Sugar Reduction
Never Tasted So Sweet
Speakers

Käti Ledbetter
Senior Manager Applications
Science & Technology
ADM Sweeteners

Käti Ledbetter is the Senior Manager leading the Applications Science and Technology Team for ADM R&D based in Decatur, Illinois, leveraging her depth and breadth of functional ingredient expertise along with project management skills to drive rapid and innovative solutions for the consumer. Working with the Bakery, Snacks and Confections Team, Beverage and Dairy Team, and Sensory Sciences, Käti leads efforts to provide customer-facing technical support. She and her team work across all ADM business units and ingredient lines to provide creative solutions to meet customer needs. Käti earned her Bachelor and Master of Science degrees from University of Missouri-Columbia and Kansas State University, respectively.

Amy Williams
Marketing Manager
ADM Sweeteners

Amy Williams is the Integrated Marketing Communications Manager leading the planning support for Carbohydrate Solutions teams and Golden Peanut and Tree Nuts within Oilseeds for ADM Marketing in North America. Amy works closely with all agencies to drive content development, guide cross-functional content creation, support sales enablement development, execute marketing mix analysis and manage IMC business impact performance and reporting.

Mina Kang
Market Trends & Insights Manager
ADM Sweeteners

Mina Kang is a Market Trends & Insights Manager leading the efforts in understanding consumer behaviors and marketplace dynamics for ADM North America. Based in Chicago at ADM’s global headquarters, Mina’s expertise in Consumer Insights, Shopper Insights, and Category Management helps ADM connect customers with purposeful ingredients and holistic solutions, ensuring that new food and beverage products deliver on broader trends occurring within the industry. Mina is a graduate of Penn State University, earning Bachelor of Arts degrees in Advertising/Public Relations and Psychology. She also holds a Master of Arts in Social Sciences from the University of Chicago.
What's Behind the Reduced Sugar Conversation?
Consumers are concerned and taking action

When it comes to sugars and sweeteners, consumers are increasingly

- **Limiting the amount** of sugar in their diets
- **Checking labels** for sugar content and type of sugar/sweetener used
- **Buying items with** low/reduced sugar positioning
Nearly 70% of consumers are very or somewhat concerned about the sugars/sweeteners used in the products they use today.

But consumer attitudes about sugars and sweeteners vary

30% I’m okay with moderate amounts of sugar

21% I believe you can create foods that taste great without the added sugar

21% I’m trying to eliminate as much sugar from my diet as possible but I don’t want to compromise taste

15% I’m okay with artificial sweeteners

Not only does taste dictate preference, it also influences consumers’ willingness to pay more for lower sugar products

49% Yes, I would definitely pay more for less sugar and taste I expect

31% I’m not sure if I would pay more

20% No, I would not pay more
Two Ways to Think About Sugar Reduction

1. As a Package Claim
   - “Reduced sugar” claims may signal the use of unwanted ingredients/sweeteners
   - Claims like “less sugar” could signal potential loss in taste
   - Examples: “diet”, “lower sugar than x”

2. As an End Goal
   - Higher acceptance of other sweetening sources
   - Perception of a “better way to sweeten”
   - Higher quality product with real ingredients (no added sugars)
   - Designing for a different set of consumer behaviors (i.e., consumers who reduce sugar by avoiding entire categories, engage in trade-offs or saving up for a smaller indulgences)
Today’s Consumer Mindset About Sweeteners

Consumers are making better choices, motivated by both functional and emotive factors based on their health as well as their peace of mind. The convergence of the two creates a real sweet spot: an opportunity for modern sweetening solutions.

"I’m making better choices"

To manage a health condition
By choice, as a preferred option
"I want to eat the things I want without giving everything up!"
Permissive Indulgence
For myself
For loved ones
What are consumers looking for?

Preserving ingredients in their organic state is preferred over the removal of substances, which may signal food processing and the use of substitutes.

On Packaging
1. No Additives/Preservatives
2. All Natural Product
3. Low/No/Reduced Sodium
4. Low/No/Reduced Sugar
5. High/Added Protein
6. Low/No/Reduced Calorie
7. Organic
8. Low/No/Reduced Fat
9. Vitamin/Mineral Fortified
10. GMO Free

Important When it Comes to Sweeteners
1. Natural Sweeteners
2. No Added Sugar
3. No Artificial Sweeteners
4. Reduced Sugar
5. Low Calorie
6. Zero or No Calorie
7. Low Glycemic

Ranking based on % of respondents from ADM OutsideVoice™ Sweetener Consumer Attitude & Usage Study
Not all sweetener consumers are created equal

ADM OutsideVoice℠ Sweetener Segmentation

Naturalists 30%
Natural is Best
“My preference is to avoid added sugar and artificial sweeteners as much as possible. I try to look for things sweetened with natural items like honey or fruits. Small amounts of sugar usage is acceptable. Artificial sweeteners are all chemicals and I don’t want that consumed by my family if I can avoid it.”

