Growth for Good State of Industry Expo East 2023

Natural Products EXPO EAST®

BIOFACH AMERICA

SPINS® | whipstitch CAPITAL | New Hope NETWORK

By Informa Markets

Vision 2030 Presenters

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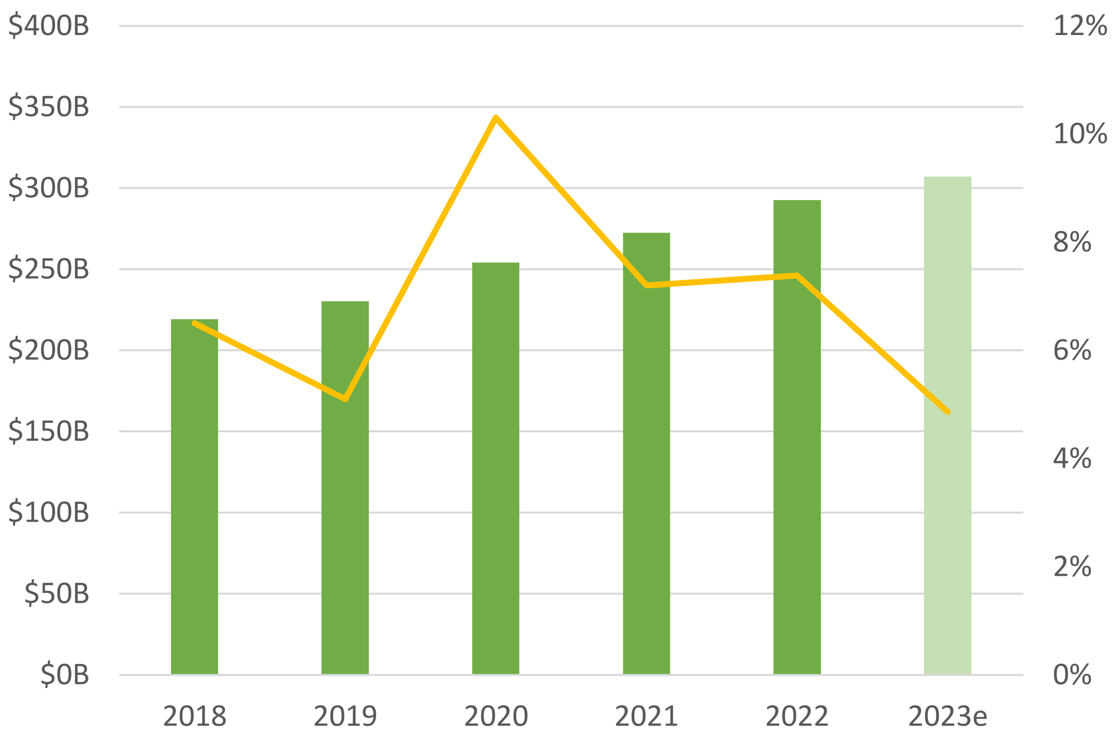
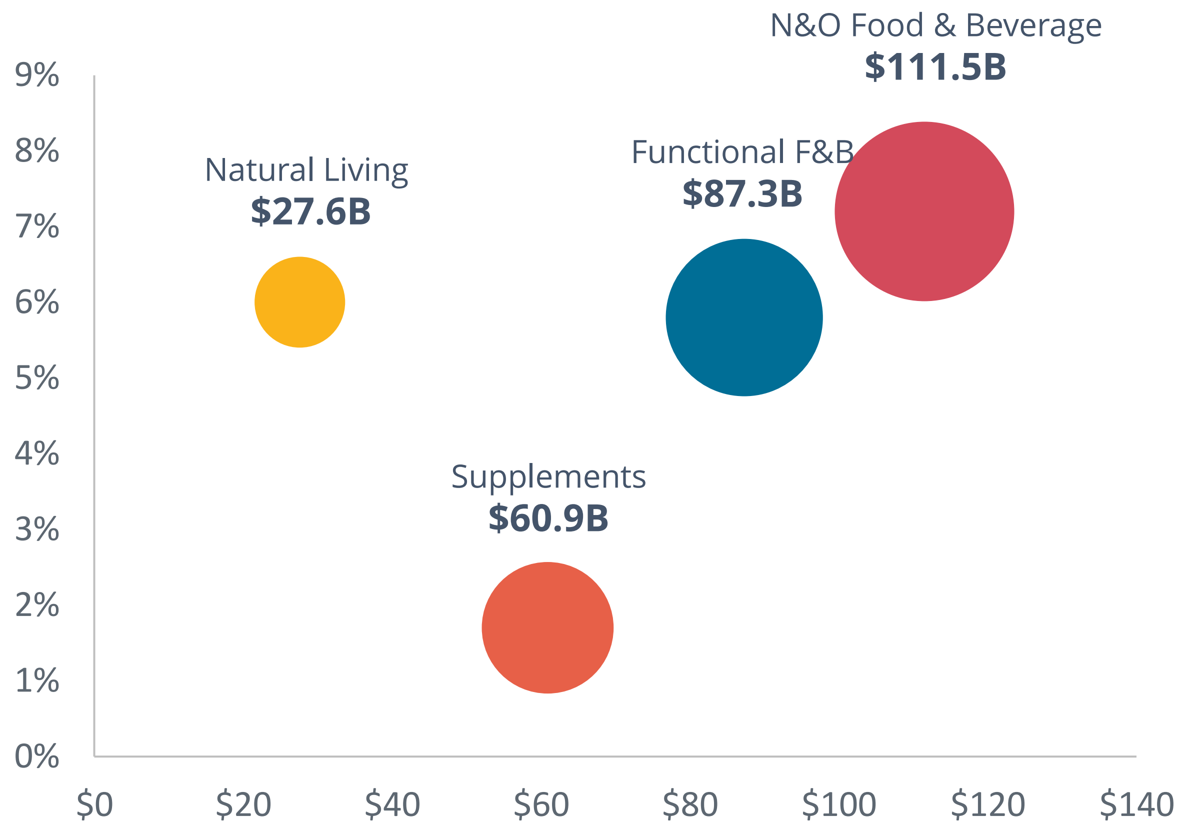
The U.S. natural & organic industry growth continues to prove resilience

U.S. natural & organic products industry sales grew est. **7.4%** to $292B in 2022; sales on track to easily surpass $300B in 2023





Source: Nutrition Business Journal ($mil, consumer sales), powered by SPINS. Recent trends apply SPINS trends to NBJ and SPINS source data
Department totals continue to be 2022 estimates.

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This natural products' resilience continues across all channels of trade

Recent time periods show further accelerating natural & wellness products' growth

	Natural Channel	Regional Grocery Channel	Conventional Multioutlet	Convenience
TOTAL CHANNEL SALES	+2.6%	+3.7%	+6.6%	+8.9%
NATURAL PRODUCTS	+3.4%	+3.9%	+6.2%	+8.6%
SPECIALTY & WELLNESS PRODUCTS	+2.0%	+3.7%	+6.9%	+11.7%

Source: SPINS Total store US Natural Enhanced Channel, Conventional Multioutlet + Convenience Channels (powered by Circana), 52 Weeks ending 8/13/2023

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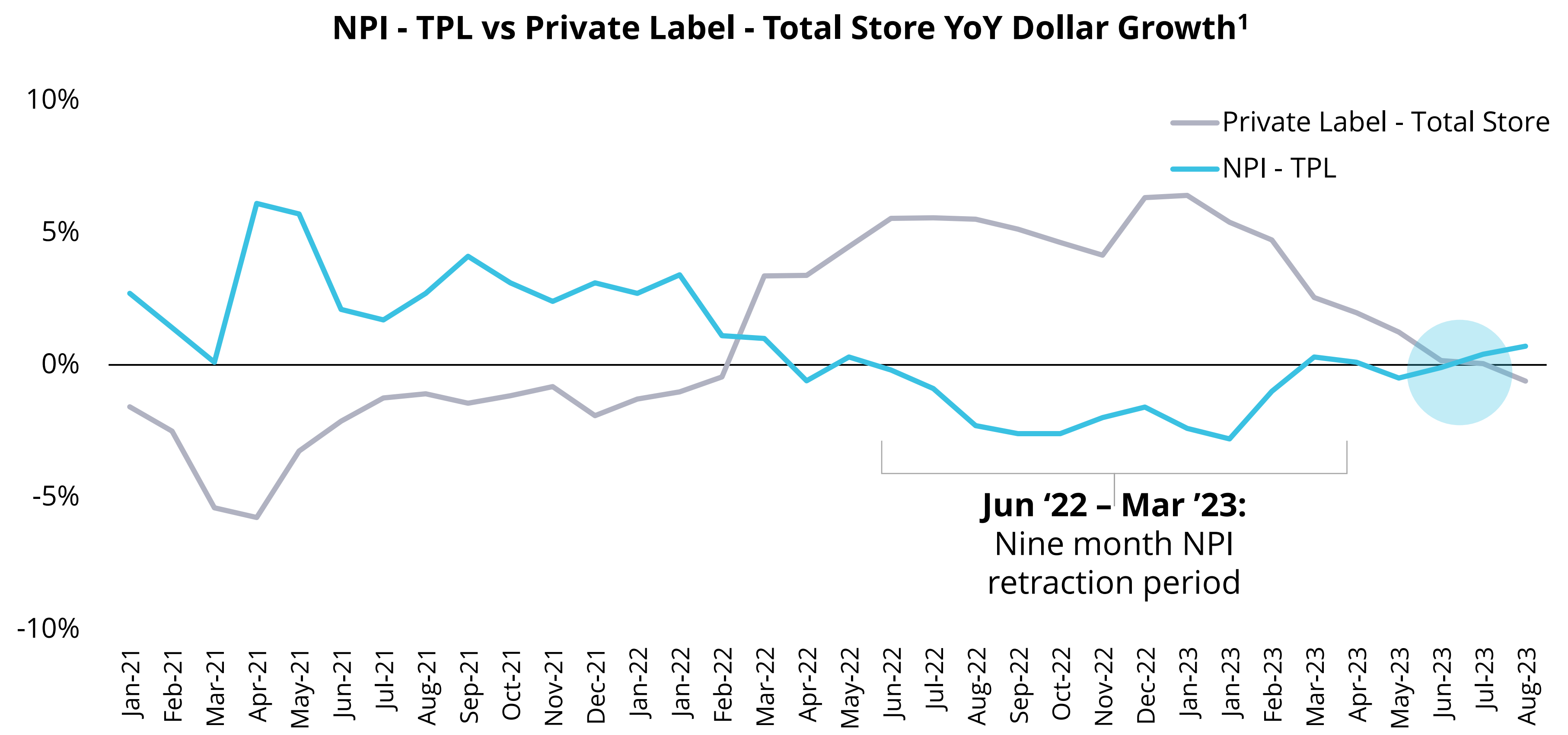
Inverse Relationship Between NPI and Private Label Growth

Widening Gap Between NPI and PL Growth Rates Indicates Return to Normal Post-Downturn in Early 2023

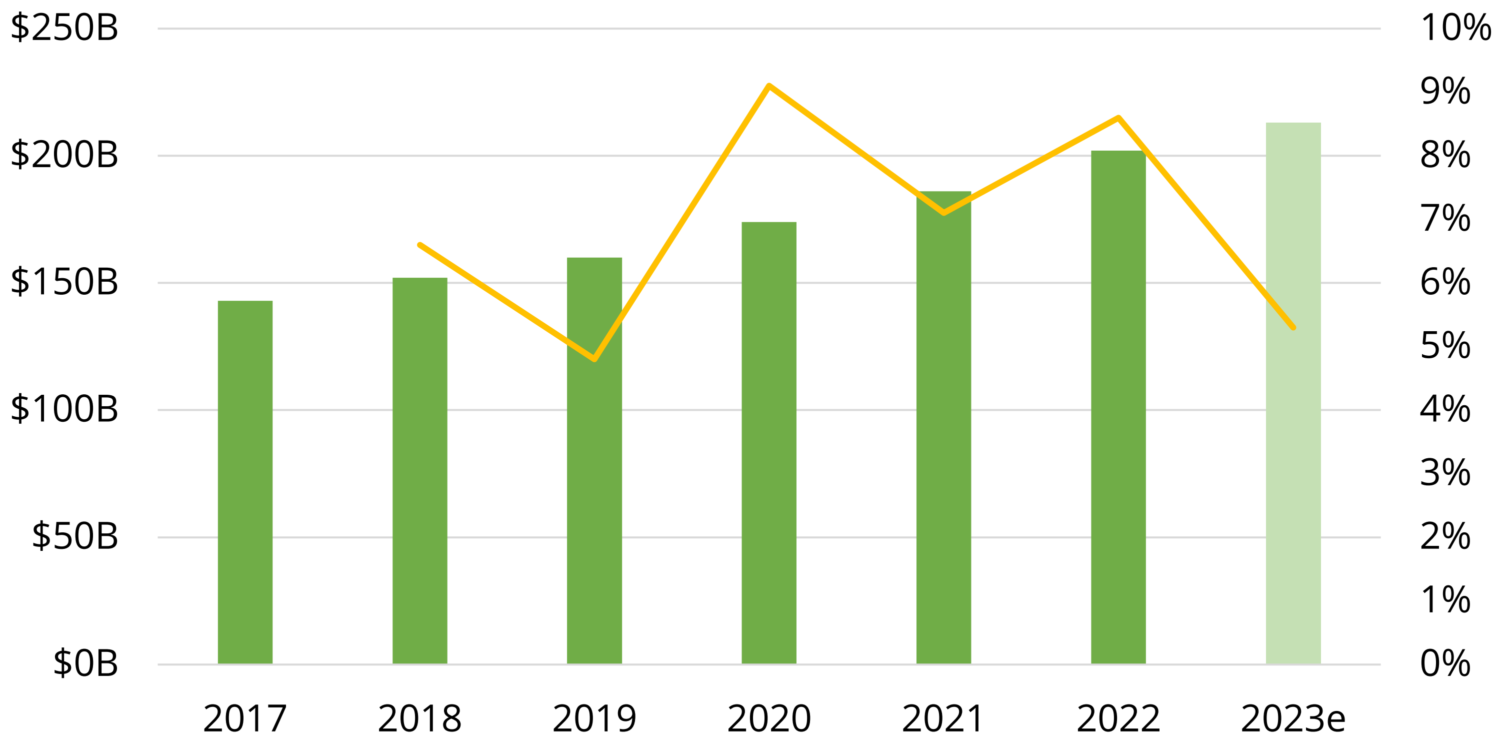


Consumer panel data shows the same recent trend across **all outlets** with NPI +2.5% vs all products at +2.4%.

