

**IT'S NOT ABOUT  
IDEAS  
IT'S ABOUT  
MAKING  
IDEAS HAPPEN**





***Mission: Offer innovative, 'better for you' snacking experiences***

MARKS &  
SPENCER

WHOLE  
FOODS  
MARKET

SAFEWAY 

Sainsbury's



TESCO  
*Every little helps*



Woolworths  
*the fresh food people*



**W** WOOLWORTHS

2019: 98% EXPORTS  
(USA – UK – AUSTRALIA & 12 OTHER COUNTRIES)

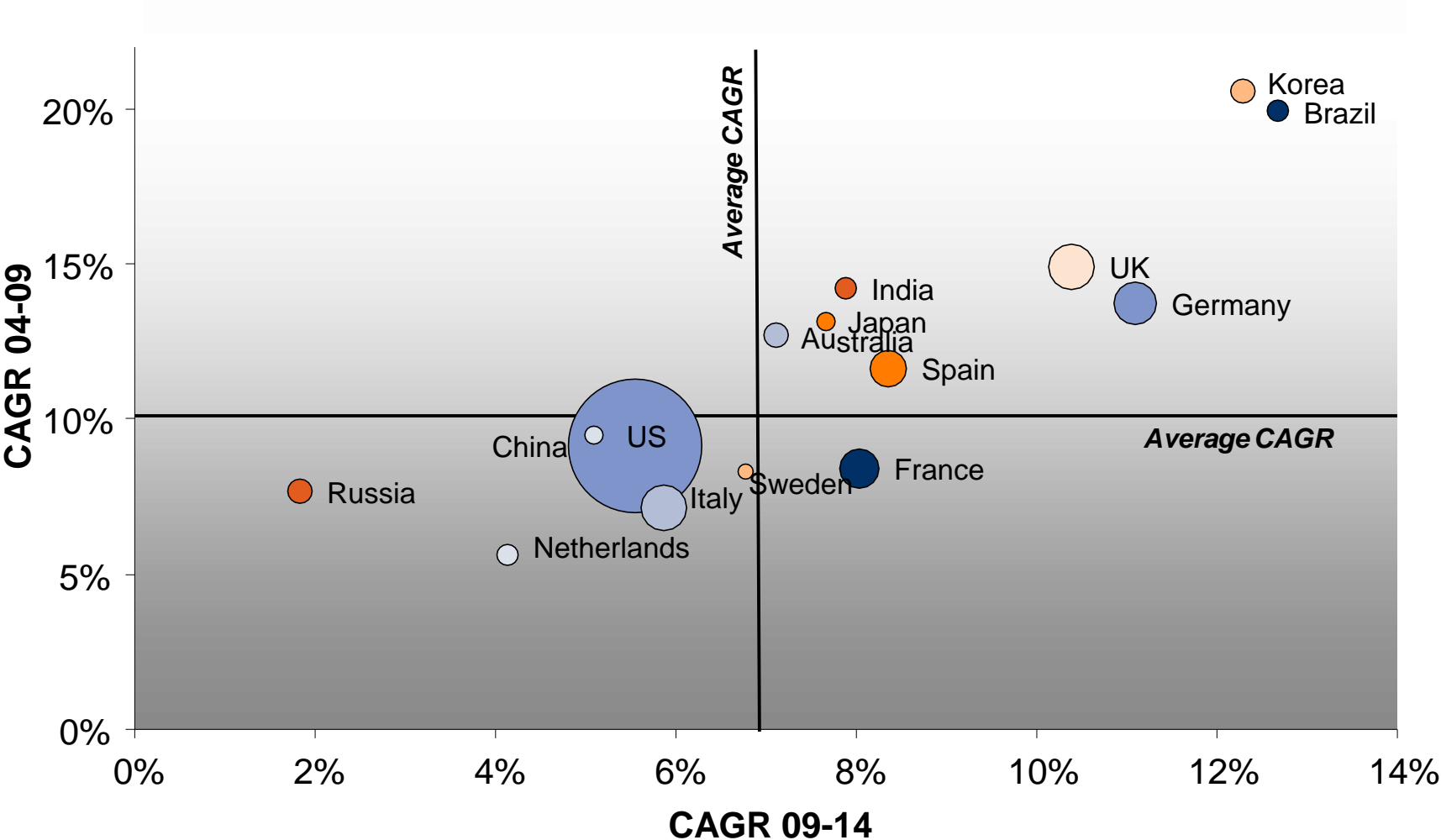
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We always start with.... **Market Insight**

