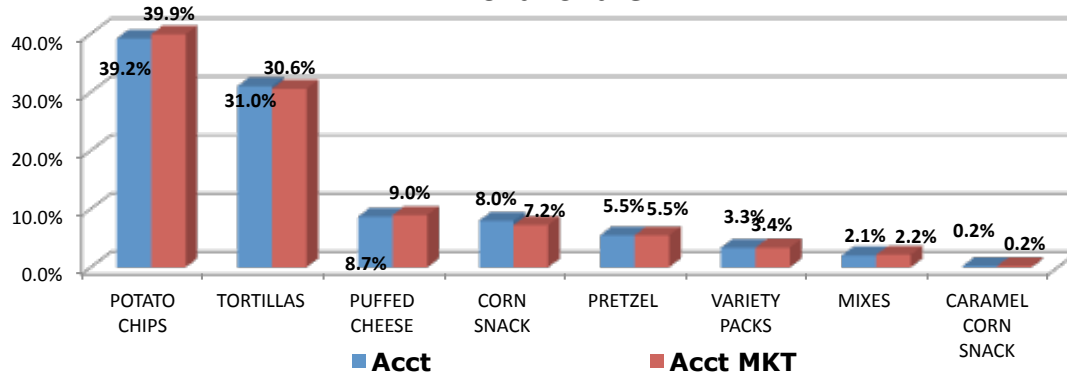
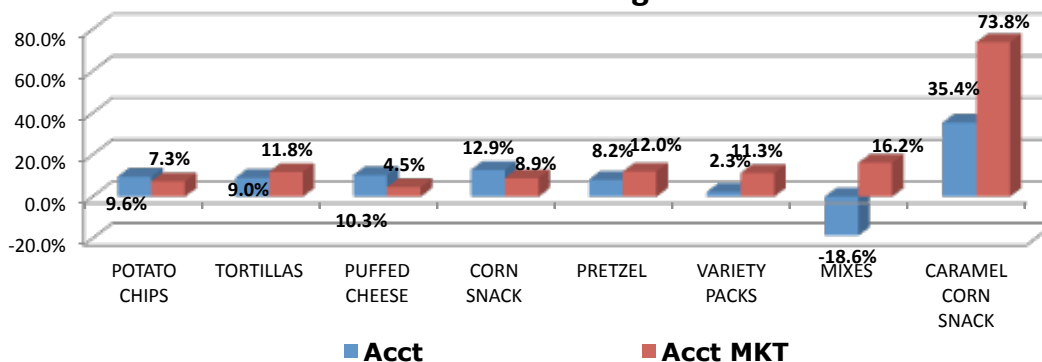


Salty Snacks Overview

Dollar Share



Dollar % Change

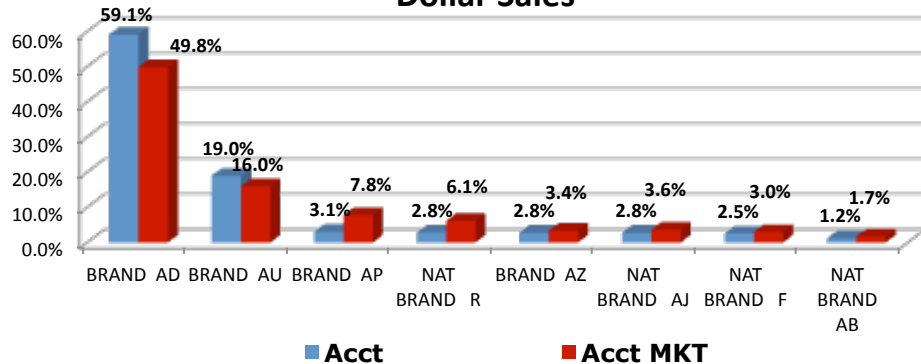


- Salty Snacks is a \$38 billion dollar category
- Salty Snack sales are up +8.8% in the account and +7.3% in the market
- Pretzels, Carmel Corn, and Corn Snacks are the primary growth drivers
- Potato chips are up +9.6% in dollars and +13.5% in units in the account
- Potato chips represent 39.2% of total category sales in the account
- Potato Chips has the largest dollar opportunity gap \$103,320

