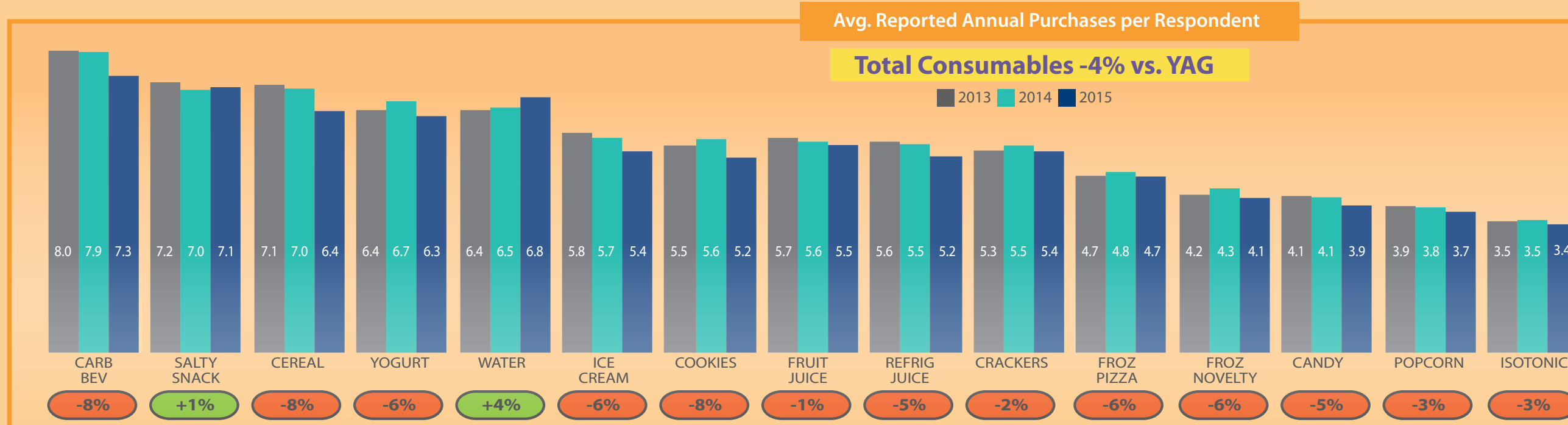
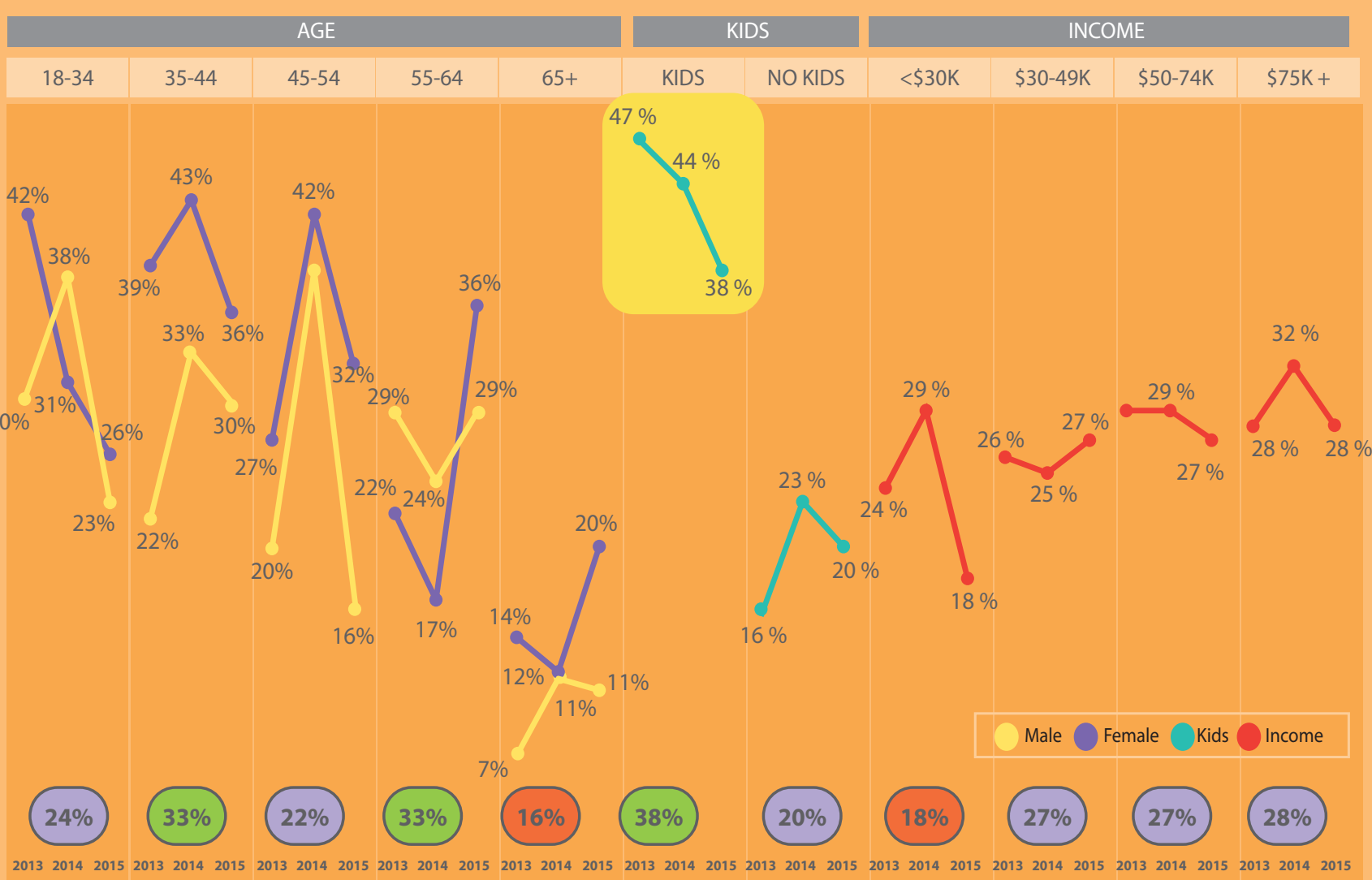


