



Gluten-Free Product Sales



*Information and Services to Grow the
Natural Products Industry*



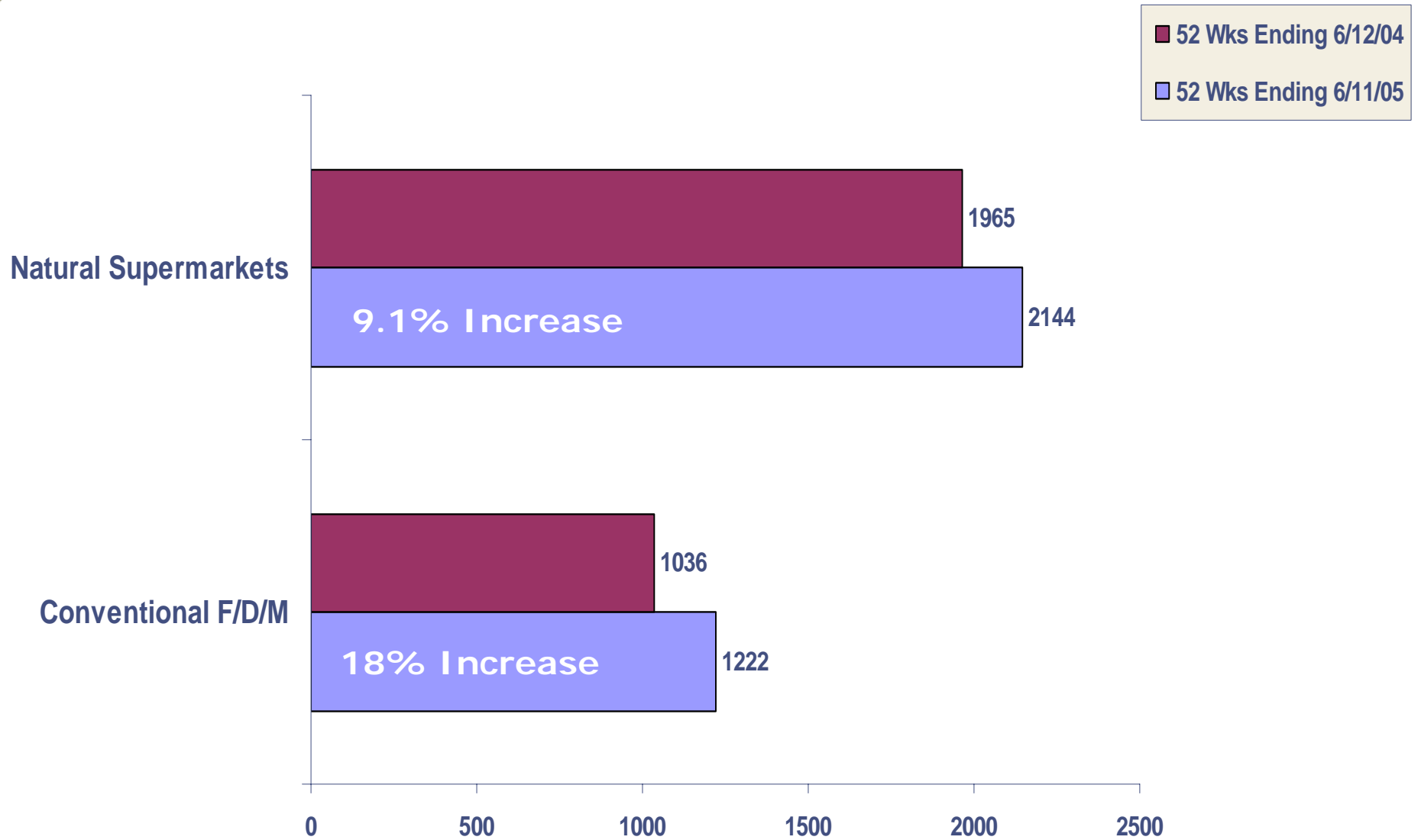
SPINS' Methodology

SPINS has researched more than 10,000 products for gluten-free positioning and label claims to date. Research is done by identifying the claims on packaging found on manufacturer products. SPINS searches for the products on manufacturer websites and also calls manufacturers to determine this information. The general responses fall into three segments.

