Dip into **America's Heart**

The Sabra-Obela Story
May 2014

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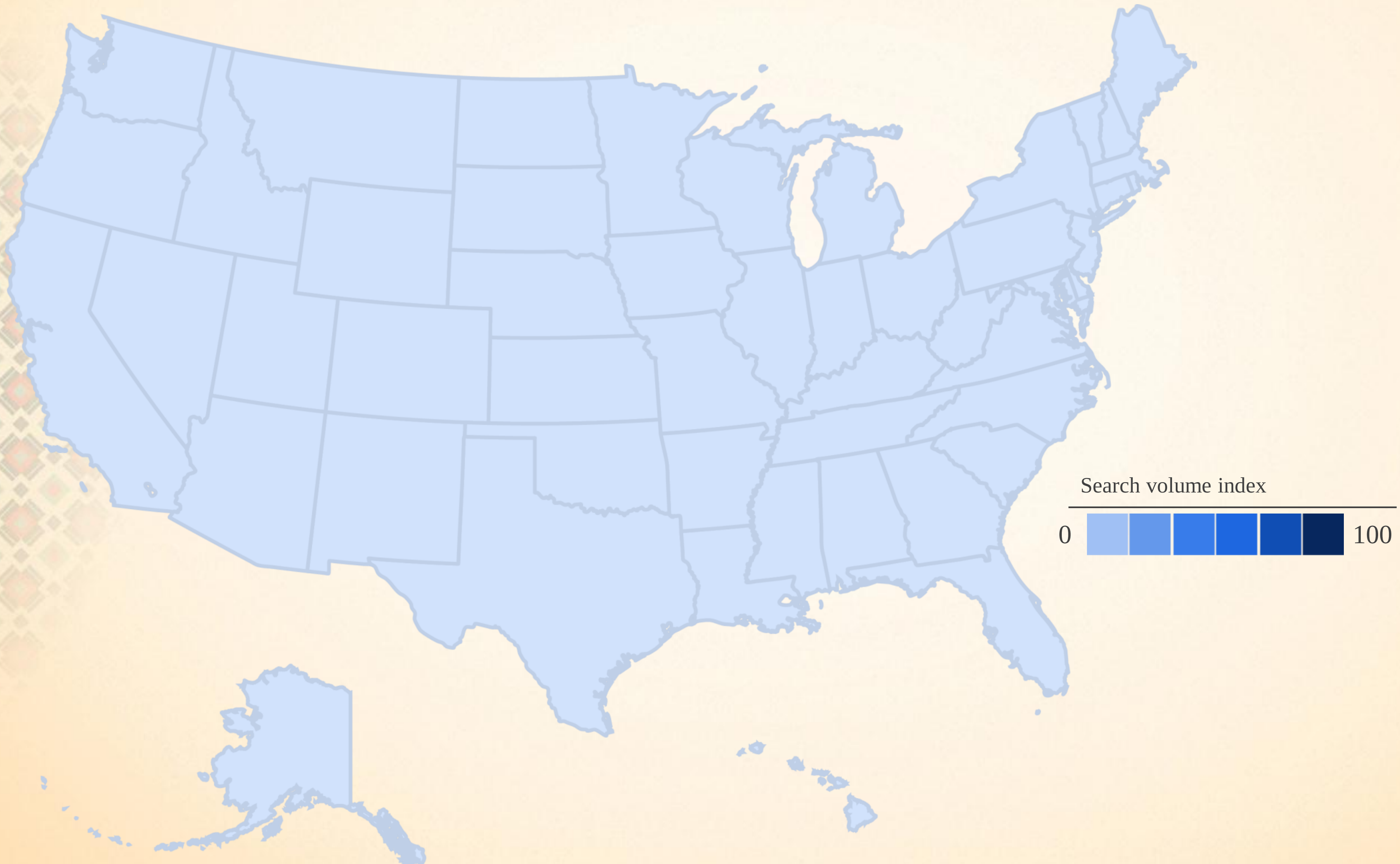
“Coca-Cola Has No Sabra Hummus, and That Is Really Unfortunate”

- The Street, April 2014, by Brian Sozzi, CEO of Belus Capital Advisors

Yet,

Until quite recently most Americans didn’t even know what hummus was…

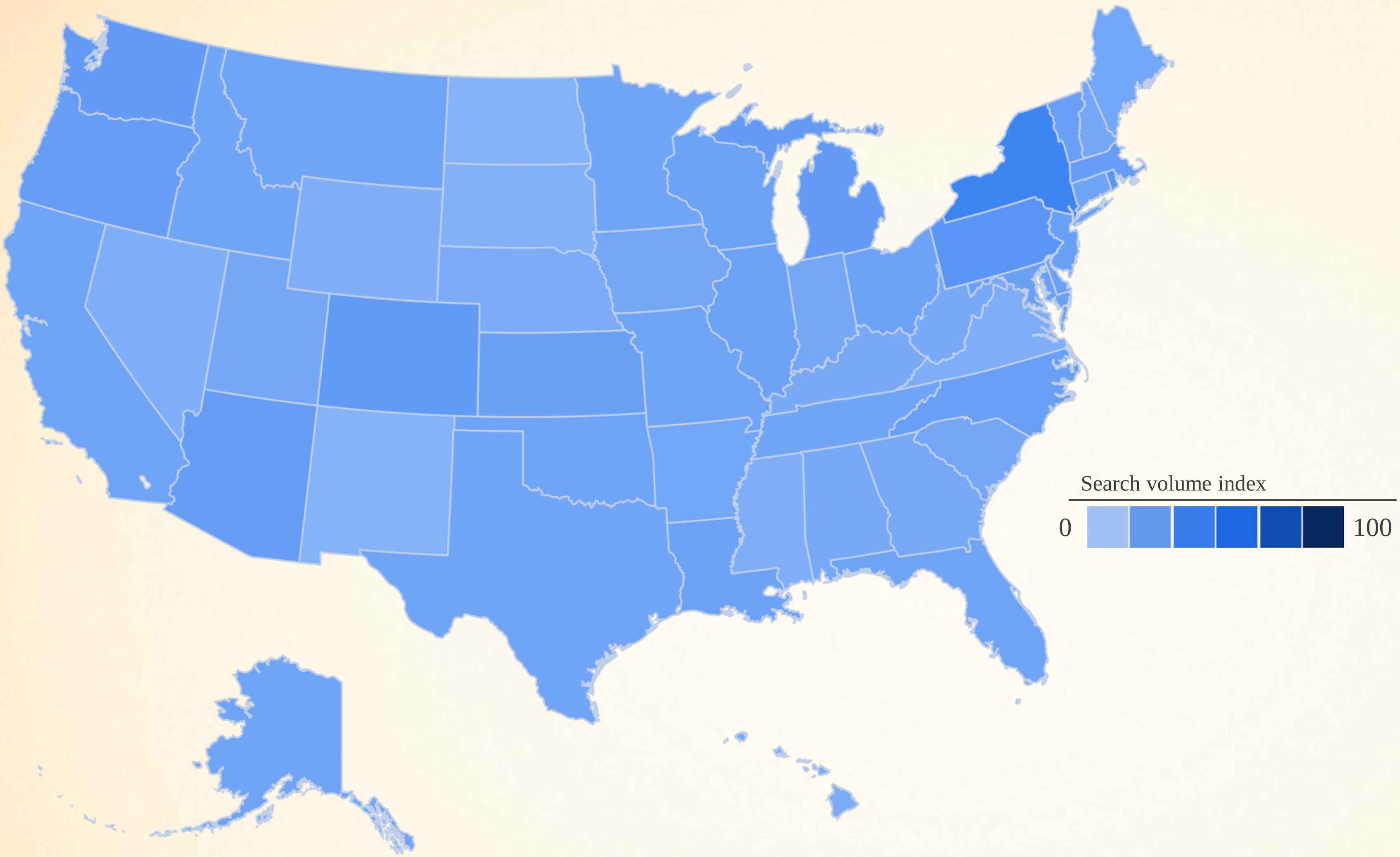
Google web search interest: Hummus - 2004



Source: Google Insights


Sabra
…And then came Sabra.

Google web search interest: Hummus - 2014



Source: Google Insights

American consumers fell in love with Sabra's products…

Cedric Craig @cedric_craig
@Sabra I would love to do all your social media in exchange for an endless supply of your hummus. Sounds like a win-win to me!

All around chickk @allaroundchickk
@Sabra hummus is my favorite!! They have 17 great glavors, not to mention they also make **salsa guacamole & veggie dips**

Cheryl Crow @Cheryl_Crow
OMG I just found out that @Sabra has guacamole!
So now I get great #Hummus and #Avocado to snack on!

Lesley Kat @lesleykat
Sabra is the best! mmmmmRT @belledujournyc: Having a love affair with celery and hummus right now…**but only the Sabra brand.**

Karen Michael **I am addicted to Sabra!!! It is a member of the food group…right???**

Source: Twitter, Facebook

America's pop culture icons are also totally obsessed with hummus…

Lady Gaga:

“I can't get enough of hummus.”

Natalie Portman:

“I consume my own weight in hummus every day.”

Katy Perry:

“I always must have fruit, granola and hummus backstage.”

Unprecedented 1st time Super Bowl performance

Deion Sanders

NFL Hall of Fame

Serena Williams

#1 ranked tennis player

… And even U.S. farmers:


How did it all
start?

Just like hummus, Sabra’s beginning was very humble.

The Sabra timeline from its early beginning to the FL - Strauss JV partnership

1986

Sabra manufactures hummus and salads to the **kosher market** in the NY area.

1994

Yehuda Pearl purchases 50% of the company. Yearly sales are USD 1MM.

Rabbi Yehuda Pearl

2005

Strauss takes hold

Strauss Group acquired 50% of Sabra for USD 8.8MM. Yearly sales grow to over USD 22MM. Expansion into mainstream retail market.

2007

Frito Lay joins in

Frito-Lay acquired 50% of Sabra.

Sabra gained an exceptionally powerful partner

PepsiCo is one of the world's leading food and beverage companies with over USD 65 billion in annual net revenue

22B USD 1 Bn. Brands

Over 40 USD 250MM-1B Brands

A strong joint venture was established

Strauss Group's and Frito-Lay's complementary capabilities enable Sabra's next big leap

Frito-Lay

-R&D
-Purchasing
-Insight / Marketing
-Customer relationships
-Transportation
-Food service
-Operational excellence

Strauss

-Manufacturing
-Experience and know-how in dairy and fresh food
-R&D
-IT

Our first challenge
was to decide:
where do we want to be?

Our Vision

SHARE THE WORLD

WE BELIEVE SHARING ENRICHES OUR WORLD

By participating & involving
Creating & celebrating

Sabra's story proved to be a success story…

The success of Sabra in the U.S. was a real inspiration and so in 2011, Sabra further expanded into Canada and Obela was formed. We began producing fresh dips in Canada, Mexico and Australia, making the beginning of a new era.

Sabra board members and executive team

Board members

Ofra Strauss - Chairperson of Strauss Group
Giyora Bar-Dea - Deputy CEO of Strauss Group,
Former CEO of Obela

Dave Rader - Chairman of the Sabra Board
Daniel Naor - SVP and GM of Growth Ventures

Exec. team

Ronen Zohar - CEO
Erik Martinoli - CFO
John McGuckin - EVP of Sales
Tulin Tuzel - CTO
Meiky Tollman –
VP of Growth & Capabilities
Frank Armetta -
VP of Supply Chain
Shali Shalit - CMO
Paul Parker - VP of HR

Obela board members and executive team

Board members

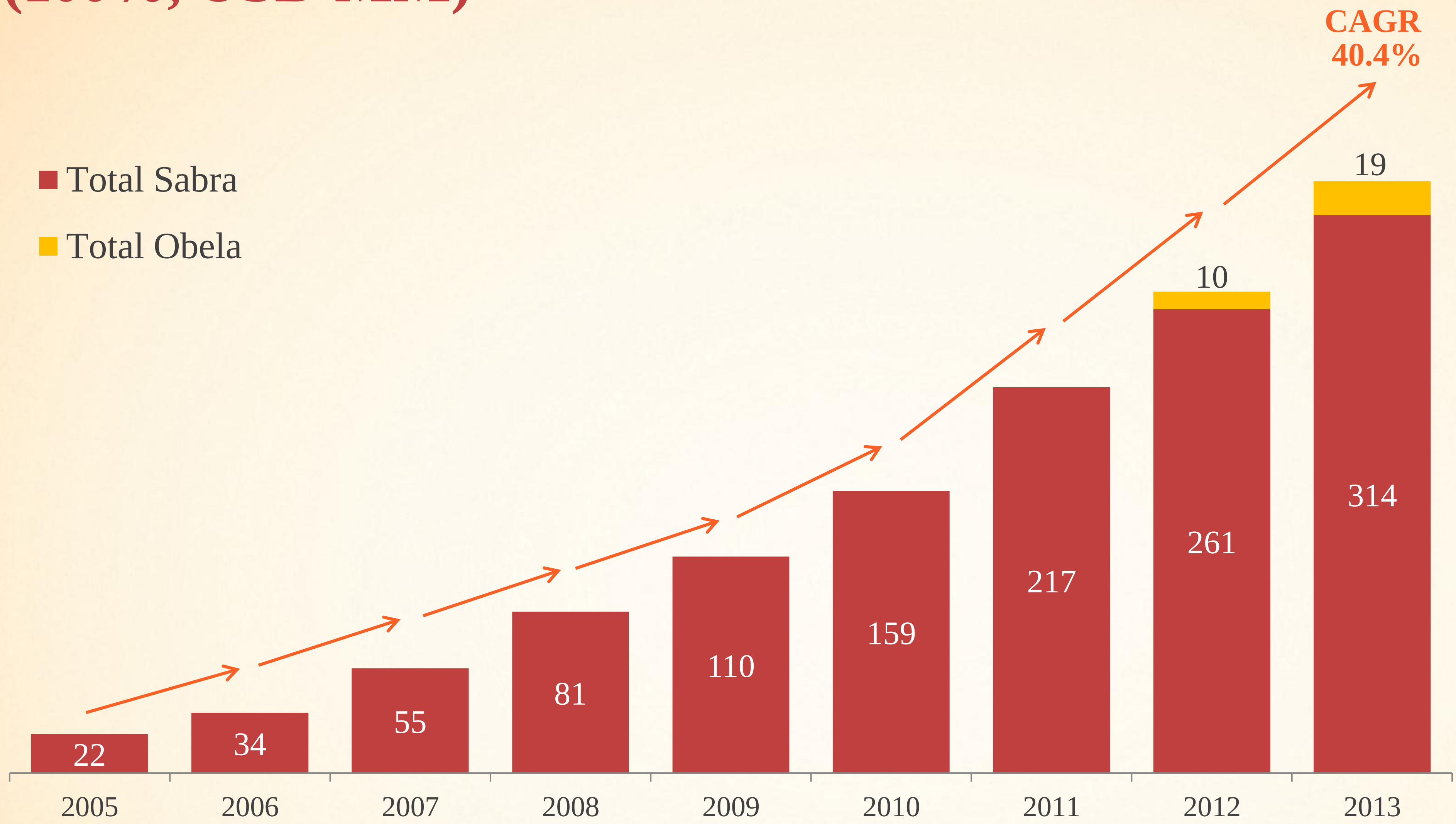
Ofra Strauss – Chairperson of Strauss Group
Gadi Lesin - President & CEO of Strauss Group
Giyora Bar-Dea - Deputy CEO of Strauss Group, Former CEO of Obela

Nick Hampton - Senior Vice President, Strategy, Change and Transformation for Europe, and President of the Western Europe Region - Chairman of Obela board
Pedro Padierno - President of PepsiCo Mexico
Maria Sharpe - Chief personnel officer, PepsiCo Europe Sector

