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believe in better®

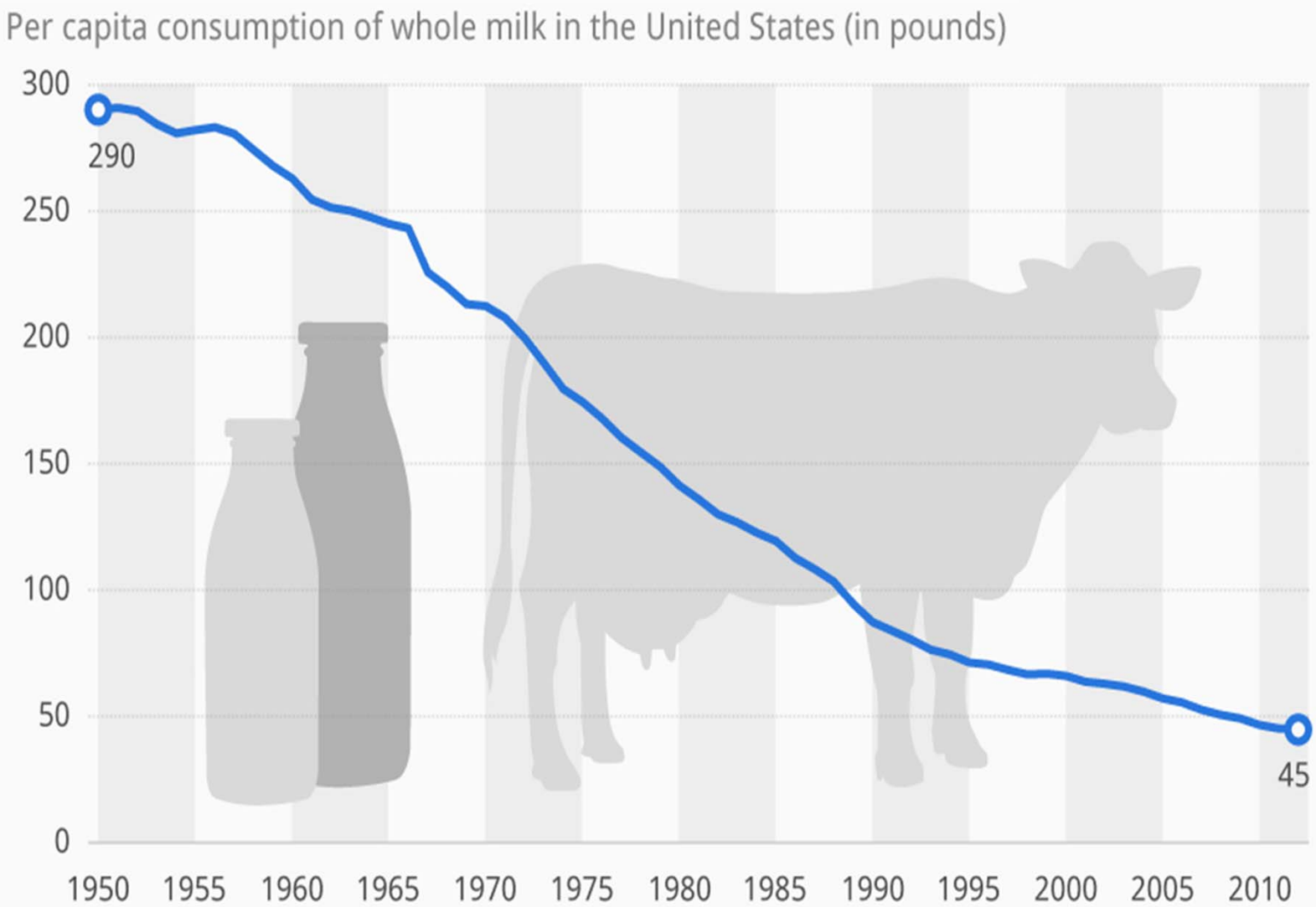
USDA United States Department of Agriculture

AGRICULTURAL OUTLOOK FORUM

Transforming Agriculture

Washington, D.C.

