
SMUCKER'S
THE J. M. SMUCKER COMPANY
SJM50
CELEBRATING 50 YEARS ON THE NYSE


SJM50
FOODSERVICE BUSINESS UPDATE
Kevin Jackson
Vice President and General Manager, Foodservice

Smucker Foodservice Operations

Providing consumers with opportunities to experience our brands away from home.

$500+ Million
PROJECTED FY16 NET SALES



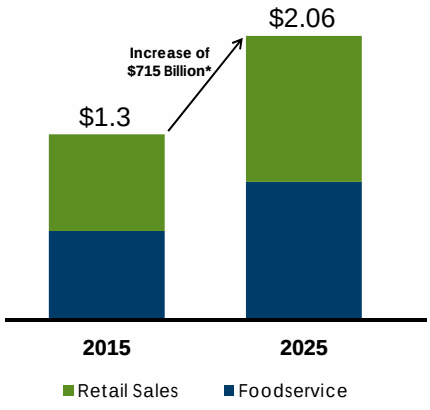


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Sales Growth Over the Next Decade

Food industry growth is projected to come equally from Foodservice and Retail sales.

Projected Food Industry Sales
(in trillions)



Total Growth of
$715 Billion*
Projected Over the Next Decade



*Assumes 3% inflation
Source: Technomic Food Industry Transformation, The Next Decade 2025

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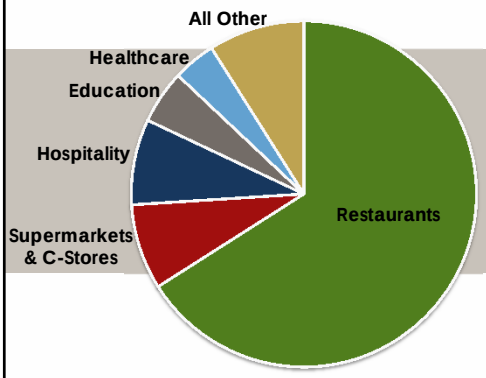
Food Industry Growth Drivers

FRESH FORMAT RETAILERS	ONLINE AND OTHER FOOD RETAILERS*	ONLINE DISTRIBUTORS
12% ANNUAL GROWTH RATE	**13.5%** ANNUAL GROWTH RATE	**20%** ANNUAL GROWTH RATE
		
$60 Billion Annually by 2025	**$60 Billion** Annually by 2025	**$16 Billion** Annually by 2025

*Other Food Retailers include Delivery, Home Meal Kits, Farmers Markets, and Community Supported Agriculture
Source: Technomic Food Industry Transformation, The Next Decade 2025

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Foodservice Industry by Segment



2% GROWTH
PROJECTED OVER THE NEXT FIVE YEARS

Source: July 2015 Technomic, Inc. (real growth; does not assume 3% inflation)

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Foodservice Industry

OPPORTUNITIES



Positive Economic Indicators



Data Sharing



Category Management

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Foodservice Industry

EVOLVING TRENDS



Menu Transparency



Customization



Blurred Channels

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Our Food Offerings and Segment Focus

Focused on segments where our brands are in front of consumers.





RESTAURANTS



CASH 'N CARRY



LODGING



EDUCATION K-12



HEALTHCARE

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USDA Peanut Program

Growth opportunity for our branded peanut offerings in schools.

CURRENT PORTFOLIO	NEAR-TERM INNOVATION	LONG-TERM INNOVATION
		
Smucker's Uncrustables	*Smucker's Uncrustables*	Protein Shakes
Jif 4lb Peanut Butter	Smart Snack Bars	Peanut and Fruit Snack Mixes
Jif 1.1oz Portion Control		Meal Replacement Offerings

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Our Coffee Offerings and Segment Focus

Breadth of offerings provides variety to meet customer demand.

Newest Equipment Offering





OFFICE COFFEE SERVICE



HOSPITALITY AND GAMING



COLLEGE AND UNIVERSITY



CASH 'N CARRY



HEALTHCARE

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Strong Branded Presence in Foodservice

	SMUCKER'S	JIF	SAHALE SNACKS	Folgers	CAFÉ BUSTELO
Family Dining	✓				
Fast Casual	✓	✓	✓		
Healthcare	✓	✓	✓	✓	
Education (K-12 and Universities)	✓	✓	✓	✓	✓
Lodging & Hospitality	✓	✓	✓	✓	✓
Cash 'N Carry	✓	✓		✓	✓
Office	✓	✓	✓	✓	✓

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