Healthy Snacking:
Opportunities for Alberta Food Processors

February 16, 2012

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Agenda

- Background
- Findings Preview
- How Do Alberta Residents & Families Snack?
- What role do health conscious behaviours & attitudes play?
- Executive Summary

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Background

Situation	• Research conducted by Alberta Agriculture and Rural Development indicates that snack meals represented 24% of all meals in Canada in 2009, compared to 22% in 2000. • Nielsen data has confirmed that snack food products are among the fastest growing category of foods in the grocery aisle, highlighting the growing contribution of snacking in the Canadian diet.
Complication	• While this holds the promise of growth and differentiation for Alberta businesses capable of leveraging the shift in demand, the impact these changes may be having on rates of childhood obesity are less well understood.
Questions	• What are the motivations behind this change in eating occasions? Insofar as to whether this will create opportunities for savvy food processors to develop new, healthy snack food products and differentiation strategies, thus increasing the competitiveness of Alberta agri-food industry • What relationship exists between snacking behaviour and childhood obesity in order to make recommendations to promote healthy living?

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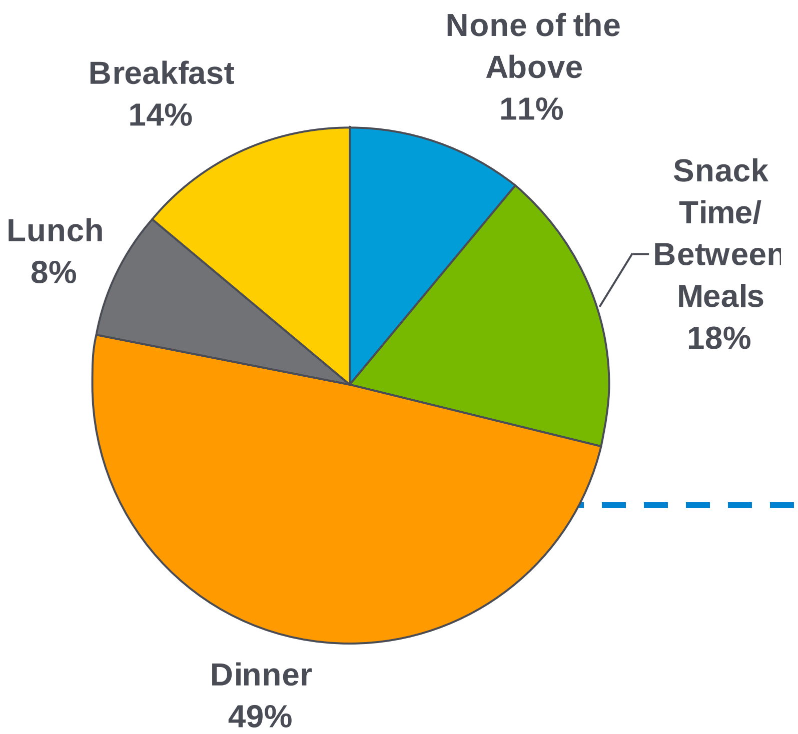
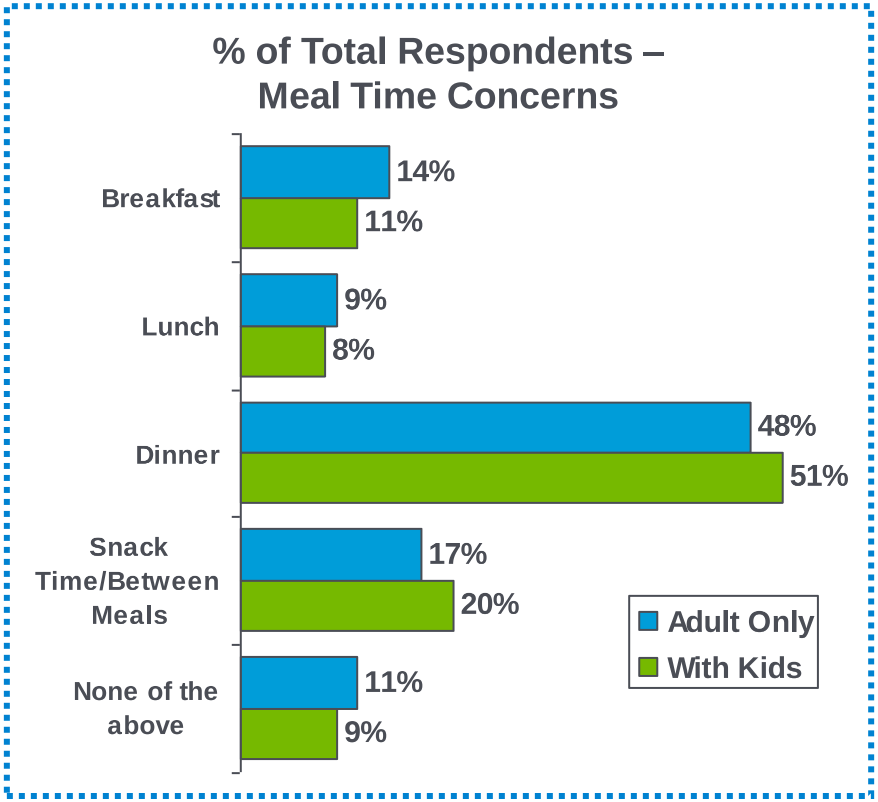
The importance of health and nutrition during snacking occasions is second only to dinner – also slightly higher in homes with children

At what meal time are you most concerned about eating healthy?





Base: Canadian Households, N = 13,233
Source: Nielsen PanelViews Health & Wellness Survey 2011

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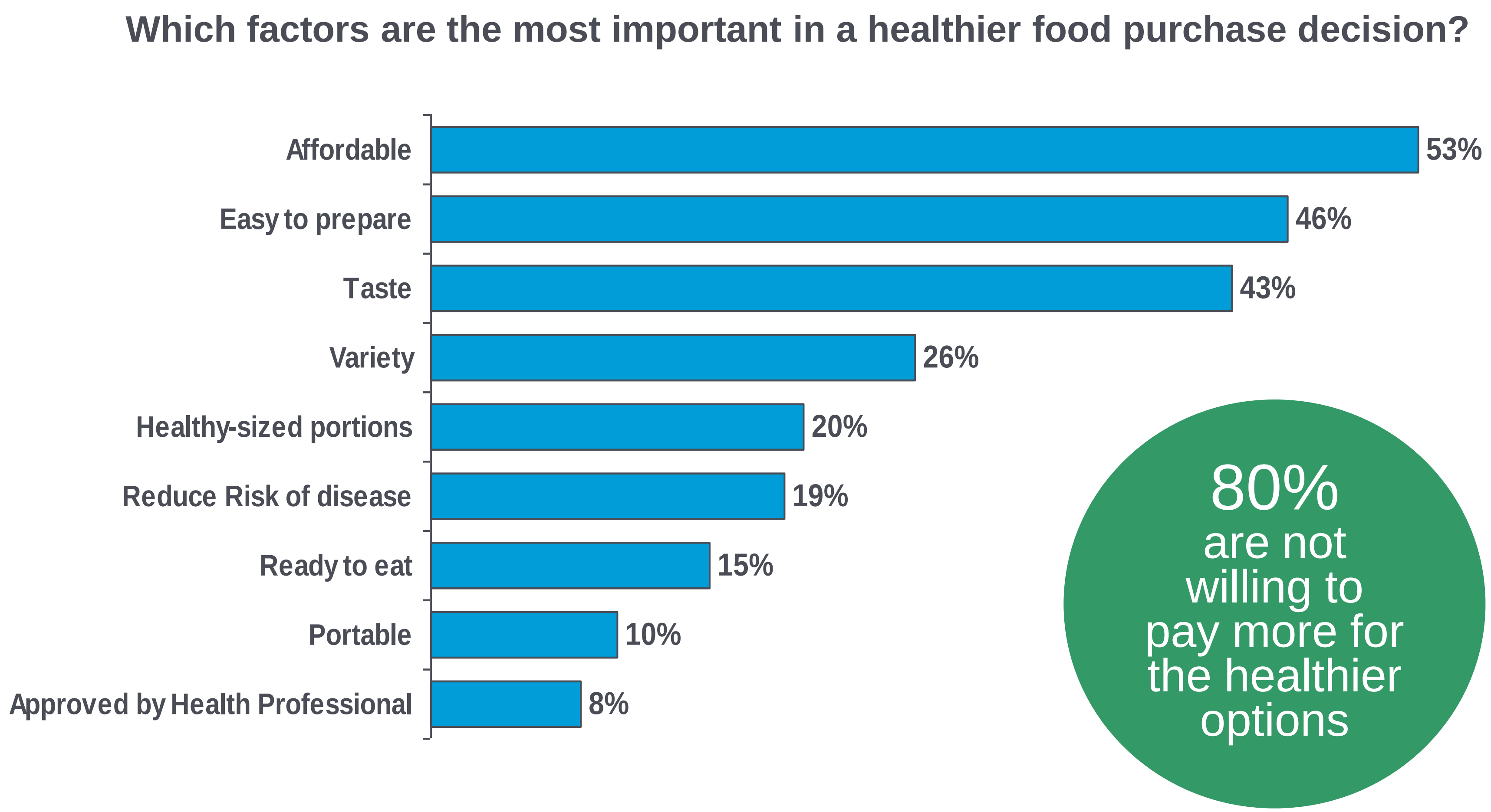
When it comes to healthy food, consumers want it all – affordability, convenience and taste