26 February 2016


Per capita consumption of whole milk in the United States (in pounds)
300
250
200
150
100
50
0
290
45
1950
1955
1960
1965
1970
1975
1980
1985
1990
1995
2000
2005
2010

Source USDA

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Brands can
transform
commodities

$1.00

$4.00

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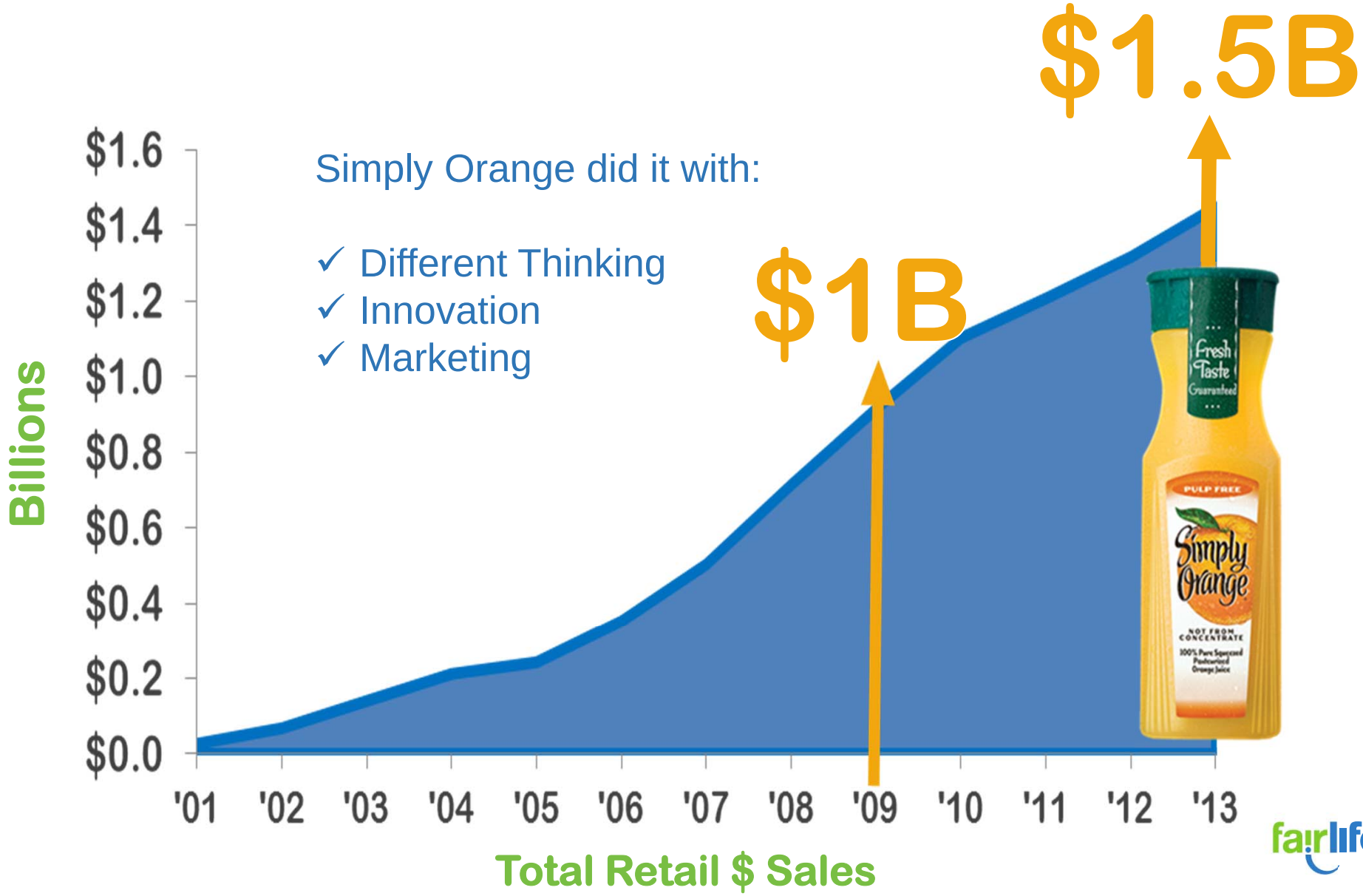
Why we are confident the industry can rebound



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Everything starts with thinking differently

Past – They buy what we make

Today – We make what they ask for

We anticipate what they want

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It’s all about
building
relationships
with
people

