

Gluten-Free Insights

Celiac disease is one of the most common chronic health disorders in western countries. It is also one of the most under-diagnosed. Up until ten years ago, medical schools thought that celiac disease was relatively rare and only affected about 1-in-2500 people. It was also thought to be a disease that primarily affected children and young people. Recent studies and advances in diagnosis show that at least 3 million Americans, or about 1 in 133 people have celiac disease, but only 1-in-4700 is ever diagnosed. Furthermore, celiac disease occurs more prevalently in populations that are genetically predisposed, and incidence rises to 1-in-22 among those closely related to someone with celiac disease.

The National Institutes of Health shows the prevalence of celiac disease to other well-known conditions as follows:

- **Celiac Disease affects 3 million Americans**
- **Epilepsy affects 2.8 million Americans**
- **Crohns Disease affects 500,000 Americans**
- **Ulcerative colitis affects 500,000 Americans**
- **Multiple sclerosis affects 333,000 Americans**
- **Cystic Fibrosis affects 30,000 Americans**

People with celiac disease and others who rely upon gluten-free foods to maintain good health got some good news recently, when the Codex Alimentarius Commission, the international body responsible for establishing food safety standards, adopted a single, clear standard for foods labeled as gluten-free.

In July 2008, the Codex Alimentarius Commission met again and officially adopted the 2007 official Codex standard. Although this new development has yet to appear on their website, here is the new standard:

1. Gluten-free foods

Gluten-free foods are dietary foods consisting of or made only from one or more ingredients which do not contain wheat (i.e., all *Triticum* species, such as durum wheat, spelt, and kamut), rye, barley, oats or their cross-bred varieties, and the gluten level does not exceed 20 mg/kg in total, based on the food as sold or distributed to the consumer.

2. Foods specially processed to reduce gluten content to a level above 20 up to 100 mg/kg

These foods consist of one or more ingredients from wheat (i.e., all *Triticum* species, such as durum wheat, spelt, and kamut), rye, barley, oats or their cross-bred varieties, which have been specially processed to reduce the gluten content to a level above 20 up to 100 mg/kg in total, based on the food as sold or distributed to the consumer.

A Lifetime Commitment

The best treatment for celiac disease is to adhere to a strict gluten-free diet, which is a lifetime commitment. For most people, following a gluten-free diet will stop symptoms, heal existing intestinal damage and prevent further damage. Removing gluten-containing foods from the diet generally relieves symptoms within days, and within months damage to the small intestine heals, allowing villi to function properly.

Despite dietary restrictions, people with celiac disease can eat a well-balanced diet with a variety of foods. Following a gluten-free diet does require a different approach to eating, but there are a growing number of food options available. Many foods are inherently gluten free such as meat, fish, rice, fruit and vegetables. In recent years, gluten-free breads, pastas, cereals and other products have become more readily available, and the quality and variety of gluten-free foods has significantly improved.



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Seal of Approval: Setting the Standard

The Gluten-Free Certification Organization (GFCO) is a program of The Gluten Intolerance Group®, also known as GIG®, and is a 501(c3) non-profit organization. GFCO's Scientific and Professional Board review the practices of GFCO. GFCO inspects products for gluten. The GFCO products with the following seal have reached the quality standard established by the GFCO and consistent with the Codex standard.



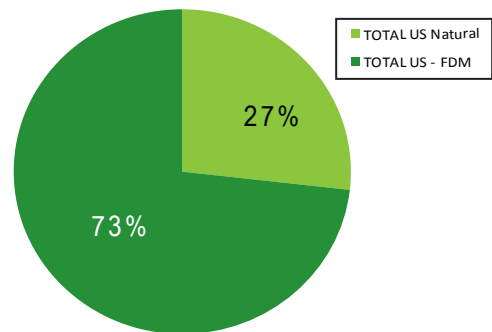
Gluten-Free Adding to Channel Growth

Gluten-Free products are at \$861.4 mm in Natural and FDMx channels and growing at 18%.

73% of the dollars are coming from Conventional FDM, growing at 16.6%.

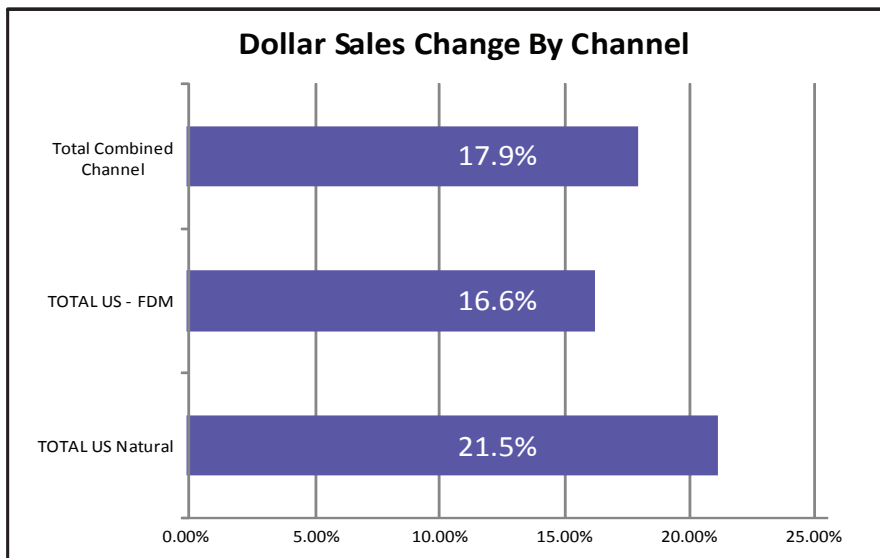
27% of the dollars are coming from the Natural Channel, growing at 21.5%

**SPINSscan Natural and SPINSscan Conventional
Total US Gluten-Free 52
wks period ending 08/09/08**



*Data Source: SPINSscan Natural and SPINSscan Conventional (powered by Nielsen Scantrack) Gluten Free Sales 52 weeks ending 08/09/08

Dollar Sales Change By Channel



*Data Source: SPINSscan Natural and SPINSscan Conventional (powered by Nielsen Scantrack) Total US Gluten Free Sales 52 weeks ending 08/09/08 vs. 52 weeks ending 08.11.07