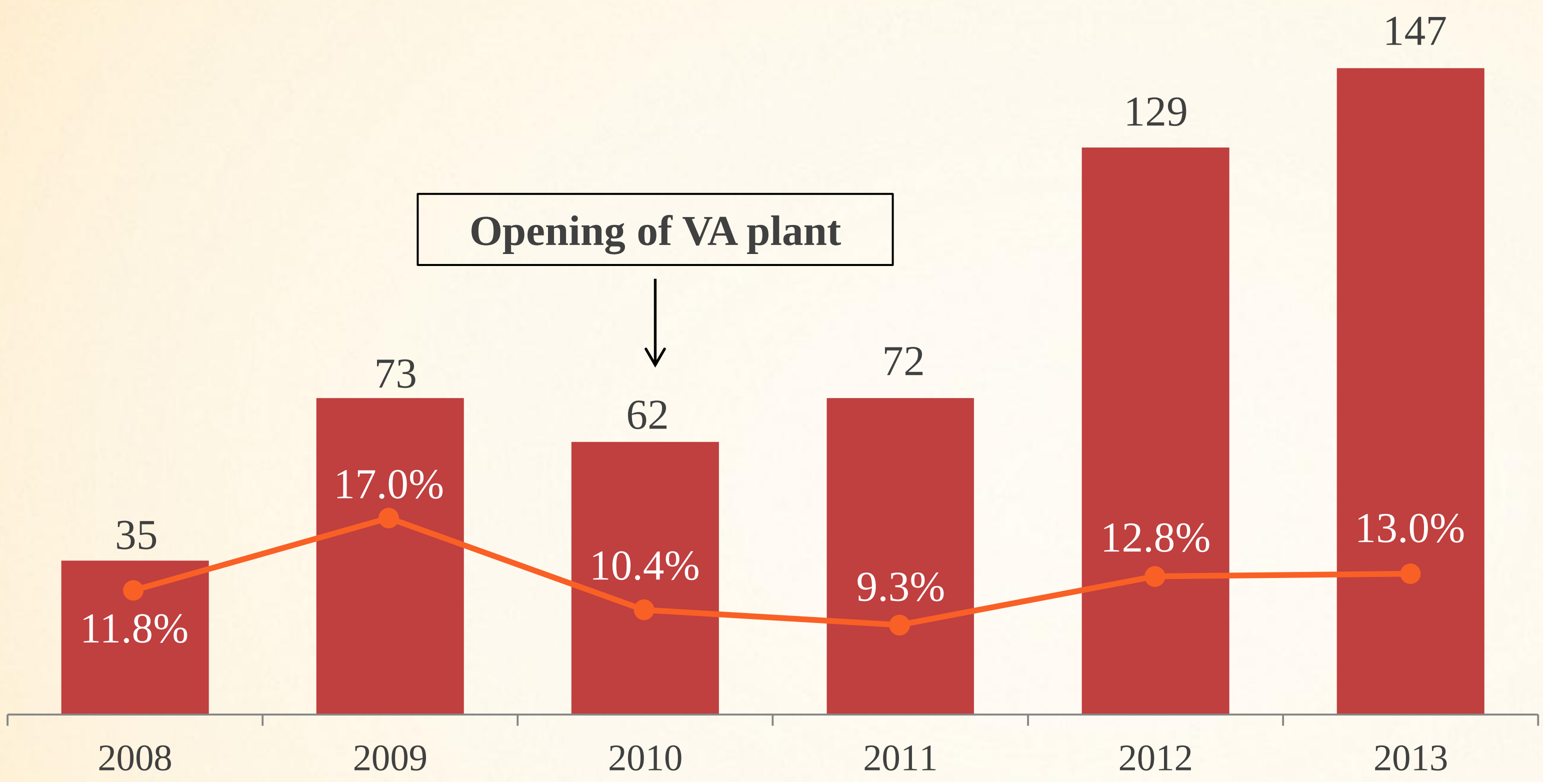
Exec. team

Ronen Zohar - CEO
ERIK Martinoli - CFO
John McGuckin – EVP of Sales
Tulin Tuzel - CTO
Meiky Tollman - VP of Growth & Capabilities
Frank Armetta - VP of Supply Chain
Shali Shalit - CMO
Paul Parker - VP of HR

Total Sabra & Obela Net Sales (100%, USD MM)

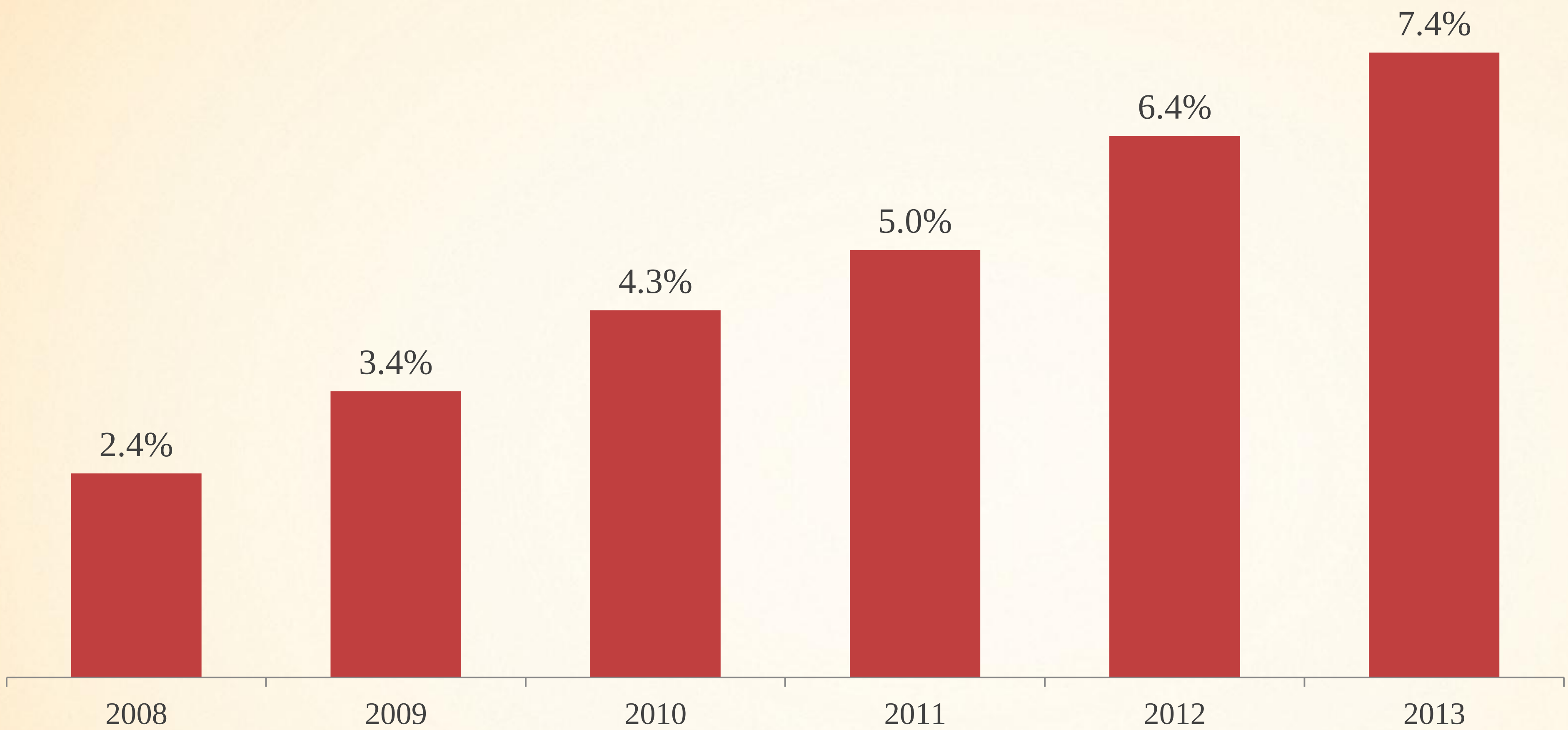


Sabra EBIT & EBIT margins (100%, NIS MM)



Sabra & Obela are key growth engines for Strauss Group

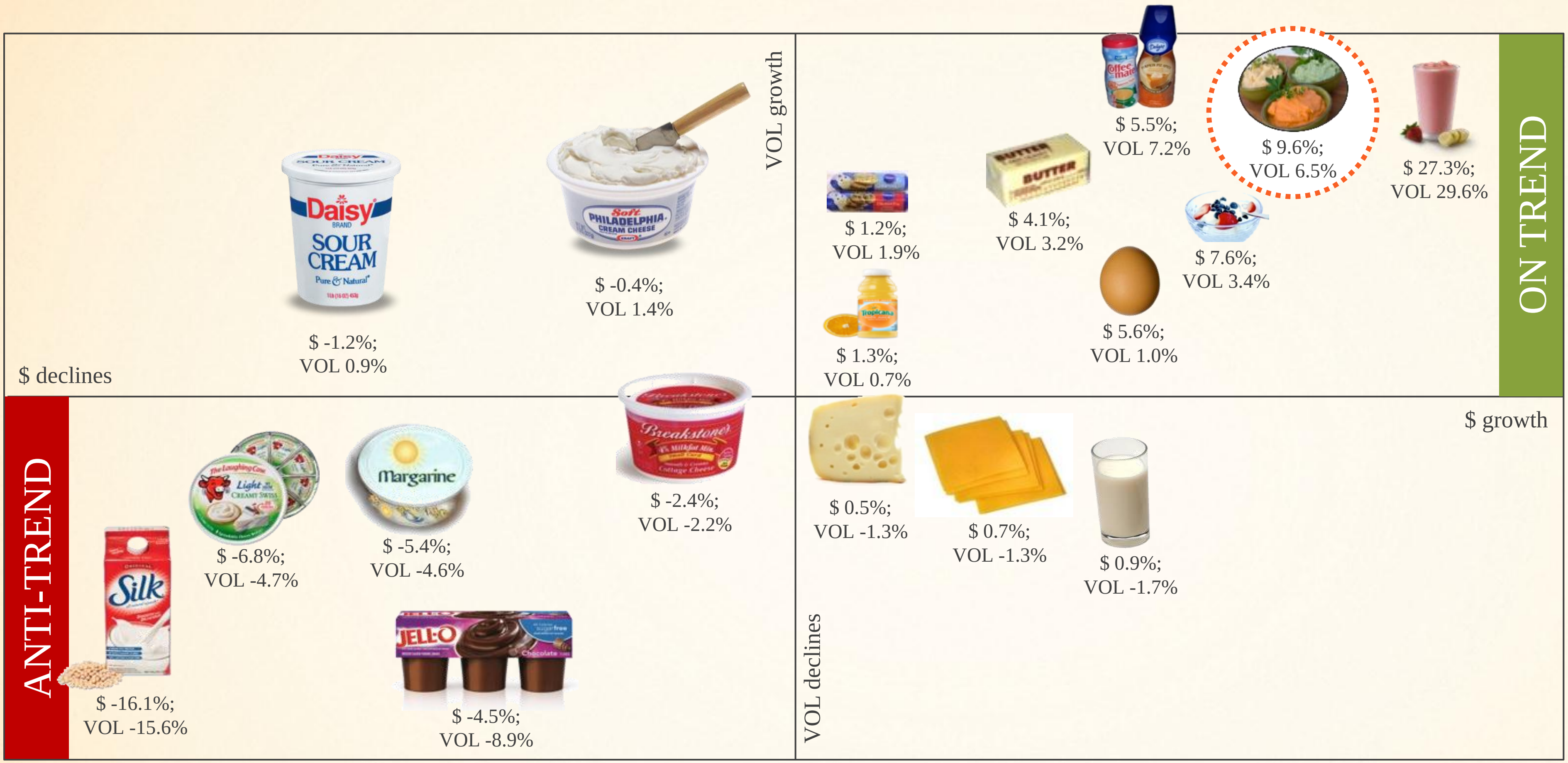
Sabra and Obela net sales (50% share) out of total Strauss group net sales



How did we do it?

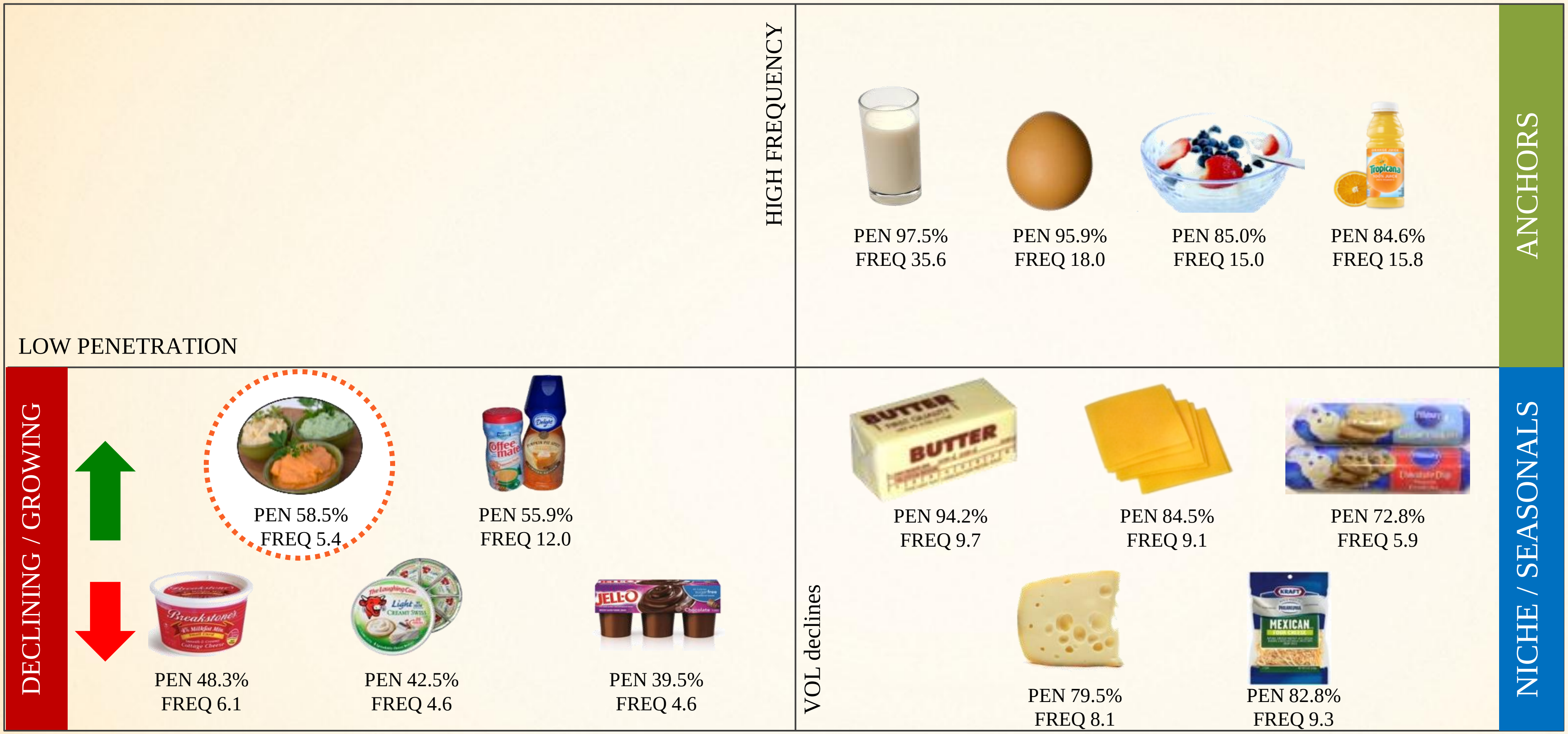
Sabra US market

Sabra has staked its claim in the Fresh Dips category which is on trend and growing faster than most other food categories



Source: IRI InfoScan Total US Muli-Outlet includes Food, Drug, Mass, BJ's and Sam's Club; Latest 52 Weeks ending 10/27/13

There is still plenty of room to grow in the category given its current low penetration and frequency

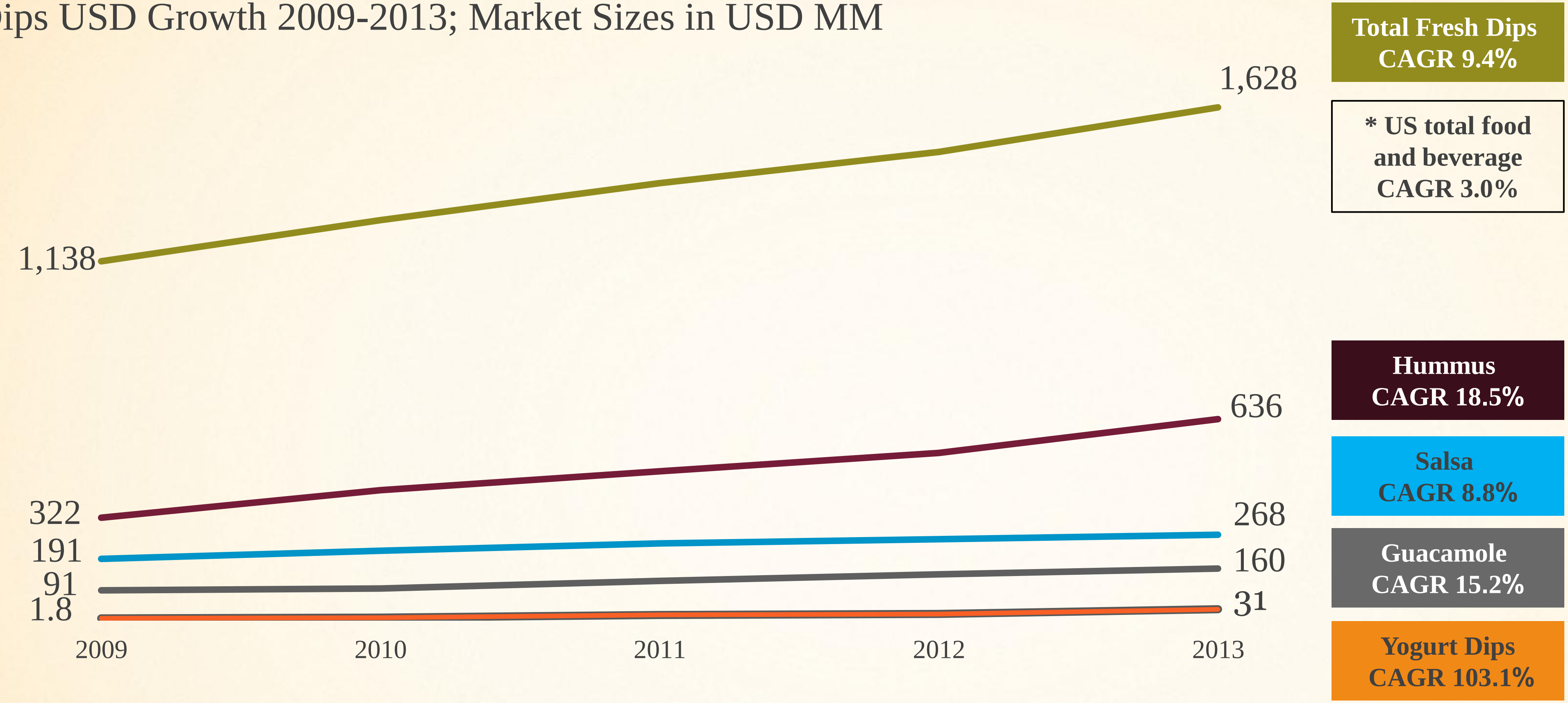


Source: IRI InfoScan Total US Muli-Outlet includes Food, Drug, Mass, BJ's and Sam's Club; Latest 52 Weeks ending 10/27/13

