

ACROSS BRANDS, SODA CONSUMERS AVOID TOTAL SUGARS MORE THAN SPECIFIC TYPES

COCA-COLA, PEPSI, DR PEPPER BUYERS STUDIED IN RECENT MINTEL RESEARCH

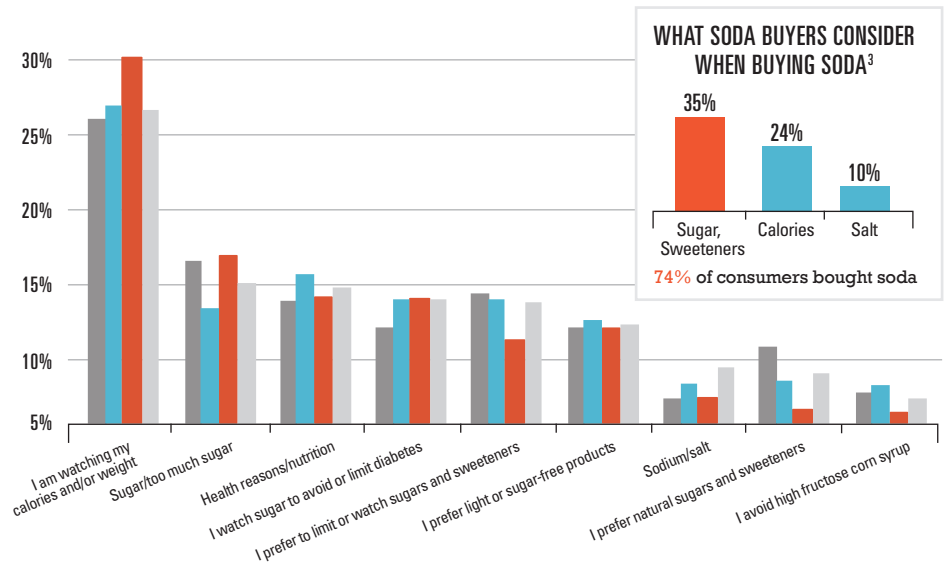
According to Mintel, approximately one-fifth of Coca-Cola, Pepsi and Dr Pepper drinkers (between 18 and 20 percent) say they are looking to reduce total sugars in their diet. In contrast, a nominal 1 to 2 percent of these brand consumers cite avoiding a specific sweetener, such as high fructose corn syrup (HFCS).

FOOD, BEVERAGES AND INGREDIENTS THAT SODA BUYERS ARE AVOIDING (UNAIDED)¹

BRANDS	pepsi	Coca-Cola	Dr Pepper	TOTAL
SUGAR	20%	18%	19%	21%
FATS/OILS	19%	17%	17%	17%
SALT/SODIUM	8%	9%	7%	10%
SODAS	8%	8%	8%	8%
CARBS	6%	5%	8%	5%
HFCS (NET)	2%	2%	1%	3%

1. Q3. In the last six months, have there been any particular foods, beverages, or specific ingredients that you and your family are trying to consume less of or avoid? Base: n=2,400 total; n=1,007 Coca-Cola; n=938 Pepsi; n=848 Dr Pepper 2. Q12_02. You said that you consider calories, salt/sodium, sugar or other sweeteners when buying sodas Oct. 2012 Base n=500 Coca-Cola; n=489 Pepsi; 410 Dr Pepper 3. Q11_02. When you buy...do you consider calories, sugar or other sweeteners, or salt/sodium when buying? Sodas Oct. 2012 Base n=1,767 COCA-COLA® and logo are registered trademarks of The Coca-Cola Company. DR PEPPER® and logo are registered trademarks of Dr Pepper/Seven Up, Inc. PEPSI® and logo are registered trademarks of PepsiCo.

"WHY DO YOU CONSIDER CALORIES, SALT/SODIUM, SUGAR/SWEETENERS WHEN BUYING SODAS?" (UNAIDED)²



Of the one-third of soda buyers who say they consider total sugars when making purchase decisions, three of the top five reasons cited for considering sugar when buying soda were health related, including managing calories/weight, nutrition or to limit/avoid diabetes rather than HFCS.

In total, Mintel Research Consultancy studied consumer attitudes and behavior toward 34 brands in the 13 highest-volume food and beverage categories. Findings align with previous Mintel research examining consumer attitudes and behaviors toward ingredients in food and beverage products broadly (2011) and at the category level (May 2012).

SURVEY METHODOLOGY

Commissioned by the Corn Refiners Association in October 2012, Mintel Research Consultancy performed a 13-question telephone survey with 2,400 primary household grocery shoppers. Unaided questions delivered unprompted, top-of-mind opinions and statements to capture truest consumer attitudes and most likely behaviors. Unaided questions were also used to allow for additional probing of key topics.