The product is gluten-free...

- 1) and labeled as such
- 2) and not labeled because the manufacturer is waiting for current labels to run out. New labels will indicate that the product is gluten-free.
- 3) and not labeled because the manufacturer can't guarantee that the product is free of gluten as it's produced in the same machinery as other gluten-containing products.

Gluten-Free Product Introductions

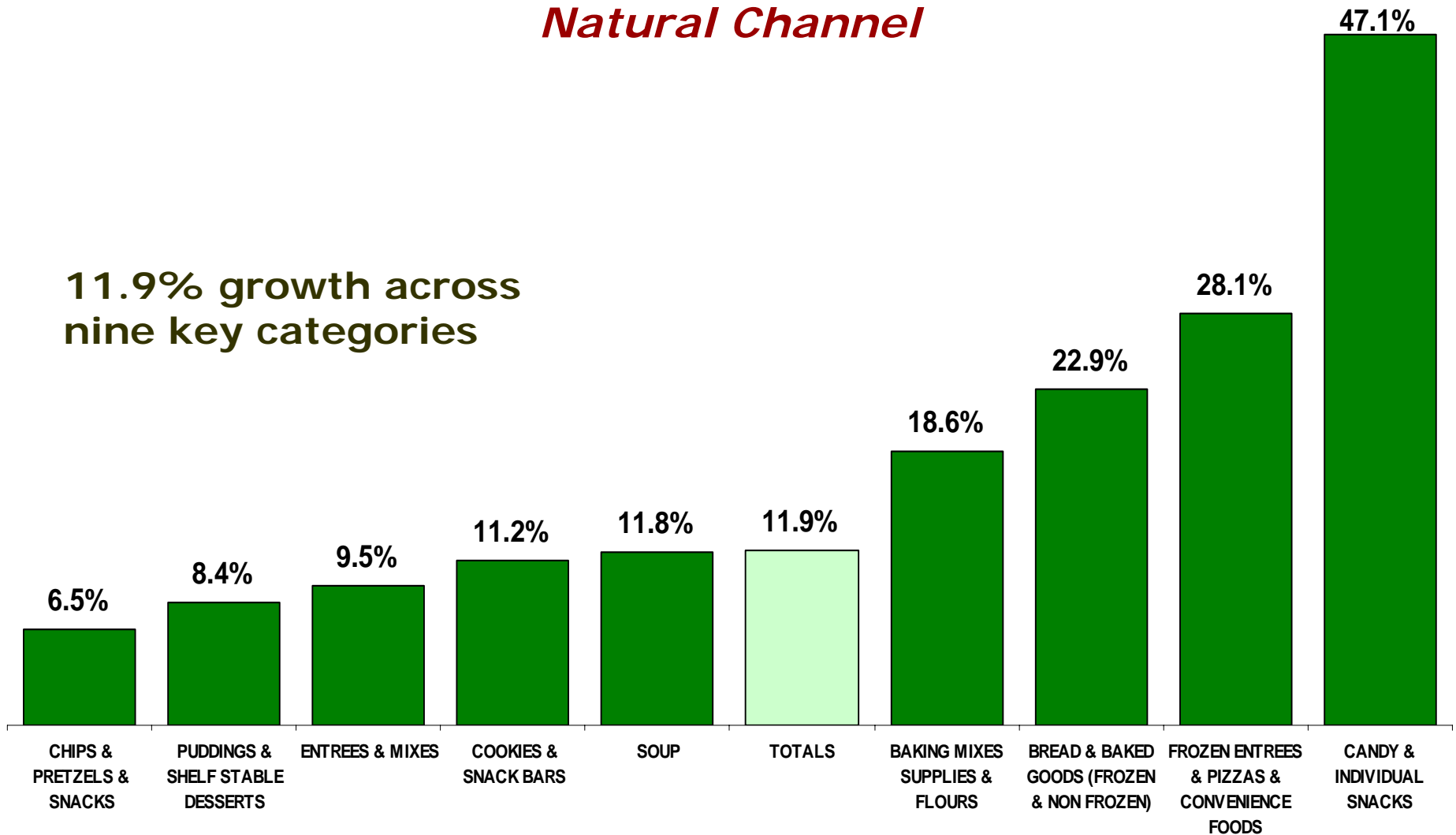


9/14/2005

Percentage Growth In Key Gluten-Free Categories

Natural Channel

11.9% growth across
nine key categories

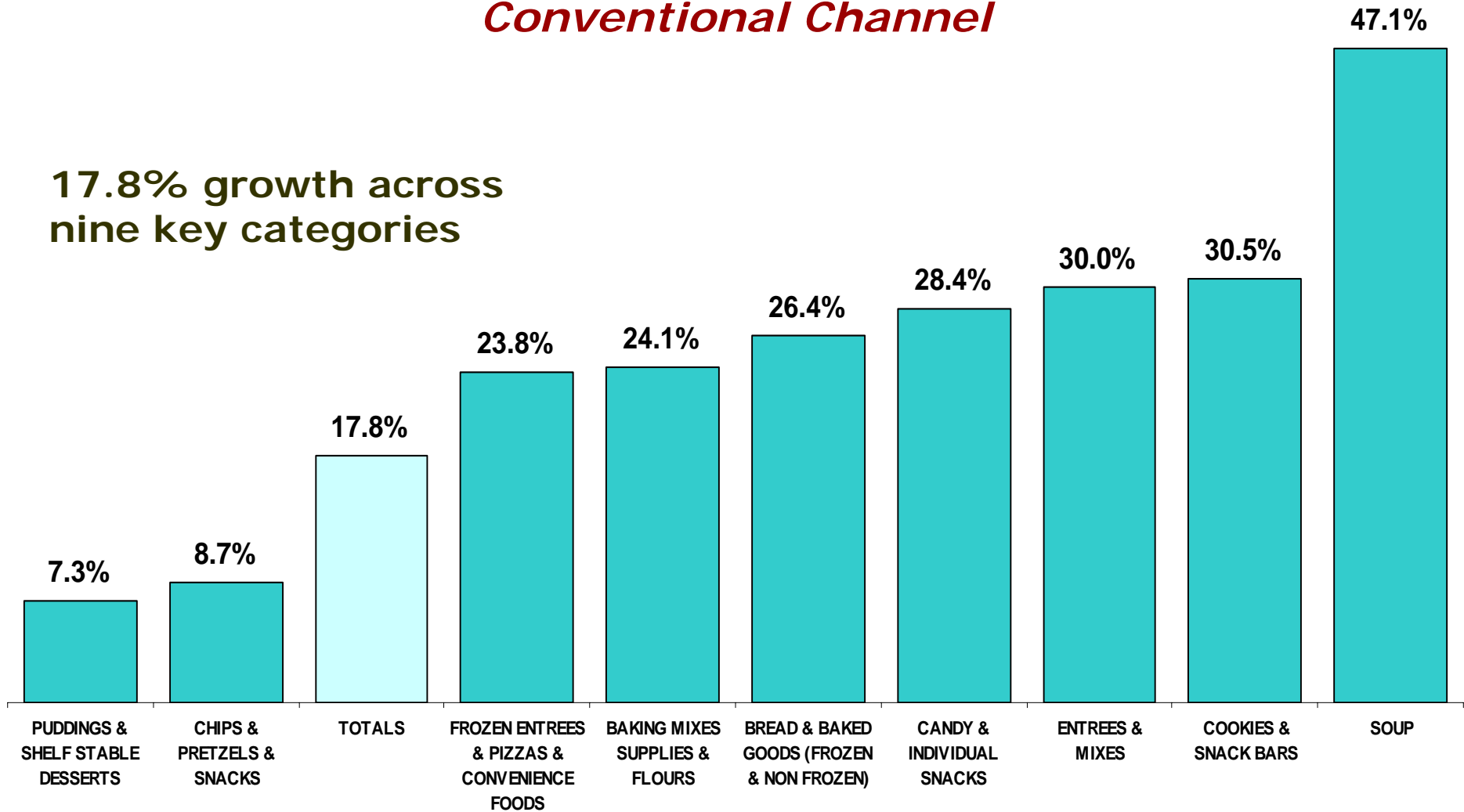


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Percentage Growth In Key Gluten-Free Categories