* Multiple Mentions
Source: Nielsen PanelViews Health & Wellness Survey 2010

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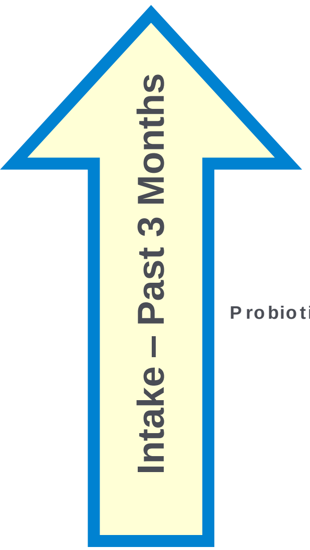
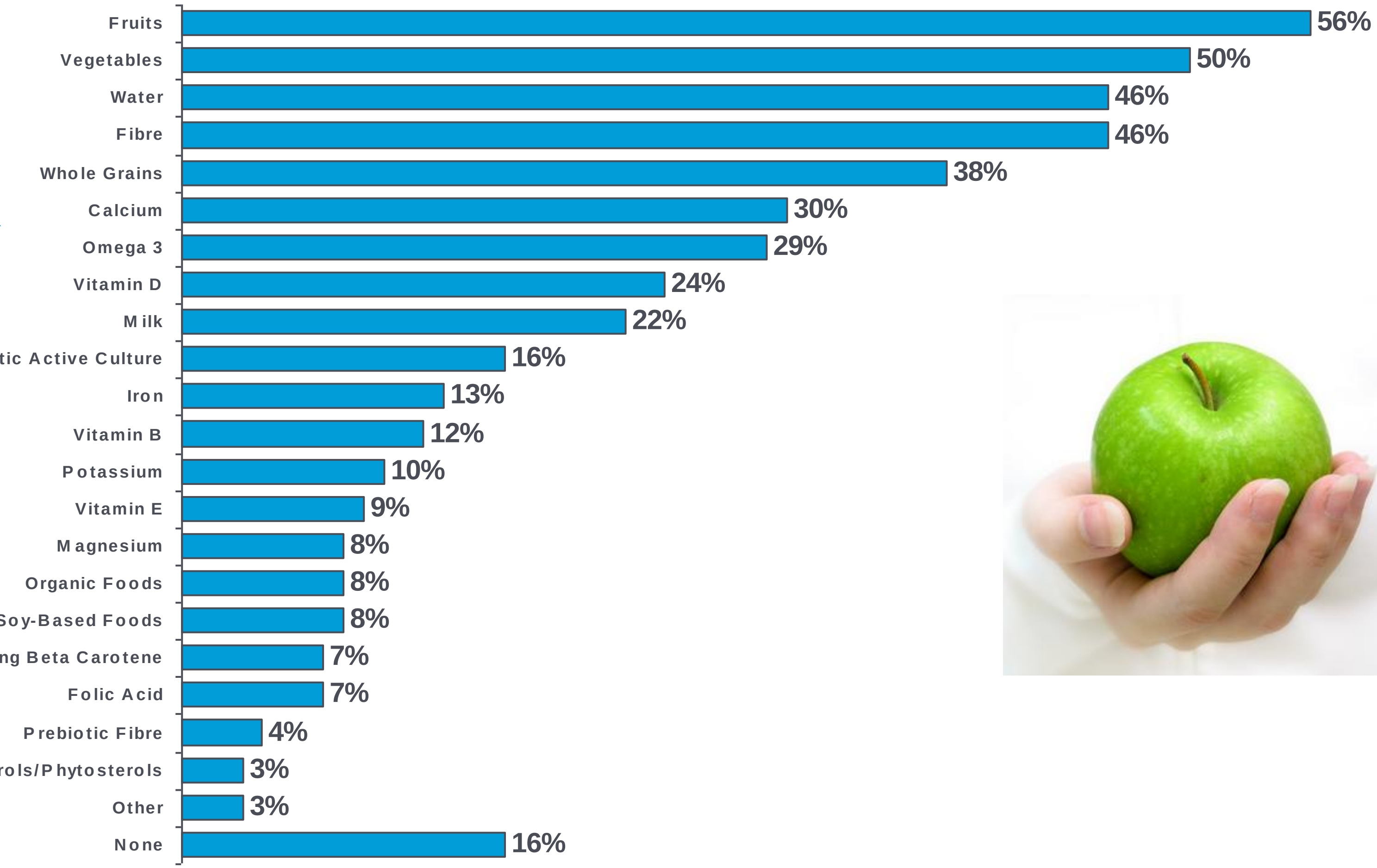
Fruits (+2 pts*) remains the most common item being consciously increased in diets, while vegetables (+2 pts) have replaced fibre (-4 pts) as the second most common item

Which, if any, of the following are you consciously trying to incorporate into your diet or increase your intake of during the past 3 months?**





Base: Canadian Households, N = 13,233 | * vs. Year Prior; ** Multiple Mentions | Source: Nielsen PanelViews Health & Wellness Survey 2011

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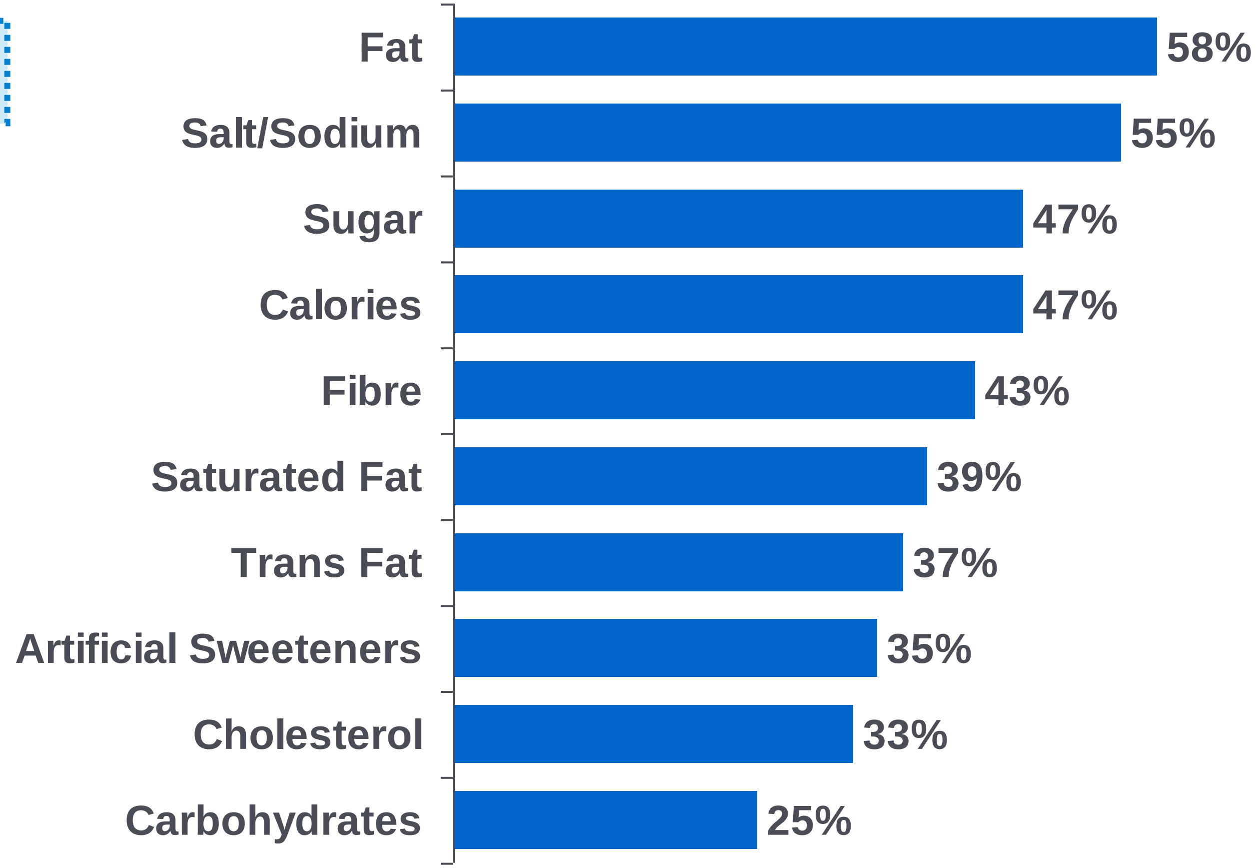
Although Canadians look at product labels primarily for ‘unhealthy’ ingredients, fibre is the most sought after ‘healthy’ ingredient

When reading product labels, which of the following factors do you look for?

TOP 10



Source: Nielsen PanelViews Health & Wellness Survey 2010

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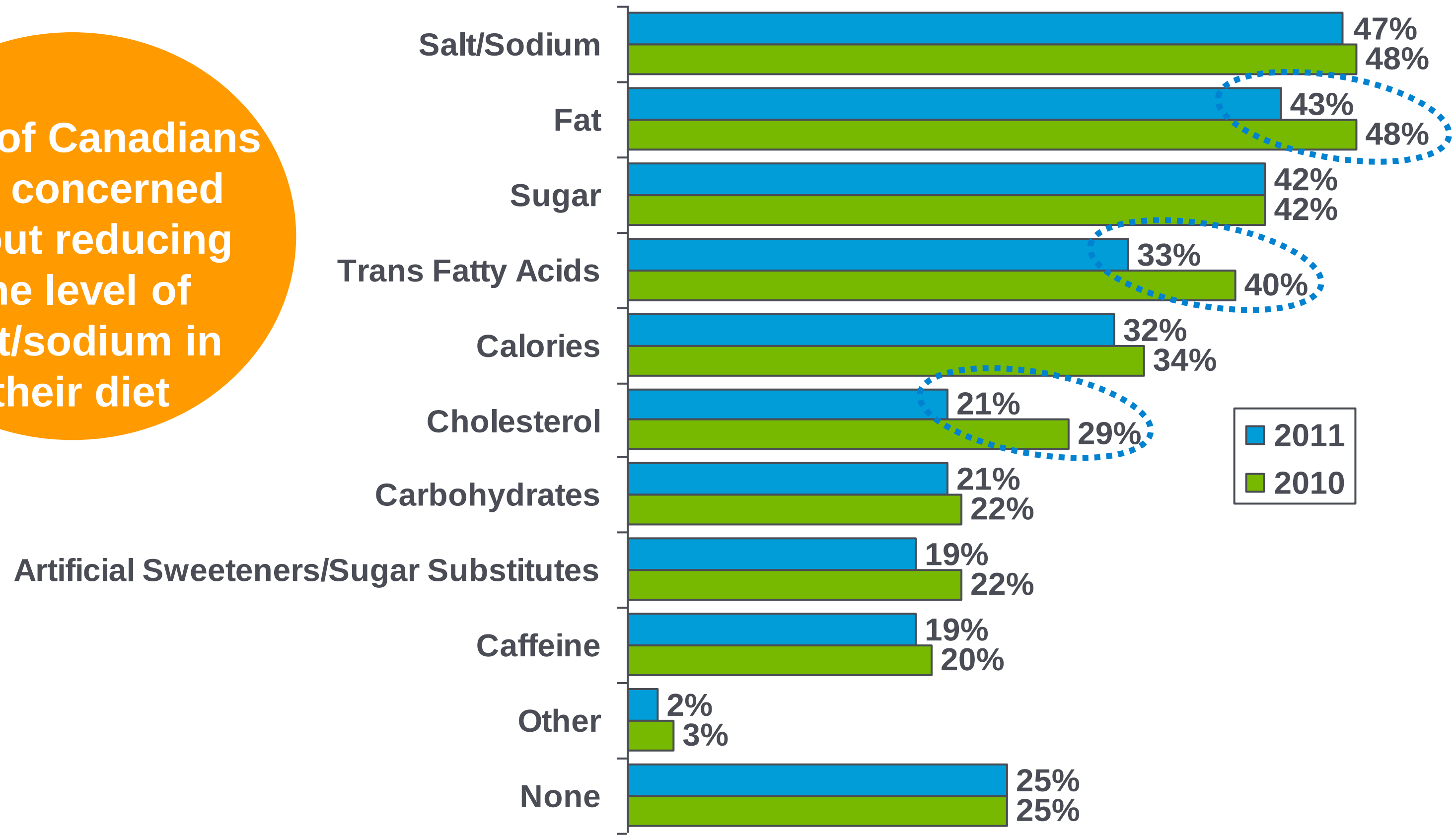
Reducing salt/sodium and fat remain the top concerns for Canadians

