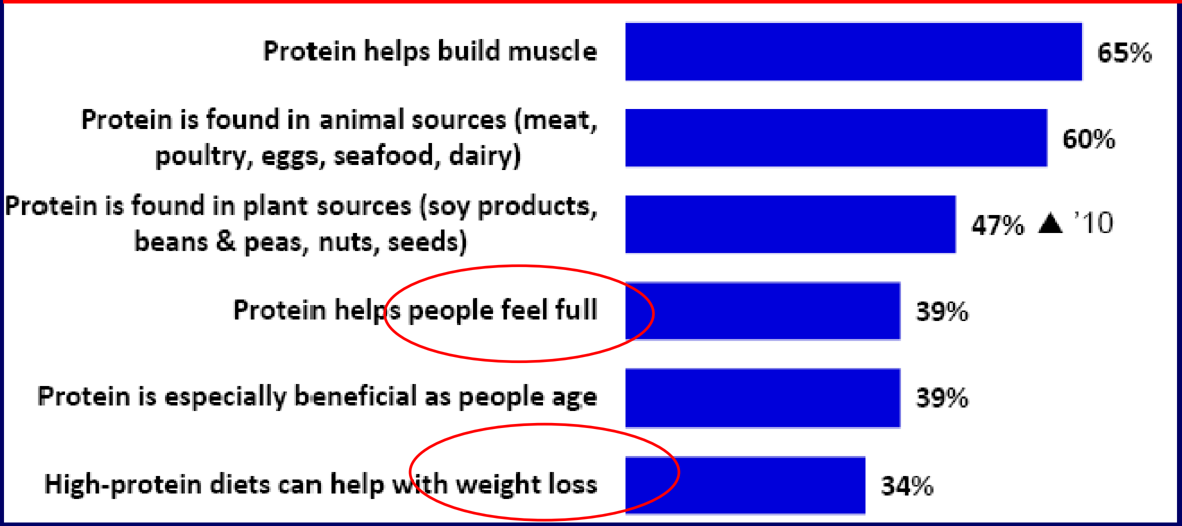


Sloan Trends TrendSense™, 2011

53% Want Foods Help Control Weight/Satiety

Desired Functional Benefit	%
Body weight	64
Enhance metabolism	54
Weight through satiety	53
Blood sugar levels	53

Beliefs for Protein 2011:[1]



Weight Loss Most Desired Functional Food Attribute

Protein & Fiber, Top Satiating Ingredients, Low GI Gaining for Wt.

Age 55-64: Top Nutrients Lost Dieting Vit C, Bs, Protein, Minerals

Consumption of Foods for Specific Benefits	Taking	Interest
Heart Health	40%	50%
Physical Energy/Stamina	38%	53%
Digestive Health	37%	49%
Mental Performance	29%	58%
Immune System	31%	56%
Satiety	35%	50%
Appearance (Skin, Hair)	25%	57%

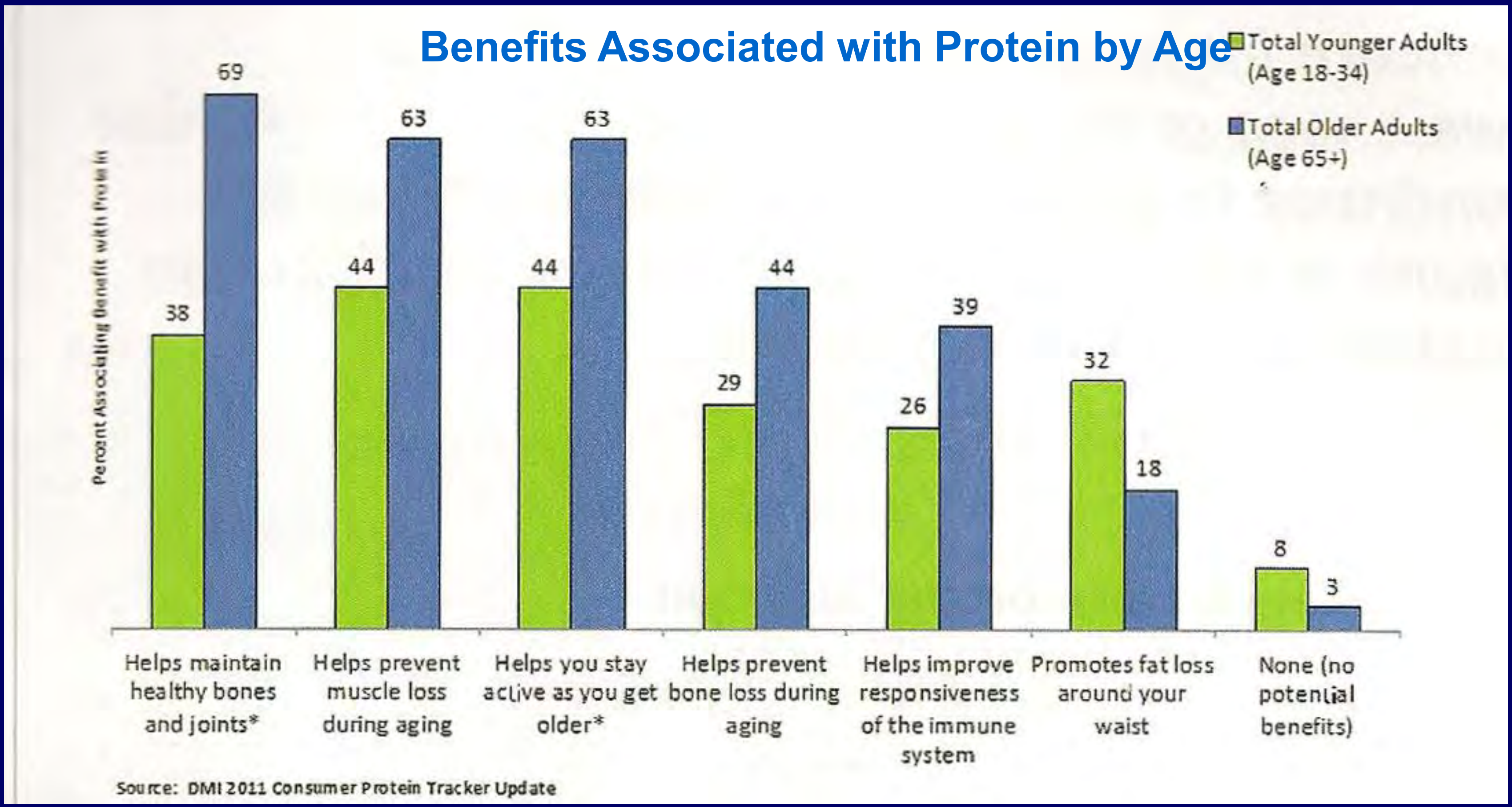
1. 2010 Gallup Study of Satiety; 2, Pkg. Facts, Weight Control in the U.S., 2010; 3. Mintel, Fx Food ‚09

Protein, Minerals & the Elderly

Muscle Strength, Bone Health
Sarcopenia



Protein Believes: Muscle, Joints, Bones, Muscle Loss with Age
Younger: Appearance, Performance

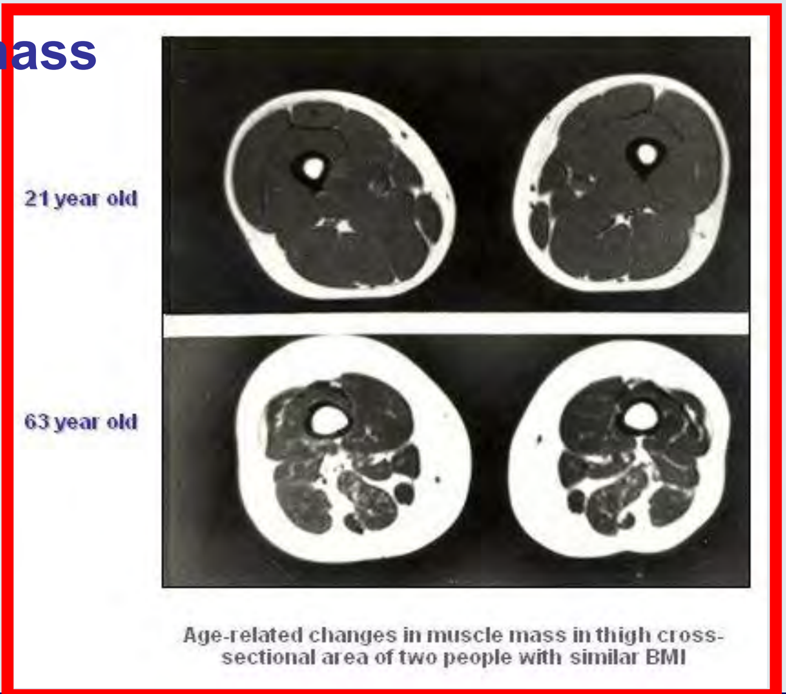


U.S. Export Dairy Council, 2012

Seniors & Sarcopenia: Mega Market Potential

- **Sarcopenia: age-related loss of loss of lean body mass, strength & function**
  - US: 45% of 65+
  - Japan: 20 M sarcopenia patients
  - China: 12% men, 8% women 70+
- Onset age 40, profound repercussions ~ 75
- 20's: muscle up to 60% fat-free mass
- 70's muscle < 40%
  - Loss: 1 - 2% / yr > 50+
  - ~50% or more by age 60

Dynapenia:
New proposed term for loss of strength



Age-related changes in muscle mass in thigh cross-sectional area of two people with similar BMI

Janssen I, Shepard DS, Katzmarzyk PT and Roubenoff R. The cost of sarcopenia in the United States. J American Geriatrics Society 52;1:80-85, 2004.

Pecans: Sleeper Markets for High Protein

Immunity and Energy



85% Look for Products Boost Immunity Strong "Sleeper" Association with Protein[1]

49% of Food Shoppers Very/Ext. Interested Immunity

18-29 yr 56%

30-39 yr 45%

40-49 yr 46%

50- 64 yr 47%

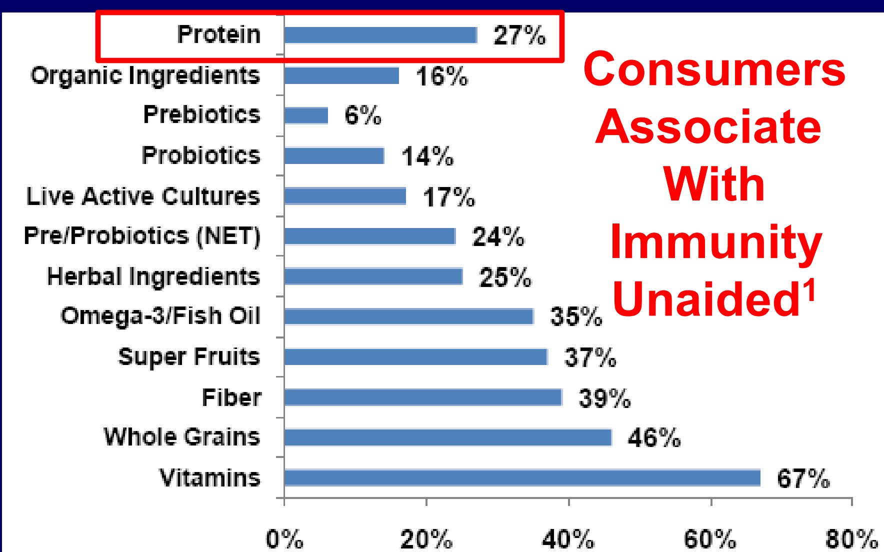
65 yr + 45%

2 out of 5 consumers…

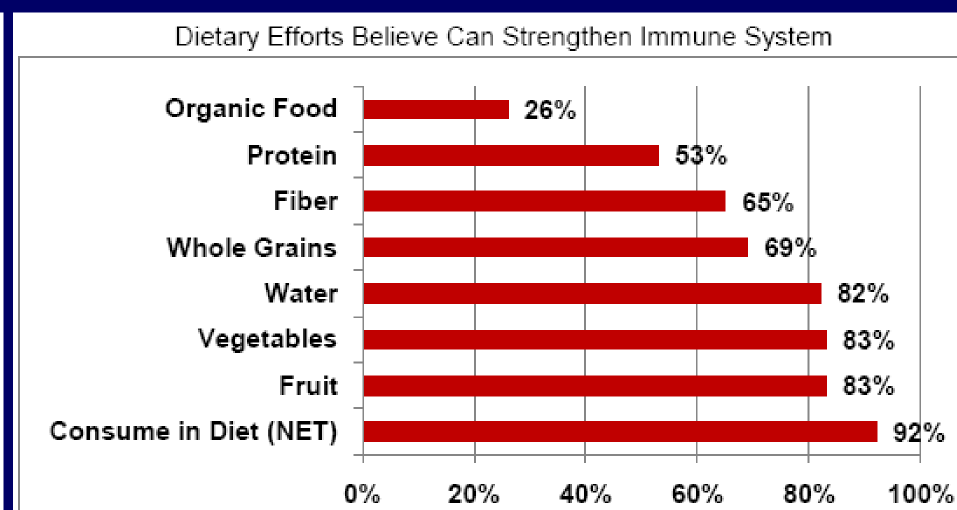
✓ use immunity-boosting foods

✓ seek foods/beverages that improve their body's natural defenses

25% of Health Professionals Recommend Eat More Protein to Boost Immunity

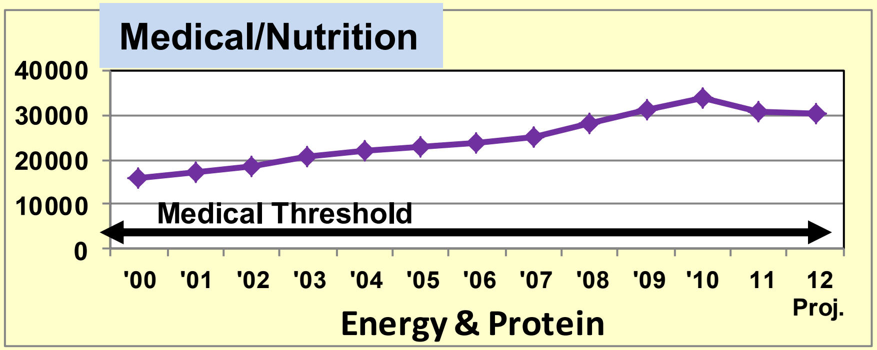


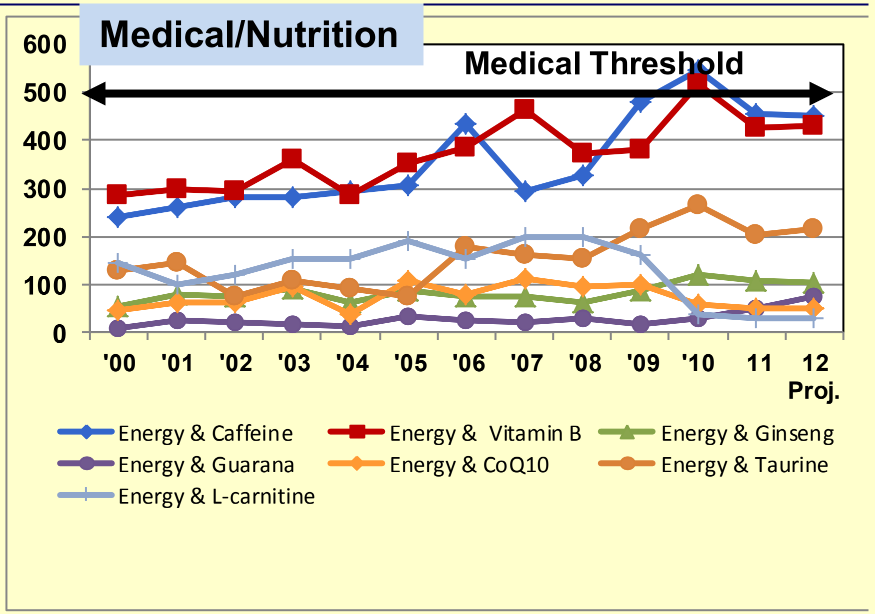
Consumers Associate With Immunity Unaided[1]