Moderationists 28%
Balance is Key
“I do like to limit sugar in my diet but everything in moderation is fine, same with sweeteners. I use them in my beverages, hot and cold as desired. I try and follow a clean eating lifestyle but do occasionally have a sweet treat that has sugar or artificial sweetener in it.”

Prohibitionists 16%
Too Much is Unnecessary
“I think too much sugar and artificial sweeteners are added to products today. Peanut butter and ketchup do not need to have sugar in them along with a lot of other products that have added sweetness. It makes it hard for consumers to get the products they want and need in a healthy version.”

Free Spirits 13%
It’s All Okay!
“I like most types of sugar. Regularly in my carbonated drinks. I prefer artificial sweeteners in my sweet tea. I typically keep Splenda® in my cabinet, and artificial sweeteners taste great in desserts.”

Dependocrats 7%
It Really Depends
“I really think it all depends on what you consume on a daily basis. Some people can get by with it, some can’t. It’s not really a big deal to me.”
Understanding the values and beliefs of these segments can better align ADM sweetening solutions with consumer needs

<table>
<thead>
<tr>
<th>Attitudinal Differences</th>
<th>Naturalists</th>
<th>Moderationists</th>
<th>Prohibitionists</th>
<th>Free Spirits</th>
<th>Dependocrats</th>
</tr>
</thead>
<tbody>
<tr>
<td>“I believe you can create foods that taste good without all the added sugar”</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
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<tr>
<td>“Yes, I would definitely pay more for less sugar and the taste I expect”</td>
<td>✓</td>
<td></td>
<td>✓</td>
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<tr>
<td>“No, I would not pay more for less sugar and the taste I expect”</td>
<td></td>
<td>✓</td>
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<tr>
<td>“I’m concerned about sugars/sweeteners in products today”</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>“I’m not as concerned about sugars/sweeteners in products today”</td>
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<tr>
<td>“I’m okay with artificial sweeteners”</td>
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<td></td>
<td>✓</td>
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</tr>
</tbody>
</table>

✓ = Overdeveloped (Index <120)
But don’t forget, context (category) matters

• For many consumers, their perceptions, attitudes and behaviors regarding sugar/added sugars/sweeteners are based on a host of factors including mood, product category/type, etc.

• Consumers are more forgiving with indulgent categories such as confections and ice cream which are expected to contain high amounts of sugar

• Consumers associate naturally sourced sweeteners (honey, fruit, agave, maple syrup, etc.) to categories with strong health halos
There’s no magic bullet for sugar reduction

There is no one thing that will be a drop-in replacement for sugar in all applications that also reduces added sugar on the label.

But...there is a large toolbox of ingredients to reduce sugar.
Sweetening Solutions

Uses a holistic approach and considers all attributes

- Formula
  - Reduced added sugars

- Nutrition
  - Nutritional panels for reformulation match control

- Taste
  - Additional flavor changes, if needed

- Color
  - Additional color changes, if needed

- Texture
  - Additional texture adjustments, if needed
Key Roles of Sugar in Food and Drinks

- Sweetness
- Taste Balance
- Mouthfeel/Bulking
- Other Functionalities
Key Roles of Sugar in Food and Drinks

Functionality
- Bulking
- Texture
- Freezing Point
- Starch Gelatinization
- Water Mobility
- Stability

Flavor
- Sweetness
- Caramelization
- Organic Notes
- Caramel Notes
- Browning Effects
- Masking of Acids

Consider
- The application
- Sugar’s functionality in the product
- Beneficial label claims

Combine ingredients to make a successful reduced sugar product using ADM sugar reduction toolkit
ADM Sugar Reduction Toolkit

Extensive Range of Sweetening Solutions

- Aroma Ingredients
- Beans & Pulses
- Colors
- Corn Syrups
- Crystalline Fructose
- Dextrose
- Dried Fruits
- Dry Honey
- Dry Molasses
- Dry Malt
- Erythritol
- Extracts & Distillates
- Fibersol®
- Flavors & Flavor Modifiers
- Flours
- Fruit Juices
- FruitUp™ for Sweetness from Fruit
- Maltodextrin
- Masking Solutions
- Mint Oils & Flavors
- Mouthfeel Enhancers
- Nut Butters
- Plant-Based Proteins
- Polyols
- Resolver™ Technology
- Seasonings
- Sodium Modifiers
- Starches
- SweetRight™ Stevia
- Taste Modifiers
- VerySweet™ Monk Fruit
- VivaSweet™ Sucralose
- Xanthan Gum

Plus, we offer sweetening blends and complete custom systems to help developers get to market faster.
There’s no one solution!

