State of the Business

Insight brought to you by:
Snyder's Lance Category Management Team

2013

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Agenda

- Channel/Convenience Trends
- Snacking Trends and Insights
- Snack Category Review
  1. Pretzel Segment
  2. Kettle Chip Segment
  3. Sandwich Cracker Segment
  4. Popcorn/Nuts
- Retailer Innovation
- Summary/Actions

Channel/Convenience Trends

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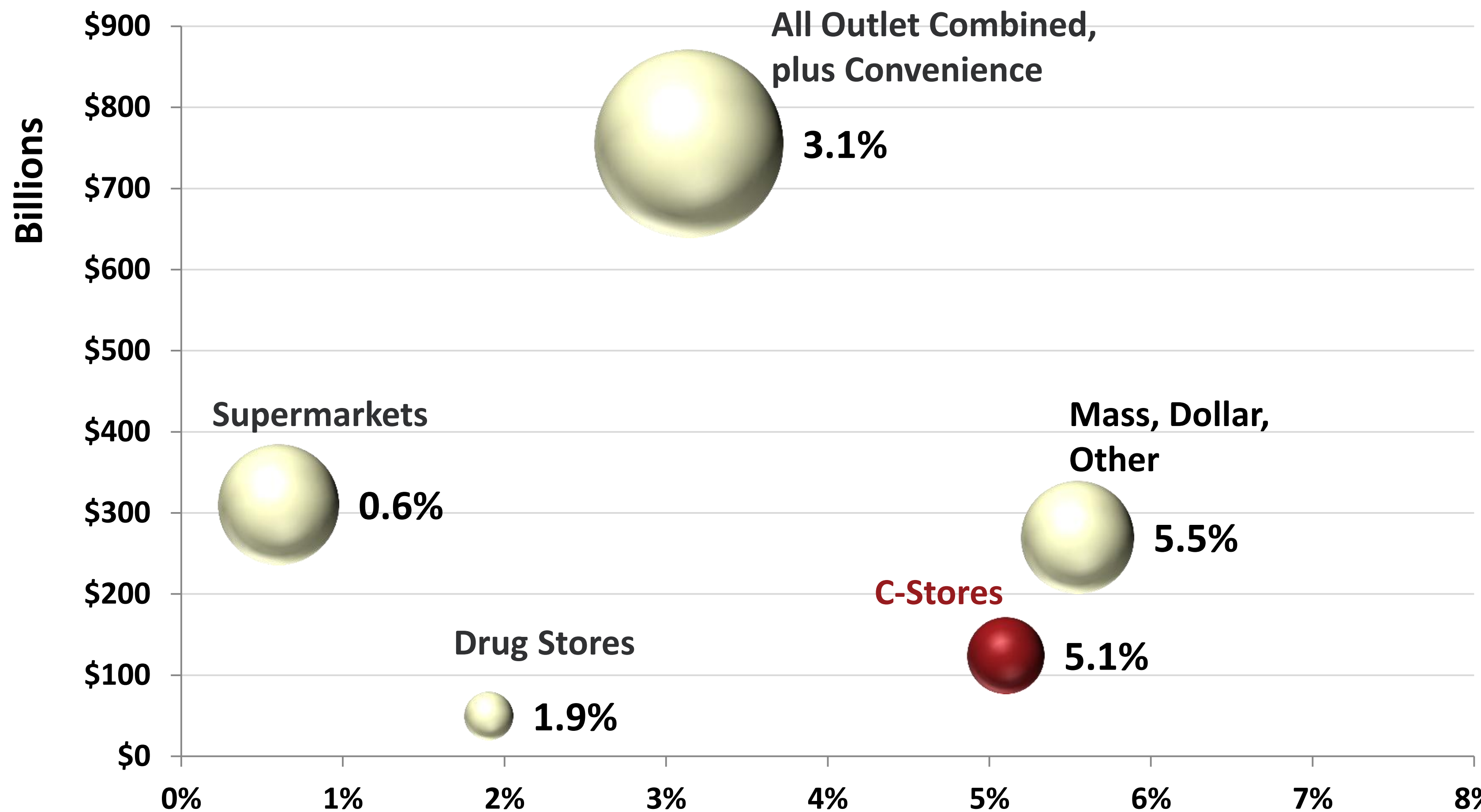
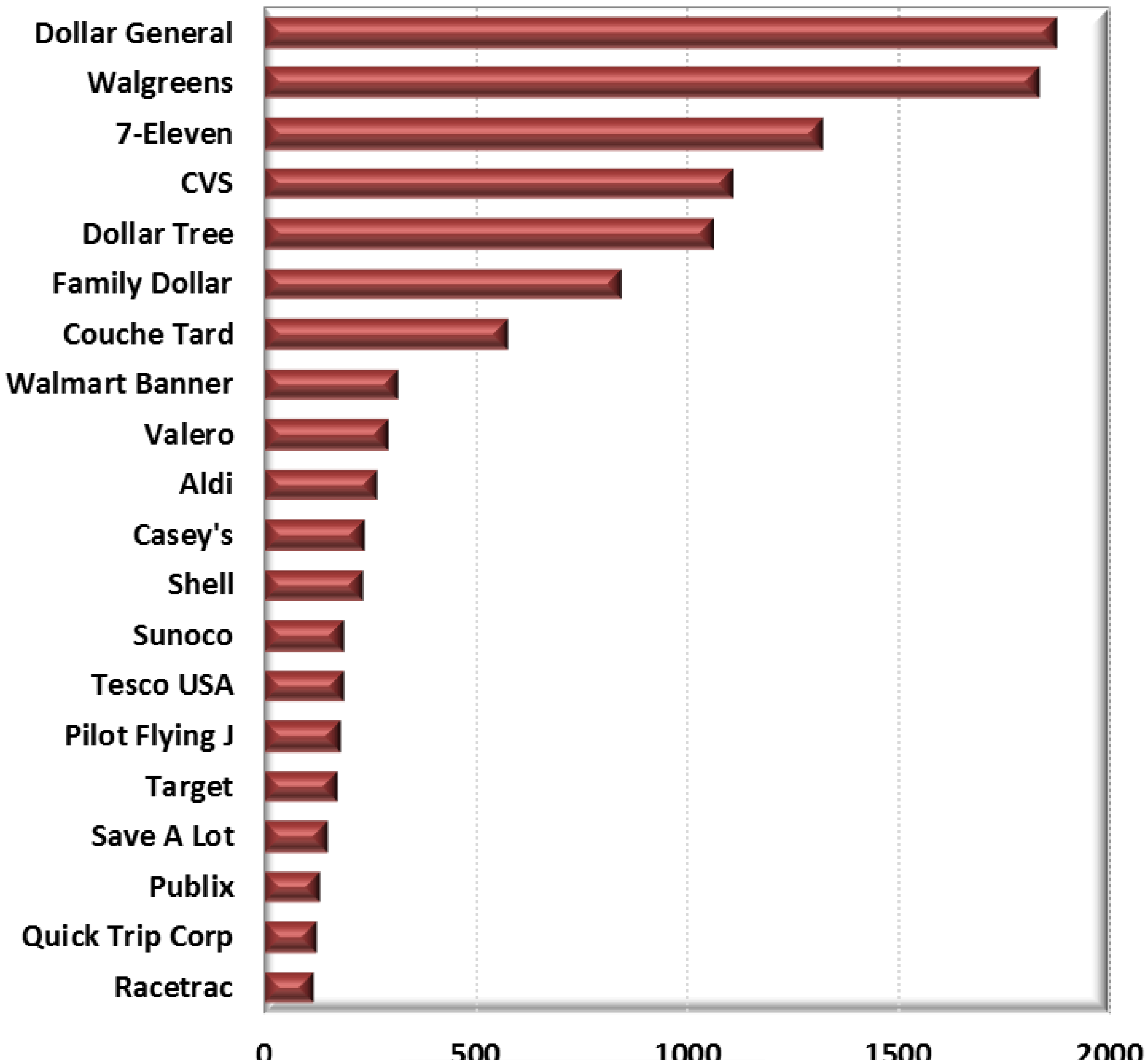
Convenience Stores Growing Faster Than Supermarkets and Drug

Sales are shifting within Channels. C-Stores are outpacing All Outlet $ growth, therefore gaining a larger share of shopper's dollars



Source: Nielsen All Outlet 52 wk end 10/27/2012

of Stores Added Since 2007 to Mid 2102



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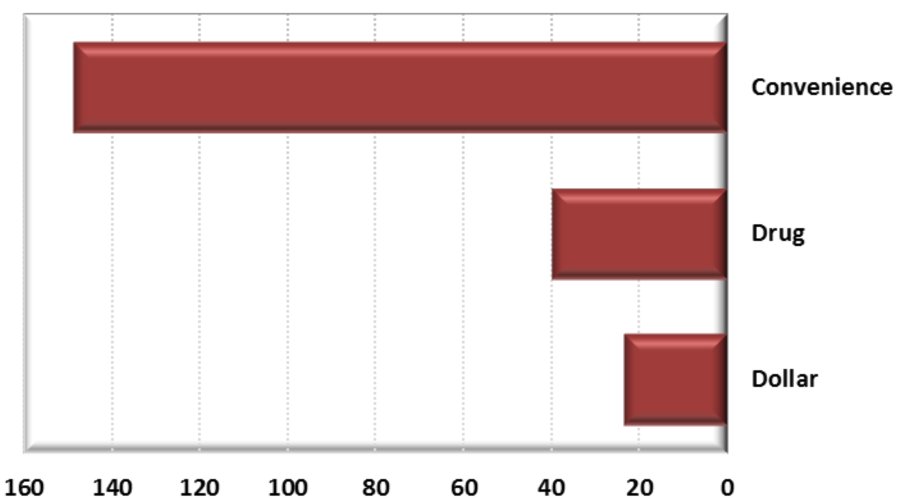
Source: Nielsen Global Convenience Symposium Deck TDLinx

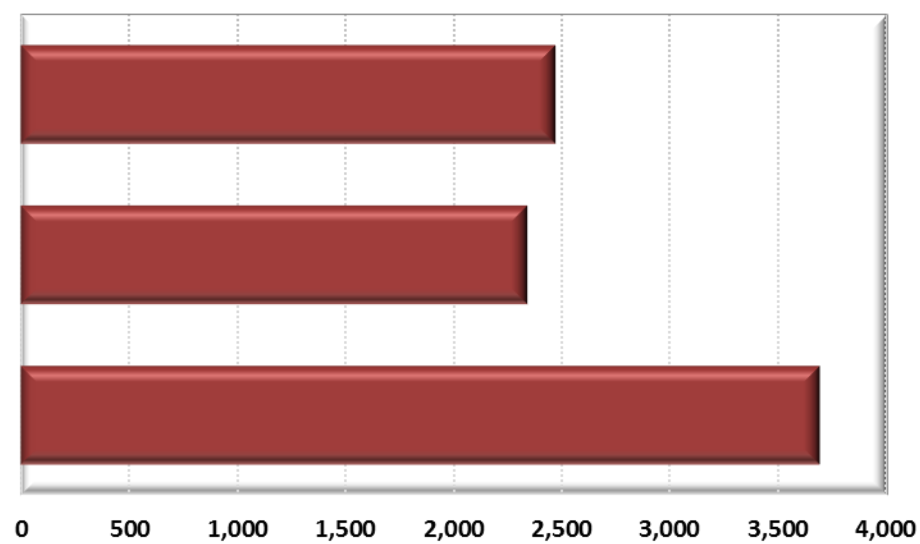
Convenience Stores Dominate Total US Small Box Format

- All formats attract > % of smaller HHs
- Drug attracts older females, C-Stores attract male-only HHs, but 45 to 64 females important to all
- Lower income attraction for C-stores & Dollar stores; Drug more evenly developed across income groups
- White HHs dominate spending in all; Black households are relatively bigger C-store & Dollar store shoppers; stronger attraction to C-stores among Hispanics
- Dollar Growing Store Counts

Store Counts
(in Thousands)



Store Count Growth



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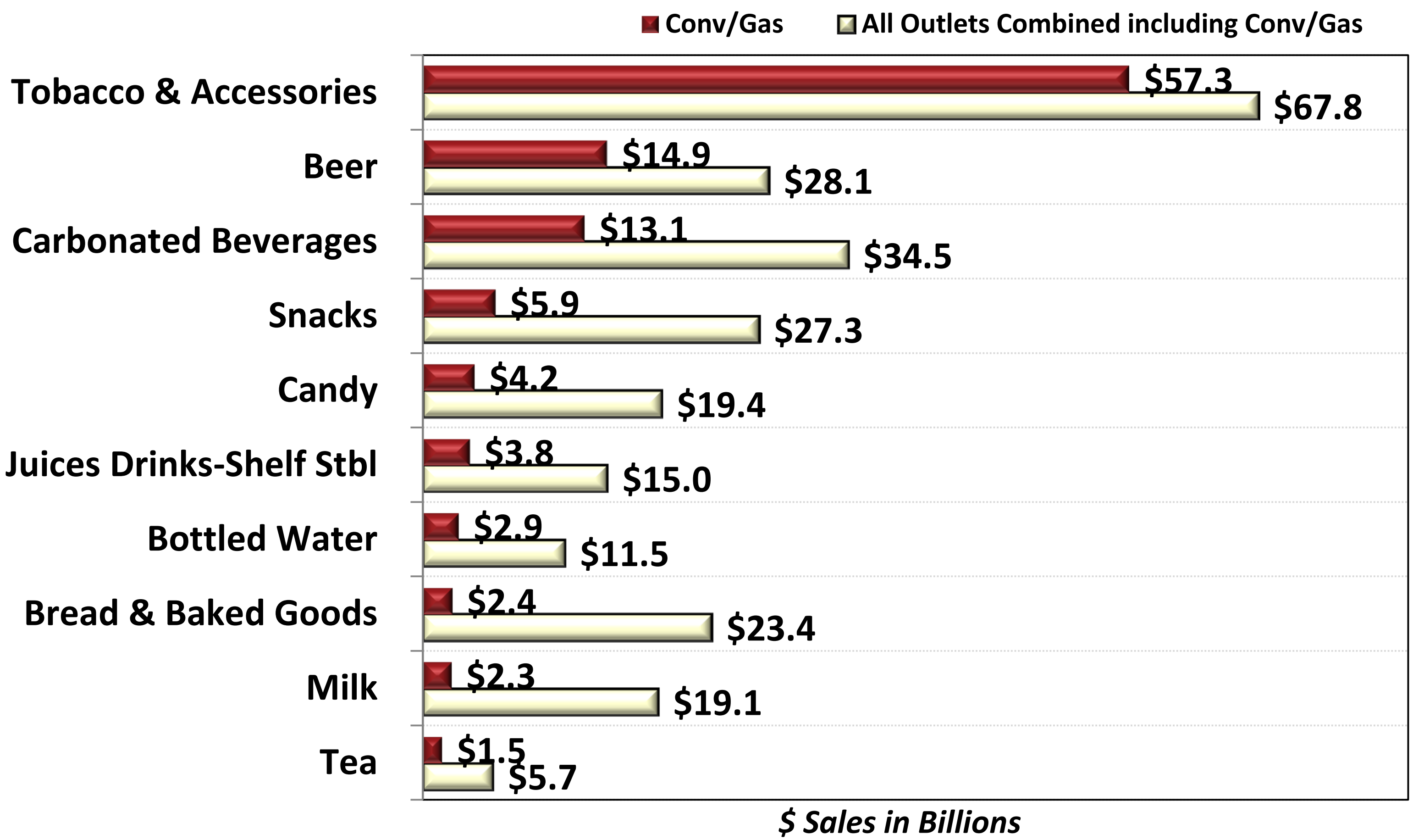
Source: Nielsen Global Convenience Symposium Deck TDLinx 2012

Top Selling C-Store Categories ($ Sales)

