

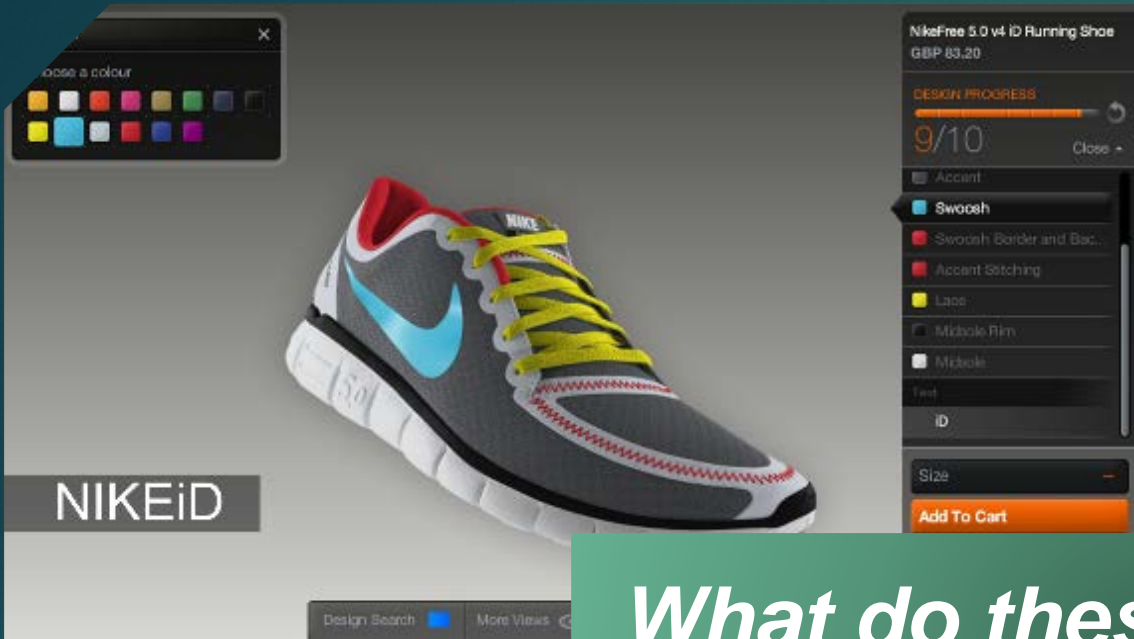
Personalized Nutrition

An Industry Disruptor?

“Let food be thy medicine
and medicine be thy food”

