

Stonyfield Began in the 1970's as an Organic Farming School Before We Were Producing Yogurt



This is Where Our Organic Obsession Took Root



U.S Organic Industry Growth

- 2000 - \$5.1 Billion
- 2017 – \$49.4 Billion
- CAGR – 14%

Source: US Organic Trade Association 2018 Consumer Insights



INSIGHTS

TOPS OF 2018: ORGANIC

FMCG AND RETAIL | 12-19-2018



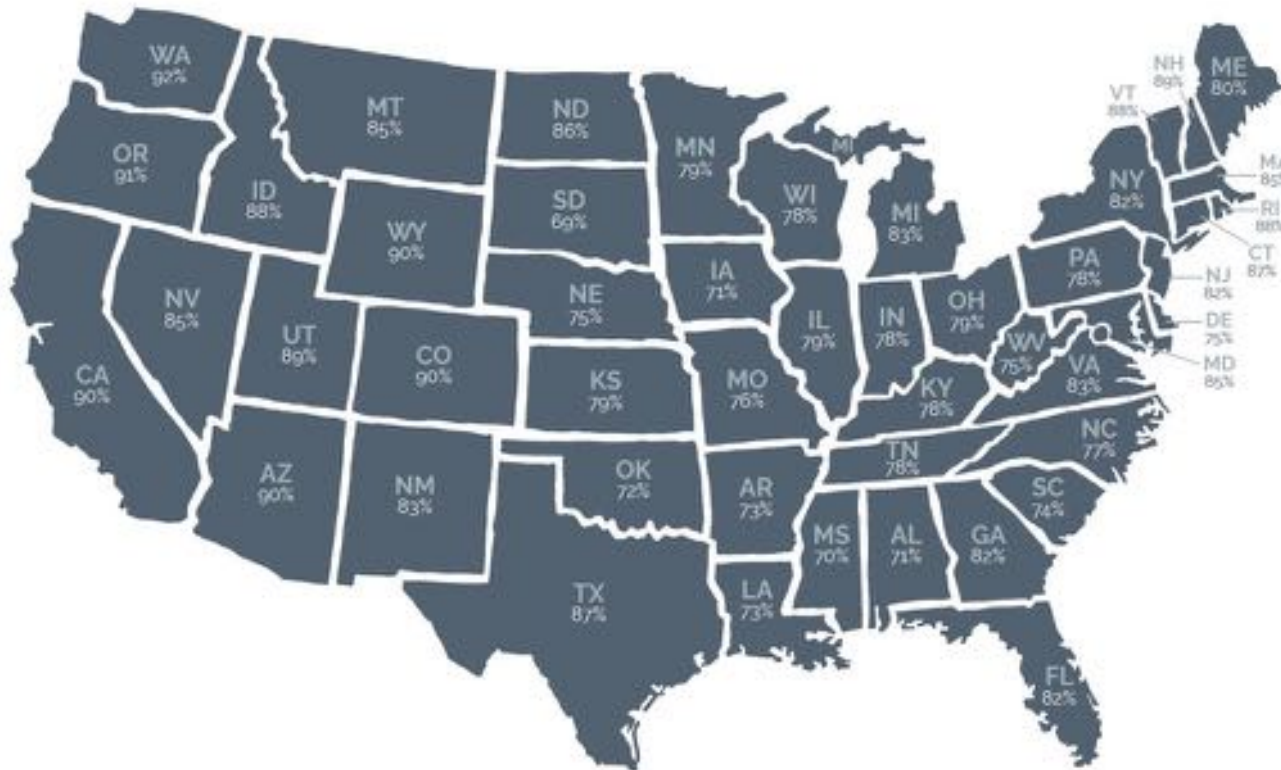
While organic products have been available for decades in the U.S. fast-moving consumer goods (FMCG) industry, they've become **more accessible** than ever in the last few years. Despite this growing popularity, organic products are not necessarily a fad. Sales of organic FMCG haven't waned, and given sales trajectory across the store, organic appears to be a long-age-old growth driver that's here to stay.

“And at a time when the FMCG industry overall has experienced flat volume consumption, this growth is huge.”

While it should not come as a surprise to hear about the prominence of organic products, it might be interesting to hear that sales continue to outpace previous years. In fact, they now account for more than \$21 billion in sales and are up nearly 9% in dollars and 8% in units. And at a time when the FMCG industry overall has experienced flat volume consumption, this growth is huge.

Gone are the days when organic products catered to a singular or specific audience. Today, organics have hit the mainstream. Not only are organic products boosting our industry's top-line, they are being purchased more by all generational and age cohorts. That said, some segments of our population are leaning into organic more than others.