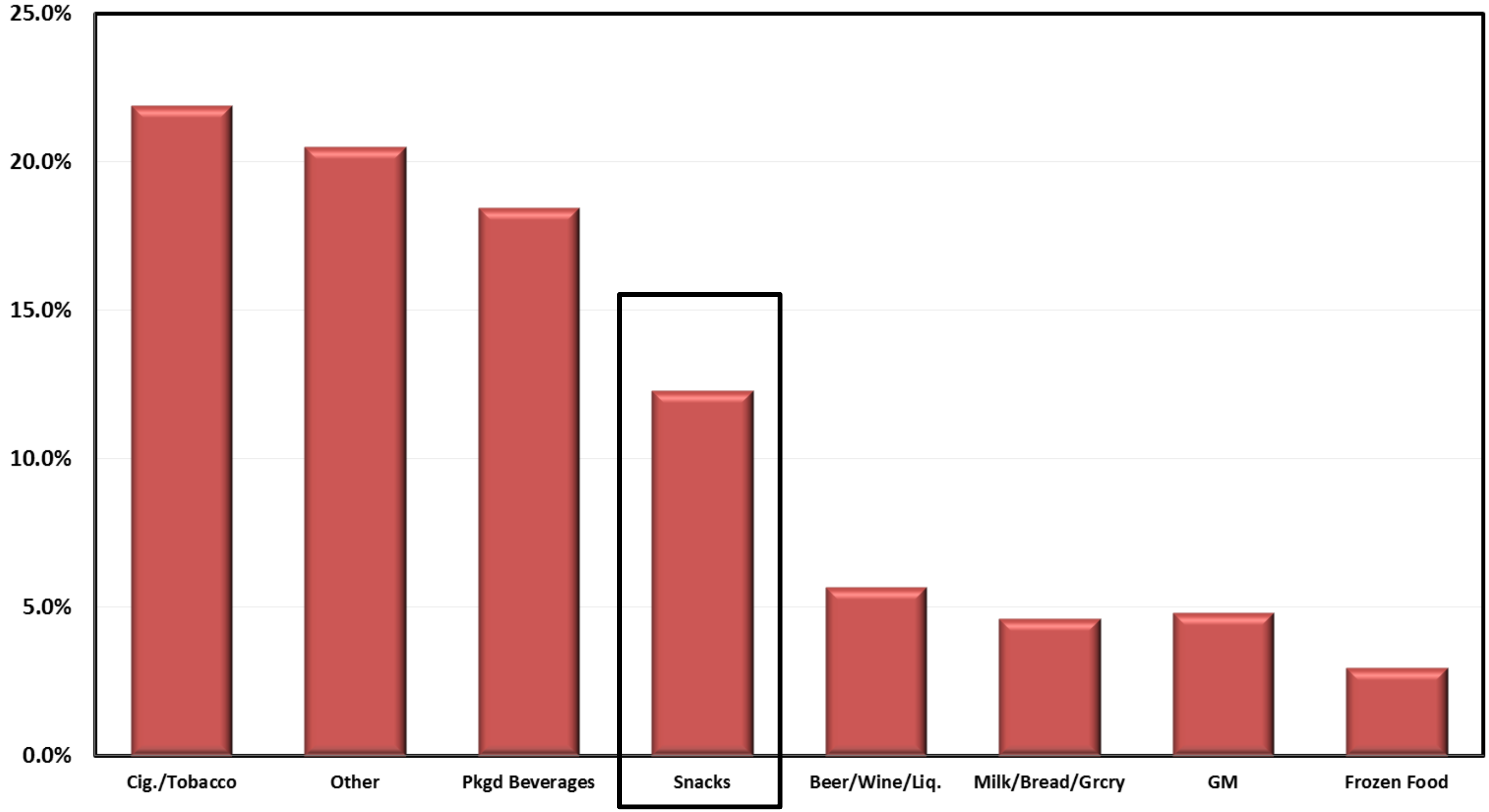
Snack Category is #4 and very important part of Convenience Store Business



Source: Nielsen Scantrack, Total U.S. 52 wk ending 11/24/2012 (vs. prior year);

Convenience Store Inside Categories Contribution to Margin

Snack Category is also #4 Margin Producer



Source: NACS 2011 Factbook, Margin contribution based on 23,000+ store averages for 2011

Dollar Stores Encroaching on C-Store's Core Categories

Family Dollar growth strategy - focusing on Value and Convenience is being realized by:

- ***Expanding assortments in key consumable businesses like food and health and beauty aids***
- ***Introducing new categories like tobacco, magazines and gift cards***
- ***Expanding coolers in 1,375 stores***

Family Dollar Stores, Q3 2012 Earnings call (June 28, 2012)—

"In early May, we began rolling out tobacco products to our stores. At the end of the quarter, about 1,300 of our stores were selling tobacco. And by the end of the fiscal year, we expect about 6,000 stores will offer tobacco products."

Dollar Tree and Dollar General have begun to sell beer and wine in some stores [2]

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Source: Family Dollar website; 2-Race for Space Article byJerry Soverinsky in Oct. 2012 issue of NACS magazine

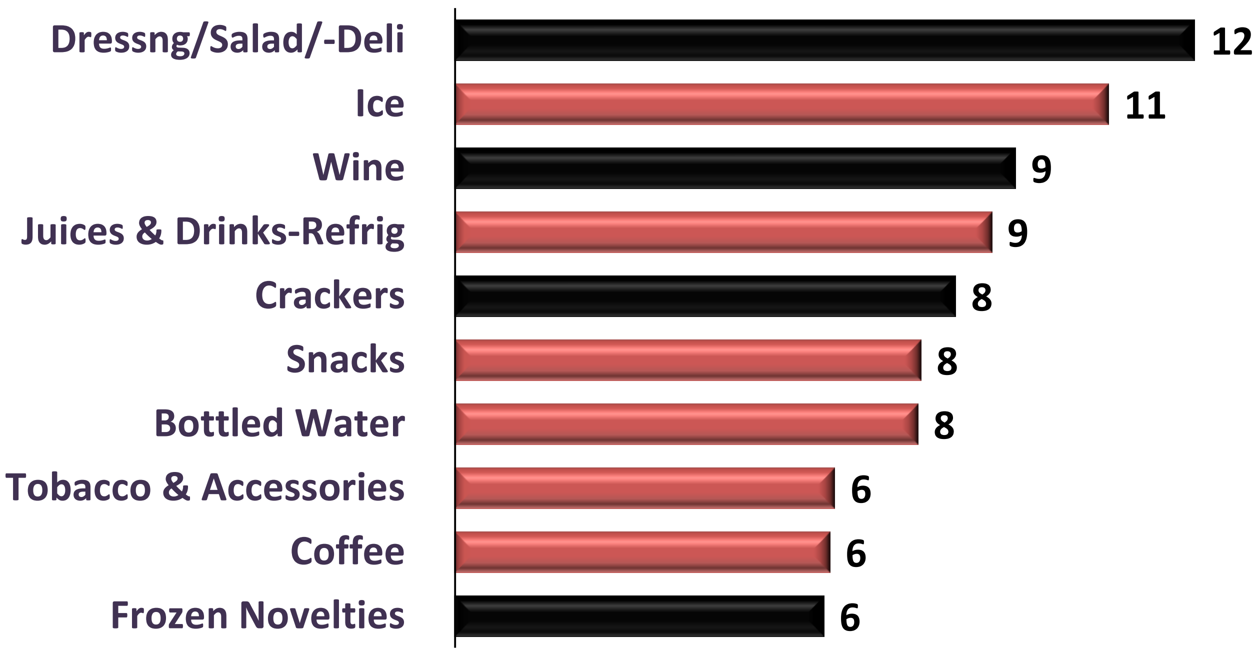
Drug Channel Top $ Growth Categories – *C-Store Channel Beware*

Drug Retailers are silently becoming a larger Convenience Store by:

1. *growing categories where Convenience is typically strong*
2. *locating stores on prime real estate*
3. *adding electric car charging stations*
4. *selling Fresh Foods*

Walgreens Charging Station

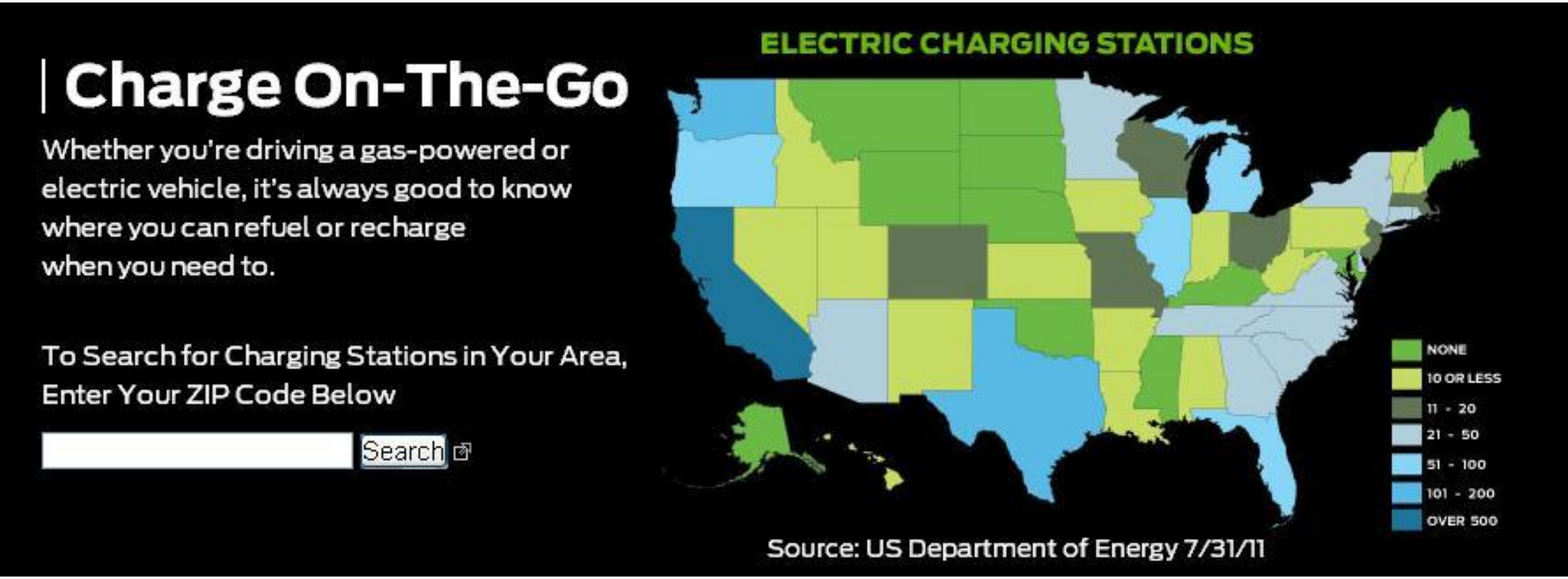
Categories in Red are large C-Store Categories



Walgreens Sushi Bar

Source: Nielsen Scantrack, Total U.S.; *Categories w/ sales of $50 million+ in Drug Channel
52 weeks ending 11/24/2012 (vs. prior year)

Many Retailers Piloting Electric Vehicle Charging Stations



Target · Macy's · Fred Meyer · Kohl's expect great things · Sears · IKEA · Best Buy · Walmart · Kroger · Walgreens · Whole Foods Market

More Retailers Leveraging Gas Rewards In Loyalty Programs

Convenience Stores Not Tied In To These Programs Are Losing Traffic

SAFEWAY Ingredients for life.

Kroger

Winn Dixie

GIANT EAGLE

GetGo from GIANT EAGLE

weis

Stop&Shop

Cub

Lowes foods

H-E-B

BI-LO

Rutter's Why Go Anywhere Else?

Albertsons

Speedway

Source: Company websites & Logobase

1/3rd Buying Gas Linked to Grocery Spending

Are you… buying more gas at locations because of incentives tied to spending levels at GROCERY store where you shop?

	'05	'06	'07	'08	'09	'10	'11	'12
Yes	NA	NA	19%	21%	25%	24%	28%	32%

Threat to C-Stores who are not participating

Source: Nielsen Homescan Surveys; Stop & Shop

Price is Biggest Factor in Choosing Where To Purchase Gas

85%

of HH claimed to buy gas at Convenience/gas stores

Source: Nielsen Online Views Survey

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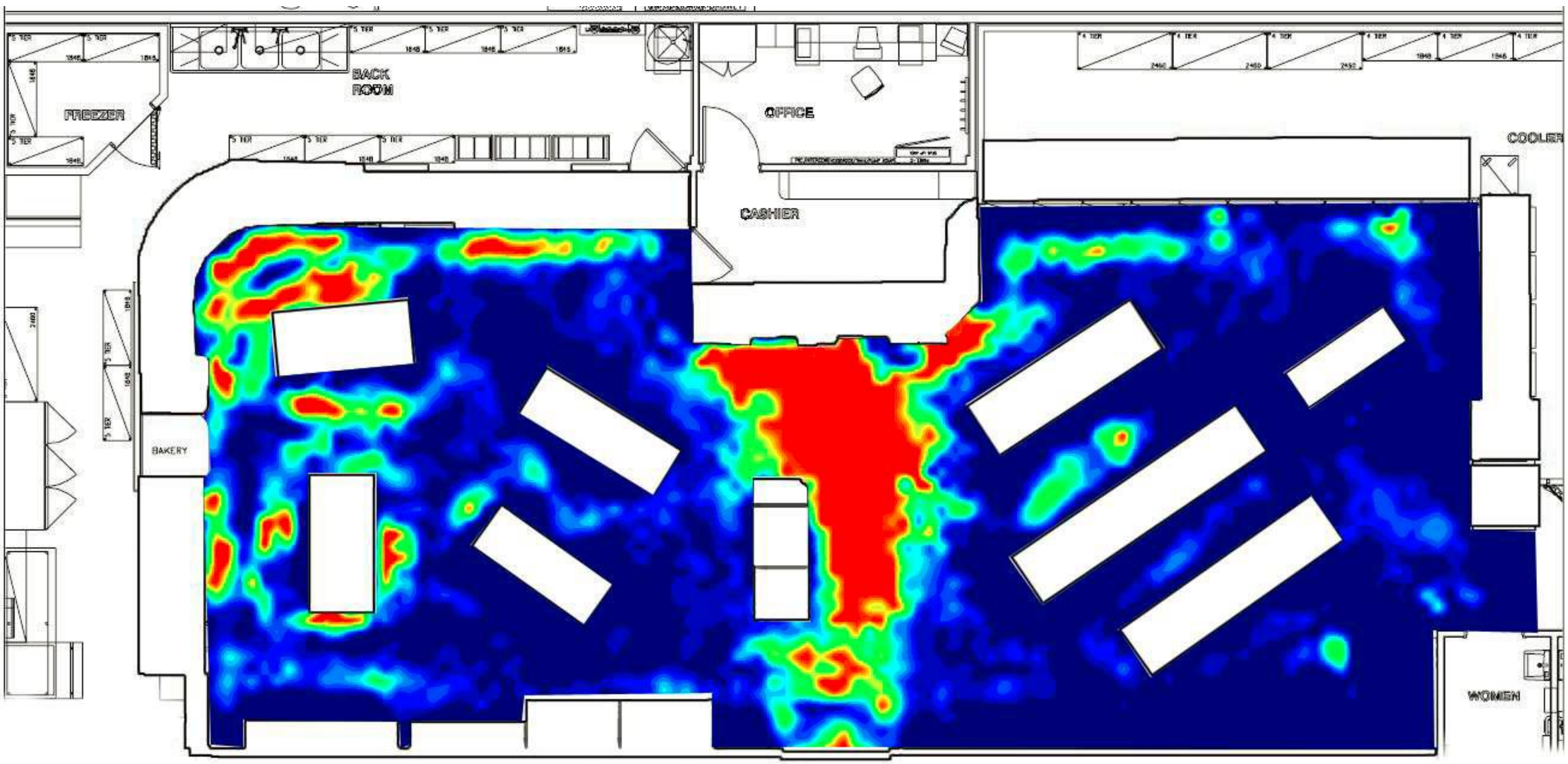
Where Do C-Store Shoppers Spend The Most Time In Store?



Heat map of shopping patterns shows checkout, Coffee, and Food Service are where Shoppers spend most time in store.