-Hippocrates



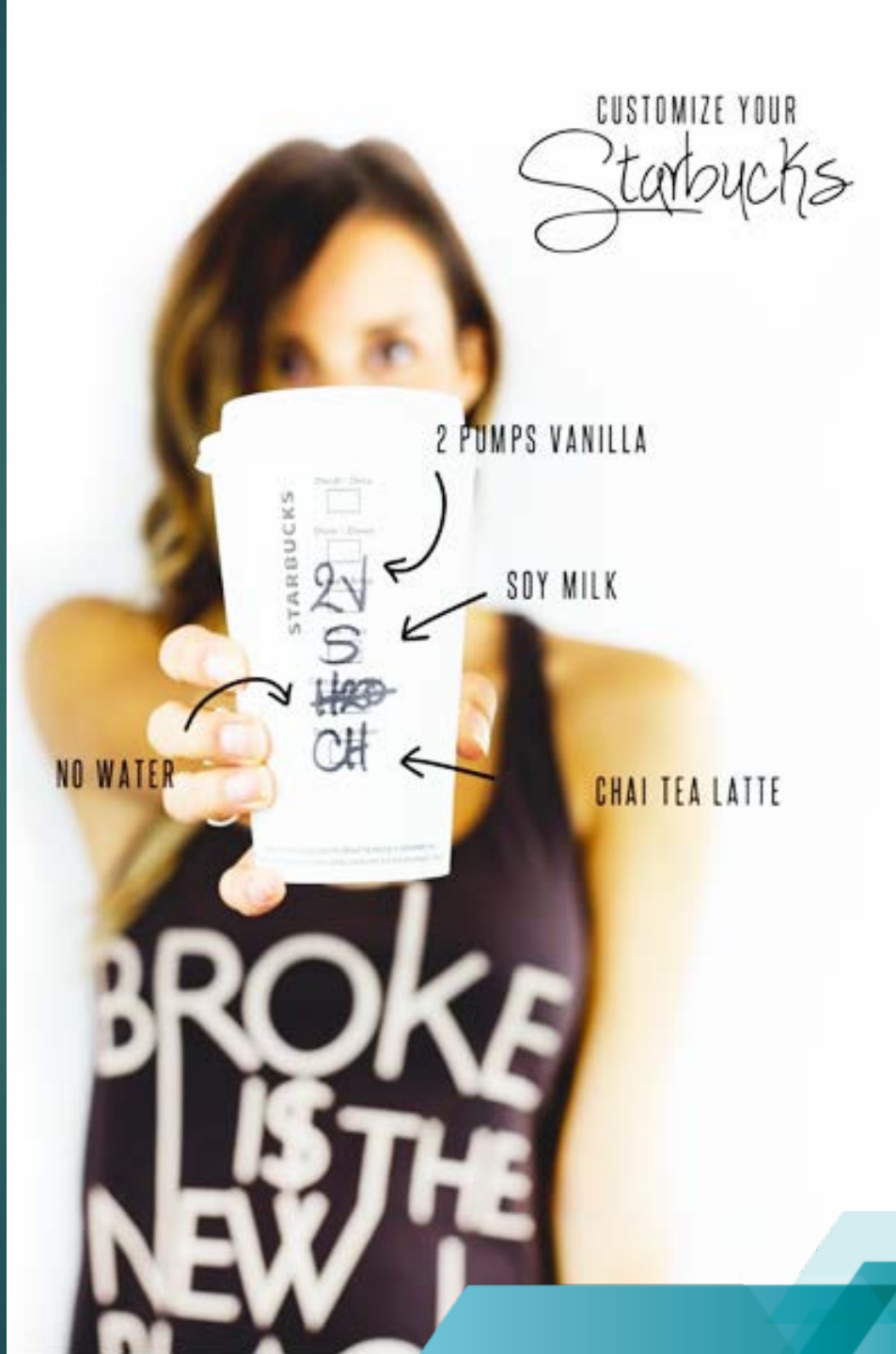


What do these four images have in common?





Consumers seek and demand unprecedented levels of “bespoke” treatment to suit their needs perfectly



Meanwhile, it is becoming increasingly convenient for consumers to track their personal health on a regular basis in and out of the store...