1. SPINS, MULO + Natural + Convenience, 4 WE 8/13/23; NPI = Natural Products Industry, TPL = Total Products Library
2. SPINS All Outlet Consumer Panel (powered by Circana), 4 weeks ending 9/10/23

Natural, organic and functional food and beverage is slightly outpacing total natural & organic industry sales

U.S. natural, organic and functional food & beverage sales grew est. 8.6% to $202B in 2022 and is currently growing 5.3% YTD



What's standing out in 2023?:

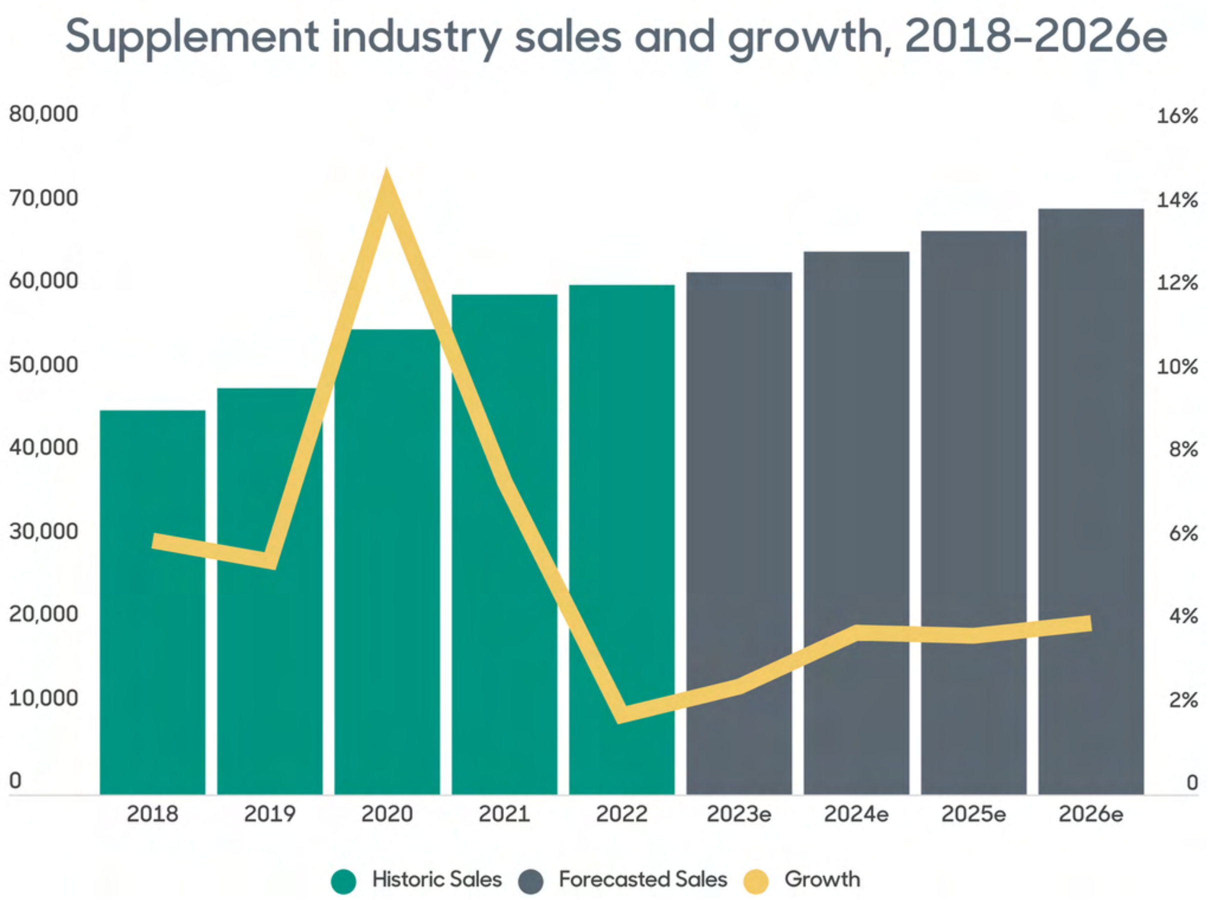
- ✓ **Soda**
- ✓ **Creams & Creamers**
- ✓ **Candy**
- ✓ **Infant Formula**
- ✓ **RF Condiments**

Source: Nutrition Business Journal ($mil, consumer sales), powered by SPINS. Recent trends apply SPINS trends to NBJ and SPINS source data.

Supplement sales continue to grow tempered with growth dips in 2022 and 2023 following previous 2020 boost

U.S. Supplements grew estimated 1.9% to **$61B** in 2022.

2022 is still estimated to be **~$1.5B higher** than previously projected pre-COVID



Source: *Nutrition Business Journal* ($mil, consumer sales)

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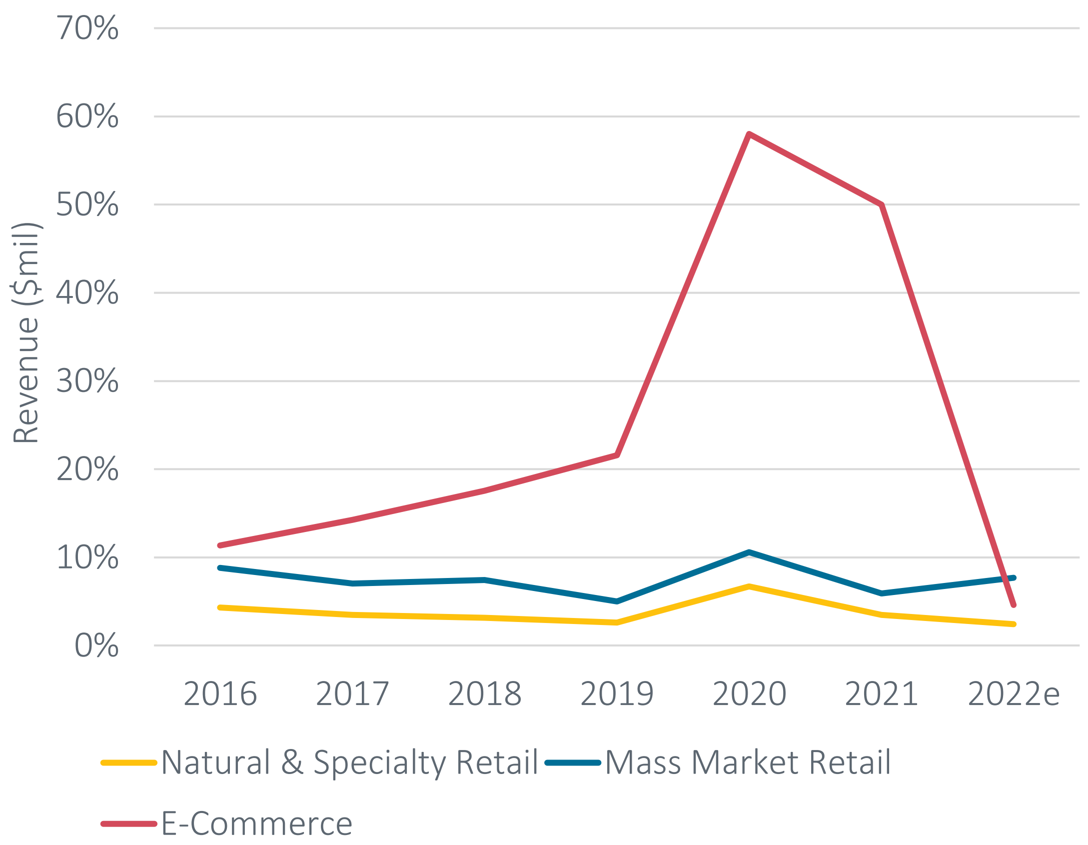
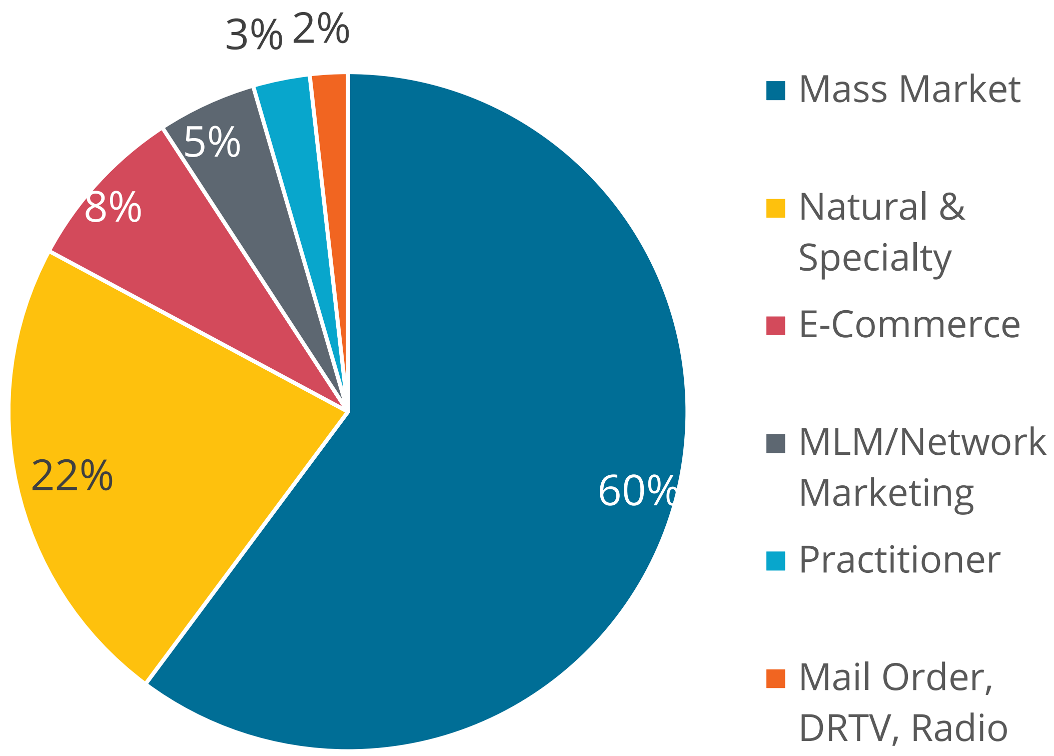
Consumers pull back from buying online while further prioritizing mass channel

eCommerce growth est. at 4.6% in 2022; with mass growing at 7.7% and natural & specialty at 2.4% for total industry





Source: Nutrition Business Journal ($mil, consumer sales), powered by SPINS

Natural products shoppers have different shopping patterns as they tend to frequent outlets stocking products that match their values

Within outlets, NPI holds the highest share of total purchases in health & specialty stores, pet stores, internet, MassX, & US Food.

Share of Wallet across top 4 Outlets

	NATURAL PRODUCTS SHOPPERS		ALL OTHER PRODUCT SHOPPERS	
	12 wks ending 8/13/23	12 weeks Year Ago	12 wks ending 8/13/23	12 weeks Year Ago
US Food	**45%**	**45%**	**37%**	**37%**
Walmart	**14%**	**13%**	**25%**	**24%**
Club	**13%**	**14%**	**11%**	**11%**
Internet	**9%**	**9%**	**5%**	**4%**

*Internet includes range of purchases from pure play Ecommerce to Click & Collect; Brick & Mortar outlet sales do not include internet sales.

Source: SPINS All Outlet Panel (powered by Circana)of to, Enhanced with SPINS Product Attribution.

The Maturity of Our Industry Is Driving the Convergence of Growth and Profit

2000 - 2010	2010 - 2020	2020–2030
Food and beverage companies could exit with as little as $10m revenue and losses	$10m brand exits became $100m and margins are an increased focus	Brands are continuing to be bought closer to their independent headroom potential – if not profitable at that point, cannot get there

Investor and Strategic Observations

1. Investors increasingly underwriting to **EBITDA-based exits** – multiples range from 10x – 20x
2. **Long-held portfolio companies** tend to be **unprofitable** and have **limited brand headroom** to scale to profitability
3. **Increased value** from strategics for **brands that manufacture**
4. **Multiple liquidity points** are becoming **more prevalent** in the lifecycle of **successful brands**

Enablers of Profitability

Increased integration of supply chain

Marketing efficiency through better data

Omnichannel as a toll to increase brand headroom

Greater number of "rising tides" for every brand

To create the world we want in 2030, let's use our industry scale to **Grow for Good**

We increasingly see brands at the intersection of these trends which will further build momentum towards 2030

Today's Reality	As an industry, we can catalyze and create change
Unhealthy dietary patterns **account for 1 in 5 deaths** worldwide	• Let's consider **health span** instead of life span • "**Strong** is the new skinny"
2/3 of the 740M in extreme poverty are agricultural workers and their dependents	• Let's love others • **Everyone deserves access** to healthful food.
The food system **generates ~25% of industry greenhouse gas** emissions	• Potential to **get to zero** through regenerative agriculture and eliminating food waste • Gen Z anxiety is at an **all time high** based on an uncertain future*

Source: UNSFF, "The True Cost and True Price of Food", 2021. United Nations Food systems Summit 2021 Scientific Group, "Food systems – Definitions, Concepts, and Applications for the UN Food system Summit", Dec 20, 2020. Global Nutrition Report, Global Nutrition Report 2020,2020. Food and Land Use Coalition, "Growing Better" 2019.

2023 EY Gen Z Segmentation Study, Release 9/18/23

Polling question: (Word Cloud) As you think about co-creating the future, where would you want to focus?

Growth for Good
Vision 2030

- Eating for Health
- Evolving our Perspective on Plant-based & Protein
- The Rising of Global CPG and Global Experiences
- Turning Planetary Priorities into Action

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Eating for Health

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Beverage as Medicine

Consumers look to support key health areas expecting more from the foods they eat and drink. Expected continued innovation across food & beverage aisles as they pull inspiration from supplement trends.

Top Performing Health Focuses Tracked in Beverage

Health Focus	Sales	%growth YoY
Cleanse & Detox	**$15.6m**	**+37.6%**
Mood Support	**$24.6m**	**+34.0%**
Digestive Health	**$1.1b**	**+17.9%**
Weight Loss	**$750k**	**+15.1%**
Cognitive Health	**$51.8m**	**+13.4%**
Pain & Inflammation	**$4.3m**	**+11.9%**
Hydration	**$457m**	**+11.4%**
Hair Skin & Nails	**$8.6m**	**+10.1%**
Cold & Flu	**$71.3m**	**+7.4%**
Immune Health	**$43.8m**	**+3.0%**

Soda Category

Health Focus	YoY Growth
Digestive Health	**+209.8%**
Performance	**+22.9%**
Mood Support	**+14.5%**

Water Category

Health Focus	YoY Growth
Cold & Flu	**+95.7%**
Sleep	**+83.3%**
Digestive Health	**+49.4%**

Source: SPINS Natural Channel, MULO (powered by Circana), 52 Weeks Ending 8/13/23
Powered by SPINS Product Intelligence: Health Focus

Consumers continue to seek natural relief for Sleep & Stress

While growth rates have slowed from 2020-21 highs, awareness is strong as a need for support as well as natural options for relief.