Case Studies: Proven solutions to reduce sugar without losing the taste
Better-for-you Blueberry Antioxidant Drink

A blueberry flavored antioxidant drink that strikes just the right balance of sweetness, flavor, calories, and simpler ingredients, for a better-for-you beverage that quenches more than just thirst.

Decrease Sugars  Reduce Calories
Better-for-you Blueberry Antioxidant Drink

Solving the Problem / Addressing the Gap
Consumers are looking for ingredients that are simpler and closer to nature. This trend—in combination with the trend toward reduced sugar and added functional ingredients—positions our Blueberry Antioxidant Drink as a thirst quenching, better-for-you beverage that is sure to please any consumer looking to feel good about their drink of choice.

Global Trend Alignment
Living Wellness

Finding the right balance of sweetness, cost, calories and labeling needs can vary by application and your goals. We offer you the best end-to-end ingredient solutions to deliver on these expectations—supported by our holistic product design and development process.

Concept Highlights
• 5 calories per serving
• 60mgs of total polyphenols per serving
• 3% juice (blueberry and strawberry)
• Colors from Nature™
• Natural flavor

Featured ADM Ingredients
• Erythritol
• SweetRight™ Stevia RA 80 and EMS 99
• Colors from Nature™ red and purple blend
• Natural flavor
• Antioxidant blend
Better-for-you Blueberry Antioxidant Drink

Ingredients:
- Filtered Water
- ADM Erythritol
- Blueberry Juice Concentrate, 65 Brix
- Strawberry Juice Concentrate, 65 Brix
- ADM Natural Blueberry FL WOWF
- Malic Acid
- ADM Purple Color Blend
- ADM Red Color Cherry
- ADM Antioxidant Blend
- Ascorbic Acid (Vitamin C)
- Filtered Water

Nutrition Facts:
- Serving size: 8 fl. oz. (236 ml) (238g)
- Calories: 5
- % Daily Value:
  - Total Fat: 0%
  - Saturated Fat: 0%
  - Trans Fatty Acids: 0%
  - Cholesterol: 0%
  - Sodium: 0%
  - Total Carbohydrates: 0%
  - Dietary Fiber: 0%
  - Total Sugars Less than 1g
  - Includes: 0g Added Sugars
  - Protein: 0%
  - Vitamin D: 0%
  - Calcium: 0%
  - Iron: 0%
  - Potassium: 0%

INGREDIENTS: FILTERED WATER, ADM ERYTHRITOL, BLUEBERRY JUICE CONCENTRATE, ADM NATURAL FLAVOR, STRAWBERRY JUICE CONCENTRATE, MALIC ACID, ADM NATURAL COLOR, GREEN TEA EXTRACT, WHITE TEA SOLIDS, APPLE PEEL EXTRACT, GRAPESEED EXTRACT, SULFITES, ASCORBIC ACID (VITAMIN C), ADM STEVIA LEAF EXTRACT.
Strawberry Yogurt Wellness Bar

A bar that hits all the health and wellness buttons, with only 9g total sugar per serving and just 6g added sugar per serving.

Decrease Sugars
Reduce Calories
Solving the Problem / Addressing the Gap
Consumers today are more in tune with their own individualized health and wellness needs, understanding that a one-size-fits-all approach no longer applies. They are looking for personalized nutrition, seeking out foods and beverages that contain the right mix of benefits and taste to help them look and feel good from the inside out. These strawberry yogurt bites are purposefully curated with a blend of DHA, probiotics and protein to get consumers closer to their long term wellness goals—without the added sugar.

Global Trend Alignment
Living Wellness

ADM understands these challenges and has assembled the industry’s most comprehensive ingredient portfolio to help you meet consumer demand. We’re at the ready to leverage our research-backed understanding of consumers’ expectations for taste and nutrition to help you deliver differentiated, delicious and personalized solutions that meet the needs of your brands and consumers.