ABOUT MINTEL RESEARCH CONSULTANCY:

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ACROSS BRANDS, YOGURT CONSUMERS AVOID TOTAL SUGARS MORE THAN SPECIFIC TYPES

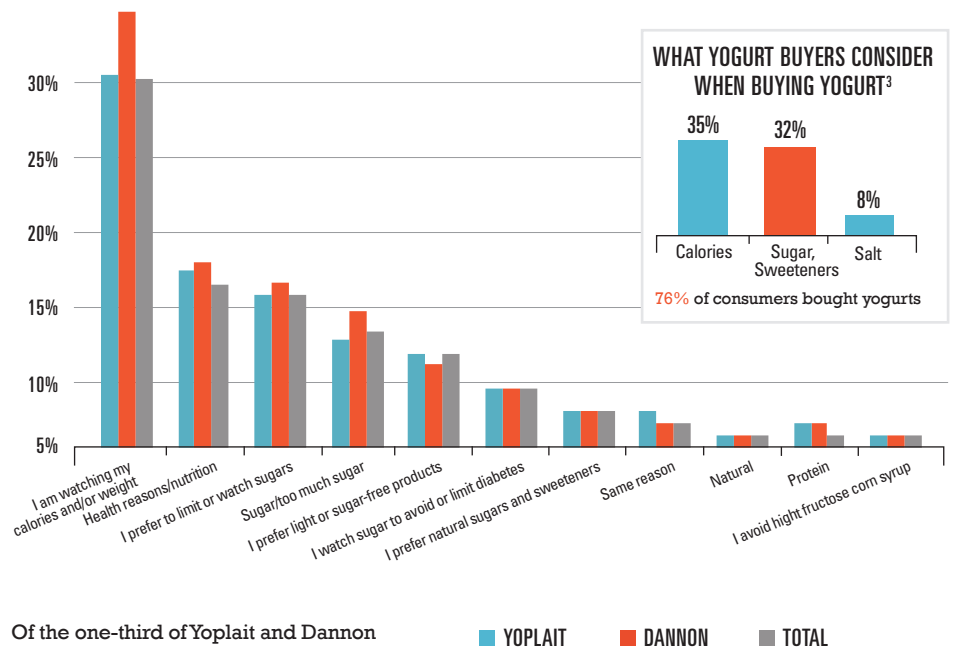
YOPLAIT, DANNON BUYERS STUDIED IN RECENT MINTEL RESEARCH

According to Mintel, approximately one-fifth of Yoplait and Dannon purchasers (between 21 and 22 percent) say they are looking to reduce total sugars in their diet. In contrast, a nominal 2 percent of these brand consumers cite avoiding a specific sweetener, such as high fructose corn syrup (HFCS).

FOODS, BEVERAGES AND INGREDIENTS THAT YOGURT CONSUMERS ARE AVOIDING (UNAIDED)¹

BRANDS	Yoplait	DANONE	TOTAL
SUGAR	21%	22%	21%
FATS/OILS	18%	19%	17%
SALT/SODIUM	11%	10%	10%
SODAS	10%	9%	8%
CARBS	5%	5%	5%
HFCS (NET)	2%	2%	3%

"WHY DO YOU CONSIDER CALORIES, SALT/SODIUM, SUGAR/SWEETENERS WHEN BUYING YOGURT?" (UNAIDED)²



Of the one-third of Yoplait and Dannon buyers who consider sugar when making purchase decisions, reasons cited were related to health and nutrition rather than HFCS.

In total, Mintel Research Consultancy studied consumer attitudes and behavior toward 34 brands in the 13 highest-volume food and beverage categories. Findings align with previous Mintel research examining consumer attitudes and behaviors toward ingredients in food and beverage products broadly (2011) and at the category level (May 2012).

SURVEY METHODOLOGY

Commissioned by the Corn Refiners Association in October 2012, Mintel Research Consultancy performed a 13-question telephone survey with 2,400 primary household grocery shoppers. Unaided questions delivered unprompted, top-of-mind opinions and statements to capture truest consumer attitudes and most likely behaviors. Unaided questions were also used to allow for additional probing of key topics.

1. Q3. In the last six months, have there been any particular foods, beverages, or specific ingredients that you and your family are trying to consume less of or avoid? Base: n=2,400 total; n=1,282 Yoplait; n=860 Dannon 2. Q12_06. You said that you consider calories, salt/sodium, sugar or other sweeteners when buying yogurt Oct. 2012 Base n=1,046 3. Q11_06. When you buy...do you consider calories, sugar or other sweeteners, or salt/sodium when buying? Yogurt Oct. 2012 Base n=1,830 DANNON® and logo are registered trademarks of The Dannon Company. YOPLAIT® is a registered trademark of YOPLAIT MARQUES (France) used under license.

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ACROSS BRANDS, BREAD CONSUMERS AVOID TOTAL SUGARS MORE THAN SPECIFIC TYPES

SARA LEE, WONDER, NATURE'S OWN, ARNOLD, OROWEAT, EARTHGRAINS BUYERS STUDIED IN RECENT MINTEL RESEARCH

According to Mintel, bread buyers, on average, say they are looking to reduce total sugars in their diet at a significantly higher rate than they avoid high fructose corn syrup (HFCS).