Leverage this information to determine best places for Impulse Displays (Salty Snacks)

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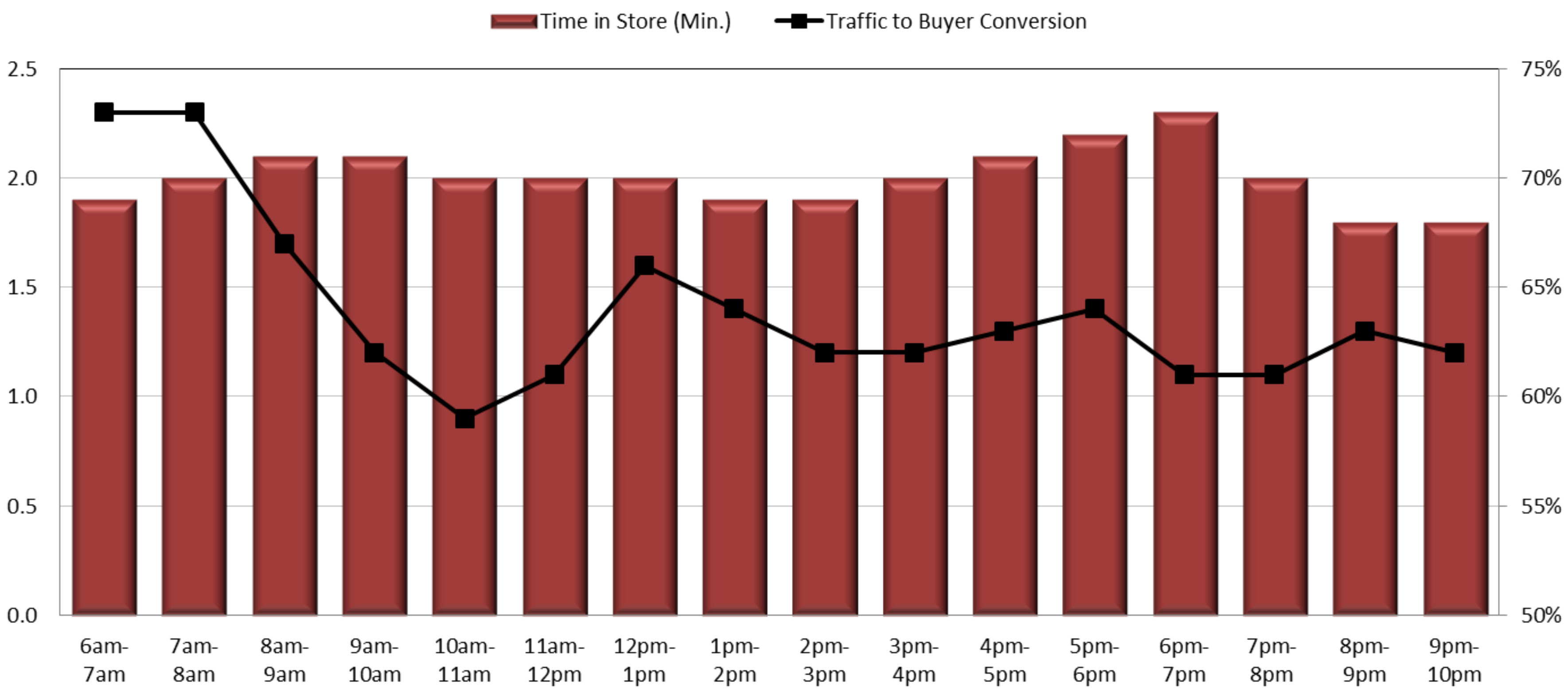
Source: VideoMining deck from NACS Summit April 5 2012

C-Store Shopping Behavior and Conversion

Shoppers spend the most time in store at breakfast and after work
Buyer Conversion is at its highest during breakfast



Breakfast
6am – 9am

Lunch
11am – 2pm

After Work
4pm – 7pm

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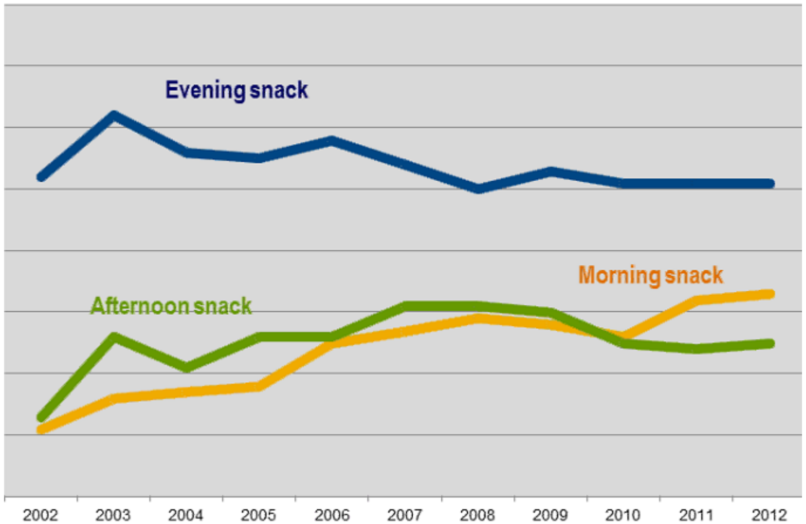
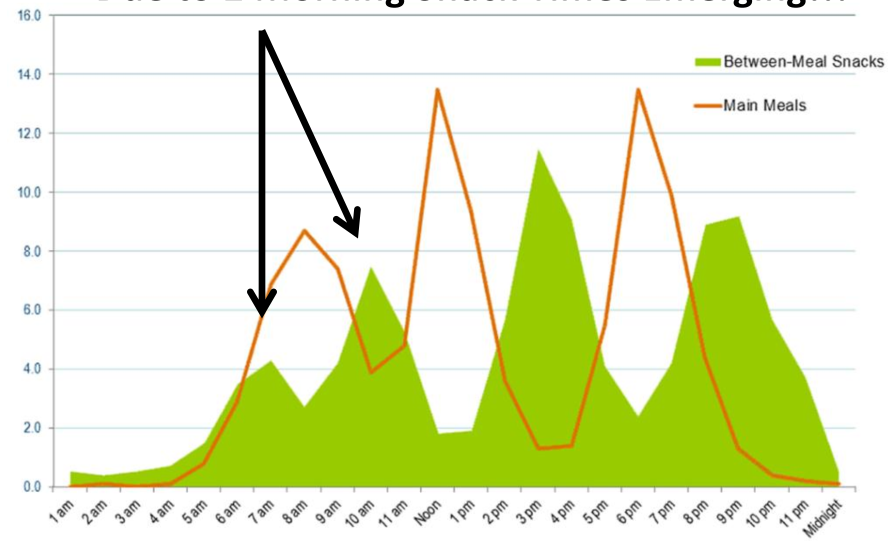
Source: VideoMining deck from NACS Summit April 5 2012

Use High Morning Traffic To Increase Snacking Sales

Morning Snacking is Increasing!!!



Due to 2 Morning Snack Times Emerging!!!



Convenience Stores should be capitalizing on High morning traffic and buyer conversion to convert Snacking opportunities throughout the day

Examples: Buy Coffee and Salty Snack, Get Doughnut for Free
Buy Bottle of Water and Banana, Get Sandwich Crackers Free

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Source: NPD Snacking in America 2012 deck

Snacking Insights

C-Store Gaining Share in Top 10 Largest Snacking Categories

	Grocery	Wal-Mart	C- Store
Yogurt	+0.1	-1.1	+0.2
Crackers	+0.1	-0.6	+0.2
Chocolate Candy	0.0	-1.3	+0.9
Snack/Granola Bars	0.0	-1.0	+0.5
Ice Cream	-0.1	-0.4	+0.2
Cookies	-0.3	-0.3	+0.3
Salty Snacks	-0.5	-0.5	+0.8
Non Chocolate Candy	-0.6	-0.6	+0.5
Pastry/Doughnuts	-1.0	-1.0	0.0
Frozen Novelties	-1.2	-1.2	+0.5

Gains are attributed to less Stock up trip missions and an increase in Quick Trip Missions and On The Go Eating/Snacking

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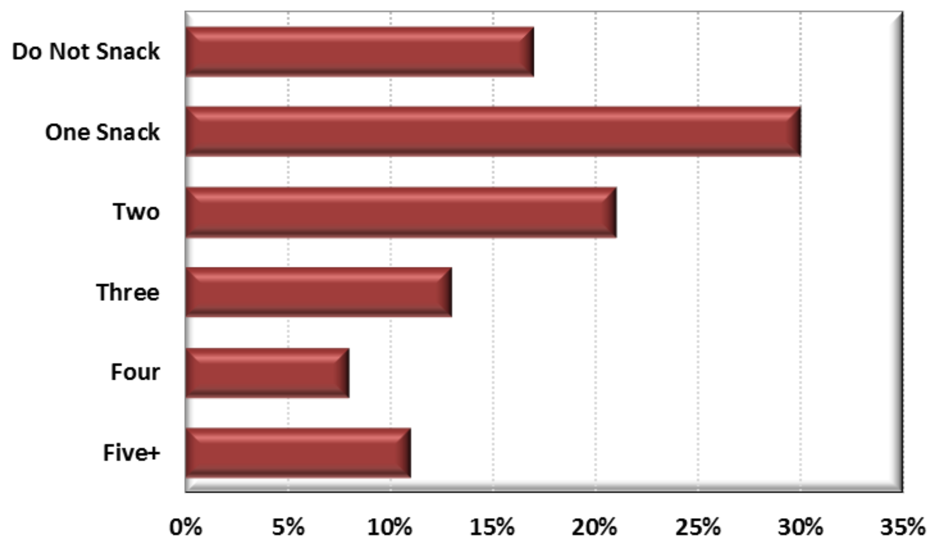
Source: IRI Snaxpo 2012 Deck

53% Snack Two Or More Times Daily

Convenience Stores have an opportunity to convert these snacking occasions

Snacking Frequency on Average Day



62% of kids (2-12 years) are daily multiple-snackers (eat 2+ snacks in an average day)

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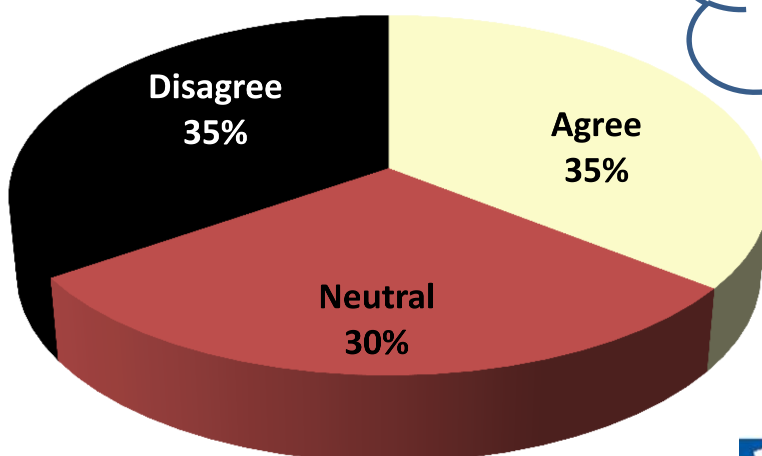
Source: NPD Snacking in America data from March 2012 survey

Place $.99 or Less Display Items In Checkout Area To Capture Impulse Buyers

Suggest placing FEM's with Lowest Avg. Retail Price in Prime Checkout Area locations to increase basket size and ring

Daily Snacking Frequency



"If I am buying a snack to eat right away, I'll choose something that costs less than $1.00"

Source: IRI Snaxpo April 2012 Deck

Hispanic Shopping Insights For Convenience Channel

Hispanics purchase more Dairy/Ice Cream and Less Tobacco than Non Hispanics
Acculturation of Hispanics creates differences in buying behavior

Top 5 Product Categories Purchase in Last 30 Days

Hispanics*	
Non Alchoholic Beverages	62%
Candy/Gum	39%
Salty Snacks	35%
Dairy/Ice Cream	31%
Sweet Snacks	28%

Non-Hispanics	
Non Alchoholic Beverage	62%
Salty Snacks	24%
Candy/Gum	24%
Cigarettes/Tobacco	23%
Sweet Snacks	17%

**Includes Spanish-dominant, bilingual, and English-dominant Hispanics*

n= Hispanics: 1741, Non-Hispanics:2165

Spanish-dominant	
Non Alchoholic Beverages	62%
Candy/Gum	44%
Bread	39%
Dairy/Ice Cream	37%
Salty Snacks	34%

Bilinguals	
Non Alchoholic Beverages	59%
Salty Snacks	37%
Bread	37%
Dairy/Ice Cream	30%
Sweet Snacks	30%

English-dominant	
Non Alchoholic Beverages	64%
Candy/Gum	33%
Salty Snacks	32%
Sweet Snacks	22%
Dairy/Ice Cream	19%

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Source: NPD Group/ Hispanic C-Store Shopper May 2012

Snack Category Review

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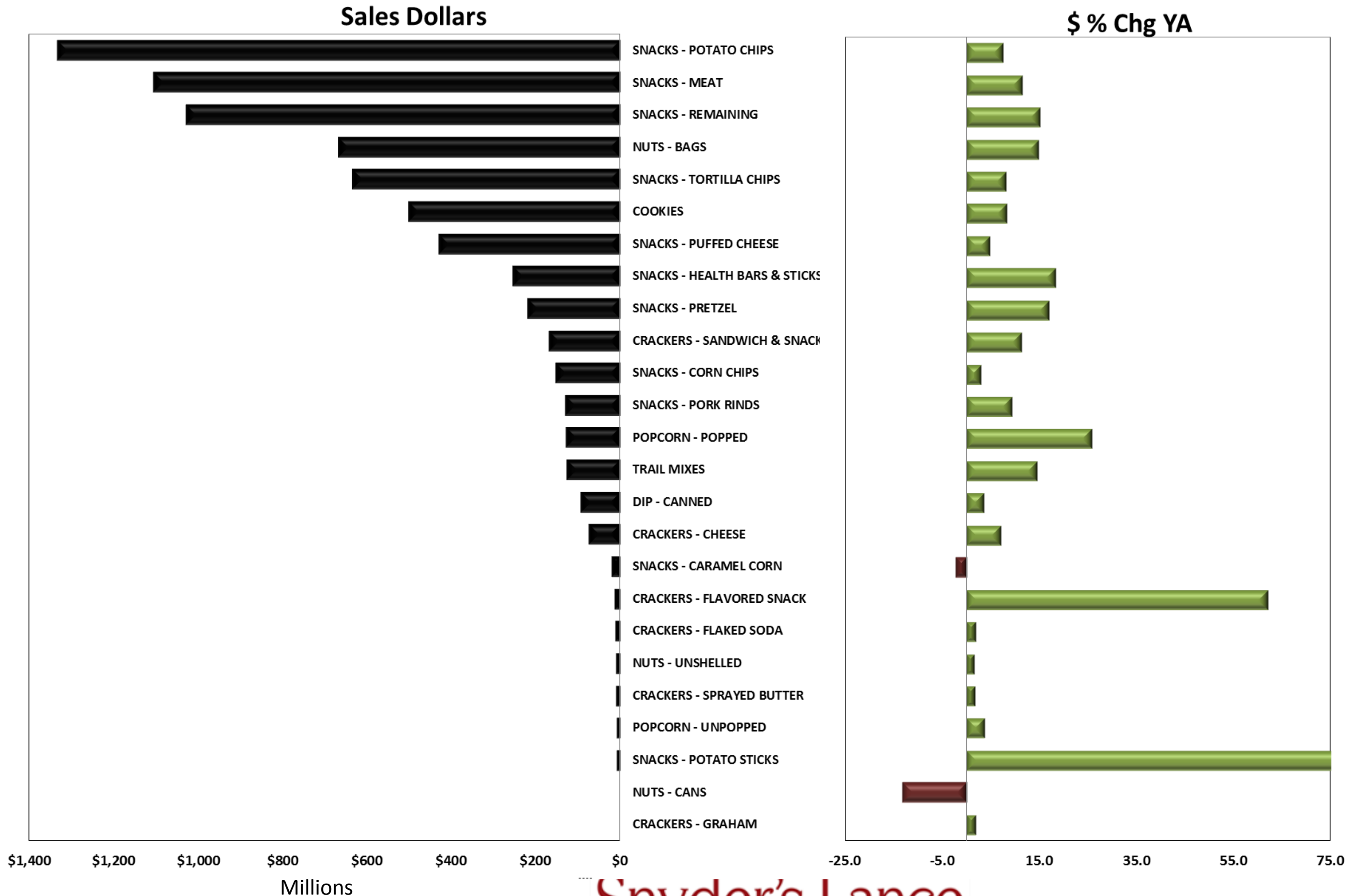
Snacks Continue To Grow In Convenience Channel

- Total Snack Category in Convenience Channel is $7.2B, up 11% in Dollars
- **Canned Nuts and Caramel Corn only segments not growing (reduce space for growing categories)**
- Perceived Healthier categories (Nuts, Health Bars, Popped Popcorn) are up 15-26%
- Potato Stick Category growth due to Lay's Snack Stick
- Flavored Crackers growth due to Cheez-it Duoz



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Source: Nielsen Scantrack Conv. Total US 52 weeks ending 12/22/12

Top 3 Brands Are Critical For Segment Success

Total U.S.