- However, fewer consumers are making efforts to reduce fat, trans fat and cholesterol in their diets in 2011 versus 2010

Which of the following food items, if any, have you, yourself, been reducing the intake of during the past 3 months?*

47% of Canadians are concerned about reducing the level of salt/sodium in their diet



Base: Canadian Households, N = 13,233 | * Multiple Mentions | Source: Nielsen PanelViews Health & Wellness Survey 2011

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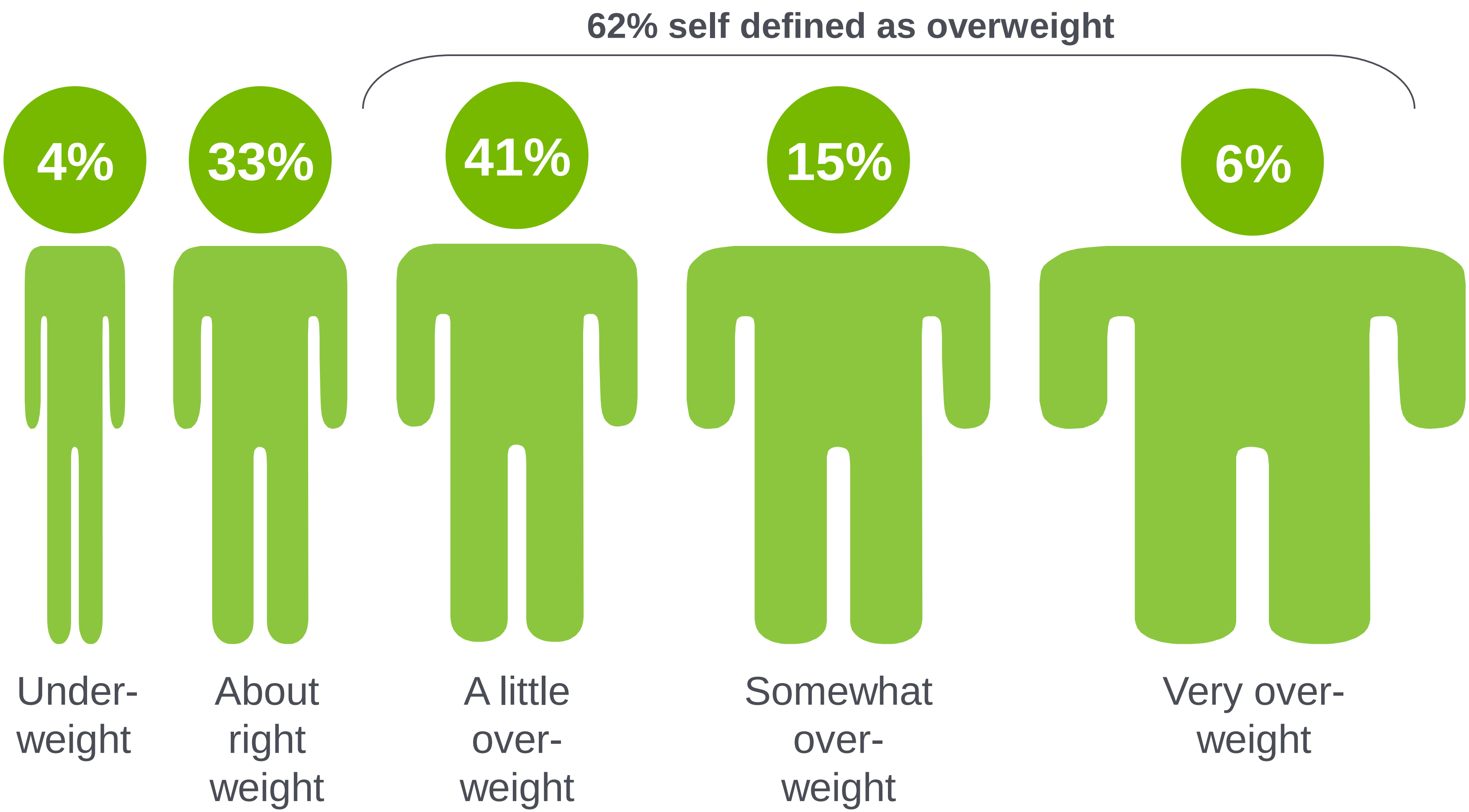
Over 60% of Canadians consider themselves overweight – similar to Global and US results



Source: Nielsen Global Omnibus Survey - Canada - September 2011

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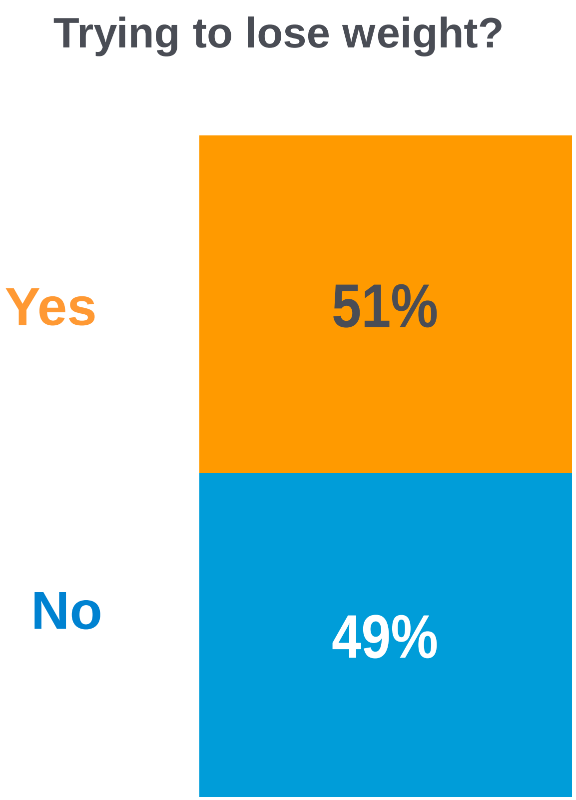
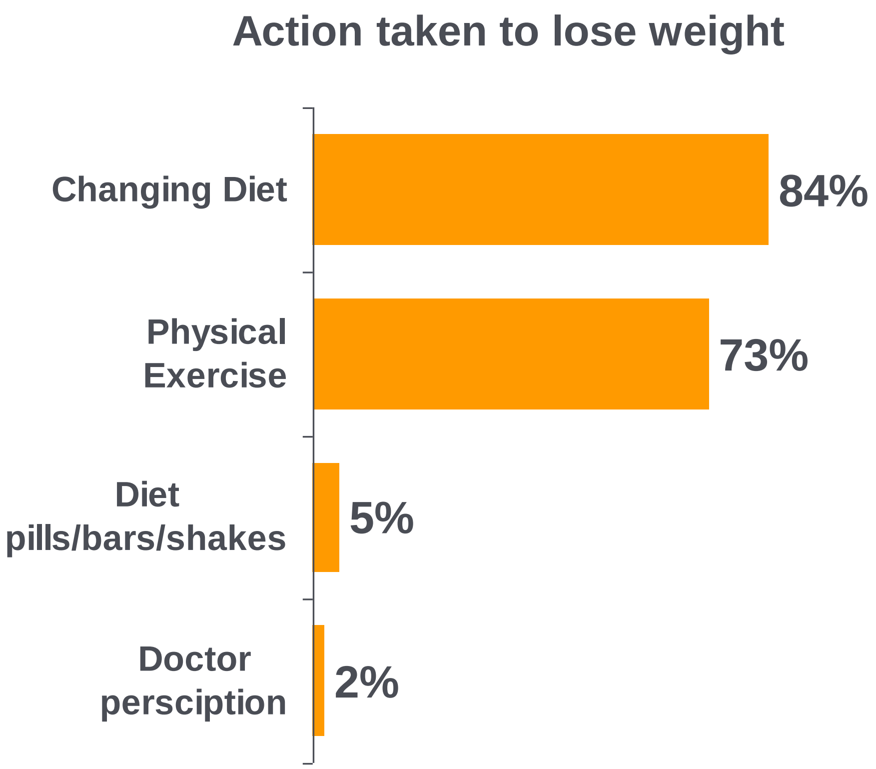
Half of Canadians are trying to lose weight, chiefly by changing their diet and exercising more

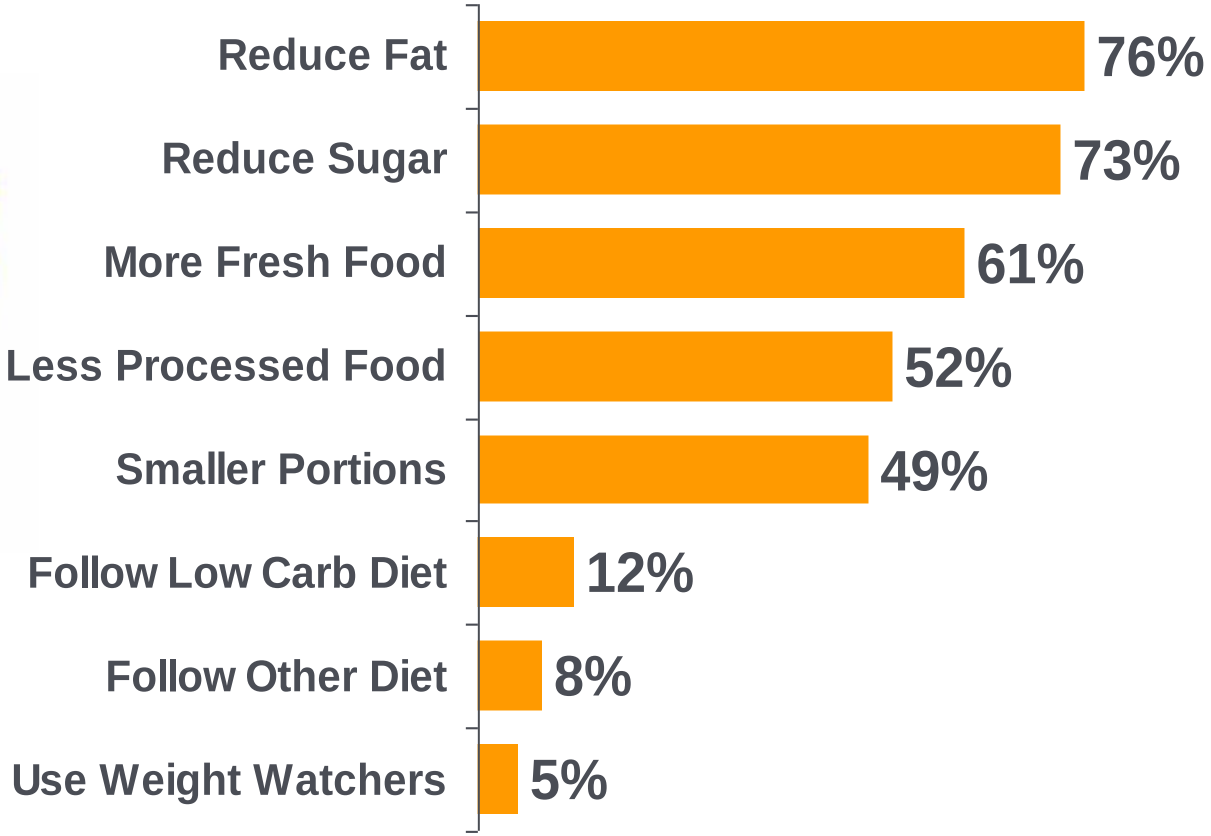




Source: Nielsen Global Omnibus Survey - Canada – September 2011

When it comes to changing ones' diet to lose weight, reducing fat and sugar top the list

How are Canadians changing their diet to lose weight?