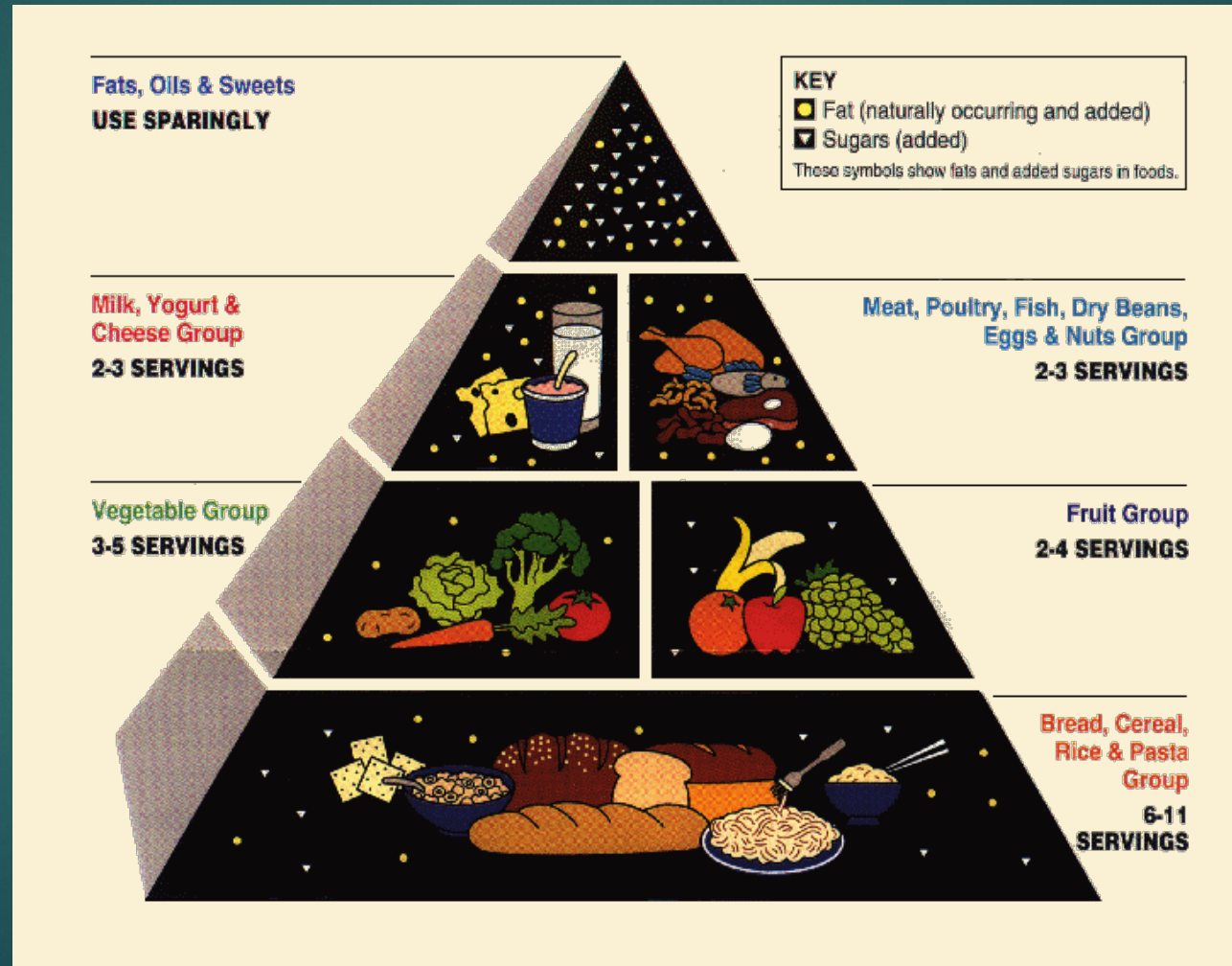


At-home genetic test:

- Ancestry
- Familial Traits
- Health Metrics

And investigate themselves to an unprecedented degree

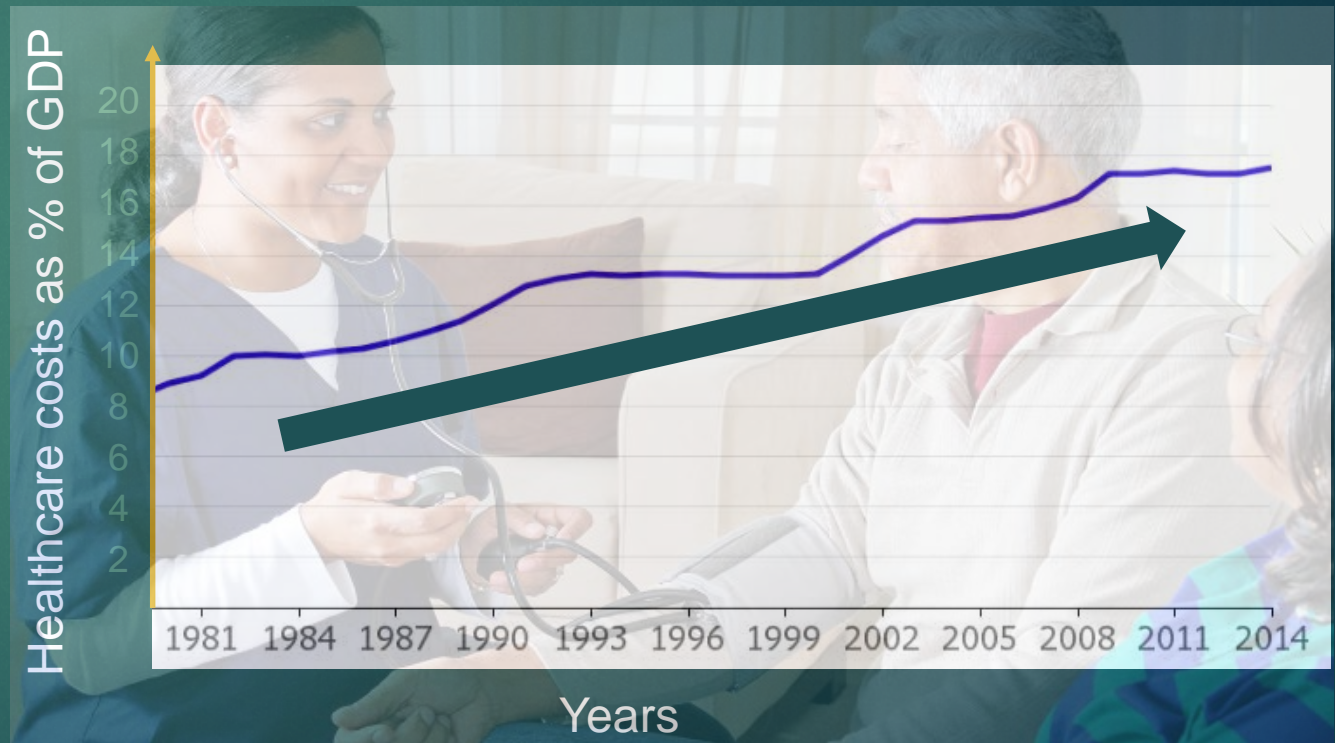
Past nutrition guidelines have focused on “one size fits all” recommendations



Nutrition impacts health; 'wrong' nutrition is driving healthcare costs in developed countries



US Healthcare costs have been increasing rapidly since the last 3 decades





Increasingly,
consumers are
learning about
specific foods to
“treat” specific health
concerns



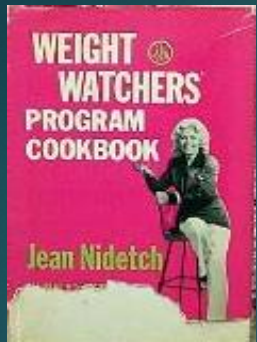
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CANCER-FIGHTING FOODS

You Should Eat Every Day



The food industry has expanded its focus from avoiding negatives to adding positive benefits...



1950-1970

Weight



1970-1995

Weight and
Heart Health



1995-2005

Weight
Heart Health
Purity



2005-2015

Weight
Heart Health
Purity
Digestive Health
Disease
Management



2015 -

Weight
Heart Health
Purity Digestive
Health Energy /
Performance
Disease Prevention

Now lets look at proteins...protein has shifted to the forefront in the nutritional world



And while there is an increasing variety of products on the meat shelf....



Do we really respond to our consumers' specific needs?



Nutrition is directly linked to health and consumers are becoming aware

Consumers are tracking themselves more than ever...

...and expect the perfect fit, specifically for them

yet nutrition including proteins are offered as a “one-size-fits-all” system.



How to respond to these new expectations



It's time to
personalize nutrition

Personalization responds to the whole person

- Age
- Gender
- Genetics
- Diseases
- Environment
- Behaviors
- Emotions



Scientific advancements enable personalization



Diagnostic and Monitoring Tools

enable collection data for use in personalized nutrition algorithms



Nutrigenomics

enables analyzing phenotypic, genotypic, environmental, and behavioral data to understand nutritional needs



Digital Capabilities

improve connectivity and communication between personalized nutrition providers and consumers



Modifying Food

to achieve target nutritional profiles possible through advancements in nutraceuticals and bio-fortification in food manufacturing

Food Products Can Cater to Personal Priorities

Different lifestyle approaches to health & wellness...

may lead to different personal nutrition needs and wants...