2015 TABS Consumables Study Shows Fewer Deals Lead to Discouraged Consumers and Lower Sales

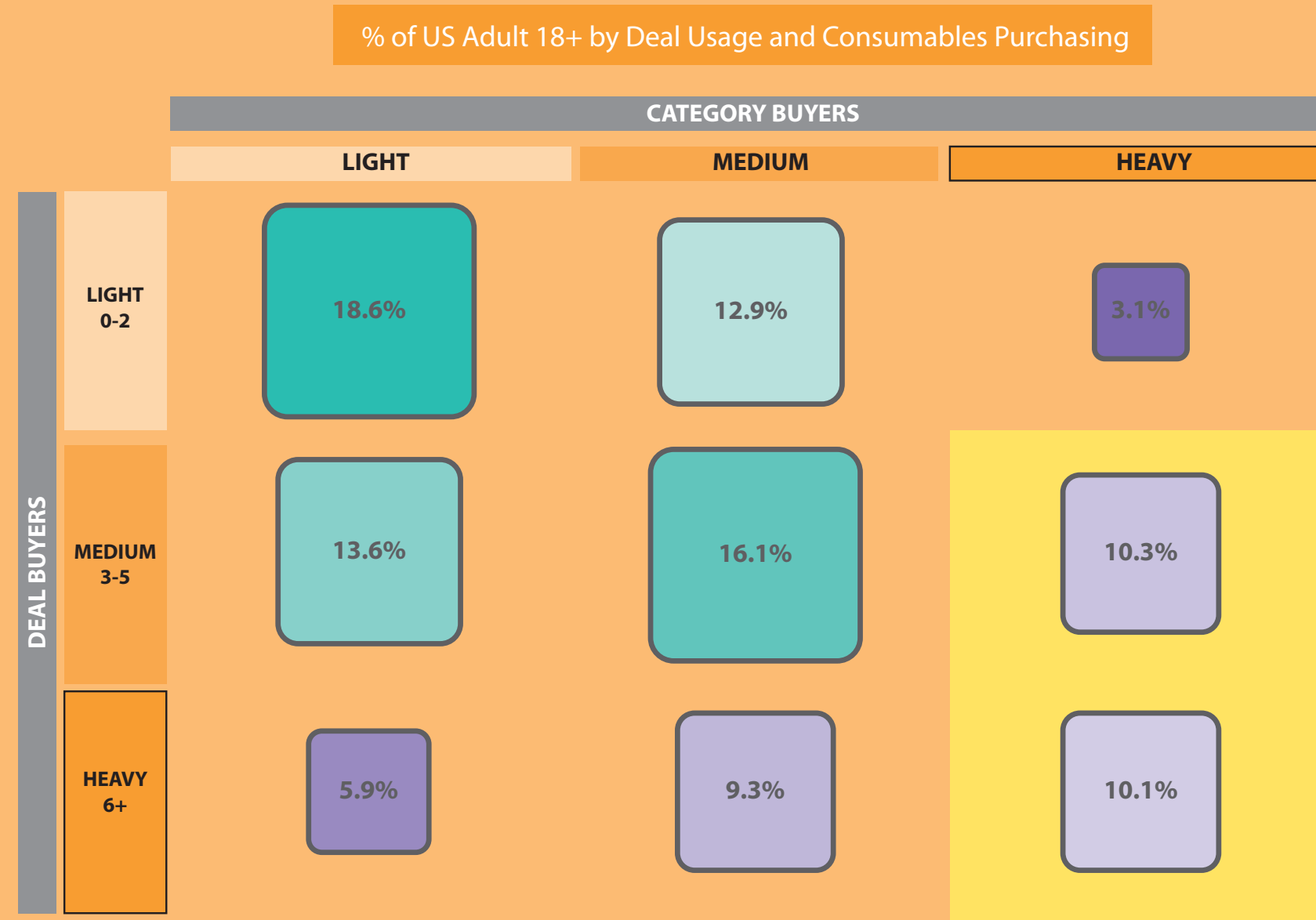
Total consumables purchase rates are down 4% in 2015; only salty snacks and water were up.