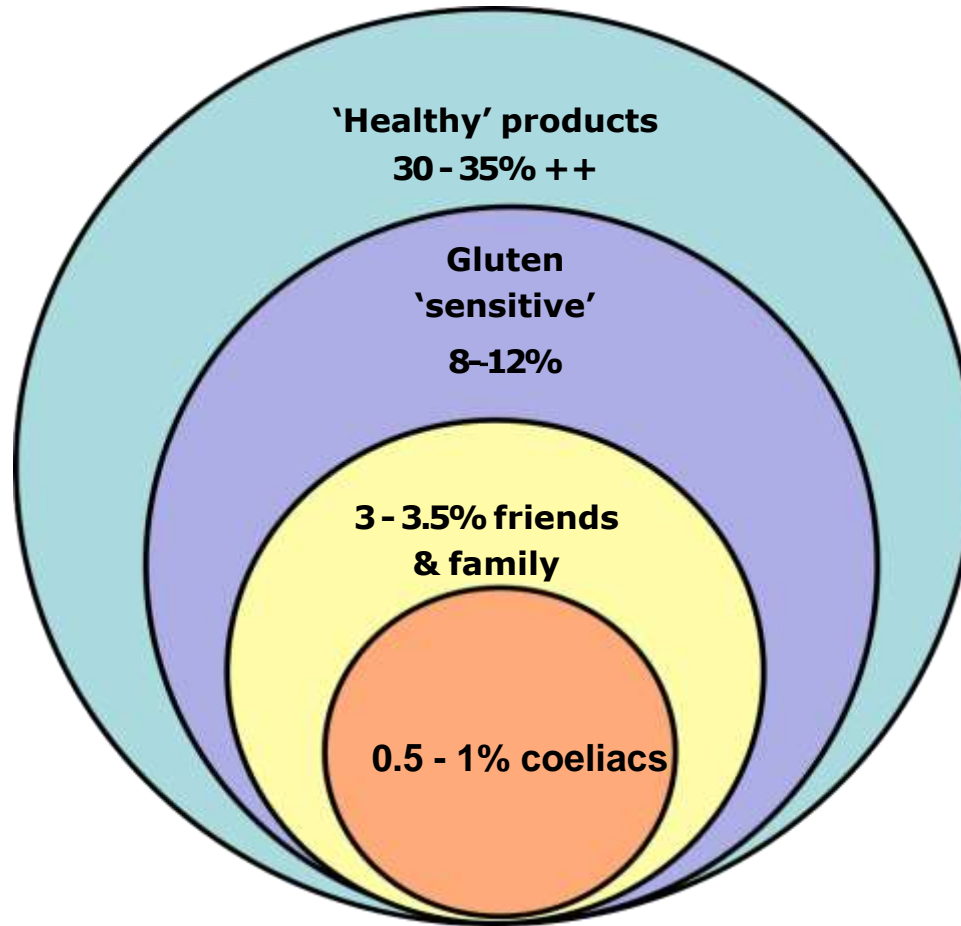
Then comes....

1. Product Idea
2. Proposition or Product Development
3. Execution
4. Pivot or Repeat

# Market Insight #1 – The Market Trend



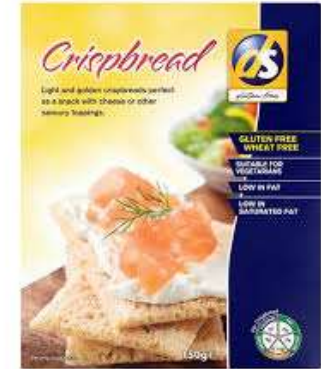
# Market Insight #2 – Who is driving demand?