Household purchasing



Over **82%** of
U.S. households
buy organic



Organic Trade Association

OTA.com



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INSIGHTS



ARTICLE

TOPS OF 2018: ORGANIC



FOODDIVE

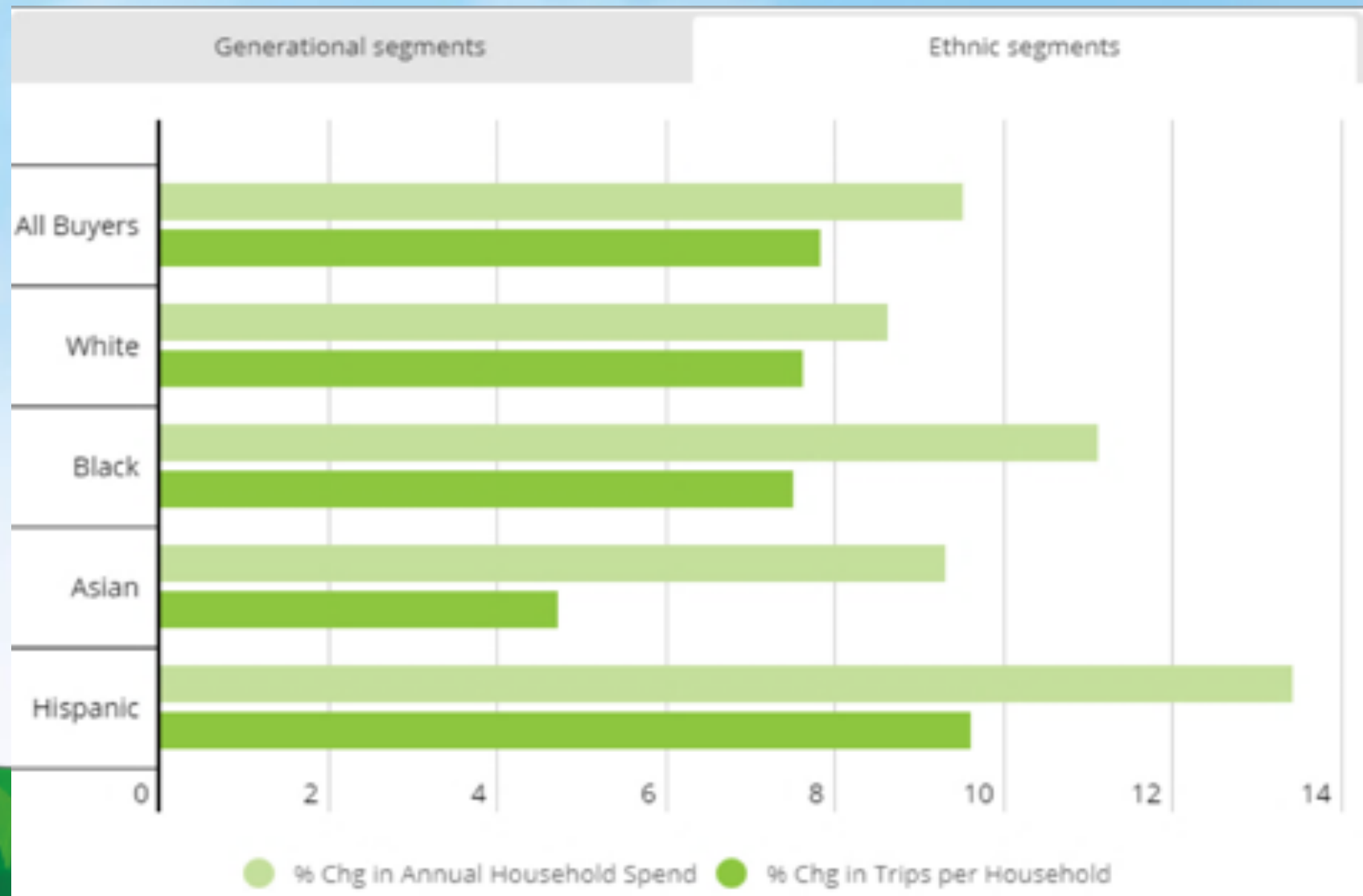
Deep Dive Opinion Library Events Jobs Topics ▾

BRIEF

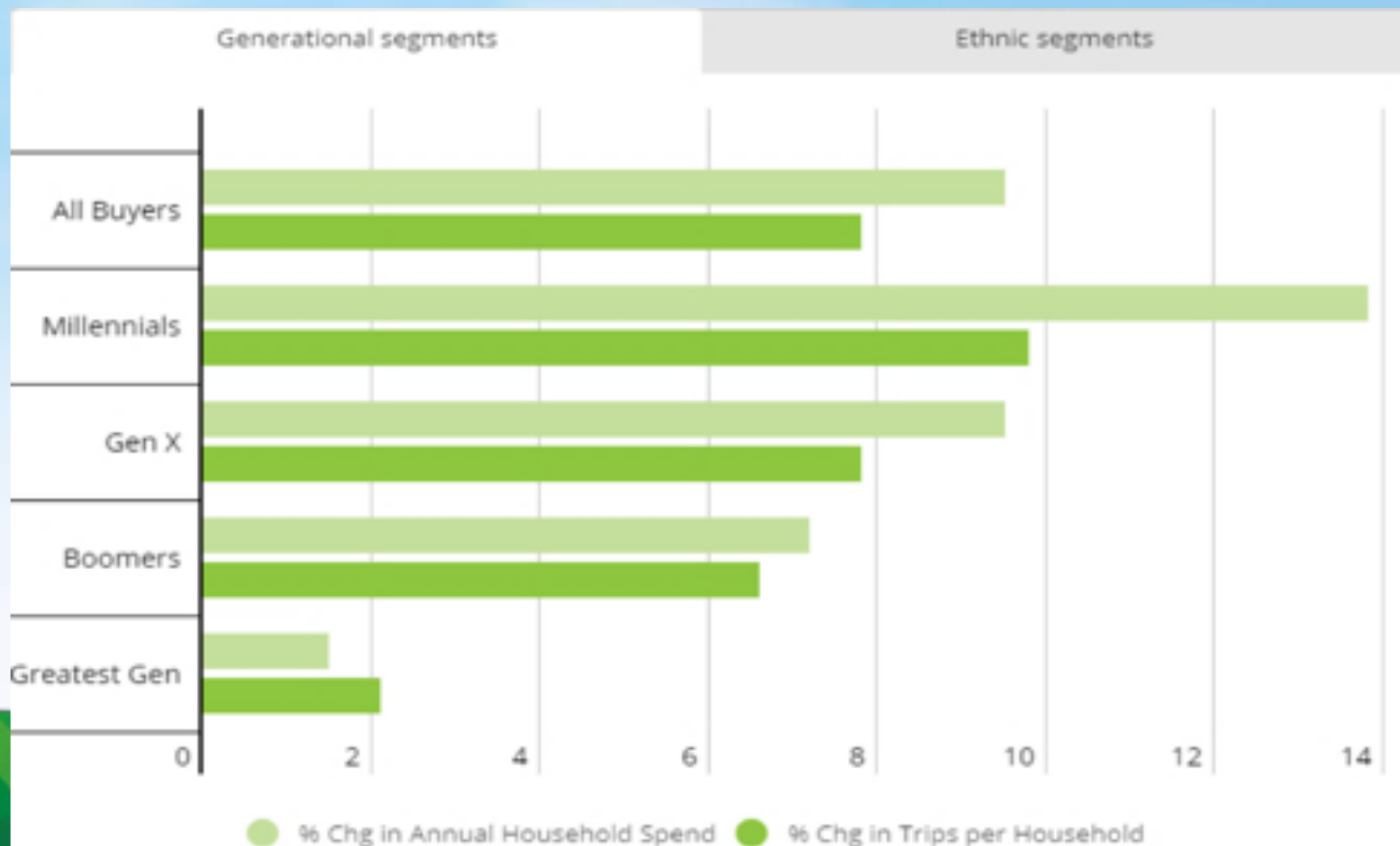
Millennials and Hispanics drive boost in organic sales



Categories ranked by highest organic dollar sales in the latest year.



Categories ranked by highest organic dollar sales in the latest year.



Values Matter to Millennials



75% of millennials are willing to pay more for sustainable offerings

66% willing to pay more to buy from companies committed to positive social and environmental practices





New wave of organic shoppers

Currently, 25% of Millennials have children. Within the next 10-15 years, 80% are expected to become parents, equating to about 60 million potential organic shoppers.

The parenting kids receive also shapes their buying habits as adults. Heavy buyers of organic – whether Millennials with or without children – are much more likely to have been raised eating organic foods and being taught to make organic choices.