Fresh Dips in the US projected to reach USD 3B by 2020*

Anchored by strong hummus, with all other Sabra categories also driving growth

Dips USD Growth 2009-2013; Market Sizes in USD MM



Source: IRI (data in Retail Selling Price), Infoscan MULOC, 2009-2013
* Internal Sabra estimates

Sabra is the leading brand in the US fresh dips market and the only cross-category brand

Total Fresh Dips Category 2013

	Hummus	Salsa	Guacamole	Yogurt Dip	Other	Total Fresh Dip
Others, Market Share	11.2%	Others 34.4%	Others 10% PL 9.8% Deans 4.9% Ventura 3%	Others 8.7% PL 7.4% Cedars 6.8% Others 10%	Others 6% Cheese 9% Sour Cream 32%	All Others*** 43.6%
PL, Market Share	8.3%	PL 24%	Calvio 7.1%	Fresh Foods 13.4%		Ventura 4%
Athenos, Market Share	4.6%		Yucatan 11.3%	Marzetti 21.4%		Wholly 4.7% Marzetti 5.3%
Cedars, Market Share	4.5%		Wholly 42.7%		All Others 53%	PL 15.9%
Tribe, Market Share	7.7%	Rojos 4.3% Italian Rose 8.7% La Mexicana 8.9% Garden Fresh 12.3%		Dannone 32.2%		
Sabra, Market Share ($, USD MM)	**63.7%, $405**	**7.4%, $19.8**	**11.2%**	**10.1%**		**27.5%, $448**
Category USD MM	$636	$268	$160	$30.6	$533.4	$1,628
Category % of Fresh Dips	39.0%	16.5%	9.8%	1.9%	32.8%	100%
Growth vs 2012	+23.0%	+4.9%	+13%	+93%	-2.4%	+9.4%
Sabra vs 2012	+25.7%	-3.3%	+186%	+145%	na	+26.7%

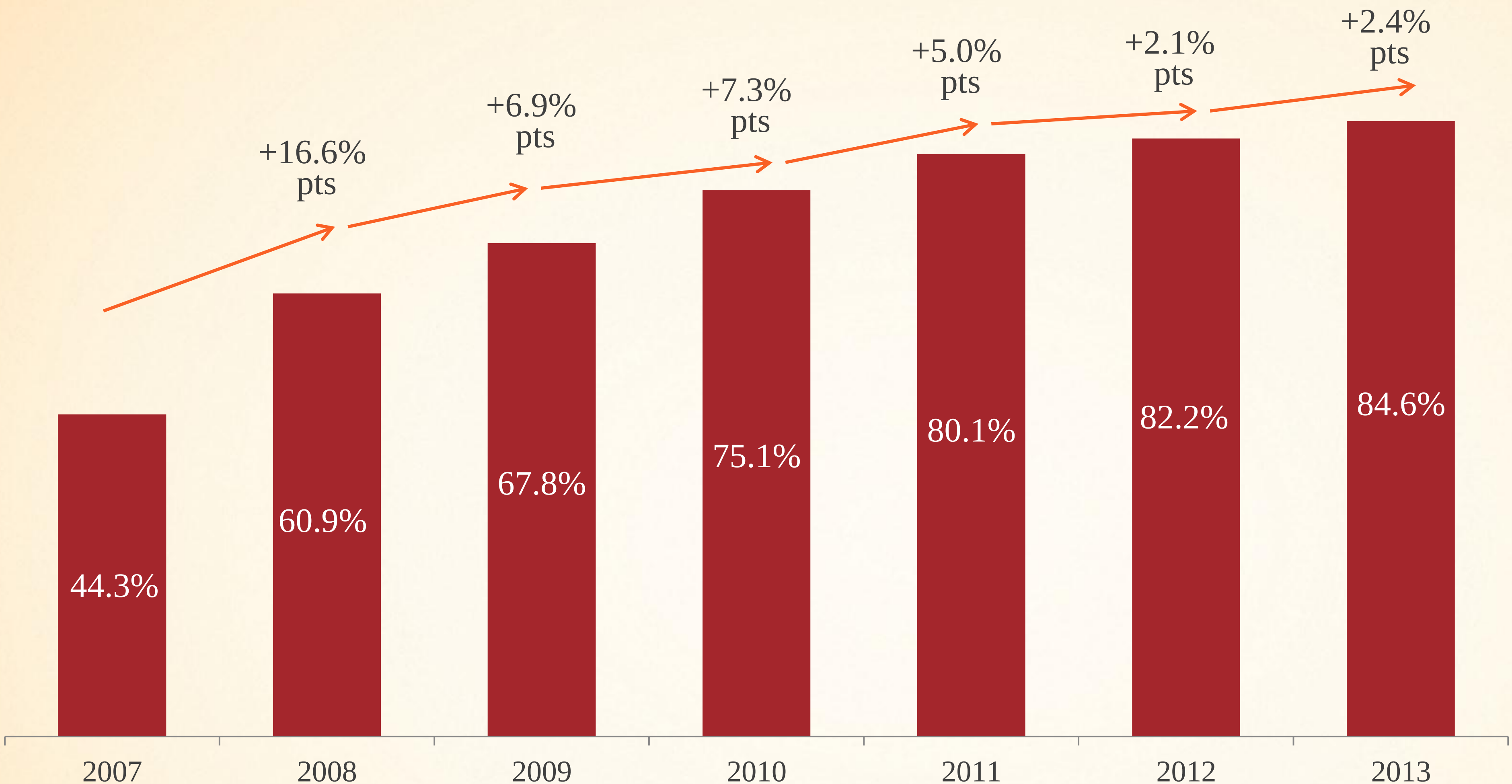
Source: IRI (Data in Retail Selling Prices), Sabra Custom Dips Database; Total US Muli-Outlet includes Food, Drug, Mass, BJ's and Sam's Club; Latest 52 Weeks ending 12/29/13

**All Other includes Sour Cream, Cheese, and other spreads $521,391

Hummus

Sabra's initial challenge was to increase hummus distribution

Hummus ACV*



Source: IRI

* ACV - All-commodity volume

Sabra is the nationwide hummus brand

Source: Internal Sabra estimates

Sabra hummus is sold in more than 27,000 clubs and supermarkets nationwide

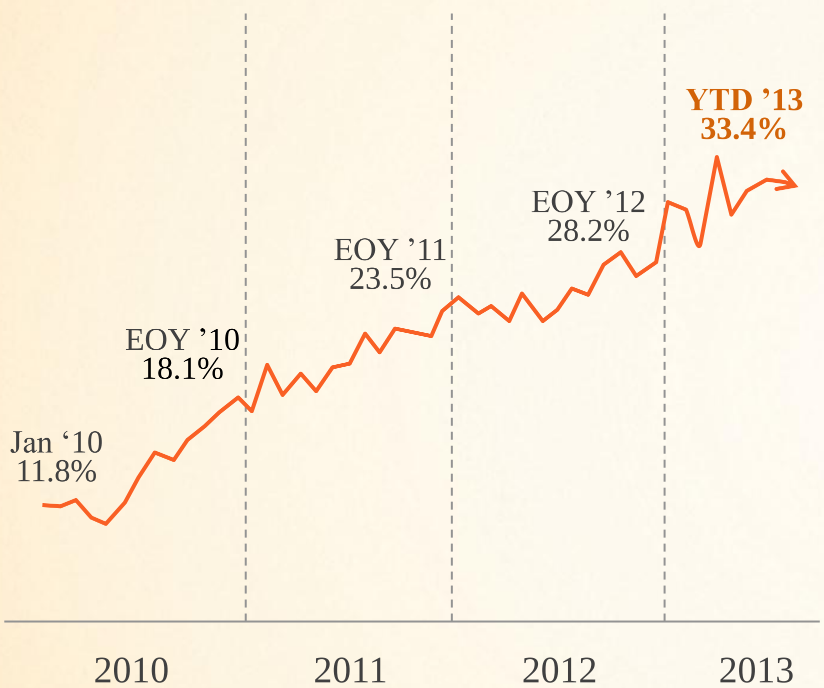
	Total No. of stores	No. of Stores Selling Sabra Hummus	Hummus Dollar Share	No. of Authorizes SKUs
Costco Wholesale	453	453	N/A	8
Publix	1,074	1,074	79.9	18
Kroger	2,352	2,316	63.8	19
Walmart	4,042	3,820	66.2	12
Safeway	1,337	1,333	70.4	15
Ahold	764	764	52.3	21
Sam's Club	610	609	100.0	7
Target	1,784	1,499	71.8	14
ShopRite	256	255	63.4	32
Delhaize	1,508	1,439	56.7	18
BJ's	200	200	83.5	6
Supervalu	1,766	1,373	50.7	22
A&P	286	286	70.8	22
Bi-Lo	692	689	69.9	13

	Total No. of stores	No. of Stores Selling Sabra Hummus	Hummus Dollar Share	No. of Authorizes SKUs
Harris Teeter	219	218	45.5	7
Giant Eagle	230	218	57.5	16
Roundy's	162	161	59.9	14
HyVee	214	197	52.7	16
Price Chopper	132	131	50.5	18
Big Y	60	60	58.9	22
Albertsons	189	189	72.8	22
Raley's	119	119	62.1	8
Schnucks	100	99	58.0	11
Save Mart Supermarkets	224	219	73.2	6
Weis	164	160	78.9	12
DOT	420	420	N/A	13
Other	14,272	9,192		

Source: IRI, LD 52 w/e 4/20/14

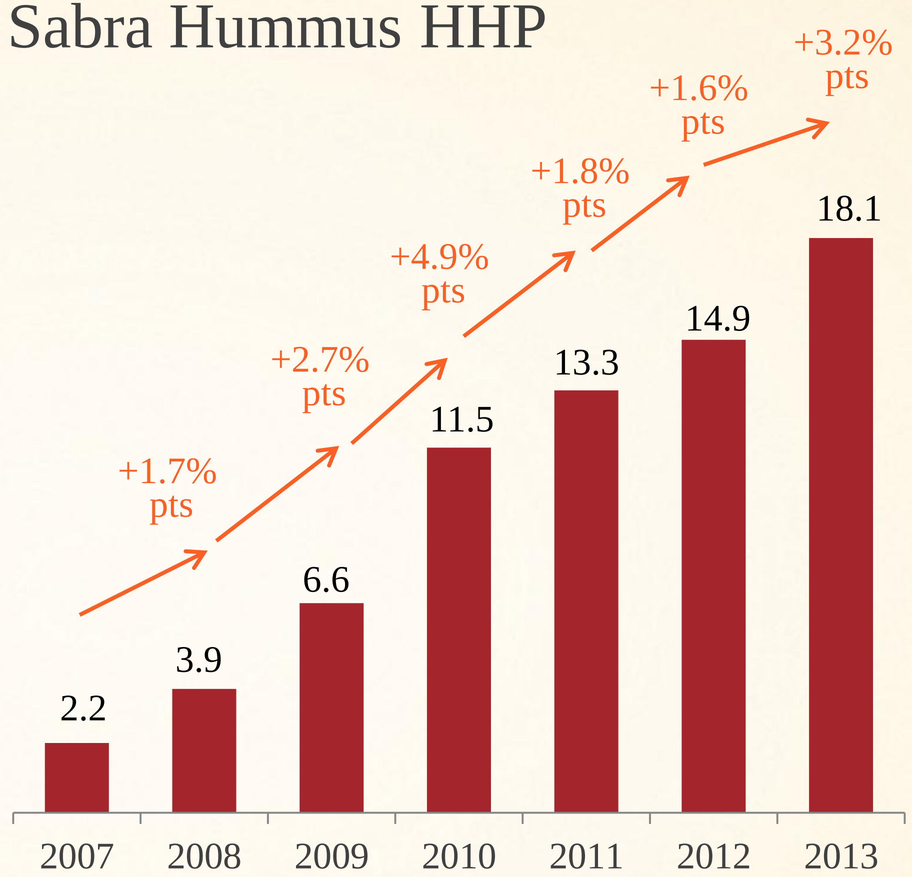
Sabra's next key challenge was to grow awareness and hummus HHP

