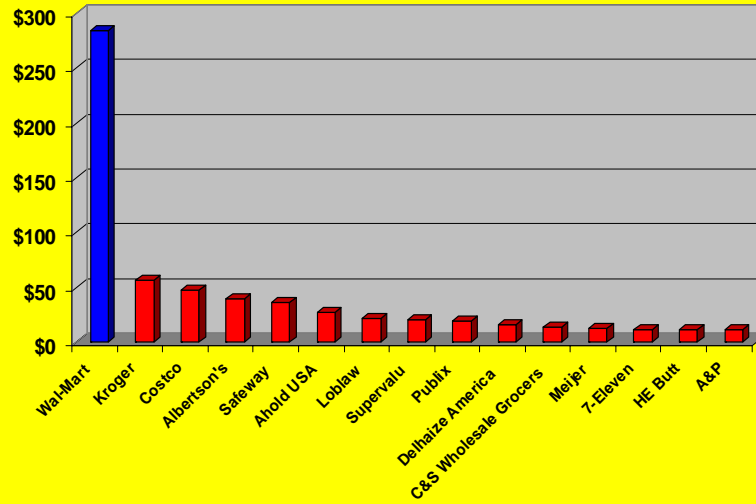


US Retail Grocery Landscape



## Market Segmentation

- Wholesalers
- Retailers
- Food Service
- Military
- Exports
- School Districts

- Reduction of Shrink
- Forward Contracting
- Replenishment—100% Customer Fulfillment
- Year round supply
- DSD or logistics
- Food safety protection
- Just in time delivery
- Promotional allowances; incentives
- Demonstrations
- Merchandising support and product rotation
- Every day low pricing and promotional pricing
- Recipe, POS support
- Consolidation
- Points of differentiation
- Programs tailored to customer initiatives

## Supply Side Requirements of the marketplace that correspond to demand trends

- Special Niche
- Fresh/Available
- Convenient packaging
- Proper label declarations
- Consumer friendly
- Food safety--traceability
- Reasonable Quality/Price value ratio
- Logistics/cold storage
- Year round availability

**Tell the story...**

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