Organic Trade Association

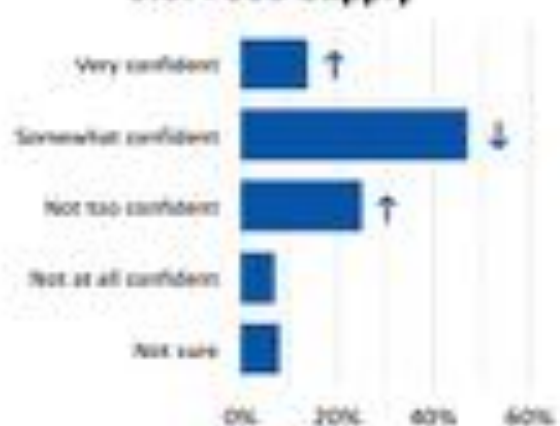
OTA.com



Confidence in food supply down slightly

Foodborne illness remains top safety concern, but concern about carcinogens on the rise

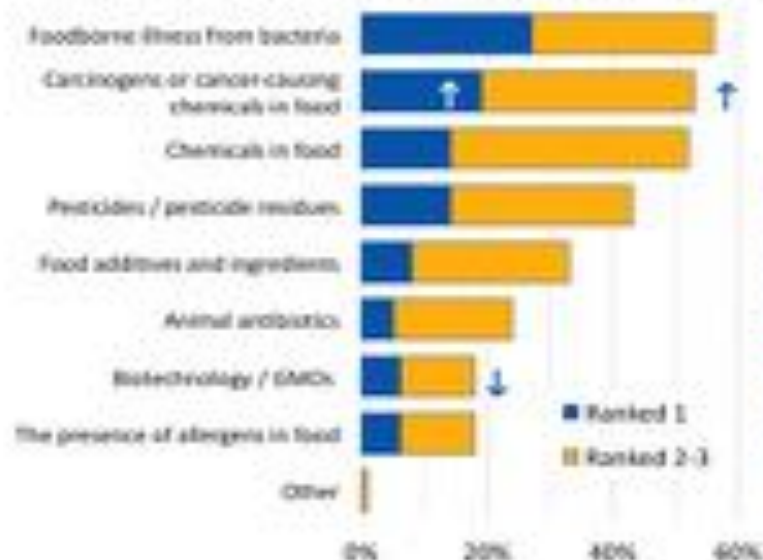
Confidence in Safety of U.S. Food Supply



35%

Of interviewees are not confident, vs. 34% of boomers

Most Important Food Safety Issues Today



56%

Of those who see there is a lot of conflicting information about what foods to eat/shouldn't eat, carcinogens is a top 1 issue, vs. 40% of those who do NOT see conflicting info

Q1 (Overall, how confident are you in the safety of the U.S. food supply? (n=1,000)
Q2 What is your opinion on the most important food safety issues today? (n=1,000)



INTERNATIONAL
FOOD INFORMATION
COUNCIL FOUNDATION

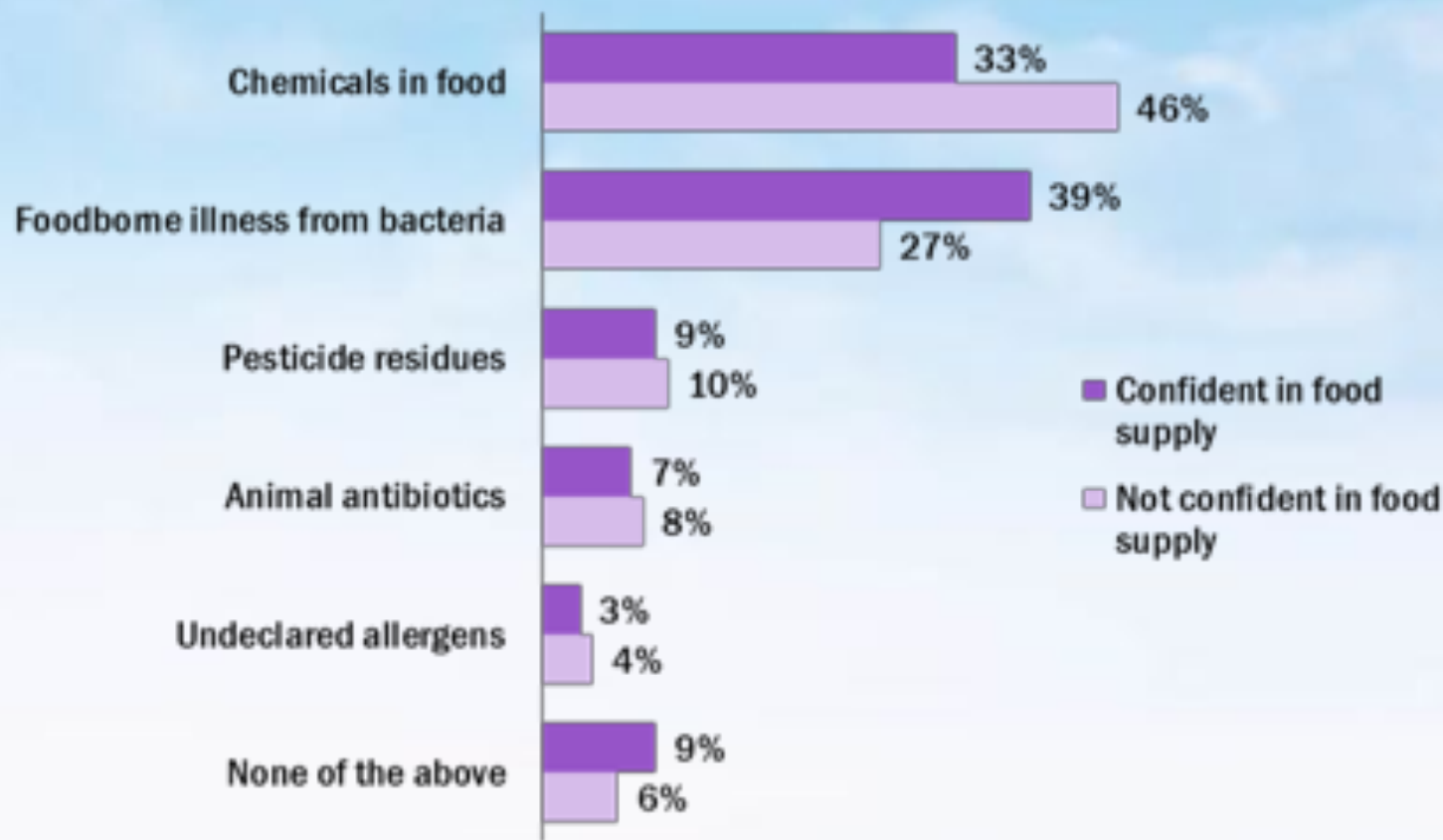
2017 FOOD & HEALTH SURVEY



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Those who are not confident in the U.S. food supply are much more likely to be concerned about chemicals in food and less concerned about foodborne illness.