Strawberry Yogurt Wellness Bar

Concept Highlights
- Just 6g added sugar per serving
- Brain health bite (32mg DHA per serving)
- 6g of protein per serving
- 10 billion BPL1 (Bifidobacterium lactis) live cultures per serving
- Good source of fiber per serving

Featured ADM Ingredients
- Fibersol®
- Glycerin
- Sorbitol Solution
- SweetRight™ Stevia RA80
- Sweet‘N’Neat® Dry Honey Powder
- Almonds (butter and diced)
- Onavita™ DHA Algal Oil
- Natural flavor
- Biopolis Bifidobacterium lactis BPL1
- Textura™ Soy and Navy Bean Crisps
- Navy Beans
- Strawberry Fruit Powder & Granules
- Sorghum Crisp
### Ingredients

<table>
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<tr>
<th>Ingredient</th>
<th>%</th>
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<tbody>
<tr>
<td>ADM Roasted Blanched Almond Butter</td>
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<tr>
<td>ADM Fibersol®-2L</td>
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<tr>
<td>ADM Glycerin</td>
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<td>ADM Non-Crystallizing Sorbitol</td>
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<td>ADM Sweet’N’Neat® 2000 Dry Honey Powder</td>
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<tr>
<td>ADM Probiotic (Bifidobacterium lactis)</td>
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<td>Filtered Water</td>
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<tr>
<td>ADM DHA Algal Oil</td>
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<td>Organic Date Paste</td>
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<td>Salt</td>
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<td>ADM Natural Strawberry FL WONF</td>
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<td>ADM SweetRight™ Stevia RA80</td>
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<td>ADM TEXTURA™ 80% Soy Crisp</td>
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<td>ADM Diced Almonds</td>
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<td>ADM Navy Bean Powder</td>
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<tr>
<td>Old-Fashioned Rolled Oats</td>
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<tr>
<td>ADM Strawberry Fruit Powder</td>
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<tr>
<td>ADM White Whole Grain Sorghum Crisp</td>
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<td>ADM Navy Bean TEXTURA™ Crisp</td>
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<tr>
<td>Confectionery Coating</td>
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<tr>
<td>ADM Strawberry Fruit Compact Granules</td>
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<td>TOTAL</td>
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### Nutrition Facts

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<tr>
<th>Serving size</th>
<th>2 squares (40g)</th>
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<tr>
<td>Amount Per Serving</td>
<td>Calories 170</td>
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<table>
<thead>
<tr>
<th><em>Total Fat 8g</em></th>
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<tr>
<td><em>Saturated Fat 2.5g</em></td>
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<tr>
<td><em>Trans Fat 0g</em></td>
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<tr>
<td><em>Cholesterol 0mg</em></td>
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<tr>
<td><em>Sodium 150mg</em></td>
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<tr>
<td><em>Total Carbohydrates 22g</em></td>
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<tr>
<td><em>Fiber 4g</em></td>
<td>16% Daily Value</td>
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<tr>
<td><em>Total Sugars 5g</em></td>
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<tr>
<td><em>Includes 3g Added Sugars</em></td>
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<tr>
<td><em>Sugar Alcohol</em> 4g</td>
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<tr>
<td><em>Protein 5g</em></td>
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<tr>
<td><em>Vitamin D 0mcg</em></td>
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<tr>
<td><em>Calcium 40mg</em></td>
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<tr>
<td><em>Iron 0mg</em></td>
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<td><em>Potassium 60mg</em></td>
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<tr>
<td><em>Riboflavin</em></td>
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<tr>
<td><em>Phosphorus</em></td>
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<tr>
<td><em>Magnesium</em></td>
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<tr>
<td><em>Zinc</em></td>
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<tr>
<td><em>Copper</em></td>
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<tr>
<td><em>Chloride</em></td>
<td>4% Daily Value</td>
</tr>
</tbody>
</table>

*The % Daily Value (%DV) tells you how much of a nutrient in a serving of food contributes to a daily diet. 2,000 calories a day is used for general nutrition advice.*