People are re-assessing
everything they eat & drink

- ✓ clean label
- ✓ less processing
- ✓ natural ingredients
- ✓ nothing artificial
- ✓ more nutrition
- ✓ great taste
- ✓ sustainability

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provide what she is looking for…

- ✓ Great taste
- ✓ Real pure milk
- ✓ More nutrition

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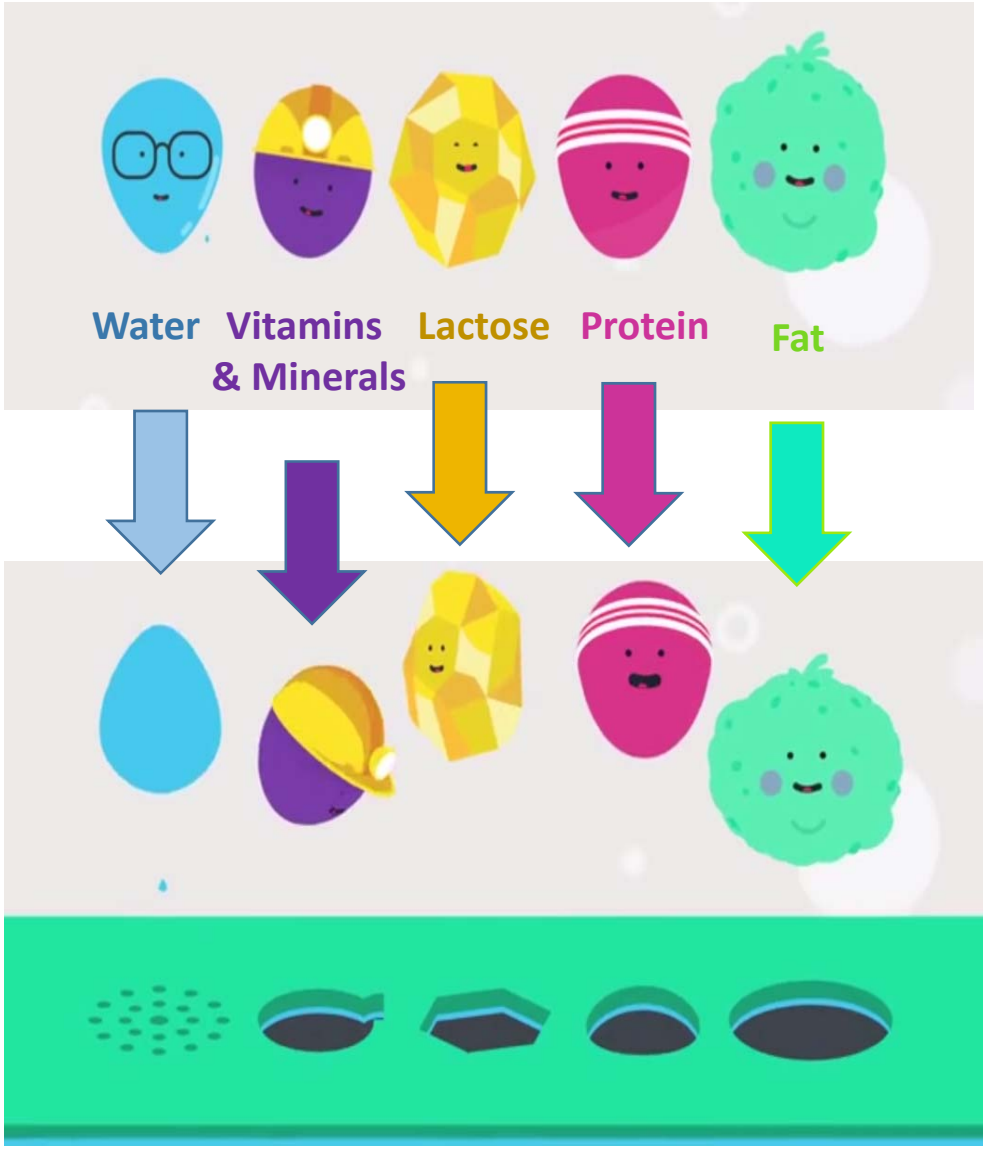
What nutrition is she looking for?

