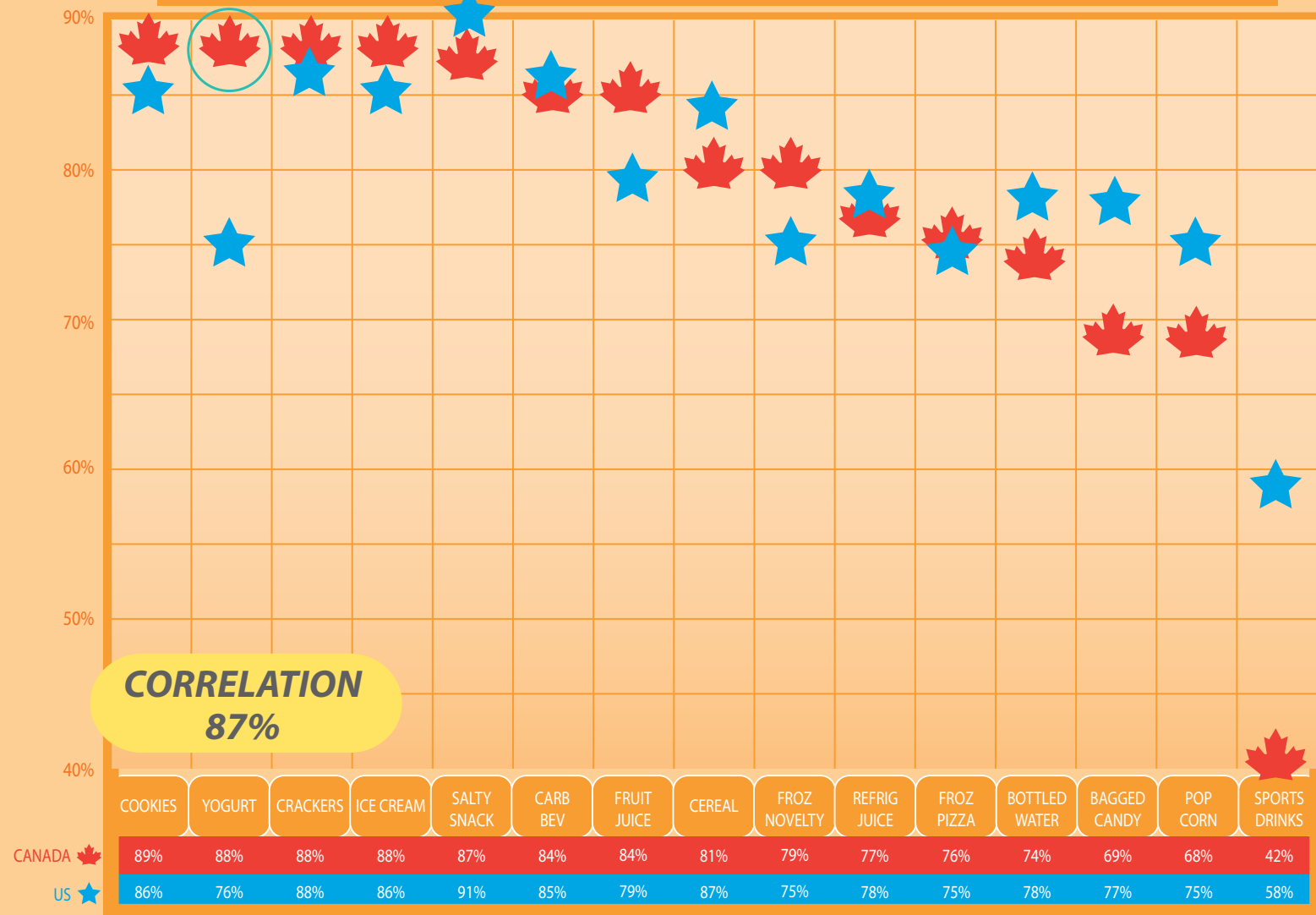


# TABS Group Survey Reveals Similarities and Differences Between Canadian and U.S. Consumers

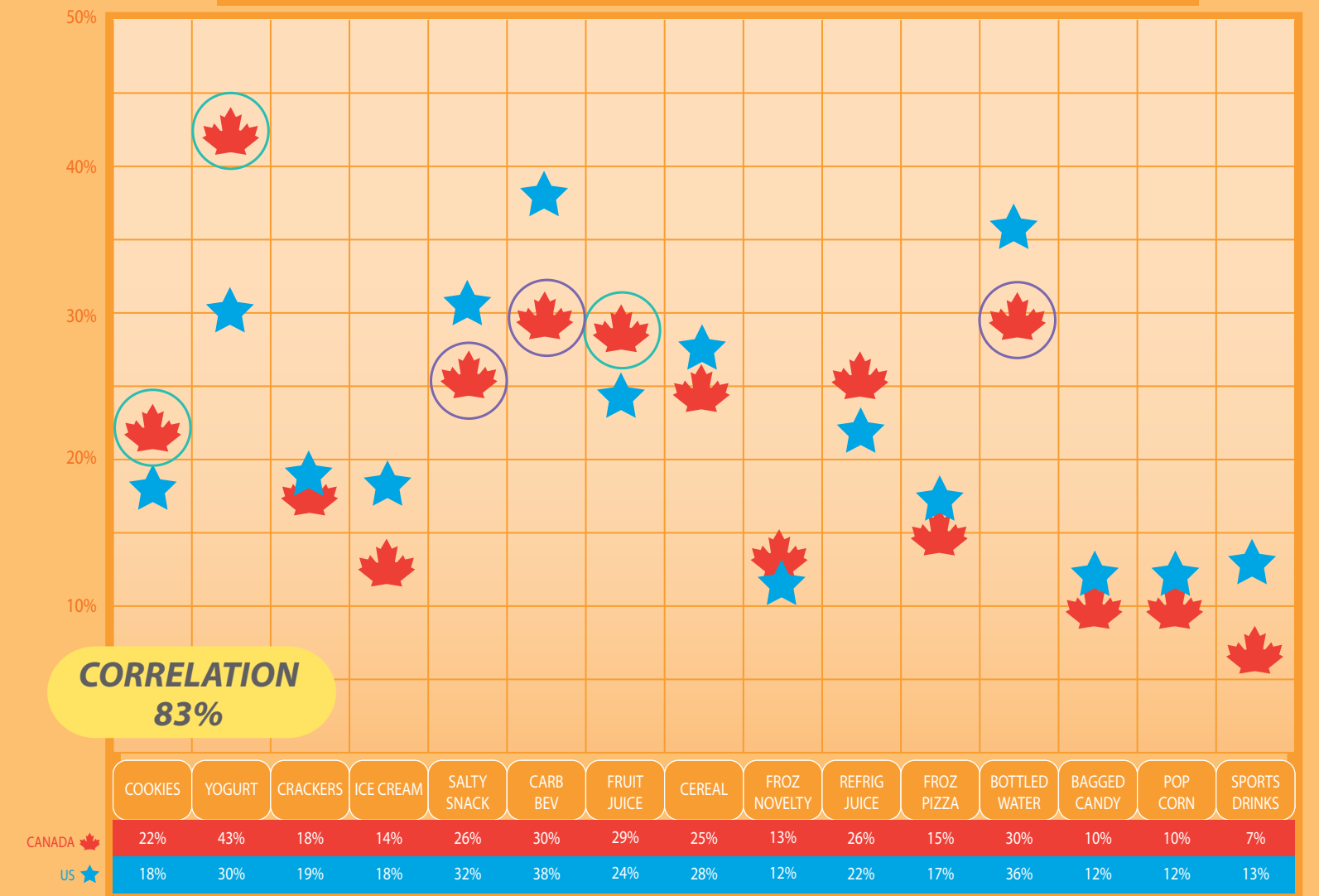
Food and beverage consumables categories surveyed showed similar penetration rates between Canada and the U.S. with both countries averaging about 12 categories purchased.

Clear category preferences emerge with very heavy buying households (12+ times/year), with Canadians favoring yogurt, fruit juice and cookies while Americans love carbonated beverages, salty snacks and bottled water.