Potato Chip Segment

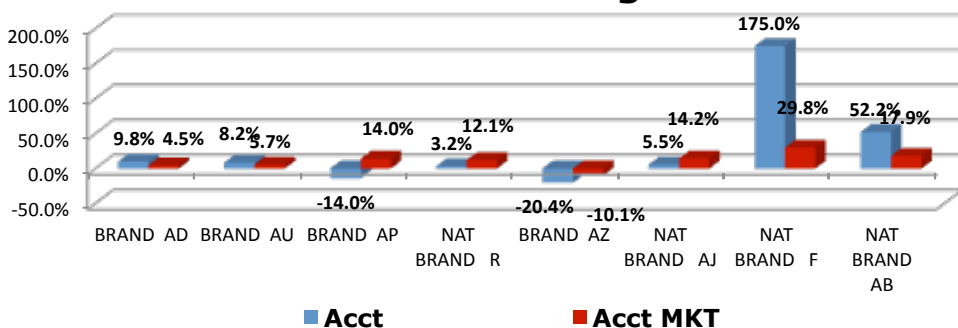
Brand Comparison

Dollar Sales



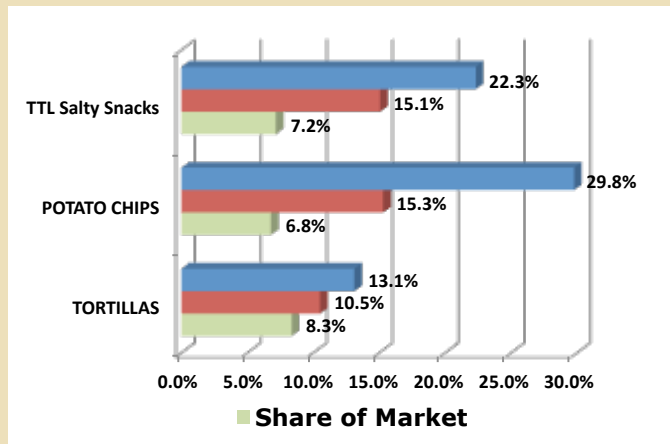
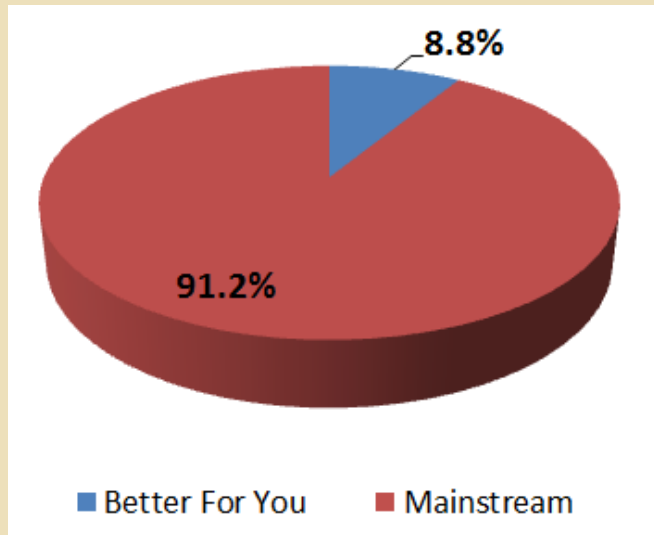
- Brand AD has the largest dollar share in the potato chip segment
- Four of the top selling potato chip brands are natural brands
- The brand with the highest growth is Nat Brand F
- Natural brands are fueling segment and category growth
- New product innovation and flavors are fueling natural product growth in the segment and the category