## Market Insight #3 – The Consumer

- ✓ They follow a ***healthier diet overall – Gluten Free alone not enough***
  - ✓ They like to experiment
  - ✓ They care about social responsibility
  - ✓ They are highly educated on health aspects and diet
  - ✓ They prefer products which are organic and local or *with special ingredients*
  - ✓ They are willing to pay a premium, but not too much..
  - ✓ They prefer small bags and portion control.
- 
- ✓ *They are not very happy with choices available. They feel they sacrifice too much on taste and product quality when they choose Gluten Free.*

# 'Gluten Free' – The Competition (2009)





*Wellaby's*

The logo for Wellaby's features the brand name in a dark red, cursive font. Below the text is a stylized smile composed of two curved lines, one larger and one smaller, also in dark red.

*Living Well. Tasting Great.*

Living Well. Tasting Great.

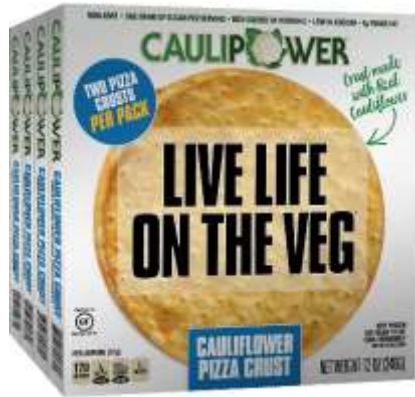
**Wellaby's**



# 'Gluten Free' – The Competition (2015)



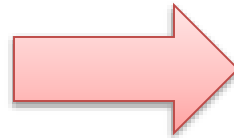




# Market Insights 2018

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Idea



Product Development



# SALES. SUCCESS.

Explosive sell through since launching FTGU's salty snack and cracker items in July!!

## THE PROOF IS IN THE...CAULIFLOWER.

FTGU Pretzels have taken 20%+ natural market share in the last 16 weeks since inception.

- Sprouts - #1, #2 skus (50% category share - 2x Glutino skus)
- Fresh Thyme - #1, #2 skus (80% category share - 4x Glutino skus)
- Fairway - #1, #2 skus (25% category share - 4x Glutino skus)
- Kings - #1, #2 skus (56% category share - 8x Glutino skus)
- Morton Williams - #1, #2 skus (55% category share - 20x Glutino skus)
- Bristol Farms - #1, #2 skus (39% category share - 2x Glutino skus)
- Shoprite - #2, #3 pretzel skus (19% category share - 2x Glutino skus)
- Big Y - #1, #2 pretzel skus (37% category share - 2x Glutino skus)
- Hy-Vee - #3, #4 pretzel skus (21% category share)
- Rouses - #1, #2 pretzel skus (75% category share - 6x Glutino skus)
- CVS - #1 pretzel sku (76% category share)

FTGU Crackers have taken 8%+ natural market share in the last 16 weeks since inception.

- Fairway - #1, #2, #4 skus (18% category share - 3x Simple Mills skus)
- Kings - #1, #2, #5 skus (22% category share - 4x Simple Mills skus)
- Fresh Thyme - #11, #15 skus (9% category share)
- Fresh Market - #9, #22 skus (8% category share - 2x Simple Mills skus)
- Morton Williams - #1, #2, #4 skus (19% category share)
- Bristol Farms - #8, #11 skus (11% category share)
- Shoprite - #7, #10, #12 skus (8% share - 2x Simple Mills skus)
- Big Y - #1, #13, #20 Skus (12% share - 2x Simple Mills skus)
- Rouses - #3, #5, #6 skus (20% category share)
- CVS - #2 cracker sku (35% category share)



Lake Grove WF



Shoprite Livingston



More Safeway display action



Dierbergs