In your opinion, what is the most important food safety issue for you and your family today?



2015 confident in food supply n=610; not confident in food supply n=330



HEALTH

PESTICIDES LINKED TO AUTISM IN STUDY

BY KASHMIRA GANDER ON 9/19/18 AT 9:13 AM



New Scientific Paper: Broad Class of Pesticides Puts Children at Risk for Reduced IQ, Learning Disabilities



Search US edition

The Guardian

Ban entire pesticide class to protect children's health, experts say

IN THE JOURNALS

Metal, pesticide exposure increases CVD risk in Hispanic adults

The Washington Post

Food • Perspective

The truth about organic produce and pesticides



OrganicCenter.org



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Pesticide exposure causes serious health problems.....

Cancer: The 2008-2009 President's Cancer Panel predicted that 41% of Americans would be diagnosed with cancers in our lifetimes and determined that the "true burden of environmentally induced cancer has been grossly underestimated" and recommended choosing foods grown without pesticides or chemical fertilizers.

Leukemia: A report found that "exposure to pesticides is one of the most important causes of acute leukemia," in particular pointing out increased risk of childhood leukemia associated with exposure before conception, during pregnancy and during childhood.



Sobering Reminder 1:

CHEMICAL EXPOSURE DURING PREGNANCY

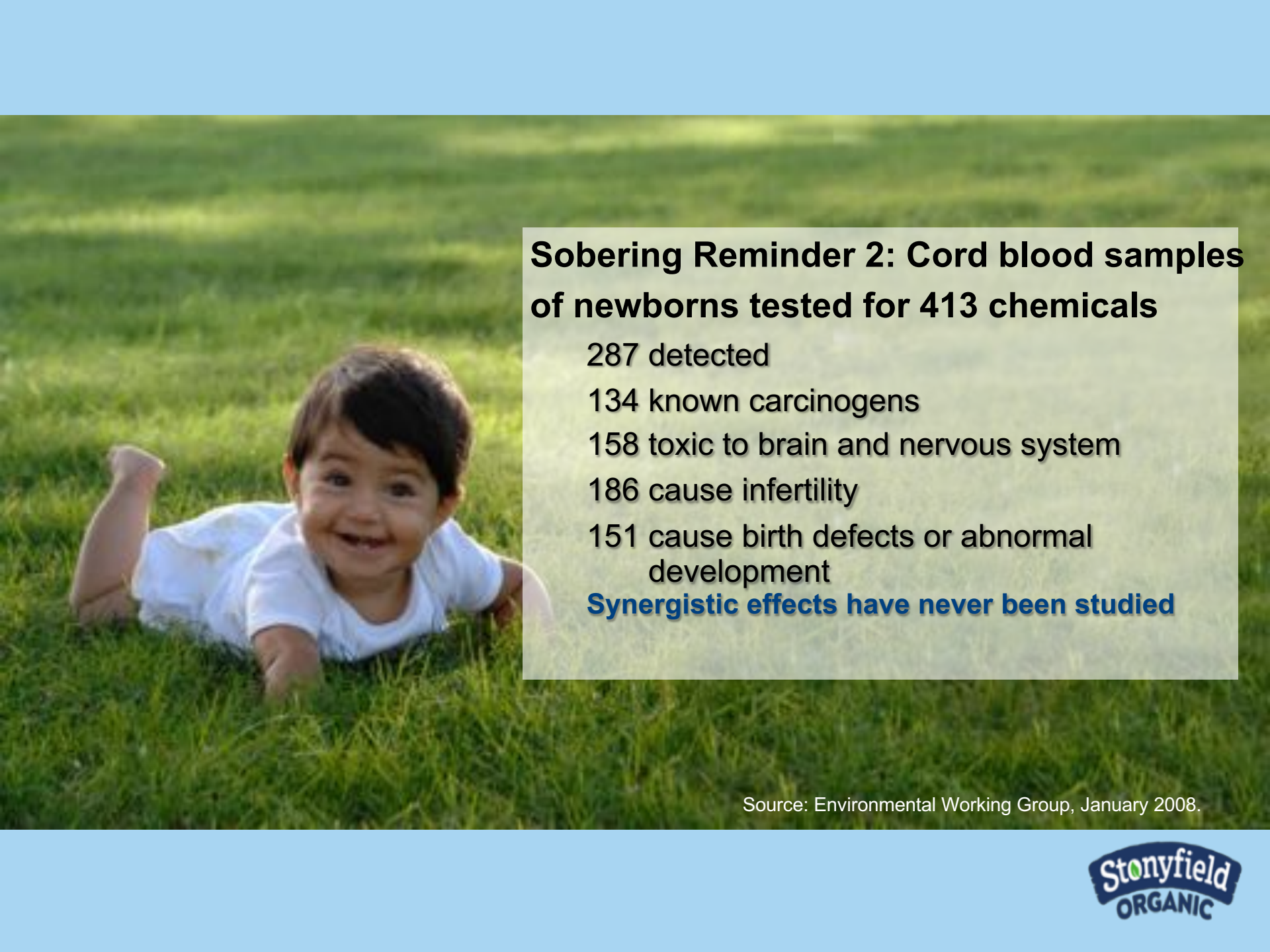
163 chemicals studied in women, ages 15-44
43 were found in 99% of tested pregnant women including:

- PCBs (linked to cancer & other health problems)
- Organochlorine pesticides
- PBDEs (flame retardants, including some banned)
- Phthalates (endocrine disruptor)
- Phenols (endocrine disruptor)
- PFCs (organ damage, reproductive problems)
- Perchlorate (affects thyroid function)
- PAHs (organ damage, cancer)



Some of these chemicals had been
banned
since before the women were born

SOURCES: UCSF study published in Environmental Health Perspectives, January 2011

A photograph of a baby with dark hair, wearing a white shirt, crawling on a lush green lawn. The baby is looking towards the camera with a smile. The background is a soft-focus green field.

Sobering Reminder 2: Cord blood samples of newborns tested for 413 chemicals

287 detected

134 known carcinogens

158 toxic to brain and nervous system

186 cause infertility

151 cause birth defects or abnormal development

Synergistic effects have never been studied

Source: Environmental Working Group, January 2008.