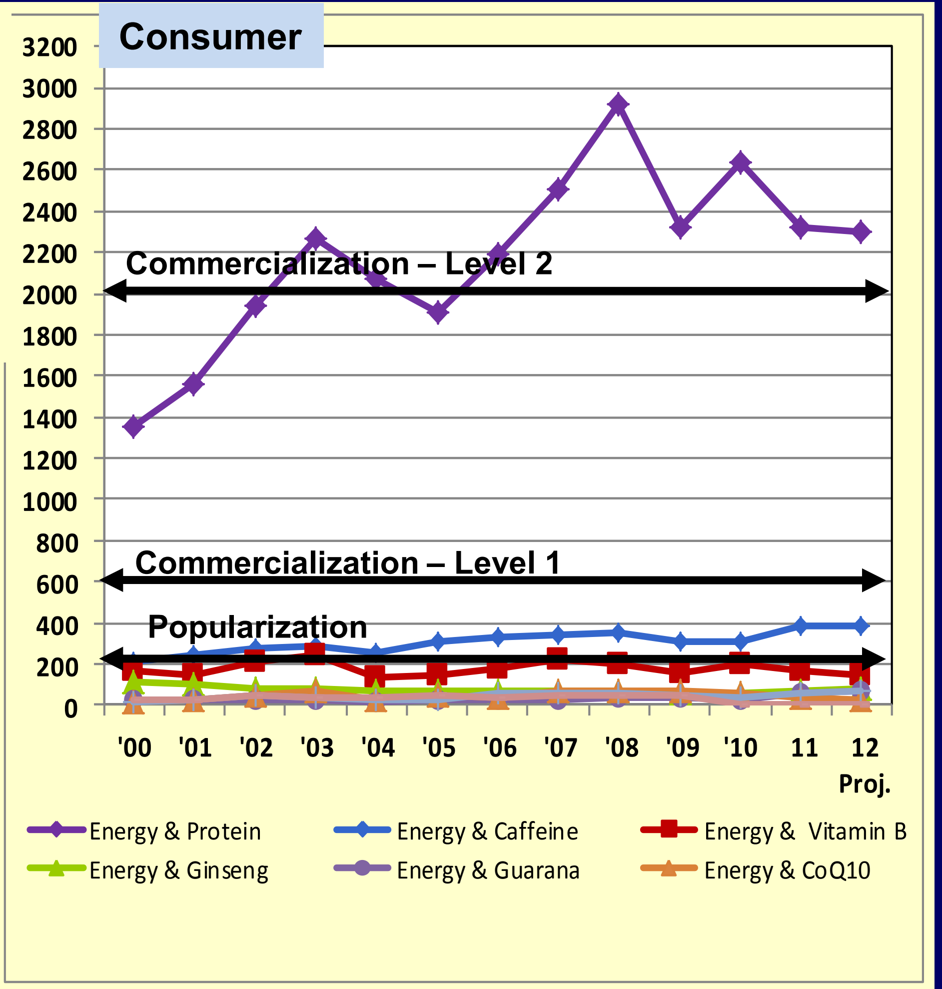


HealthFocus, 2011; 2. Gallup Study of Immunity, 2010

Energy More Associated with Protein Vs. Caffeine, Marketable, B-vitamins







Pecans Major Contribution Healthy Fats

The Good Fats



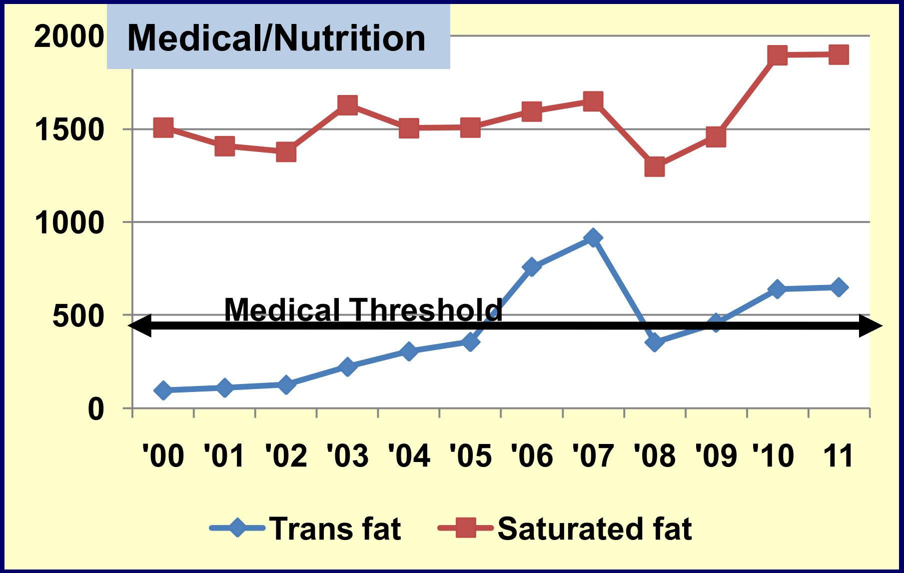
Saturated Fat Top

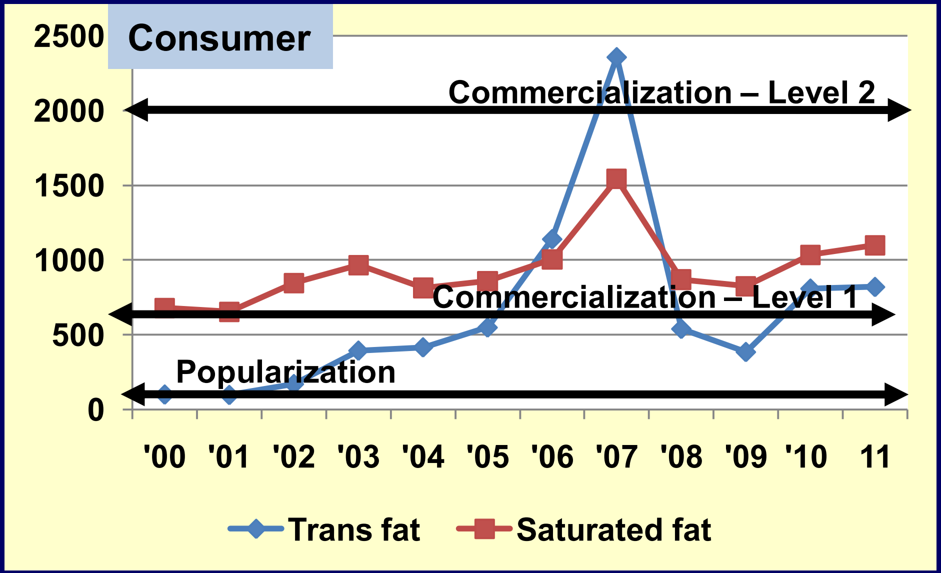
Important Buying Food	Very important 2010	Very important 2011
1. Saturated fat	55%	59%
2. Trans fat	55%	58%
3. Total fat content	54%	56%
4. Salt/sodium content	46%	52%
5. Calories	48%	48%
6. Whole grains	47%	47%
7. Chemical additives	44%	47%
8. Artificial sweeteners	NEW in 2011	47%
9. High fructose corn syrup (HFCS)	NEW in 2011	44%
10. Cholesterol	44%	43%

Check Ingredient List [2]

Type of fat/oil	62%
Sweeteners	59%
Natural ingredients	54%
Order of ingredients on list	47%

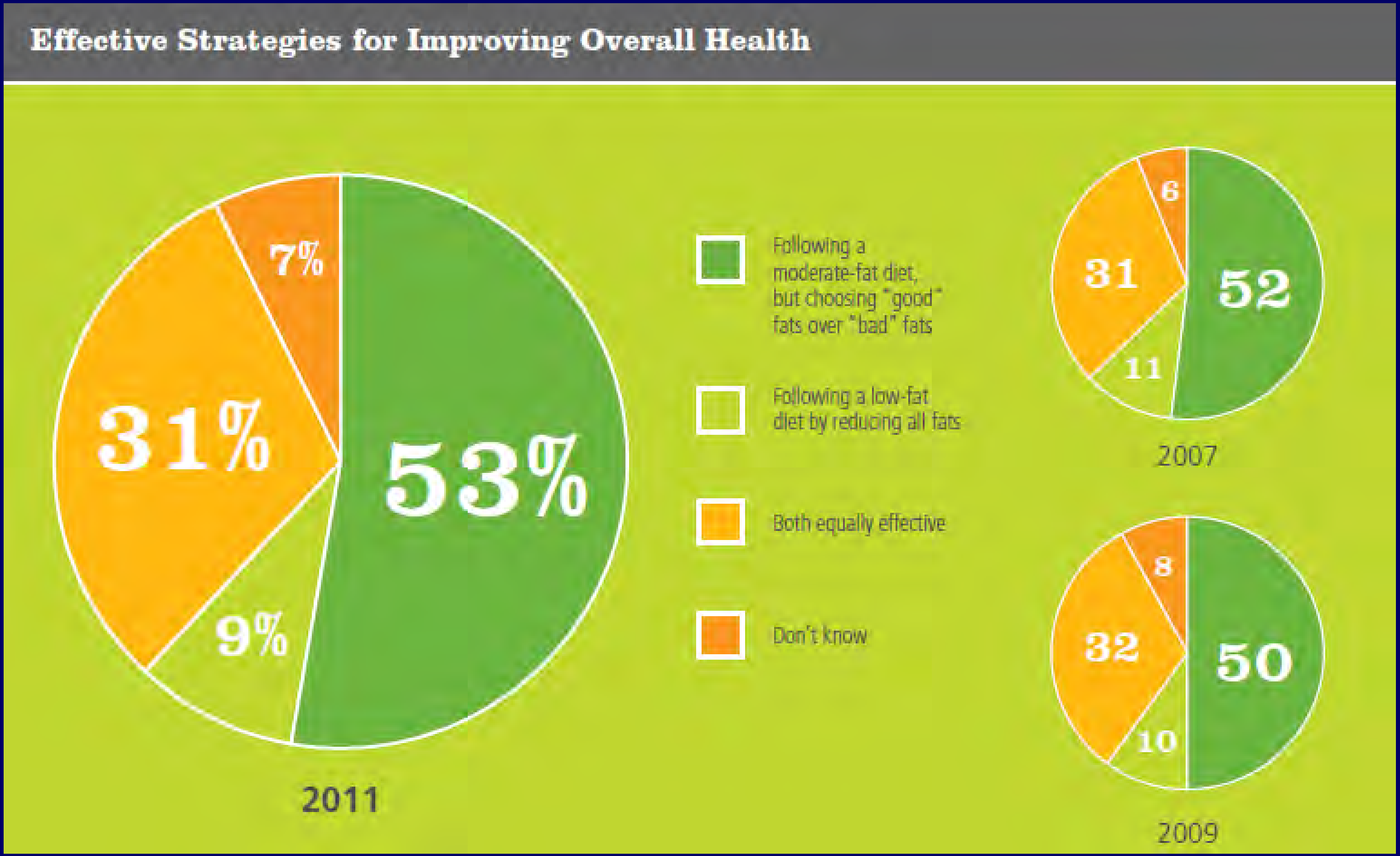
Low in Health Claim	$ Sales B „11
All Fat Claims	$46.1





1. FMI US Shopper Trends, 2011; 2. IFIC, Food & Health Survey, 2011; 3. The Hartman Group, Re-imagining Health & Nutrition, 2010; 4. SloanTrends

Following a Moderate Fat Diet & Including Good Fats Practiced by Half of Consumers



But Not Growing VS. 2007

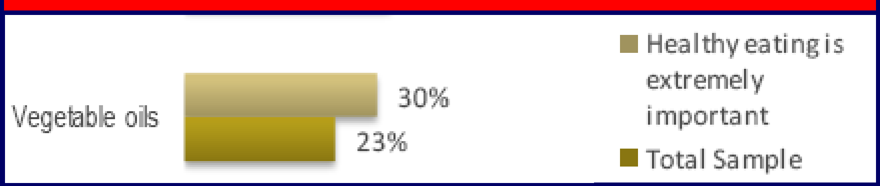
Consumer Attitudes About Nutrition, United Soybean Board, 2011

Now Looking to Get More Good Fats

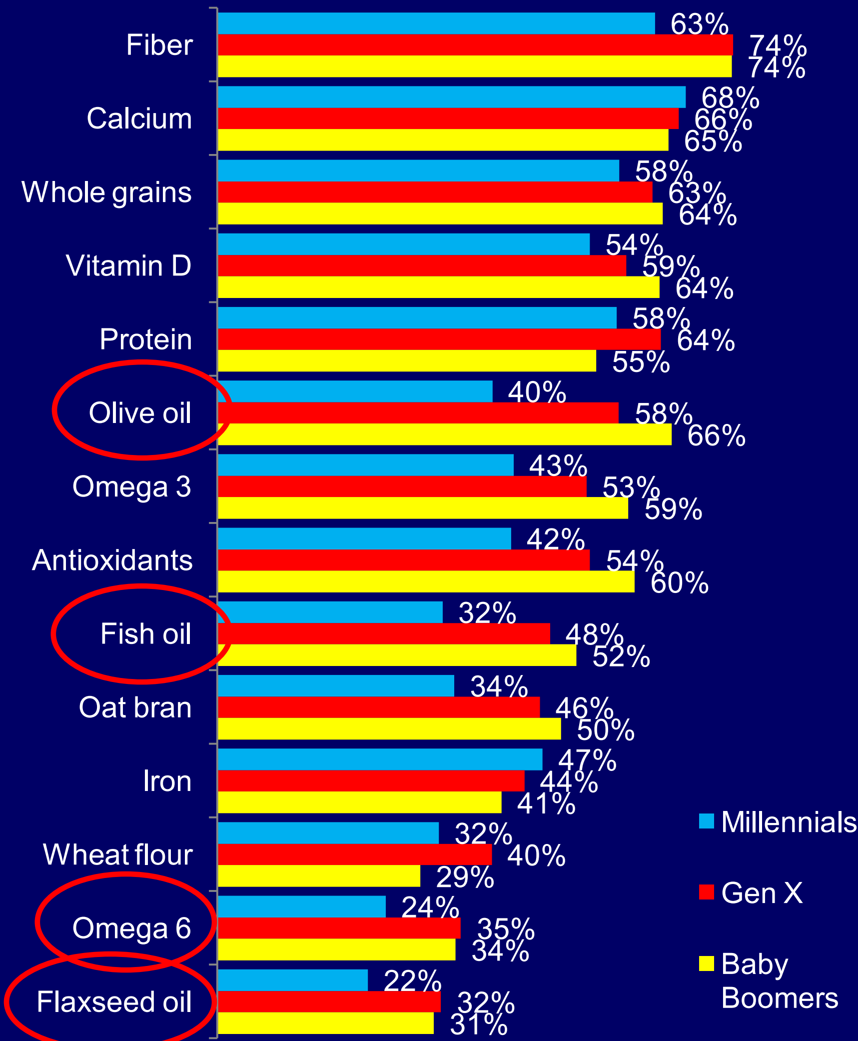
Is the ingredient good (something you try to get more of) or bad (something you try to avoid) when it comes to eating healthy?	Millennials	Gen X	Baby Boomers
Vegetable Oils			
Don't know/ Unfamiliar	4%	7%	6%
Bad	28%	25%	21%
Neither good nor bad	44%	46%	50%
Good	23%	22%	22%

