



**AN
ECONOMICAL,
CLEAN-LABEL
SOURCE OF
VITAMIN D**



**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

Proposed label

| Nutrition Facts | |
|---------------------------------|-------------------------|
| 8 servings per container | |
| Serving size | 2/3 cup (55g) |
| Amount per 2/3 cup | |
| Calories | 230 |
| % DV* | |
| 12% | Total Fat 8g |
| 5% | Saturated Fat 1g |
| | Trans Fat 0g |
| 0% | Cholesterol 0mg |
| 7% | Sodium 160mg |
| 12% | Total Carbs 37g |
| 14% | Dietary Fiber 4g |
| | Sugars 1g |
| | Added Sugars 0g |
| | Protein 3g |
| 10% | Vitamin D 2mcg |
| 20% | Calcium 260mg |
| 45% | Iron 8mg |
| 5% | Potassium 235mg |

* Footnote on Daily Values (DV) and calories reference to be inserted here.

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: | |
|---|------------|
| Vitamin D | 43% |
| Calcium | 42% |
| Vitamin C | 40% |
| B Vitamins | 34% |
| antioxidants | 26% |
| Vitamin E | 25% |
| Vitamin A | 24% |
| Iron | 21% |
| Vitamin K | 13% |

(MSI, 2012a)

A CONVERGENCE OF RECOMMENDERS

- US Government
- Nutrition community
- Their doctors
- The media
- Each other



GROWTH THROUGH INNOVATION

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

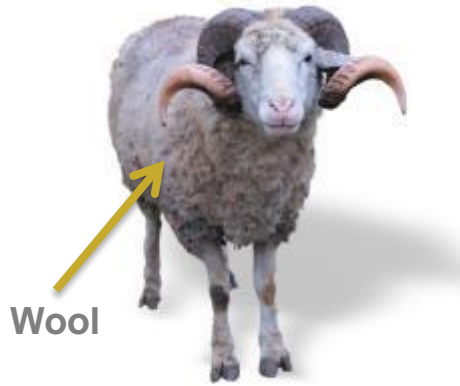
Non-GMO

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...

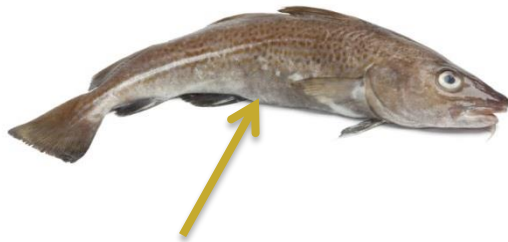


Wool



Lichen

OR



Liver

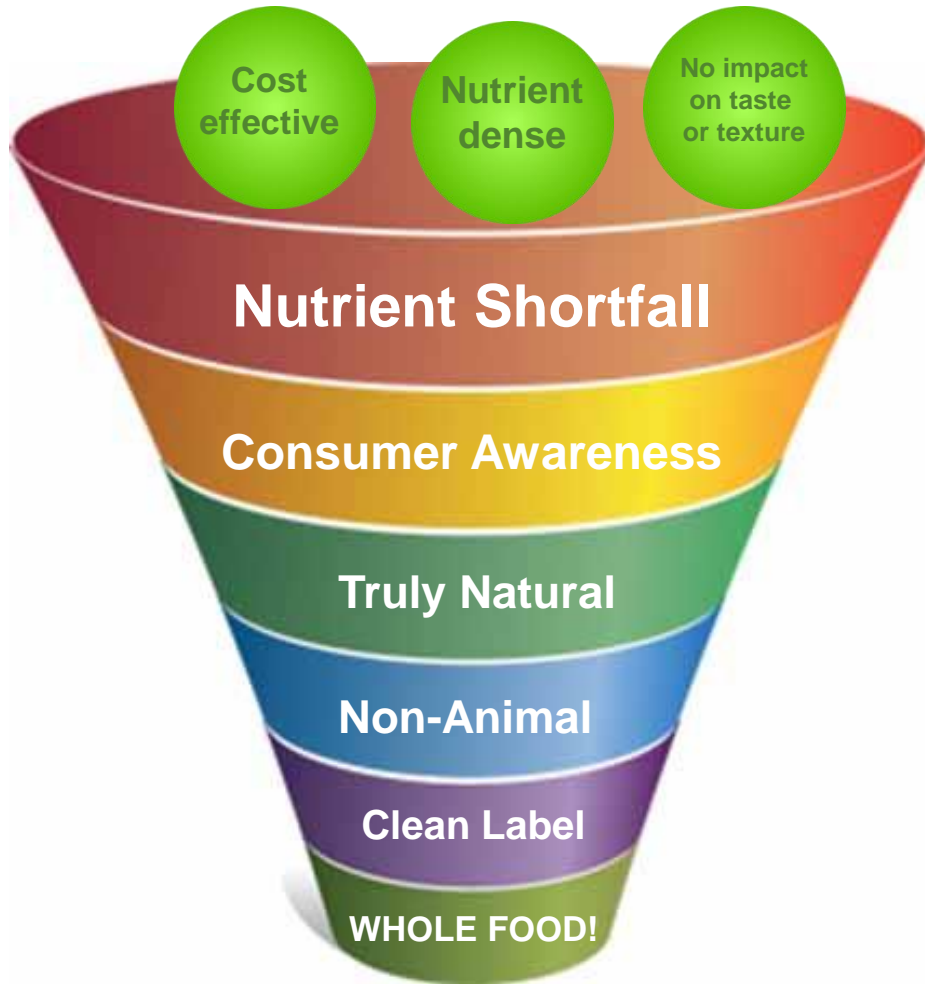


Yeast



EARTHLIGHT WHOLE FOOD VITAMIN D

The elements of a real solution...



A CONVERGENCE OF OPPORTUNITY

- Consumer need
- Market awareness
- Emerging requirements
- Cost-effectiveness



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ANY QUESTIONS???