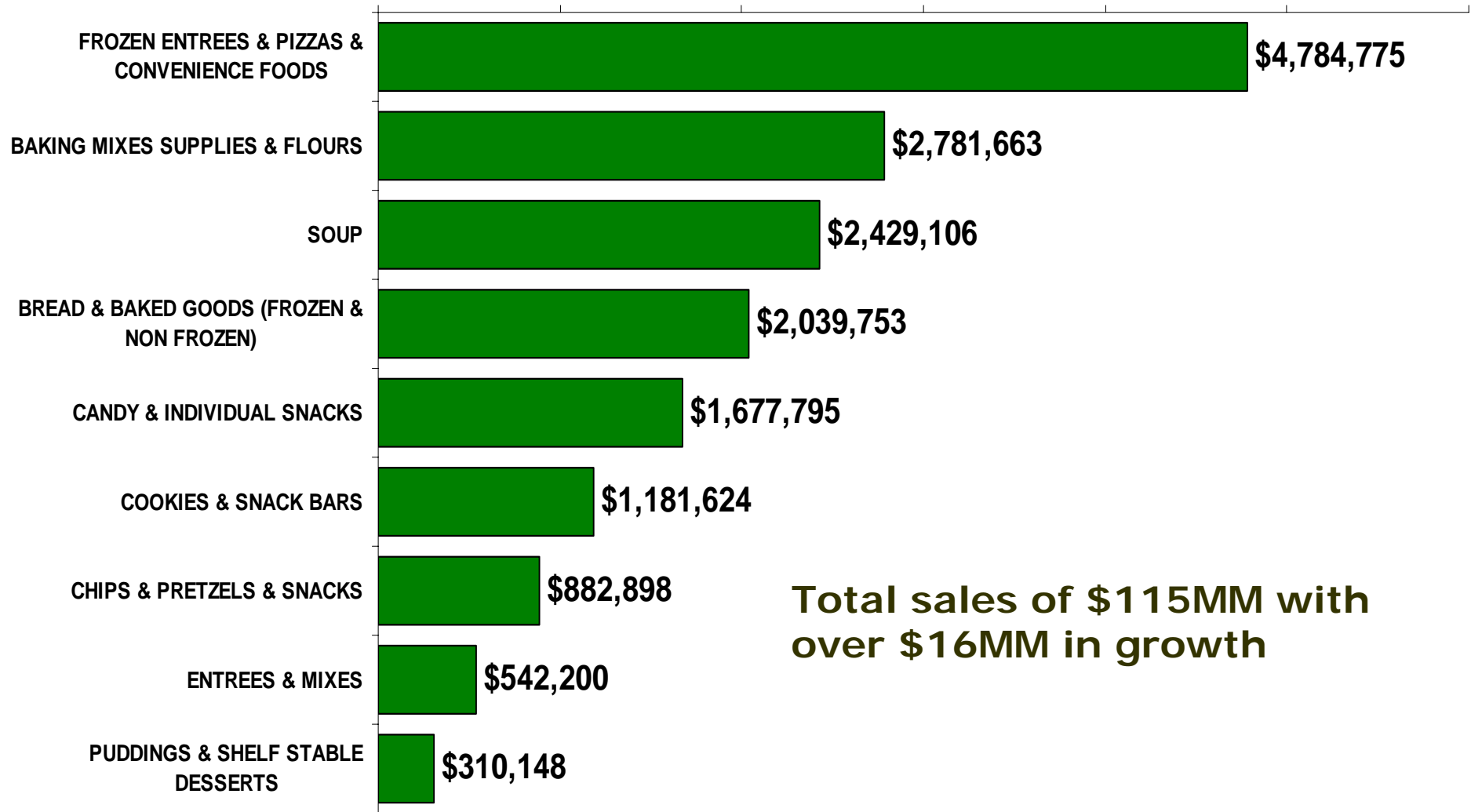
Conventional Channel

17.8% growth across
nine key categories