Leading Supplements in 2011 % Users Who Take[2]	
Multivitamin	**71%**
Omega 3/Fish Oil	**33%**
Flax Seed Oil	**10%**

Strong Effort Include More:

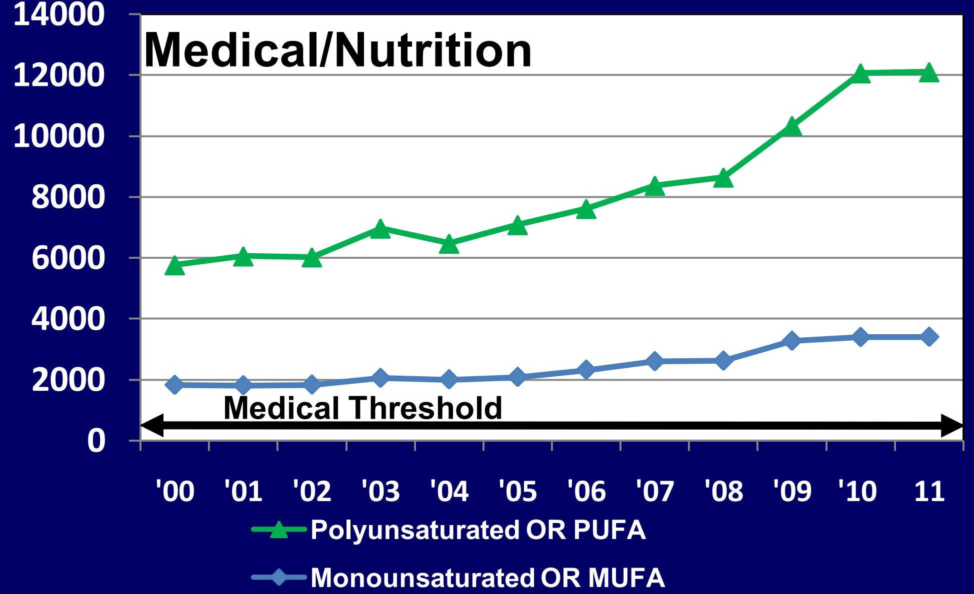


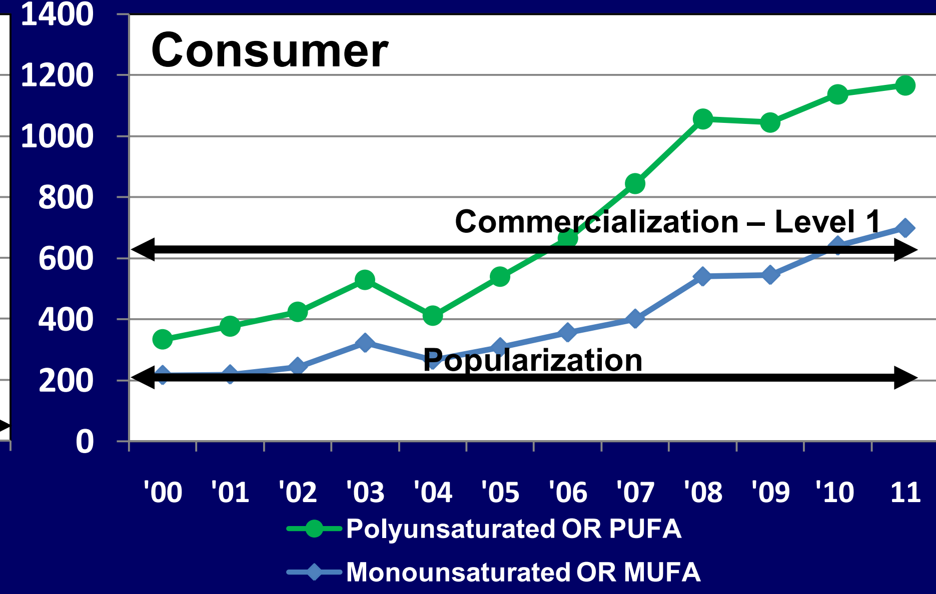
Consumers INCREASING Ingredients in Their Diet Due to Specific Needs



Hartman Group, Reimagining Health & Wellness 2010, Innova Market Insights, 2010 ; Hartman Healthy Eating Trends, 2009

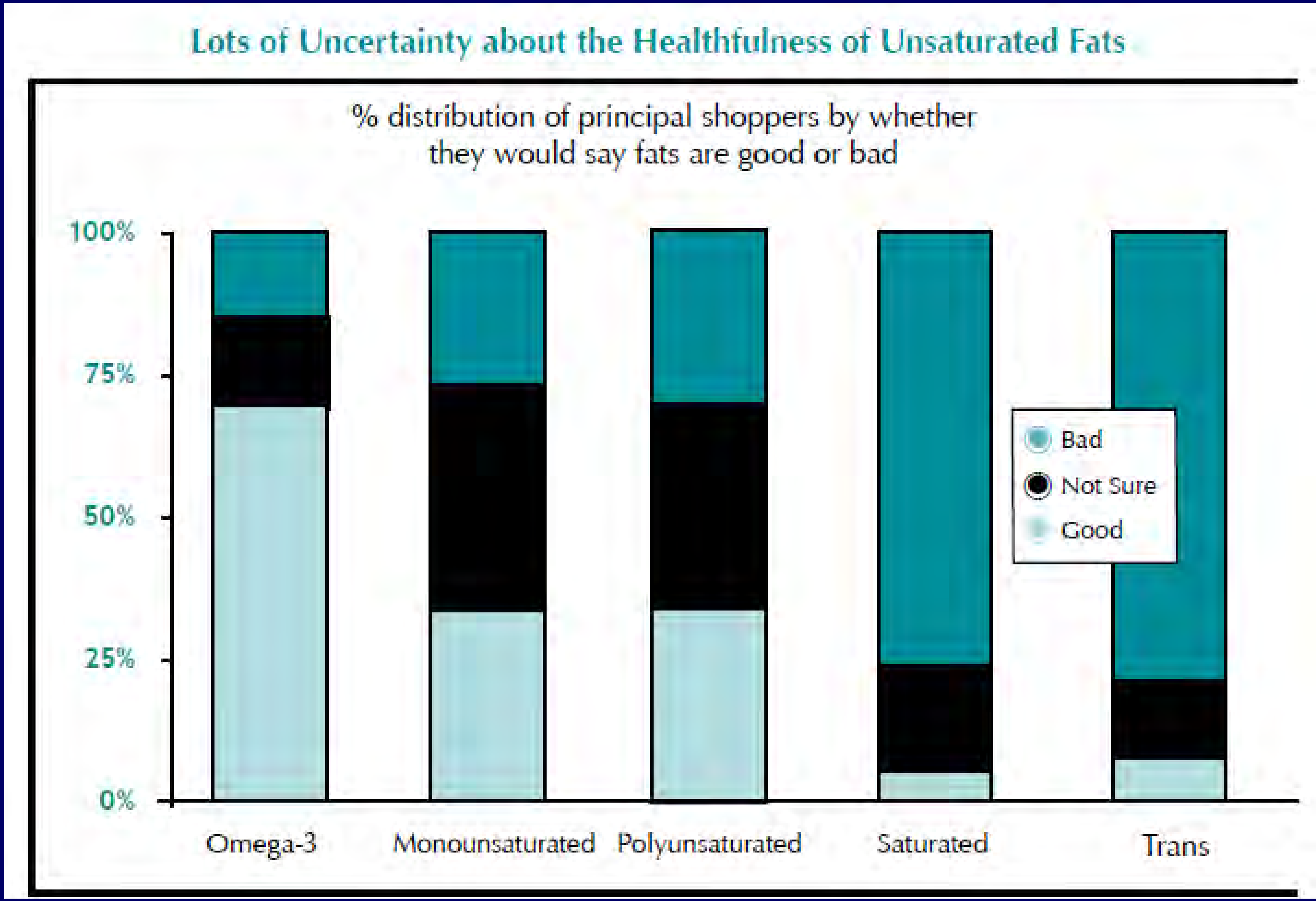
TrendSense™: Polyunsaturated vs. Monounsaturated





MUFAs and PUFA Now Mass Market Opportunity

Lots of Uncertainty of Healthfulness of Monounsaturated, but Awareness Growing

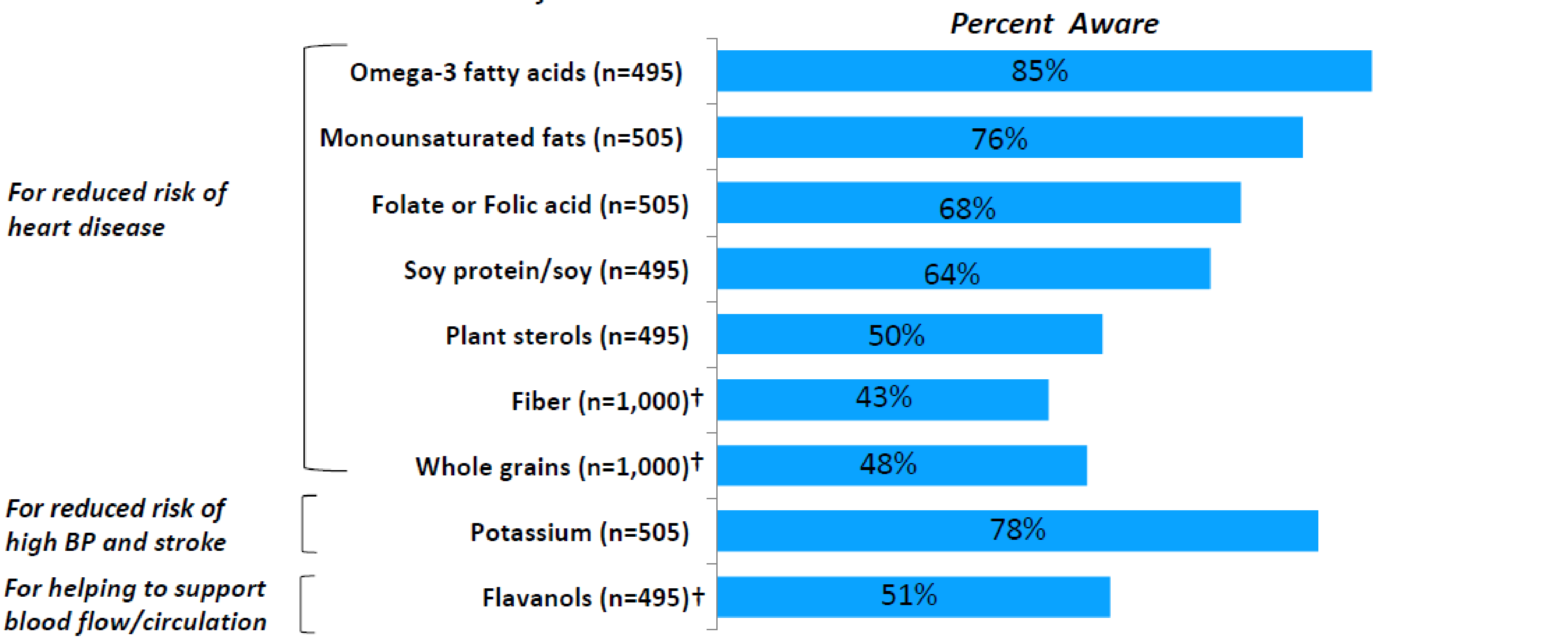


However, if Put in the Context of Heart Response Positive

Food Marketing Institute, Shopping for Health, 2010, 2011

Monounsaturated High Awareness Reduce Risk of Heart Disease

Between 85% and 43% of Americans are aware of specific food components and their associated heart health benefits.

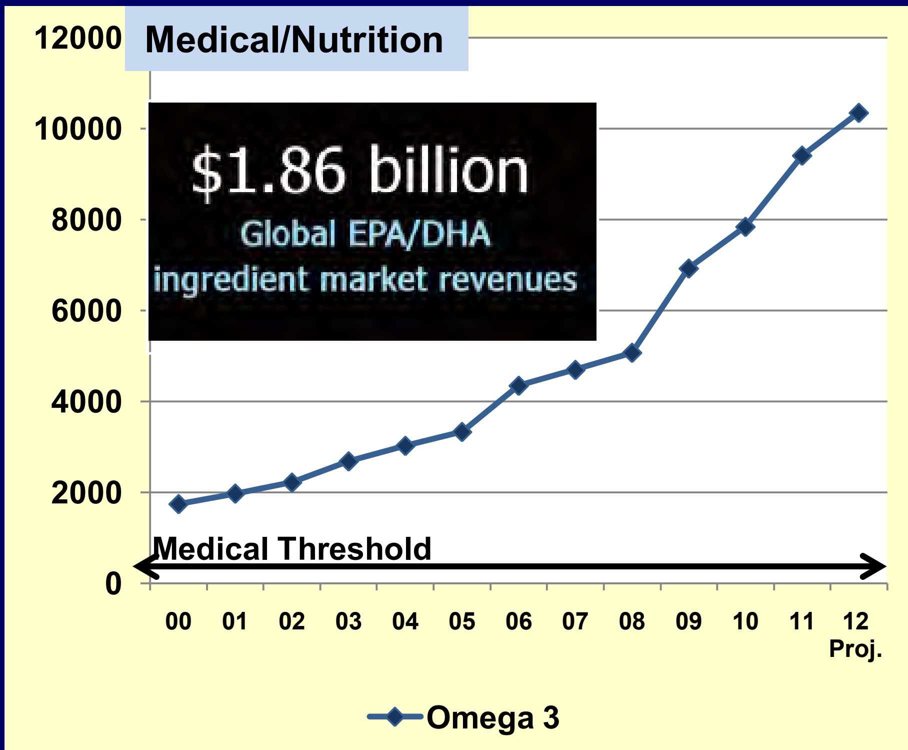


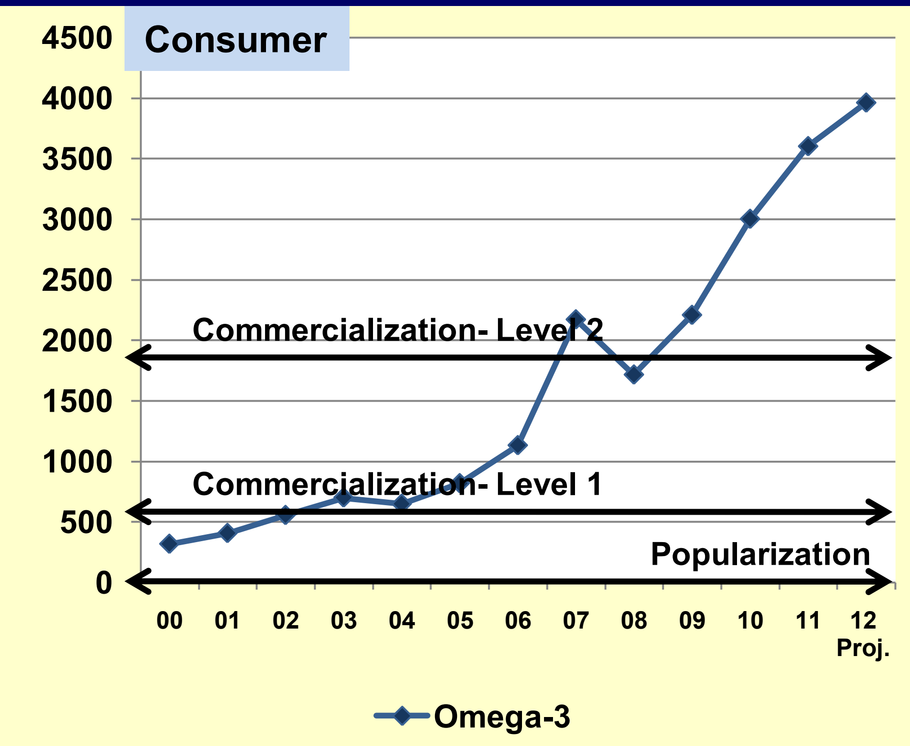
For each of the following food components or nutrients, please tell us whether you are aware that that food component or nutrient is thought to provide each of the following health benefits. (split sample)

Depends on How You Ask the Questions?