Source: Nielsen Global Omnibus Survey - Canada – September 2011

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Agenda

Background

Findings Preview

How Do Alberta Residents & Families Snack?

What role do health conscious behaviours & attitudes play?

Executive Summary

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Findings Preview

Understanding Snacking Behaviour

- Parents predominantly purchase ‘healthier’ snack options, but also gravitate towards ‘Salty Snacks’
- Snack purchases are largely driven by ‘Health’ and ‘Satisfaction’, while ‘Convenience’ is a cost of entry
- Snacking is initially looked upon as a regimented snack/break or routine of habit among children 2-5, however as kids age, enjoyment becomes the main catalyst

Health Conscious Attitudes & Actions

- Those who check ingredients are very much more likely to be purchasers of ‘healthier’ snack options
- A large proportion of those who do not look at ingredients view snacks in general as unhealthy, but still are stuck in their ways
- Manufacturers should look to ways to help consumers be more aware of what’s in their snack to help with healthier decisions
- Consumers are looking for several different aspects in an “ultimate” snack food

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All age groups are likely to snack, with Children 6-12 just as likely to consume snacks as their parents (Adults 35-54)

Including yourself, who in your household eats snack foods (including healthy snacks like celery, cheese, etc), on a regular basis?

	Alberta Residents	
	Total	Parents Of Kids (2-17)
(Total Consumers)	*(258)*	*(110)*
	%	%
	A	B
Children Under 18 (Net)	**39**	**96**[A]
Children Under 2	8	13
Children 2-5	17	45[A]
Children 6-12	20	54[A]
Teenagers 13-17	15	38[A]
Adults 18-34 (Net)	**37**	**40**
Adult Males 18-34	28	26
Adult Females 18-34	26	33
Adults 35-54 (Net)	**53**	**69**[A]
Adult Males 35-54	33	55[A]
Adult Females 35-54	45	55
Adults 55 And Over (Net)	**31**[B]	**12**
Adult Males 55 And Over	21[B]	5
Adult Females 55 And Over	23[B]	8
No One In Household Eats Snacks On A Regular Basis	3	2

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B**

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The majority of Parents purchase "healthier" options, yet Salty Snacks are also a predominant choice for snacking…

Which of these products, if any, have you purchased in the past week?

	Alberta Residents	
	Total	Parents Of Kids (2-17)
(Total Consumers)	*(258)*	*(110)*
	%	%
	A	**B**
Vegetables	78	80
Fresh, Canned Or Dried Fruit	58	64
Salty Snacks (E.g. Chips, Crackers, Popcorn, Seeds Etc.)	54	66^{A}
Yogurt (Drinkable Or Spoonable) Or Single Serve Cheese	52	56
Candy (Including Mints And Gum) Or Chocolate Bars	43	45
Dips/Salsa	29	30
Bars (E.g. Breakfast, Granola Etc)	27	30
Sweet Baked Goods	22	21
Snack Or Dessert Cups	16	20
Frozen Confections	10	10
Jerky/Meat Snacks	8	7
Pre-Packaged Lunch Or Snack Kits	7	12
None	**3**	**2**

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B**

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…in particular, Chips are the primary Salty Snack purchased

What kinds of salty snacks (e.g. chips, crackers, popcorn, seeds etc.) have you purchased in the past week?

	Alberta Residents	
	Total	Parents Of Kids (2-17)
(Total Consumers)	*(258)*	*(110)*
	%	%
	A	B
Chips (Net)	**44**	**57**[A]
Chips - Potato Chips	31	44[A]
Chips - Tortilla Chips	21	31[A]
Chips - Multigrain Chips	7	11
Chips - Corn Chips	4	4
Crackers (Net)	**25**	**30**
Crackers - Other	21	22
Crackers - Sweet Crisps/Crackers	5	7
Crackers - Filled Or Sandwich Crackers	3	6
Popcorn (Net)	**21**	**30**[A]
Popcorn - Made Using In A Microwave	11	13
Popcorn - Made On A Stovetop Or Using A Popcorn Maker (Such As An Air Popper Or Electric Popper)	7	11
Popcorn - Read-To-Eat Popcorn	5	9
Nuts	10	7
Pretzels	7	12
Cheese Curls Or Puffs	5	5
Rice/Popcorn Cakes	4	5
Seeds	4	4
Snack Mix	3	4
Consumers Who Have Not Purchased Salty Snacks In The Past Week	**46**[B]	**34**

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B**

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Competitive Insights Analysis

- How does it work?
  - Respondents are asked which brands they most closely associate with certain attributes and which brands they would purchase.
  - A factor analysis is conducted on the list of attribute statements to determine the key, underlying dimensions relevant to the category.
  - Mean factor scores for each brand are compared giving relative strengths and weaknesses.
  - Regression analysis is used to determine the relative importance of each dimension on purchase interest.

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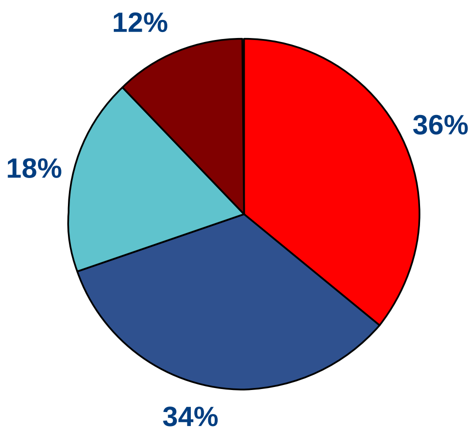
For Parents, ‘Convenience’ is a cost of entry for snack purchases, with ‘Health’ and ‘Satisfaction’ playing a larger influence

BASES® Competitive Insights Analysis - Key Snack Purchase Drivers

Parent Of Kids (2 - 17) - Alberta - All Snack Categories

Appeal
Is a good snack when you want to treat yourself
Is a good snack when you want to treat your family
Is fun for kids to eat
Is a snack that kids like
Is a good treat for kids

Convenience
Is easy for kids to prepare themselves
Is convenient to take with you on the go
Is quick to prepare
Is not messy to eat



Health
Is a healthy snack
Is a nutritious snack
Is a good choice for healthy eating
Is good for your health
Is a snack you feel good giving your child
Is a good everyday snack
Is worth paying more for

Satisfaction
Appeals to the entire household
Is a snack that adults like
Is satisfying
Is a reasonable price per serving

Snack Categories included are: Chips, Chocolate Bars, Yogurts, Canned Soups, Sandwiches, Pizzas, Pastas, Crackers, Candy, Fruits/Vegetables

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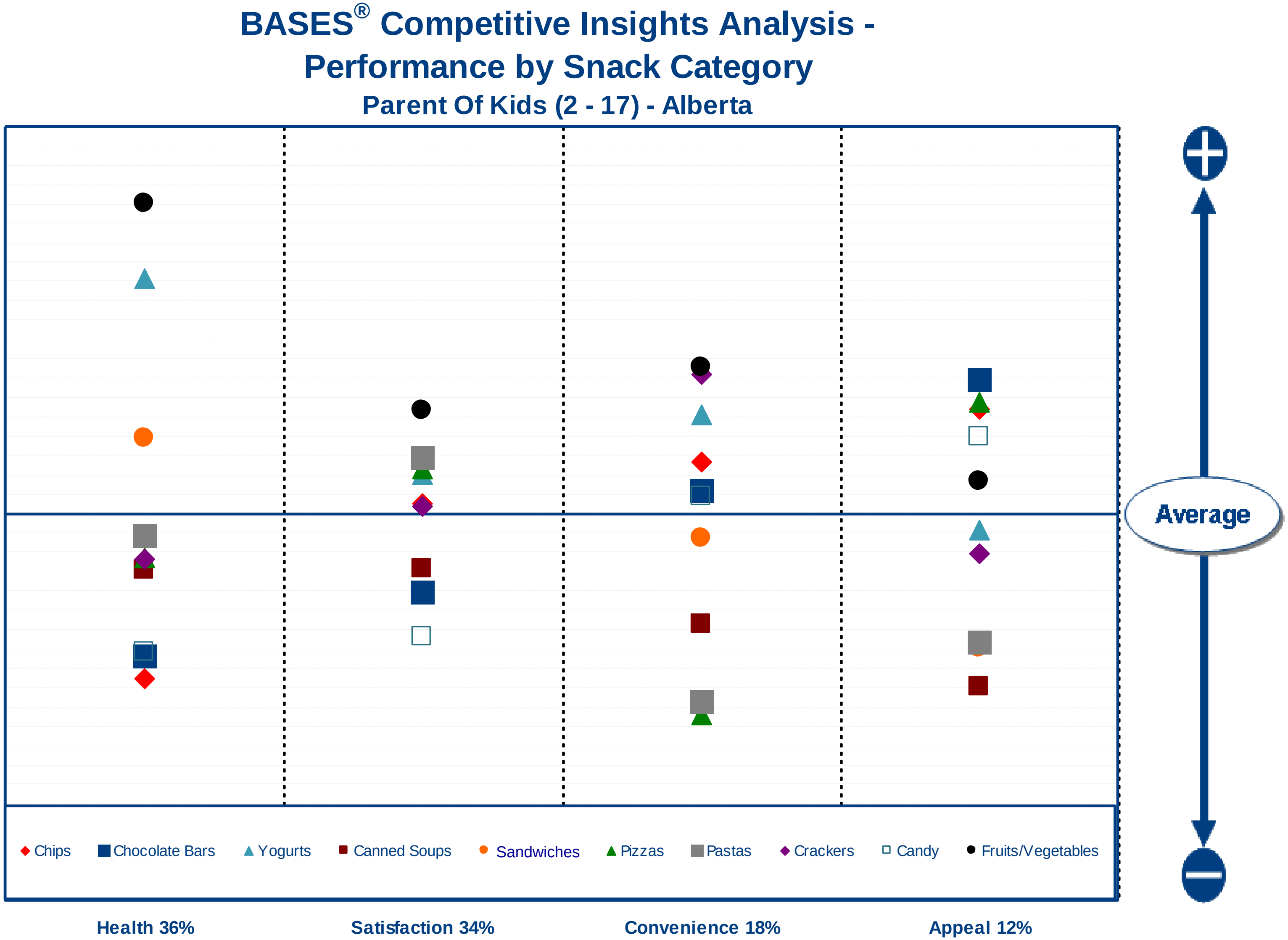
Fruits/Vegetables are strongly perceived vs. other snack categories