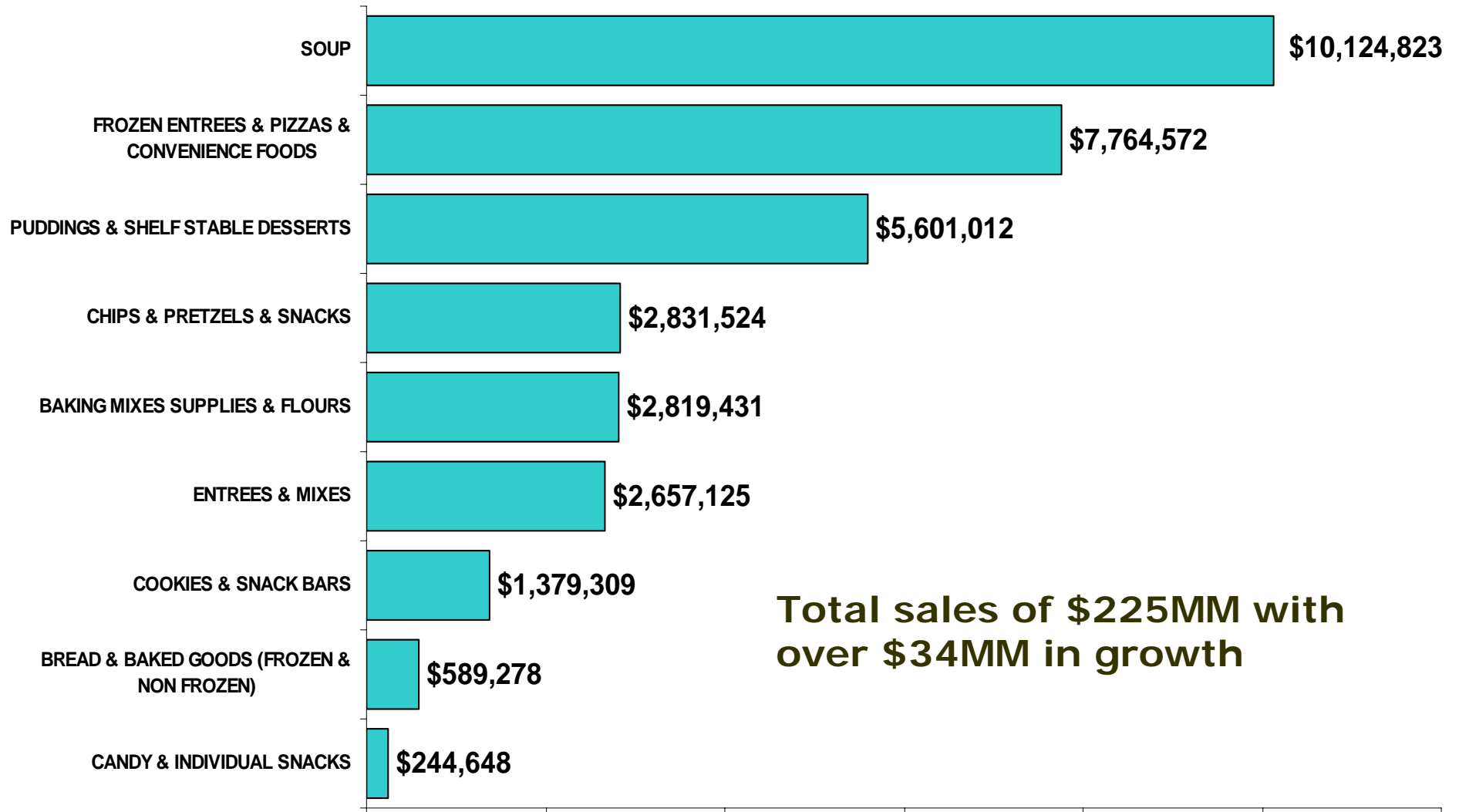
Absolute \$ Growth In Key Gluten-Free Categories