Sabra hummus awareness



Source: Sabra BHT 2010-2013

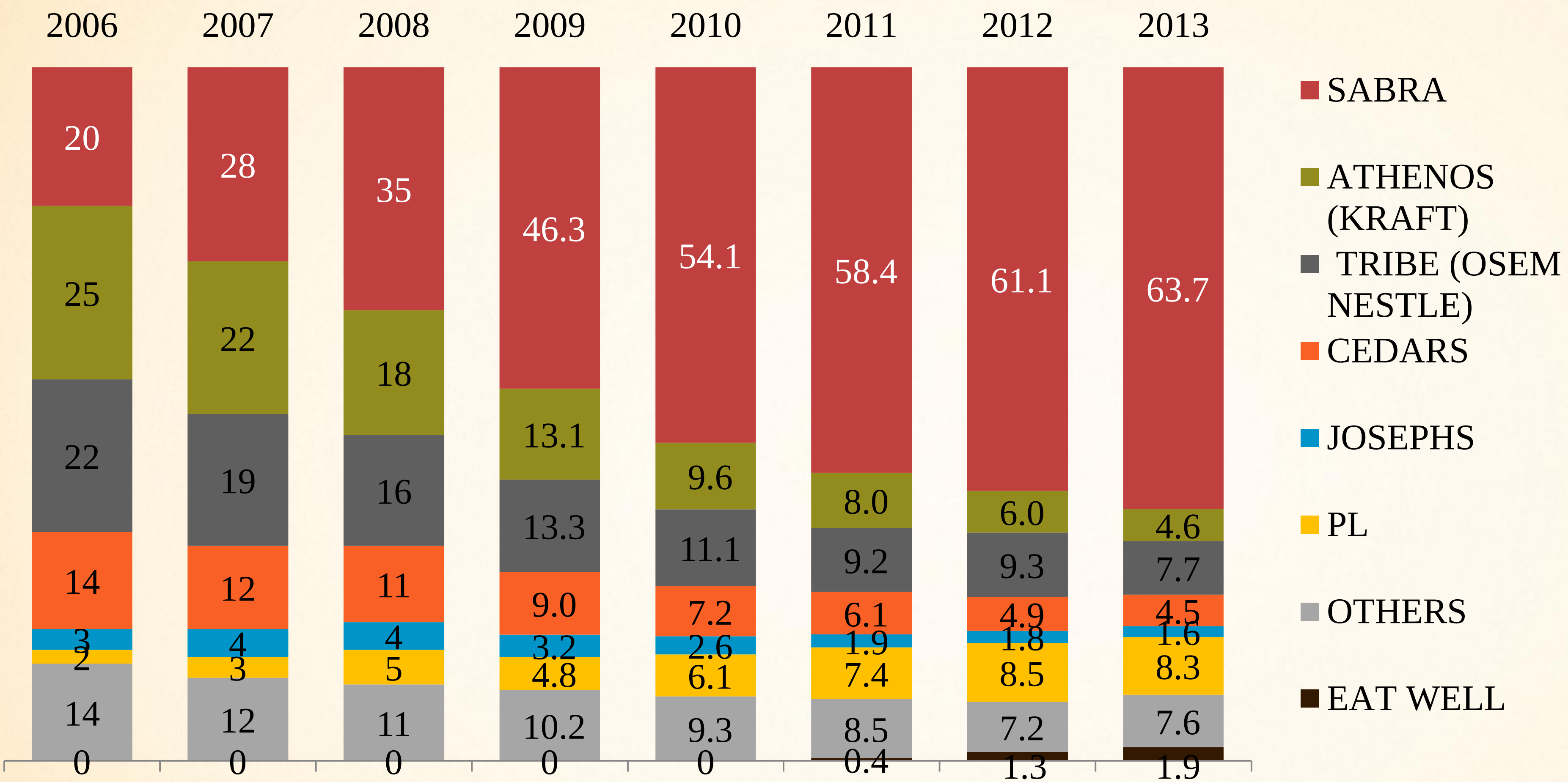
Sabra Hummus HHP



Source: IRI

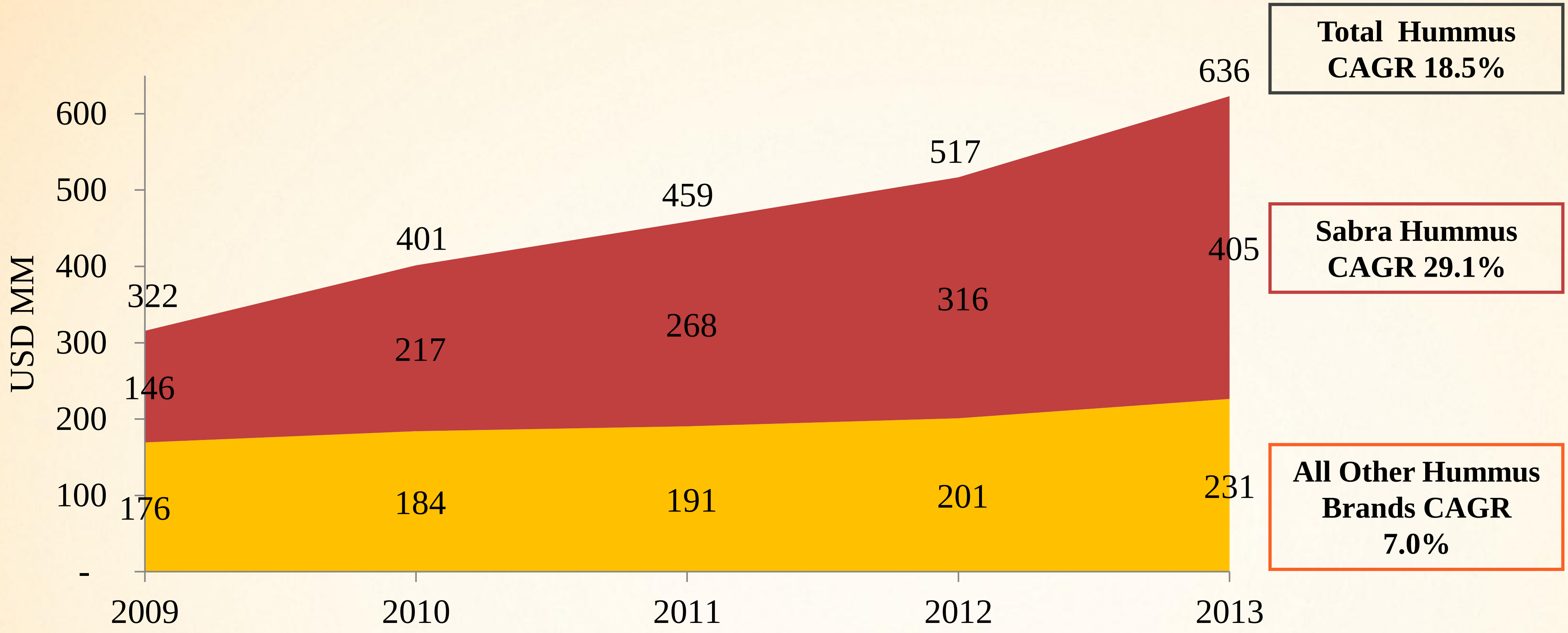
The result:
Sabra Becomes the clear #1 breaking away from competitors

Hummus share trends 2006-2013 L52W* (% USD Sales)



Note: Market shares may not sum up to 100.0% due to roundings.

Moreover, Sabra is the driving force behind the remarkable growth of the hummus category



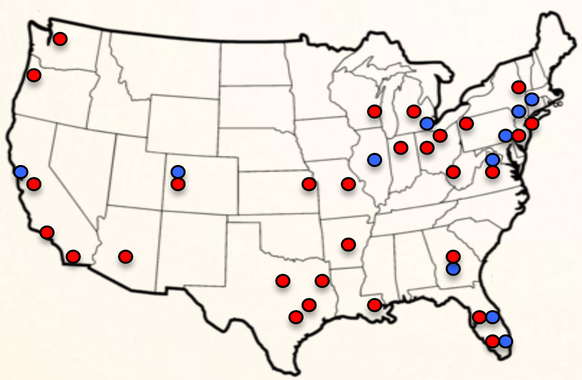
Source: IRI (data in Retail Selling Prices), Sabra Custom Dips Database; Total US Muli-Outlet includes Food, Drug, Mass, BJ's and Sam's Club; Latest 52 Weeks ending 12/29/13, Data in retail selling prices.

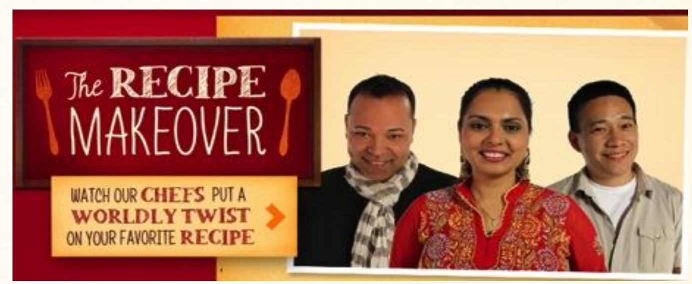
2008-2012 Marketing
Nationwide street sampling

2008-2010: 2 Million Samples, 11 Markets

2011-2012: Sampling via Multiple Gourmet Food Trucks
28 Markets, 1,500 Activation Days, 12 Million Samples

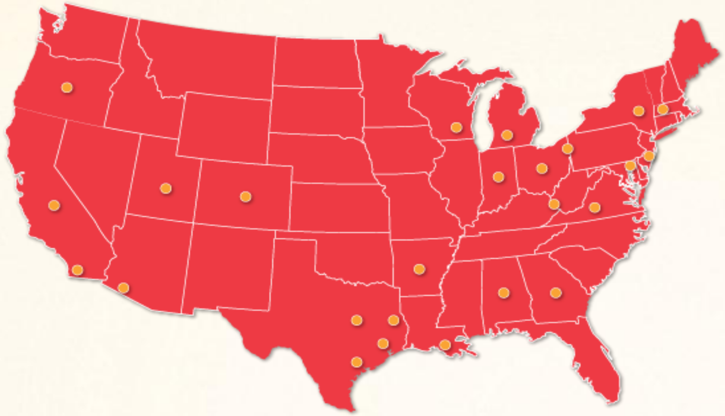
Support activities: Regional TV & Radio and Online Loyalty Program

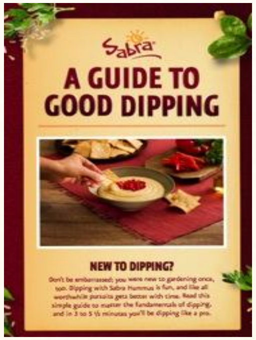




2013 Marketing|National 360^{0} Campaign

- National Dip Life to the Fullest TV (16 weeks)
- Streaming, SEO ,Facebook, Twitter, Instagram & Website
- Sampling via Multiple Gourmet Food Trucks & in store with retailers 25 Markets, 700 Activation Days, 6 Million Samples






BLUE Basics™
Limited-Ingredient Formula
BlueBasics.com
Also Available For Cats

The potential is still huge…

More households

Households Penetration	
~120M Household IN US	**% Change 2013 vs. 2012**
21.9M HH buying Sabra Hummus	+21.8%
18.1% HH of total US	+3.2ppt

Buying more often

Frequency (Trip per Sabra Hummus HH)	
~120M Household IN US	**% Change 2013 vs. 2012**
90.2M trips to purchase Sabra Hummus	+25.9%
4.12 Avg Trips/Household per year	+3.4%

And adding more units per trip

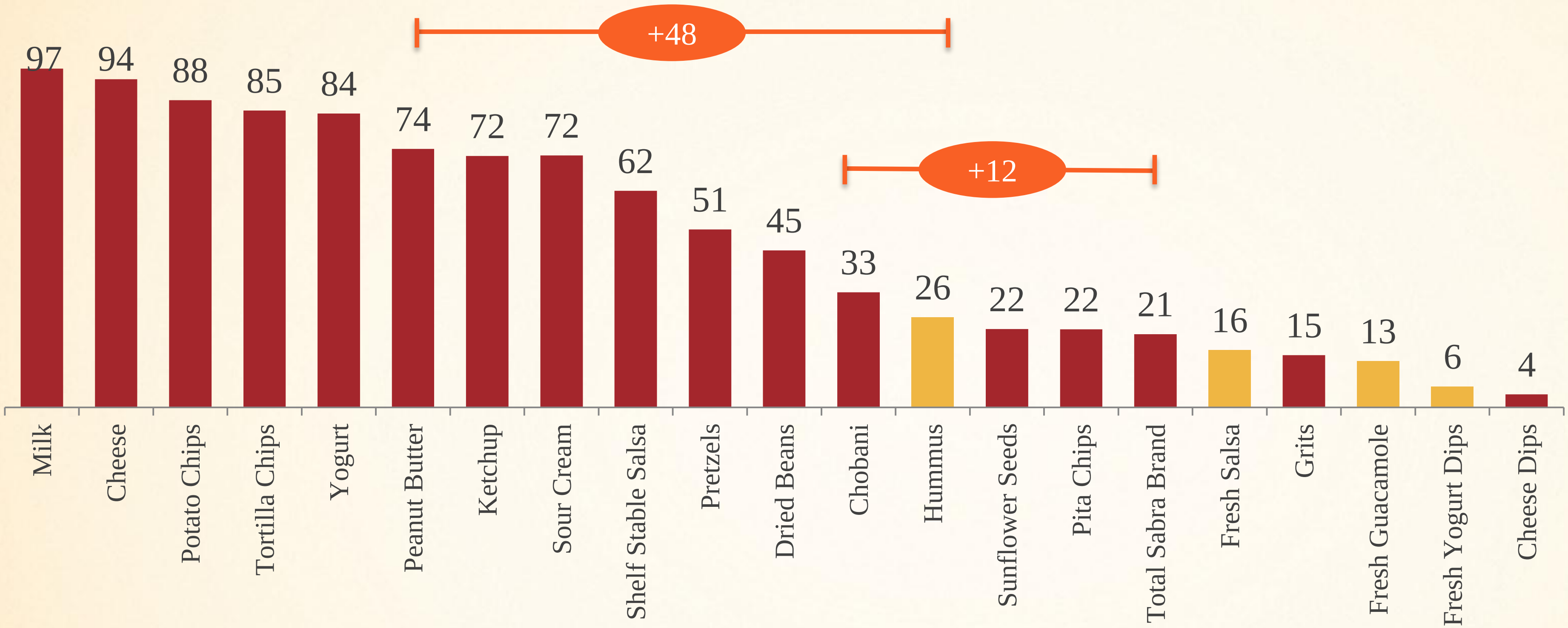
Purchase Size/Trip	% Change 2013 vs. 2012
$5.01 avg spent per trip	-0.6%
1.3 units purchases per trip	+2.9%
0.5 Kg purchases per trip	0.2%

Source: IRI Panel data. US- ALL OUTLETS, 52 weeks ending Dec 29, 2013
Notes: IRI Panel data covers all channels, including clubs, Walmart, etc. Data in retail selling prices.

Sabra - Hummus still holds substantial potential in the US…

When compared with other categories in the US, Sabra has the potential to grow HHPs of fresh dips category significantly

Annual Percent HH Penetration



Continued penetration gains can drive category growth for many years

Source: IRI, LD Panel 52 w/e 4/20/14

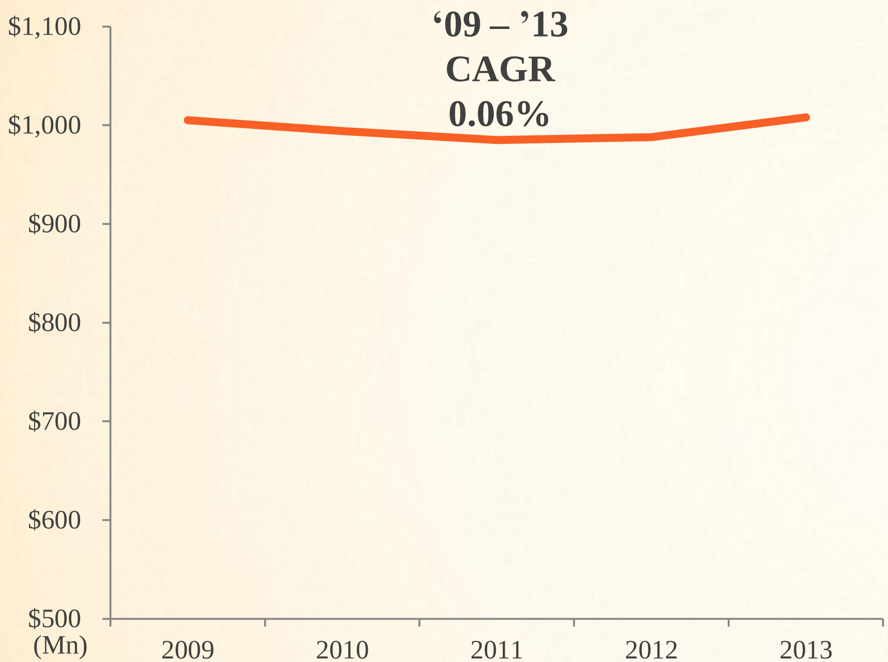
Salsa

Fresh Salsa is the US Fresh Dips market's second largest category –

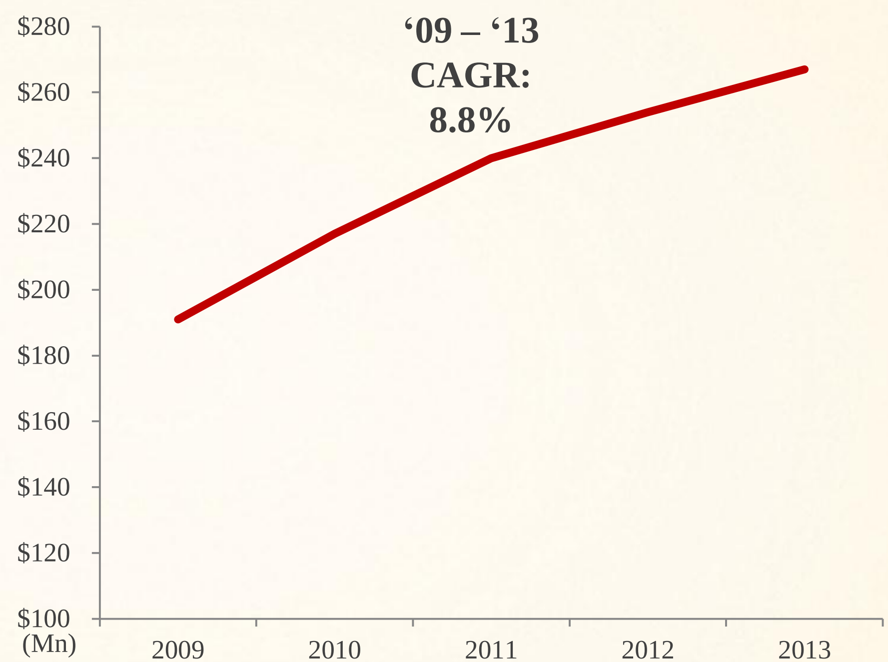
Fresh Salsa's growth well outpacing Jarred as shoppers trade up to fresh from Shelf-stable alternatives

Fresh Salsa sales 2009-2013 (USD MM)

Jarred Salsa



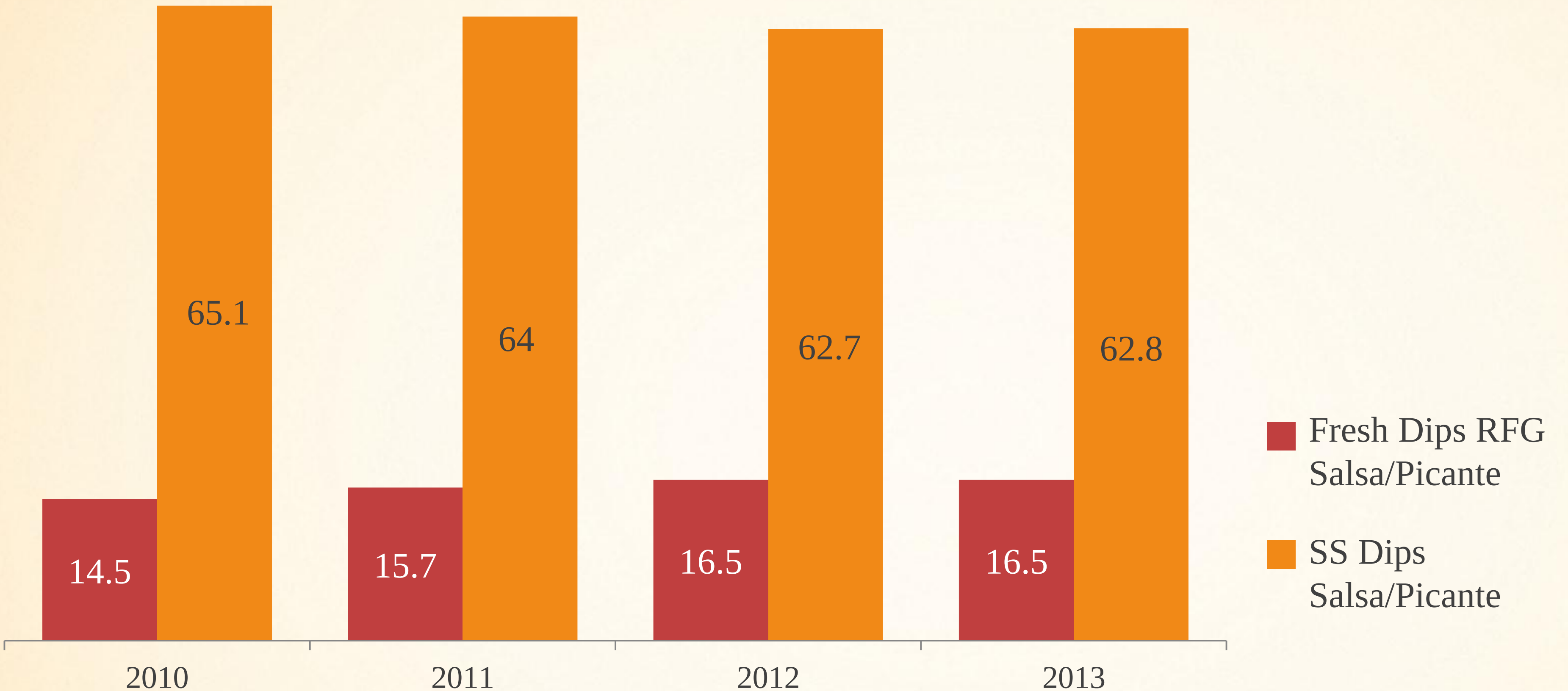
Fresh Salsa



Source: IRI (data in Retail Selling Prices), Total MultiOutlet-Dollar Sales, Data in retail selling prices.