       

Potato Chips $1,336 MM	Nuts (Bagged) $670 MM	Tortilla Chips $637 MM	Cheese Puffs $432 MM	Pretzels $221 MM	Sandwich Crackers $ 171 MM	Pork Skins $133 MM	Popped Popcorn $130 MM
Lays #1 (+8.8%)	Frito #1 (-9.6%)	Doritos #1 (+4.8%)	Cheetos #1 (+4.3%)	Combos #1 (+24.5%)	Keebler #1 (+20.9%)	Baken-ets #1 (+0.5%)	Smart Food #1 (+13.2%)
Ruffles #2 (+0.4%)	Planters #2 (+10.9%)	Tostitos Scoops #2 (+2.9%)	Golden Flake #2 (+98.6%)	Snyder's of Hanover #2 (+12.4%)	Frito Lay Munchies #2 (+22.4%)	Golden Flake #2 (+17.3%)	Chester's #2 (+161%)
Pringles #3 (+10%) *Cape Cod #12 (+11%)	David #3 (+3.6%) *Lance #7 (+12.9%)	Tostitos #3 (-2.4%)	Herr's #3 (+10.2%)	Rold Gold #3 (-5.1%)	Lance #3 (-9.6%)	Turkey Creek #3 (+25.6%) *Tom's #4 (+11.6%)	Lance #3 (+46.4%) *Okedoke #5 (+10.2%)

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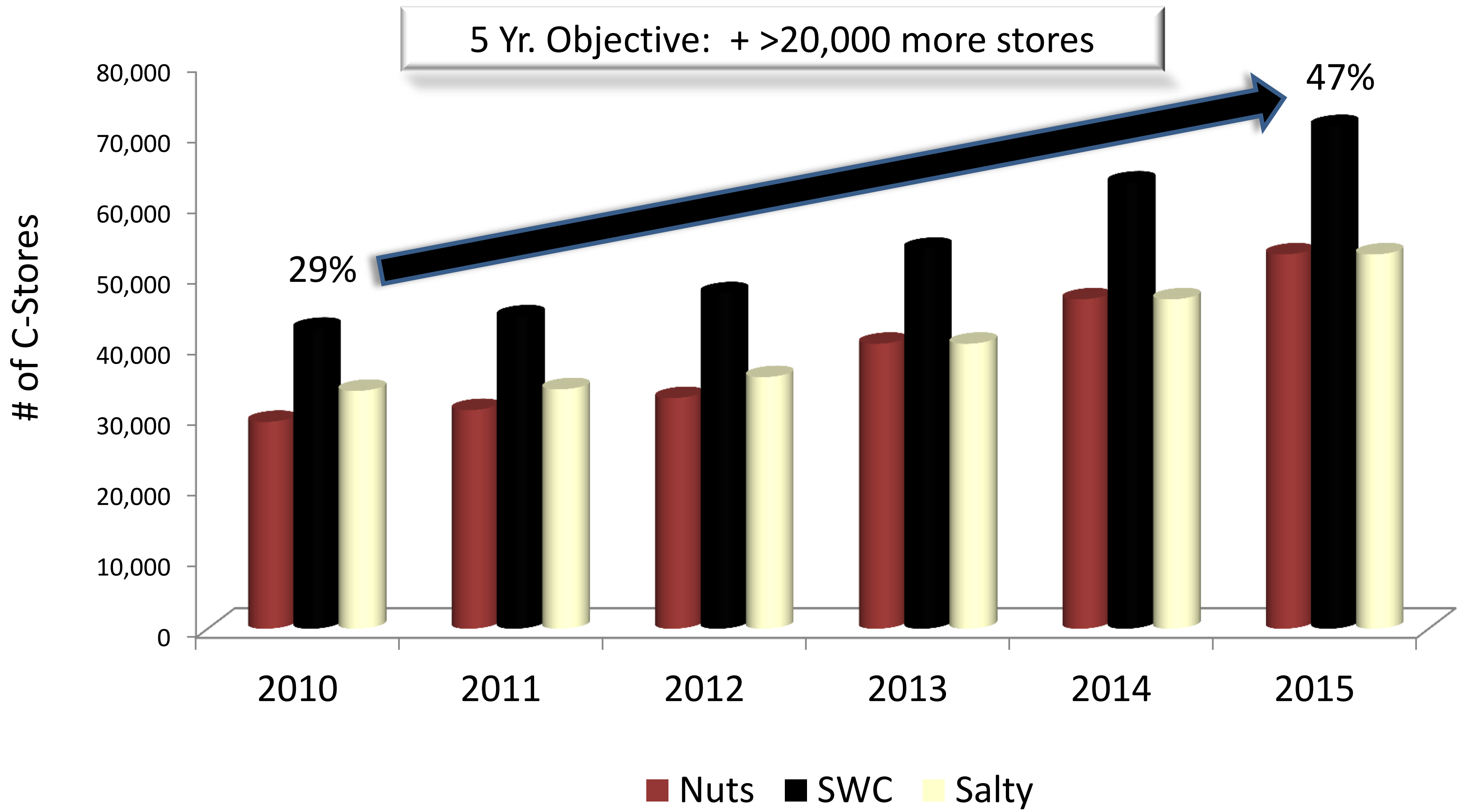
Source: Nielsen Total U.S. C Store Brand Rank 52 w/e 12/22/12

Snyder's-Lance Is Building A Stronger Footprint Nationally In Convenience Stores



Source: S-L Sales History/Forecast Internal Data

Pretzels

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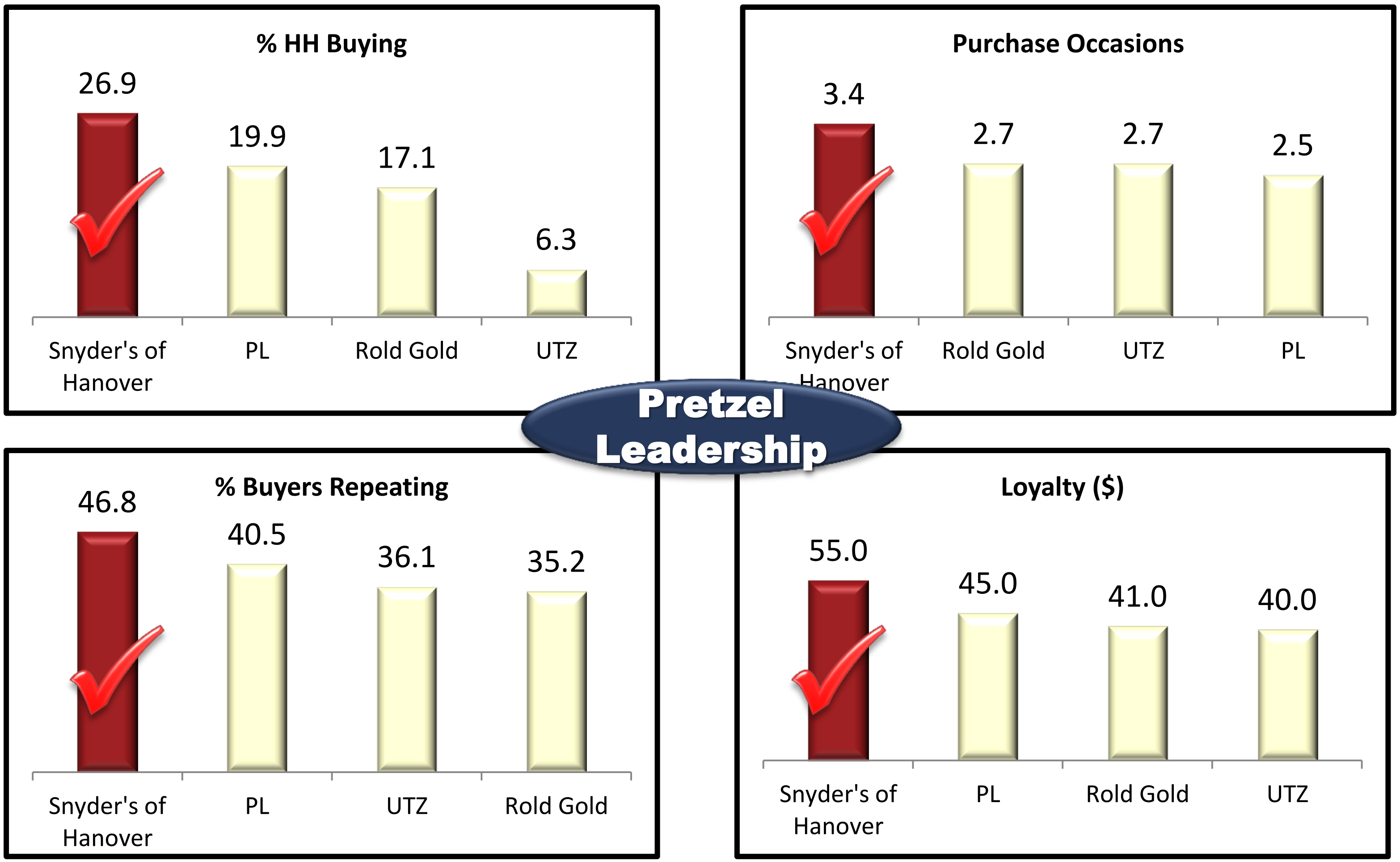
Nationally, Shoppers Select Snyder's Of Hanover Pretzels



Source: IRI Homescan Panel Data, Total US- All Outlets: 52 Weeks ending 9/30/12

Snyder's Of Hanover Pretzels Are Best In Class!

Market leader in Pretzels

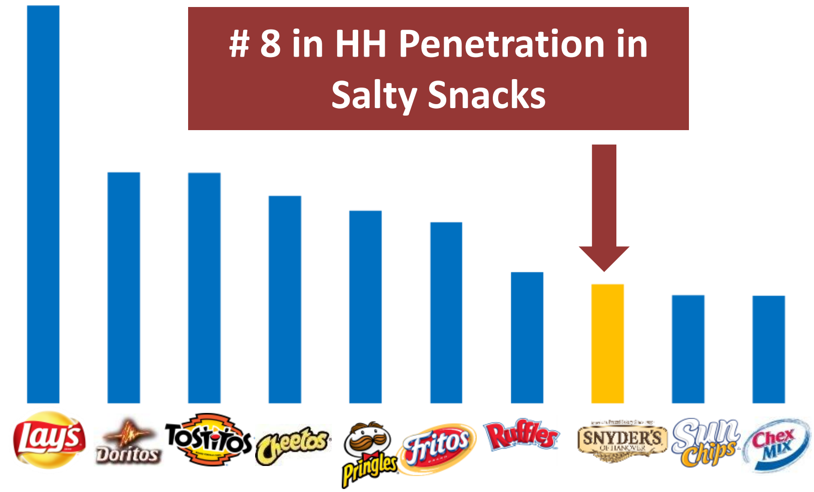
- #1 in dollar share
- #1 in HH penetration
- #1 in frequency and loyalty

Strong Consumer Support:

- National television advertising

New Product News in 2012

- Pieces in tubes for c-stores
- Bacon Cheddar pieces for grocery
- Gluten Free Mini's

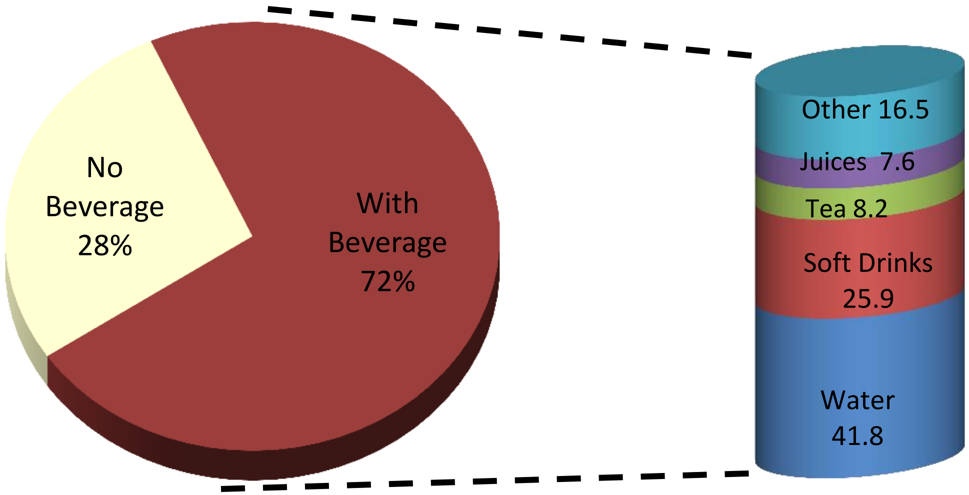


Source:, Nielsen HHP 52 wk. end 12/2011

Promote Snyder's of Hanover Pretzel Pieces With Water and Soft Drinks

How often are SOH Pieces Consumed with a Beverage?

Which Beverages Are Consumed Most With SOH Pieces?



- ✓ 72% of the time, SOH Pieces are consumed with a beverage
- ✓ Water and Soft Drinks make up 2/3 of those occasions, making them a nice pairing to bundle for promotions

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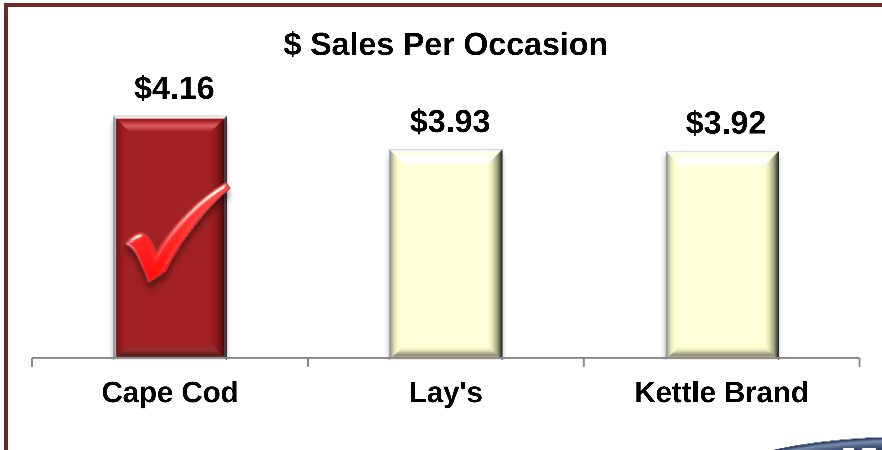
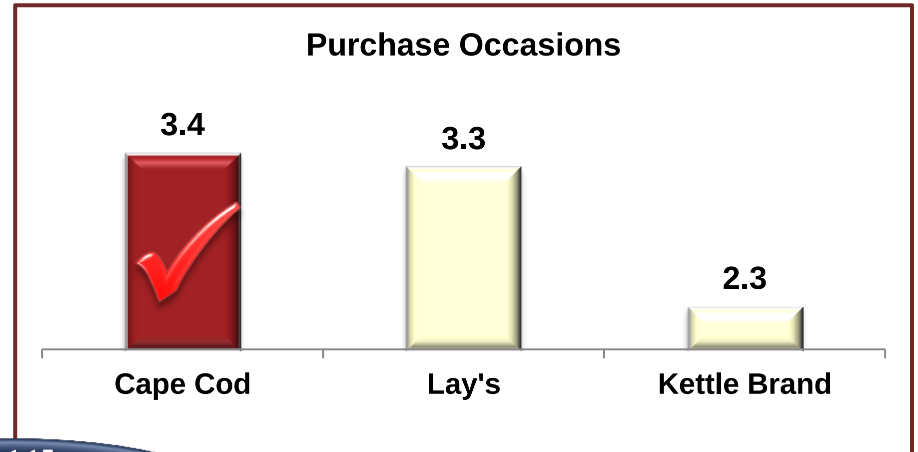
*Source: The NPD Group/SnackTrack; 2 yrs ending Mar '12