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Highest sales growth in Fresh Vegetables, Fruit and Yogurt

	Fresh Veg*	Fresh Fruit*	Salty Snacks	Yogurt	Candy
NATIONAL					
Penetration			96.2	90.9	81.9
Trips per Buyer			20.0	16.3	7.5
$ Vol % Chg	+6%	+6%	+3%	+5%	+1%
Units Vol % Chg			+0%	+3%	+0%
ALBERTA					
Penetration			97.2	90.1	86.8
Trips per Buyer			18.6	15.9	8.1
$ Vol % Chg	+5%	+7%	+4%	+5%	+1%
Units Vol % Chg			+2%	+3%	+2%

Source: Nielsen Homescan, All Outlet; National and Alberta; 52 Ending Nov 19 2011 vs. YA;
* *Source: Nielsen Fresh Track GB+DR+MM; National and Alberta; 52 Ending Nov 19 2011 vs. YA;*

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In these growing categories, appeal towards both Parents and Kids is equally as important in purchase decisions as general health perceptions

Strength of Association
Parent Of Kids (2 - 17) - Alberta

	Chips	Chocolate Bars	Yogurts	Canned Soups	Sandwiches	Pizzas	Pastas	Crackers	Candy	Fruits/Vegetables
Appeals to the entire household			-			+	+			
Is a good choice for healthy eating	-	-	+		+				-	+
Is a good everyday snack	-	-	+			-			-	+
Is a good snack when you want to treat your family	+	+	-		-	+			+	-
Is a good snack when you want to treat yourself	+	+		-	-				+	
Is a good treat for kids										
Is a healthy snack	-	-	+		+				-	+
Is a nutritious snack	-	-	+		+				-	+
Is a reasonable price per serving				+			+			
Is a snack that adults like	+		-							-
Is a snack that kids like	+	+			-				+	-
Is a snack you feel good giving your child	-	-	+						-	+
Is convenient to take with you on the go	+	+		-		-	-	+	+	
Is easy for kids to prepare themselves						-	-			
Is fun for kids to eat	+	+			-	+			+	-
Is good for your health	-	-	+		+		+		-	+
Is not messy to eat						-				
Is quick to prepare				+						
Is satisfying				+	+	+	+			
Is worth paying more for	-								-	+

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Unhealthy snacks serve as convenient treats for the entire family, however are not worth paying more for

Strength of Association
Parent Of Kids (2 - 17) - Alberta

	Fruits/Vegetables	Chips	Yogurts	Candy
Appeals to the entire household			-	
Is a good choice for healthy eating	+	-	+	-
Is a good everyday snack	+	-	+	-
Is a good snack when you want to treat your family	-	+	-	+
Is a good snack when you want to treat yourself		+		+
Is a good treat for kids				
Is a healthy snack	+	-	+	-
Is a nutritious snack	+	-	+	-
Is a reasonable price per serving				
Is a snack that adults like	-	+	-	
Is a snack that kids like	-	+		+
Is a snack you feel good giving your child	+	-	+	-
Is convenient to take with you on the go		+		+
Is easy for kids to prepare themselves				
Is fun for kids to eat	-	+		+
Is good for your health	+	-	+	-
Is not messy to eat				
Is quick to prepare				
Is satisfying				
Is worth paying more for	+	-		-

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Chips are mainly bought for Children 6-12, while crackers purchases skew towards Children under 12

[…] for whom in your household did you buy salty snacks?

	Alberta Residents		
	Parents Of Kids (2-17)		
	Children 2-5	Children 6-12	Teenagers 13-17
(Consumers Who Have Purchased Salty Snacks In The Past Week And Who Have […] In Their Household)	*(34)**	*(47)**	*(32)**
	%	%	%
	A	B	C
Chips (Net)	50	81 A	66
Chips - Potato Chips	32	66 AC	44
Chips - Tortilla Chips	26	38	44
Chips - Multigrain Chips	9	4	9
Chips - Corn Chips	-	2	9
Crackers (Net)	41	45 C	22
Crackers - Other	26	32	19
Crackers - Sweet Crisps/Crackers	15	11	3
Crackers - Filled Or Sandwich Crackers	3	9	6
Popcorn (Net)	35	40	38
Popcorn - Made On A Stovetop Or Using A Popcorn Maker (Such As An Air Popper Or Electric Popper)	21	13	13
Popcorn - Read-To-Eat Popcorn	12	6	6
Popcorn - Made Using In A Microwave	6	26 A	22
Cheese Curls Or Puffs	9	6	3
Pretzels	9	11	19
Rice/Popcorn Cakes	6	4	3
Snack Mix	-	4	6
Trail Mix	-	2	3
Nuts	-	2	3
Did Not Buy Salty Snacks For This Person	24	11	9

"I don't eat as much junk food [as I used to]. I just don't like it as much. I ate too much then, so I don't like it anymore."

(Teen from Focus Group)

* Caution small base size.
Columns (PROPORTIONAL) tested at the 90% confidence level - A/B/C

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Fresh fruit is least likely to be purchased for Adult Males 35-54…

[…] for whom in your household did you buy fresh, canned or dried fruit?

	Alberta Residents					
	Males 18-34	**Females 18-34**	**Males 35-54**	**Females 35-54**	**Males 55+**	**Females 55+**
(Consumers Who Have Purchased Fresh, Canned Or Dried Fruit The Past Week And Who Have Adult Males 18-34 In Their Household)	*(49)**	*(49)**	*(54)*	*(73)*	*(38)**	*(39)**
	%	%	%	%	%	%
	A	**B**	**C**	**D**	**E**	**F**
Fresh Fruit	88	96 C	74	89 C	95 C	92 C
Canned Single Serve Fruit	12	8	11	12	8	5
Fruit Snacks/Rolls/Bites	6	4	4	4	3	-
Dried Fruits	2	10	11	11	5	5
Did Not Buy Fresh, Canned Or Dried Fruit For This	12	4	19 BD	5	5	8

* Caution small base size.
Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B/C/D/E/F**

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…additionally, yogurt purchases heavily skew female

[…] for whom in your household did you buy yogurt & single serve cheese?

	Alberta Residents					
	Males 18-34	Females 18-34	Males 35-54	Females 35-54	Males 55+	Females 55+
(Consumers Who Have Purchased Yogurt & Single Serve Cheese The Past Week And Who Have Adult […] In Their Household)	(43)*	(44)*	(47)*	(66)	(34)*	(34)*
	%	%	%	%	%	%
	A	B	C	D	E	F
Yogurt (Net)	58	75[C]	55	86[ACE]	68	94[ABCE]
Spoonable Yogurt	58	64	53	82[ABC]	65	88[ABCE]
Drinkable Yogurt	7	16	4	14	9	9
Cheese (Net)	9	9	4	6	9	3
String/Pre-Packaged Cheese	9	9	4	5	6	3
Single Serve Cottage Cheese Cups	-	-	-	2	3	-
Did Not Buy Yogurt (Drinkable Or Spoonable) Or Single Serve Cheese For This Person	37[DF]	25[F]	45[BDF]	14	32[DF]	6

* Caution small base size.
Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B/C/D/E/F**

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Fresh fruits or vegetables is most preferred amongst individuals as well as children

In general, what type of snack foods do you or your children prefer to eat?

	Alberta Residents	
	Total	Parents Of Kids (2-17)
(Total Consumers)	*(258)*	*(110)*
	%	%
	A	**B**
Fresh (Fruits Or Vegetables)	43	44
Salty	29	26
Sweet	16	17
Cheesy	7	10
Other Mentions	4	2

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B**

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Early on, snacking behaviour looks to be catered towards a routine of habit or for a break

- However, as kids get older enjoyment becomes the main catalyst towards snacking

[…] what are the reasons that best describes why you choose snack foods for members of your household?

	Alberta Residents		
	Parents Of Kids (2-17)		
	Children 2-5	Children 6-12	Teenagers 13-17
(Consumers With […] In Their Household Who Eat Snacks)	(52)	(64)	(43)*
	%	%	%
	A	B	C
Light Snack Or Break	81C	67	63
Enjoyment	56	56	70
Convenience	48	39	44
A Routine Or Habit	38	28	30
Sharing	21	19	9
Health Or Weight Control	19	9	12
Indulgence	10	16	23
Meal Replacement	10	6	5
Oral Health	8	5	5
Other	4	5	2

"Advertising makes kids hungry. I have tried to tell them to eat when they are hungry, not when you see eating and want what's on TV."

(Parent from Focus Group)

* Caution small base size.
Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B/C**

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Males 18-34 look to snacking out of convenience, while females perceive snacking as more of an indulgence as well as a means for health or weight control

Adult […] what are the reasons that best describes why you choose snack foods for members of your household?

	Alberta Residents					
	Males 18-34	Females 18-34	Males 35-54	Females 35-54	Males 55+	Females 55+
(Consumers With Adult […] In Their Household Who Eat Snacks)	*(75)*	*(70)*	*(92)*	*(123)*	*(62)*	*(65)*
	%	%	%	%	%	%
	A	**B**	**C**	**D**	**E**	**F**
Enjoyment	59	60	59	63	65	54
Light Snack Or Break	55	64 F	53	53	53	42
Convenience	51 CDEF	40 F	32	36 F	26	20
Indulgence	36	46 EF	36 F	38 F	29	22
Health Or Weight Control	25	36 C	14	26 C	23	29 C
A Routine Or Habit	24	24	25	24	26	23
Meal Replacement	12	13	9	16	11	8
Sharing	8	11	10	13	10	5
Oral Health	4	4	2	1	6	6
Other	3	1	2	2	3	6

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B/C/D/E/F**

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Water consumption in tandem with snacks trends down as children age, while carbonated beverage consumption rises

[…] what kinds of beverages do you or other members of your household consume while snacking?

	Alberta Residents		
	Parents Of Kids (2-17)		
	Children 2-5	Children 6-12	Teenagers 13-17
(Consumers With […] In Their Household Who Consume Beverages While Snacking)	(44)*	(53)	(40)*
	%	%	%
	A	B	C
Water (Bottled Water Or Tap)	86 C	72	65
Milk	75	75	60
Fruit/Vegetable Juice	55	62	43
Fruit Drink	23	34	33
Soft Drinks	14	34 A	53 A
Smoothie	11	23	30 A
Frozen Slushy	7	19	23 A
Coffee	2	2	5
Sports Drink	2	11	30 AB
Tea	2	6	13
Other	2	4	3

* Caution small base size.
Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B/C**

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Men have a habit of drinking soft drinks more often, further increasing the presence of less healthier options within households

Adult […] what kinds of beverages do you or other members of your household consume while snacking?