Sobering Reminder 3:

SAMPLE OF PESTICIDES USED ON NON-ORGANIC BANANAS



| <u>Pesticides</u> | Health and Environmental Effects |
|----------------------|--|
| <u>Fungicides</u> | |
| Mancozeb | Viewed as carcinogenic and can cause thyroid gland tumors |
| Tridemorph | Possible reproduction problems |
| <u>Nematicides</u> | |
| Terbutos | One of the most toxic organophosphates; accidents can lead to death |
| Ethoprofos | Extremely toxic organophosphates; accidents can lead to death; probable carcinogen |
| Fenamiphos | Extremely toxic organophosphates; accidents can lead to death |
| <u>Insecticides</u> | |
| Chloropyrifos | Organophosphate, nerve poison; medium to high toxicity for humans |

GLYPHOSATE (most used agrochemical in history)



Deemed Probable Carcinogen by the WHO IARC & Known Carcinogen by State of CA

Glyphosate is found in 60 to 100% of rain & air samples tested in Iowa and Mississippi by USGS

Feng-Chih Chang, Matt F. Simcik, P.D. Capel, 2011. "Occurrence and Fate of the Herbicide Glyphosate and Its Degradate Aminomethylphosphonic Acid in the Atmosphere," *Envir. Toxicology Chem.*, Vol. 30, pages 548-555

Glyphosate Was Found on Most Samples of Oat-Based Foods

| Type of Food | Product Name | Glyphosate (ppb)* | | |
|--------------|--|-------------------|----------|----------|
| | | Sample 1 | Sample 2 | Sample 3 |
| Granola | Nature's Path Organic Honey Almond granola | ND** | ND | |
| | Back to Nature Classic Granola | 620 | 170 | |
| | Quaker Simply Granola Oats, Honey, Raisins & Almonds | 430 | 400 | |
| | Back to Nature Banana Walnut Granola Clusters | 30 | 30 | 340 |
| | Nature Valley Granola Protein Oats 'n Honey | 220 | 170 | |
| | KIND Vanilla, Blueberry Clusters with Flax Seeds | 50 | 60 | |

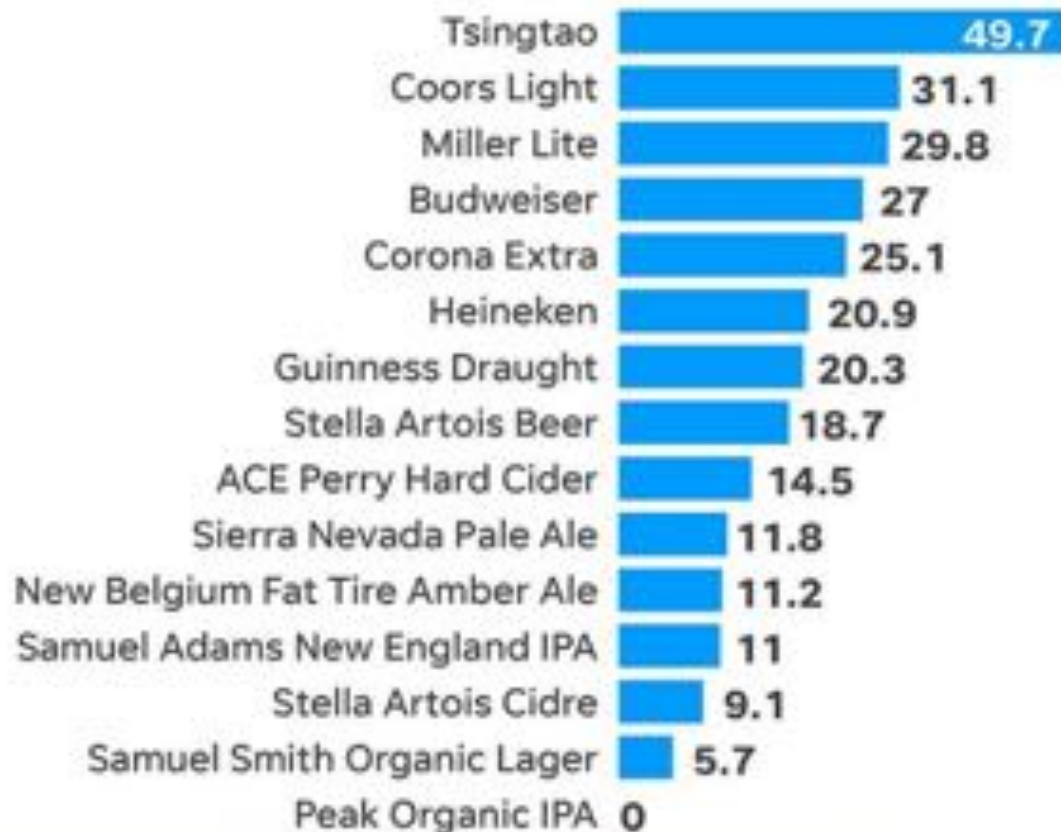
<https://www.ewg.org/childrenshealth/glyphosateincereal/>



Hidden chemicals in beer

The weed killer glyphosate was found in 14 of the 15 beers U.S. PIRG tested.

Amount of glyphosate (parts per billion)



New Studies About Pesticides/Health Come Out Monthly



Non-Hodgkin Lymphoma linked to glyphosate-based herbicide exposure

Mar 04, 2019

A study recently published in the journal *Mutation Research/Reviews in Mutation Research* links glyphosate-based herbicides (GHB) like Roundup with higher rates of the cancer Non-Hodgkin Lymphoma (NHL). This formative paper combines a review of human studies with animal research that showed increased exposure to glyphosate increased NHL cancer in mice. The researchers also included a review of the mechanisms for how glyphosate causes cancer cell development, providing a critical link between the two.

Glyphosate is the primary active ingredient in Roundup, one of the most commonly used pesticides in the U.S. It has been detected in many foods, and people can also be exposed from contaminated water and dust. To test if the highest exposure to glyphosate-based herbicides would lead to increased risk of Non-Hodgkin Lymphoma, researchers analyzed six studies with nearly 65,000 human participants, and every publicly available study on glyphosate exposure and the development of NHL cancer in mice.



Photo credit: Charles O'Rear; USDA

For further information, contact the author at [redacted]



...and more problems

Diabetes: Risk of developing type 2 diabetes was tied to exposure to pesticides, in particular organochlorines and metabolites.

Attention-Deficit/Hyperactivity Disorder (ADHD): A 2009 study published in *Pediatrics* suggests that children with higher levels of OP pesticide metabolites were more likely to have ADHD than children with lower levels.



....and more problems....

Slowed brain development and lower I.Q.: A series of recent studies in *Environmental Health Perspectives* saw a link between prenatal exposure to organophosphate (OP) pesticides and lower I.Q. scores. Exposure to common insecticides and pesticides in the womb can reduce a child's IQ by 4-7% before they reached school age (compared to children with lower levels of exposure).