2011 IFIC Functional Foods/Foods for Health Consumer Trending Survey

Omega-3s Strong Growth Level 2 Mass Market on Par Vitamin D in Terms of Marketability



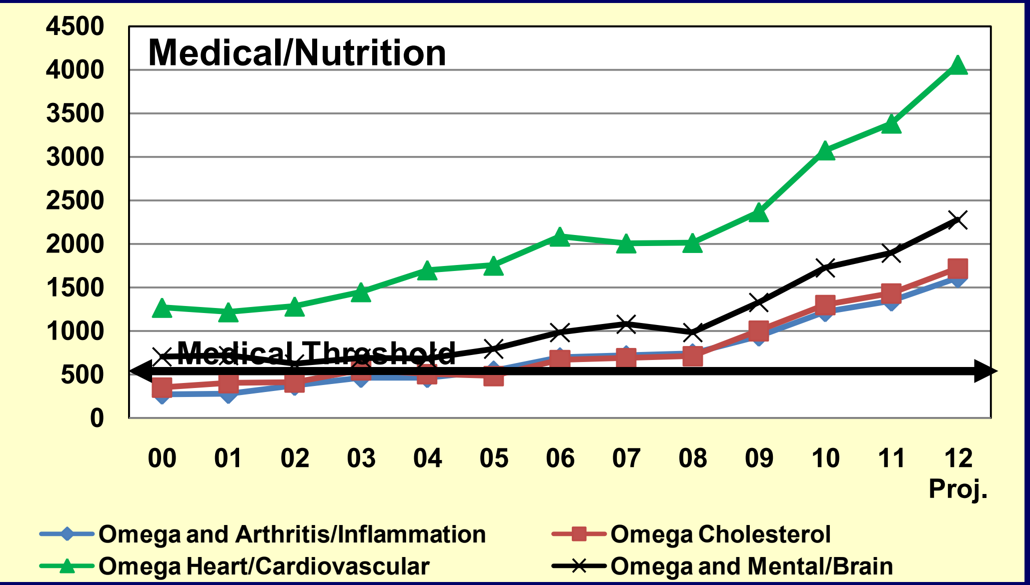


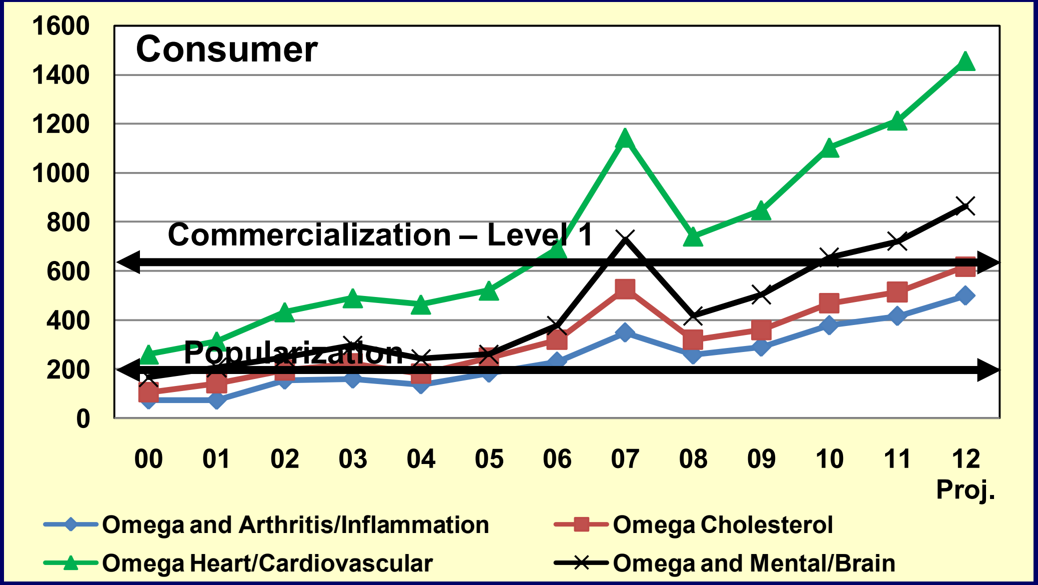
25% cardiologists personally use omega-3s[3]

9 in 10 Pharmacists Recommend Fish Oil for Heart, 2/3rds Flaxseed[4]

1. Sloan Trends, Inc.; 2012 2. GOED/Frost & Sullivan, 2012; 3. Healthcare Professional Impact Study, 2010; Pharmavite Pharmacist Study, 2012

TrendSense™ Analysis: Top Omega-3 Linkages





Strongest Links:
- Heart/Cardiovascular
- Mental/Brain

Up & Coming:
- Cholesterol
- Arthritis/Inflammation

13.6%

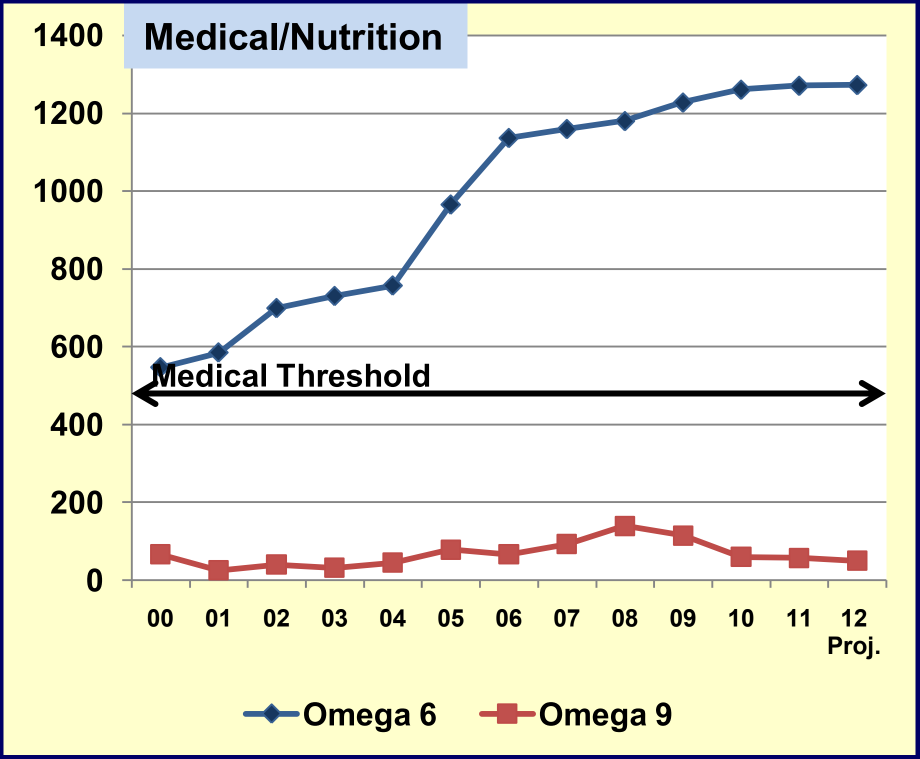
Global EPA/DHA ingredients market likely CAGR-revenue (2012-2016)

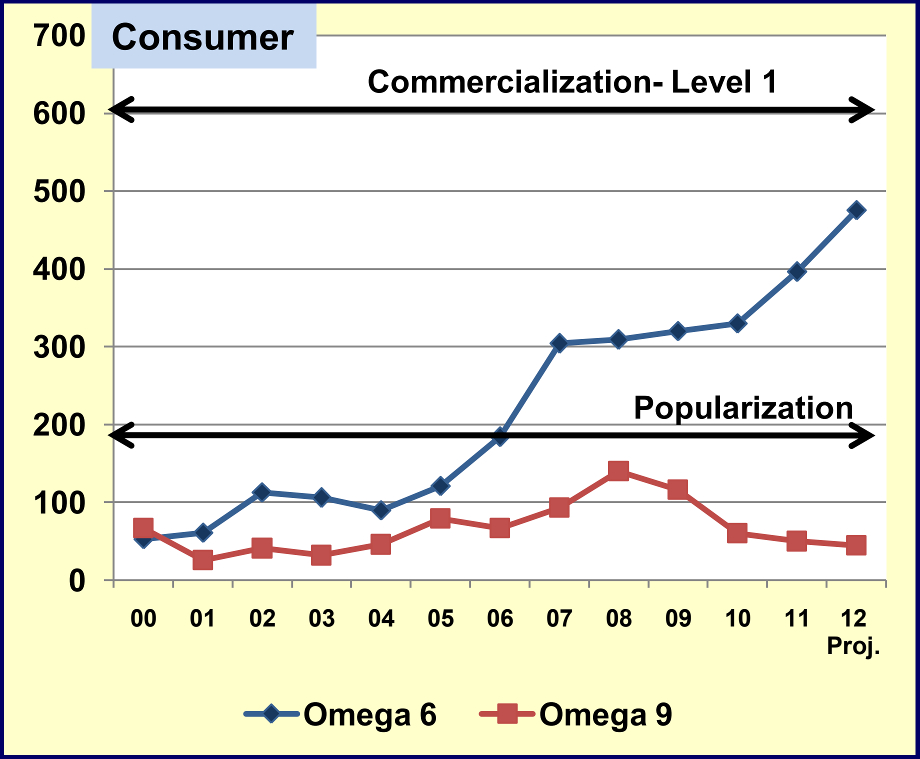
11.1%

Global EPA/DHA ingredients market likely CAGR-volume (2012-2016)

Sloan Trends, Inc.2012. Nutrition Business Journal, 10/2010

TrendSense™ Predictive Model: Omega 6 & 9





Omega-6 How do you describe:	Millennials	Gen X	Boomers
Don't know/ Unfamiliar	41%	30%	26%
Bad	15%	8%	11%
Neither good nor bad	17%	20%	21%
Good	26%	41%	42%

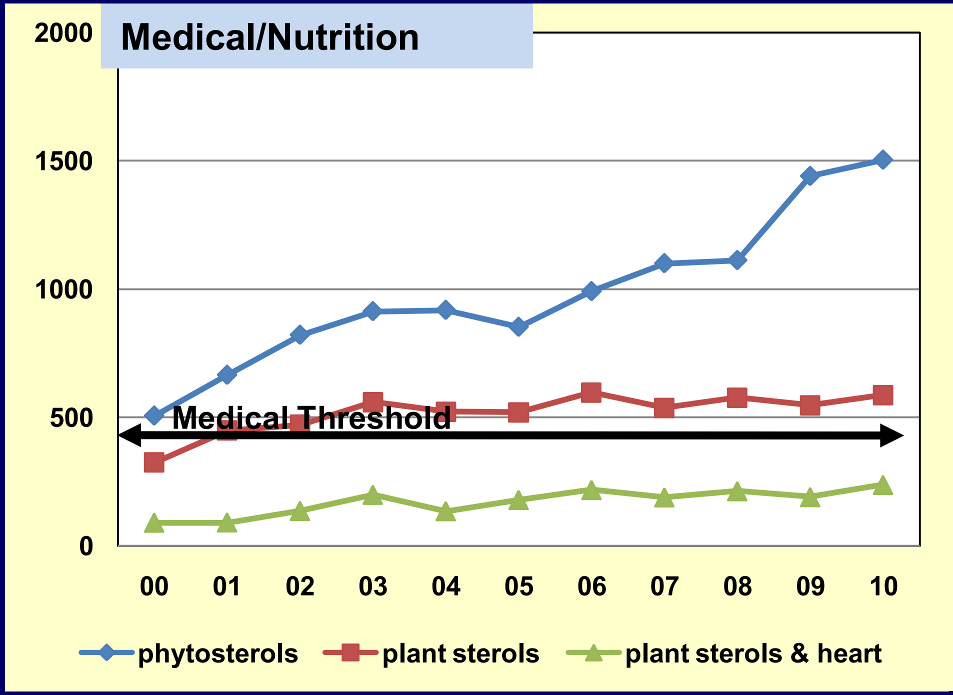
Omega-9 How do you describe:			
Don't know/ Unfamiliar	42%	33%	30%
Bad	17%	8%	13%
Neither good nor bad	15%	21%	20%
Good	26%	38%	37%

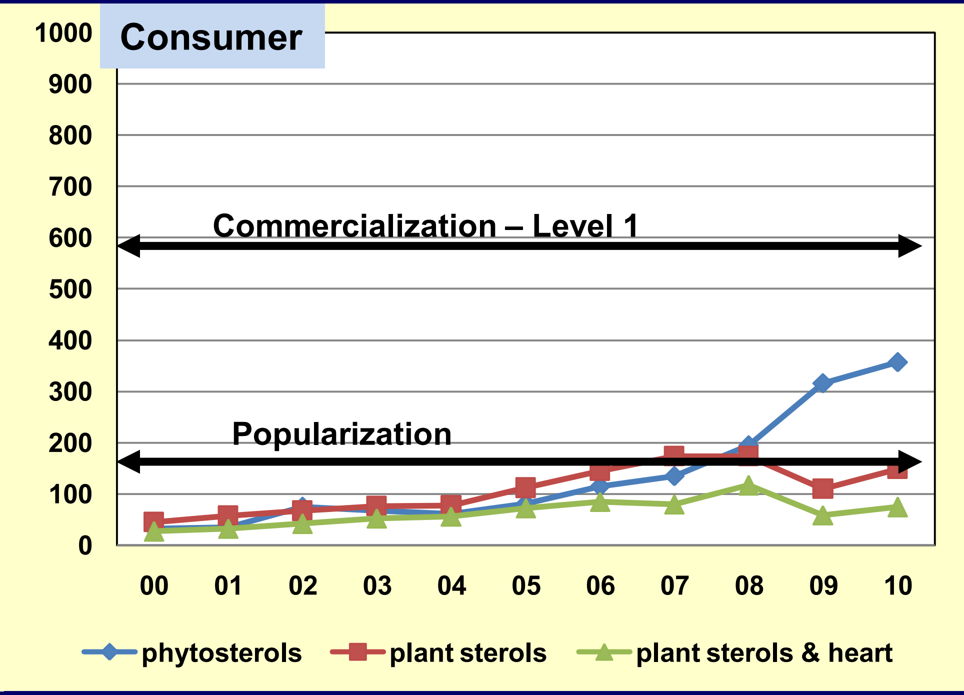
Dietary Guidelines & Am. Heart Assn. Support Omega-6s to Replace Undesirable Saturated Fats

Traditional Nutritional Experts: Ratio Omega-3/6 Important, May Promote Cancer & Other Serious Conditions

Sloan Trends, Inc, 2012; The Hartman Group, Re-imagining Health & Nutrition, 2011