Salsa awareness is impressive 90%; however, Fresh Salsa's HHP rate is still low compared to Shelf-stable salsa

Household penetration (Total US, MultiOutlet)

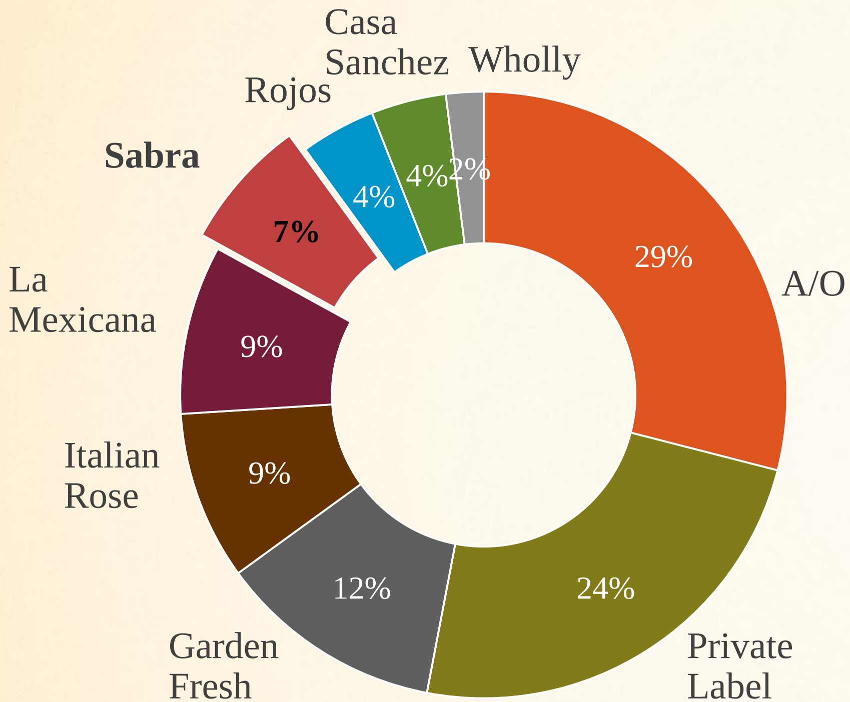


Source: IRI.

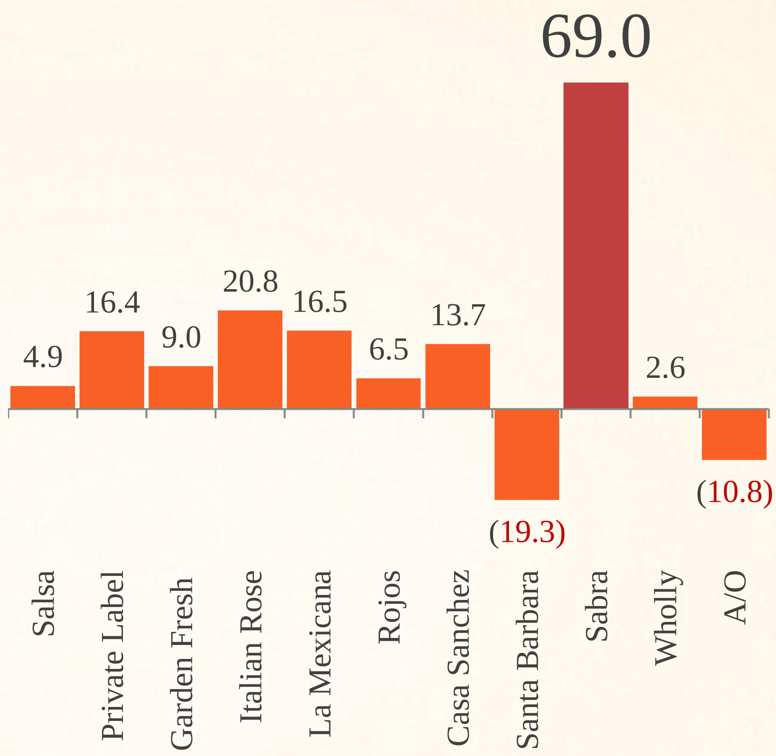
Sabra salsa leads fresh category growth

Annual Salsa Brands 2013

Sales: USD 268 MM



% USD Growth 2013 vs. 2012



Source: IRI (data in Retail Selling Prices), LD Total US Multi-Outlet 52 w/e 12/29/13, Data in retail selling prices.

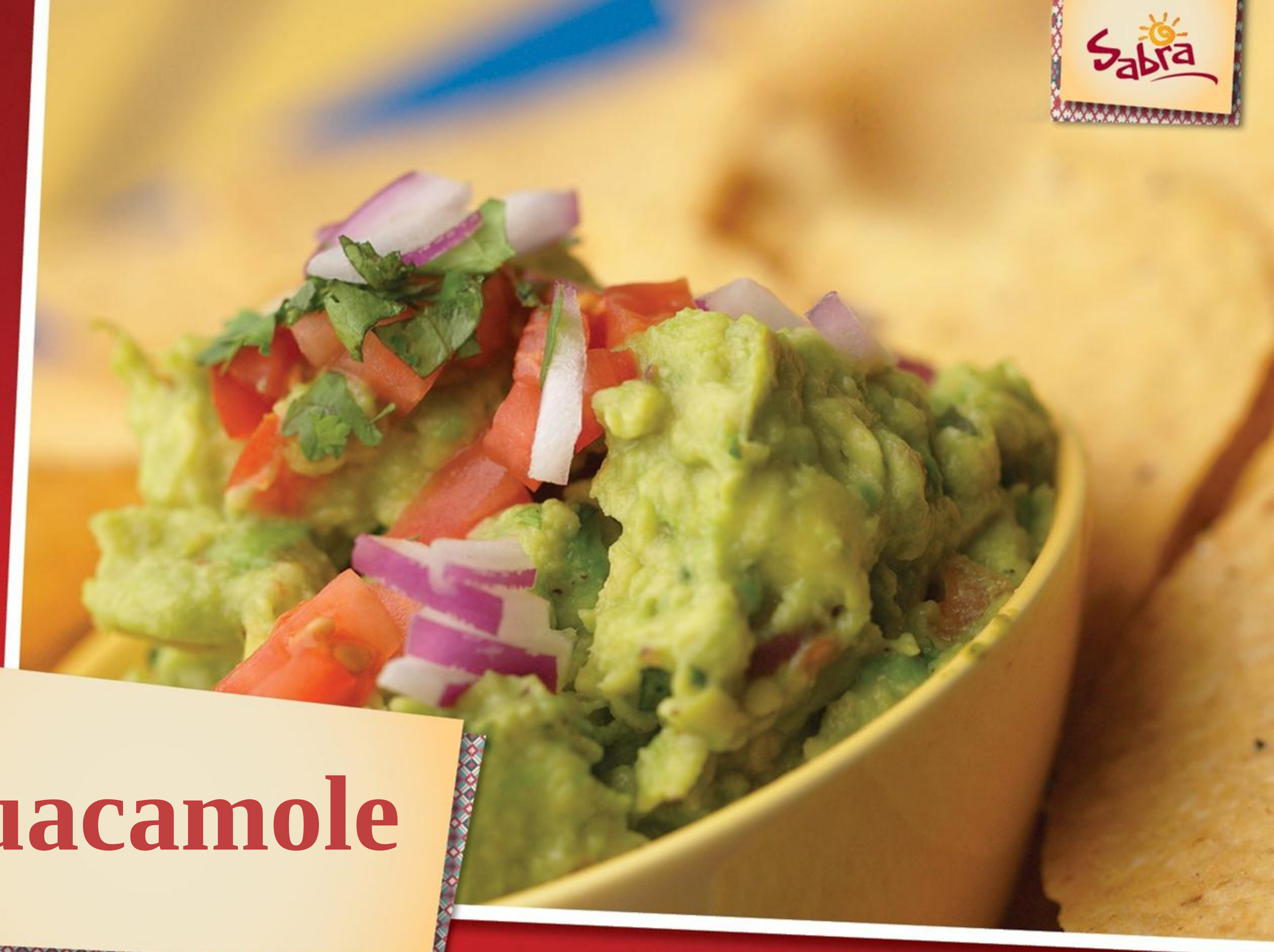
Packaging & product finalized gaining both customer and consumer accolades

Best-tasting fresh Salsa made with the freshest, regionally picked vegetables and simple ingredients.

Retail

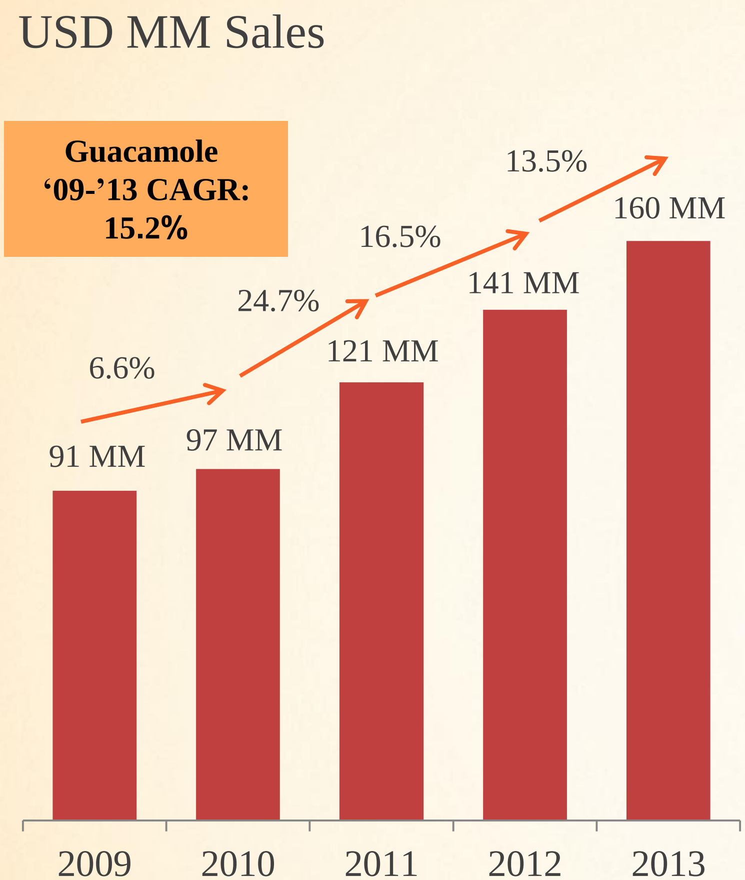
Club

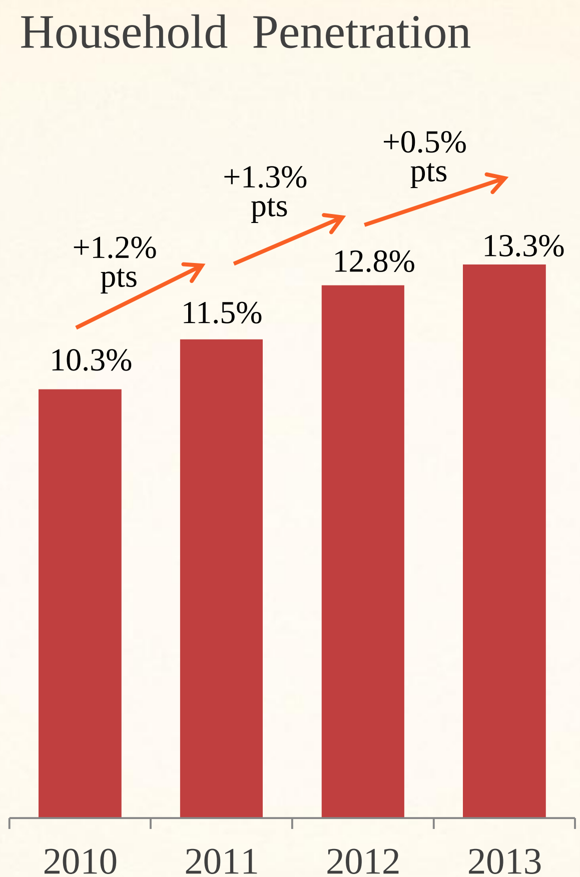
On-the-Go/Away from Home



Guacamole

The guacamole category is on the rise, growing by more than 75% in the past 4 years, while the HHP rate has increased by over 29%

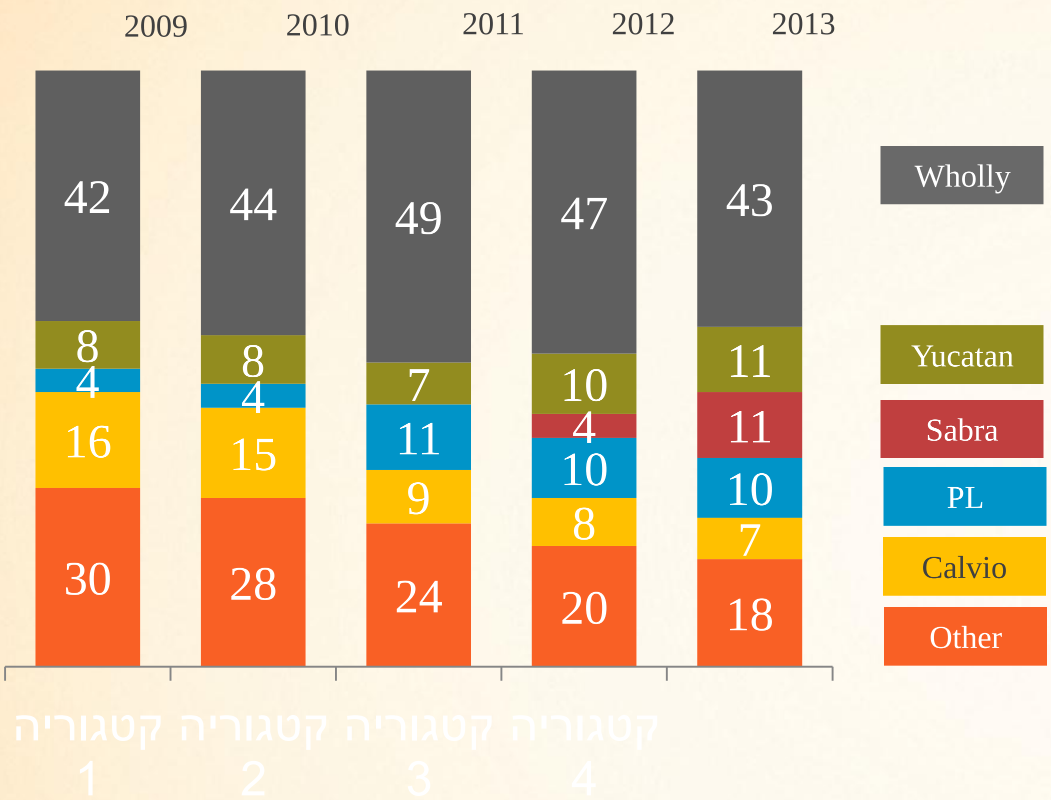




Source: IRI (data in Retail Selling Prices).