U.S. World Business Tech & Science Culture Sports Health

HEALTH

PESTICIDES LINKED TO AUTISM IN STUDY

BY KASHMIRA GANDER ON 9/19/18 AT 9:13 AM



OUR WORK OUR EXPERTS OUR STORIES GET INVOLVED ABOUT US

New Scientific Paper: Broad Class of Pesticides Puts Children at Risk for Reduced IQ, Learning Disabilities



Search US edition

The Guardian

Ban entire pesticide class to protect children's health, experts say

IN THE JOURNALS

Metal, pesticide exposure increases CVD risk in Hispanic adults

The Washington Post

Food • Perspective

The truth about organic produce and pesticides



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Organic: The Best Way to Protect Yourself and Your Family

JAMA Network™

December, 2018

“Now a new French study that followed 70,000 adults, most of them women, for five years has reported that the most frequent consumers of organic food had 25 percent fewer cancers over all than those who never ate organic.

Those who ate the most organic fruits, vegetables, dairy products, meat and other foods had a particularly steep drop in the incidence of lymphomas, and a significant reduction in postmenopausal breast cancers.”

Curl, C. Estimating Pesticide Exposure from dietary intake and organic food choices. *Environmental Health Perspectives*, 2015, 123, 5.

Baudry, Julie, Karen E. Assmann, Mathilde Touvier, et al. Association of Frequency of Organic Food Consumption With Cancer Risk. Findings From the NutriNet-Santé Prospective Cohort Study. *JAMA Internal Medicine*, 2018, 178(12):1597-1606.



Los Angeles Times

Can organic food help you reduce your risk of cancer? A new study suggests the answer may be yes

By KAREN KAPLAN OCT 22, 2008 3:45 PM



CNN

Organic foods cut your cancer risk, study suggests

CHICAGO SUN-TIMES

Does eating organic food prevent cancer? Yes, a new study suggests

The Washington Post

Health & Science

An organic diet may lower cancer risk.



The Organic Center
OrganicCenter.org



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Pesticide Levels In Families Dropped By 60% After One-Week Organic Diet: Study

📅 FEBRUARY 12, 2019 📁 HEALTH AND WELLNESS



Pesticide levels in families dropped by 60% after one-week organic diet: study

A new [peer-reviewed study](#) shows that eating a completely organic diet—even for just one week—can dramatically reduce the presence of pesticide levels in people, a finding that was characterized as “groundbreaking” by critics of an industrial food system that relies heavily on synthetic toxins and chemicals to grow crops and raise livestock.



Natural & Non-GMO Does NOT Mean Organic

ORGANIC vs. NATURAL vs. NON-GMO

| | ORGANIC | NATURAL | NON-GMO |
|--|-------------|-----------------|-----------------|
| Toxic persistent pesticides & herbicides | NOT Allowed | Allowed | Allowed |
| GMO's | NOT Allowed | Allowed | NOT Allowed |
| Antibiotics | NOT Allowed | Allowed | Allowed |
| Growth hormones | NOT Allowed | Allowed | Allowed |
| Sludge & irradiation | NOT Allowed | Allowed | Allowed |
| Animal Welfare requirements | YES | NO | NO |
| Lower levels of environmental pollution | YES | Not Necessarily | Not Necessarily |
| Audit trail from farm to table | YES | NO | NO |
| Certification required, including inspections | YES | NO | NO |
| Cows required to be on pasture for pasture season | YES | NO | NO |
| Legal restrictions on allowable materials | YES | NO | NO |



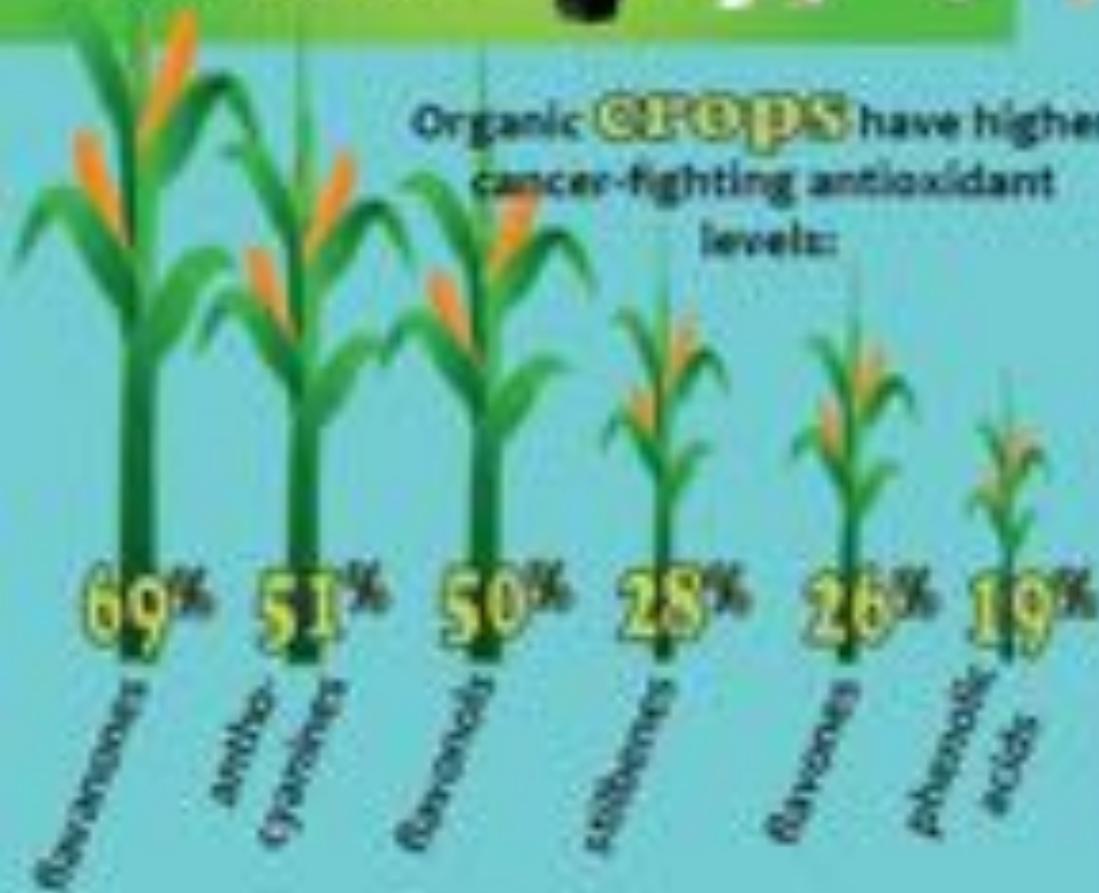
Organic **milk** has

62%

more healthy omega-3
fatty acids than
conventional milk



Organic **crops** have higher
cancer-fighting antioxidant
levels:



Have-A-Cow



portrait of a cow

The Have-A-Cow program is a fun way to learn about the lives of real dairy cows and their farm families. Take a peek at the cows and their personal stories. Click on the cows of your choice and download their photos and bios telling you about their life on the farm. Seasonal updates from the cows will be posted on our website. You can sign up to receive our [Have-A-Cow update](#) by email.



