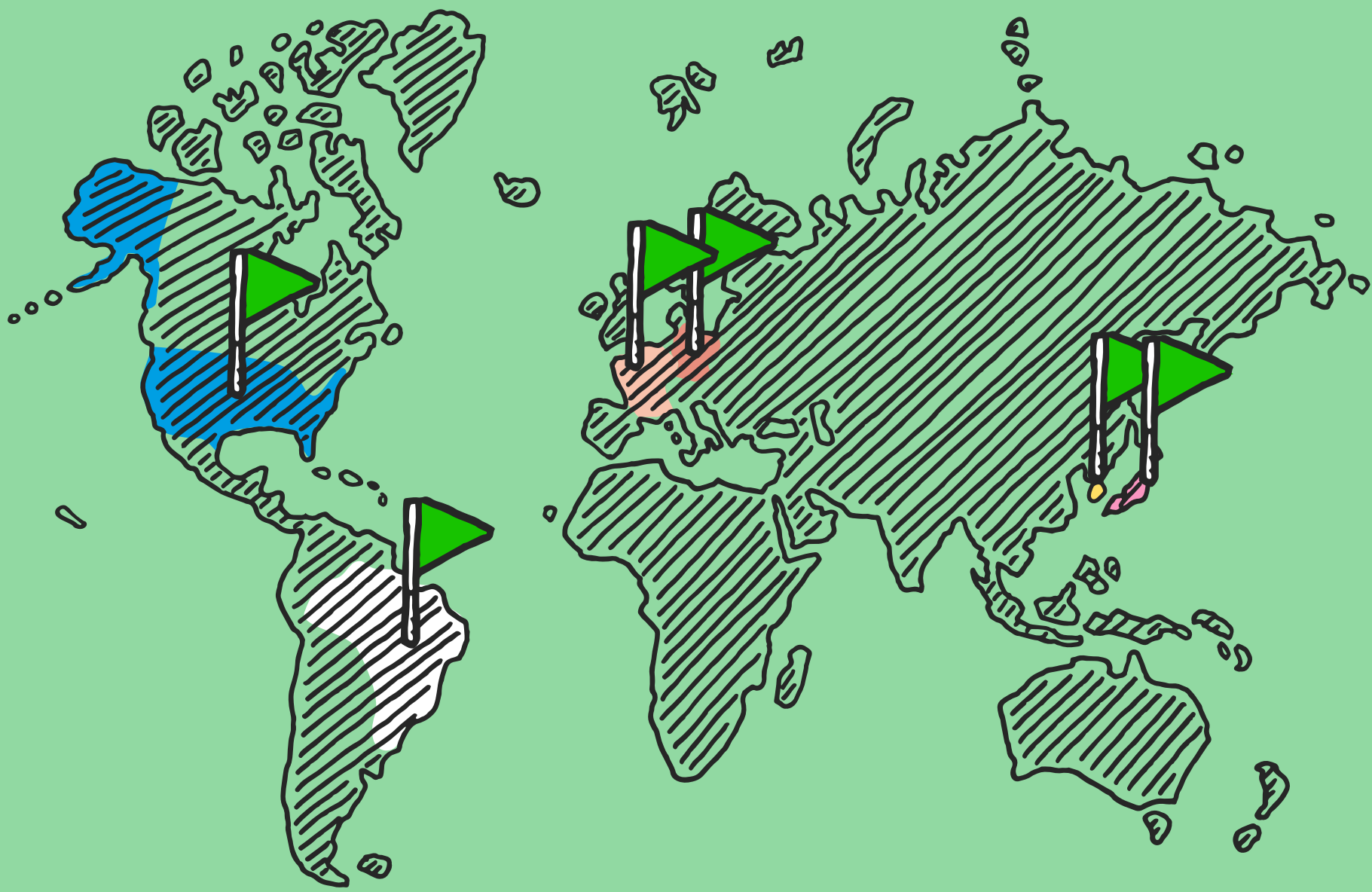
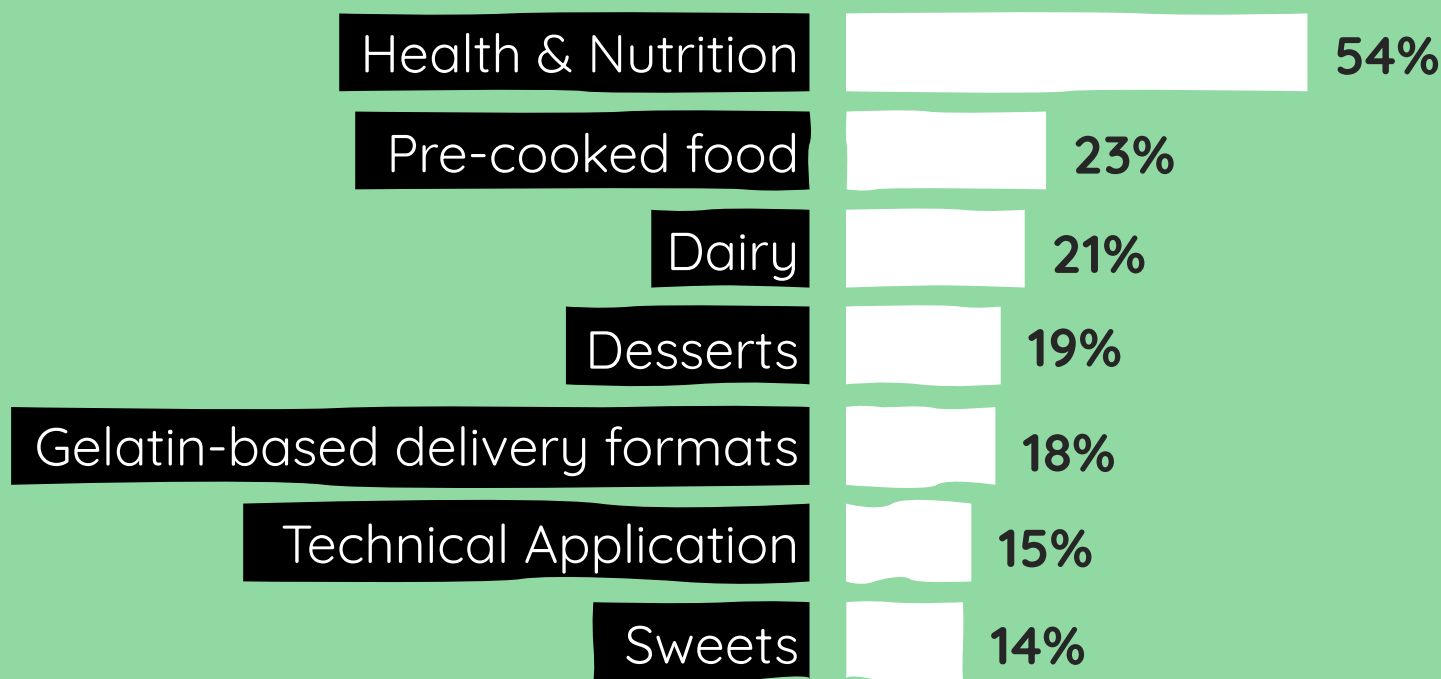