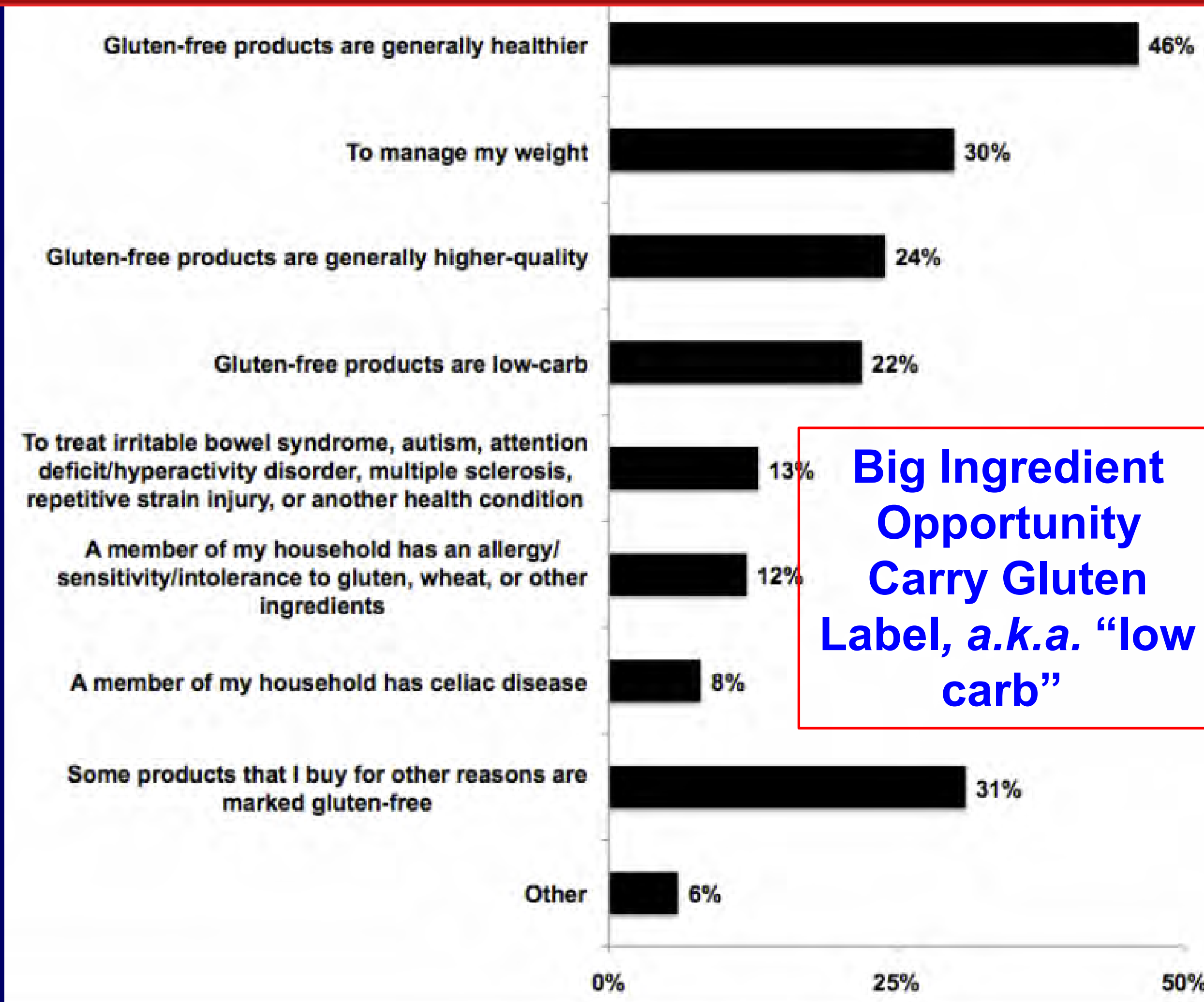
TrendSense™ Predictive Model: Phytosterols, Plant Sterols, and Plant Sterols & Heart





Gluten-free Foods/Bev U.S. = $4.9 B
Only 15% Bought, 1 in 133 Celiac[1]

Of 15% buying gluten free foods in past 3 mo. reason for purchase[1]:

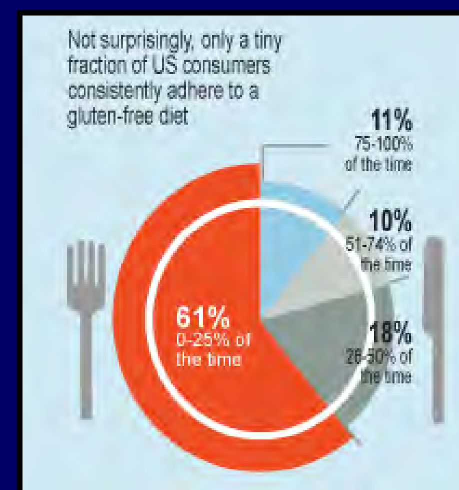


Big Ingredient Opportunity Carry Gluten Label, *a.k.a.* "low carb"

53% who bought gluten-free did not know the product was gluten-free[2]

Clean Label Hurts GF

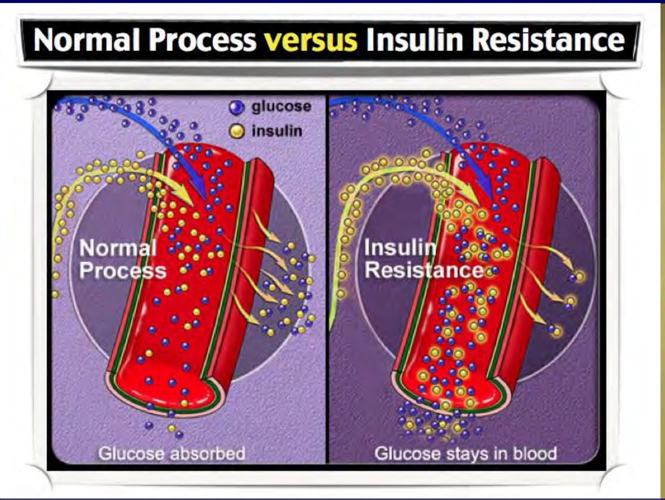
Unique Variety Drive Mkt



1. Packaged Facts, Gluten-Free Foods and Beverages in the U.S., 2.. The Hartman Group, Gluten-free, Hartman Salt 2/2011 ; Euromonitor, 2011

Pecans Can Play Beneficial Health Role

The New Risks



Pecans Lower Cholesterol/LDLs

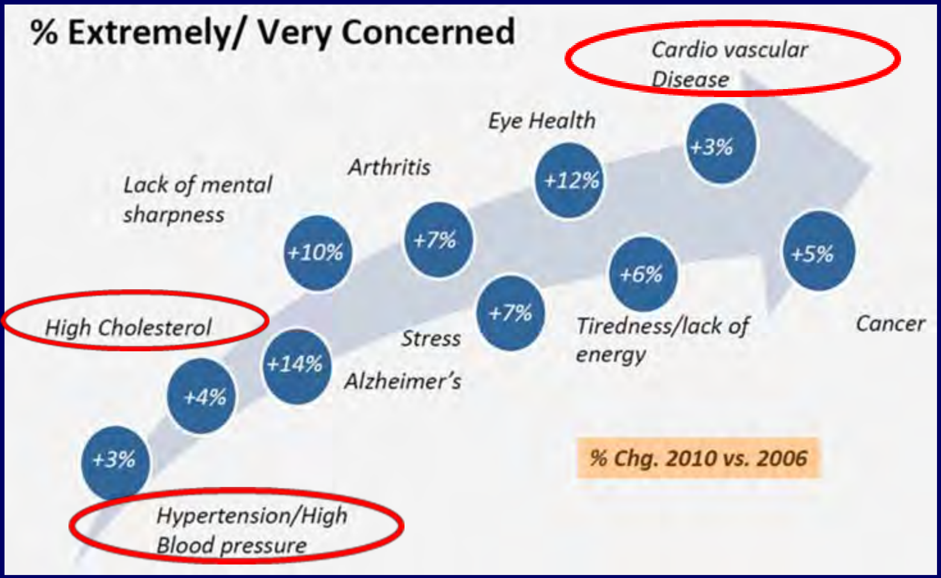
New Ops, Old Heart Health Sector

Heart #2 Health Concern

Top 10 Ext// Very Concerned	18-29	30-39	40-49	50+
Retaining mental sharpness as I age	59%	55%	61%	70%
Cardiovascular disease	56%	51%	61%	68%

Serious Disease
% of US Households

	# of US Households (in Millions)
High Cholesterol	50.5
High Blood Pressure/ Hypertension	49.9

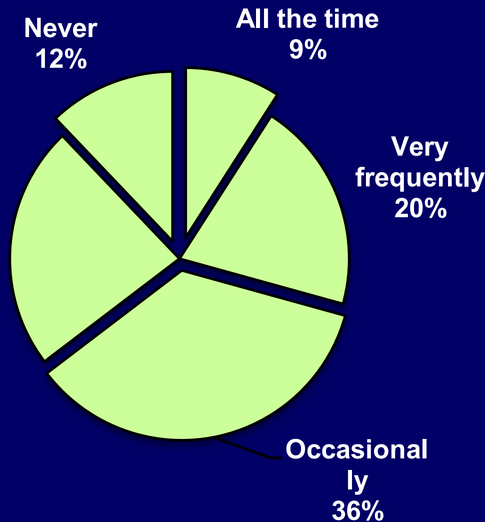


Concern	Millennials	Gen X	Baby Boomers
High Cholesterol	40%	54%	68%
High Blood Pressure	40%	48%	66%
Heart/Cardio Concerns	25%	34%	46%

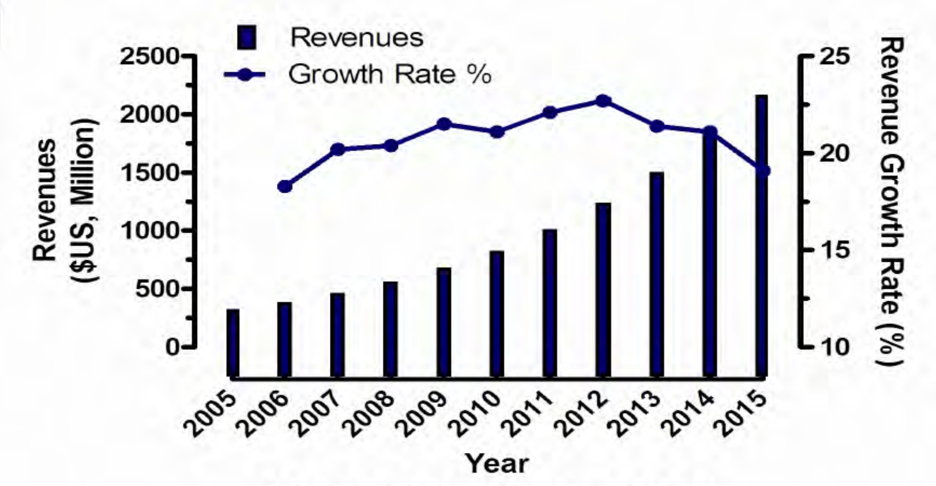
Heart Disease Among the Fastest Growing Health Concerns[3]
←

1. Health Focus International 2011; Mintel, Heart Disease – US, 2012

Condition Specific Benefits
56% Very Frequently/Occasionally



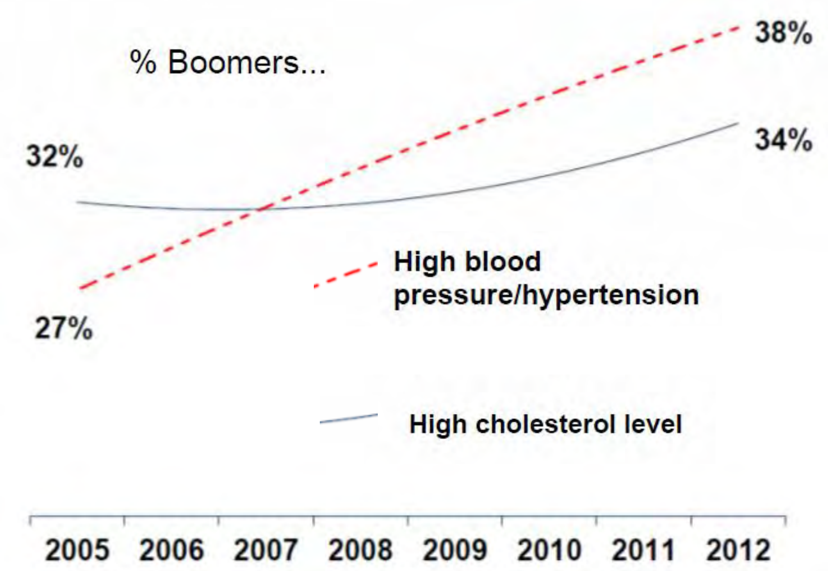
Heart Health Market Sales/Forecast: Supplements, Food/Bev[1]



% Bought Food/Bev in 2011 for Health

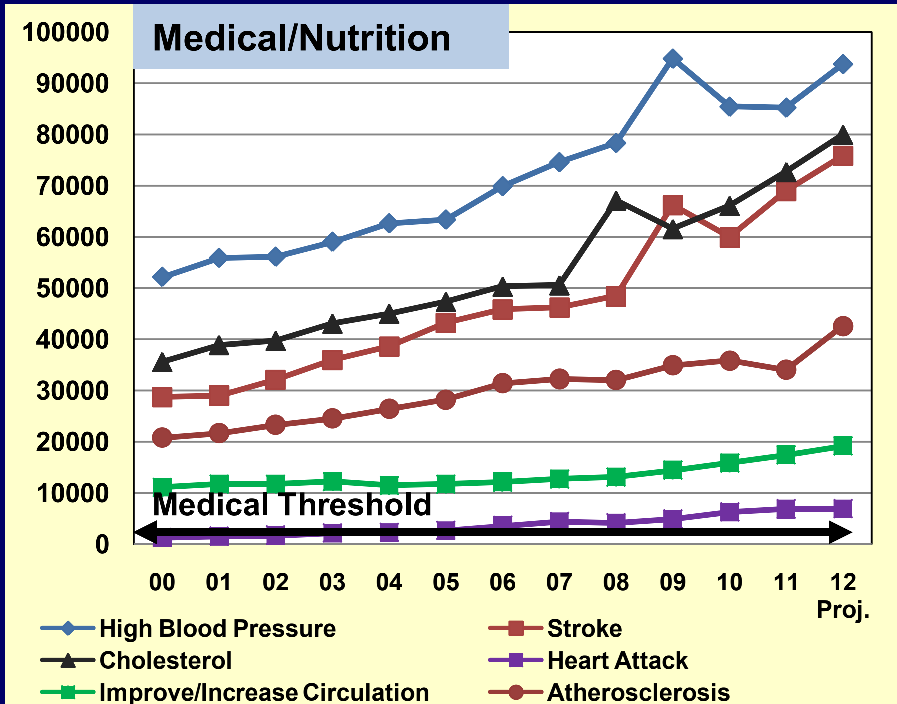
• Cholesterol	24%
• Digestive Health	23%
• Immune System	16%
• Joint/Bone Health	15%
• Heart/Circulatory Health	15%
• Blood Pressure	15%
• Eye/Vision Health	11%
• Diabetes	10%
• Allergies	9%
• Female Health	8%