**INGREDIENTS:** YOGURT COATING (SUGAR, PALM KERNEL OIL, YOGURT POWDER (CULTURED WHEY PROTEIN CONCENTRATE AND CULTURED SKIM MILK), MILK, SOY LECITHIN (AN EMUSIFIER), NATURAL FLAVOR, SALT), ADM ALMOND BUTTER, ADM SOY CRISP (ISOLATED SOY PROTEIN, TAPIOCA STARCH), DATES, ADM ALMONDS, ADM GLYCERIN, ADM FIBERSOL-2L (SOLUBLE CORN FIBER), ADM COOKED NAVY BEAN POWDER, ADM SORBITOL, ADM STRAWBERRY FRUIT POWDER (STRAWBERRY PUREE CONCENTRATE, MALTODEXTRIN ), ADM WHOLE GRAIN SORGHUM CRISP, WHOLE OATS (ROLLED, OLD FASHIONED), SOY LECITHIN (PROCESSING AID), ADM SWEET’N’NEAT (HONEY, WHEAT STARCH, CALCIUM STEARATE (ANTI-CAKING AGENT), AND SOY LECITHIN (PROCESSING AID)), ADM NATURAL FLAVOR, SALT, ADM STRAWBERRY FRUIT GRANULES (STRAWBERRY PUREE CONCENTRATE, MALTODEXTRIN), ADM DHA OIL, ADM PROBIOTIC CULTURES (BIFIDOBACTERIUM LACTIS, TAPIOCA MALTODEXTRIN AND SUGAR), ADM STEVIA LEAF EXTRACT.

**Allergens:** Soy, Wheat, Tree Nut, Milk
30% Reduced Sugar Cupcake with Filling and Icing

Have your (cup)cake and eat it too! One frosted cupcake has only 17g total/added sugars.

Decrease Sugars

Reduce Calories
30% Reduced Sugar Cupcake with Filling and Icing

Solving the Problem / Addressing the Gap
Consumers today are looking for personalized nutrition, seeking out foods and beverages that contain the right mix of benefits and taste to help them look and feel good from the inside out—and desserts are no exception. These Reduced Sugar Iced Cupcakes are purposefully formulated to satisfy the sweet tooth without as much added sugar compared to traditional iced cupcake formulas.

Global Trend Alignment
Living Wellness

ADM understands these challenges and has assembled the industry’s most comprehensive ingredient portfolio to help you meet consumer demand. We’re at the ready to leverage our research-backed understanding of consumers’ expectations for taste and nutrition to help you deliver differentiated, delicious and personalized solutions that meet the needs of your brands and consumers.

Concept Highlights
- Overall sugar reduction: from 26g to 17g per cupcake
- Sweetness comparable to traditional sugar cupcake
- Minimal sweetness linger and no cooling effect
- 3g of dietary fiber per serving
- Light cake texture

Featured ADM Ingredients
- SweetRight™ Stevia RA80
- ADM Erythritol
- Fibersol®-2
- Natural Vanilla Flavor
- ADM Shortening 101-361
- ADM Tea Table Cake Flour
30% Reduced Sugar Cupcake with Filling and Icing

### Component

<table>
<thead>
<tr>
<th>Weight %</th>
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<tbody>
<tr>
<td>High Ratio Yellow Cake 33% Sugar Reduction</td>
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<tr>
<td>SweetRight™ Stevia-R80</td>
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<tr>
<td>ADM Sweetex® Cake and Icing Shortening</td>
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<td>Emulsips 110 – Palsgaard 97225</td>
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<td>Vanilla Extract</td>
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<table>
<thead>
<tr>
<th>Weight %</th>
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<tr>
<td>Orange Cupcake Icing Bimbo Reduced Sugar</td>
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<td>ADM Sweetex® Cake and Icing Shortening</td>
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<td>Water</td>
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**TOTAL** 100.0000

### Nutrition Facts

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<table>
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<tr>
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</tbody>
</table>

* The % Daily Value (DV) tells you how much a nutrient in a serving of food contributes to a daily diet. 2,000 calories a day is used for general nutrition advice.

**INGREDIENTS:** Sugars (Sugar), Shortening (Palm Oil, Mono and Diglycerides, Polysorbate 60), Water, Wheat Flour (Bleached and Enriched Wheat [Niacin, Reduced Iron, Thiamine Mononitrate, Riboflavin and Folic Acid]), Eggs, Erythritol, Soluble Corn Fiber, Orange Puree Concentrate, Maltodextrin, Nonfat Dry Milk, Whipping Agent (Starch, Polylglycerol Esters of Fatty Acids, Mono & Diglycerides of Fatty Acids), Baking Powder (Cornstarch, Sodium Bicarbonate, Sodium Aluminum Sulfate, Calcium Acid Phosphate), Soybean Oil, Vanilla Flavor, Salt, Natural Flavor, Stevia Leaf Extract.

**Allergen Statement:** Contains: Milk, Egg, Wheat
Bringing it all together

Consumers are looking for simple nutrition. Incorporating better nutrition doesn’t have to be hard.

With ADM’s ingredient portfolio and sweetener options, we can reach every type of consumer—from Dependocrats to Naturalists.

We have a solution!

Making it easier for people to make better choices.
(Three Key Takeaways)

Coming from Amy 5/6
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