...and different solutions

Being Physically Fit / Energy for Active Lifestyle



Digestive Health
Energy / Fuel
Muscle Building
Performance

Feeling Good About Myself



Weight Control
Hunger Control
Skin / Beauty
Anti-Aging

Leading a Balanced Lifestyle



Purity
Digestive Health
Stress Reduction
Sleep Enhancement

Not Being Ill



Heart Health
Disease Prevention
Allergen Free
Immunity Building



Key players are making big bets in personalized nutrition ventures

Nestlé Health Sciences / Press releases

NESTLÉ AND SAMSUNG TO COLLABORATE ON DIGITAL NUTRITION AND HEALTH

29 July 2016

Nestlé and Samsung are announcing a research collaboration to explore the potential of nutrition science and digital sensor technologies to provide new insights into healthy living.

They are developing a new digital health platform to provide individuals with more lifestyle and fitness than previously possible.

Their aim is to empower people to better manage their health and wellness using platforms and devices.

The initial work on the platform will be carried out by the Nestlé Institute of Health and the Samsung Strategy and Innovation Centre (SSIC), headquartered in Silicon Valley.

The long-term goal of the collaboration is to combine 'Internet of Things' technologies (which connect with each other) with breakthrough nutrition science, to provide people with



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TYSON FOODS CREATES VENTURE FUND TO FUEL THE FUTURE OF FOOD

12/05/16

Download this Press Release (PDF)

SPRINGDALE, Ark., Dec. 05, 2016 (GLOBE NEWSWIRE) -- As part of its commitment to innovation and growth, Tyson Foods, Inc. (NYSE:TSN) has launched a venture capital fund focused on investing in companies developing breakthrough technologies, business models and products to sustainably feed a growing world population.

Tyson will make available \$150 million to the fund, which has been named Tyson New Ventures LLC, to complement the company's continuing investments in innovation in its core fresh meats, poultry and prepared foods businesses.

INDUSTRY NEWS > FOOD & LIFESTYLE

Campbell's investing \$32M in San Francisco launch in 2017

October 12, 2016 12:32pm EDT

INDUSTRIES & TAGS Food & Lifestyle, Consumer Goods

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Kenneth Hilario

Reporter
Philadelphia
Business Journal



Campbell's Soup Co. has become the sole investor of a San Francisco-based company that combines nutrition, technology and food delivery into one bundle.

The Camden-based food company is investing \$32 million in Habit, a personalized nutrition company that will launch in 2017.

