

DATAPOINTS

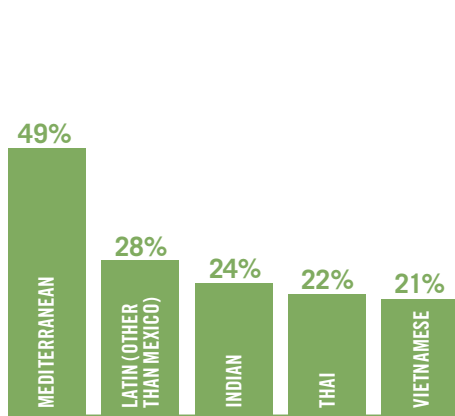
Specialty Food Growth Outpaces Mainstream

Mediterranean cuisine, locally produced fare and products emphasizing purity stand out among specialties, according to the 2013 State of the Specialty Food Industry report. The Specialty Food Association (formerly NASFT) worked with Mintel International and SPINS to

poll manufacturers, importers, distributors, brokers and retailers, and track 59 food categories for the report. SFA analyzes the production and distribution of each individual brand to determine whether or not it is “specialty.” **SOURCE: Specialty Food Association**

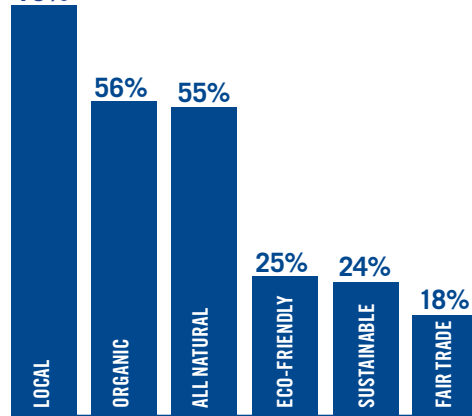
According to Specialty Food Retailers ...

Emerging Ethnic Cuisines



SOURCE: Mintel

Most Influential Claims



Top 10 Specialty Food Categories

(in billions)

Cheeses and cheese alternatives.....	\$3.61
Yogurt and kefir.....	\$2.27
Chips, pretzels and snacks.....	\$2.16
Coffees, coffee substitutes and cocoa.....	\$2.14
Meat, poultry and seafood.....	\$2.04
Breads and baked goods.....	\$1.69
Energy bars and gels.....	\$1.69
Frozen lunch and dinner entrees.....	\$1.63
Condiments, dressings and marinades.....	\$1.50
Frozen desserts.....	\$1.17

SOURCE: Mintel/SPINS/Nielsen

“Long-term health in the specialty food industry is based on both indulgence and the demand for healthier food. Usually the same consumer on the same day is looking for both things.”

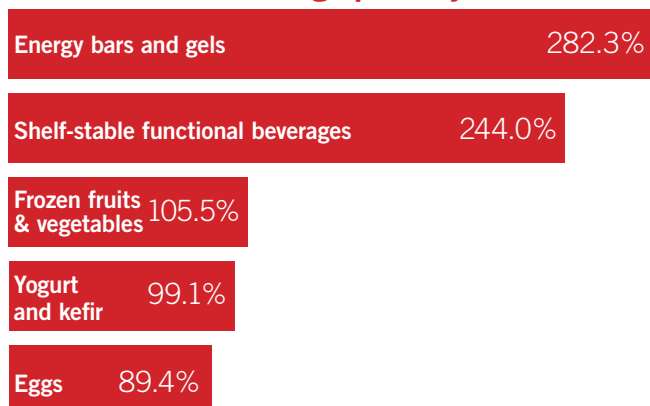
— DAVID LOCKWOOD, director of Mintel Consulting

On the Fast Track

The specialty food market grew at more than three times the pace of all foods from 2010-2012

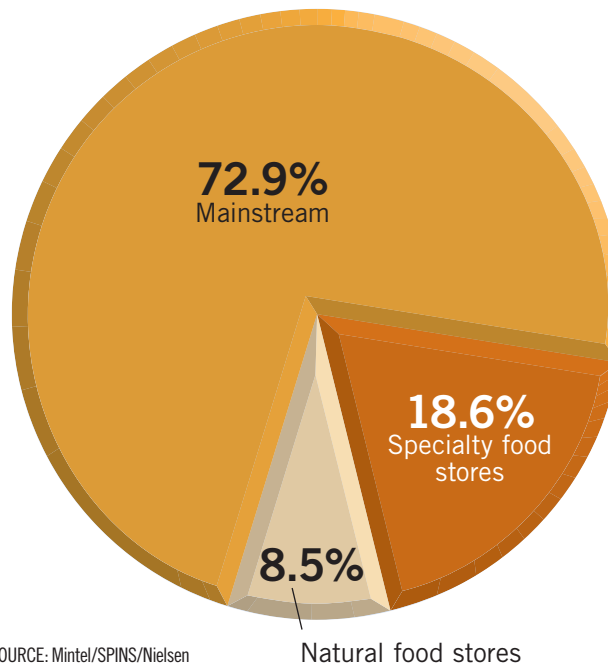
Specialty: 25.4% • All: 7.9%

Fastest Growing Specialty Foods



SOURCE: Mintel/SPINS/Nielsen/IRI Infoscan Reviews

Specialty Food Sales by Retail Channel

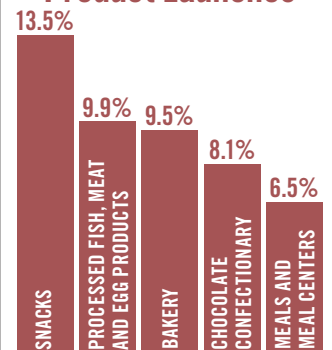


SOURCE: Mintel/SPINS/Nielsen

32%

of premium products introduced in 2012 made a kosher claim

Top 5 Specialty Product Launches



SOURCE: Mintel/Global New Products Database