Simple, innovative filtration



- ✓ **Cold filtered milk**
- ✓ **Increases nutrition**
- ✓ **Removes lactose**
- ✓ **Lowers sugar**
- ✓ **Extends freshness**

50% more protein
30% more* calcium
*Compared to ordinary milk.
new!
2%
fairlife
believe in better milk.™
reduced fat
ultra-filtered milk
38% less fat than whole milk
from cows not treated with rBST†
vitamins A & D | ultra-pasteurized
52 FL OZ (1.5L)

Disrupt and Stand Out

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50% more protein
30% more* calcium
*Compared to ordinary milk.
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2%
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2% reduced fat
ultra-filtered milk
38% less fat than whole milk
from cows not treated with rBST†
vitamins A & D | ultra-pasteurized
52 FL OZ (1.5L)

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new!
$2.67

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In-store activation to drive trial

Banners to interrupt

Coupon to incent trial

Co-promote
with popular brands

Sample

Target Almond milk with Catalina

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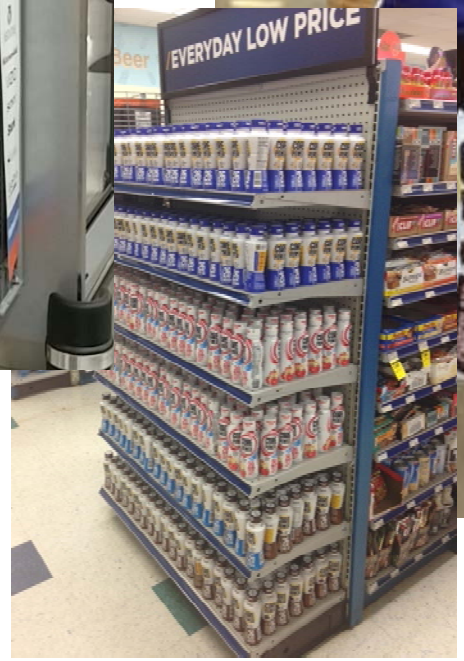
Multiple locations throughout the store



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Expand availability to everywhere people want to enjoy milk

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$20B family nutrition in home

fitness nutrition **$2B**

$2B supplement

snack & weight loss **$1B+**

$1B+ yogurt

breakfast **$1B+**

$1B flavored milk

probiotic **$1B**

$1B smoothies

coffee **$1B**

Over $30B opportunity in the $180B RTD beverage category

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Everyone can do what we do…

- ✓ Start with the highest quality milk we can produce
- ✓ Create a brand dialogue to establish a relationship based on trust and values
- ✓ Provide product benefits that we think they will like
- ✓ Regular dialogue with consumers to understand their needs and attitudes
- ✓ Differentiate and Disrupt at the point of purchase to drive reconsideration and trial
- ✓ Believe in better…learn and change quickly
- ✓ Constant innovation of product benefits