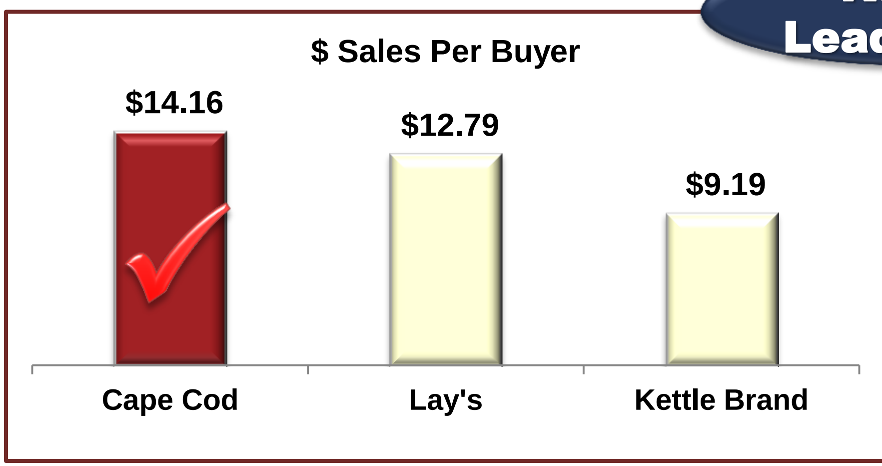
Kettle Chips

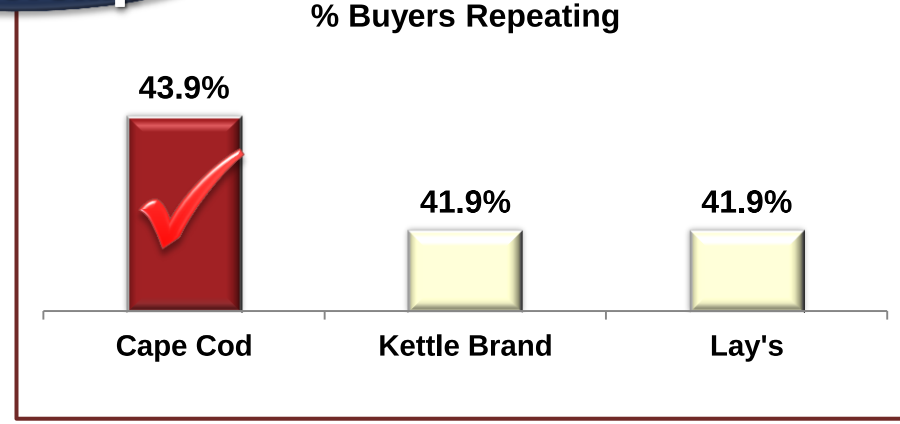
Nationally, Shoppers Also Select Cape Cod Kettle Chips





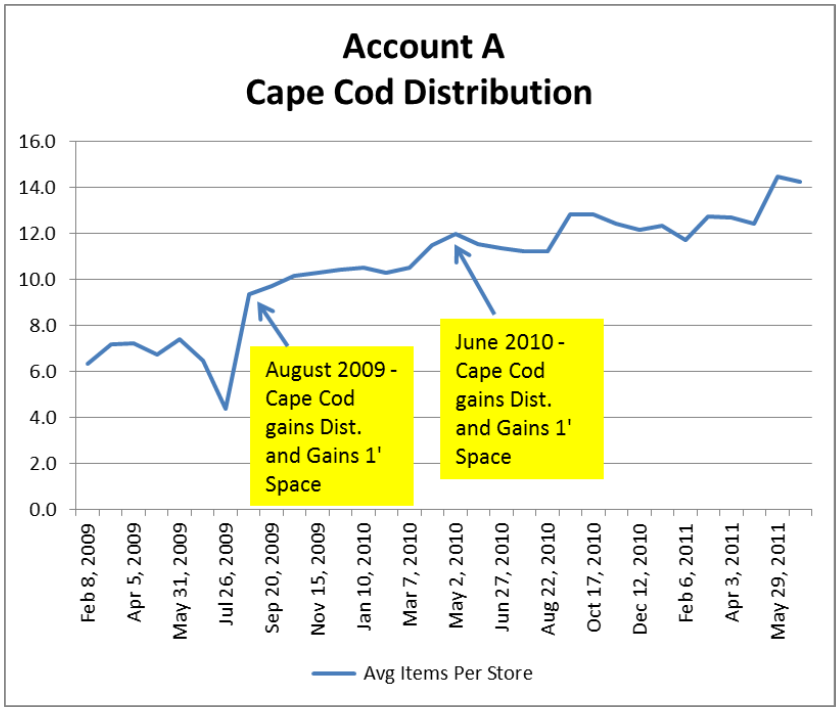
Kettle Leadership

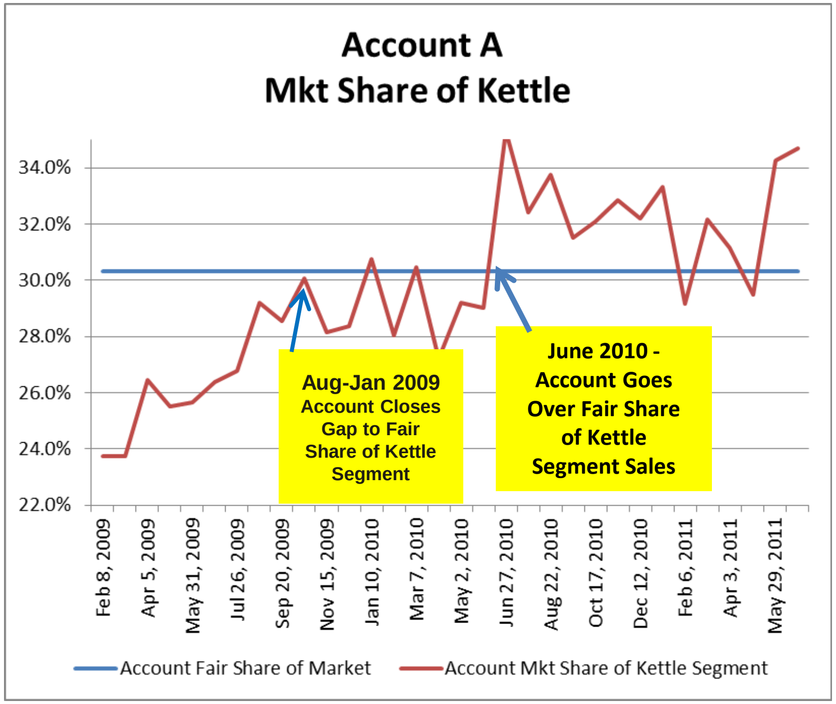




Source: Nielsen Homescan Panel Data, Total US- All Outlets: 52 Weeks ending 9/30/12

Cape Cod Distribution Helps Kettle Category Growth





Account A increased distribution & space of Cape Cod twice, and each time improved its Market share, outpacing the competitive market

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Source: IRI- Acct A (Mid-Atlantic Retailer) 4 Week Periods

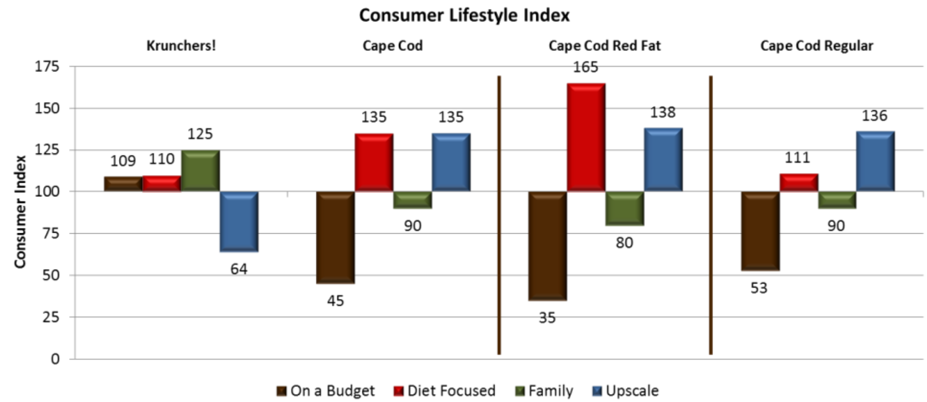
Krunchers! Has Unique Positioning And Appeals To Different Shoppers Than Cape Cod

Unique Consumer

- All Family
- Slightly Younger
- Less HH income than Cape Cod
- Larger households
- Only 6% overlap in buyers with Cape Cod
- Skews Midwest

Unique Positioning

- Owns Crunch!!!
- Bold flavors



Krunchers!

BehaviorStage	Cosmopolitan Centers	Affluent Suburban Spreads	Comfortable Country	Struggling Urban Cores	Modest Working Towns	Plain Rural Living	Total
Start-Up Families - HHs with Young Children Only < 6	79	86	121	81	114	74	93
Small Scale Families - Small HHs with Older Children 6+	75	188	145	71	110	78	116
Younger Bustling Families - Large HHs with Children (6+), HOH <40	114	131	222	87	142	72	127
Older Bustling Families - Large HHs with Children (6+), HOH 40+	92	135	221	71	116	117	133
Young Transitionals - Any size HHs, No Children, < 35	51	91	113	85	105	113	91
Independent Singles - 1 person HHs, No Children, 35-64	67	87	101	76	88	57	78
Senior Singles - 1 person HHs, No Children, 65+	46	52	71	33	51	50	51
Established Couples - 2+ person HHs, No Children, 35-54	93	121	130	92	151	85	114
Empty Nest Couples - 2+ person HHs, No Children, 55-64	111	152	119	102	108	96	117
Senior Couples - 2+ person HHs, No Children, 65+	104	100	86	67	89	74	87
Total	80	119	133	77	104	80	100

Cape Cod

BehaviorStage	Cosmopolitan Centers	Affluent Suburban Spreads	Comfortable Country	Struggling Urban Cores	Modest Working Towns	Plain Rural Living	Total
Start-Up Families - HHs with Young Children Only < 6	74	110	98	79	78	40	80
Small Scale Families - Small HHs with Older Children 6+	162	157	144	73	79	50	108
Younger Bustling Families - Large HHs with Children (6+), HOH <40	54	83	84	84	67	47	69
Older Bustling Families - Large HHs with Children (6+), HOH 40+	90	173	134	136	92	100	127
Young Transitionals - Any size HHs, No Children, < 35	68	73	60	65	62	71	66
Independent Singles - 1 person HHs, No Children, 35-64	83	107	76	58	66	65	74
Senior Singles - 1 person HHs, No Children, 65+	55	85	70	44	61	28	54
Established Couples - 2+ person HHs, No Children, 35-54	139	121	115	73	126	74	109
Empty Nest Couples - 2+ person HHs, No Children, 55-64	175	206	165	103	134	77	147
Senior Couples - 2+ person HHs, No Children, 65+	149	184	189	89	146	99	146
Total	104	141	122	78	90	66	100

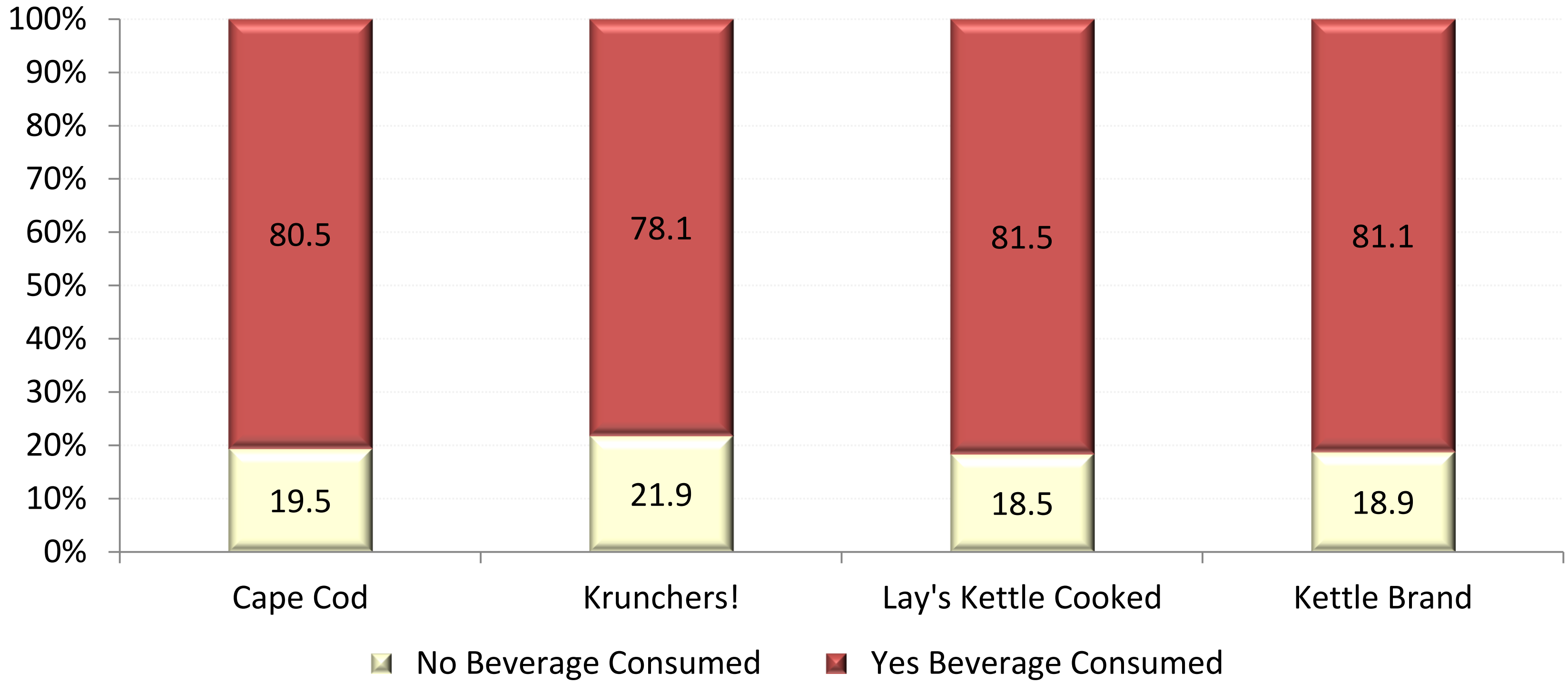
Source: National Retailer Loyalty Card data (26 w/e 05/10/12); Spectra June 2012 Profiles

Beverage Accompaniment Profile for Kettle Chips

% of Eatings

- **When kettle chips are consumed, 8 out of 10 times a beverage is present**

Promote drinks along with Kettle Chips to increase ring



Source: The NPD Group/SnackTrack; 2 yrs ending Mar '12

Snyder's-Lance Delivers Brands To Satisfy Consumer Needs

Kruncher's! Brand Buyers Prefer To Consume With Soft Drinks, While Other Kettle Brand Buyers Prefer To Consume With Water

	Cape Cod (sorted)	Krunchers!	Lay's Kettle Cooked	Kettle Brand
Yes Beverage Consumed	80.5	78.1	81.5	81.1
Water - Total	28.5	17.9	26.6	35.4
Water (tap)	18.1	*8.4*	14.2	26.4
Water (bottled/sparkling)	10.3	*9.5*	12.4	9.0
Soft Drinks - Total	19.0	26.4	24.5	20.9
Soft drink-diet	9.7	*12.0*	12.1	11.9
Soft drink-regular	9.3	*14.4*	12.4	9.0
Tea - Total	13.1	*6.0*	11.5	7.4
Iced tea	12.3	*4.7*	9.7	6.5
Hot tea	*0.8*	*1.4*	*1.8*	*0.9*
Alcohol - Total (adults)	*6.8*	*8.7*	3.2	6.1
Wine /Cocktail/Mixd drnk	*3.6*	*4.5*	*1.4*	*1.5*
Beer / ale	*3.1*	*4.2*	*1.8*	*4.5*
Fruit juice/fruit drink/ade	5.4	*6.3*	4.7	3.5
Milk	*2.5*	*3.7*	5.5	*1.7*
Coffee	*1.5*	*4.6*	*1.0*	*1.0*
Sports drink	*1.0*	*0.2*	*1.5*	*1.1*
Energy drink	*0.7*	*0.2*	*0.6*	*0.3*
Smoothie	*0.1*	*0.6*	*0.1*	*0.2*
Other beverage	*2.0*	*3.5*	2.3	*3.4*

Source: The NPD Group/SnackTrack; 2 yrs ending Mar '12

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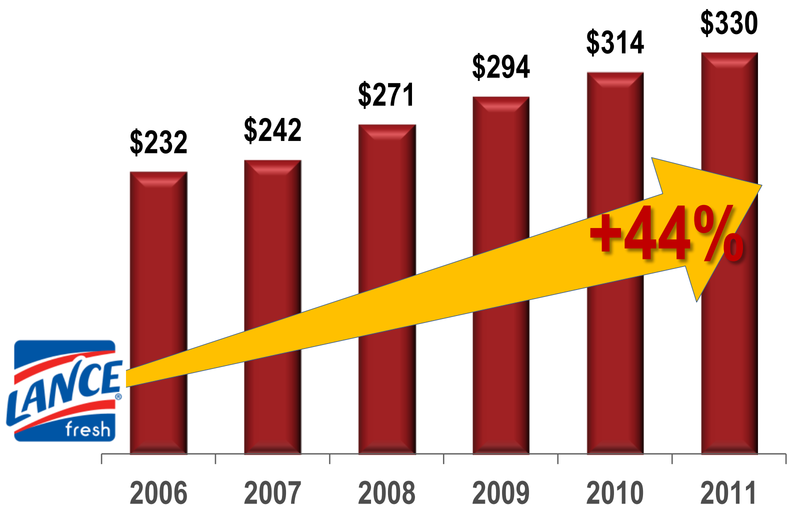
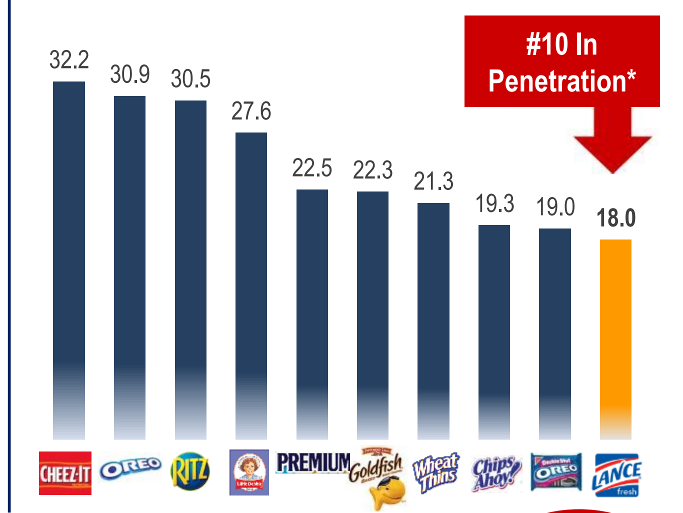
Cells in italics have <35 users, use directionally.