50 –70 million Americans
have sleep disorders

1 in 3 adults, 84 million,
do not get enough sleep regularly

¾ of Americans
report having experienced health impacts due to stress in the last month

Functional Ingredient	% Growth YoY
Ashwagandha	+11.2%
CBD	-12.5%
Chamomile	2.4%
Lemon Balm	-9.0%
Magnesium	+30.7%
Melatonin	-8.1%
Theanine	-8.7%
Valerian	-5.4%

SPINS Natural Enhanced Channel and MULO, powered by Circana | 52 Weeks Ending 8.13.23
Stress in America, 2022, American Psychological Association, The Harris Poll, SleepHealth.org

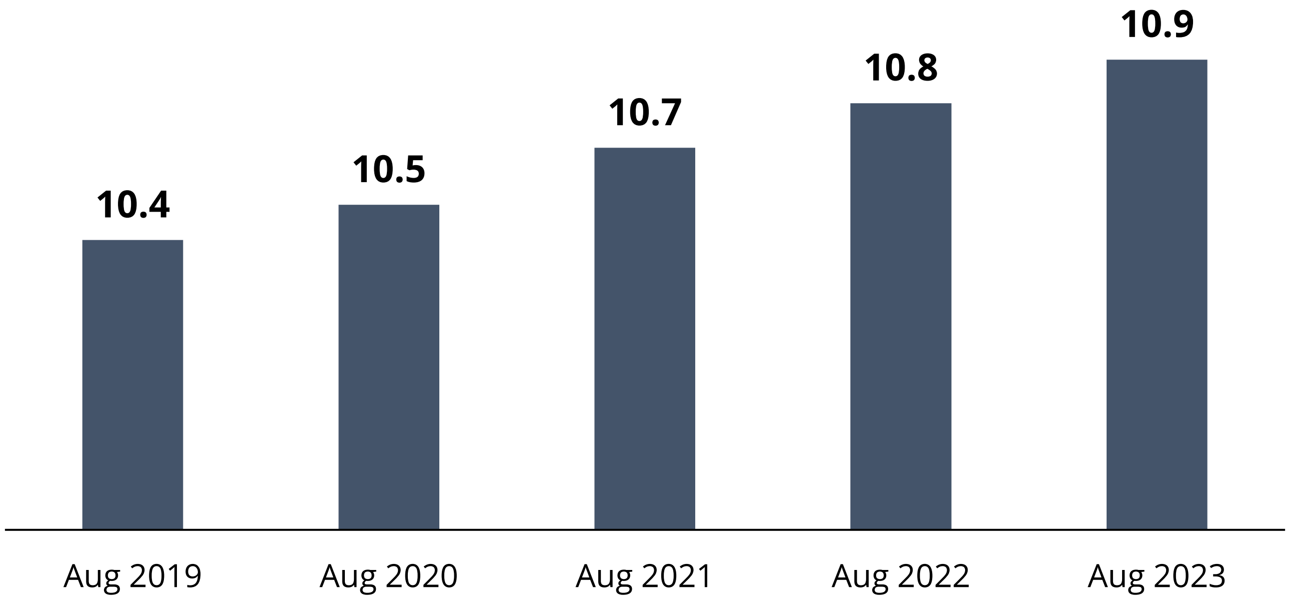
Ingredient Counts are Increasing - Clean Label is a Consumer Priority

Meat Alternatives have More than 2x the Ingredients of the Average Product

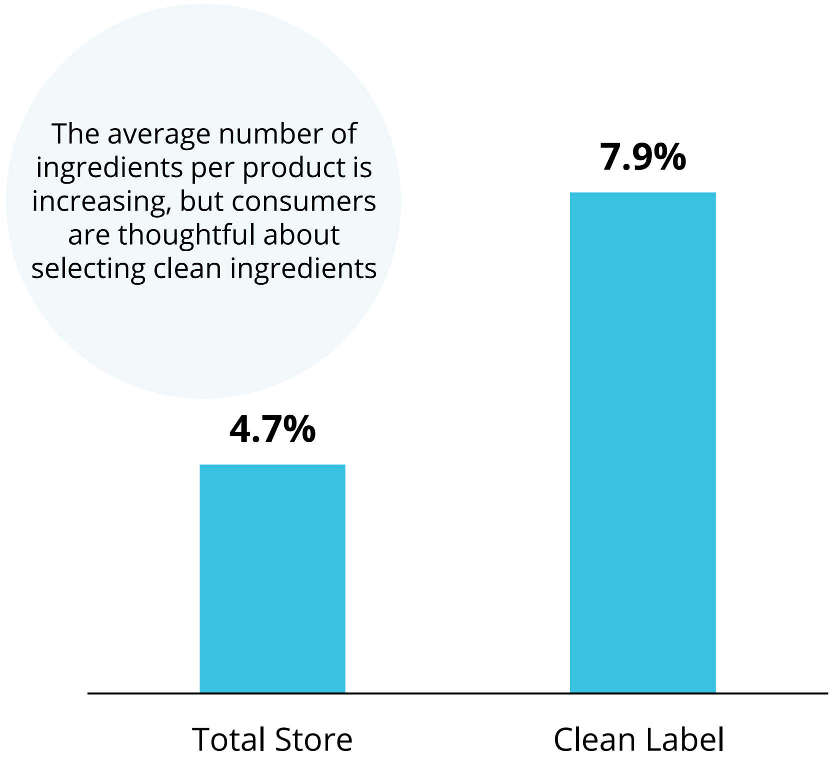
Dollar-Weighted Number of Ingredients – Total Food & Bev, Meat Alternatives[1]

Meat Alternatives

23.6	23.2	23.1	23.6	23.1



Clean Label Products Over-Indexed Total Store Growth[1]



1. NielsenIQ, Total Food & Bev, Total Meat Alt, 52 WE 8/12/23

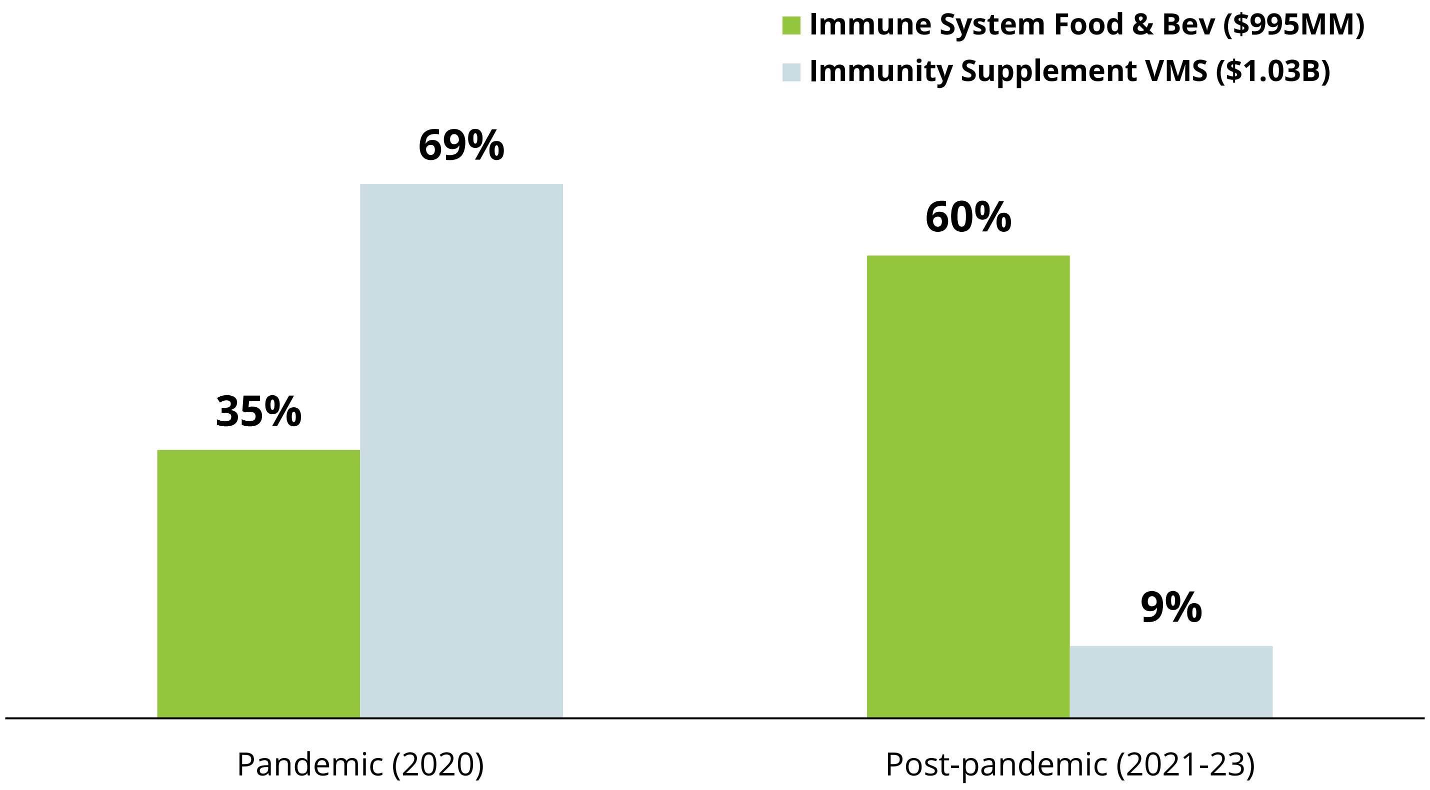
Immunity Conscious Consumers Expect Food to Supplement Health

Consumers Embrace Holistic View of Wellness Turn to Food and Beverage to Support Immunity

Dollar Growth of Immunity VMS vs Immunity Food & Bev[1]

Pandemic:

During the pandemic consumers drove up demand for vitamins and supplements to support their immunity.



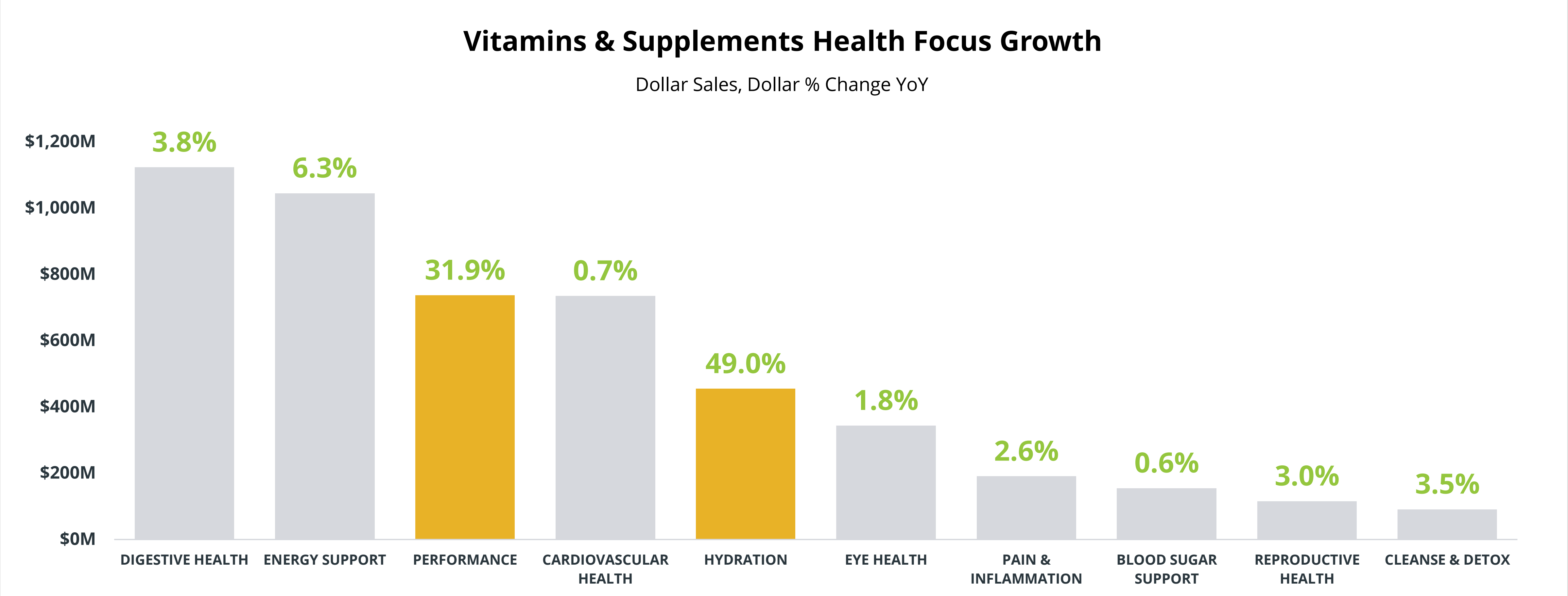
Post-pandemic:

Consumers turn to food and beverages with immunity benefits as consumers embrace a wholistic view of wellness.

1. NielsenIQ, 52 WE 8/12/23

Shoppers are looking to support their health needs and interests

Shoppers are purchasing supplements in areas of health support, with **Performance and Hydration** products **growing double-digits** in sales dollars in Vitamins & Supplements.



** % Represents % Change YoY (vs same time LY)*

Source: SPINS Natural Channel, Conventional (Powered by Circana)
All Categories
52 Weeks Ending 8/13/23

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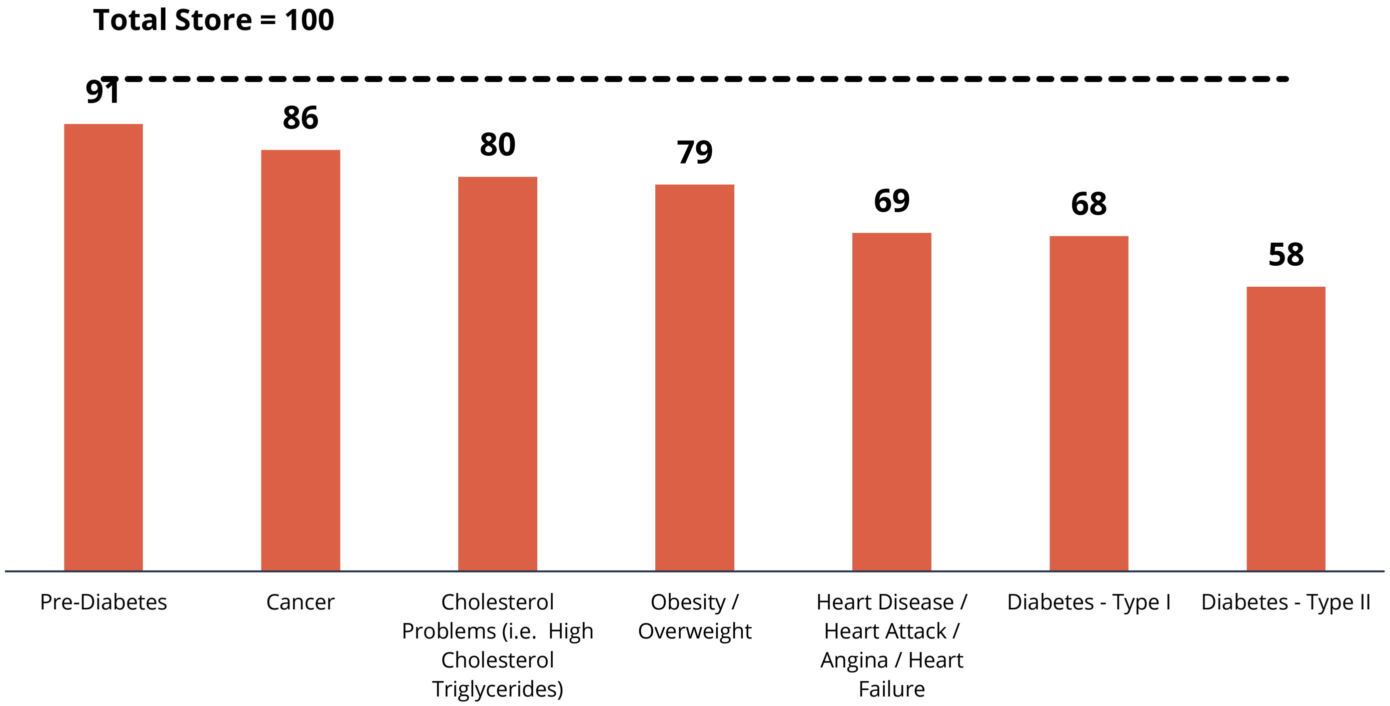
People with Life Threatening Ailments Eat Less Organic and Vice Versa

Organic Food Dollar Index vs. Total Store[1]

People with Life Threating Ailments Underindex in Organic Sales



& Those with Diet-related Ailments Overindex

125

Food Allergies[2]