1 Reclaim the protein story



#2 Leverage meat's nutritional advantages as a complete protein

Minimal Requirements for All Essential Amino Acids



85% Lean Ground Beef



>4 cups Soy Milk



>5 Hard Boiled Eggs



>18 cups Chickpeas

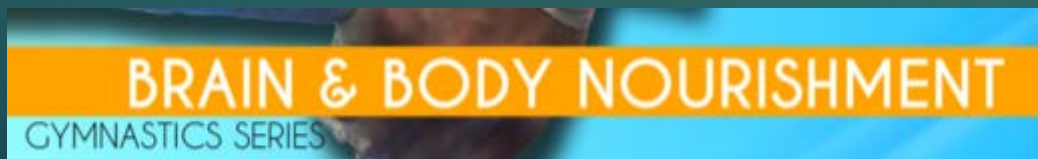


>25 Slices Wheat Bread

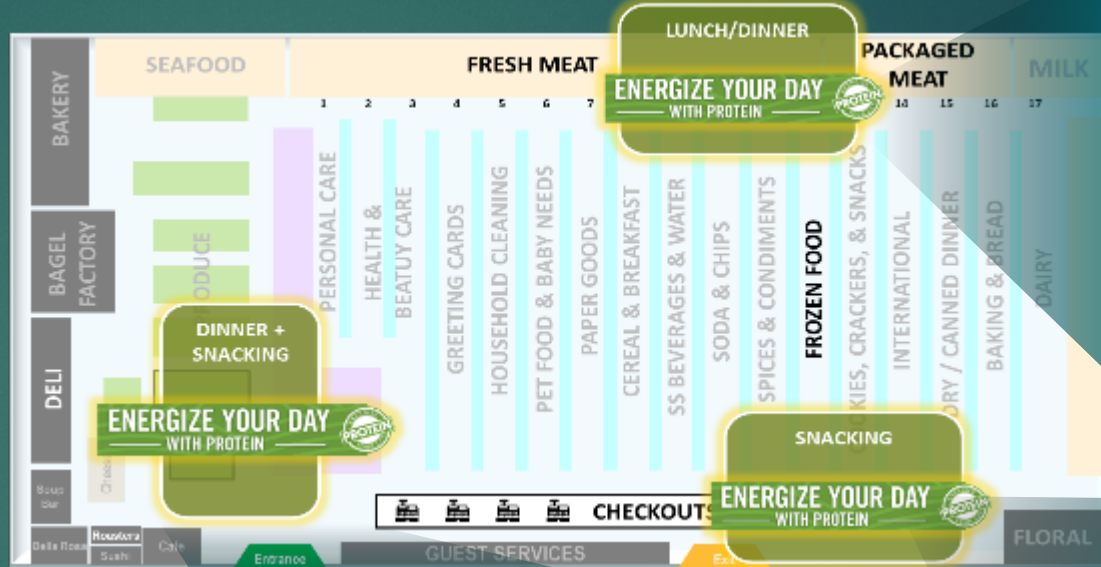


50 Tbsp. Peanut Butter

#3 Tailor benefits to personal health needs



4 Make it easy for consumers to engage



#5 Collaboration across industries to drive true value for consumers



6 million+
members
worldwide

\$100 million+
worth of healthy food
purchased through
Vitality

70,000+
gym visits logged
per day



EATING HEALTHILY?

Test it on the food tracker and stock up on Vitality points.

All Vitality members get up to

25% CASH BACK

on HealthyFood at Pick n Pay or Woolworths. DiscoveryCard holders get up to 25% cash back at both.

A promotional graphic for Discovery Vitality. It features a photograph of a smiling woman with dark hair holding a red apple. To the right of the photo, the text reads "EATING HEALTHILY?" in large, colorful letters. Below this, it says "Test it on the food tracker and stock up on Vitality points." and "All Vitality members get up to 25% CASH BACK" in large, colorful letters. At the bottom, it specifies "on HealthyFood at Pick n Pay or Woolworths. DiscoveryCard holders get up to 25% cash back at both."

1-. Changed aisle positioning:
From meat to protein and health
benefits.

2-. Incorporation of
menu finder.

3-. Shelf labeling and bar
code scanning, that will
enable real time tracking
of nutrients.