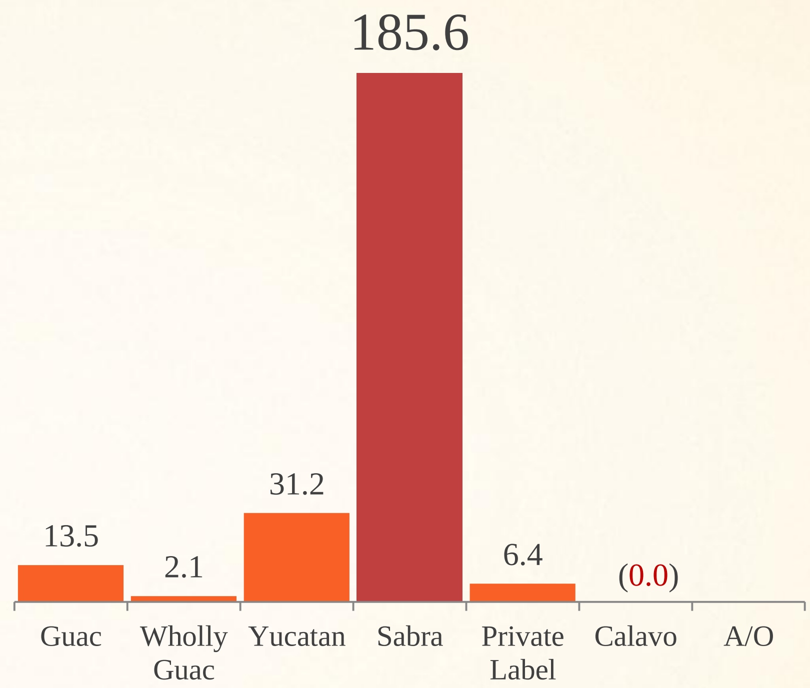
Sabra leads growth in the guacamole category and within 2 full years becomes the #2 in the category

Guacamole Market Share 2009-2013 (USD MM)



Source: IRI (data in retail selling prices).

% USD Growth 2013 vs. 2012



Source: IRI, LD Total US Multi-Outlet 52 w/e 12/29/13

Sabra’s guacamole dips - guacamole made fresh from Mexican-grown avocados

Operational Excellence and Manufacturing Facilities in the US

Sabra - the world's largest hummus plant in Virginia

- Plant I 2009- 2014
- Center of Excellence 2012- 2013
- Plant II 2014-2015

Additional sites:

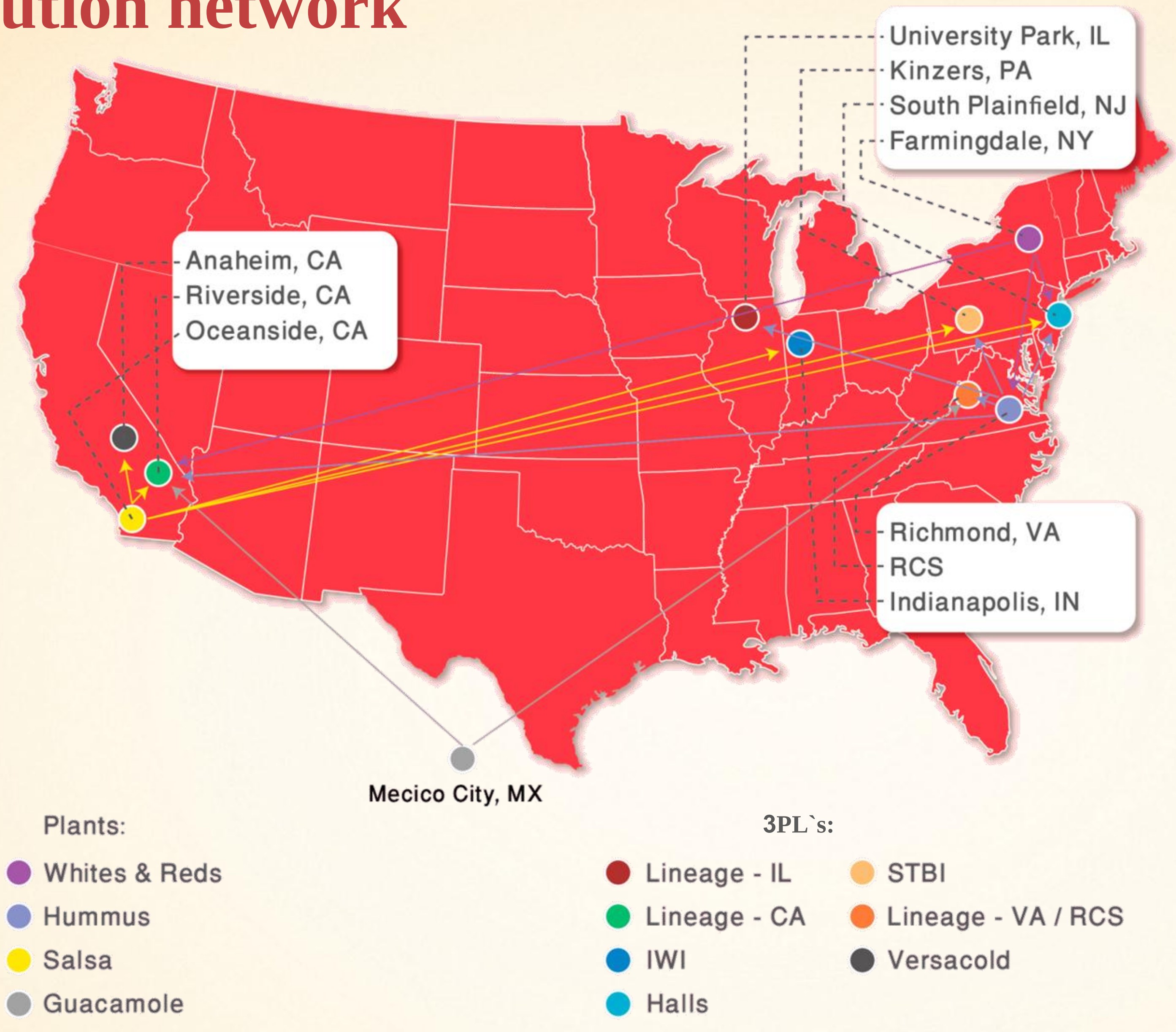
- NY dairy dips plant
- California salsa dips plant

* As of 2011, all Sabra's investment have been self funded

First-of-its-kind global “Center of Excellence”

The Center will further research capabilities and improve Sabra-Obela’s products in all aspects of food manufacturing and distribution

Sabra's highly efficient nationwide distribution network



Expanding into Markets outside the U.S.

Hummus is becoming a very popular dish in many parts of the world… However, it is a globally fragmented category with no global leader






We examined the needs of consumers from various countries around the world and identified 3 key insights:

I. Growing awareness of the importance of adopting healthier eating habits

II. Sharing good food with those you love is highly enjoyable

III. Each country has different enjoyable occasions
and ways of eating hummus:

Meal

Home AFH

Spreading / Sides

Snack

Home AFH

Dipping

Rationale behind entering Canada, Australia and Mexico

Canada

- Among the world's major economies (#12)
- Population - 35mm people
- Proximity to the U.S
- High hummus awareness (84%) with HHP higher than that in the U.S. (29%)
- Consumers like dipping and hummus

Australia

- The world's 13th largest economy
- Population - 23mm people, 70% of which in 5 cities; 25% born overseas
- High hummus awareness (93%)

Mexico

- The world's 14th largest economy and 2nd in LatAm
- Favorable demographics
- Key market for global companies
- Proximity to the U.S. market
- Population - over 20mm people just in greater Mexico City (total population over 110mm)
- Consumers' preferences suitable for adoption of hummus

Sabra-Obela Global Markets

A different challenge in each market

Expand an Emerging Market

Low Hummus Penetration
& High Awareness

United States
Canada

Create a New Market

Low Hummus Penetration
& Low Awareness

Mexico

Win in Existing Markets

Medium Hummus Penetration
& High Awareness

Australia

Sabra
Canadian Market

Canada’s population is 35MM

Australia

23MM

population

Canada

35MM

population

- Western Canada 28%
- Ontario 39%
- Quebec 23%
- Other 10%

California

38MM

population

Source: Census Data

USD 96MM Hummus business

USA

$636 MM

Hummus market

$2.14/person

CANADA

$96 MM

Hummus market

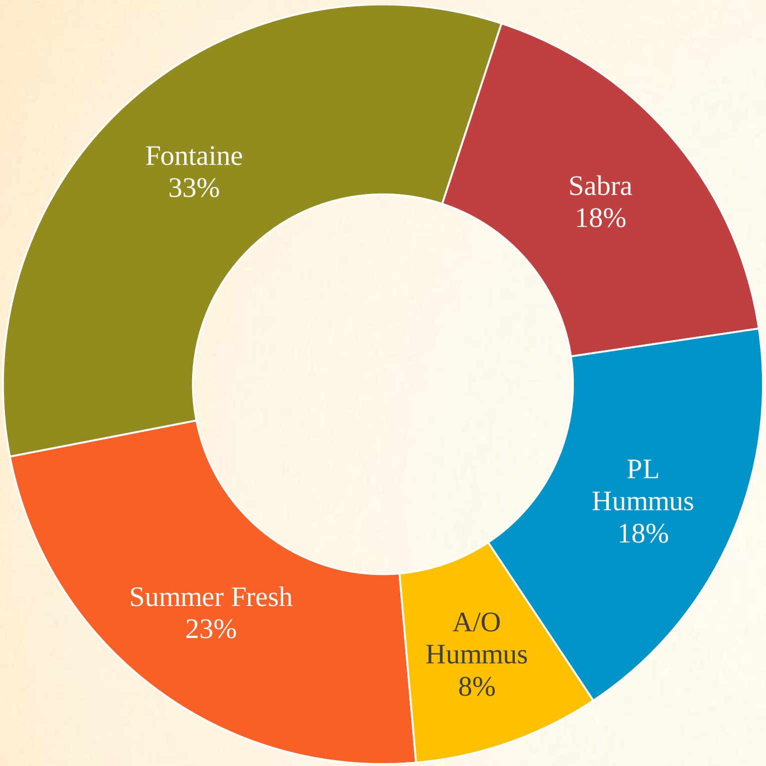
$2.70/person

While a small country (in population), Canadians spend more on hummus than USA

Source: IRI, 52 weeks ending 4/20/14; Nielsen 52 weeks ending 4/5/14

Sabra entered a developed market; strong competitive brand landscape

Value Share %



Competitive landscape

Authentic, local brand;
Stronghold in Quebec

Rooted in health;
Interesting flavor mix;
Stronghold in Ontario

Source: Nielsen – 52 weeks April 4th 2014

Complex retailer dynamics

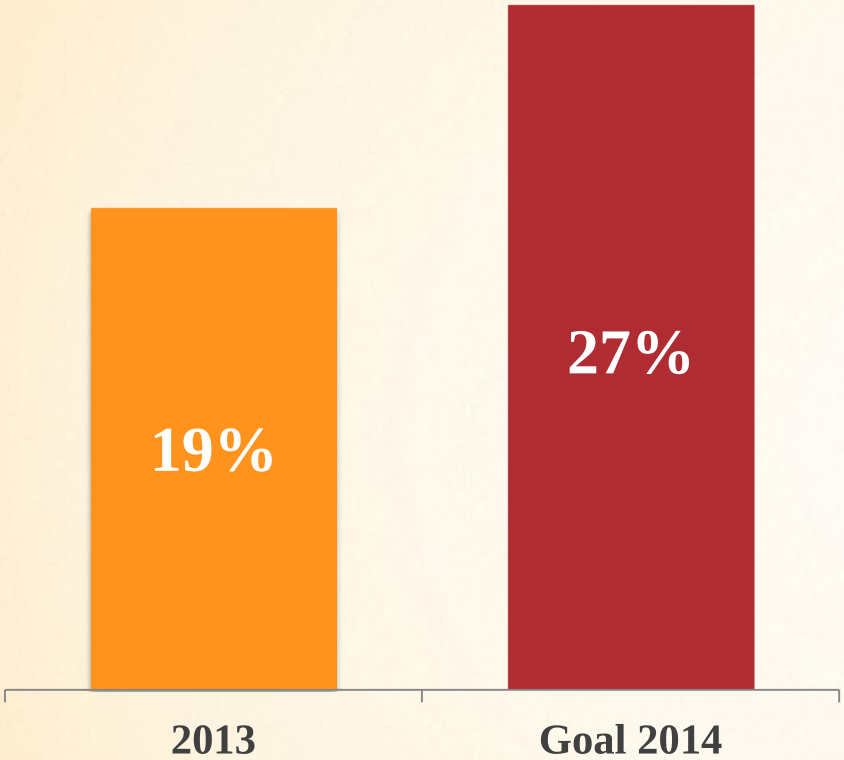
Traditional Grocery	Mass Merchants	Club
Loblaws	Walmart	Costco Wholesale
Sobeys	Target	
metro Food at its best.		
Overwaitea B.C.'s very own food people.		