Dollar % Change



Healthy Segment Comparison

Better For You Salty Snacks

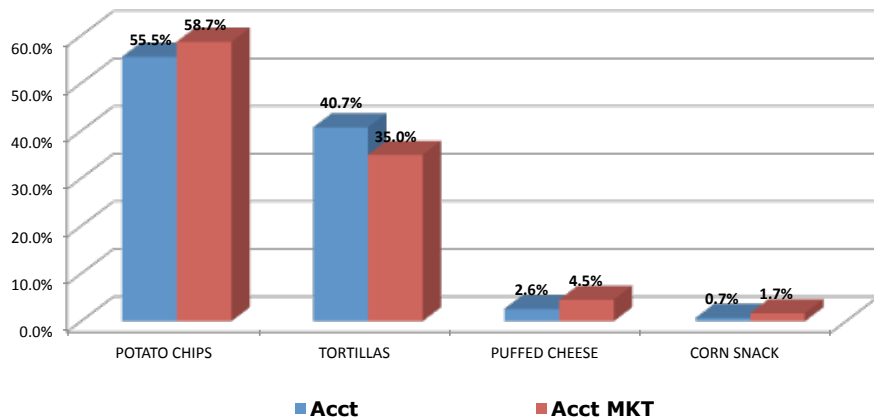


- Salty snack sales are both a planned and impulse purchase
- Mainstream brands account for 91.2% of salty snack sales in the account and 86.5% in the market
- Mainstream salty snacks are overdeveloped by \$370,692 in the account
- Better For You (BFY) is growing nearly twice (in dollars) as fast in the market
- There is a \$252,015 Better For You (natural brands) opportunity gap in the account
- BFY potato chips represent 6.8% of the salty snacks category in the market

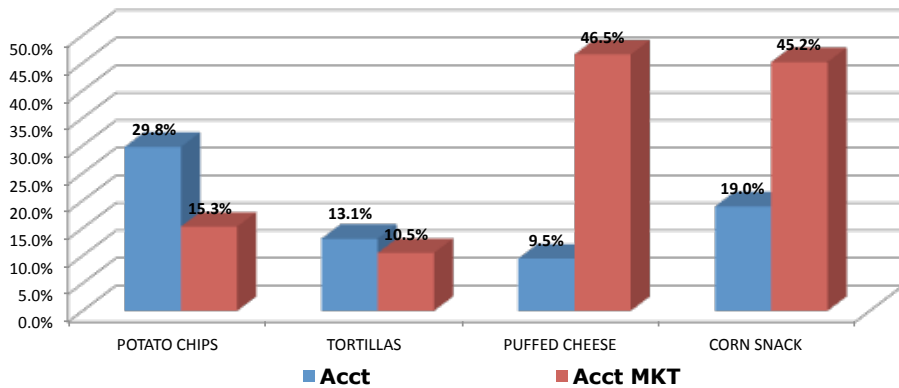
Better For You

Segment Overview

Dollar Share



Dollar % Change

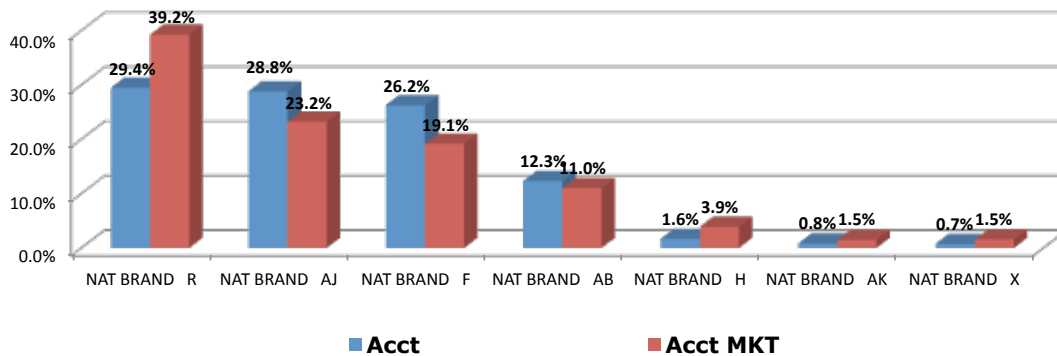


- Potato chips represent the largest segment of Better For You snacks, 55.5% in the account and 58.7% in the market
- Better For You potato chips are growing faster in the account (up +29.8%) than in the market (up +16.3%)
- There is a \$370,692 opportunity gap in Better For You Potato Chips
- Better For You salty snacks are underdeveloped and under merchandised in the account and in the market