	Alberta Residents					
	Males 18-34	Females 18-34	Males 35-54	Females 35-54	Males 55+	Females 55+
(Consumers With Adult […] In Their Household Who Consume Beverages While Snacking)	(63)	(60)	(78)	(107)	(52)	(52)
	%	%	%	%	%	%
	A	B	C	D	E	F
Water (Bottled Water Or Tap)	68 E	77 CEF	55	64	50	58
Soft Drinks	59 BDEF	38	50 DF	36	35	29
Coffee	38	42	49	40	33	44
Fruit/Vegetable Juice	27	33 F	22	21	21	13
Milk	25	28 EF	24	21	13	12
Alcoholic Beverage	21	15	29 B	19	21	21
Tea	21	43 ACE	26	40 ACE	19	46 ACE
Fruit Drink	14	12	10	11	19	15
Smoothie	10	13	9	11	4	10
Sports Drink	6	7 D	8 D	1	-	-
Frozen Slushy	5	12 D	10 D	1	-	4
Other	2	2	1	1	4	2

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B/C/D/E/F**

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While the majority of Parents view snacks as both Healthy and Unhealthy, they are also slightly less likely to look at ingredients when buying snacks

When thinking about snacks, do you generally think of them as healthy or unhealthy?

	Alberta Residents	
	Total	Parents Of Kids (2-17)
(Total Consumers)	*(258)*	*(110)*
	%	%
	A	B
More Often Healthy	28	26
Healthy And Unhealthy Equally	48	51
More Often Unhealthy	24	23

Do you usually look at the ingredients list when you are buying snacks?

	Alberta Residents	
	Total	Parents Of Kids (2-17)
(Consumers Who Buy Snack Food)	*(257)*	*(110)*
	%	%
	A	B
Yes	72	66
No	28	34

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B**

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Concerns surrounding the impact to ones' health is the underlying cause for looking at ingredients

Why do you look for the ingredients that you just specified?

	Alberta Residents	
	Total	Parents Of Kids (2-17)
(Consumers Who Look At The Ingredients List When They Are Buying Snacks)	(184)	(73)
	%	%
	A	B
Health/Nutrition (Net)	**83**	**85**
General Health/Nutrition (Sub-Net)	**66**	**58**
Not Healthy/Nutritious/Good For You	36	40
High In Fat	9	3
Not Good For Dieting/Weight Management	9	3
Causes Allergic Reaction	4	5
High In Calories/Fattening	4	3
Not Good For Diabetics	3	0
High In Cholesterol	2	3
Other General Health/Nutrition Comments	3	1
Healthy Ingredients (Sub-Net)	**30**	**33**
General Healthy Ingredients (Sub-Sub-Net)	**28**	**29**
High In Sodium	13	11
Not Natural/Contains Artificial Ingredients	11	15
Low In Fiber	4	4
Dislike/Contains Grains	2	3
Sugar/Sweetener (Sub-Sub-Net)	**10**	**12**
High In Sugar	8	10
Dislike/Contains High Fructose Corn Syrup	1	3
Taste/Flavor (Net)	**15**	**7**
Ingredients (Sub-Net)	**12**	**7**
General Ingredients (Sub-Sub-Net)	**10**	**5**
Dislike Ingredients	9	5
General Taste/Flavor (Sub-Net)	**3**	**0**
Dislike Taste/Flavor	3	0
Uses (Net)	**3**	**1**
Miscellaneous (Net)	**4**	**5**
Not Enough Product Information	4	5
Don't Know	**3**	**1**

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B**

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More specifically, Parents are mainly concerned with the Sugar content, the inclusion of artificial ingredients, fat and sodium content

What specific ingredients do you look for?

	Alberta Residents	
	Total	Parents Of Kids (2-17)
(Consumers Who Look At The Ingredients List When They Are Buying Snacks)	*(184)*	*(73)*
	%	%
	A	B
Health/Nutrition (Net)	**93**	**96**
Healthy Ingredients (Sub-Net)	**84**	**90**
General Healthy Ingredients (Sub-Sub-Net)	**73**	**77**
Sodium Content	37	33
Natural/Not Contains Artificial Ingredients	32	40
Fiber Content	11	10
Contains Grains	10	14
Protein Content	5	1
Contains Hydrogenated Oil	4	5
Msg Content	4	4
Contains Vitamins	3	1
Other General Healthy Ingredients Comments	3	3
Sugar/Sweetener (Sub-Sub-Net)	**45**	**52**
Sugar Content	38	47
Fructose Corn Syrup Content	4	5
Added Sugar Content	4	4
Glucose Content	2	3
Other Sugar/Sweetener Comments	1	3
General Health/Nutrition (Sub-Net)	**51**	**42**
Fat Content	39	30
Calories Content	18	10
Carbohydrates Content	7	4
Not Cause Allergic Reaction	3	5
Cholesterol Content	3	0
Taste/Flavor (Net)	**18**	**19**
Ingredients (Sub-Net)	**18**	**18**
General Ingredients (Sub-Sub-Net)	**9**	**8**
The Ingredients	3	3
Vegetables	2	3
Milk/Dairy	1	3
Other General Ingredients Comments	4	1
Nuts (Sub-Sub-Net)	**8**	**7**
Nuts	5	4
Peanuts	2	3
Fruit/Fruit Juice (Sub-Sub-Net)	**5**	**7**
Fruit/Fruit Juice	4	7
General Taste/Flavor (Sub-Net)	**2**	**3**
Freshness	2	3

Columns (PROPORTIONAL) tested at the 90% confidence level - A/B

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Those who do not read ingredients view snacks as junk foods/indulgences which are expected to be unhealthy

Why don't you look at the ingredients?

	Alberta Residents	
	Total	Parents Of Kids (2-17)
(Consumers Who Don't Look At The Ingredients List When They Are Buying Snacks)	(73)	(37)*
	%	%
	A	B
Negative Overall (Net)	**67**	**62**
Health/Nutrition (Net)	**36**	**35**
General Health/Nutrition (Sub-Net)	**32**	**27**
Not Healthy/Nutritious/Good For You	22	22
High In Calories/Fattening	8	5
Healthy Ingredients (Sub-Net)	**7**	**8**
General Healthy Ingredients (Sub-Sub-Net)	**4**	**5**
Not Natural/Contains Artificial Ingredients	4	5
Sugar/Sweetener (Sub-Sub-Net)	**3**	**3**
High In Sugar	3	3
Ease/Convenience (Net)	**14**	**11**
General Ease/Convenience (Sub-Net)	**14**	**11**
Do Not Have Time To Read	11	11
Taste/Flavor (Net)	**5**	**0**
Prefer Fresh Fruit/Vegetables	4	0
Uses (Net)	**4**	**5**
It Is A Snack	4	5
It Is A Treat	1	3
Package/Container (Net)	**3**	**0**
General Package/Container (Sub-Net)	**3**	**0**
Miscellaneous (Net)	**14**	**16**
Satisfied With Present Brand/Method	10	14
Not Enough Product Information	3	3
Not New/Different/Similar To Others	1	3
No Reason	14	16
Don't Know	**3**	**3**

"My snacks are generally indulgences. I know that they're not going to be the healthiest choices so I don't generally look at ingredients unless I'm comparing two similar products."

"Snacks are typically purchased for enjoyment rather than healthy consumption."

* Caution small base size.
Columns (PROPORTIONAL) tested at the 90% confidence level - A/B

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Boldly calling out natural ingredients on packaging will be impactful in helping to catch the attention of Parents

Summary Of Means - Importance Of Nutritional Information

	Alberta Residents	
	Total	Parents Of Kids (2-17)
(Consumers Who Usually Look At The Nutritional Label When Buying Snacks)	*(173)* A	*(74)* B
No Trans Fat /0 Trans Fat	16.7	15.4
All Natural/Natural Ingredients	16.3	17.7[A]
High In Fibre	16.1	15.4
100% Whole Grain	15.8	17.3[A]
No Sugar Added /Unsweetened	15.6	16.2
Made With Whole Grain	15.4	16.3
Made With Real Fruit	14.8	17.0[A]
Low Sugar/Reduced Sugar	14.8	14.7
Reduced Salt/Low Sodium	14.8	13.7
Low Fat	13.7[B]	11.6
No Artificial Flavours	13.6	15.4[A]
Reduced Fat	13.1[B]	11.1
No Artificial Colours	12.9	14.3
Fat-Free/Non-Fat	12.9[B]	10.4
Reduced Or Low Calorie	12.7[B]	10.4
Unsalted /"No Salt"	12.4	11.3
Sugar Free/Sugarless	12.1	11.3
Vitamin Fortified/Enriched	10.8	11.0
Organic/Made With Organic Ingredients	10.5	11.4
Calcium Fortified/Enriched	10.5	11.2
Light, Diet	8.9[B]	7.4
Allergen-Free	5.6	6.9[A]
Gluten Free	5.2	5.9
Peanut Free	5.0	6.9[A]

Columns (MEAN) tested at the 90% confidence level - **A/B**

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Health perceptions remain consistent from a year prior

Compared to one year ago, how would you say your health is now? Would you say that it was ...?

	Alberta Residents	
	Total	Parents Of Kids (2-17)
(Total Consumers)	*(258)*	*(110)*
	%	%
	A	**B**
Top-Two Box (Net)	**29**	**29**
+5 Much Better Now Than One Year Ago	8	7
+4 Somewhat Better Now Than One Year Ago	21	22
+3 About The Same	58	64
+2 Somewhat Worse Than One Year Ago	11	5
+1 Much Worse Than One Year Ago	2	3
Mean	**3.2**	**3.3**

Columns (PROPORTIONAL/MEAN) tested at the 90% confidence level - **A/B**

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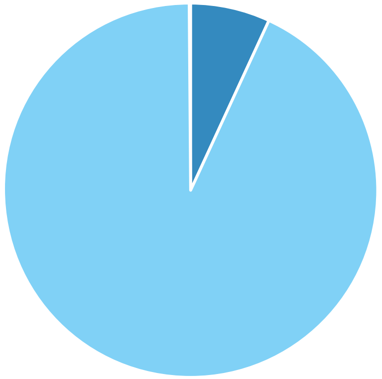
Parents have a very positive perception of their child's’ health

- Reported Body Mass Indices for children in Alberta are in line with national statistics

In general, how would you rate your child/children's health?

	Alberta Residents	
	Total	**Parents Of Kids (2-17)**
(Consumers With Children Aged 2-17 In Their Household)	*(94)*	*(110)*
	%	%
	A	B
Top-Two Box (Net)	**93**	**92**
+5 Excellent	46	45
+4 Very Good	47	46
+3 Good	6	6
+2 Fair	1	2
+1 Poor	0	0
Mean	**4.4**	**4.4**

How tall is your child (in feet and inches) / How much does your child weigh (in pounds) ?
[Children]



Columns (PROPORTIONAL/MEAN) tested at the 90% confidence level - **A/B**

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Agenda

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Possible Avenues for Segmentation in this Study

Healthy / Non-Healthy Segmentation

Check Ingredients	Claimed Health	Body Mass Indices
Healthy: Yes Non-Healthy: No	Healthy: Top 2 Box Non-Healthy: Bottom 3 Box	Healthy: BMI = Below 25 Non-Healthy: BMI = 25+
*Do you usually look at the **ingredients list when you are buying snacks?***	*In general, how would you rate your health?* *(Excellent, Very Good, Good, Fair, Poor)*	*What is your height (in feet and inches)?* *What is your weight (in pounds)?*

Checking of Ingredients yields the most differentiation in response patterns

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Those who are not checking ingredients are more likely to have children who are snacking, increasing the opportunity for poor snack purchase decisions

Including yourself, who in your household eats snack foods (including healthy snacks like celery, cheese, etc), on a regular basis?