Of the one-fifth of bread consumers who consider sugar when making purchase decisions, the top motivators are related to weight management, health and nutrition rather than HFCS.

In total, Mintel Research Consultancy studied consumer attitudes and behavior toward 34 brands in the 13 highest-volume food and beverage categories. Findings align with previous Mintel research examining consumer attitudes and behaviors toward ingredients in food and beverage products broadly (2011) and at the category level (May 2012).

SURVEY METHODOLOGY

Commissioned by the Corn Refiners Association in October 2012, Mintel Research Consultancy performed a 13-question telephone survey with 2,400 primary household grocery shoppers. Unaided questions delivered unprompted, top-of-mind opinions and statements to capture truest consumer attitudes and most likely behaviors. Unaided questions were also used to allow for additional probing of key topics.

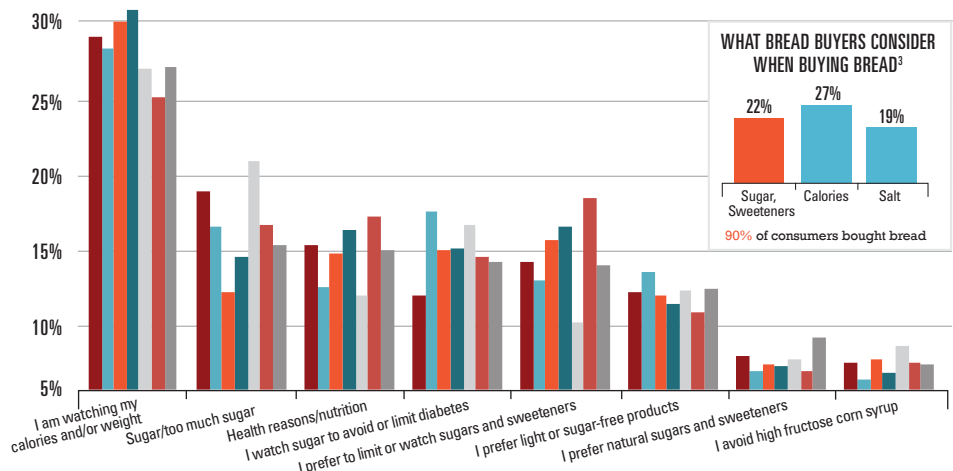
■ SARA LEE ■ WONDER ■ NATURE'S OWN
 ■ ARNOLD ■ OROWEAT ■ EARTHGRAINS
 ■ TOTAL

1. Q3. In the last six months, have there been any particular foods, beverages, or specific ingredients that you and your family are trying to consume less of or avoid? Base: n=2,400 total; n= 748 Sara Lee, n= 574 Wonder, n= 816 Nature's Own, n=322 Arnold, n= 593 Oroweat, n=586 Earthgrains 2. Q12. 02. You said that you consider calories, salt/sodium, sugar or other sweeteners when buying bread Oct. 2012 Base n = 998 total; n=341 Sara Lee; n=262 Wonder; n=335 Nature's Own; n=128 Arnold; n=221 Oroweat; n=234 Earthgrains 3. Q11. 02. When you buy ... do you consider calories, sugar or other sweeteners, or salt/sodium when buying? Fresh packaged bread Oct. 2012 Base n= 2,167 ARNOLD® PREMIUM BREADS and logo are registered trademarks of Bimbo Bakeries USA, Inc. EARTHGRAINS® and logo are registered trademarks of Earthgrains Baking Company. NATURE'S OWN® and logo are registered trademarks of Flowers Foods. OROWEAT® and logo are registered trademarks of Flowers Foods. OROWEAT® and logo are registered trademarks of Bimbo Bakeries USA, Inc. SARA LEE® and logo are registered trademarks of Sara Lee™ Holdings used under license. WONDER® and logo are registered trademarks of Weston Bakeries Limited.

FOODS, BEVERAGES AND INGREDIENTS THAT BREAD CONSUMERS ARE AVOIDING (UNAIDED)¹

BRANDS	Sara Lee	WONDER	Nature's Own	ARNOLD	OROWEAT	EARTHGRAINS	TOTAL
SUGAR	17%	17%	26%	25%	22%	25%	21%
FATS/OILS	15%	18%	19%	15%	21%	17%	17%
SALT/SODIUM	9%	8%	12%	14%	10%	11%	10%
SODAS	11%	9%	10%	7%	8%	14%	8%
CARBOHYDRATES	4%	4%	4%	4%	4%	5%	5%
HFCS (NET)	1%	0%	5%	3%	5%	3%	3%

"WHY DO YOU CONSIDER CALORIES, SALT/SODIUM, SUGAR/SWEETENERS WHEN BUYING BREAD?" (UNAIDED)²



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