Bubba



Cocoa



Nanner



Spiffy



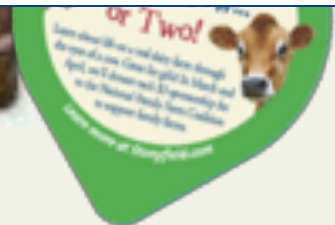
Tuttle



Vega



Viper

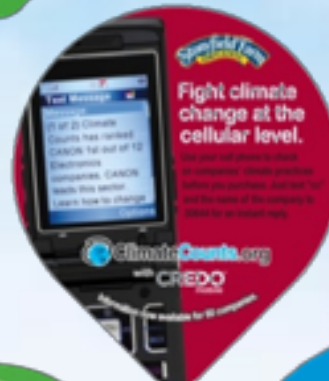


Educational program to teach consumers about life on a farm through the eyes of a cow

Consumers get sponsorship certificate, picture and bio of cow plus quarterly e-mail updates of life on farm

Hundreds of thousands of participants since 1989

LIDS SUPPORTING THE MISSION



FARM CAM: Connecting consumers to the farm

home / healthy planet / organic farming / farm cam

get a glimpse of farm life



1 farmer + \$150 Flip camera

**Shares everyday life + brings
farm to the city**



YoTUBE: Using video to tell brand stories

YoTube videos

short takes for a healthier planet

von Tapp Farm, VT
One of the Organic Valley family
farms that supply milk for our yogurt

Meet organic farmers & growers, and see where our ingredients come from.



BRAZIL ORGANIC SUGAR



**In 1997, converted 3,000 acres to organic.
Today, 35,000+ acres are certified organic**



PAYOFFS

- Green harvesting saves 40K tonnes CO₂/yr & 3.5 million liters water/hr at mill
- 90% reduction in pest damage
- Increased biodiversity (312 species of birds, amphibians, reptiles, and mammals)
- Increasing groundwater quality and volume
- Topsoil carbon content nearly equal to native forests
- 10% Yield Increase
- 50% Cost Premium Decrease



The Environmental Impact of Using Native Organic Cane Sugar Over Conventional Sugar



The Native Green Cane Project in Brazil is the largest producer of organic cane sugar in the world, proving that large-scale sustainable agriculture is possible. Choosing organically grown and processed cane sugar over conventional alternatives decreases Stonyfield Farm's ecological footprint.



Mechanical harvesters improve soil fertility by depositing nutrient-dense cane leaves and stalks back onto the fields. Harvesters also use low-pressure tires to avoid compaction and preserve the integrity of the soil.

For the 8.5 million pounds of sugar switched to Native organic cane sugar, Stonyfield helped...

- Avoid **446,250 pounds** of synthetic fertilizers that would have polluted soil and waterways
- Avoid **5,270 pounds** of pesticides, insecticides and herbicides that would have harmed the ecosystem and its inhabitants
- Remove **2.6 million pounds** of CO₂ from the air that would have contributed to climate change (equal to the annual emissions from about 255 cars)
- Restore **1,633 acres** of soil (about 1,235 football fields) to resemble the soil of virgin forests in the area

**Numbers above are based on approximate analyses compared to a weighted average of the impact of conventional beef and cane sugar*



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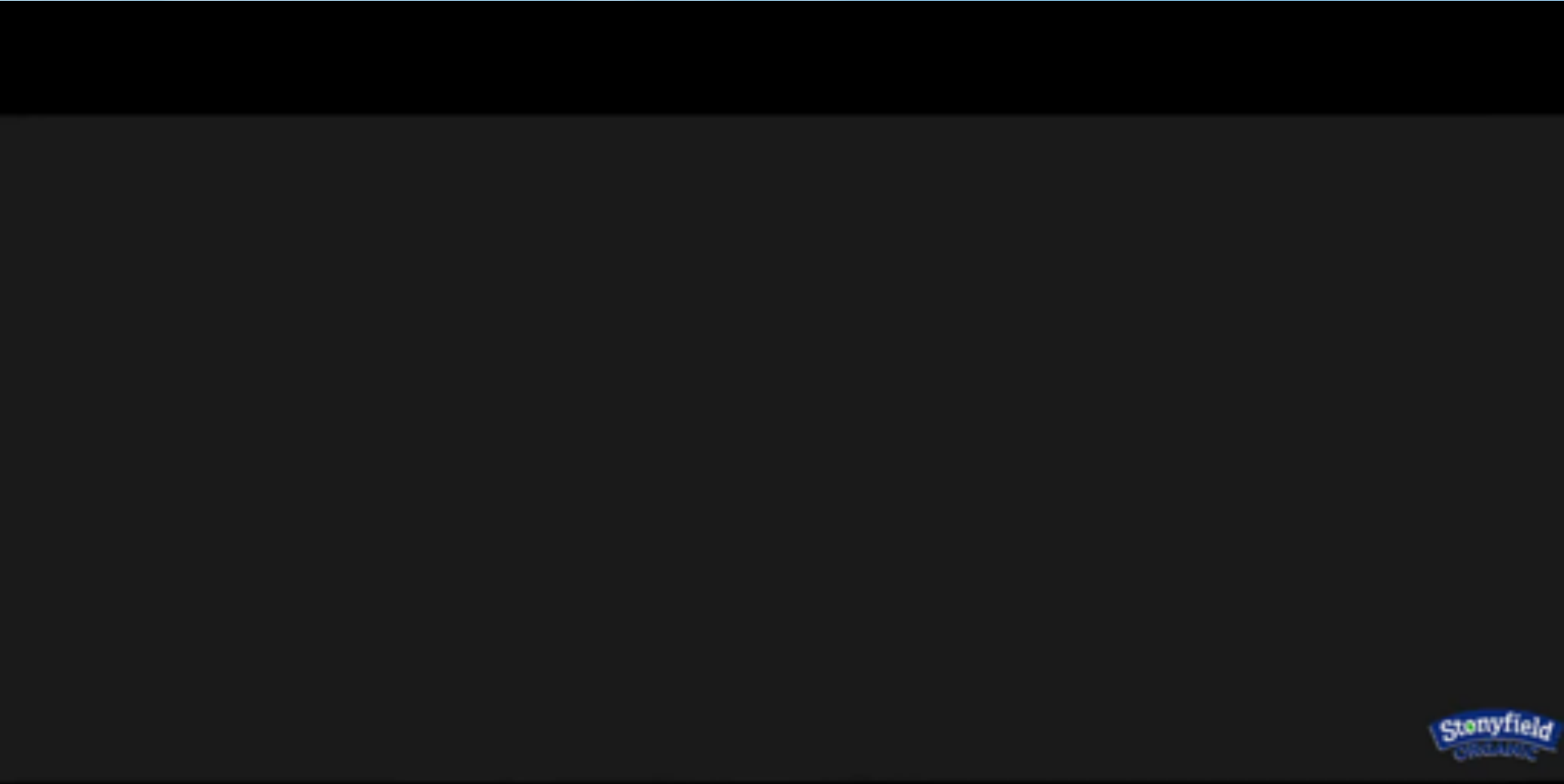