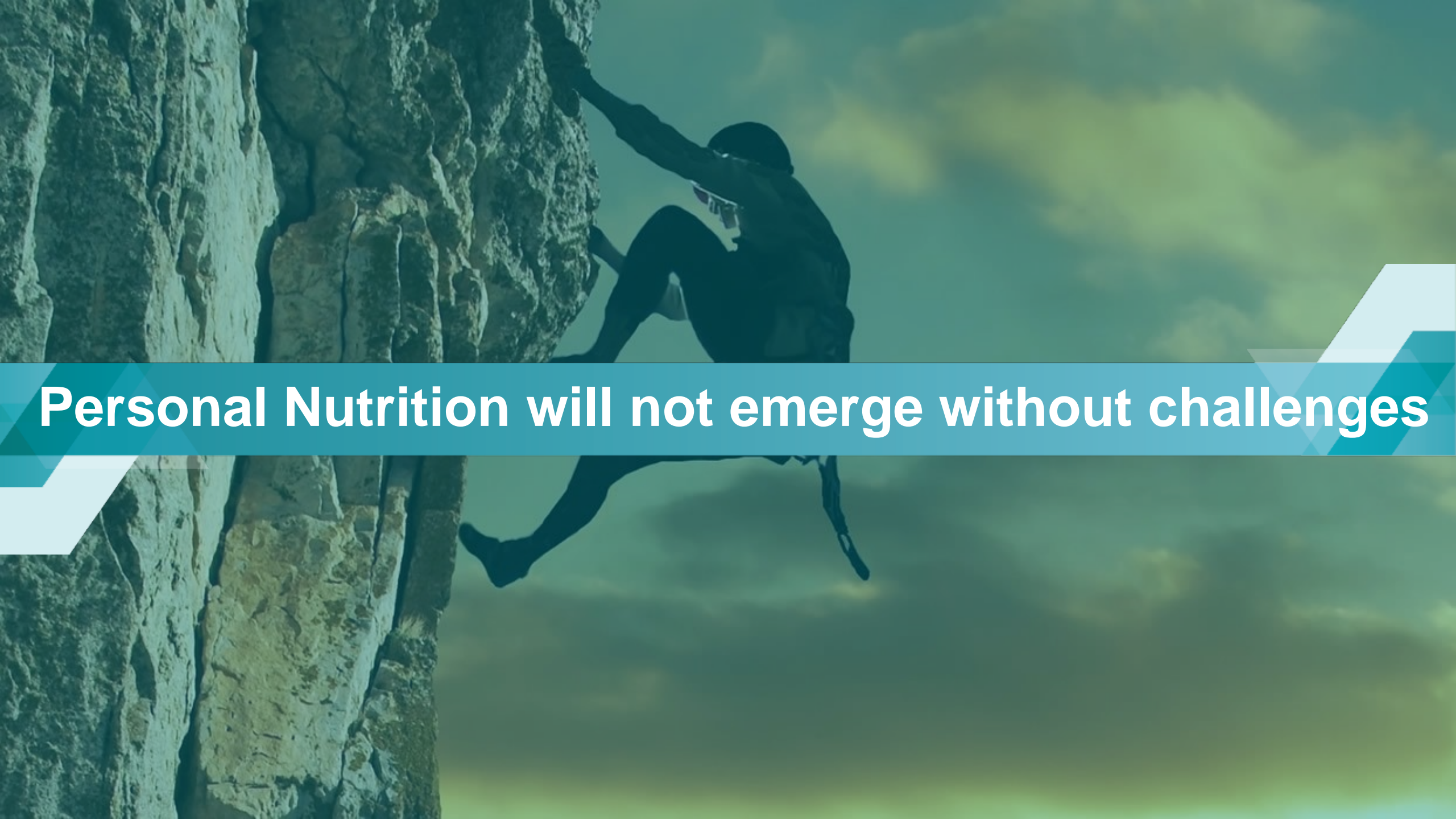
4-. Portion sizing - Meat
Cuts / Portion sizing now
tailored to individuals.

5-. Linkage to loyalty pro-
grams and health and
wellness.

6-. Ready access to
protein nutritional informa-
tion through digital
banners.



Imagine if you were standing in a grocery store meat aisle 5 years from now. . .



Personal Nutrition will not emerge without challenges

Those investing in personalized nutrition are developing a powerful competitive advantage

Accelerating Near-Term Growth



- Feeding immediate consumer appetite for **personalization and health**
- **Differentiating** amongst the “noise” of new offerings
- Testing new sales channels – **direct to consumer**

Positioning for Future of Food and Health



- Knowing the consumer – as **individuals vs. segments**
- Preparing for **convergence of food and health**
- Developing brand equity for **innovation**
- Building **proprietary science**

In summary, three takeaways

- 1 | Personalized nutrition will take root, disrupt the industry, and serve the masses
- 2 | Food and Health will increasingly converge, in industry and for consumers
- 3 | Companies who take action now will lead the future of food (and health)



Let's continue the conversation

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