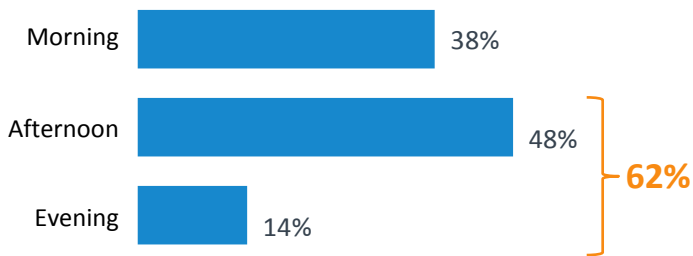


C-STORE SHOPPERS' TAKE ON SWEET SNACKS



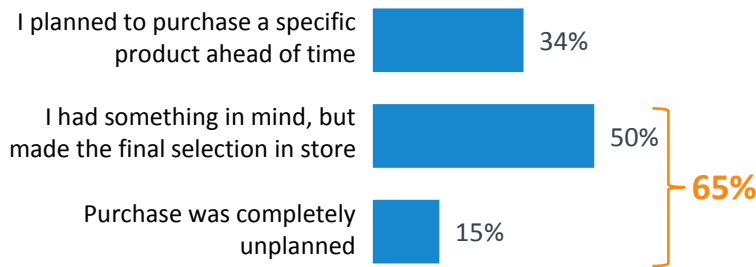
More C-Store Sweet Snacks Satisfy PM Cravings

When do you eat sweet snacks after purchase from a C-store?



Over 2/3rds of Sweets are Purchased on Impulse

What does a typical Sweet snack c-store purchase look like for you?



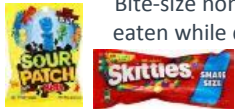
SHOPPERS SEGMENT SWEET SNACKS INTO THREE OCCASION GROUPS

Within These Groups, Sweet Snacks Satisfy Six Specific Shopper Needs

Afternoon Indulgence

Fruity Candy Craving (flat)

Bite-size non-chocolate candy eaten while doing other things



PM Chocolate Indulgence *

Indulgent candy and packaged bakery



Crunchy Chocolatey Nibbling ↑

Mini candies and cookies with a little indulgence, but not too bad for you



Sweet Start Mornings

AM Bakery-Fresh & Wholesome
More real, fruity, some nutrition

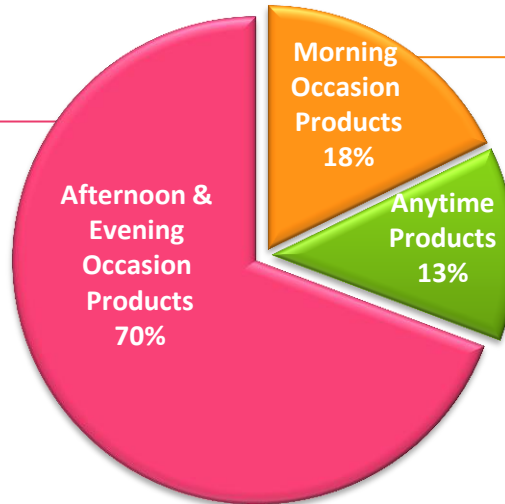


AM Bakery Indulgence
Bakery-fresh, taste-first sweet eaten for enjoyment & on-the-go



Anytime Munching

Anytime Wholesome Goodness
Like homemade, baked, some nutrition, easily portable



% Unit share of Salty Snacks

*↑↓ = Latest Year Unit Growth% (↑ = +1 - 4%, ↓ = -1 - -4%)

ENSURE YOUR SWEET SNACK PORTFOLIO HAS THE RIGHT MIX

For Sweet Start Mornings...

The fresher the better! Shoppers first want to satisfy sweet cravings, and many are also seeking out wholesome options that leave them full and satisfied early in the morning.

For Anytime Munching...

Offer portable sweet treats that shoppers can take and eat on-the-go throughout the day. Aim for cues of 'homemade' and not going overboard on indulgence.

For Afternoon Indulgence...

Don't worry about the health fuss with these shoppers! Offer a variety of chocolate or fruity candies that can satisfy a range of sweet indulgences.

Grab Shoppers' Attention

Displays with appetizing photos, cues of freshness and a variety of products to meet different needs entice the majority of shoppers to purchase sweet snacks on impulse.