	Alberta Residents				BMI Classification (Adults)	
	Check Ingredients	Do Not Check Ingredients	Healthy (Top 2 Box)	Unhealthy (Bottom 3 Box)	Less Than 25	Greater Than 25
(Total Consumers)	*(184)*	*(73)*	*(125)*	*(133)*	(91)	(125)
	%	%	%	%	%	%
	A	B	C	D	E	F
Children Under 18 (Net)	**35**	**48 AF**	**38**	**39**	**46**	**34**
Children Under 2	7	11	6	9	8	7
Children 2-5	16	19	15	19	21	15
Children 6-12	17	27 F	22	18	26	16
Teenagers 13-17	13	21	17	14	19	14
Adults 18-34 (Net)	**39**	**33**	**36**	**38**	**46 F**	**32**
Adult Males 18-34	30	23	28	28	36 F	22
Adult Females 18-34	26	26	26	26	33 F	22
Adults 35-54 (Net)	**52**	**58**	**53**	**53**	**52**	**55**
Adult Males 35-54	33	36	34	33	33	36
Adult Females 35-54	42	51	46	44	44	45
Adults 55 And Over (Net)	**34**	**26**	**30**	**33**	**26**	**38 E**
Adult Males 55 And Over	24	14	22	21	23	25 B
Adult Females 55 And Over	24	19	20	26	18	29 E
No One In Household Eats Snacks On A Regular Basis	3	1	3	2	1	2

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B/C/D/E/F**

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Those who check ingredients are more likely to purchase healthier options (Vegetables, Fruit, Yogurt)

- Those who consider themselves "Healthy" do not exhibit a significant difference in snacking vs. those who are "Unhealthy"

Which of these products, if any, have you purchased in the past week?

	Alberta Residents				BMI Classification (Adults)	
	Check Ingredients	Do Not Check Ingredients	Healthy (Top 2 Box)	Unhealthy (Bottom 3 Box)	Less Than 25	Greater Than 25
(Total Consumers)	*(184)*	*(73)*	*(125)*	*(133)*	(91)	(125)
	%	%	%	%	%	%
	A	B	C	D	E	F
Vegetables	83 B	68	80 B	77	79	81 B
Fresh, Canned Or Dried Fruit	62 B	49	58	59	63	55
Yogurt (Drinkable Or Spoonable) Or Single Serve Cheese	57 B	41	52	53	55	50
Salty Snacks (E.g. Chips, Crackers, Popcorn, Seeds Etc.)	49	68 ACD	54	54	57	57
Candy (Including Mints And Gum) Or Chocolate Bars	38	56 AD	44	41	44	47
Dips/Salsa	27	37	32	27	30	27
Bars (E.g. Breakfast, Granola Etc)	26	29	27	26	29	25
Sweet Baked Goods	20	29	18	27	26	23
Snack Or Dessert Cups	15	19	14	17	15	18
Frozen Confections	11	8	10	10	12	10
Jerky/Meat Snacks	7	11	9	8	11	9
Pre-Packaged Lunch Or Snack Kits	6	11	4	11 C	10	8
None	**2**	**4**	**3**	**3**	**3**	**2**

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B/C/D/E/F**

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Those who check ingredients are also less likely to be Chip Buyers

What kinds of salty snacks (e.g. chips, crackers, popcorn, seeds etc.) have you purchased in the past week?

	Alberta Residents				BMI Classification (Adults)	
	Check Ingredients	Do Not Check Ingredients	Healthy (Top 2 Box)	Unhealthy (Bottom 3 Box)	Less Than 25	Greater Than 25
(Total Consumers)	*(184)*	*(73)*	*(125)*	*(133)*	*(91)*	*(125)*
	%	%	%	%	%	%
	A	B	C	D	E	F
Chips (Net)	**38**	**62[ACDEF]**	**42**	**47**	**47**	**46**
Chips - Potato Chips	27	42[AC]	29	34	32	36
Chips - Tortilla Chips	16	34[ACE]	19	23	21	24
Chips - Multigrain Chips	7	7	6	7	8	5
Chips - Corn Chips	3	5	4	4	5	3
Crackers (Net)	**23**	**30**	**26**	**24**	**30**	**26**
Crackers - Other	21	21	22	20	23	22
Crackers - Sweet Crisps/Crackers	4	8	6	5	9	4
Crackers - Filled Or Sandwich Crackers	3	5	4	3	3	5
Popcorn (Net)	**18**	**26**	**22**	**19**	**24**	**22**
Popcorn - Made Using In A Microwave	10	15	13	10	14	11
Popcorn - Made On A Stovetop Or Using A Popcorn Maker (Such As An Air Popper Or Electric Popper)	5	10	6	8	7	8
Popcorn - Read-To-Eat Popcorn	5	7	6	5	5	6
Nuts	9	12	11	9	9	11
Pretzels	5	10[D]	11[AD]	2	9[D]	6
Cheese Curls Or Puffs	5	5	4	7	4	7
Rice/Popcorn Cakes	4	4	6	3	4	4
Seeds	5	3	7[D]	2	7	3
Snack Mix	3	5	3	4	4	3
Consumers Who Have Not Purchased Salty Snacks In The Past Week	**51[B]**	**32**	**46[B]**	**46[B]**	**43**	**43**

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B/C/D/E/F**

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Gum purchases may be looked upon as a substitute for snacking amongst those with a lower BMI

What kinds of candy (including mints and gum) or chocolate bars have you purchased in the past week?

	Alberta Residents				BMI Classification (Adults)	
	Check Ingredients	Do Not Check Ingredients	Healthy (Top 2 Box)	Unhealthy (Bottom 3 Box)	Less Than 25	Greater Than 25
(Total Consumers)	*(184)*	*(73)*	*(125)*	*(133)*	(91)	(125)
	%	%	%	%	%	%
	A	B	C	D	E	F
Chocolate Candy Bars	19	37 ACE	22	26	23	26
Gum	18	22	18	20	27	17
Chewy Candy	10	11	10	11	9	13
Cough Drops/Throat Lozenges	6	3	5	5	7	5
Hard Candy	7	5	10 D	4	9	6
Breath Mints/Candy Mints	8	4	8	5	5	8
Breath Strips	1	0	1	0	0	1
Other	2	4	2	2	1	3
Consumers Who Have Not Purchased Candy Or Chocolate Bars In The Past Week	**63 B**	**44**	**56**	**59 B**	**56**	**53**

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B/C/D/E/F**

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Naturally those who check ingredients are more prone to purchase fresh fruit vs. alternatives

What kinds of fresh, canned or dried fruit have you purchased in the past week?

	Alberta Residents				BMI Classification (Adults)	
	Check Ingredients	Do Not Check Ingredients	Healthy (Top 2 Box)	Unhealthy (Bottom 3 Box)	Less Than 25	Greater Than 25
(Total Consumers)	*(184)*	*(73)*	(125)	(133)	(91)	(125)
	%	%	%	%	%	%
	A	**B**	**C**	**D**	**E**	**F**
Fresh Fruit	59 B	42	52	56 B	58 B	51
Dried Fruits	9 B	1	9 B	5	10 B	7
Canned Single Serve Fruit	8	12	11	8	10	10
Fruit Snacks/Rolls/Bites	4	5	2	7	4	6
Other	2	3	2	2	1	2
Consumers Who Have Not Purchased Fresh, Canned Or Dried Fruit In The Past Week	**38**	**51 A**	**42**	**41**	**37**	**45**

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B/C/D/E/F**

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Fruit & Salty Snacks are a big differentiator

In general, what type of snack foods do you or your children prefer to eat?

	Alberta Residents				BMI Classification (Adults)	
	Check Ingredients	Do Not Check Ingredients	Healthy (Top 2 Box)	Unhealthy (Bottom 3 Box)	Less Than 25	Greater Than 25
(Total Consumers)	*(184)*	*(73)*	(125)	(133)	(91)	(125)
	%	%	%	%	%	%
	A	**B**	**C**	**D**	**E**	**F**
Fresh (Fruits Or Vegetables)	50 BDF	26	49 BD	38	52 BDF	38
Salty	24	42 AC	28	31	30	33
Sweet	14	21 E	14	19 E	10	16
Cheesy	7	5	7	6	7	7
Other Mentions	4	4	2	6	1	6

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B/C/D/E/F**

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A large proportion of those who do not look at ingredients view snacks in general as unhealthy, but still are stuck in their ways

When thinking about snacks, do you generally think of them as healthy or unhealthy?

	Alberta Residents				BMI Classification (Adults)	
	Check Ingredients	Do Not Check Ingredients	Healthy (Top 2 Box)	Unhealthy (Bottom 3 Box)	Less Than 25	Greater Than 25
(Total Consumers)	*(184)*	*(73)*	*(125)*	*(133)*	*(91)*	*(125)*
	%	%	%	%	%	%
	A	**B**	**C**	**D**	**E**	**F**
More Often Healthy	34 BDF	10	36 BDF	20 B	37 BDF	20
Healthy And Unhealthy Equally	48	48	43	53	45	51
More Often Unhealthy	17	42 ACDEF	21	28 A	18	29 AE

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B/C/D/E/F**

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Those who check ingredients are directionally more likely to be in better health year over year

- Can manufacturers look to make ingredients more prominent upon packaging?

Compared to one year ago, how would you say your health is now? Would you say that it was ...?