Sandwich Crackers

Lance Is The Dominant Brand In Sandwich Crackers

- # 1 in Dollar Share
- # 1 in Household Penetration
- # 1 in Loyalty
- # 1 in Frequency
- # 1 in Buying Rate
- Highest Velocity
  - 2.5 times faster than next competitor
- Top Ranked Items
  - 15 of top 25 are Lance items





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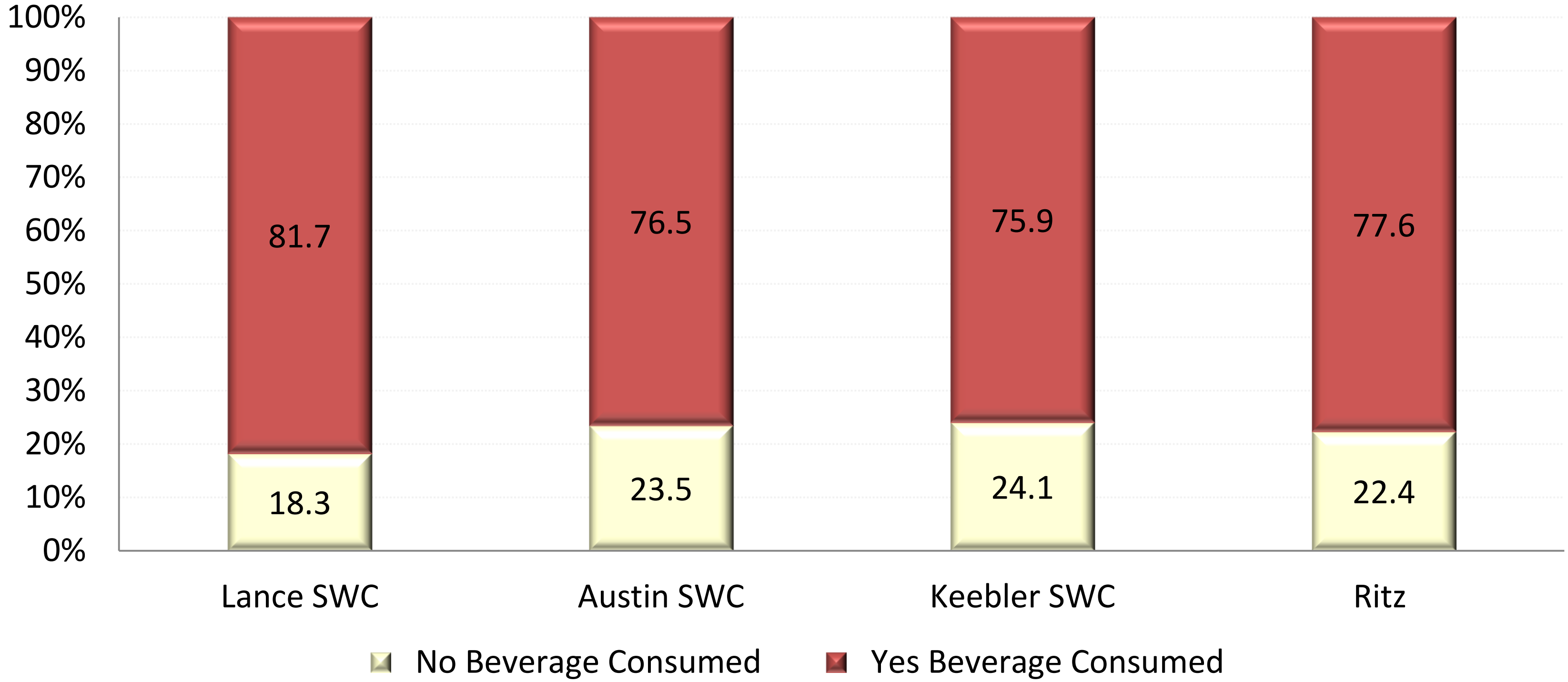
Source: Internal Sales Dec 2011, Nielsen HHP 52 wk. end 12/2011

Beverage Accompaniment Profile for Sandwich Crackers

% of Eatings

- **Lance sandwich crackers are more likely to be consumed with a beverage than any of the other sandwich cracker brands**
  Promote Lance with a beverage to increase basket ring



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Source: The NPD Group/SnackTrack: 2 yrs ending Mar '12

What Beverages Are Most Often Consumed With SWCs?

Water is the most common beverage to be consumed with all brands.
Lance has the strongest consumption with soda, pointing to possible co-promotion opportunities with bottled water and regular/diet sodas.

	Lance SWC (sorted)	Austin SWC	Keebler SWC	Ritz
Yes Beverage Consumed	81.7	76.5	75.9	77.6
Water - Total	29.7	30.1	29.5	29.9
Water (tap)	17.0	18.0	16.9	14.6
Water (bottled/sparkling)	12.7	12.1	12.7	15.4
Soft Drinks - Total	21.4	16.2	15.2	11.1
Soft drink-regular	12.6	9.6	9.9	7.9
Soft drink-diet	8.7	6.6	*5.4*	*3.2*
Coffee	7.8	6.2	*4.4*	*5.3*
Tea - Total	7.5	6.3	*4.8*	*5.5*
Iced tea	6.7	4.7	*3.4*	*5.3*
Hot tea	*0.7*	*1.6*	*1.4*	*0.2*
Fruit juice/fruit drink/ade	6.5	9.8	9.0	12.1
Milk	4.4	4.2	7.1	7.0
Other beverage	1.7	2.0	*2.8*	*1.2*
Alcohol - Total (adults)	*1.4*	*0.1*	*0.2*	*3.1*
Beer / ale	*0.8*	*0.0*	*0.2*	*2.7*
Wine /Cocktail/Mixd drnk	*0.7*	*0.1*	*0.1*	*0.4*
Sports drink	*0.8*	*0.9*	*1.2*	*1.6*
Energy drink	*0.4*	*0.5*	*0.2*	*0.2*
Smoothie	*0.1*	*0.2*	*1.4*	*0.4*

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Source: The NPD Group/SnackTrack; 2 yrs ending Mar '12

Cells in italics have <35 users, use directionally.

How Long After Purchase Are Sandwich Crackers Consumed?

Lance Sandwich Crackers are more likely to be an impulse item, so consider displaying them near checkout and in high traffic areas to capture those impulse buyers.

	Lance SWC	Austin SWC	Keebler SWC	Ritz
30 min or less before eating it	8.5	4.1	*6.2*	6.8
31 min to less than 1 hour	*2.4*	*1.3*	*1.6*	*3.2*
1 to 24 hours before eating	12.6	6.7	9.3	14.3
More than a day before eating	68.5	79.3	75.6	61.9
Don't know	7.1	7.7	6.5	10.4
Not Reported	*1.0*	*0.9*	*0.7*	*3.5*

Most Impulsive

Source: The NPD Group/SnackTrack; 2 yrs ending Mar '12

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Cells in italics have <35 users, use directionally.

Popcorn & Nuts

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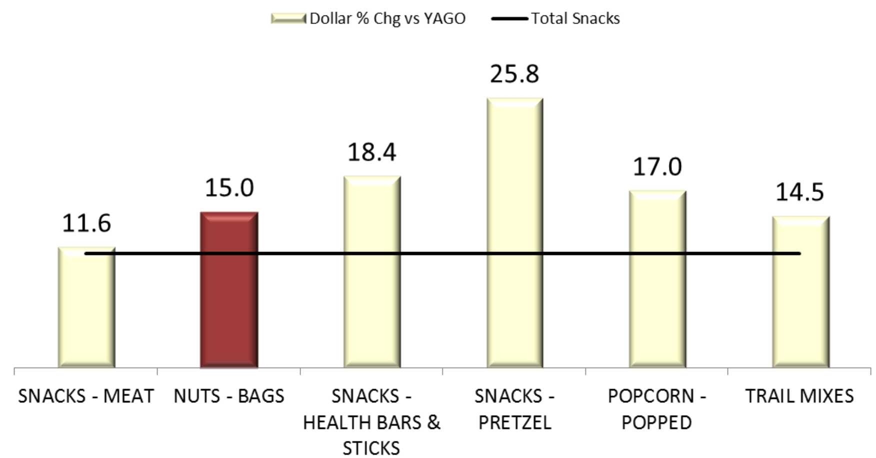
Nut Category Is Riding Health/Wellness Trend

- **Category sales of $656MM**
  - Category is #4 in all Salty Convenience Categories
  - Lance brand currently holds #7 share position i nuts ($24MM in sales, +12.9%)

- **Snyder's-Lance is positioned for growth with national DSD and prime real estate in-store (our FEM!)**

- **Nuts are on-trend and growing**
  - Perceived as healthier, more filling snacks with protein
  - Over-index to Hispanic consumers
  - Nuts offer an innovation platform to attract new consumers
  - Premium nuts, mixes, flavors all have innovation potential

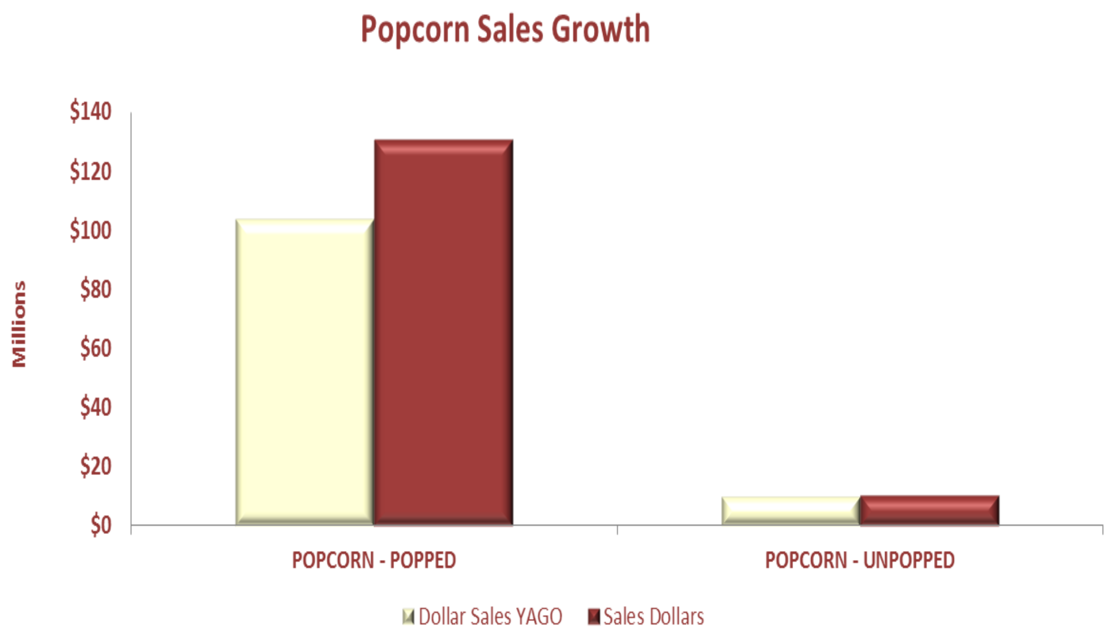
Perceived Healthier Categories Outperforming Total Snacks



Source: Nielsen Scantrack Conv. Total US 52 weeks ending 12/22/12

Popped Popcorn Is Also On Trend For Health/Wellness and Growing !!!

- **Category sales of over $130MM (+25.8%)**
  - ➢ Lance brand currently holds #3 share position in popcorn ***<u>($10MM in sales +46.4%)</u>***
- **Snyder's-Lance is positioned for growth with national DSD and prime real estate in-store (our FEM!)**
- **Popcorn is on-trend and growing**
  - ➢ Perceived as healthier
  - ➢ O-Ke-Doke over-indexes to African American consumers, Midwest



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Source: Nielsen Scantrak Convenience Total US data ending 12/22/2012

Innovative Ways To Attract/Retain Shoppers

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Nice N' Easy Looks To Wegmans Recipe For Success

Complete Meals To Go

Source: Convenience Store News & Nice N Easy

Sunoco Craft Beer Experiment Expanding In New York

CSNews reported on Nov. 15, 2011—

"Sunoco launched the Craft Beer Exchange at 12 locations in the Buffalo area this summer. Now, based on the results of the pilot program, the company is bringing its craft beer initiative to eight more locations in the Rochester and Buffalo markets, according to a company release."

Source: The Tonawanda News, CSNews 929jackfm, KegWorks & Craft Beer Exchange

Amazon Lockers For Product Pick Up at 7-11 and Rite Aid

Urban residents who can't be home to sign for a package delivery, can now go to a local retailer, pick up their package, and hopefully a few other items while in the store

MorningNewsBeat.com reported on Aug. 1, 2012

Originally, the locker program was being tested in Seattle and London. But now, according to reports, the test has been expanded to New York, Washington, DC, and the Silicon Valley.

Source: Kantar Retail IQ (photos)

"Shop 24" – Targeting Campus and Apartment Complexes

Toledo Blade reported on Feb. 15, 2012—

"About the size of an enclosed bus stop, the robotic kiosk is a self-contained, refrigerated vending machine that can carry up to 200 items. It is restocked daily with such staples as toiletries, cleaning supplies, and perishables that include fresh milk, bread, fruit, and ground beef. It accepts cash, debit cards, credit cards, and federal supplemental nutrition-assistance program cards."