116

Celiac Disease

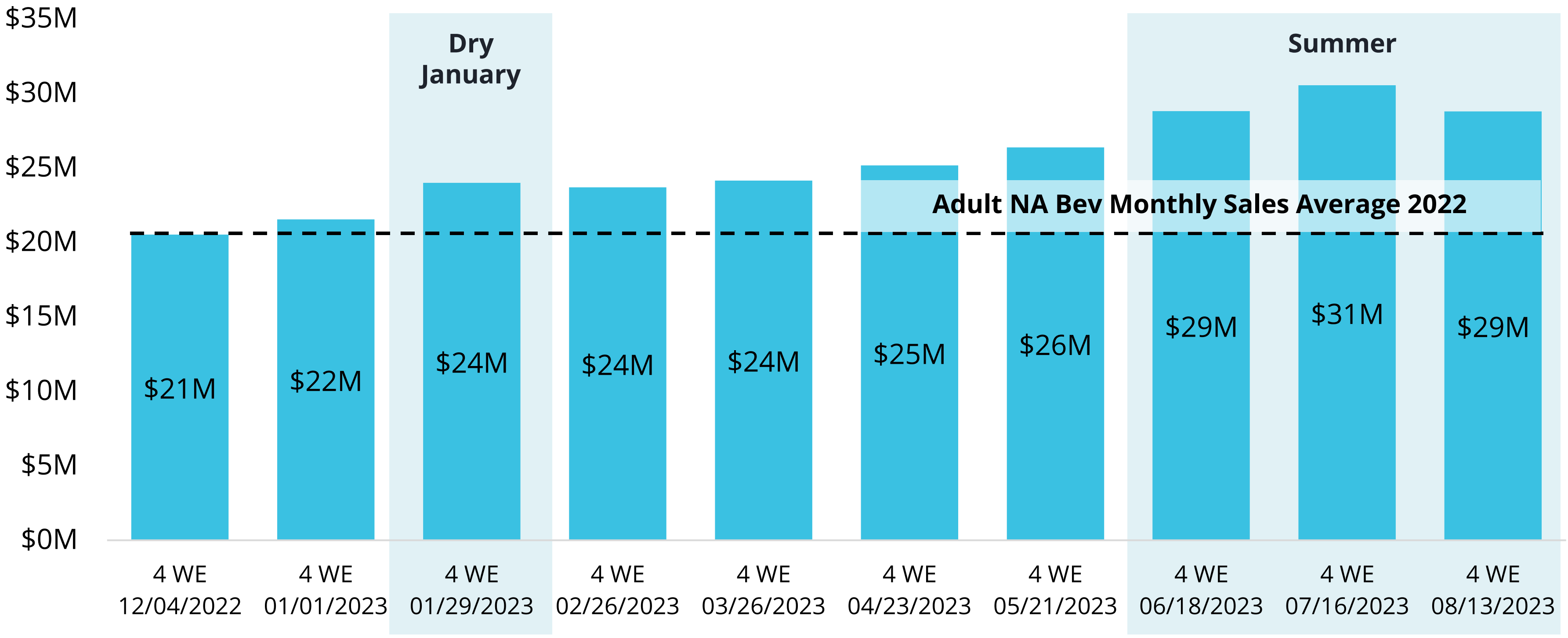
Consumers with food allergies and celiac disease are purchasing more organic foods, 25% and 16% respectively, than the average grocery store consumer

1. NielsenIQ
2. excluding gluten sensitivity and Celiac

Non-Alcoholic Adult Beverages continue a steady rise

Increasingly, consumers are understanding the negative impacts of alcohol on health and the benefits of drinking less. We see NA sales continuing to climb higher in the summer months than dry January, beating out last year's record summer monthly average sales. (~$22.4M).

NA Adult Bev Sales Volume Growth



34% are trying to **DRINK LESS** in 2023

28% have tried to **BREAK UP** with alcohol

1 in 4 know about the **SOBER CURIOUS** Movement

63% learned from social media

56% of Non-Drinkers just don't want to drink.
70% of Gen Z.

Only 17% use marijuana, only 11% Gen Z

Source: SPINS Natural Channel, MULO (powered by Circana), 52 Weeks Ending 8/13/2023

- **Polling question: (Word Cloud) As you think about Regenerative Ag, what comes to mind first?**

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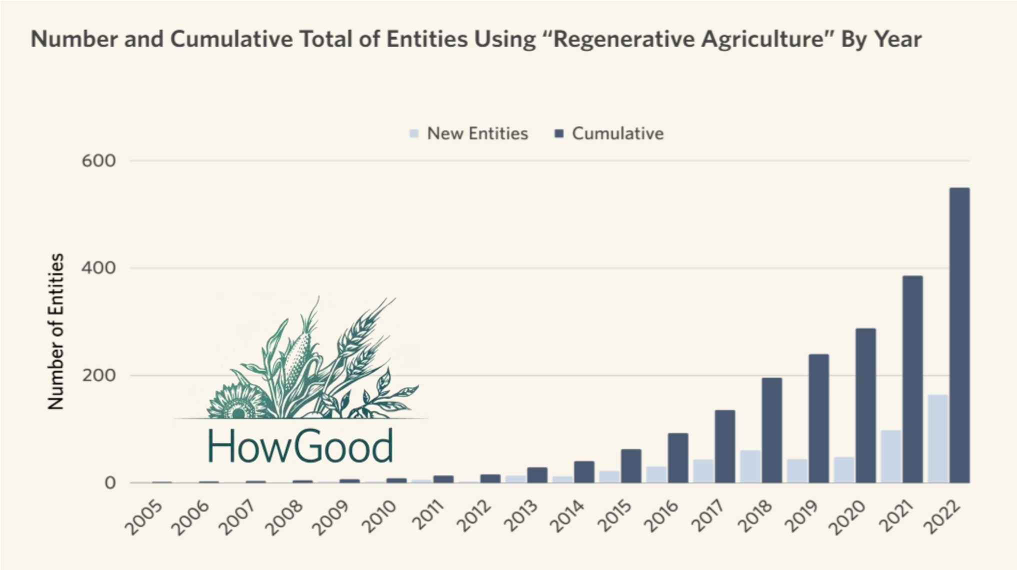
Regenerative Agriculture
Good for Sustainability | Better for Your Health

Nutrient Density Alliance

Tina Owens
Lead, Nutrient Density Alliance


$1+ Trillion
The collective sales of the top 58 companies in Regen Ag

Growth in the Regen Ag Sector



The number of companies adopting regenerative agriculture practices has grown by nearly 130%, from at least 239 in 2019 to at least 549 in 2022.

https://howgood.com/regenerative-industry-landscape/
Snowshoeregeneration.com / $1T of companies

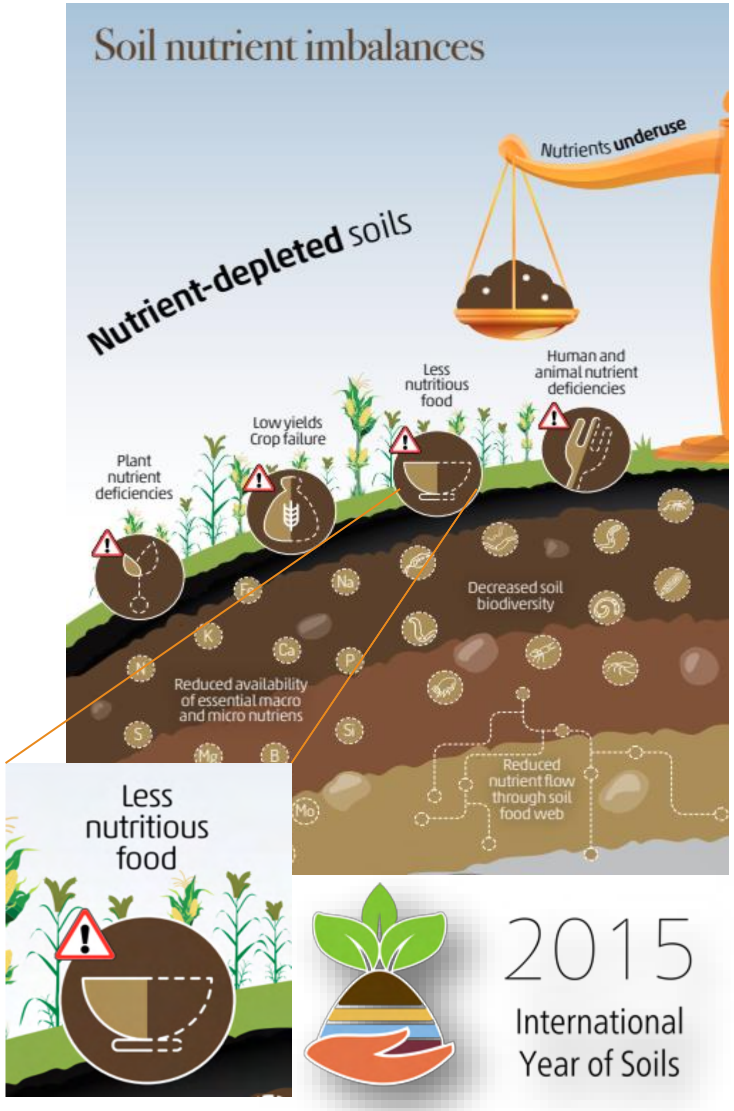
Regen Ag is Not Just Soils….It's Nutrition

"Nutrient-deficient soils will produce nutrient-deficient plants, ultimately causing people suffering with nutrient deficiencies.

The chronic lack of micronutrients derived from nutrient deficient soils and crops cause severe and invisible health problems known as hidden hunger, which affects more than 2 billion people in the world"

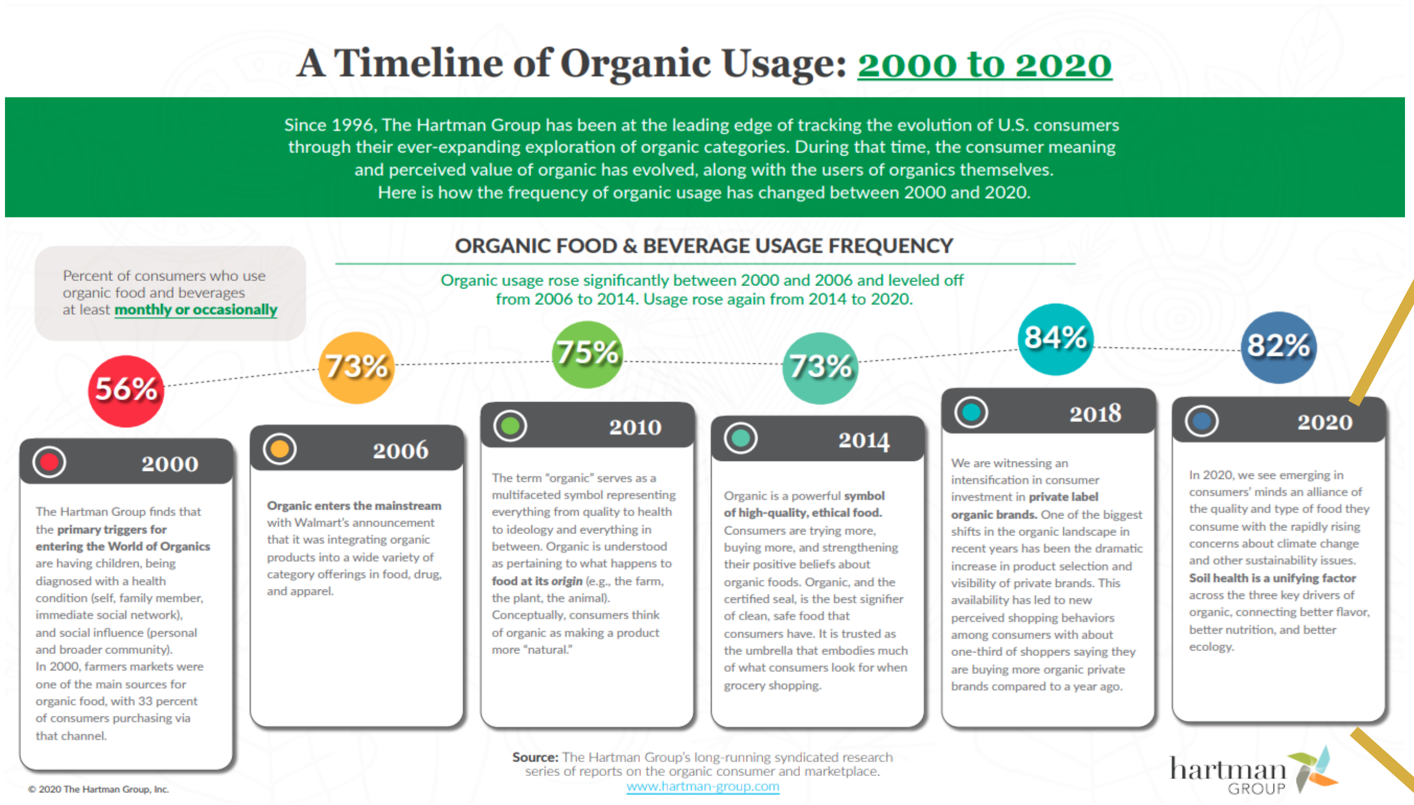
Food and Agriculture Organization of the United Nations

United Nations



2015 International Year of Soils

Organic Consumers' Purchase Intent Since 2020



2020

In 2020, we see emerging in consumers' minds an alliance of the quality and type of food they consume with the rapidly rising concerns about climate change and other sustainability issues. **Soil health is a unifying factor** across the three key drivers of organic, connecting better flavor, better nutrition, and better ecology.

hartman GROUP

Soil & Climate Alliance

$1T

Companies

Regen Ag is fully mainstream in CPG

hartman GROUP

57%

Consumers

Are aware of Regen Ag (2021). About Climate, Health and Food Justice
(up 10% from 2019)

SPINS®

66%

Purchasing

Americans now choosing products based on personal health needs (2022)

Nutrient Density Alliance

Regen Ag offers clear **consumer-centric** narratives based on:

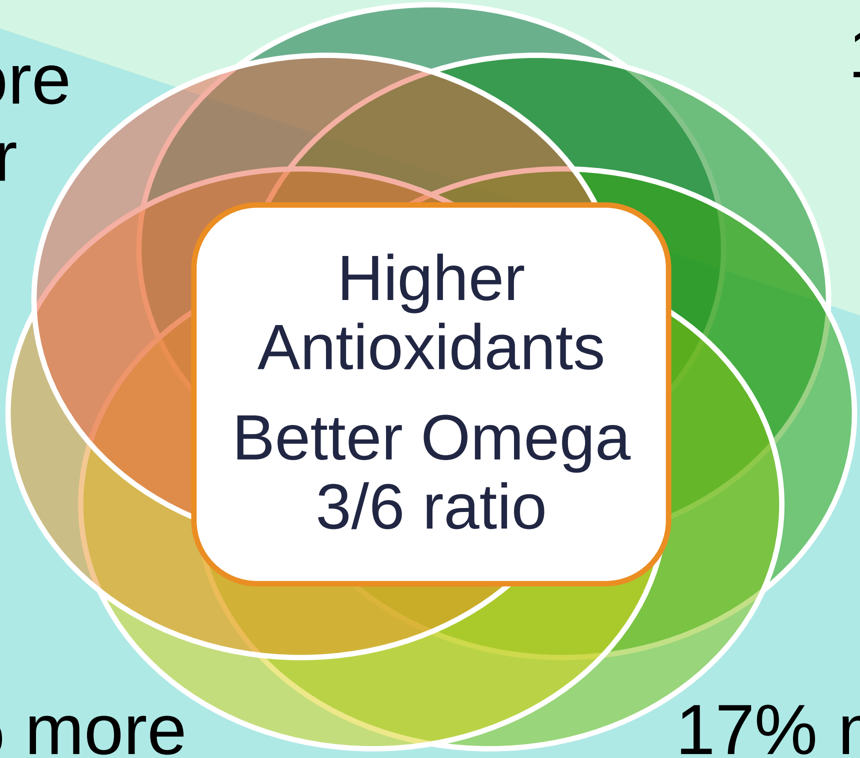
- *Taste*
- *Health*
- *Quality*
- *Nutrition*