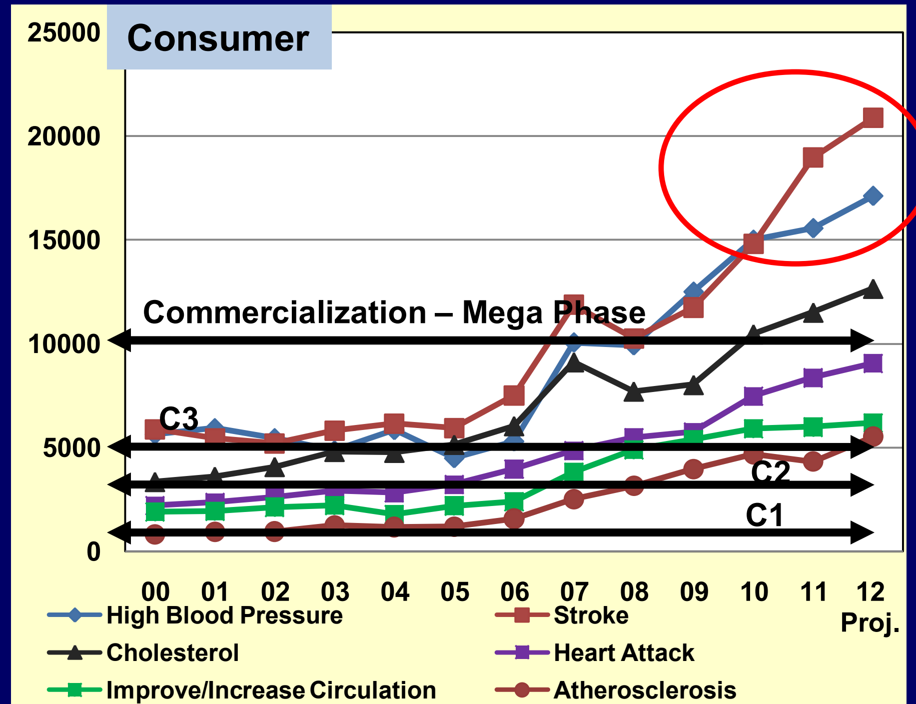
Management Heart Issues Continue to Increase



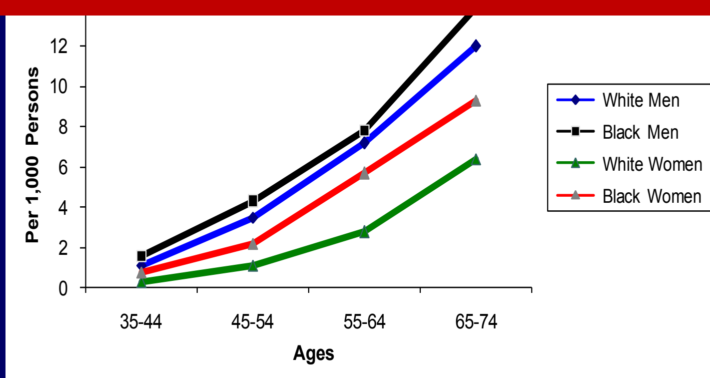
Packaged Facts, Targeted Health and Wellness Foods and Beverages: The U.S. Market and Global Trends February 2012

TrendSense™ Predictive Model: New Focus Heart Attack, Stroke, Circulation, Plaque Build up

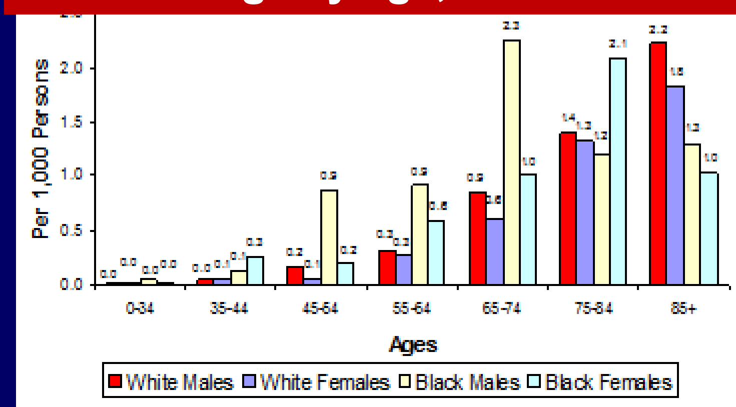




Annual rate of first heart attack

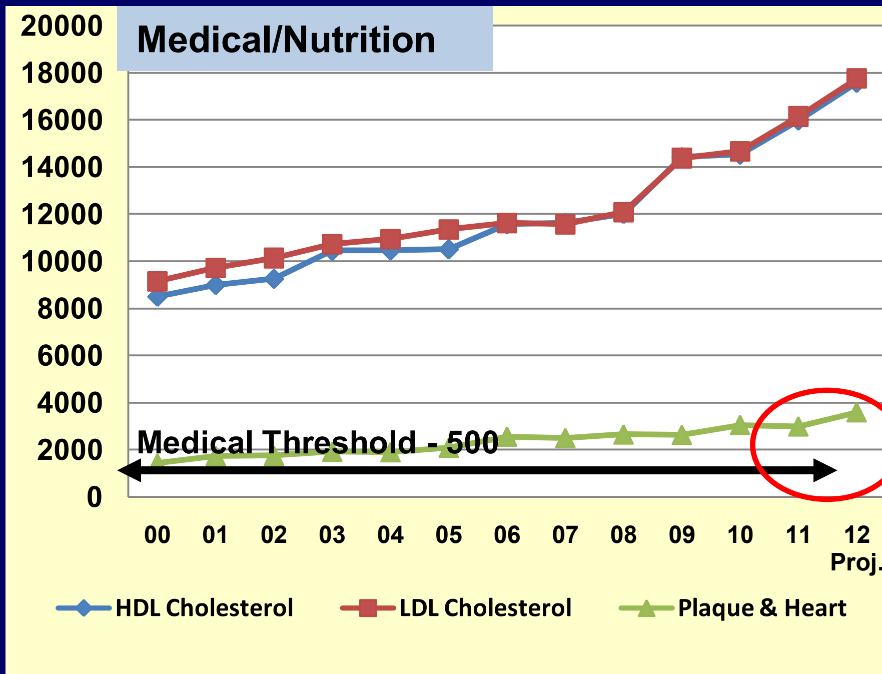


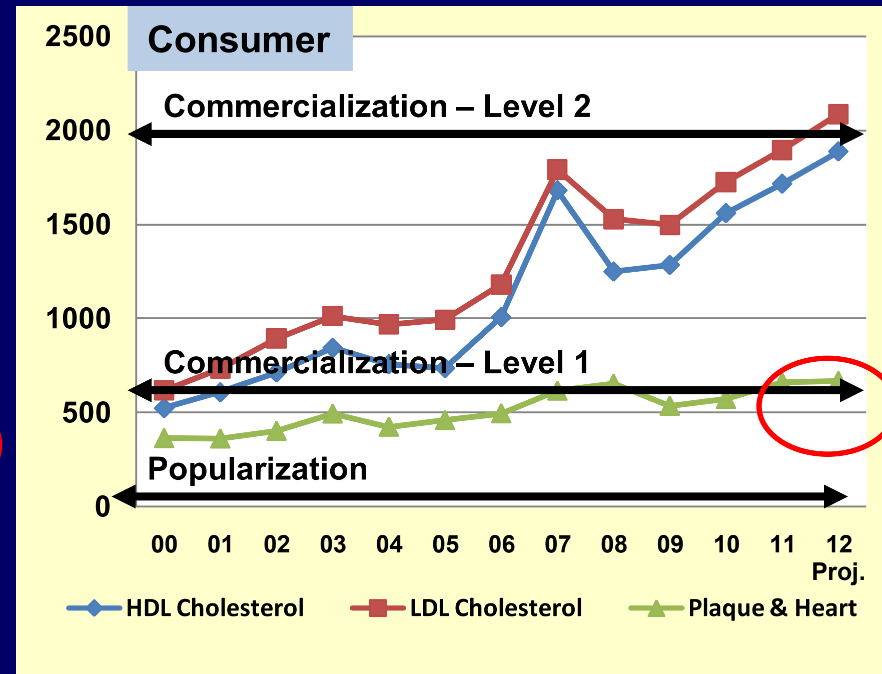
Annual rate of first intra-cerebral hemorrhage by age, sex and race



Sloan Trends, Inc. 2012; American Heart Assn, 2012

Plaque & Heart Reaches Mass Market Status





Use of Non-Prescription Remedies, Healthy vs. Other 50+ Consumers 2010 Ref. #2

Category	50+		50-64		65+	
	Healthy	Other	Healthy	Other	Healthy	Other
Stroke prevention	5	6	3	5	7	8
Heart attack prevention	12	18	10	17	16	20

Atherosclerosis #1 Heart Issue Supplements

Combined Channel	Current $
Atherosclerosis	$393.5
High cholesterol	$362.6
Hypertension	$837.2
PMS	$346.8
Weight loss	$285.8

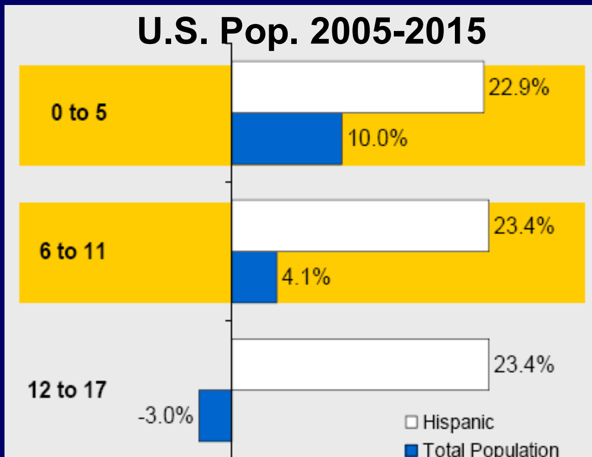
Soure: 52 weeks ending 8/7/10; Proprietary and confidential SPINS Inc. 2010

Health concerns of personal preventative/curative concern to you /your household

Answer Options	Very Important	Important	Somewhat Important	Not Important
Atherosclerosis	13.9%	21.9%	28.3%	29.1%

Sloan Trends, Inc. 2012; SPINS 10/2011; Virginia Dare, Flavor Oasis, IFT 2012

Kids at Risk, 1st Gen. Obese Kids, AAP Action



Risk Factors US Kids

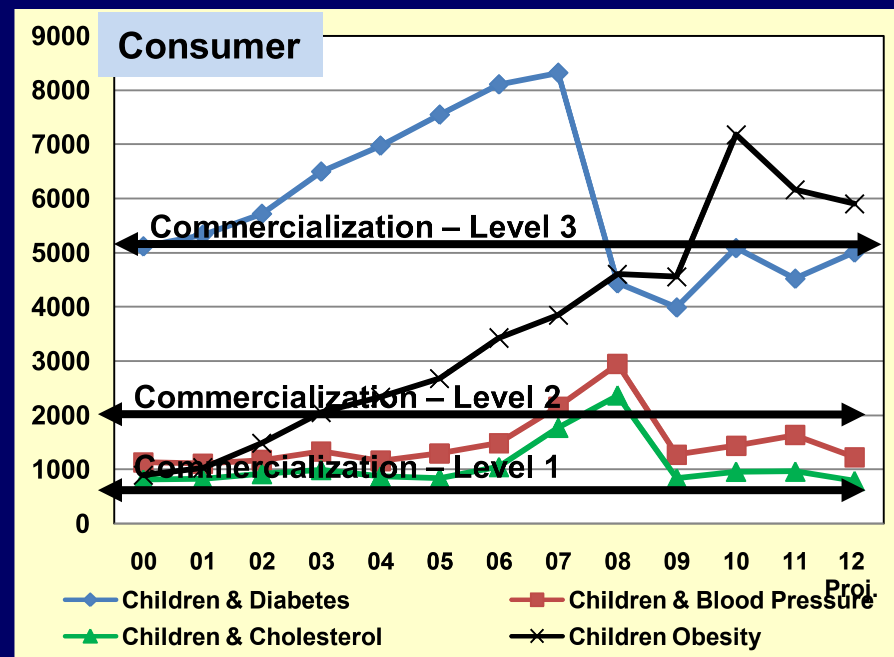
- 1 in 8, 2+ risks CVD
- 1 in 3 born >2000 be diabetics
- 1 in 3 overwt, 1 in 5 obese
- 1 in 7 pre-schoolers obese

AHA, AAP, NIH - monitor:

- Calcium → age 3, obesity age 6
- Blood Pressure → age 3
- Lipid Panel → age 2 < 8
- Counseling on Weight, 1st Time
- AAP Treat Chol. In Kids Statins

2M Kids Pre-diabetes, 2.9M Met X, Stroke

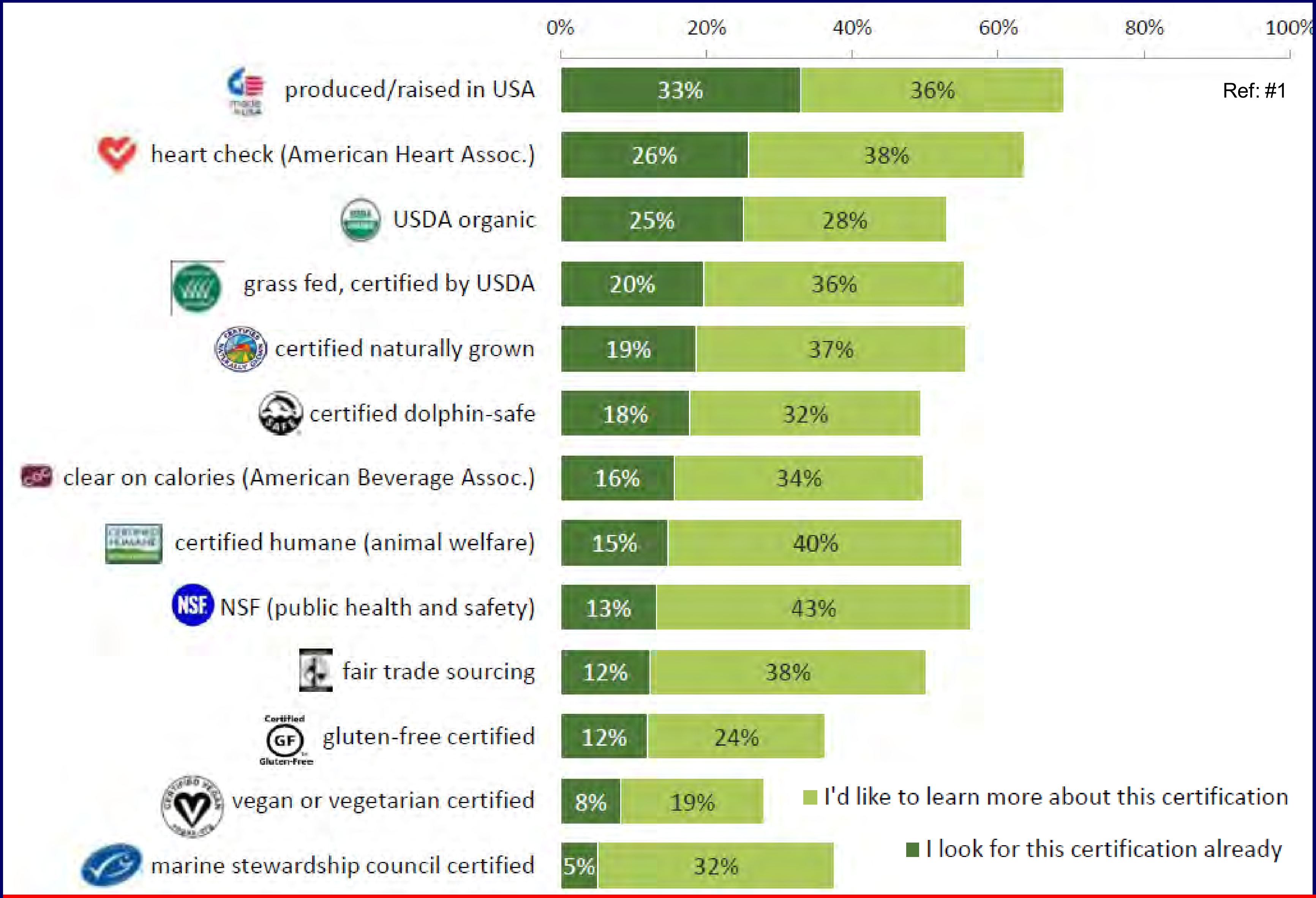
HPB Tripled Kids 3-18,10 Yrs



NHLBI Mandatory Lipid Testing Kids 9-11. 16-17

Gallup, 2008; FMI Shopping For Health, 2008; Sloan Trends, 2009; HealthFocus, 2009; CDC, 2010; JAMA, 2010; AAP/AHA, 2010, 2008; NDAssn. 2009

