MEETING THE GROWING NEED FOR SUPPLEMENTAL VITAMIN D
WITH A ‘WHOLE FOOD’, CLEAN LABEL SOLUTION
A ‘WHOLE FOODS NUTRITION’ TREND

Consumers increasingly want their nutrition from whole foods – natural, minimally-processed, understandable sources

- **Sixty percent** of consumers strongly like the idea of getting their nutrition from foods with **naturally occurring health benefits** vs 21% who like the idea of getting it from fortified products (IFIC, 2013b).

- About one-third of moms are making a strong effort to increase **fresh/unprocessed foods, Vitamins/minerals**, whole grains, and calcium in their child's diet; **one in three is making that effort with respect to Vitamins D and C and dietary fiber**… (MSI, 2012d)

- In 2012, the **biggest gainers** in U.S. supplement sales were **food-based**. Whole food supplements $1.2 billion +12%. (NBJ, 2013a).

‘Whole Food Nutrition’ is the *end-point* of the clean label movement.
GROWING AWARENESS OF THE “NEED FOR D”

A shockingly high shortfall of this important nutrient

US GOVERNMENT IS INVOLVED

- In the United States, NHANES study from 2005 to 2008 indicated that 94% of U.S. adults are not consuming adequate amounts of Vitamin D
- Increases in Vitamin D requirements considered by many scientific bodies (IOM, Vitamin D Council, Vitamin D Foundation)
- Vitamin D becomes an important part of new labeling requirements by FDA

Dietary Guidelines from USDA classify Vitamin D as a ‘shortfall’ nutrient
GROWING AWARENESS OF THE “NEED FOR D”
Consumers are starting to get it – but it’s just beginning

THE CONSUMING PUBLIC

Consumers say they are trying to get more of:

<table>
<thead>
<tr>
<th>Vitamin</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vitamin D</td>
<td>43%</td>
</tr>
<tr>
<td>Calcium</td>
<td>42%</td>
</tr>
<tr>
<td>Vitamin C</td>
<td>40%</td>
</tr>
<tr>
<td>B Vitamins</td>
<td>34%</td>
</tr>
<tr>
<td>antioxidants</td>
<td>26%</td>
</tr>
<tr>
<td>Vitamin E</td>
<td>25%</td>
</tr>
<tr>
<td>Vitamin A</td>
<td>24%</td>
</tr>
<tr>
<td>Iron</td>
<td>21%</td>
</tr>
<tr>
<td>Vitamin K</td>
<td>13%</td>
</tr>
</tbody>
</table>

(MSI, 2012a)

A CONVERGENCE OF RECOMMENDERS

- US Government
- Nutrition community
- Their doctors
- The media
- Each other
WHO IS LIKELY TO NEED MORE VITAMIN D

A very broad cross-section of the population

- People with **darker skin**
- People who spend a lot of **time indoors** during the day
- People who **cover their skin** all of the time (sunscreen)
- People that live in the **Northern United States** or **Canada**
- **Older people** have thinner skin than younger people and may not produce as much Vitamin D
- **Infants** that are breastfed and aren’t given a Vitamin D supplement
- **Pregnant women**

Pretty much everybody…
AT THE SAME TIME....

Major consumer brands are being reformulated to remove Vitamin D because of natural & non-GMO labeling concerns

COMPETING TRENDS IN THE MARKETPLACE!
EARTHLIGHT WHOLE FOOD VITAMIN D REVIEW

Topline of what we think you want to know

A NATURAL, NON-GMO, VEGAN-FRIENDLY FORM OF VITAMIN D

- **40,000 IU** of Vitamin D per gram – independently verified
- 2 years shelf life stability; reproducible nutrient composition
- Low use levels and **excellent economics**
- Little to **no impact** on the organoleptic properties of foods
- Little to **no impact** on the food manufacturing process
- NO regulatory hurdles
- Non-GMO
- **GRAS** (21 CFR 184, 1950 and 179.41) – milk, milk products, breakfast cereal, grain products and pasta, margarine
- USDA GAP and GHP
- Kosher & Halal
- Made in the USA
- Labeling: “Vitamin D from mushroom powder” or “mushroom Vitamin D”

### Claim | Amount
--- | ---
Good source (10%DV) | 1 mg
Excellent source (20%DV) | 2 mg
High potency (20%DV) | 2 mg
100% DV | 10 mg
EARTHLIGHT WHOLE FOOD VITAMIN D

An ingredient solution that ‘checks the boxes’ for product development

- Whole food
- Minimally-processed
- High nutrient content
- Clean label
- Vegan
- Non-GMO
- Excellent economics

When you are concerned about working with animal-based sources of Vitamin D or highly processed extracts that might not be considered wholesome – Earthlight meets the need.
WHERE WOULD YOU RATHER SOURCE YOUR ‘D’??

Whole foods resonate better with consumers…

OR

Wool
Lichen
Liver
Yeast
EARTHLIGHT WHOLE FOOD VITAMIN D

The elements of a real solution...

A CONVERGENCE OF OPPORTUNITY
- Consumer need
- Market awareness
- Emerging requirements
- Cost-effectiveness

Nutrient Shortfall

Consumer Awareness

Truly Natural

Non-Animal

Clean Label

WHOLE FOOD!
AN ECONOMICAL, CLEAN-LABEL SOURCE OF VITAMIN D

ANY QUESTIONS???