Penetration by Food & Beverage Consumables Category: Canada vs. US



Very Heavy Buyer Incidence by Consumables Category: Canada vs. US



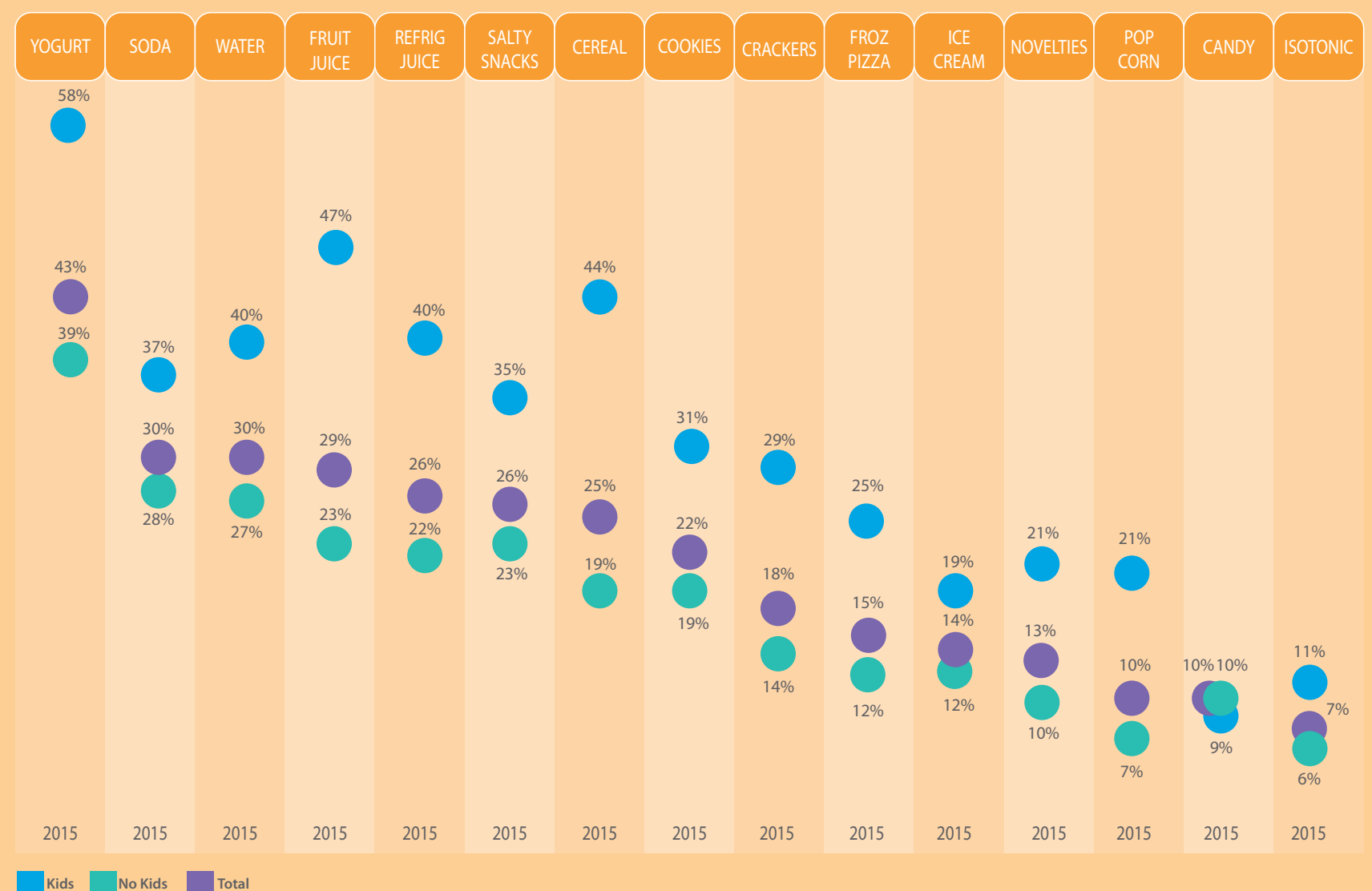
Households with children are even more important to food & beverage consumables sales in Canada than the U.S. and are by far the most important demographic variable for predicting food and beverage consumables purchases in Canada.\*

Canadian households with children have the highest numbers of heavy buyers across 14 of the 15 food and beverage categories surveyed and account for over 50% of consumables purchases.

Canada Percentage of Each Group that Are Heavy Consumables Buyers



Canada Heavy Buying by Households with Children Present



METHODOLOGY Survey fielded by TNS to 1,000 Adults 18-75 September 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, Refrig 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. Source: TABS Group Consumer Value Study - CASep. 2015. 1,000 General Pop Adults 18-75