



Numerator

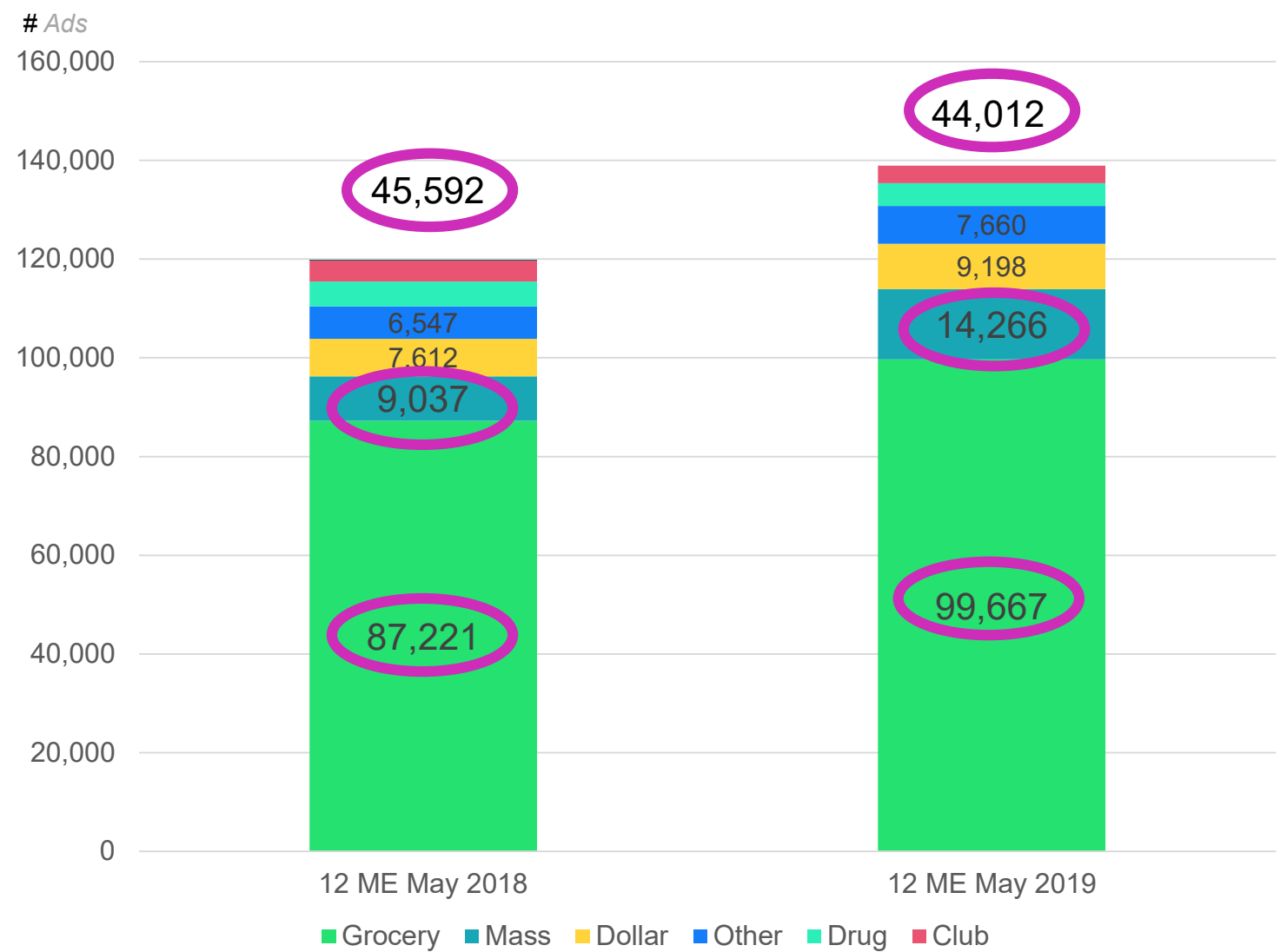
Strength in Numbers

Barbeque, Steak & Other Sauce Promotions Insights, June 2019

Prepared for the Impact Group

Barbeque, Steak, & Other Sauce Promotions Increased 16% from Last Year

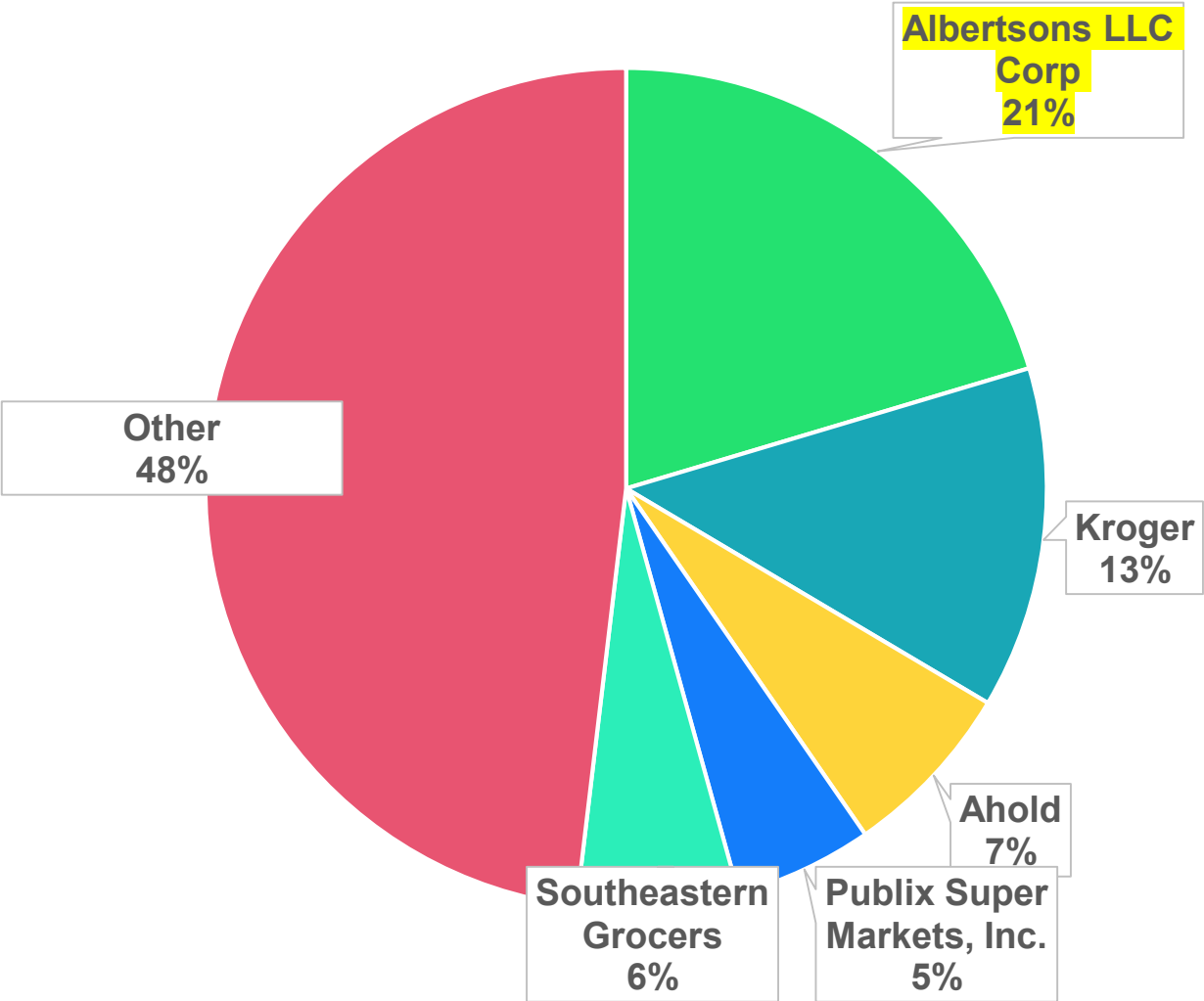
Promotions within the Grocery channel have increased by more than 12,000 ads, and grew within the Mass channel by 58%.



Within Grocery Channel, Albertsons owns Largest Share of Sauce Promotions

Parent Retailer Share of Grocery Channel Promotions, Barbeque, Steak & Other Sauce Category,
12 ME May 2019

The top 5 Parent Retailers represent 52% of total Grocery promotions for the Barbeque, Steak, & Other Sauce Category, and together increased the number of ads by 19% from year prior.



Additional Brands Gain Promotional Support, Appearing in the Top 10 Promoted Brand Ranking This Year

Non-barbeque brand Kikkoman, along with Hunt's and Bull's Eye rank in the top 10 promoted brand list this year, while Private Selection, Kroger brand, and Signature Kitchens fall in rank from last year.

Total Brand Share, Barbeque/Steak Sauce, Grocery Channel

Total Brand Share	12 ME May 2018	Total Brand Share	12 ME May 2019
Sweet Baby Ray's	8.9%	Sweet Baby Ray's	8.8%
Kraft	6.9%	Kraft	7.3%
Frank's RedHot	5.3%	Frank's RedHot	6.1%
Heinz	5.3%	Heinz	4.8%
A.1.	4.1%	A.1.	4.0%
Private Selection	3.6%	Stubb's	2.8%
McIlhenny	3.3%	McIlhenny	2.3%
Kroger	2.3%	Kikkoman	1.8%
Stubb's	2.3%	Hunt's	1.5%
Signature Kitchens	1.7%	Bull's-Eye	1.4%
Others	56.1%	Others	59.2%