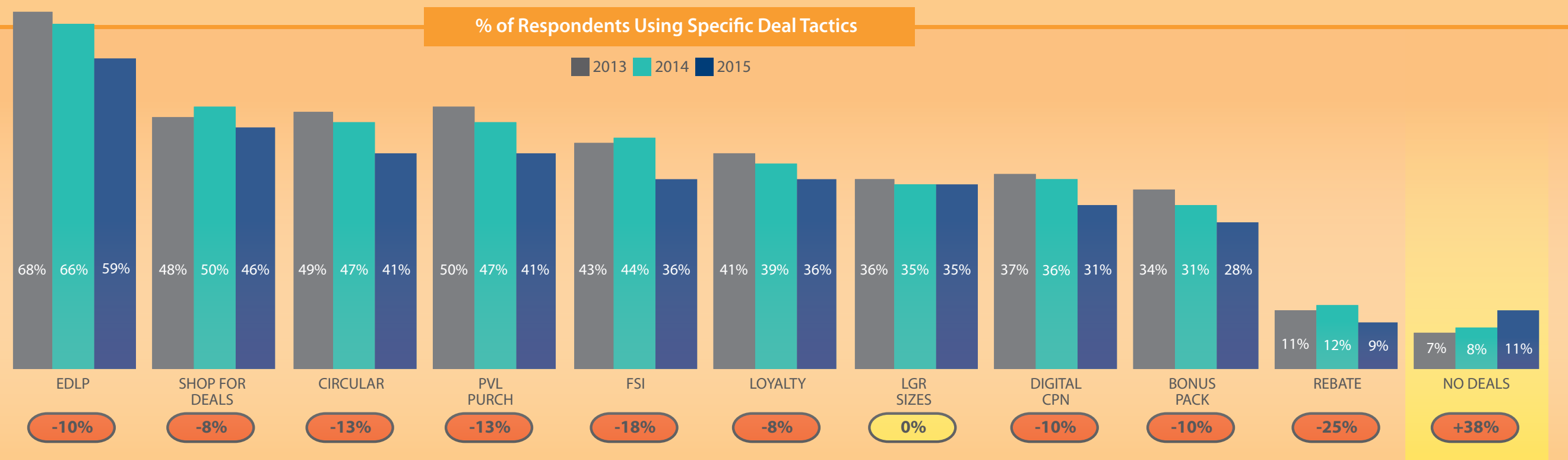
Heavy buying among households with children, the key consumer target, declined 14% in 2015.



Heavy Deal Users purchase much more than Light Deal Users.



Yet deal participation declined in 2015 which was a big factor in the weak Consumables sales.



METHODOLOGY Survey fielded by TNS to 1,000 Adults 18-75 August 2013 and August 2014. Fielded by Caravan in August 2015. Areas of Questioning Consumables Categories Purchased and Frequency of Purchase (15 Categories); 20% of CPG Retail \$. Consumables Categories - Candy, Carb Bev, Salty Snacks, Ice Cream, Yogurt, Cereal, Refrigerated Drink, Fruit Juice, Cookies, Crackers Strong Agreement on Types of Deal Tactics Utilized (10 Tactics) Outlets where purchase Consumables Regularly (No specific Grocery breaks) TABS Group Tests and Checks for: Internal Data Validity External Industry Corroboration (correlate data to Purchase Frequency by Category) Known Frequency understatement of Single-Serve oriented categories (Carb Bev, Water). Trend still correlates with in-market trends.