Higher Nutrient Outcomes with Regen Ag

34% more vitamin K

27% more copper

15% more vitamin E



16% more phosphorus

14% more vitamin B1

11% more calcium

17% more vitamin B2

https://sundialwineandwellness.com/food-with-high-nutrient-density/#healthy-soil

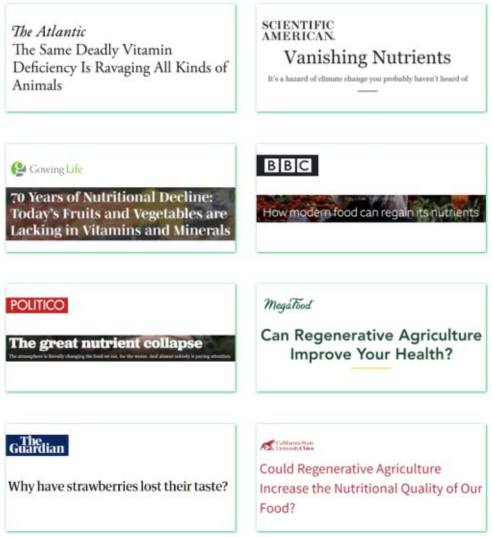
Literature showing the link between soil + nutrition

JOHN DEERE

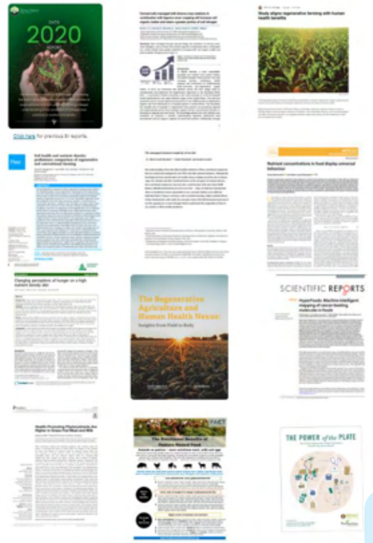
NO-TILL FARMER
The No-Till Authority Since 1972

Successful Farming at AGRICULTURE.COM™

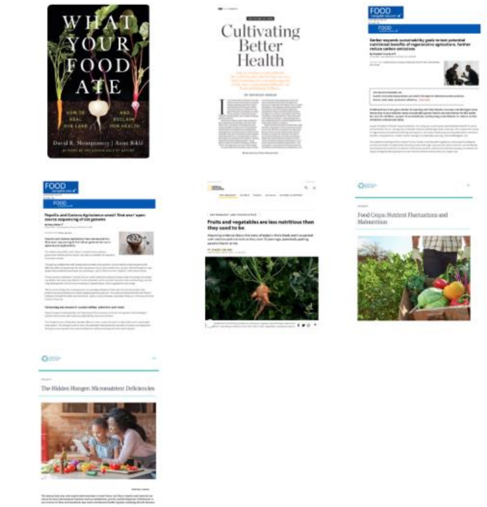
THE EXISTING NUTRIENT DENSITY GAP



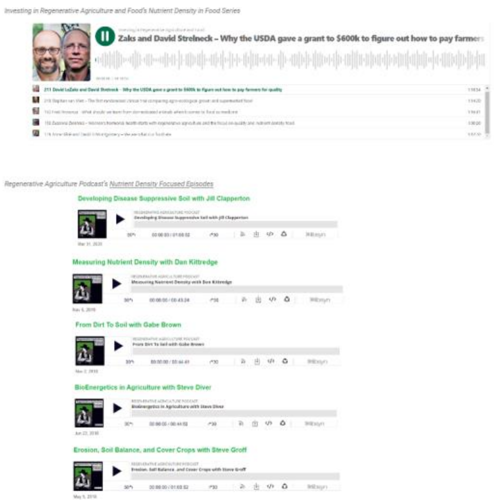
EXISTING INDUSTRY RESEARCH & REPORTS

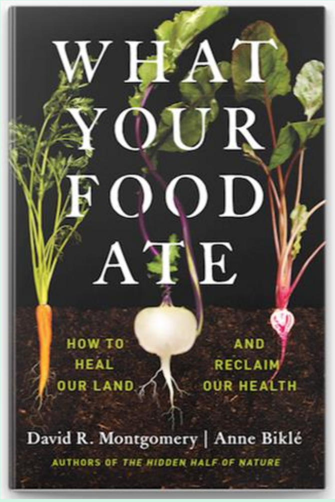


EXISTING ARTICLES & BOOKS

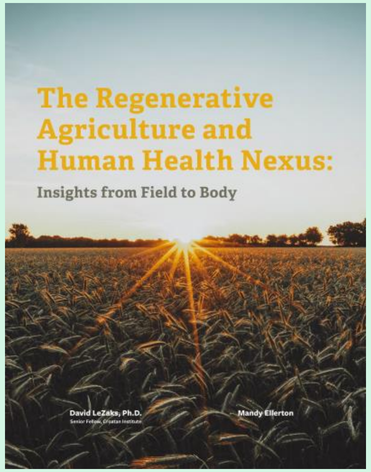


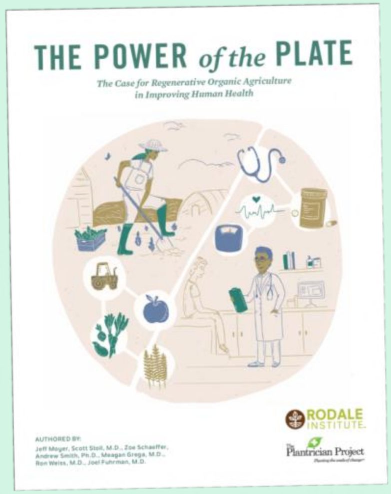
PODCASTS



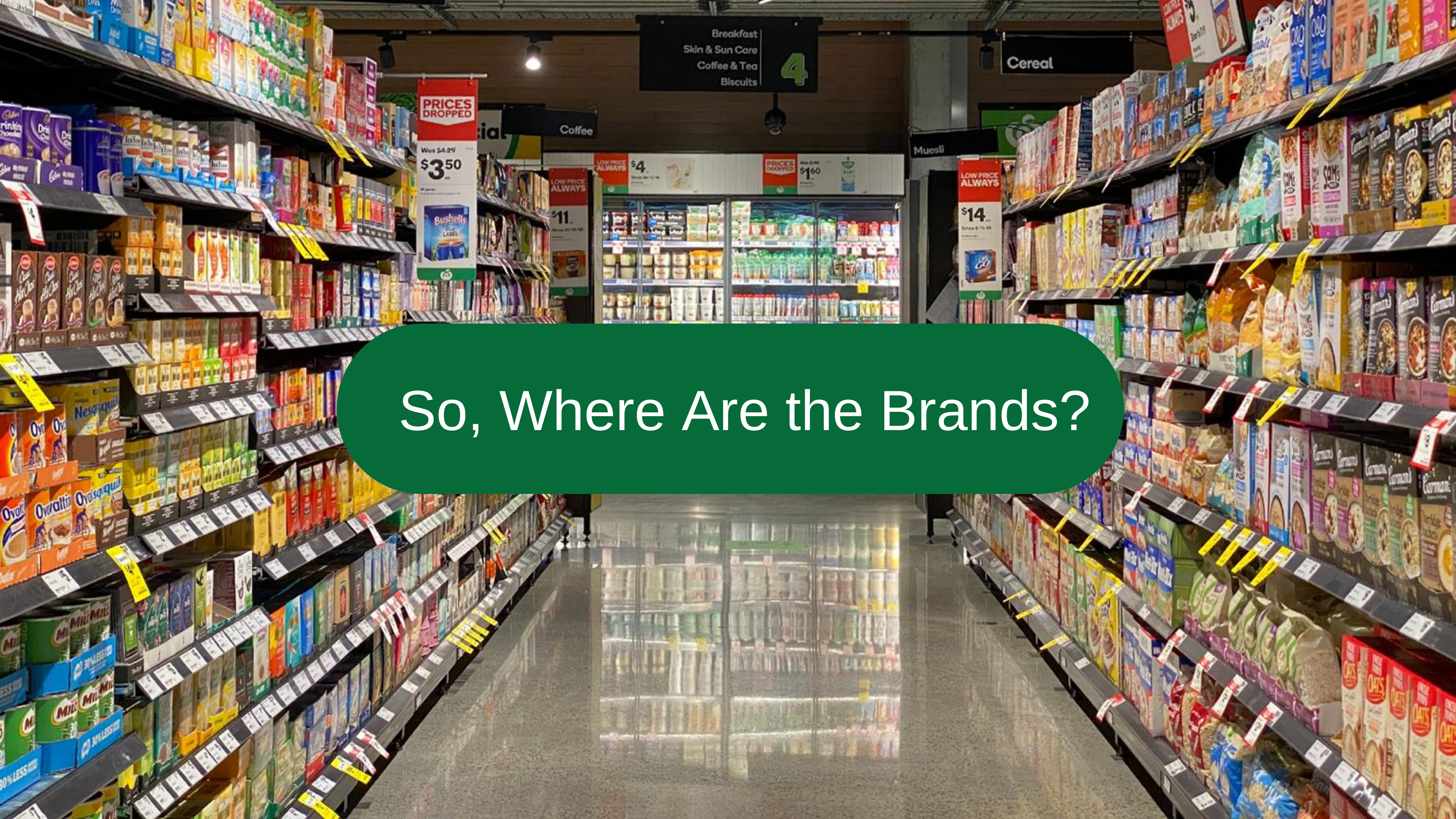


New to this? Start here…





So, Where Are the Brands?



Several brands are already tying Regen Ag and nutrient density together for consumers, or have active research underway

patagonia PROVISIONS®

KING ARTHUR BAKING COMPANY ESTD 1790

PERDUE® PASTURE BIRD — ROTATED DAILY · MOBILE COOPS

Perdue Farms Expands Pasture-Raised Chicken Program, Unique Raising Practice Yields Increased Nutrient Density and Regenerative Environmental Benefits

Unilever

Does the way we grow food impact its nutrient content? Research shows it can

Good Culture lands $64m Series C funding: 'Many nutrient dense, cultured food categories are on the table for innovation'

By Mary Ellen Shoup
23-Feb-2022 - Last updated on 23-Feb-2022 at 15:33 GMT

Alexandre FAMILY FARM™ ORGANIC A2/A2

big picture FOODS™

Nestlé Gerber®

alec's™ ICE CREAM

Philosopher™ FOODS

Gerber expands sustainability goals to test potential nutritional benefits of regenerative agriculture, further reduce carbon emissions

Most CPGs are forgetting to tie their Regen Ag efforts to topline growth.

Go beyond this mindset

And embrace this mindset


The Consumer is Waiting

Want to join us?

Towens@soilclimatealliance.org
nutrientdensityalliance.org

Nutrient Density Alliance

Evolving Our Perspectives on Plant Based and Protein

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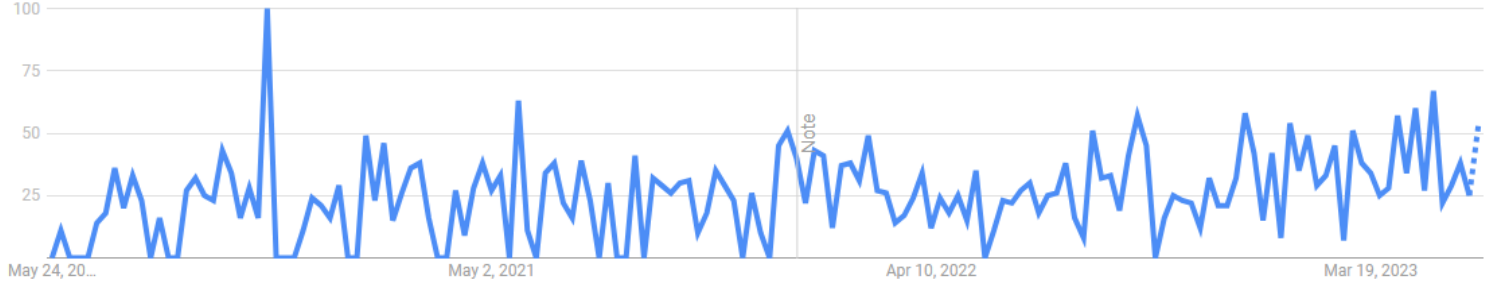
Speed to awareness is increasing

Consumers are rapidly learning in new ways about individual and planetary health alongside suggested solutions to improve.

Worldwide Plant-Based Dairy Web Searches

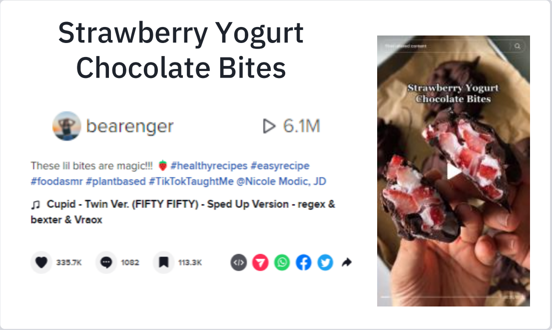
3 Year Timeframe

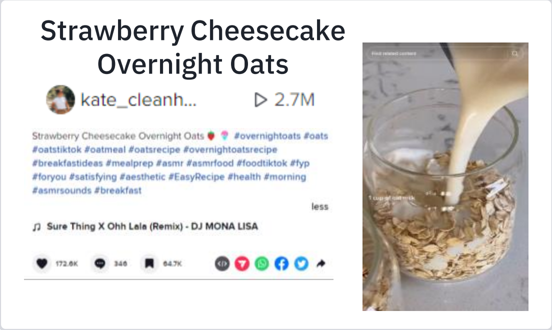


Top Regions Of Interest In Plant-Based Dairy

1. Australia
2. Ireland
3. United States
4. Canada
5. United Kingdom

TikTok Viral Recipes

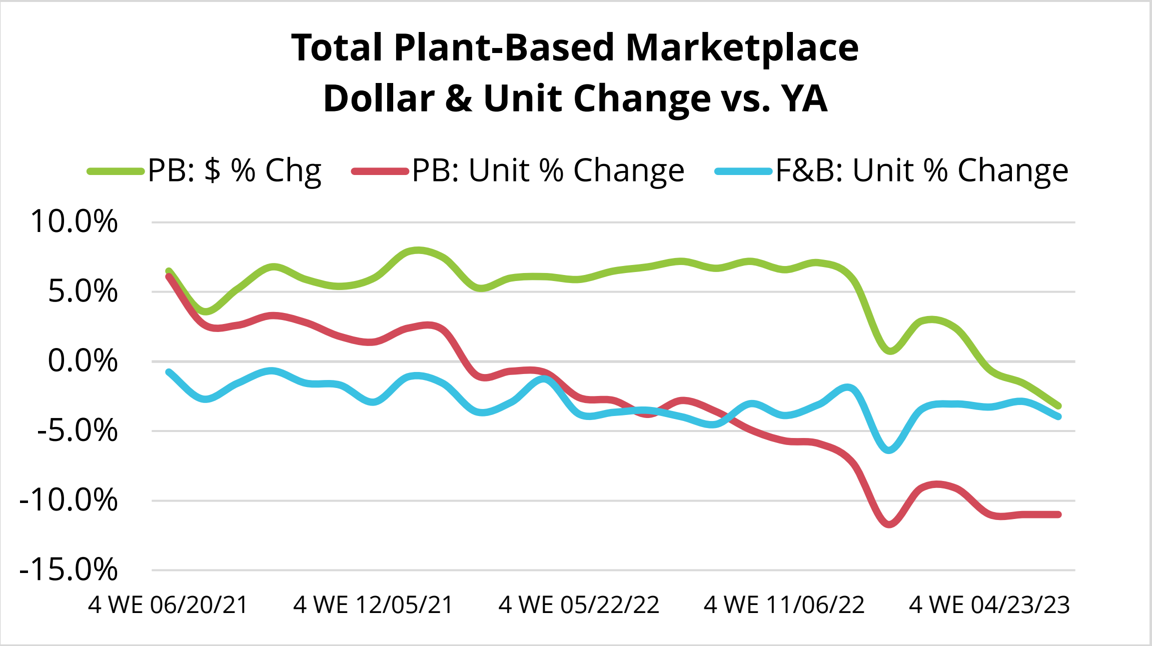




Streaming

Plant-Based Performance: By Category

Overall, plant-based dollars and units have had a tough year with continued decline from 2020-21 highs. However, there are indicators of the future of plant-based trend growth through new approaches and expansion.