Source: Shop 24 Global LLC on Facebook

Turkey Hill Supersizes

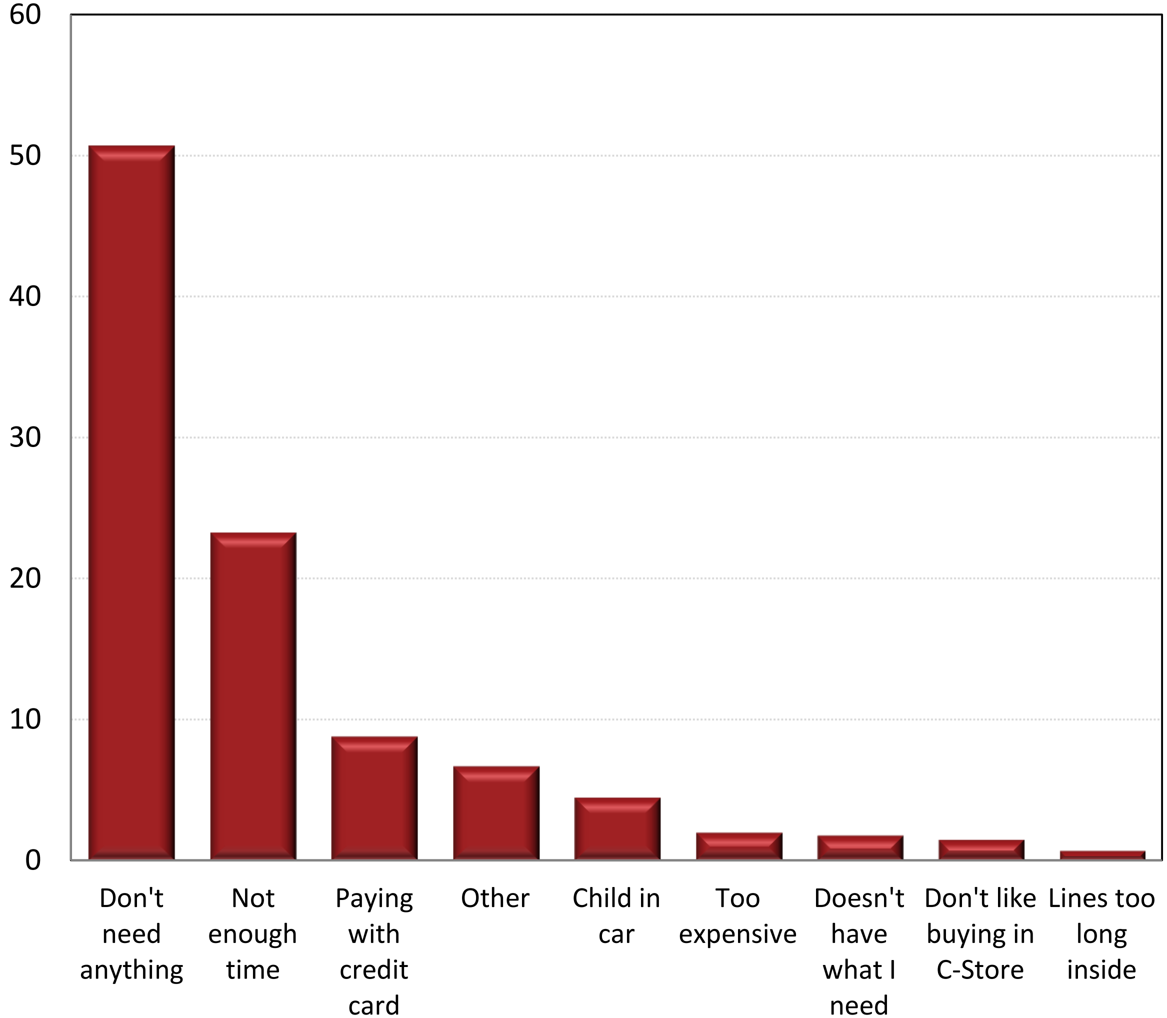
TurkeyHill

Columbus Business First reported on
Sep. 14, 2012—

“**Kroger supersizes latest Turkey Hill market to be more like grocery stores…** *At 6,800 square feet, it is almost 75 percent bigger than the typical 4,000-square-foot Turkey Hill. The goal is to be more like a grocery store – wider product selection, fresh produce and meat – but still with the grab-and-go hallmarks of a gas station. It also has new breakfast, lunch and dinner menus that include build-your-own bistro-style sandwiches, wraps, bowl, fried chicken and pizza.”*

Bring Vending To The Gas Island To Increase Sales

Why aren't you entering store today?



- Captures additional sales
- Adds consumer convenience
- Price products higher than in store to encourage shopping in store

Source: NACS Convenience Store Tracking Survey, October 2012 Issue

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Summary/Actions

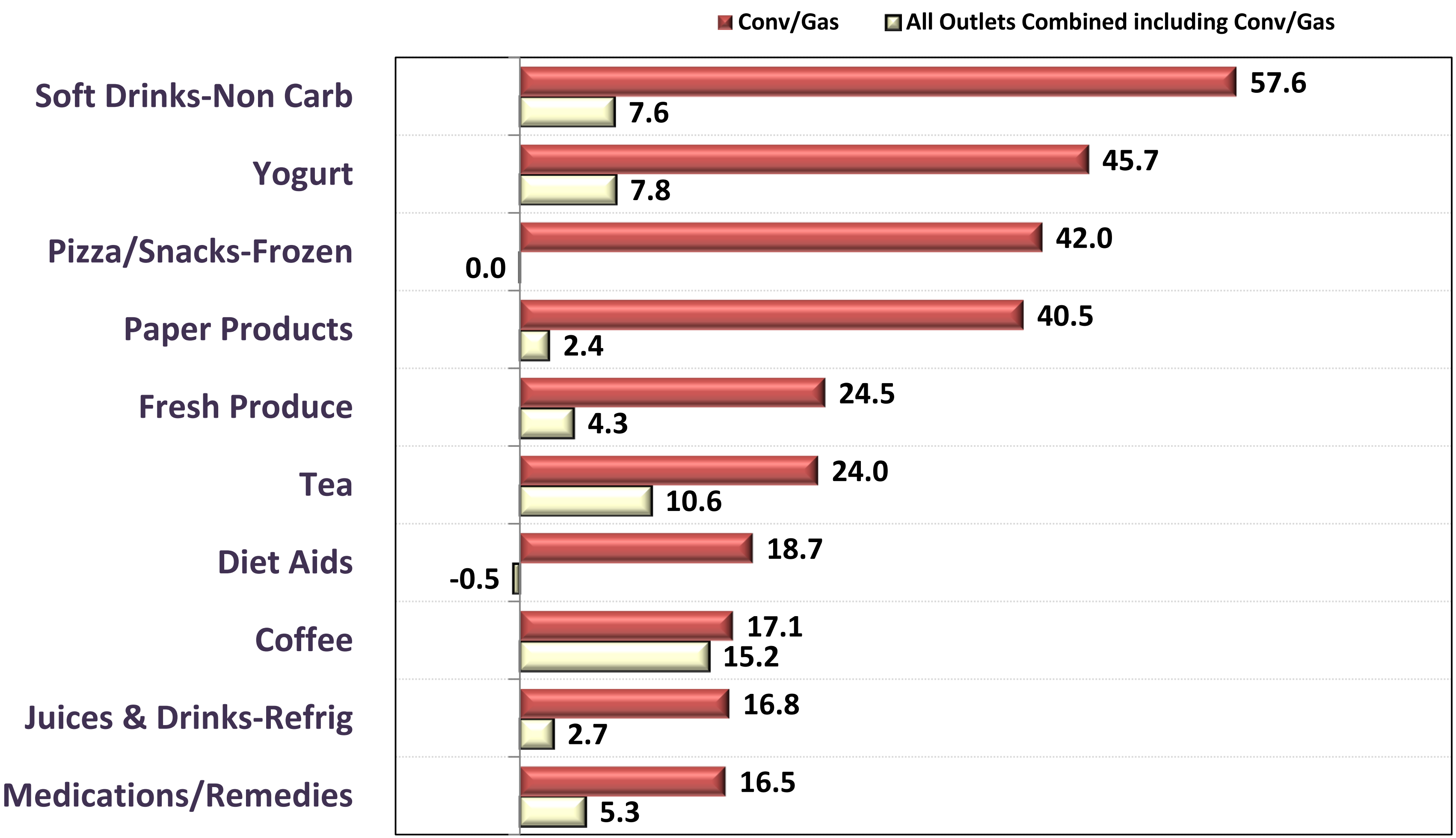
- Snacks are vital to the growth and overall performance of the C-Store Market
- Knowing your shopper and what they want is key to maximizing $ per sq/ft
- Almost all Snack categories continue to grow year over year
- Snyder's of Hanover #1 Pretzel Brand in HHP, Loyalty, Buying Rate
- Kettle Chips continue to be a hot trend and are gaining enthusiasm with shoppers
- Cape Cod shoppers are very loyal, purchasing more each trip and shopping more often
- Promote Kettle Chips/Pretzels with Beverages to increase basket ring
- Incorporate Nuts and Popped Popcorn into Displays to take advantage of Health/Wellness trends
- Use high morning traffic to convert shopper's morning and afternoon snacking needs

Thank you!

Appendix

Fastest Growing C-Store Categories in % Dollar Sales

Consumers are showing that convenience matters as these categories are outpacing growth in All Outlets

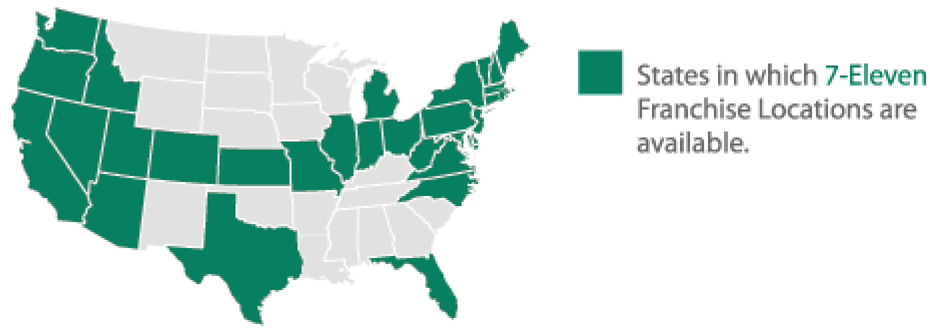


Source: Nielsen Scantrack, Total U.S.; *Categories w/ sales of $50 million+ in C-Store Channel, 52 weeks ending 11/24/2012 (vs. prior year)

7-Eleven Climbs To 44,600 Stores In 16 Countries
9,100 Are In North America

- 1927 – First store
- 1952 – 100 stores
- 1963 – 1,000 stores
- 1984 – 10,000 stores
- 2003 – 25,000 stores
- 2010 – 40,000 stores
- 2012 – 44,600 stores

Franchise locations



More Competition For Quick Trip Dollars

Source: 7-Eleven

Available in Nielsen Reports Folder – CDI/BDI Report
All S-L Brands and Key Competitors

SANDWICH CRACKERS DEVELOPMENT INDEX / SHARE TABLE

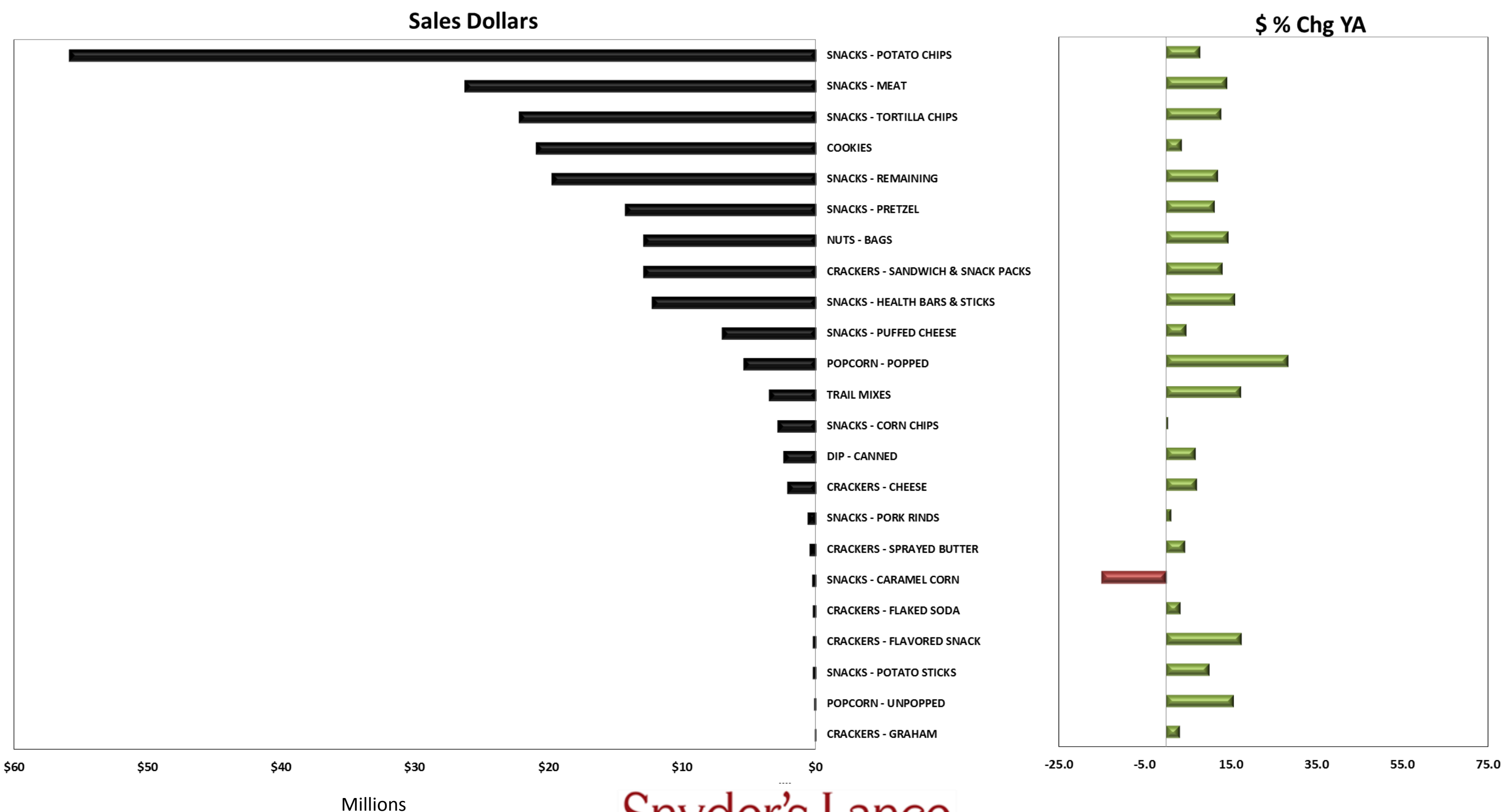
Source: Nielsen Scantrack Data
LATEST 52 WE MAR1712.4

Return to Home Page

	Sandwich Crackers	Lance		Cracker Creations		Keebler		Crackerfuls	
	Category Develop Index	Brand Develop Index	$ Share of Category	Brand Develop Index	$ Share of Category	Brand Develop Index	$ Share of Category	Brand Develop Index	$ Share of Category
TOTAL US - FOOD OVER $2 MILLION			**40.8**		**1.2**		**25.5**		**10.8**
ALBANY $2 MM	98	16	6.8	44	0.5	192	49.9	111	12.3
ATLANTA $2 MM	148	186	51.3	200	1.6	89	15.3	123	9.0
BALTIMORE $2 MM	151	172	46.4	123	1.0	134	22.5	168	12.0
BIRMINGHAM $2 MM	172	253	60.0	89	0.6	72	10.7	57	3.6
BOSTON $2 MM	167	26	6.3	52	0.4	282	43.0	142	9.2
BUFFALO/ROCHESTER $2 MM	96	51	21.9	82	1.0	189	50.2	104	11.7
CHARLOTTE $2 MM	308	619	82.0	326	1.2	34	2.8	175	6.1
CHICAGO $2 MM	51	30	23.8	18	0.4	84	41.9	103	21.8
CINCINNATI $2 MM	132	60	18.4	244	2.2	182	35.1	126	10.3
CLEVELAND $2 MM	117	112	38.7	175	1.7	145	31.5	107	9.9
COLUMBUS $2 MM	113	61	22.1	169	1.8	139	31.4	97	9.3
DALLAS $2 MM	77	61	32.1	176	2.7	76	25.0	64	8.9
DENVER $2 MM	60	10	6.8	65	1.3	119	50.5	93	16.8
DES MOINES $2 MM	42	2	1.6	0	0.0	66	40.1	76	19.5
DETROIT $2 MM	107	52	19.7	216	2.4	154	36.6	153	15.5
GRAND RAPIDS $2 MM	99	73	29.9	103	1.2	119	30.5	141	15.4
HARTFORD/NEW HAVEN $2 MM	137	38	11.2	47	0.4	272	50.4	141	11.1
HOUSTON $2 MM	87	58	27.0	87	1.2	81	23.8	89	11.0
INDIANAPOLIS $2 MM	94	56	24.5	149	1.9	108	29.3	114	13.2
JACKSONVILLE $2 MM	171	295	70.3	233	1.6	64	9.5	136	8.6
KANSAS CITY $2 MM	59	20	14.1	17	0.3	81	35.0	72	13.4
LITTLE ROCK $2 MM	81	43	21.6	95	1.4	74	23.2	49	6.5
LOS ANGELES $2 MM	36	8	8.6	13	0.4	80	56.8	82	24.7
LOUISVILLE $2 MM	138	43	12.6	233	2.0	175	32.4	107	8.4
MEMPHIS $2 MM	109	58	21.5	94	1.0	110	25.6	76	7.5
MIAMI $2 MM	92	139	61.4	154	2.0	55	15.3	90	10.5
MILWAUKEE $2 MM	51	8	6.2	4	0.1	71	35.6	148	31.6
MINNEAPOLIS $2 MM	35	16	18.8	10	0.3	49	35.4	86	26.2
NASHVILLE $2 MM	138	77	22.7	189	1.6	118	21.8	99	7.8
NEW ORLEANS/MOBILE $2 MM	84	120	58.5	81	1.1	44	13.3	57	7.4