Natural Channel



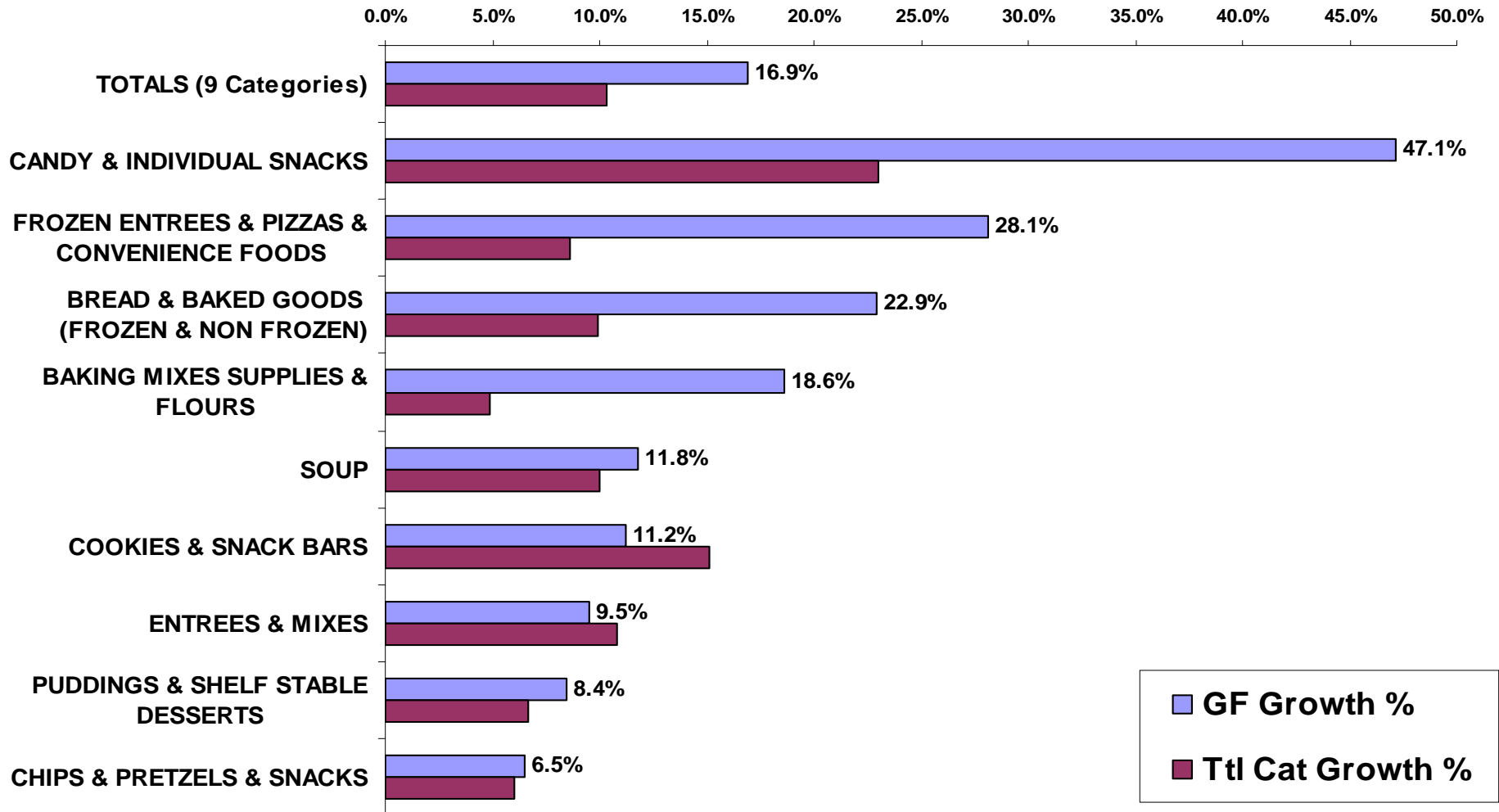
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Absolute \$ Growth In Key Gluten-Free Categories *Conventional Channel*