Performance Ranked by Volume			
Type	Sales	$ Chg YoY	U Chg YoY
RF PB Milk	**$2.2B**	**4.1%**	**-9.5%**
FZ Meat Alternatives	**$824M**	**-3.3%**	**-15.1%**
Creams & Creamers	**$686M**	**18.0%**	**7.0%**
RF Meat Alternatives	**$420M**	**-18.1%**	**-20.9%**
RF PB Yogurt	**$384M**	**-2.0%**	**-11.4%**

Performance Ranked by Growth			
Type	Sales	$ Chg YoY	U Chg YoY
Shelf Stable Salsas & Dips	**$2M**	**320.7%**	**321.6%**
Shelf Stable Jerky & Meat Snacks	**$26M**	**23.6%**	**15.0%**
Creams & Creamers	**$686M**	**18.0%**	**7.0%**
Shelf Stable Soup	**$41M**	**16.9%**	**-2.9%**
Shelf Stable Tea & Coffee RTD	**$21M**	**15.6%**	**27.3%**

Source: SPINS Total US Natural Enhanced Channel + Multioutlet (powered by Circana), Powered By SPINS Proprietary PI 52 Weeks ending 8.13.2023

Plant-Based Milk

Milk is feeling the impacts of inflation, but Oat, Coconut, Pea, and Other Milks are bright spots with unique offerings that are driving growth and new interest in the category. Plant-based milks now have over 44% of US households purchasing with 35% buying at least twice over the last year.

Type Performance Ranked by Volume

RF & SS Plant-Based Milk	$2.8B	+5%	-6%
Animal Type	Sales	$ Chg YoY	U Chg YoY
Almond	$1.3B	-2%	-14%
Oat	$643M	+15%	+2%
Soy	$175M	+4%	-11%
Coconut	$137M	+38%	+26%
Pea	$73M	+16%	+3%
Blend	$70M	+2%	-11%
Cashew	$45M	+6%	-14%
Rice	$35M	-4%	-14%
Flax	$12M	-8%	-15%
Other	$4M	+11%	+6%

Bright Spots In Plant-Based Milks

Source: SPINS Total US Natural Enhanced Channel + Multioutlet (powered by Circana), Powered By SPINS Proprietary PI 52 Weeks ending 8.13.2023
SPINS Consumer Panel (powered by Circana) week ending 8/13/23

The Future of Protein

Technology has enabled new ways of thinking about proteins and new ways to produce dairy or meat, either directly from animals or plants or by cultivating it from animal cells.

Regenerative Ag lessens sustainability concerns of meat

'Next Gen' Ingredients Are Category Disruptors. Precision Fermentation 'animal free dairy hits the shelves

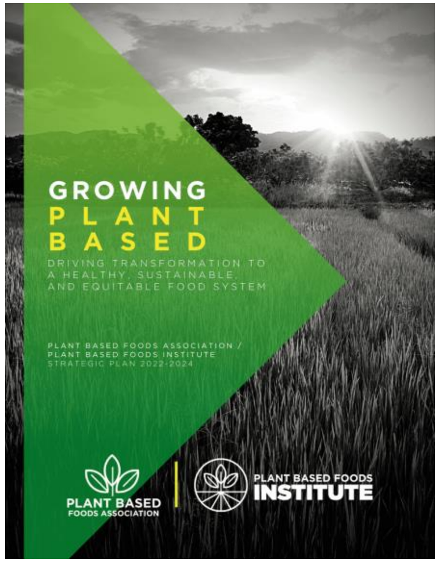
United States

Those Vegan Cowboys, Netherlands

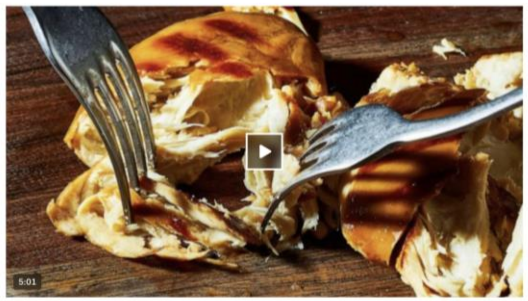
Israel

*Note: this is based on only 6 items in SPINS non animal dairy protein coding currently

Plant based continues to evolve



Cultivated Meat readies for US Market


USDA approves 1st ever 'cell-cultivated meat' for 2 American manufacturers

UPSIDE will cultivate and sell chicken grown from animal cells in bioreactors.

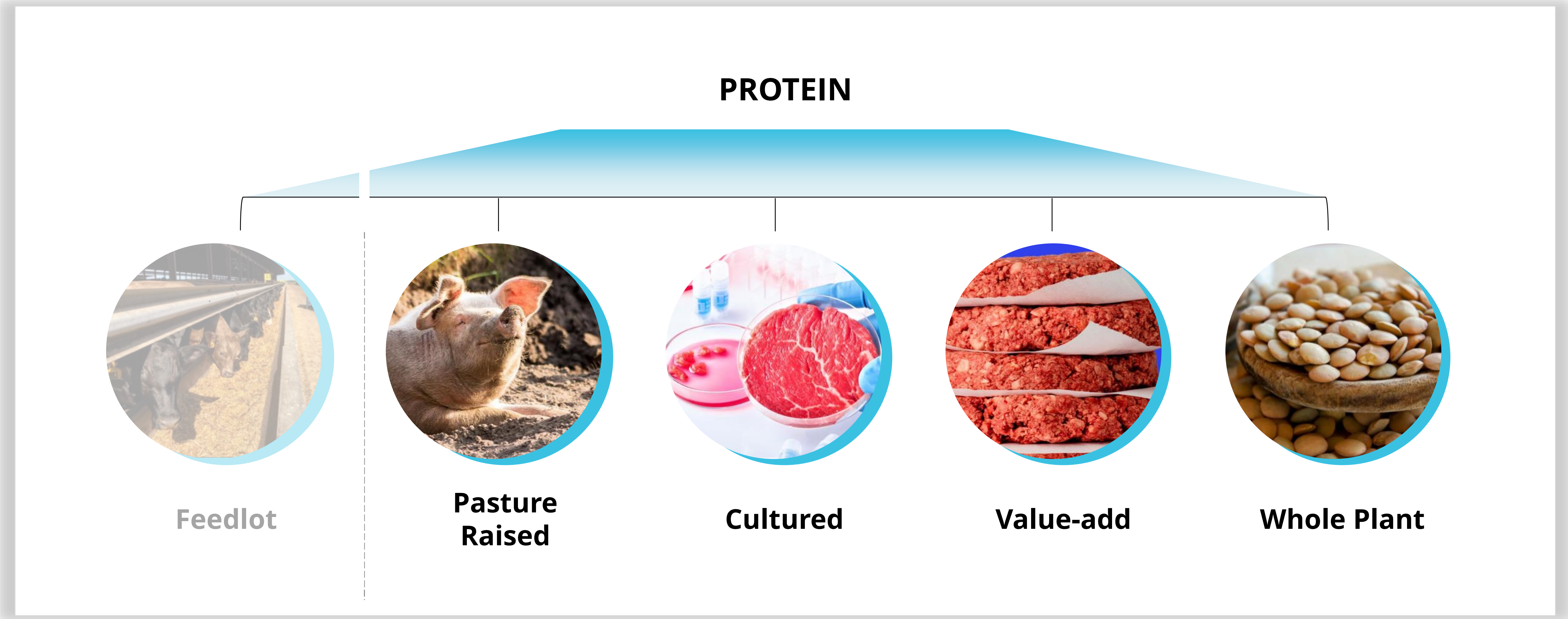
By Kelly McCarthy GMA
June 22, 2023, 10:04 AM

5:01

GOOD Meat cultivated chicken.
GOOD Meat

Global Population is Maximized with Diversity of Protein Sources

Optimized Mix of Protein is Governed by Land and Energy Availability



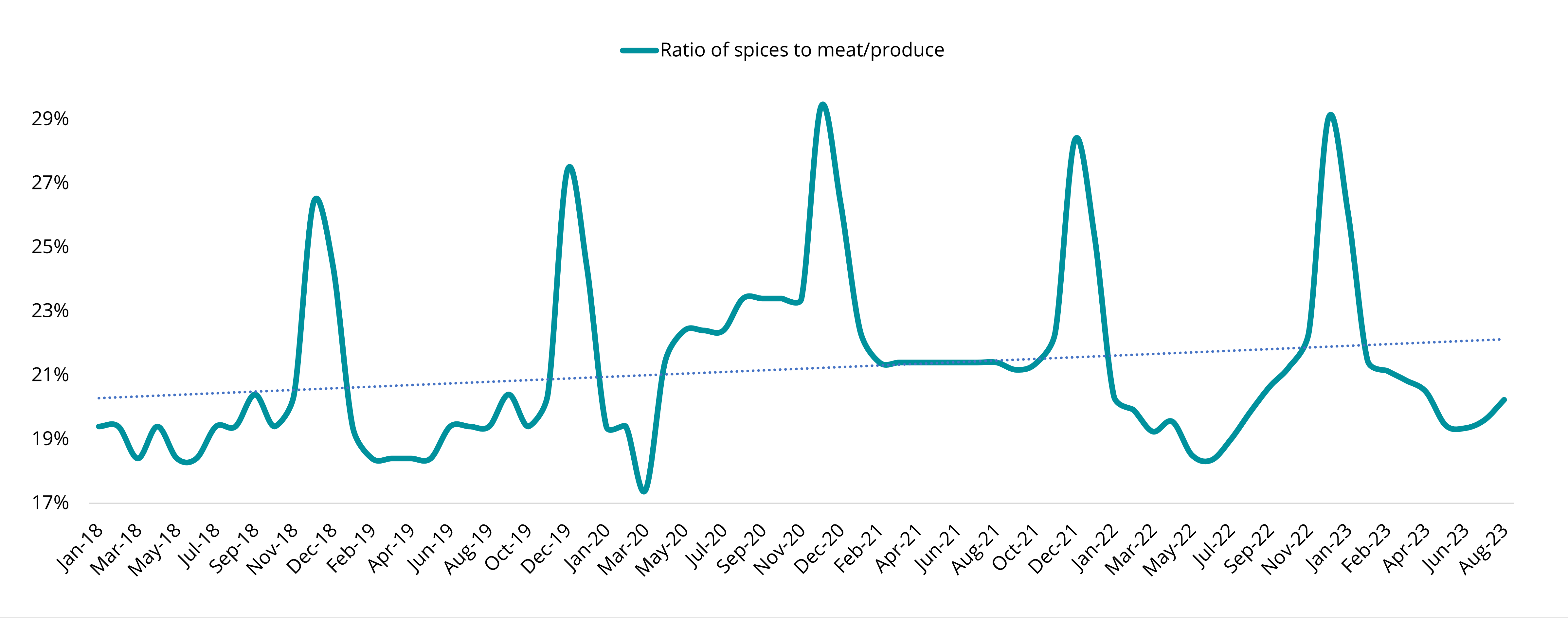
Polling question: (Word Cloud) What is one word or idea that comes to mind when you think of plant based?

The Rise of Global CPG and Grocery Experiences

SPINS | whipstitch CAPITAL | New Hope NETWORK

Multicultural Cuisine is Influencing American Cooking

Increasing Ratio of Spices to Produce + Meat Indicates a Changing American Palette[1]



SPINS 4 WE 8/13/23, total US – FOOD, (PRODUCE PACKAGED HERBS + SS SPICES & SEASONINGS) / (FZ & RF BEEF & PORK CUTS + FZ & RF POULTRY CUTS + PRODUCE PACKAGED VEGETABLES)

Global Experiences

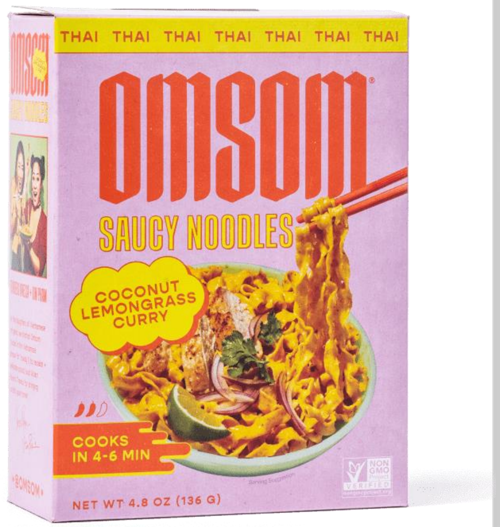
Emerging International brand profiles are disrupting center store in meal, sauces, & appetizer categories as shoppers continue to clamor for diverse and/or familiar at-home meal solutions.

Emerging International Groupings

International	Sales	%growth YoY
Asia– General	$4.0B	
Asia – India	$291m	+17%
Asia – Korea	$250m	+32%
Asia – Vietnam	$9m	+8%
Africa – General	$17m	+19%
Africa – Other Specific	$12m	+19%
Europe - Ireland	$559m	+20%
Europe - Poland	$153m	+16%
Hispanic / South Am – Columbia	$72m	+34%

Buyers indexing higher and spending more total dollars on **Asian, African & Hispanic** products are likely to be:

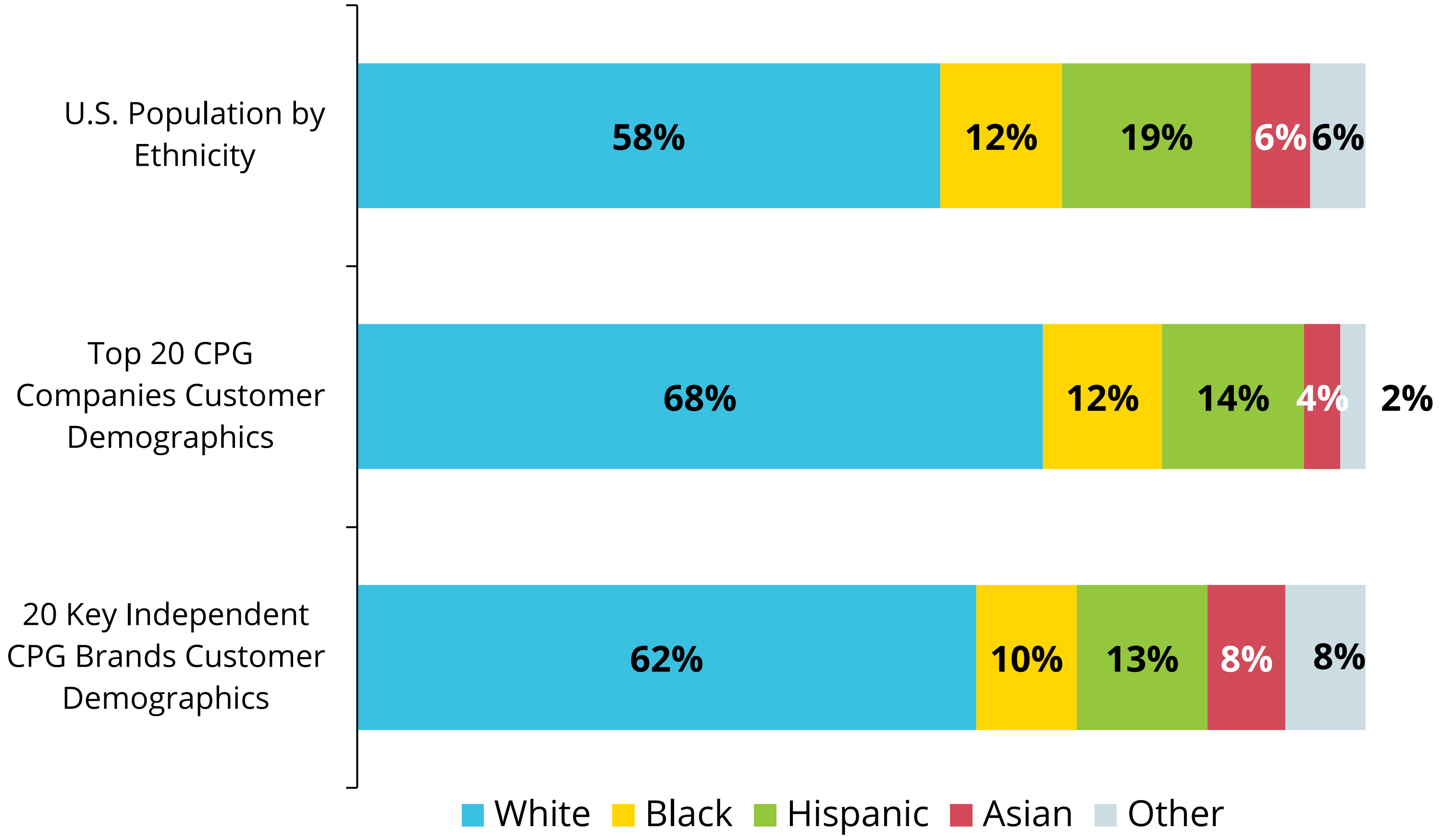
- Younger, espec Millennials
- Married or a couple
- Have children in the home.