U.S. Interest Ethical Certification



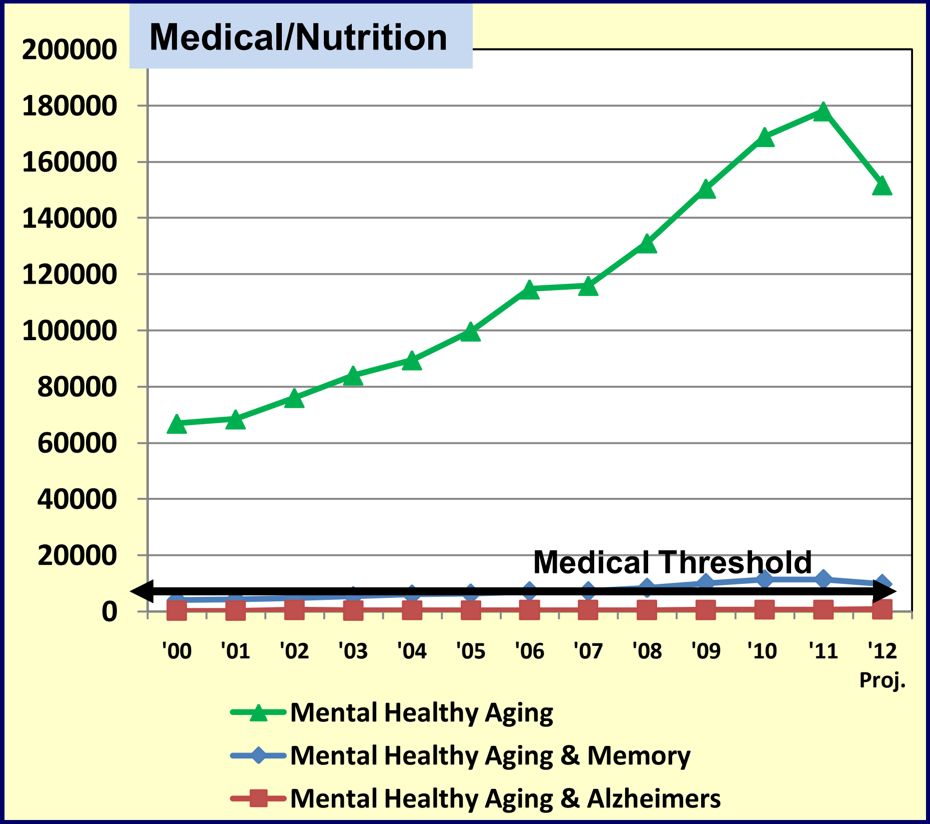
US: Sales of Fair Trade Certified Reached $361M in Supermarkets,+16% vs. 2010

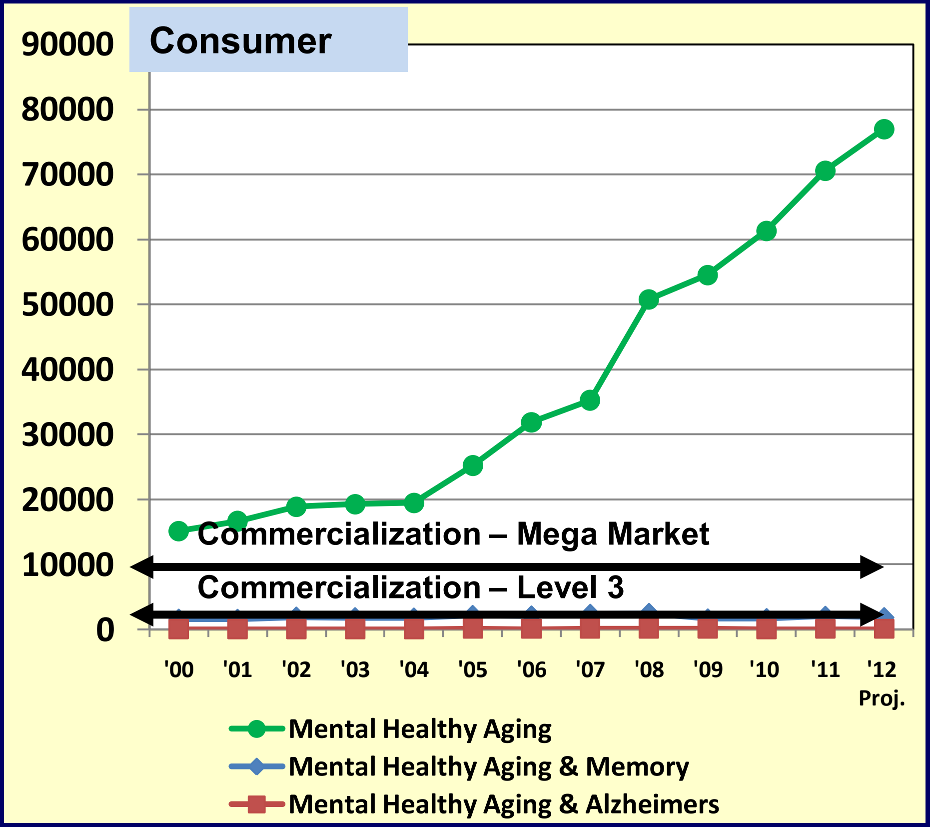
1. Hartman Group, 2011, Deep Dive into Health & Nutrition; SymphonyIRI, 1/2012; 2. Innova Market Insights, 2012

Pecans: May Aid Aging/Mental Function

Mental and Healthy Aging

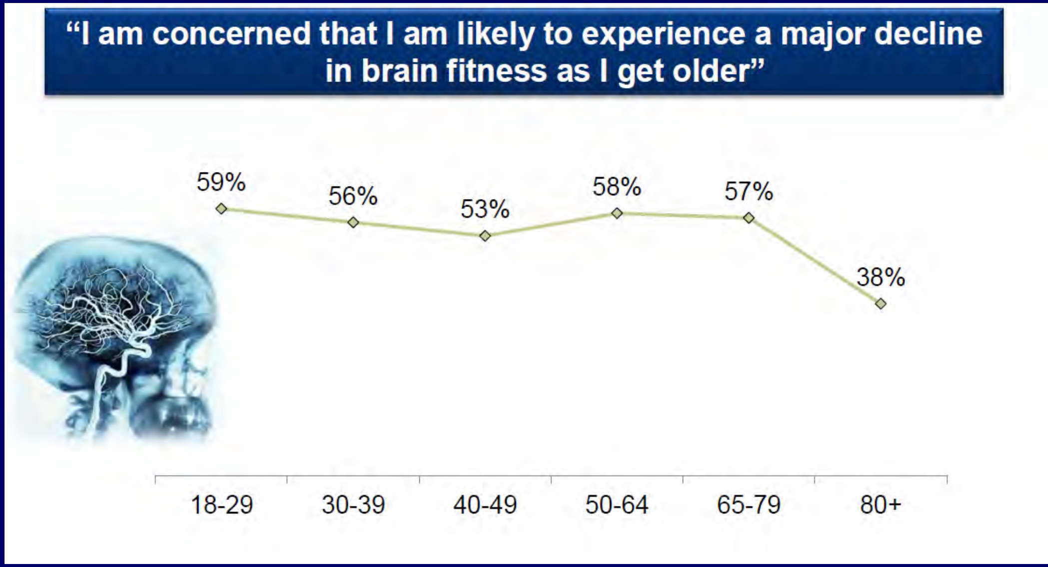
TrendSense™: Mental & Healthy Aging





Top 10 Health Concerns

Extremely / Very Concerned	18-29	30-39	40-49	50+
Retaining mental sharpness as I age	59%	55%	61%	70%
Cardiovascular disease	56%	51%	61%	68%
Cancer	65%	54%	58%	64%
Bone health / strength	57%	46%	59%	67%
Maintain ability to continue with normal activity as I age	56%	50%	57%	63%



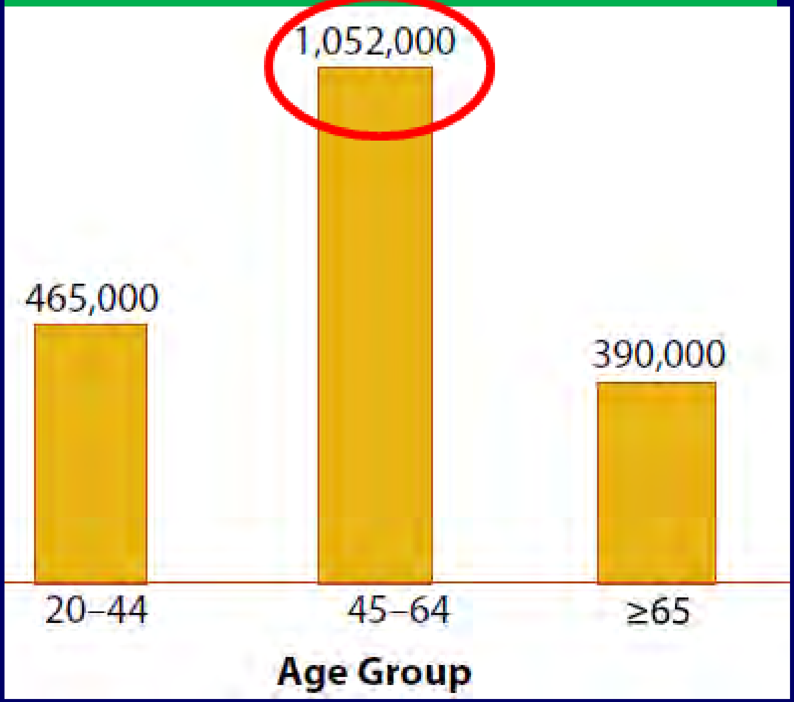
HealthFocus, 2011

Pecans: Evidence May Aid Blood Sugar Control

Blood Sugar: Long-Term
Energy, Diabetes, Glycemic Index

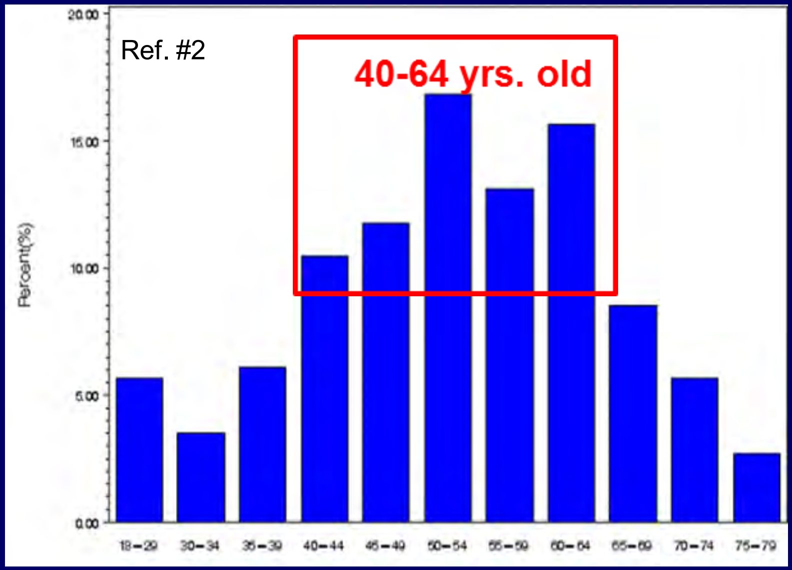
Boomers in Age Range Most Likely to be Diagnosed, Diabetes Epidemic Proportions > $1M New Cases/Year

1.9 Million New Cases Diabetes Diagnosed in 2010 by Age[1]



Epidemic = 1 Million New Cases/Year[2]

Age at Diagnosis: 68% aged 40-64

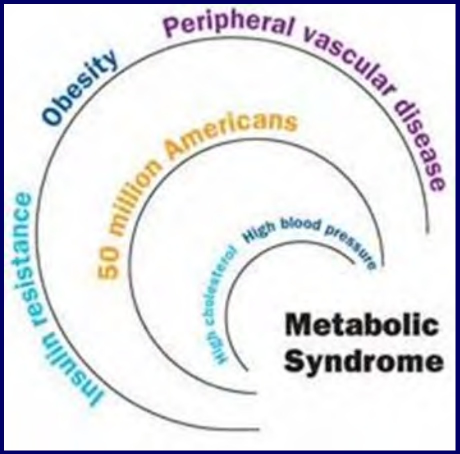


Move to Prevention and Risk Factor Control - Insulin Resistance, Pre-Diabetes

1. CDC, Diabetes Fact Sheet, 2011; 2. Am. Diabetes Assn., 2010 National Diabetes Fact Sheet, 2011

New 1st Time Ever Diabetes Campaigns Shift To Risk Factors & Prevention

79 M U.S. Adults
Have Pre-diabetes
50% Adults Aged 65 years



Prevalence of Metabolic Syndrome

- 35.1% Men; 40.8% ages 40-59, 51.5% age 60+
- 32.6% Women; 37.2% ages 40-59, 54.4% age 60+

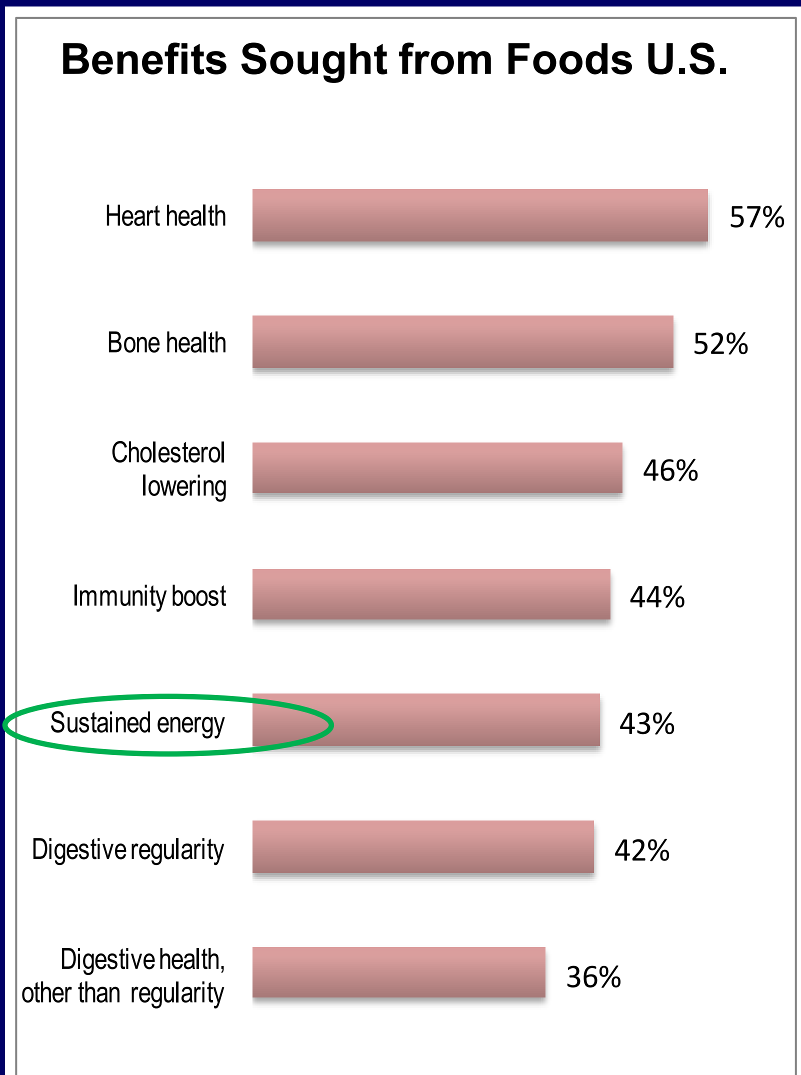
A joint report Am. Diabetes Association & the National Institutes of Health (NIH), both recommended all people 45 years or older be tested for pre-diabetes regardless of weight

High blood glucose is the 4th largest cause of preventable death in America – behind smoking, obesity and high blood pressure

Diabetes 7th Leading Cause of death in the U.S.