THE FUTURE OF GELATIN

AN INTERNATIONAL SURVEY BY GROW*



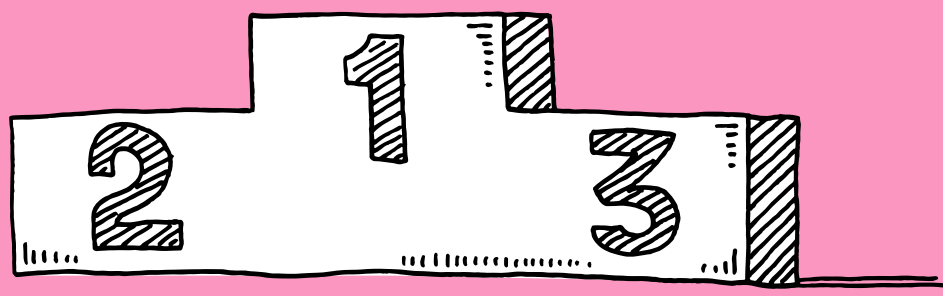
PRODUCT CATEGORIES PARTICIPANTS WORK IN:



HIGHLIGHTS OF THE SURVEY

GELATIN IS STRONGLY ASSOCIATED WITH:

(34%) UP-CYCLING
(42%) EASE OF USE
(29%) HEALTHY



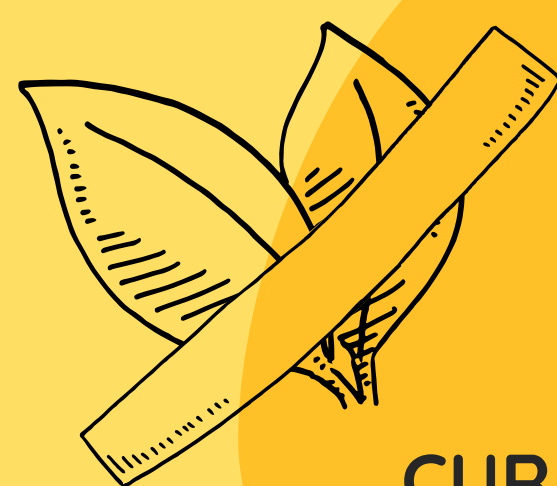
MOST IMPORTANT FACTORS OF GELATIN:

1 PRODUCT PERFORMANCE (40%)
2 LOW COST IN USE (34%)
3 RELIABILITY (32%)



79% OF THE PARTICIPANTS STATE THAT THEIR USE OF GELATIN HAS A POSITIVE IMPACT ON THE ENVIRONMENT.

32% USED TO WORK WITH ALTERNATIVES TO GELATIN,



BUT ONLY 29% CURRENTLY DO SO.

* 600 employees and managers (100 per country) who currently work or have worked with gelatin in their company were surveyed. All respondents live in one of the following six markets: USA, Brazil, France, Germany, Japan, and South Korea.