Source: SPINS Natural Channel, MULO (powered by Circana),
SPINS Consumer Panel (powered by Circana)
SPINS International Positioning Group Attribute, 52 weeks ending 8/13/2023

CPG Companies that Embrace Diversity of Thought Have Greater Growth

There is an Incremental Growth Opportunity By Aligning Customer Base with U.S. Population[1,2,3,4]



Companies that Cater to Diverse Population Over-indexing on Growth

	Top 20 Largest CPG	**20 Key Independent CPG Brands**
Growth rate of companies that **are catering to population** yoy sales growth	4%	14%
Growth rate of companies that are **not catering to population** yoy sales growth	0.6%	7%

1. NielsenIQ
2. U.S. Census, 2020
3. SPINS 52 WE Ended 1/23/22, MULO + Convenience + Natural
4. NielsenIQ 52 WE 8/27/22, Total Outlets

Polling question: (Word Cloud) What's one new flavor or multicultural cuisine you've experienced in the last 12 months?

WELCOME TO OUR HOUSE ✷ WELCOME TO OUR HOUSE ✷ WELCOME TO OUR HOUSE ✷ WELCOME TO OUR HOUSE

omsom

PROUD + LOUD ASIAN FLAVORS


THAI THAI THAI THAI THAI THAI
OMSOM
SAUCY NOODLES
COCONUT LEMONGRASS CURRY
COOKS IN 4-6 MIN
NET WT 4.8 OZ (136 G)
CHINESE CHINESE
OMSOM
SOY GARLIC
CHINESE CHINESE CHINESE
OMSOM
SAUCY NOODLES
SOY GARLIC
SAUCY NOODLES
VIETNAMESE VIETNAMESE

OM SÒM

A VIETNAMESE PHRASE MEANING NOISY, RAMBUNCTIOUS, RIOTOUS. MOST OFTEN USED BY PARENTS (HINT: OURS) TO SCOLD UNRULY, RAUCOUS CHILDREN IN THE BACK OF THE CAR.

MEET THE FOUNDERS

We're Vanessa + Kim Pham, the sisters and co-founders behind Omsom. We're daughters of Vietnamese refugees, who grew up at our family's kitchen counter, watching our Mẹ cook Viet dinners from scratch every night. Like so many Asian moms, this was her love language to her children.

In our past lives, we cut our teeth in startups and consulting. We returned to our roots to finally build the company of our dreams — one that proudly reclaims + celebrates the multitudes to be found in Asian flavors, stories, and communities.

This is our fiery love letter to our people (that's you!), our food, and our Phamily (both ancestors and chosen).

Pull up a stool and grab a bowl – welcome to our house.

Vanessa Pham Kim Pha

MEET THE FOUNDERS

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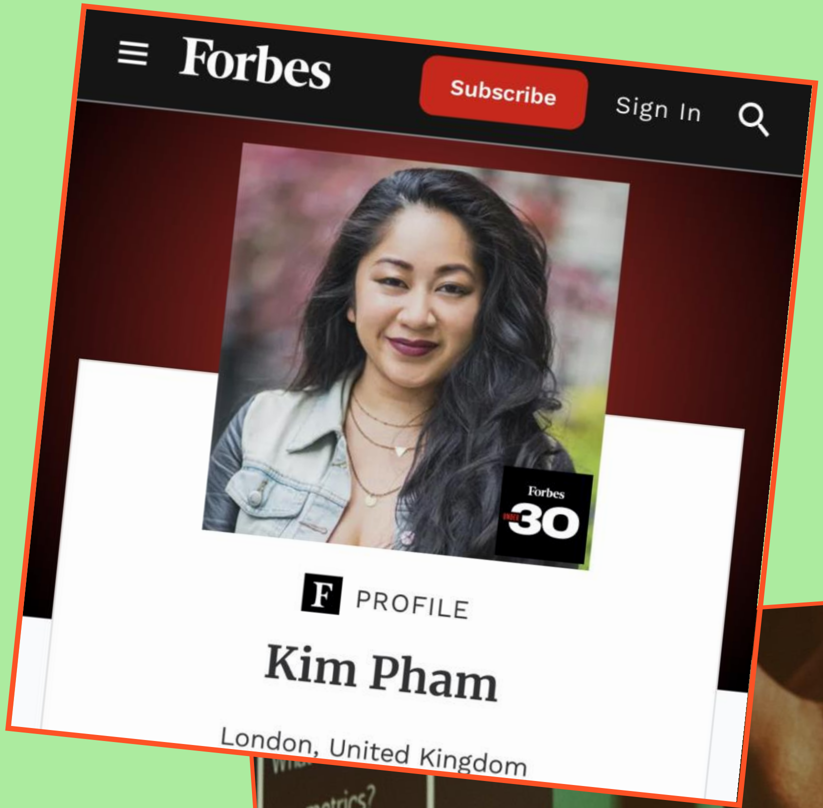
HARVARD UNIVERSITY


BAIN &


Forbes
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PROFILE
Kim Pham
London, United Kingdom


metrics?

FoodNavigator USA

From Matcha to Sriracha: Asian Flavor Trends from the World's Leading Expert in Eastern Food & Beverage Flavors

28-Feb-2022

SHARE

It's official – Asian food is the fastest growing cuisine in the United States.

According to a Euromonitor report, sales of Asian QSR food grew by more than 135% over the last 25 years and the category has a CAGR of 11.8% forecasted through 2026. The

The Washington Post

Democracy Dies in Darkness

Economic Policy

Asian food: The fastest growing food in the world

Pew Research Center

RESEARCH TOPICS ALL PUBLICATIONS METHODS SHORT READS

Home > Research Topics > Race & Ethnicity > Racial & Ethnic Groups > Asian Americans

APRIL 9, 2021

Asian Americans are the fastest-growing racial or ethnic group in the U.S.

BY ABBY BUDIMAN AND NEIL G. RUIZ

Asian Americans recorded the fastest population growth rate among all racial

Asian Americans were the fastest-growing racial or ethnic group in the U.S. from 2000 to 2019 ...


CNN underscored
Omsom sauce kits are one of the best cooking products we've ever tested
By Kate Bratskeir and Kate Bratskeir


SAVORY LEMONGRASS MARINADE
LEMON GRASS BBQ
8 PACKETS
NET WT 19.2 OZ (544 G)
OMSOM
INTERNATIONAL WOMEN'S DAY
WOMEN-OWNED BUSINESSES
OMSOM
FOUNDERS: VANESSA & KIM PHAM | OMSOM.COM
TODAY


CBS MORNINGS
CHANGING THE GAME
CELEBRATING ASIAN FLAVORS
SISTERS & CO-FOUNDERS KIM AND VANESSA PHAM ON THEIR FOOD BRAND OMSOM
8:35 61°


INSIDER
Subscribe
These first-generation sisters left consulting and VC careers to find purpose through entrepreneurship. Their Asian-food starter business has sold 800,000 units in 18 months.


12:17
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Posts
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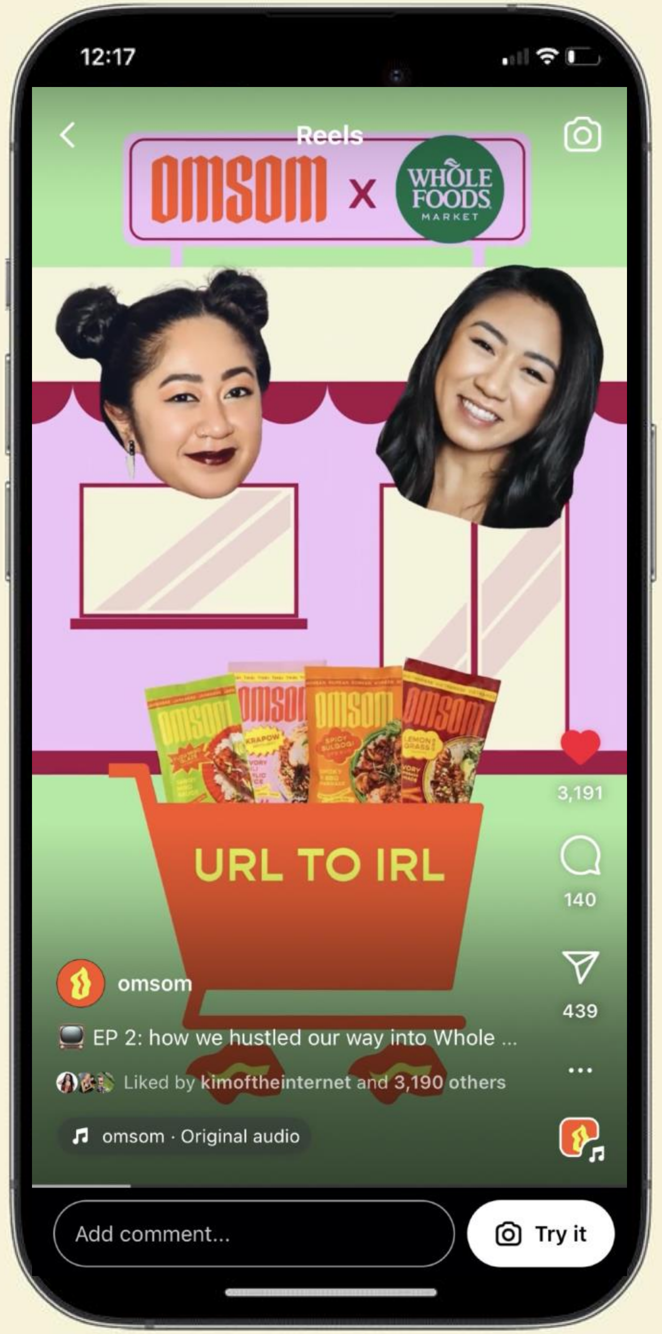
Whole Foods Market
WHOLE FOODS MARKET
OMSOM JUST LAUNCHED NATIONWIDE AT WHOLE FOODS
Liked by kimoftheinternet and 9,212 others
omsom OMSOM IS NOW IN @WHOLEFOODS NATIONWIDE!
We launched in May 2020 to an online world hungry for proud, loud Asian flavors. In the last 2 years, we've dropped 7 sauces with 7 Asian chefs, sold out 11x, and launched collabs with Instant Pot + Disney
Send message


12:17
Reels
omsom x WHOLE FOODS MARKET
URL TO IRL
3,191
140
439
omsom
EP 2: how we hustled our way into Whole ...
Liked by kimoftheinternet and 3,190 others
omsom · Original audio
Add comment...
Try it

omsom • Following

omsom We don't use the word "authentic" to describe what we do 🤔 It's okay if you do, but here's some of our thinking:

Calling for "authenticity" in food is a burden that's often carried by BIPOC chefs + cuisines. This standard creates very specific ideas on how our food should taste, look, and cost 💰

Swipe ➡️ to learn more about:
🧐 How the term "authenticity" rose to prominence
👁️ Why it's an ambiguous, ever-changing, + unfair expectation (often held by our own communities!)
🗣️ How calls for merciless "authenticity" can restrict BIPOC

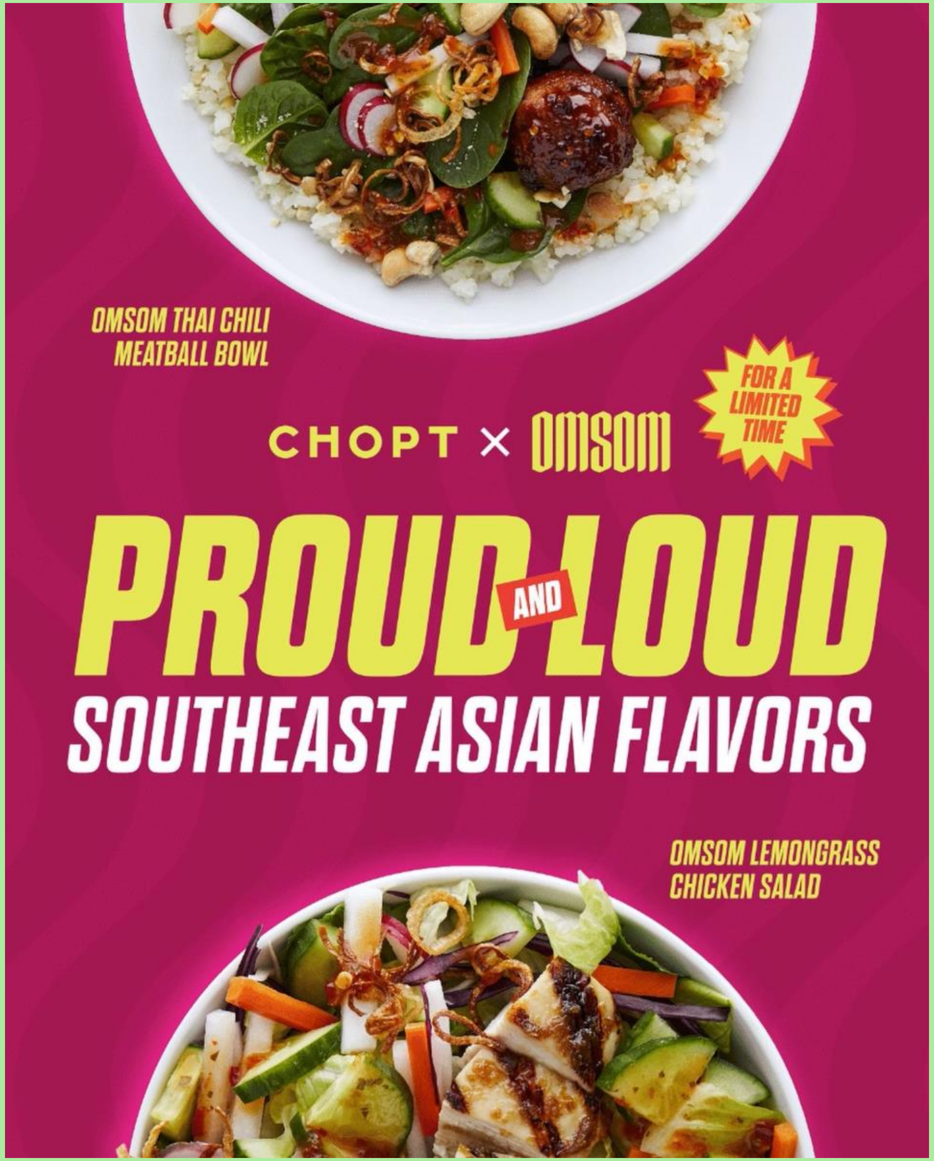
Liked by **emchan68** and **3,515 others**