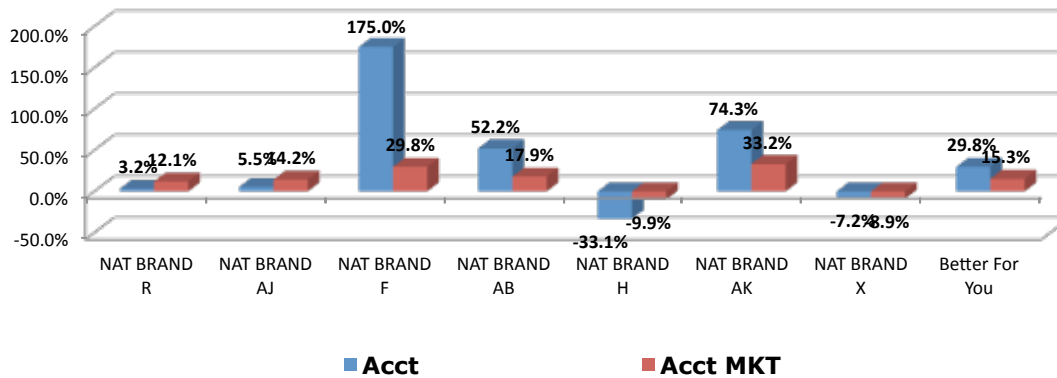
Brand Comparison

Better For You Potato Chips

Dollar Share



Dollar % Change

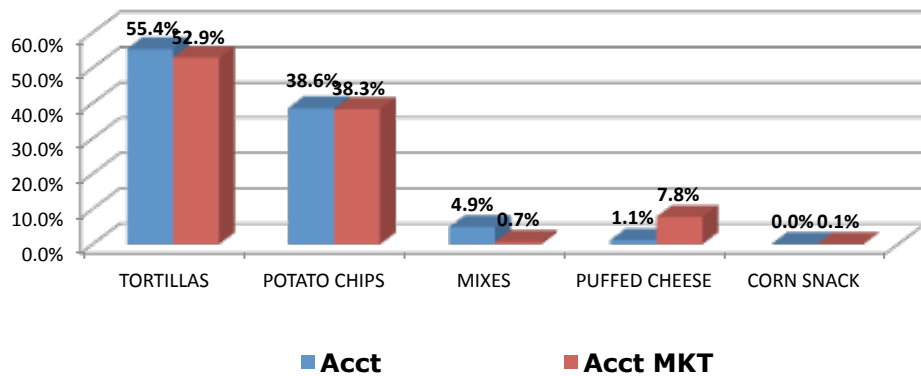


- Better For You Potato chip sales growth is higher in the account (up +29.8%) than in the market (up +15.3%)
- The most growth in the segment is coming from Nat Brand F (up +175%) in the account
- Nat Brand AB sales were up +52.5% in the account and +17.9% in the market
- Nat Brand AB has a gluten free (GF) product line