	Alberta Residents				BMI Classification (Adults)	
	Check Ingredients	Do Not Check Ingredients	Healthy (Top 2 Box)	Unhealthy (Bottom 3 Box)	Less Than 25	Greater Than 25
(Total Consumers)	*(184)*	*(73)*	*(125)*	*(133)*	*(91)*	*(125)*
	%	%	%	%	%	%
	A	**B**	**C**	**D**	**E**	**F**
Top-Two Box (Net)	**31^{D}**	**25**	**38^{BD}**	**21**	**29**	**32^{D}**
+5 Much Better Now Than One Year Ago	9^{D}	7	14^{DF}	2	11^{D}	6
+4 Somewhat Better Now Than One Year Ago	22	18	24	19	18	26
+3 About The Same	58	58	58	58	64	53
+2 Somewhat Worse Than One Year Ago	10^{C}	14^{C}	4	17^{ACE}	8	13^{C}
+1 Much Worse Than One Year Ago	1	4	0	4^{C}	0	2
Mean	**3.3^{D}**	**3.1**	**3.5^{ABDF}**	**3.0**	**3.3^{BD}**	**3.2^{D}**

Columns (PROPORTIONAL/MEAN) tested at the 90% confidence level - **A/B/C/D/E/F**

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Taste & Price are important factors, which is consistent with the Focus Group Findings

- Nutrient information is also of importance in particular towards those who check ingredients

[…] how important do you consider this factor when choosing snack foods for your household?
(Most Important Responses – Top Box Only)

	Alberta Residents	
	Check Ingredients	Do Not Check Ingredients
(Total Consumers)	*(184)*	*(73)*
	%	%
	A	B
Nutrient Content (E.G. Fat Calories Etc)	42 B	14
Taste	40	55 A
Price	10	22 A
Texture (Crunchy/Chewy)	8	10

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B**

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Those who do not check ingredients are more likely to be parents

Demographics Household Composition

	Alberta Residents				BMI Classification (Adults)	
	Check Ingredients	Do Not Check Ingredients	Healthy (Top 2 Box)	Unhealthy (Bottom 3 Box)	Less Than 25	Greater Than 25
(Total Consumers)	*(184)*	*(73)*	*(125)*	*(133)*	*(91)*	*(125)*
	%	%	%	%	%	%
	A	B	C	D	E	F
Teens/Children 17 And Under (Net)	38	52 AF	39	44	49 F	36
Children Under 12 Only	24	30	22	30	30	22
Children Both 13-17 And Under 12	7	14	11	7	13	6
Teens 13-17 Only	6	8	6	7	7	8
No Teens/Children 17 And Under	63 BE	48	61	56	51	64 BE

Columns (PROPORTIONAL) tested at the 90% confidence level - A/B/C/D/E/F

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Those who do not check ingredients are slightly more likely to be unemployed, raising the concern of price into the equation as well

At Pre-Use: Demographics at the present time, are you employed? Is that full-time or part-time?

	Alberta Residents				BMI Classification (Adults)	
	Check Ingredients	Do Not Check Ingredients	Healthy (Top 2 Box)	Unhealthy (Bottom 3 Box)	Less Than 25	Greater Than 25
(Total Consumers)	*(184)*	*(73)*	*(125)*	*(133)*	*(91)*	*(125)*
	%	%	%	%	%	%
	A	**B**	**C**	**D**	**E**	**F**
Employed	65	62	67	61	67	62
Employed Full Time (35 Hours Or More)	47	49	51	45	53	46
Employed Part Time (Less Than 35 Hours)	17	12	16	16	14	16
Retired	15	7	13	13	9	18 BE
Unemployed	7	18 A	9	11	11	9
Student	2	0	1	2	1	2
Other	11	14	10	14	12	9

Columns (PROPORTIONAL) tested at the 90% confidence level - **A/B/C/D/E/F**

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Those who check ingredients are also making substantially more money, allowing for purchases of such higher priced products

At Pre-Use: Demographics Total Household Income Before Taxes

	Alberta Residents				BMI Classification (Adults)	
	Check Ingredients	Do Not Check Ingredients	Healthy (Top 2 Box)	Unhealthy (Bottom 3 Box)	Less Than 25	Greater Than 25
(Total Consumers)	*(184)*	*(73)*	*(125)*	*(133)*	*(91)*	*(125)*
	%	%	%	%	%	%
	A	B	C	D	E	F
+25.0 Under $25,000	3	8	3	5	2	7
+32.5 $25,000 To $39,999	10	7	6	12	7	11
+52.5 $40,000 To $64,999	18	21	22	16	16	23
+72.5 $65,000 To $79,999	9	16	9	14	9	15
+90.0 $80,000 And $99,999	12	8	10	12	19 BCF	7
+110.0 $100,000 And $119,999	9	10	10	8	7	11
+120.0 $120,000 Or More	15	10	16	11	20 DF	10
Refused To Answer	24 F	21	24 F	23 F	21	14
Mean	**77.3 F**	**71.0**	**79.0 BDF**	**72.2**	**82.8 BDF**	**70.0**

Columns (PROPORTIONAL/MEAN) tested at the 90% confidence level - **A/B/C/D/E/F**

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Agenda

Background

Findings Preview

How Do Alberta Residents & Families Snack?

What role do health conscious behaviours & attitudes play?

Executive Summary

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Executive Summary

Understanding Snacking Behaviour

- Parents predominantly purchase ‘healthier’ snack options, but also gravitate towards ‘Salty Snacks’ (Chips)
  - Nationally and within Alberta, there has been higher sales growth in Fresh Vegetables, Fruit and Yogurt in 2011
- Snack purchases are largely driven by ‘Health’ and ‘Satisfaction’, while ‘Convenience’ is a cost of entry
  - Unhealthy snacks (Chips and Candy) serve as convenient treats for the entire family, however are not worth paying more for
- Adult Males 35-54 are likely having a negative influence upon children based upon snacking habits;
  - Fresh fruit is least likely to be purchased for this group
  - Habitually drink soft drinks, increasing the presence within households
- Snacking is initially looked upon as a regimented snack/break or routine of habit among children 2-5, however as kids age, enjoyment becomes the main catalyst
  - However, overall reported health among Children 2-17 is very positive, reinforced with an incidence of reported overweight children in line with national statistics (defined as having a BMI = 25+).

Health Conscious Attitudes & Actions

- Defined “Health Conscious Individuals” in 3 separate manners, yielding different results:
  - Those who check ingredients
  - Those who claim to be healthy
  - Those who have a BMI < 25
- Those who check ingredients are very much more likely to be purchasers of ‘healthier’ snack options
  - The same does not hold for claimed healthy individuals, nor actual BMI based healthy individuals
- A large proportion of those who do not look at ingredients view snacks in general as unhealthy, but still are stuck in their ways
  - These individuals (who do not look at ingredients) tend to be Parents and also earn less income, suggesting further barriers to overcome
    - 80% are not willing to pay more for the healthier options
- Manufacturers should look to ways to help consumers be more aware of what’s in their snack to help with healthier decisions
- Consumers are looking for several different aspects in an “ultimate” snack food:
  - Knowledge of ingredients
  - Inexpensive
  - Taste Appeal
  - Satisfaction
  - Convenience (cost of entry)

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Thank You

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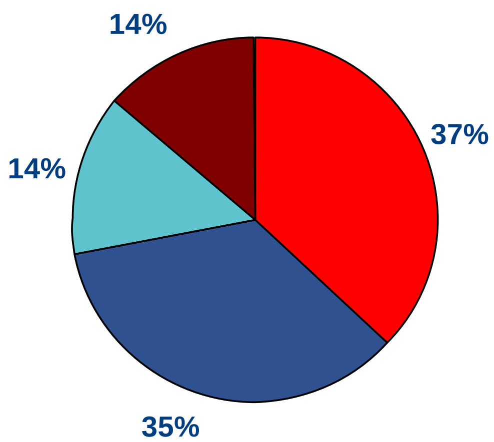
BASES® Competitive Insights Analysis - Key Category Drivers
General Population - Alberta - All Brands

Convenience
Is easy for kids to prepare themselves (0.76)
Is convenient to take with you on the go (0.67)
Is quick to prepare (0.66)
Is not messy to eat (0.53)

Appeal
Is a good snack when you want to treat yourself (0.76)
Is a good snack when you want to treat your family (0.75)
Is fun for kids to eat (0.54)
Is a snack that kids like (0.43)
Is a good treat for kids (0.40)



Satisfaction
Appeals to the entire household (0.72)
Is a snack that adults like (0.65)
Is satisfying (0.59)
Is a reasonable price per serving (0.4)

Health
Is a healthy snack (0.85)
Is a nutritious snack (0.84)
Is a good choice for healthy eating (0.83)
Is good for your health (0.83)
Is a snack you feel good giving your child (0.78)
Is a good everyday snack (0.74)
Is worth paying more for (0.59)

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Category Performance Report

TOTAL SNACKS/CONFECTIONERY/DESSERT - All Channels

52 Weeks to Nov 19 11

		National				Alberta			
		$ Vol	$ Vol % Chg	Unit Vol	Units Vol % Chg	$ Vol	$ Vol % Chg	$ Vol	Units Vol % Chg
TOTAL SNACKS/CONFECTIONERY/DESSERT		6,539,911.9	2	4,589,356.7	2	865,922.8	3	613,251.5	4
TOTAL SNACK		4,245,510.5	2	1,726,499.9	0	555,291.9	3	214,764.6	2
TOTAL CONFECTIONERY		1,993,348.5	1	2,236,981.5	3	271,544.5	1	326,462.6	5
TOTAL DESSERT		301,053.0	1	625,875.3	0	39,086.5	4	72,024.3	3
SNACK FOODS	SNACK	1,476,413.0	3	761,010.8	0	188,877.3	4	99,405.0	2
CHOCOLATE	CONFECTIONERY	1,307,373.1	3	1,729,332.3	5	177,873.1	3	257,742.7	6
COOKIES	SNACK	718,586.7	1	270,338.8	2	71,445.4	3	24,627.6	4
NUTRITIOUS PORTABLE FOODS	SNACK	645,373.1	1	221,877.1	0	94,876.9	1	29,647.7	2
CRACKERS	SNACK	465,086.9	3	187,399.8	2	57,824.3	3	21,033.9	3
SNACKING FRUITS NUTS & SEEDS	SNACK	434,424.3	8	95,311.2	-1	59,342.4	15	11,508.2	4
CANDY CONFECTIONS	CONFECTIONERY	419,850.5	1	250,059.1	0	59,246.0	1	36,964.8	2
FRUIT & APPLE SAUCE - SINGLE SERVE	DESSERT	152,639.4	3	316,037.1	4	19,813.4	8	36,541.4	8
POPPING CORN	SNACK	106,404.0	-8	26,696.1	-10	14,914.5	-11	3,476.7	-11
MEAT STICKS & BEEF JERKY	SNACK	103,509.5	5	36,737.6	-2	25,247.6	7	8,858.7	18
SNACK PUDDINGS	DESSERT	82,908.1	-3	252,430.0	-3	9,879.7	0	28,153.0	-1
PUFFED CAKES	SNACK	79,021.1	-2	45,038.4	4	10,078.0	-4	5,201.1	0
LUNCH KITS	SNACK	61,503.8	-3	24,589.1	-1	10,306.3	-2	3,719.4	3
DRY FRUIT	SNACK	54,234.5	0	13,147.4	2	7,912.8	-3	1,732.5	2
LUNCH PACKS	SNACK	41,643.0	0	21,693.0	6	6,100.0	-2	2,559.8	1
CANDIED SNACK FOODS	SNACK	22,974.0	-11	11,376.1	-12	3,616.9	-16	1,753.3	-18
RTE GELATIN	DESSERT	17,370.3	-5	35,309.5	-4	2,527.3	-6	4,678.4	-5
PUDDING - RTE FAMILY SIZE	DESSERT	2,469.5	-5	952.9	-14	161.1	-5	60.2	-14
TOTAL REFRIG/DAIRY		10,423,987.0	3	4,377,601.9	2	1,228,511.2	4	482,168.0	3
YOGURT PRODUCTS - REFRIGERATED		1,292,535.4	5	1,879,205.4	3	152,951.1	5	196,722.3	3
RTE PUDDING & GELATIN - REFRIGERATED		59,738.0	11	95,850.7	13	7,187.6	14	10,756.7	14

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