MARCH 11

Add a comment... Post

DISNEY
RAYA
THE LAST DRAGON
IN THEATERS
MARCH 5
OMSOM
SOUTHEAST ASIAN OMSOM SAMPLER
EXCLUSIVE RECIPES INSIDE
@OMSOM
LARB
LEMONGRASS
LET'S PLAY

Disney



OMSOM THAI CHILI
MEATBALL BOWL
FOR A LIMITED TIME
CHOPT × OMSOM
PROUD AND LOUD
SOUTHEAST ASIAN FLAVORS
OMSOM LEMONGRASS
CHICKEN SALAD


CHINESE CHINESE CHINESE
OMSOM
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COCONUT LEMONGRASS CURRY
VIETNAMESE VIETNAMESE
GARLIC BLACK PEPPER
@OMSOM
CHILI SESAME

CHANGING THE FACE OF AMERICAN GROCERY

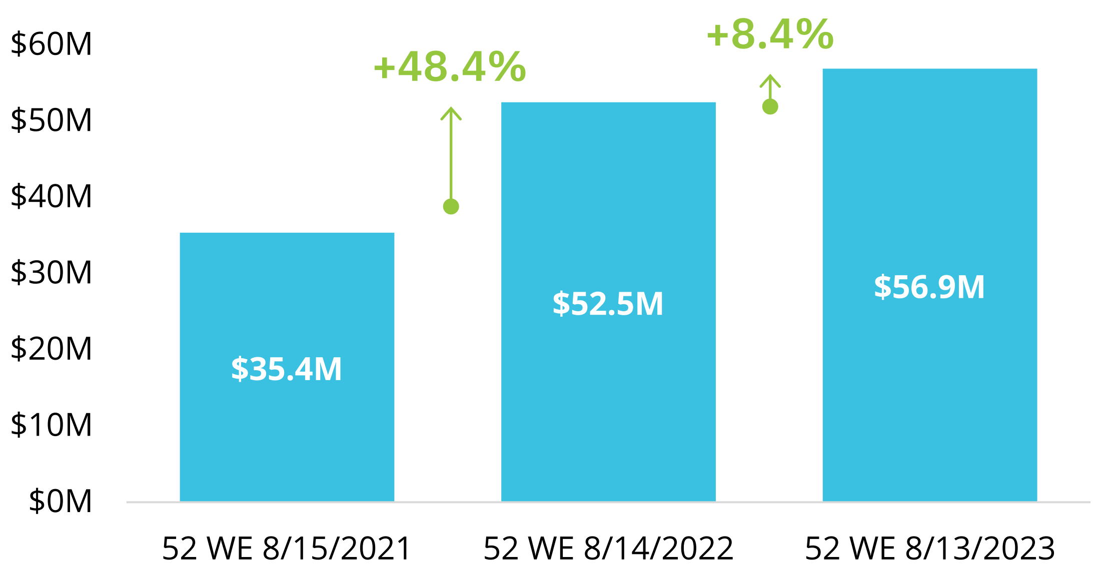
Turning Planetary Priorities into Action

SPINS | whipstitch CAPITAL | New Hope NETWORK

Upcycled Products build further awareness

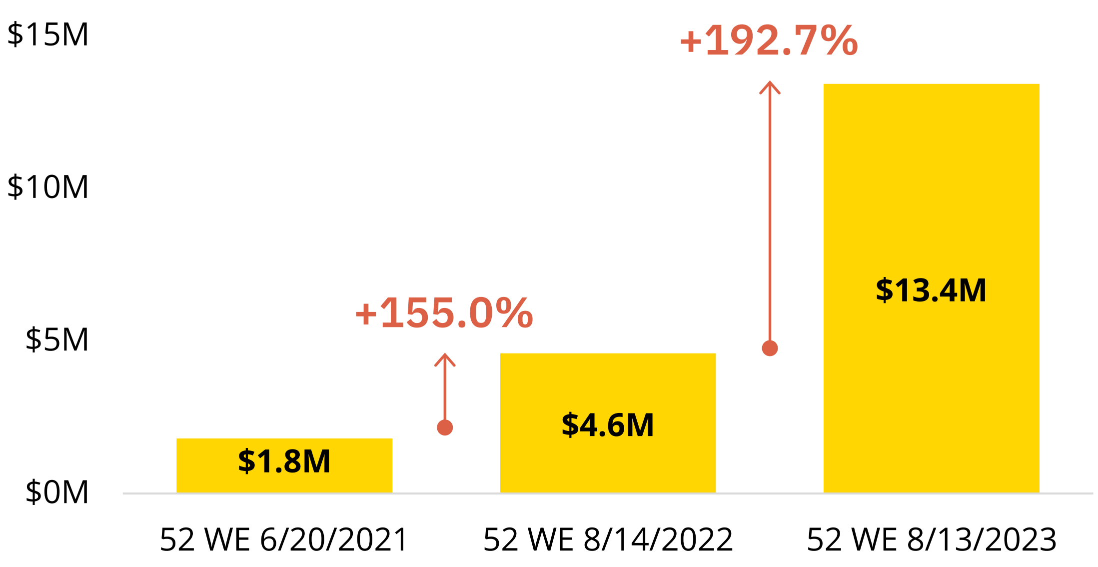
Expansion into categories such as Snacks continue to bring further choice for shoppers seeking sustainable options.

Dollar Sales of Certified Upcycled Products



UNITS %CHG, 2YA	UNITS %CHG, 1YA
+60.8%	**+3.8%**

Dollar Sales of Certified Upcycled Snack Products



UNITS %CHG, 2YA	UNITS %CHG, 1YA
+515.2%	**+166.4%**

Source: SPINS Natural Enhanced Channel & Conventional Multi-Outlet (powered by Circana); 52 Weeks Ending 08.13.23 ; 08.14.22 ; 08.15.2021 Attribute: Certified Upcycled

Good for the Planet

Dairy categories continue to raise the bar on increasingly resilient agriculture and production.

'Next Gen' Agriculture Practices are Category Disruptors

Concerns over climate change, soil health, and the effects of a heavy reliance on toxic chemicals have driven the popularity of regenerative agriculture which aims to restore and replenish soil health.

Dairy producers are among the early adopters and are bringing a highly visible sustainability message to shoppers and retailers.

+93% Milk

+53% Refrigerated Eggs

+407%	Certified Regenerative Organic
+20%	Labeled Fair Trade
+11%	Certified B Corp
+16%	Labeled Antibiotic Free
+7%	Labeled Animal Welfare
+10%	Labeled Organic Ingredients
+28%	Labeled Grass Fed
+12%	Certified Non-GMO Project

Everyone and every business can make a difference.

B Lab is the nonprofit network transforming the global economy to benefit all people, communities, and the planet.

"We envision a global economy that uses business as a force for good"

B Corp Declaration of Interdependence

7429 Companies	161 Industries
66,920 Workers	92 Countries

Planetary Health and Wellness Are Priorities for All Consumers

Index of Dollar Purchases – 100 = Average

	Skeptics	Idealists	Minimalists	Healthy Me/ Planet	Evangelists	Total Variation from Index
Natural	98	108	100	102	101	**12**
Sustainable Packaging	98	106	99	104	103	**16**
Environmental Sustainability	97	106	99	104	103	**17**
Clean Label	94	105	99	104	107	**22**
Social Responsibility	86	108	95	116	119	**62**
Better For*	80	112	93	119	130	**88**
Plant Based	81	130	85	133	131	**128**
Organic	72	138	87	129	142	**150**

Most Mainstream

Least Mainstream

NielsenIQ, Total Store 52 WE 7/1/23 – Variation calculated as sum of differences between dollar index and buyer group indexes,
*better for in food & Beverage only

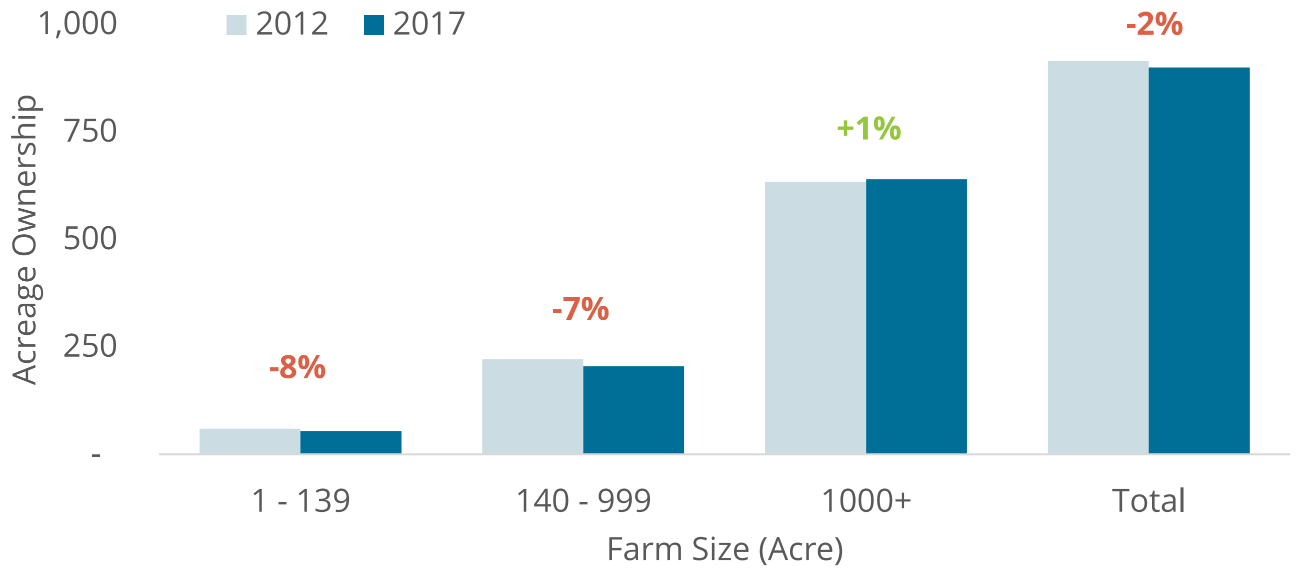
SPINS® whipstitch CAPITAL New Hope NETWORK.

Sustainable Farming Can Benefit Farm AND Population Health

Return per acre and farm profitability can be increased with regenerative and organically grown produce

- There are only 4.4m acres of vegetable crops harvested on US farms – 1.1% of cropland
- Labor cost savings and its impact on prices is a driver of US produce imports
- Regenerative and organic vegetables have a higher returns per acre than conventional equivalents
- Higher profitability per acre can increase US production and make smaller farms more viable

Growth of Farms by Farm Size[1]



# of farms, 2017 (000's)	1,304	565	172	2,042

Polling: (Word Cloud) What is one action, big or small, everyone can take to have a positive impact planetary health?

Shaping Food Futures

Google's Foodshots & Leading for Impact

Michiel Bakker

Vice President, Global Workplace Programs at Google

Food at Google: a global operation

243k+
Meals

Served per day for **160,000+** individuals coming to the office

380+
Cafés

1,500+ Micro-kitchens, **14** teaching kitchens, **44** food trucks

13k+
Associates

With **60** Food Service Partners

58
Countries

In **148** cities around the world







season'd


Google Food Team: Mission

To inspire and
enable the Google
community to
thrive through
their food choices
and experiences.

Google Food Team: Vision 2050

A world that sustainably feeds and nourishes all of humanity.

Four Foodshots

Three lesson learned about leading for impact

- Identify your sweet spot for impact
- You don’t have to lead everything yourself
- Use the right approach for the job at hand


IMAGINE

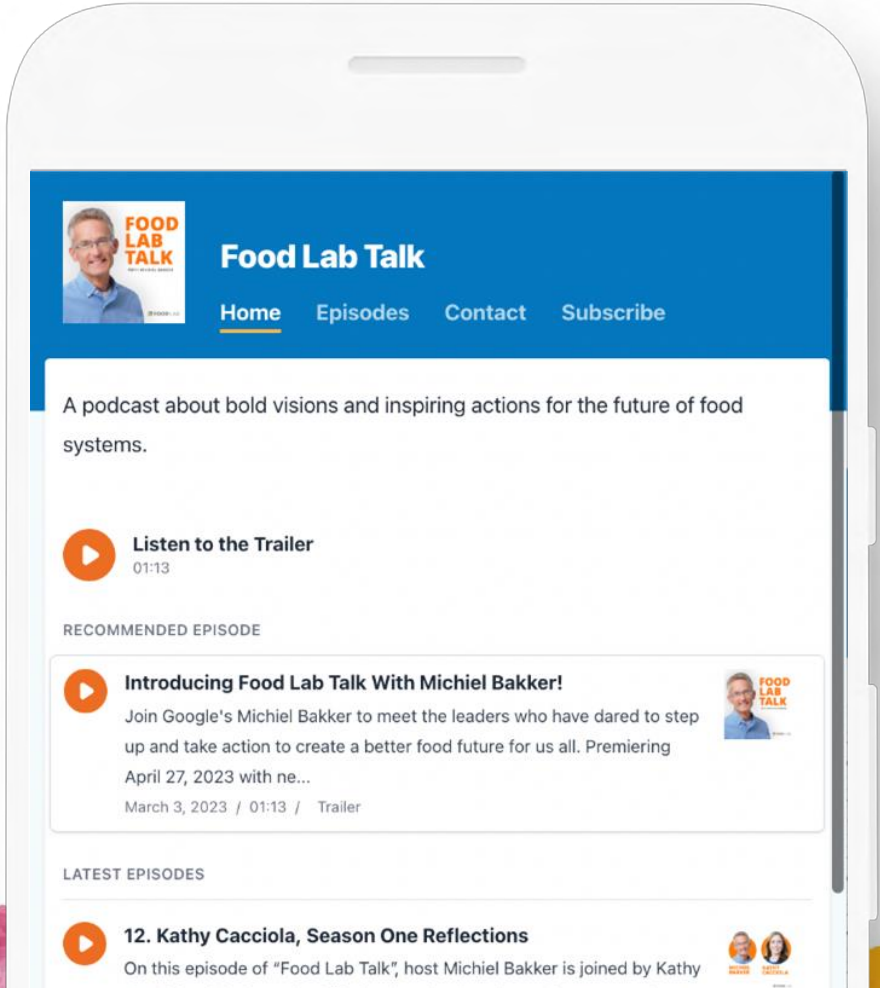

BELIEVE


ACT

Series 2 of Food Lab Talk coming soon.

https://www.foodlabtalk.com/

Thank you



Michiel Bakker

Vice President, Global Workplace Programs at Google

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AUGUST 6-8, 2024 | SAVANNAH, GEORGIA

Where Conscious Products Grow

Thank you!

By Informa Markets