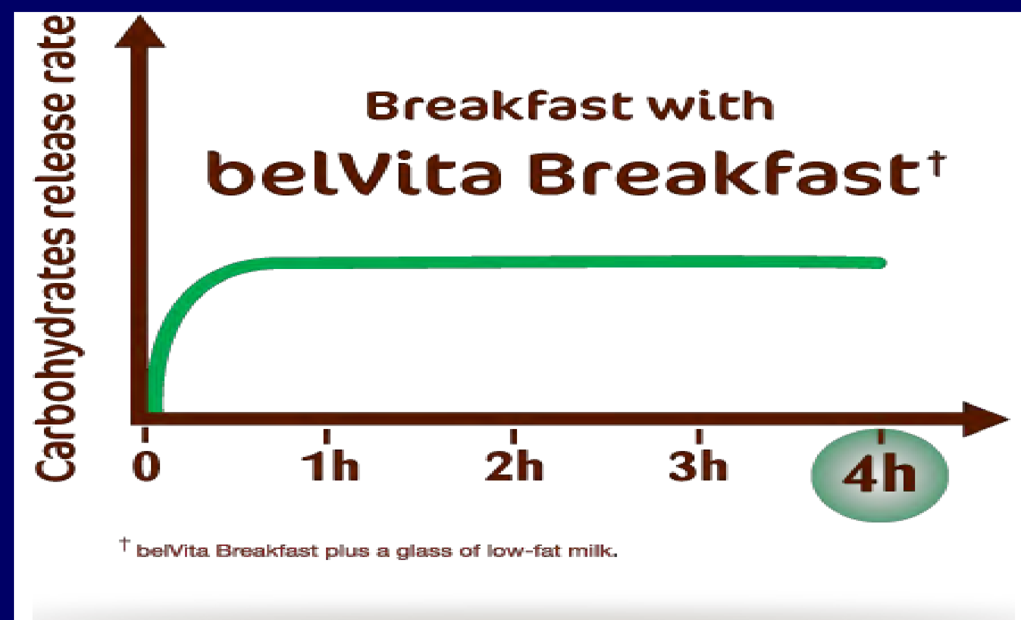
1. CDC, Diabetes Fact Sheet, 2011; 2. Am. Diabetes Assn., 2010

Sustainable Energy Big Opportunity
4 in 10 Look for Longer Term Energy



Protein?
Blood Sugar?

U.S. Energy Shots > $1B
2011 Led by 5-Hour Energy
It's abut the Promise Not the Form
Shots Drive Category



Reimagining Health & Nutrition, Hartman Group, 2010

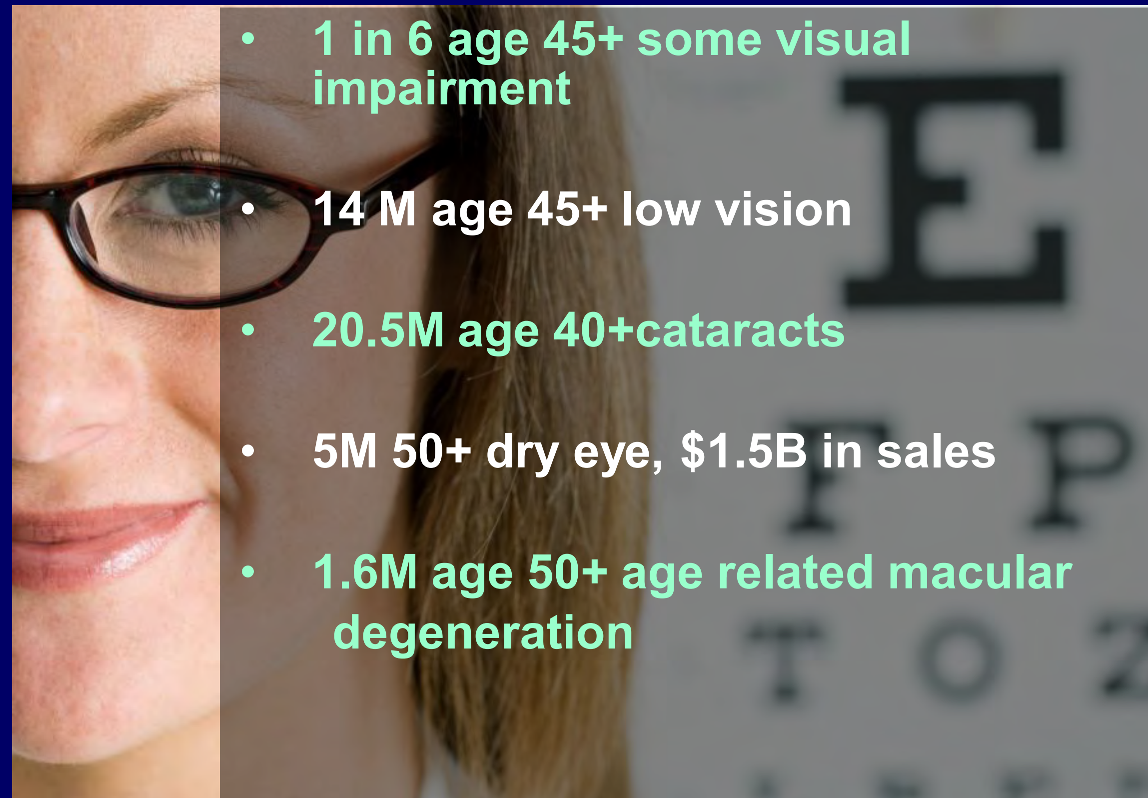
Pecans: Nutrients in AREDS Study National Eye Institute

Eye Health



Eye Health, Reading, Night Vision, Dry Eyes

Top 10 Ext/Very Concerned[1]	Age 50+
Retain mental sharpness (age)	70%
Cardiovascular disease	68%
Bone health/strength	67%
Cancer	64%
Able continue normal activity with age	63%
Eye health	63%
Arthritis	63%



Types of Physicians Visited Last Year 50+[1]

	50+		50-64		65+	
Category	Healthy	Other	Healthy	Other	Healthy	Other
Cardiologist	9%	15%	5.06%	10%	14%	22%
Chiropractor	7	9	8	9	7	10
Dermatologist	9	10	8	8	12	14
Ear, nose & throat	4	7	4	6	4	8
Eye doctor	28	31	22	25	36	40

Eye Health is a Dr. Recommended Category
#1 MD Visited by 50+
Practitioner Sales Op

1. Eye on the Boomer Survey, Ocular Nutrition Society; 2. HealthFocus, 2010

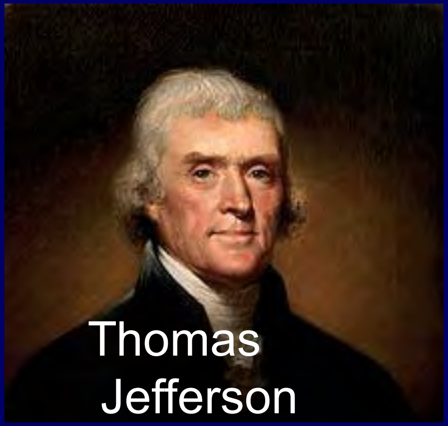
Most Desired Functional Food Attributes Align Well with Protein

Desired benefits in functional foods, by age	All %	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65+ %
Help maintain healthier body wt	64	68	56	64	66	68	64
Lower cholesterol	64	55	54	62	66	78	78
Maintain healthy digestive system	63	60	59	63	67	68	65
Maintain strong immune system	60	65	56	53	59	62	66
Enhance metabolism	54	56	47	60	51	60	50
Lower blood pressure	54	49	44	52	55	67	65
Maintain healthy body weight through satiety	53	54	46	57	55	54	53
Healthy blood sugar levels	53	46	49	51	55	62	61
Enhance memory	47	55	47	43	42	50	49
Promote longevity	45	44	36	52	43	49	51
Elevate mental focus	41	57	42	35	38	39	35
Relieve stress	41	53	39	40	40	44	31
Make facial skin look younger	38	39	37	42	36	40	35
Elevate mood	35	51	35	37	30	29	25

	18 Countries	18 Countries	Canada/Mex/ Brazil	Canada/Mex/ Brazil	Europe	Europe	Asia/ Pacific	Asia/ Pacific
	2008	2010	2008	2010	2008	2010	2008	2010
Choose food/drinks because high in protein - Always/ Usually	37%	39%	37%	40%	21%	23%	54%	54%

1. Mintel, Functional Food – US, 2010; 2. HealthFocus, 2011

Some PR Ideas: The Election Nut



- The 2012 Election Nut, Tie to Washington, Jefferson
- The Worker Snack, 44% Gained Weight in Present Job
- Great Tasting Fiber Supplement
- Bite for Bite One of the Most Nutritious Snacks
- Help Manage Risk Factors in Kids
- Remember "A Rising Tide Floats All Boats"

CONCLUSION:

Eat and drink *what you like*.

Speaking *English*
is apparently what kills you.

www.sloantrend.com

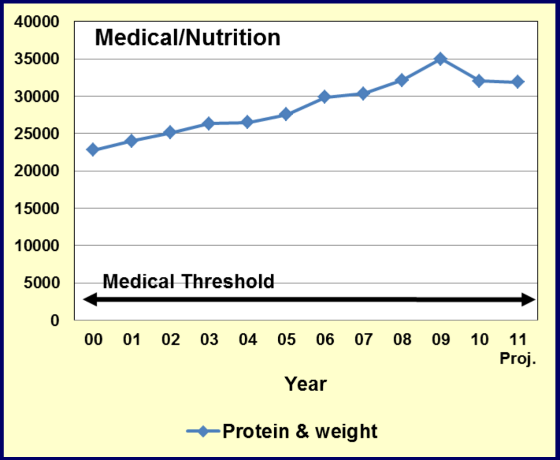
Dr. A. Elizabeth Sloan
Marketing, Trends

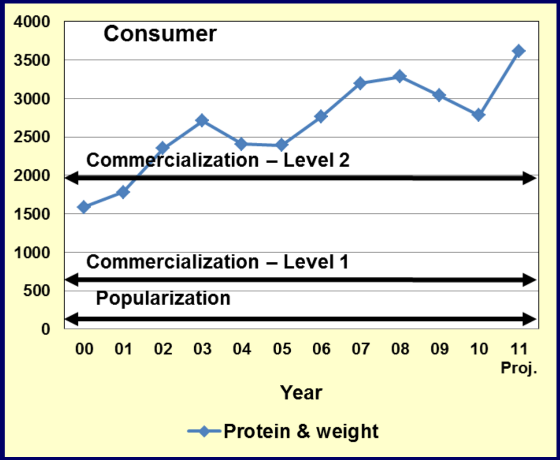
Dr. Catherine Adams Hutt
Chief Officer, Science, Regulatory

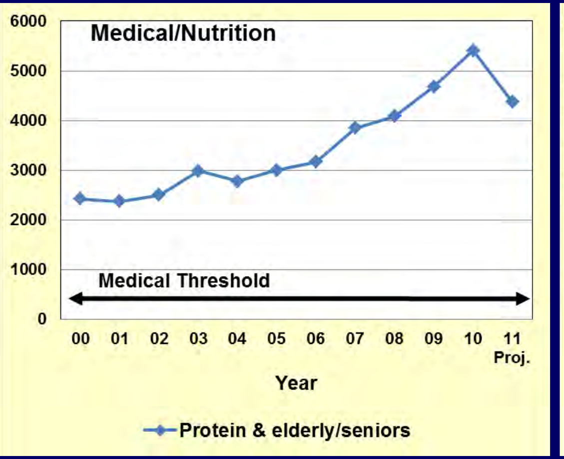
lizsloan@sloantrend.com

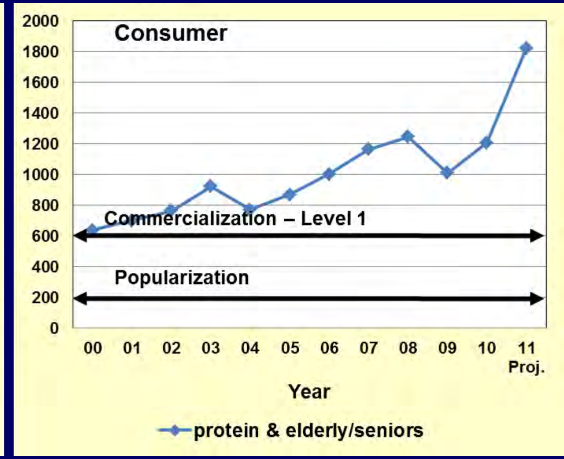
catherineadams@sloantrend.com

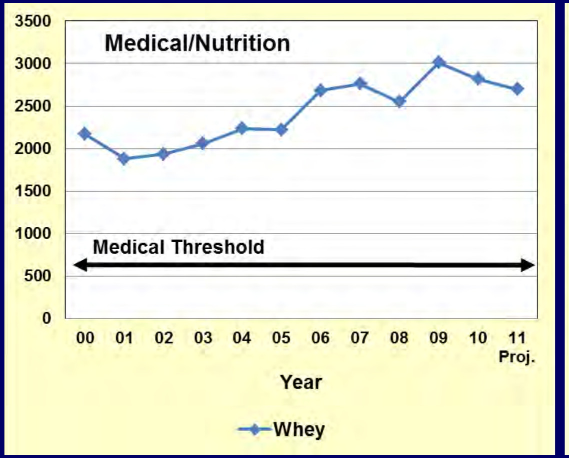
Nutraceuticals World - Getting Ahead of the Curve Column

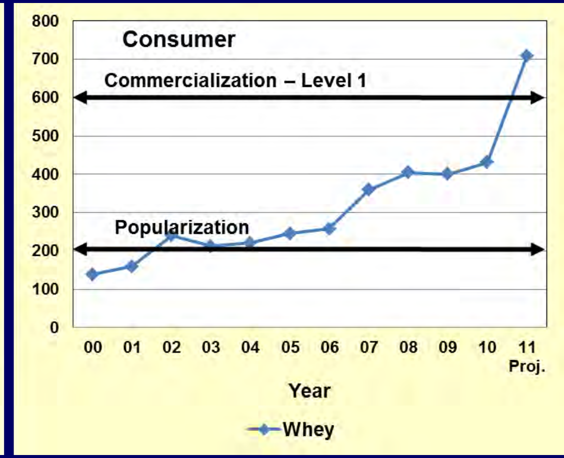












- Whey Protein
- DHA, Omega 3, 6, 9
- Childhood Obesity
- Protein & Weight
- Gluten-Free
- Probiotics/Prebiotics
- Energizing Ingredients
- Mental/Brain
- Sarcopenia
- Marine Nutraceuticals

- Antioxidants
- Phytochemicals
- Vitamin C/D
- Immunity
- Satiety
- Childhood Obesity
- Hypertension
- Omega's
- Phytosterols
- Sat Fat/Sodium