


TATE & LYLE

EUROPEAN CONSUMERS' HEALTH AND SWEETENING HABITS

Selected Highlights





Tate & Lyle has a continuing commitment to driving value for our customers through unique insights into consumer attitudes and behaviour, as well as providing world-leading product development and manufacture.

As part of a continuous cycle of consumer research, in May of 2010 Tate & Lyle commissioned an independent research company, Illuminas, to conduct a significant quantitative study among European consumers. The goal was to assess current attitudes towards health and eating and how consumers' behaviour was influenced by these attitudes. The research particularly focused on whether consumers pay attention to the ingredients of the products they consume, and in particular their attitudes toward sweeteners.

This overview presents a sample of selected findings from the study. While individual country data was collected, the average scores for the five countries are shown for simplicity. In addition, for brevity some observations reflect only a portion of an entire question that was asked. Tate & Lyle has additional findings from this study which may be shared with customers as appropriate.

We at Tate & Lyle are pleased with the insights gained from this study and are happy to provide this abstract. It is our intent to continue to invest in understanding changing global consumer habits and attitudes, to better enable us to provide useful insights to our customers.

Want to know how consumers in your country have responded? Email enquiries@tateandlyle.com for the full report details.



A Majority of Europeans Pursue Healthy Habits

Like many consumers around the world, European consumers on average actively try to manage their health, with over half claiming to managing their weight and almost three quarters claiming to be following a balanced and healthy diet.

When looked at by country, however, it is clear that there are significant differences in how different nationalities pursue healthy lifestyles.

Do you, or anyone else in the household...

TRY TO MANAGE MY CURRENT WEIGHT	58%
FOLLOW A BALANCED AND HEALTHY DIET	72%

Base: all respondents

Most Europeans Read Package Labels But Not All Look at The Same Things

Consistent with an interest in managing their health, a majority of European consumers read ingredient labels or nutrition facts.

On average, half or more European consumers look at calories, sugar or fat, and almost half look at the ingredients list.

Consumers in different countries, however, demonstrate major differences in the level and nature of things they look for on labels.

When you are reading ingredients labels or nutrition facts (on the back or side of packaging), what do you usually look at?

LOOK FOR CALORIE COUNT	51%
LOOK FOR SUGAR CONTENT	53%
LOOK FOR FAT CONTENT	55%
READ INGREDIENT DECLARATION	46%

Base: all respondents

A Significant Percentage of Adults Restrict Certain Ingredients

Well over half of Europeans restrict intake of certain ingredients, including fat, sugar and salt. On an individual country basis there are some interesting differences.

For example, a significantly greater than average proportion of Italian consumers restrict intake of these ingredients; in the UK there is less prevalence of restrictions.

What types of food do you try to avoid, or at least cut back on, for your own personal health or safety?

FAT	66%
SUGAR	61%
SALT	53%

Base: all respondents

Europeans Generally Feel That Children's Products Contain Too Much Sugar

Not surprisingly, a large proportion of parents across Europe think that kids' products contain too much sugar. The figure is comparable among non-parent adults.

Reflecting an interest in managing their health, a majority of Europeans are interested in low calorie versions of food or drinks, provided they do not have any difference in taste or texture.

How much do you agree with the following statement:

I think kids' products often contain too much sugar	69%
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Base: all parents (1835)

I would be happy to buy low calorie versions of food or drinks if there was no difference in taste or texture	59%
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Base: all respondents (5031)



When Choosing Products For Children, Many Parents Select Lower Calorie Options

In separate comparisons, parents were shown the ingredients and nutritional information of two reduced-calorie formulas of a juice drink with a full-calorie version.

In both cases, parents convincingly preferred the reduced-calorie version over its full-calorie counterpart, at generally a 2-to-1 margin.

Below are ingredient labels for a fruit drink. Imagine you are in a store, buying a fruit drink for your oldest child (aged 15 or less). Look at the ingredient lists and nutrition facts below. Which one would you purchase for your oldest child?

NOTE: full ingredient listing and nutritional information shown in actual research

DRINK A

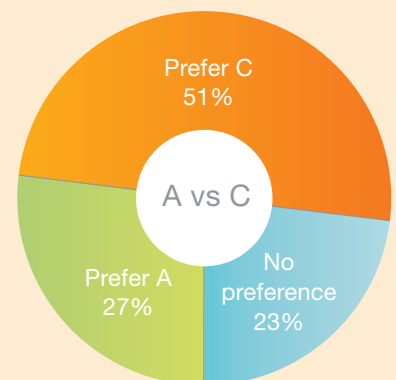
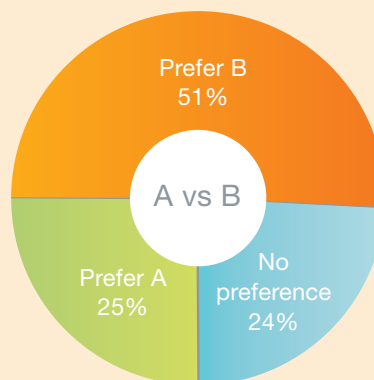
Full Sugar
169 kJ/100 ml
9.7g sugar
Sweetener – Sugar

DRINK B

Reduced Calories 1
111 kJ/100 ml
6.6g sugar
Sweetener – Sugar, sucralose

DRINK C

Reduced Calories 2
101 kJ/100 ml
5.6g sugar
Sweetener – Sugar, fructose, sucralose



Base: all parents

Research Approach

To best understand marketplace needs, an online quantitative study was conducted in May 2010, polling approximately 1000 consumers each in 5 European countries: UK, Germany, France, Italy and Spain.

	UK	Germany	France	Italy	Spain
TOTAL SAMPLE (Adults aged 18-64)	1001	1006	1002	1020	1002
TOTAL NO. OF PARENTS (with child aged 3-16)	401	431	389	332	282

- Each survey was conducted in each country's native language
- Opinions of parents were separately broken out
- Results are reported for the European average, with country detail for selected questions
- This report is a small sample of the research findings that are available



Tate & Lyle – helping to meet the needs of European consumers

Our research discovered that, overall, Europeans are increasingly aware that they can actively take part in managing their health. They show a growing interest in making smart decisions in food and beverage choices.

High on the list of consumer concerns is the level of sugar contained in products, both for adults and children. This is leading to consumers checking labels more frequently for ingredients and nutritional information.

Sucralose is a no-calorie sweetener that works both as a way to reduce sugar while retaining all the great sweet taste that consumers demand and as an alternative to current no-calorie sweeteners. Consumers find sucralose a very appealing sweetener in products for adults and children. It offers a valuable solution for manufacturers seeking to meet consumers' health needs while delivering excellent tasting products.

About Tate & Lyle

Established in 1865, Tate & Lyle is a world-leading manufacturer of renewable food and industrial ingredients. We use innovative technology to transform corn and sugar into value-added ingredients for customers in the food, beverage and pharmaceutical industry, among others.

Tate & Lyle is a leader in sweeteners, having discovered sucralose, and has developed expertise in starches, sugar refining, value-added food and industrial ingredients and citric acid. We maintain an investment in leading edge research, consumer insights and product development capabilities for our valued partners.

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