Philadelphia Market - Snacks Continue To Grow In C-Store Channel

- Dollar Growth for All Categories is 10.6%
- Caramel Corn only declining segment -15.1%
- Perceived Healthier categories (Meat, Nuts, Health Bars, Popped Popcorn) are up 14-28%



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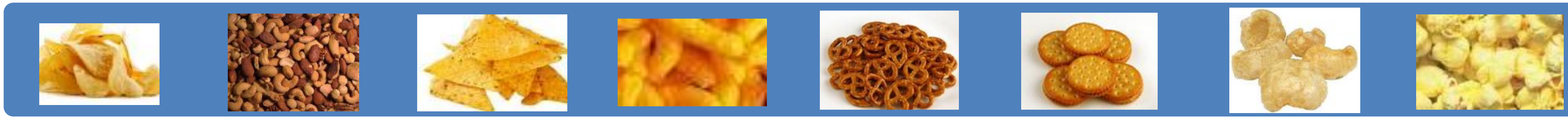
Source: Nielsen Scantrack Conv. Philadelphia Mkt 52 weeks ending 12/22/12

Top 3 Brands Are Critical For Segment Success

Philadelphia



Potato Chips $55.9 MM	Nuts (Bagged) $12.9 MM	Tortilla Chips $22.2 MM	Cheese Puffs $7 MM	Pretzels $14.3 MM	Sandwich Crackers $12.9 MM	Pork Skins $647 K	Popped Popcorn $5.5 MM
Herr's #1 (+4.0%)	David #1 (+14.7%)	Doritos #1 (+11.6%)	Cheetos #1 (+4.3%)	SOH #1 (-1.5%)	PL #1 (+8.6%)	Herr's #1 (+6.8%)	Smart Food #1 (+8.5%)
Lays #2 (+9.0%)	PL #2 (-11.5%)	Tostitos Scoops #2 (+10.9%)	Herr's #2 (+8.0%)	Combos #2 (+19.2%)	Herr's #2 (-4.3%)	Utz #2 (+1.0%)	Herr's #2 (+50.7%)
Ruffles #3 (-1.6%) Cape Cod #24 (-11.8%)	Planters #3 (+26.6%) *Lance #13 (-28.7%)	Tostitos #3 (-1.7%)	Wise #3 (-2.0%)	Herr's #3 (+5.4%) SOH Dips #7 (+69.1%) Pretzel Crisps #9 (NEW)	Keebler #3 (+94.3%) Lance #4 (-8.1)	Baken-ets #3 (+4.9%)	Popcorn Indiana #3 (+91.0%) Lance #10 (+10.1)

Source: Nielsen Philadelphia Mkt C Store Brand Rank 52 w/e 12/22/12

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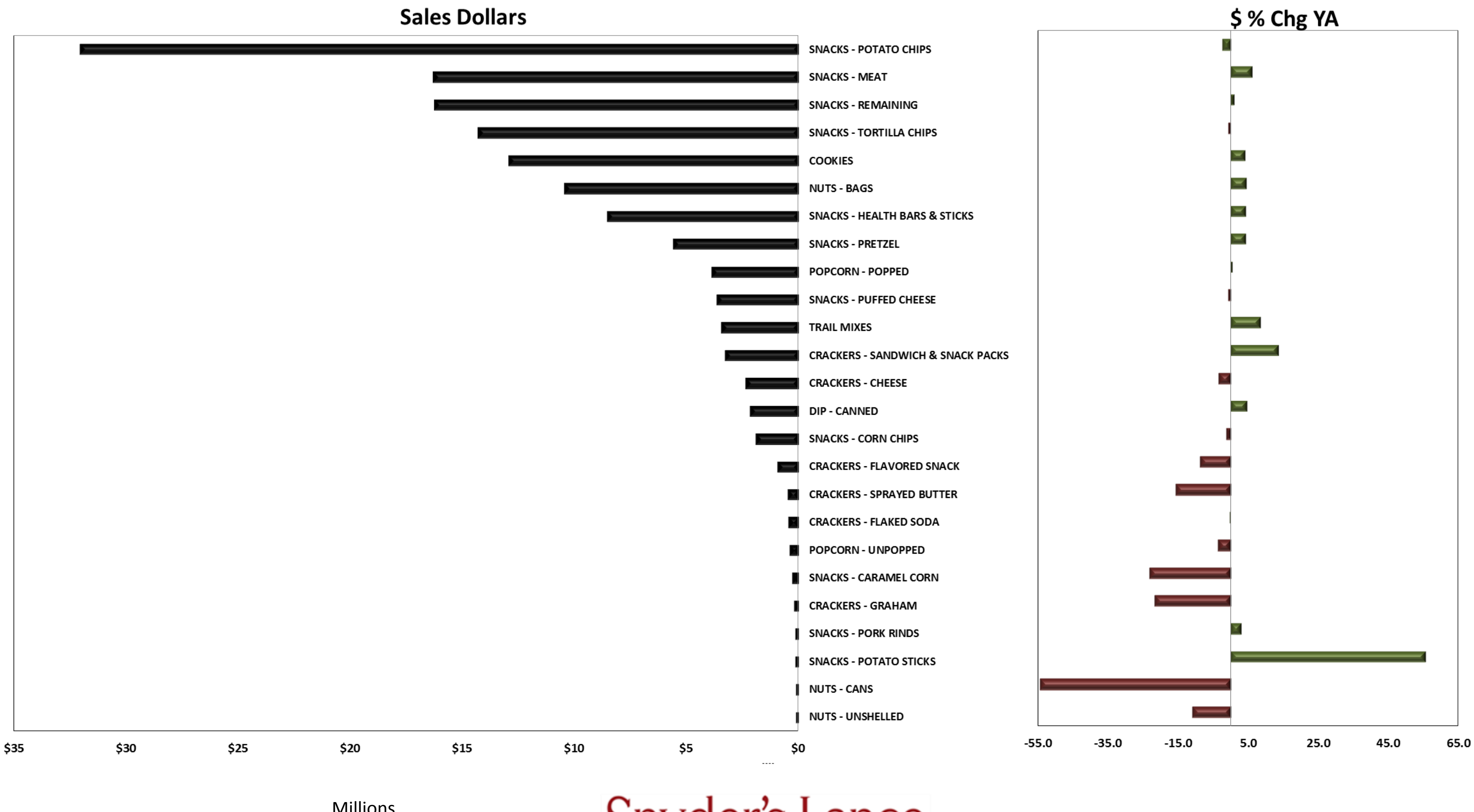
Boston Market - Snacks Continue To Grow In C-Stores

- Dollar Growth for All Categories is 1.4%, 10 pts less than Tot. U.S. growth
- Potato Chips, Tortillas, and Puffed Cheese are larger categories not growing



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Source: Nielsen Scantrack Conv. Boston Mkt 52 weeks ending 12/22/12

Top 3 Brands Are Critical For Segment Succe

Boston

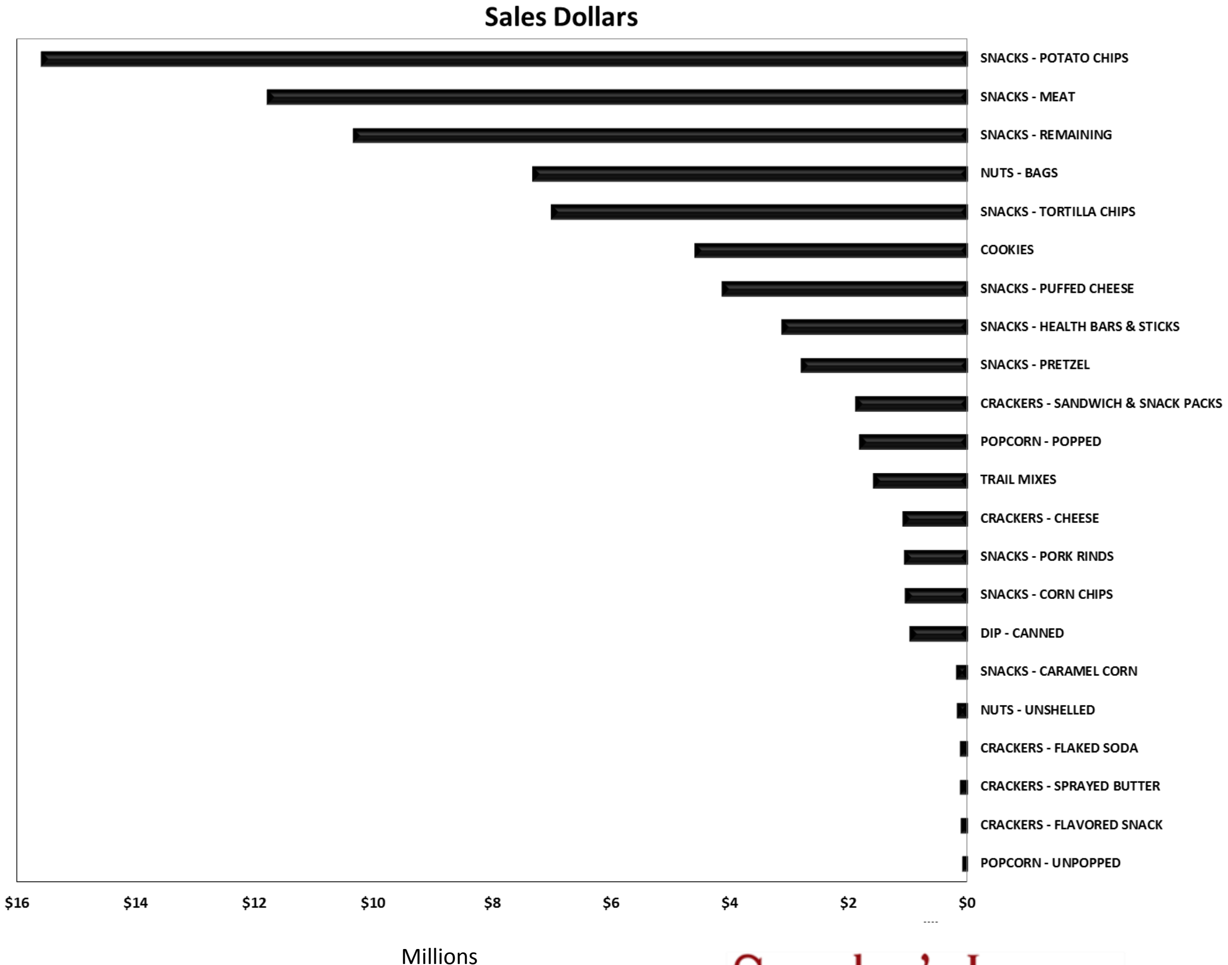
							
Potato Chips $32.0 MM	Nuts (Bagged) $10.5 MM	Tortilla Chips $14.3 MM	Cheese Puffs $3.7 MM	Pretzels $5.6MM	Sandwich Crackers $3.3 MM	Pork Skins $169 K	Popped Popcorn $3.9 MM
Lays #1 (-4.4%)	Planters #1 (-1.7%)	Doritos #1 (-2.4%)	Cheetos #1 (-2.3%)	Combos #1 (+18.8%)	Keebler #1 (+12.8%)	Baken-ets #1 (+3.2%)	Smart Food #1 (-1.0%)
PL #2 (+4.8%)	David #2 (-5.8%)	Tostitos Scoops #2 (-1.5%)	Wise #2 (+5.9%)	Rold Gold #2 (-5.3%)	Lance #2 (+20.1%)	Turkey Creek #2 (+104.4%)	Herr's #2 (+10.4%)
Ruffles #3 (-14.9%) *Cape Cod #5 (+6.2%)	Frito #3 (-16.1%) *Lance #15 (+8.5%)	Tostitos #3 (-8.6%)	PL #3 (+67.3%)	SOH #3 (-10.3%) SOH Dips #5 (-0.6) Pretzel Crisps #8 (NEW)	Ritz Bits #3 (+13.5%)	Toms #3 (-25.4%)	Wise #3 (+7.2%) OkeDoke #11 (NEW)

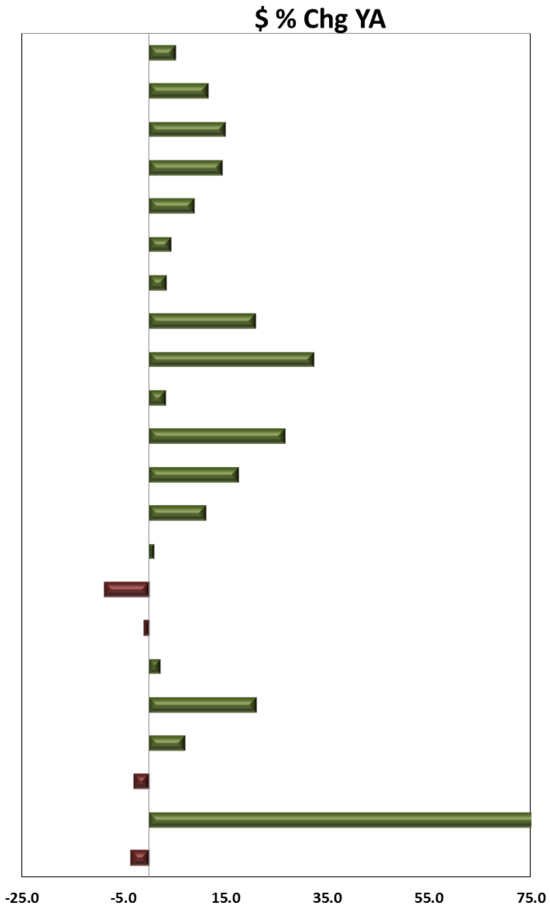
All Frito-Lay Top Selling Brands Appear To Be Struggling

Source: Nielsen Boston Mkt C Store Brand Rank 52 w/e 12/22/12

Orlando Market - Snacks Continue To Grow In C-Stores

- **Dollar Growth for All Categories is 10.4%, slightly lower than Tot. US. growth**
- **Corn Chips, Dips, Sprayed Butter Crackers and Unpopped Popcorn are declining**
- **Perceived Healthier categories (Meat, Nuts, Health Bars, Popcorn, Pretzels) are up 12-32%**





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Source: Nielsen Scantrack Conv. Orlando Mkt 52 weeks ending 12/22/12

Top 3 Brands Are Critical For Segment Succe

Orlando

							
Potato Chips $15.6 MM	Nuts (Bagged) $7.3 MM	Tortilla Chips $7.0 MM	Cheese Puffs $4.1 MM	Pretzels $2.8MM	Sandwich Crackers $1.9 MM	Pork Skins $1.0 MM	Popped Popcorn $1.8 MM
Lays #1 (+11.0%)	Frito #1 (-16.8%)	Doritos #1 (+3.4%)	Cheetos #1 (+3.6%)	Combos #1 (+50.3%)	Lance #1 (-1.9%)	Baken-ets #1 (+3.2%)	Smart Food #1 (+12.3%)
Ruffles #2 (-1.0%)	Frito Munchies #2 (+268%)	Tostitos Scoops #2 (-6.4%)	Toms #2 (NEW)	Rold Gold #2 (-7.3%)	PL #2 (-41.7%)	Toms #2 (+21.6%)	Lance #2 (+166.1%)
PL #3 (+2.3%) Cape Cod #6 (+29.8%) Toms #7 (+11.1%)	Planters #3 (-4.8%) *Lance #6 (+74.8%)	Doritos Jacked #3 (NEW)	Toms Cheezers #3 (-75.1%)	SOH #3 (+17.7%) Pretzel Crisps #6 (NEW) SOH Dips #7 (-22.5%)	Frito Munchies #3 (+49.7%)	Turkey Creek #3 (+15.1%)	Chesters #3 (+1214%) OkeDoke #7 (-0.4%)

Source: Nielsen Orlando Mkt C Store Brand Rank 52 w/e 12/22/12

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