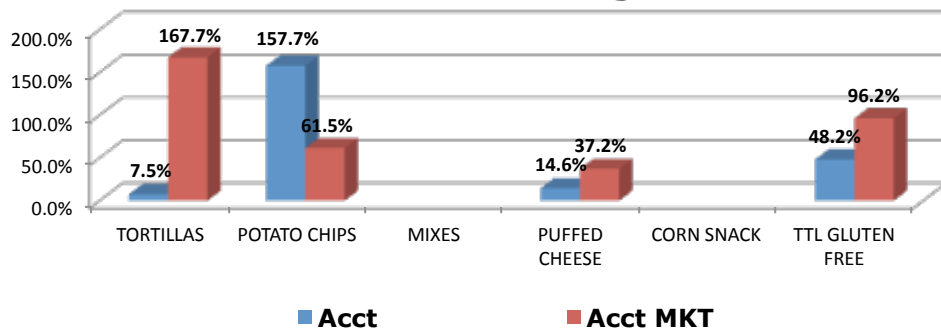
GF Brand Comparison

Better For You Segment Comparison

Dollar Sales



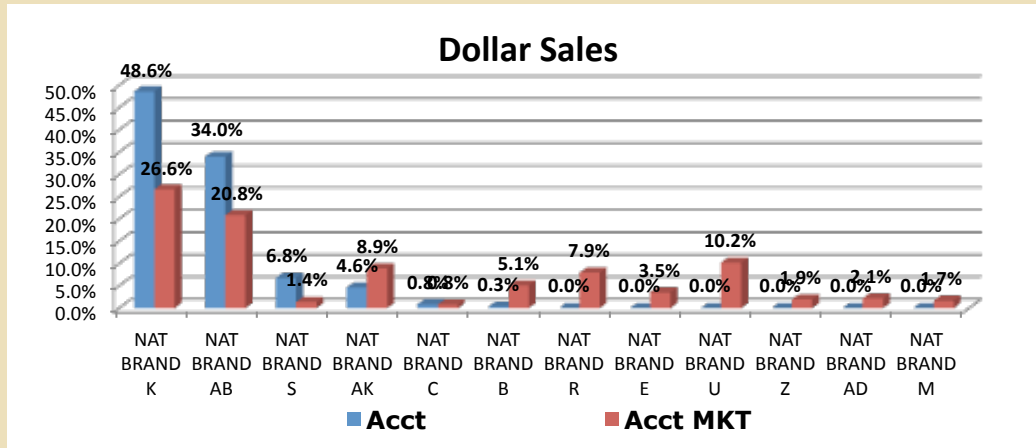
Dollar % Change



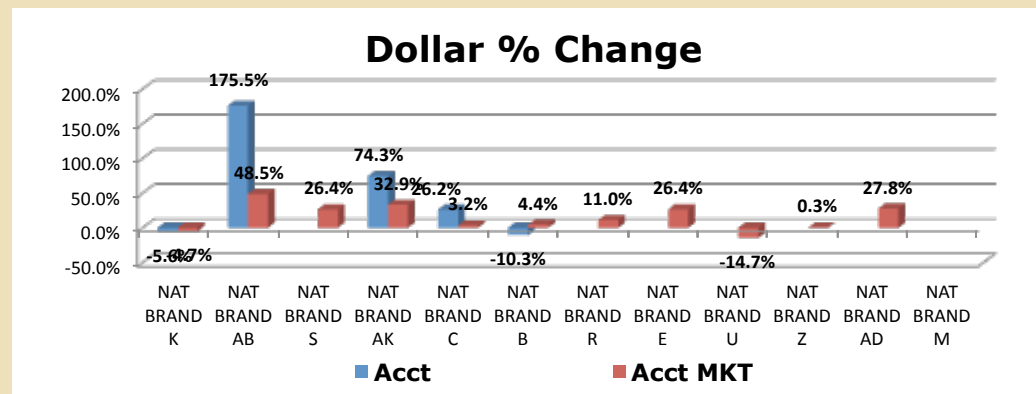
- Gluten free salty snacks are growing faster in the market, 96.2% compared to 48.2% in the account
- Gluten free Tortilla chips represent the largest segment in both the account and the market
- Gluten free potato chips have the highest growth in the account
- Gluten free potato chips has the highest segment dollar opportunity gap \$146,927