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Skinnygirl Protein
VANILLA CUSTARD SHAKE
Gingerbread Latte
Peppermint Mocha
20g PROTEIN
POWERFUL YOGURT
HORIZON ORGANIC
CHOCOLATE
LIVE REAL FARMS
ENERGY DRINK
milkwise
vanilla
original
FitPRO DAILY
26g REAL MILK PROTEIN
CALIFIA FARMS
CLASSIC CINNAMON
Pure
HORCHATA
WITH ALMONDMILK
PowerBar
PROTEIN SHAKE
argo tea
teapuccino
Kellogg's to go
breakfast
ULIVIAVA
lean
vanilla iced coffee
mocha iced coffee
Vanilla Chai
Delight
Chai Tea
LATTE
PROTEINJAVA
RE FUEL
RICH CHOCOLATE
CHOCOLATE PEANUT BUTTER
Creamy Cappuccino
Vanilla Latte
SkinnyCow
ICED COFFEE
Breakfast ESSENTIALS
GRAB 'n GO!
Protein SMOOTHIE
Strawberry Banana
COLD-BREW
HIGH Brew
COFFEE
Double ESPRESSO
Simply Smart
Lowfat Milk
GREEK SMOOTHIE
TruMoo
Chocolate
Vanilla
Protein Plus
a2
Tea in Five
Matcha latte
LEAN BUILDER
rockin' refuel
PROTEIN MILK BEVERAGE
ICONIC
healthy lifestyle beverage
Organic BALANCE
Protein Shake
Vanilla Bean
Dark Chocolate
QUAKER
Breakfast Shake
BFAST
Special K
Protein Breakfast Shake
COFFEE HOUSE
CHOCOLATE MOCHA
Dairy Pure
Fat Free Milk
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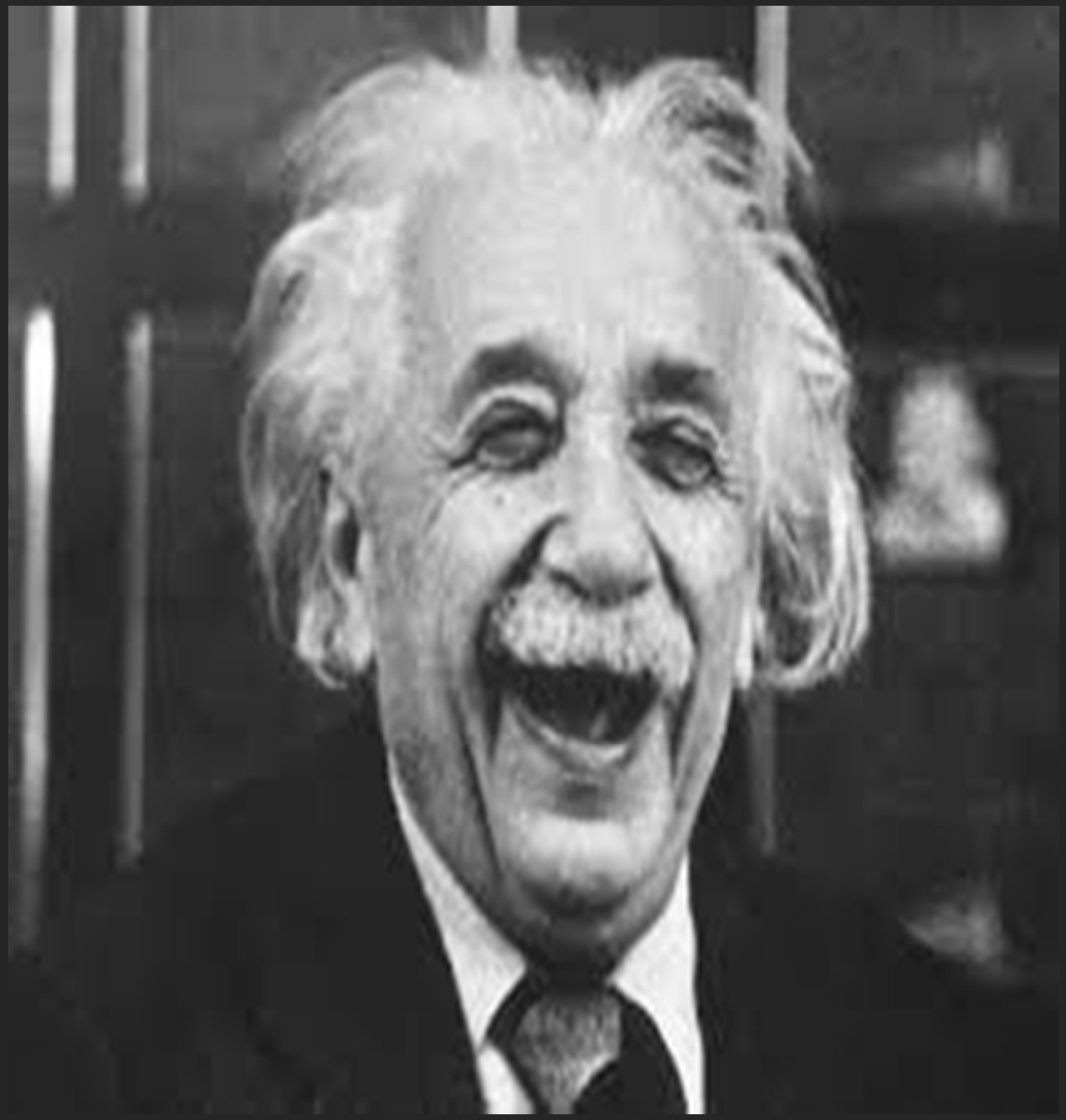
We can't solve problems by using the ***same kind of thinking*** *we used when we created them.*



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Thank you!