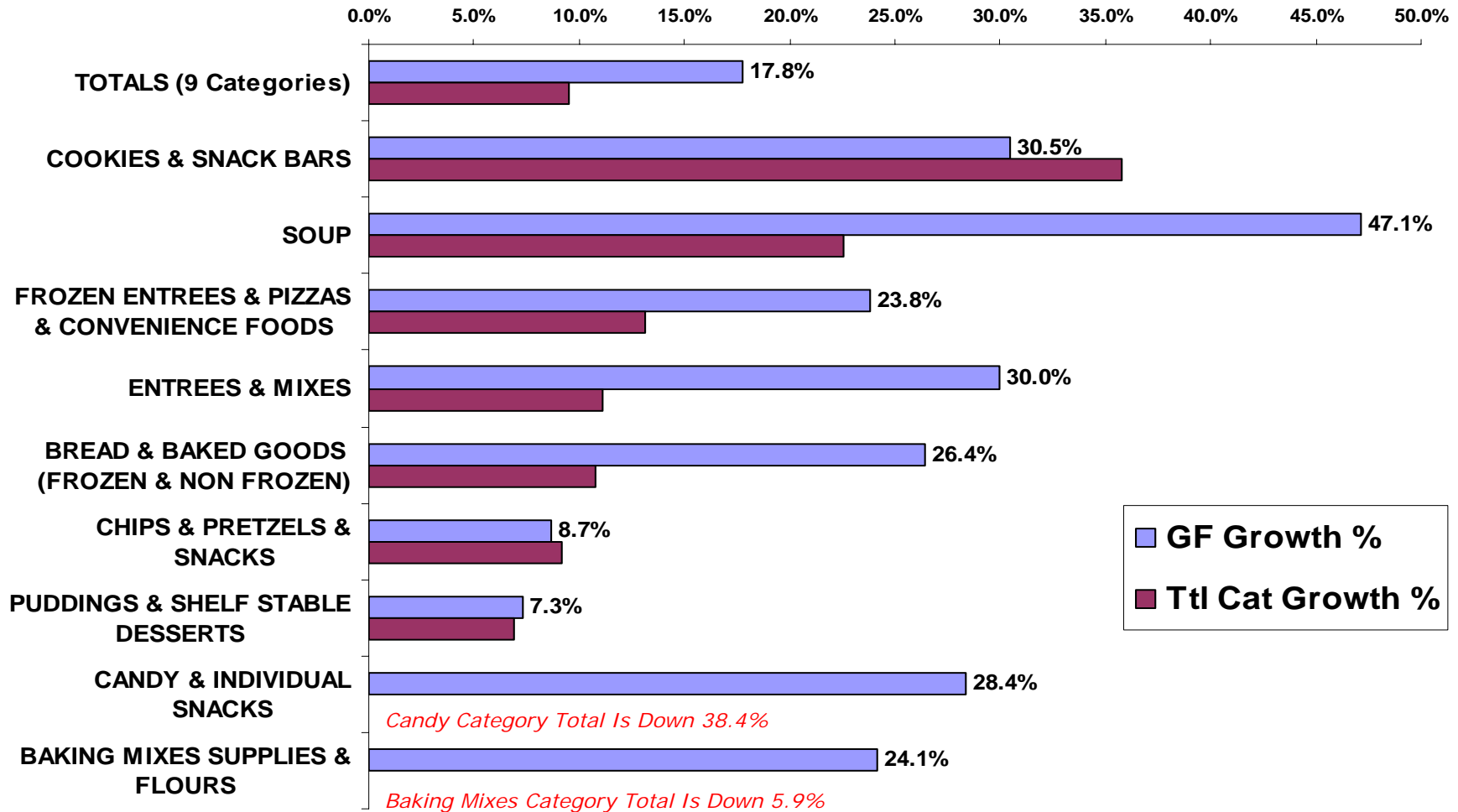
Gluten-Free Growth vs. Total Category Growth

Natural Channel



Gluten-Free Growth vs. Total Category Growth

Conventional Channel





*For more information on SPINS reporting on gluten-free products, contact Diana Dixon at: 815.609.0607, or ddixon@spins.com
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