GF Brand Comparison

Better For You Salty Snacks

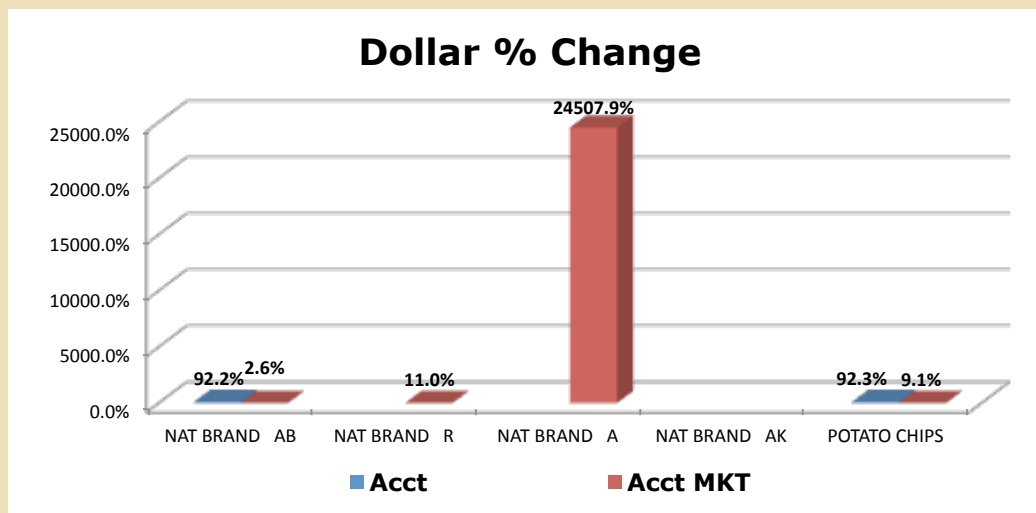
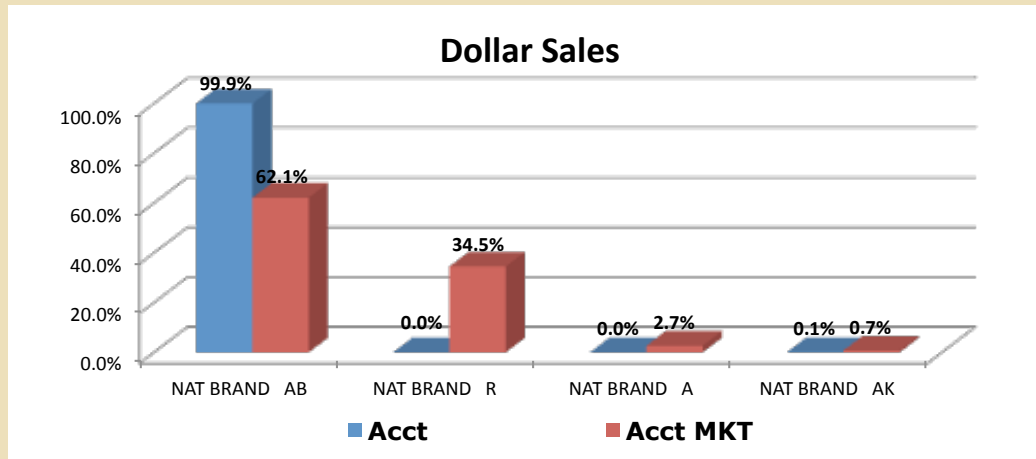


- The top selling gluten free brand is Nat Brand K
- Nat Brand K specializes in tortilla chips
- Nat Brand AB ranks #2 in the account and the market
- Nat Brand AB has the highest growth in the segment, up +175.5%
- Nat Brand AB is the sales leader in gluten free potato chips



GF Brand Comparison

Better For You Potato Chips



- Nat Brand AB has the highest share of potato chip sales in both the account and the market
- Gluten free potato chips grew +92.3% in the account compared to +9.1% in the market
- Nat Brand AB sales grew 92.2% in the account
- There are 19 items being sold in the market
- Nat Brand AB has 9 items for sale in the market
- All 9 items are available in the account
- Nat Brand A introduced two new items three months ago

Key Learnings

- Better For You salty snacks are fueling the growth in the salty snack category in both the account and the market
- Better For You salty snacks are under-merchandised in the account and in the market
- Potato and tortilla chips represent about 70% of total salty snack sales in both the account and the market
- Better For You Potato chips represent almost 60% of sales in the market - the largest opportunity for growth
- Gluten free salty snacks are growing faster in the market, +96.2% compared to +48.2% in the account
- Nat Brand K has the largest dollar share in the gluten free segment (48.6% in the account) but their sales are declining (down -5.6%)
 - Nat Brand K has a tortilla line
- Nat Brand AB has 9 potato chip items
- Their sales growth is +92.3% in the account
- Gluten free potato chips grew +92.3% in the account compared to +9.1% in the market