BECAUSE ALL FIELDS SHOULD BE ORGANIC



Please join us as we take on our biggest **MISSION** yet. We are working with communities across America and experts in the field to make all fields **ORGANIC** by stopping the use of harmful pesticides on playing fields. Our goal is to help communities across America take the necessary steps to convert to organic field maintenance and empower families everywhere by providing tools and resources to make change locally and in your own backyard.





THIS ISN'T
JUST GRASS.
THESE
ARE OUR
GRASSROOTS.
PLAY FREE.



When shown by your veterinarian, Stonyfield Organic yogurt may help your child's digestive health. Always consult your doctor about your child's health.

Join the largest, independently audited organic and non-GMO yogurt company in the U.S.

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THIS ISN'T JUST
A FIELD, IT'S THE
FOUNDATION OF
OUR CHILDHOODS.
PLAY FREE.



When shown by your veterinarian, Stonyfield Organic yogurt may help your child's digestive health. Always consult your doctor about your child's health.

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Stonyfield
ORGANIC

THIS ISN'T JUST
A PATCH OF DIRT.
THIS IS OUR
HOME TURF.
PLAY FREE.



When shown by your veterinarian, Stonyfield Organic yogurt may help your dog's digestive health. Always consult your doctor about your dog's health.

Join the largest, independently audited organic and non-GMO yogurt company in the U.S.

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We're excited to have Adam Scott join the StonyFIELDs campaign! The [TodayShow.com shared an exclusive interview](#) with Adam and details about the StonyFIELDs Initiative, giving us **25 million impressions** just on the first day!

[The video](#) is also posted on the Stonyfield Instagram, Twitter, YouTube and Facebook pages, please feel free to like and share it with all your friends and family



Stonyfield Organic's Single-Serve Yogurt Snacks Need No Spoons for Eating

"Many single-serve yogurt products that are designed for on-the-go eating are conveniently packaged with built-in spoons but Stonyfield Organic's newest trio of products offer a fresh new take on this idea, as well as a better-for-you take on dipable snack packs."

1.5 Million Impressions!



Not All Organic Milk Is Equally Healthy, Says New Consumer Group

"Stonyfield Farms is among Cornucopia's top winners available nationwide" - 12 Million Impressions!!

[Cooking Light](#) (again!): **4 Kids' Snacks That Are Nutritionist- (and Mom-) Approved**

Stonyfield Organic Whole Milk Yogurt Squeeze Packets - another 12 Million Impressions!



We invite bloggers from across the USA to join us on our Farm Tours to help them learn the organic difference of our company.

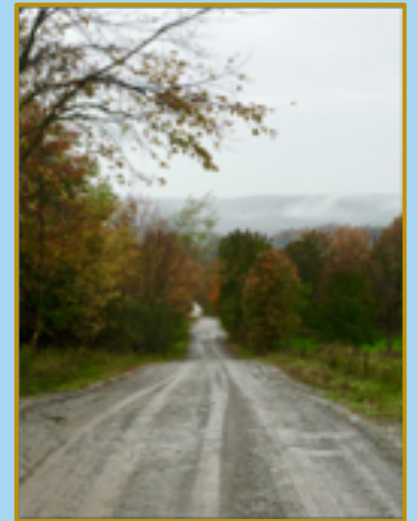


GABRIELLE BLAIR, 450,000 Followers

Design Mom:

Why I'm Obsessed with Organic Farming

"I'm telling you, if you've had worry over dairy, it would totally disappear if you saw Julie's farm. It's basically a super healthy mini ecosystem. The cows nourish the earth, the earth nourishes the cows. With no chemical run-off, no algae blooms, no dead zones, no waste...it's amazing."



GABY DALKIN, 1.2 Million Followers

What's Gaby Cooking



“The whole trip was incredibly eye opening and while I’m not trying to tell everyone that everything needs to be organic, I’m certainly making changes here and there to make my eating as clean as possible! There is a TON of info on their site if you want to read more about it right [here!](#).”



GINA HOMOLKA, 18 Million Followers

Why Purchase Organic Dairy?

- It's better for you. Because it comes from cows that are actively grazing on grass, as nature intended. Organically raised cows spend their days outside on pasture so the milk they produce is significantly higher in Omega-3 fatty acids and CLA (conjugated linoleic acid), heart-healthy fats that can help lower bad cholesterol and increase good cholesterol. There's also compelling evidence that many organic fruits and veggies are more nutritious, too.
- It's better for our children's health. Research has demonstrated that an organic diet can dramatically reduce pesticide levels in kids' bodies.
- It's good for the planet. One of the main goals of organic farming practices is to avoid soil contamination as well as rivers, drinking water, and air with toxic persistent chemicals.
- It's also better for the farmer and their neighbors, as they aren't exposed to potentially carcinogenic herbicides.
- It's better for the bees."

skinnytaste®
DELICIOUS HEALTHY RECIPES FROM MY FAMILY TO YOURS



**SKIP THIS
RIDICULOUSLY
LONG LIST OF
CHEMICALS
AND JUST
GO WITH
ORGANIC**



To skip the full list

[Don't Click Here >](#)

ONLY ORGANIC PROTECTS YOU AND YOUR
FAMILY FROM OVER 700 CHEMICALS.



**OVER 700 REASONS
TO JUST GO WITH
ORGANIC.**

[See Them All >](#)



**SKIP THIS
RIDICULOUSLY LONG
LIST OF CHEMICALS
AND JUST GO WITH
ORGANIC.**

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**PLEASE JOIN US FOR THE NEXT
AUCKLAND HEI
NOVEMBER 19-20 AUCKLAND**
<https://hirshberginstitute.com/>