Loblaw's is the largest retailer in Canada

Challenge #1: Awareness and household penetration still low

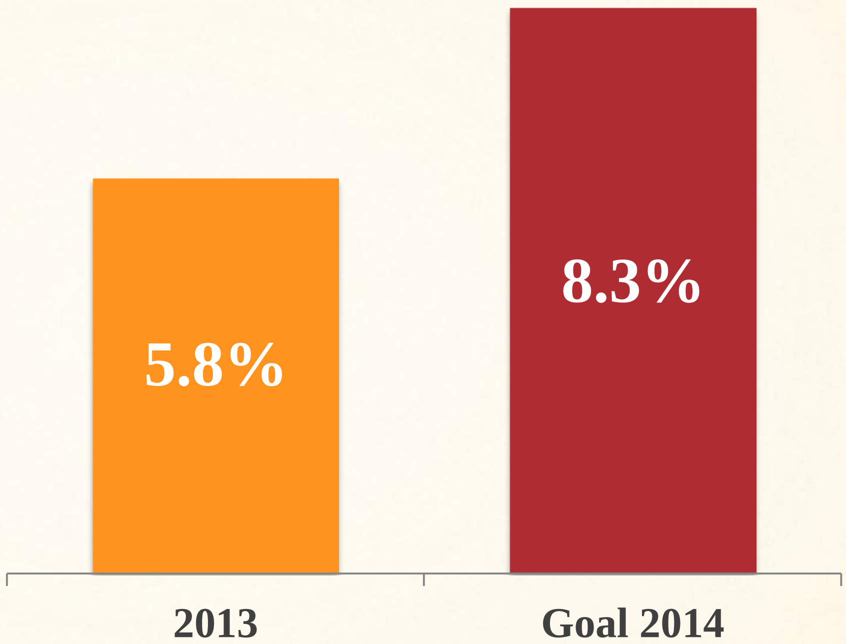
Need to know about us

Sabra's Brand Awareness



So more can buy

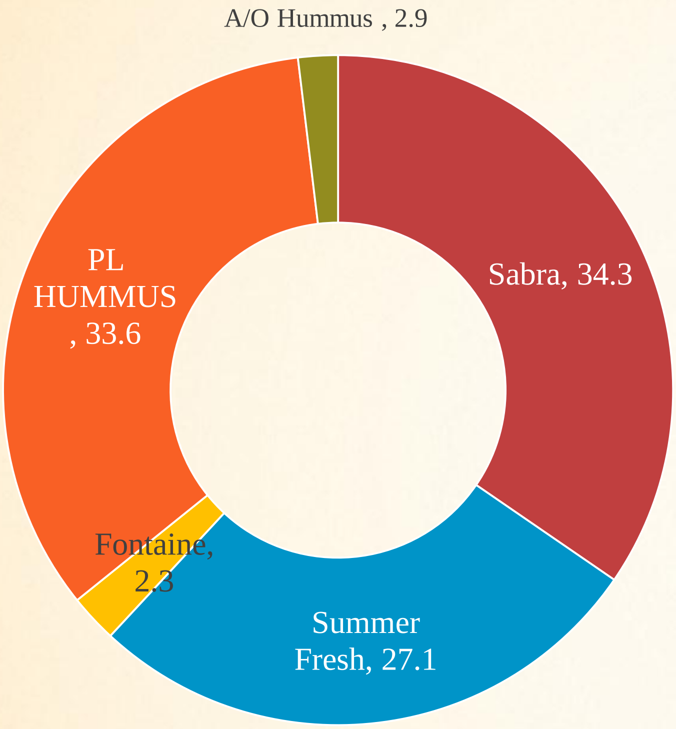
Sabra's HH Penetration



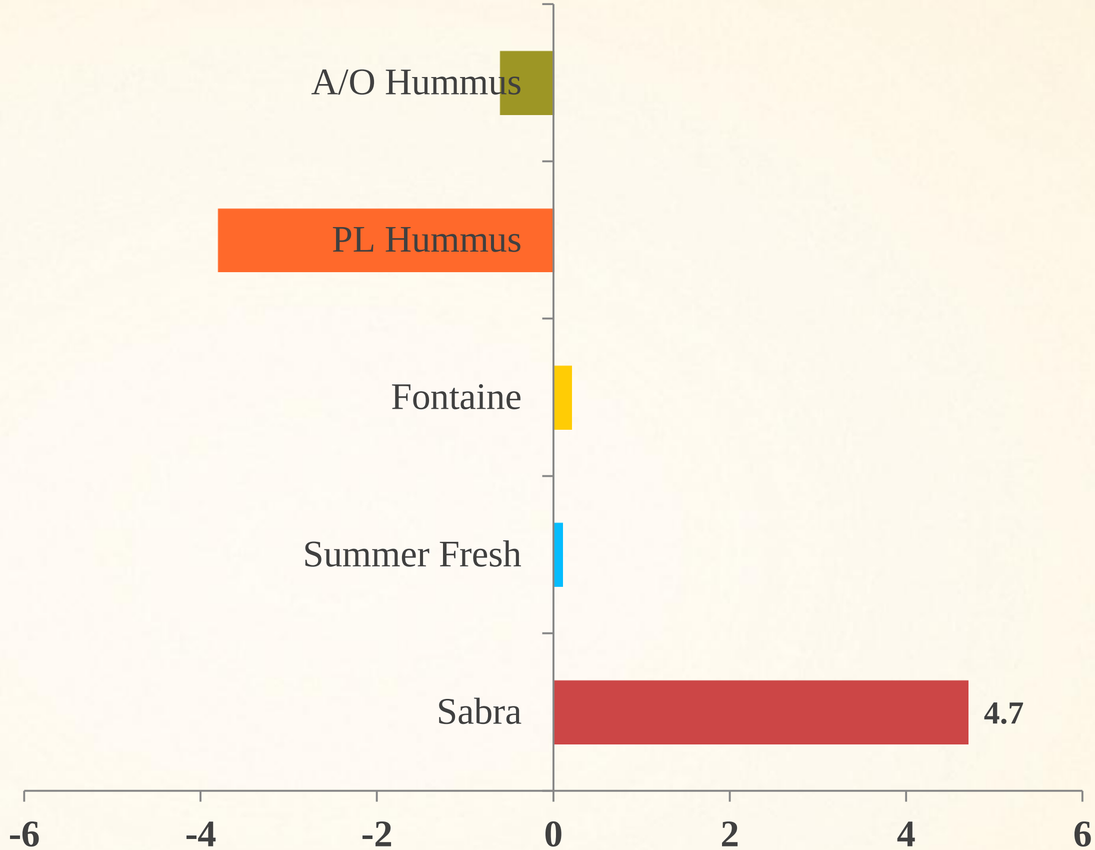
Source: Nielsen, 2013; Sabra Internal Goals 2014

Challenge #2: Strengthening in Ontario; need to maintain

CAD 40MM Hummus market
(CAD Share %)



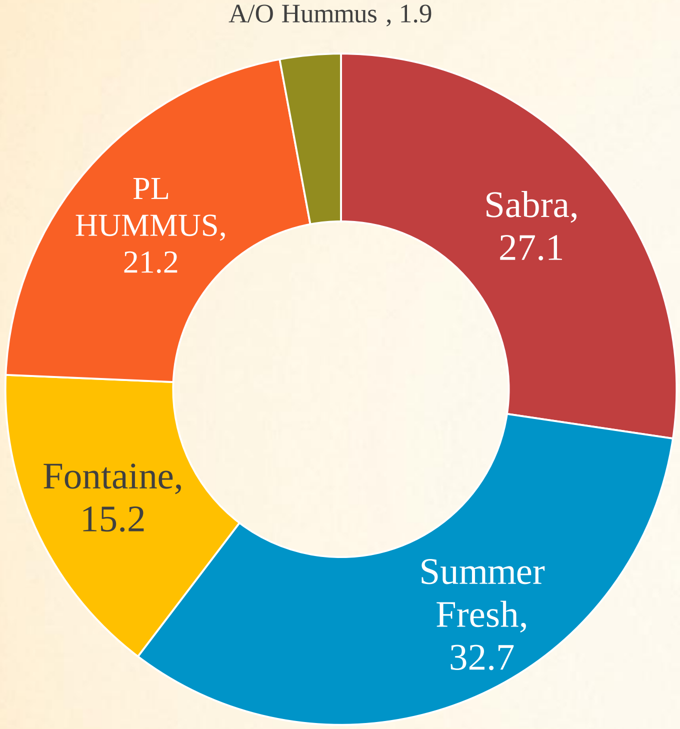
Sabra driving category growth
(CAD Share Pt % 2013 vs. 2012)



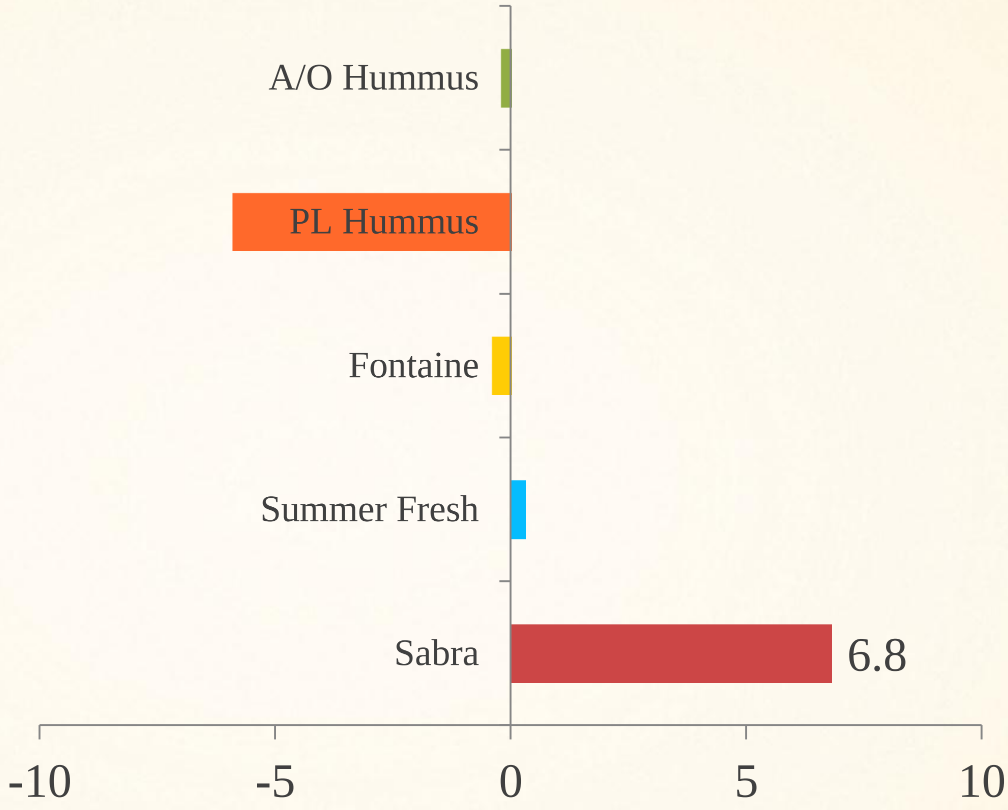
Source: Nielsen – 12 weeks ending April 5, 2014, Data in retail selling prices

Challenge #3: Sabra is #1 at Loblaw's; need to dominate

CAD15MM Hummus market at Loblaw's Conventional Only (CAD Share %)



Sabra driving category growth (CAD Share Pt % 2013 vs. 2012)



Source: Nielsen – 12 weeks ending April 5, 2014, Data in retail selling prices

Obela | Global Markets

Obela - Australia

Retail market in Australia

General Facts

- **Highly consolidated market -** two customers have 72% share
- **~70 cents in every AUD 1** of retail spending goes to Coles + WW
- **Horizontal expansion other retailing**: Petrol, credit cards, insurance, hardware and general merchandise
- **Vertical expansion:** supply chain, farms, abattoirs and direct investment in suppliers
- **Strong private label focus** – targeting 35% total
- **Key treats** – increased regulation, Aldi and Costco

Woolworths

- **Australia's largest retailer** – 41% share
- **900 stores:** company owned
- **3rd most profitable retailer in the world**
- **Annual sales:** AUD 56 Billion
- **Growing:** at 4%pa
- **Publicly listed:** ASX
- **Positioning:** "fresh food people"

Coles

- **Australia's 2nd largest retailer** – 31% share
- **750 stores:** company owned
- **3rd most profitable: retailer in the world**
- **Annual sales:** AUD 60 Billion (west farmers)
- **Growing:** at 5%pa
- **Publicly listed:** ASX
- **Positioning:** "Driving Prices Down"

Metcash

- **Australia's 3rd largest retailer** – 14% share
- **Act as a distributor:** 2,700 independent stores (950 supermarkets)
- **Annual sales:** AUD14 Billion (west farmers)
- **Sales Flat:** at 0%pa (losing share)
- **Publicly listed:** ASX
- **Positioning:** "Your Local"

Our Category: Dips for Entertaining

The Dips Category

Performance:
- Sales: ~AUD 250 MM
- Growth: 8.4% MAT

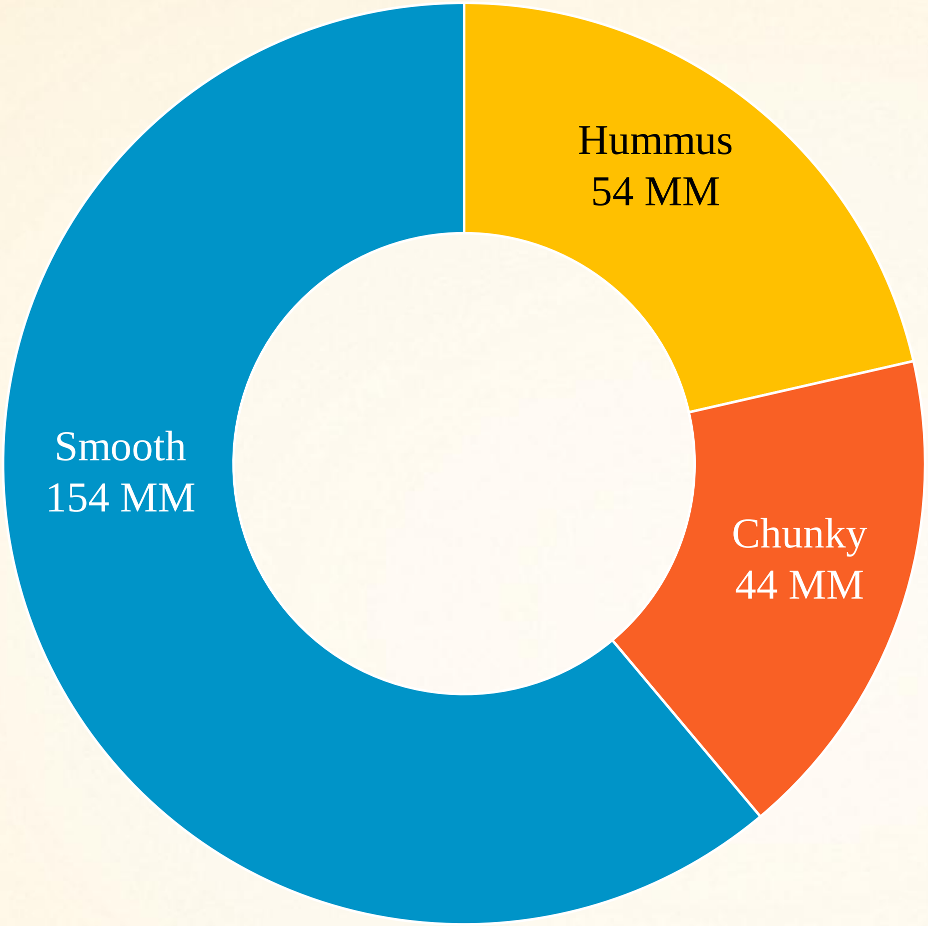
Product Proliferation:
- 160+ skus
- 44+ Hummus skus
- 50+ flavors
- Bases include veggie, yogurt, cheese, hummus, etc.

Manufacturers:
- 8+ manufacturers
- Limited investment
- No brand differentiation

Other Key Challenge:
- Excessive promotional activity

Total Chilled Dips

Total AUD 252 MM



Source: Aztec, National Scan Sales.

Obela fresh dips

CopperPot fresh dips

Red Rock deli dips

Overall Marketing Strategy

What is our marketing challenge?

Awareness of Hummus
= 97%

Usage of Hummus
= 15%

Aware but do not purchase

=

Very valuable consumer…
- Heavy users buy = 30x per year
- Occasional users buy = 6x a year

?

?

They prefer other dips; some do not like current Hummus on the market

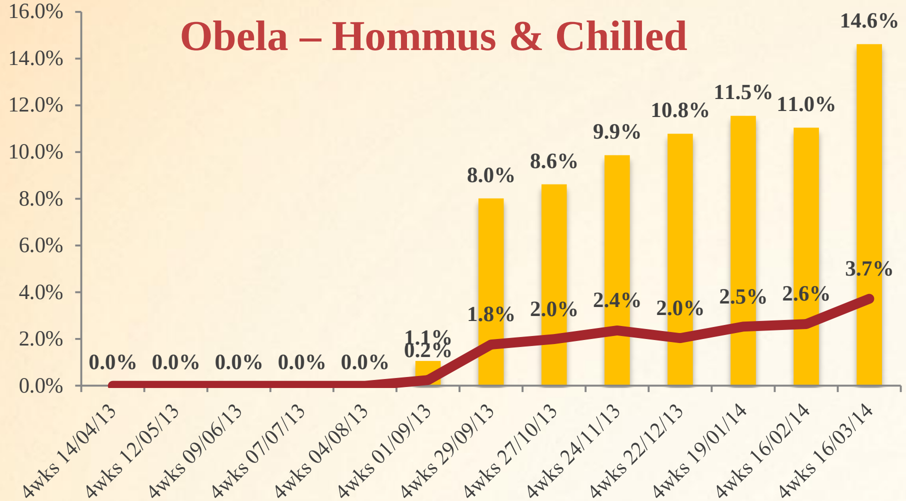
Steal share and then get occasional users to purchase more… (Hummus today is too functional)

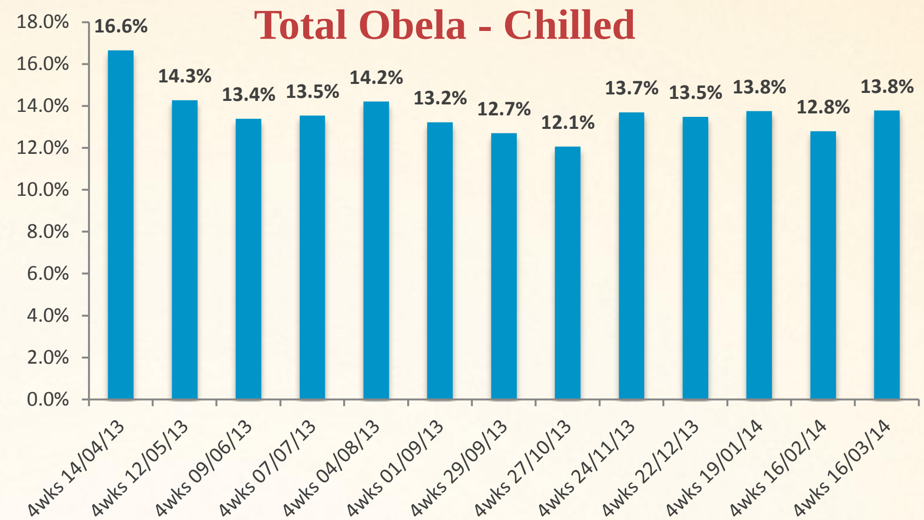
We are currently testing sampling (primary), PR, social tactics

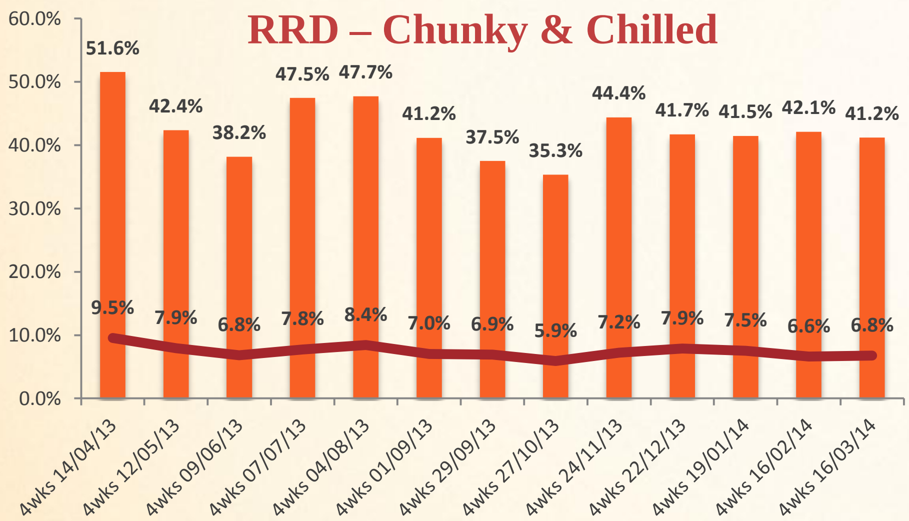
We have two marketing tasks:

1. **Convert existing users - 27% top2box preference - much better taste**
2. **Win exiting dipping customers with hummus - taste and health**

Obela's hummus share reached a historical high of 14.6% in March



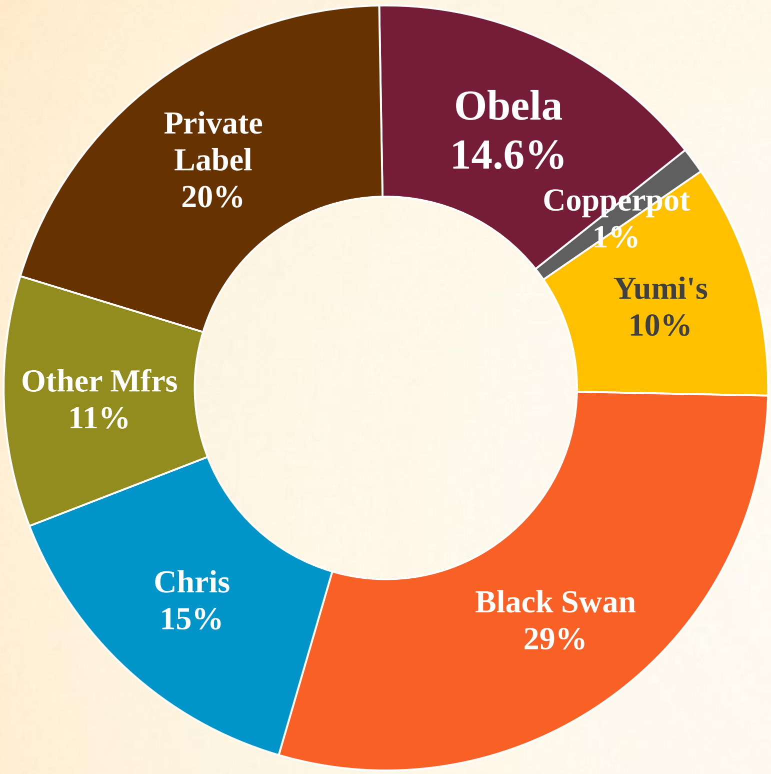




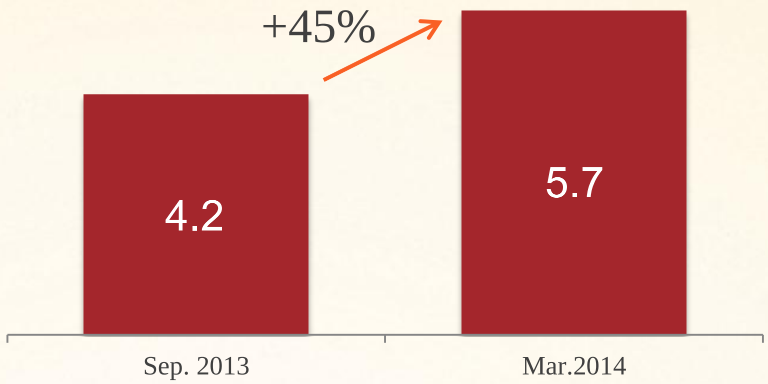
- Obela share of hommus & total chilled dips has increased following HTG launch
- RRD share of chilled increased, despite losing a share point to WV in chunky

Obela Australia's hummus grew from 0% to 14.6% in March 2014

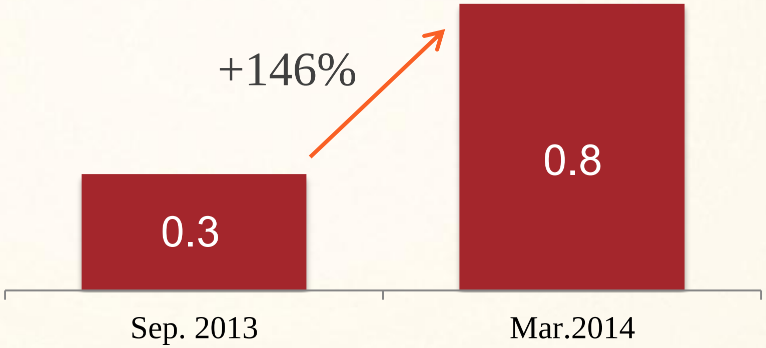
Mar 2014 Australia Hummus Market Share
Category size AUD 54 MM (52 weeks)



Australia Hummus Category
(Mounty term)



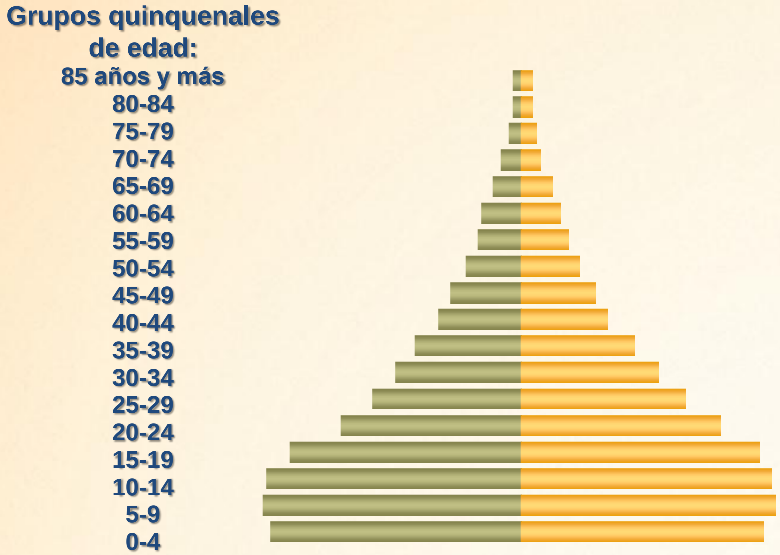
Obela Hummus (Mounty term)



Source: Aztec, National Scan Sales 16/3/14.

Obela - México

Total population profile is becoming more “adult”… We are targeting to 31.4 Millions people leaving in Metropolis and big Citiesumma



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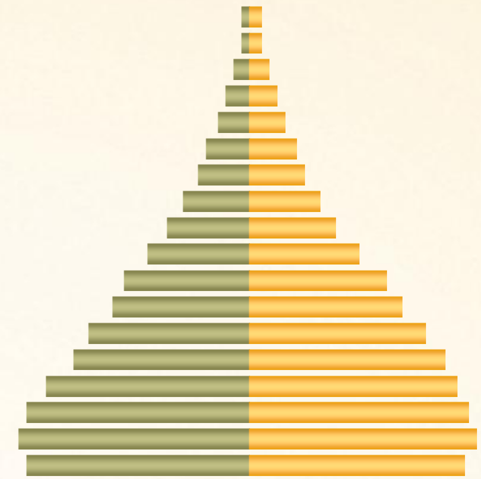

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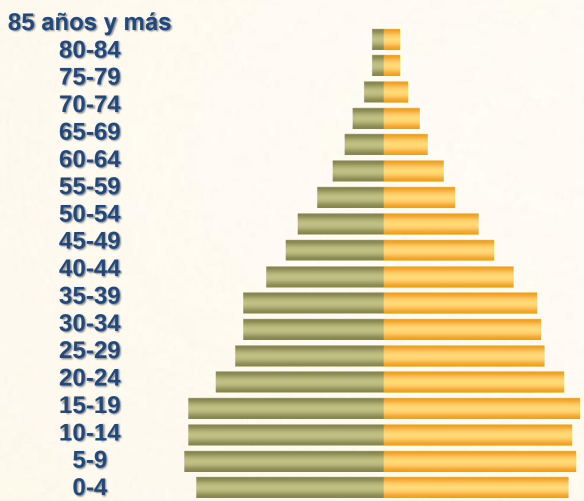


2010

Obela

Trough deep research we realized that Mexican consumers appreciate the versatility of Hummus and and represent significant growth opportunity

With the right education - hummus can be a tastier and healthier substitute for many foods, thus, sourcing from a much bigger variety than just dips

You can use Hummus in several ways. Please select the ways of using Hummus That you are aware of.

	USERS - OVERALL
	AVERAGE AWARENESS OF WAYS: **2**
As a Snack / In-between meals (in home/ out of home)	72%
As a Dip – Social (parties)	41%
As a Spread (very functional) – instead of mayo, cream cheese	49%
As an Ingredient / Complementary Dinner	10%

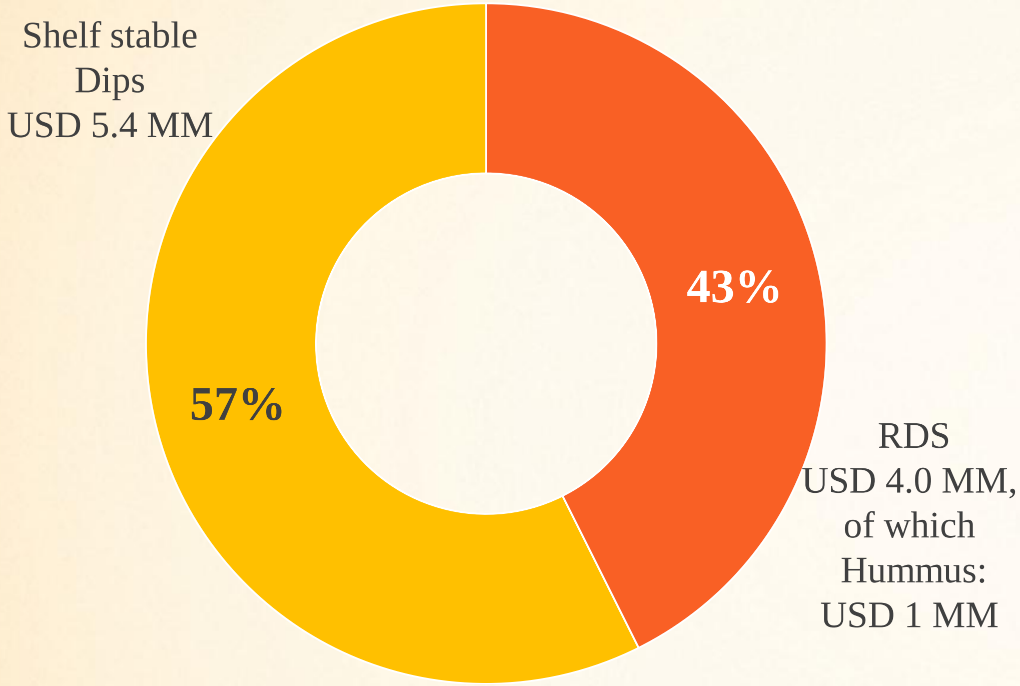
% *Sign.> Users* % *Sign.> Users*

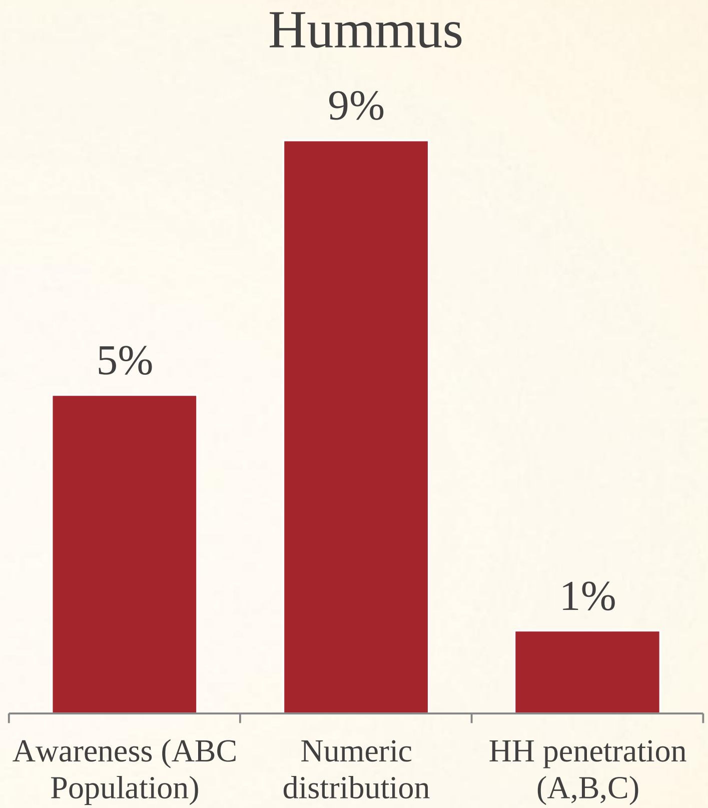
"Hummus is adaptable, easy to eat, easy to buy, easy to dispose of, won't make a mess. All these things make for a fun, simple food."
– Consumer, Mexico (January 2013)

EPIPHANY RESEARCH: TOPLINES | USAGE AND ATTITUDE | MEXICO, DEC.-JAN. 2013
*Growth estimated based on Nielsend food basket report 2013

Our challenge: Build a sizable hummus business in a virtually non-existent dips market or habit

Mexico Dips Market* USD 9.4 MM

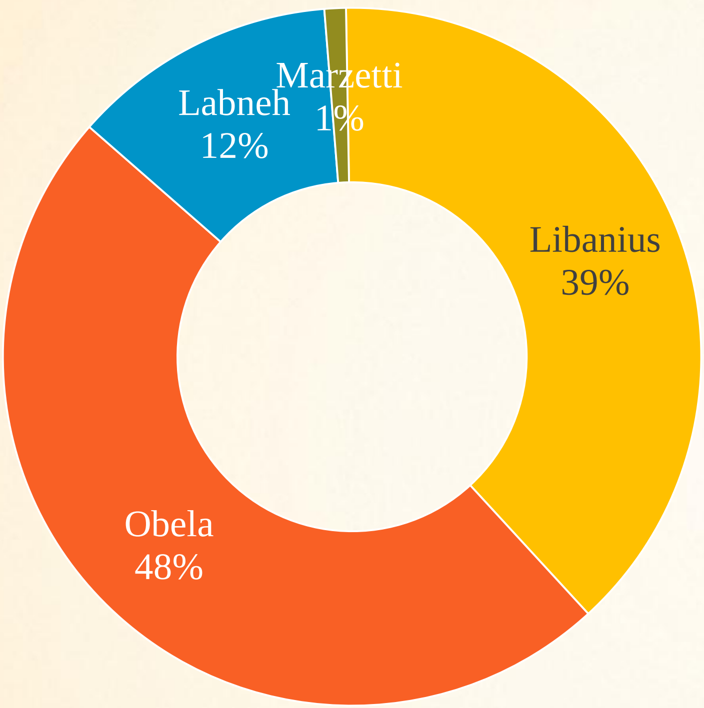




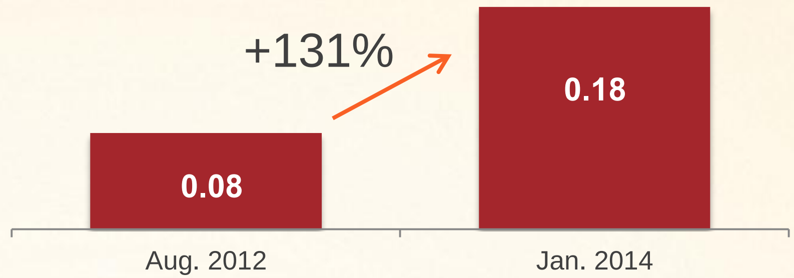
Source: Nielsen Scantrack June 2013, 52 weeks
*Retail sales of SSS stores…Club stores are not included
**exchange rate MXN to USD Dec 2013

Obela drove category growth since its launch in Mexico

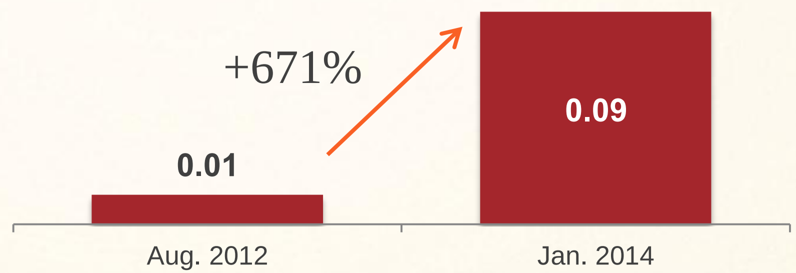
Hummus Category USD 1.3MM (52 weeks)



Mexico Hummus Category (Mounty term)



Obela Hummus (Mounty term)



Their love for food facilitates adoption but with an important level of "tropicalization"

Japanese Fast Food Restaurants
Leading Brand in Mexico

Pizza with Corn, Chile, Chorizo,

Home Delivery Pizza
Leading Brand in Mexico


Obela
HUMMUS CLÁSICO
Obela

Retail Images

SORIANA


Obela
Sabra
Sabra-Obela's growth
is just an appetizer
to the yet-to-come
main course…

Sabra-Obela’s next level

USD 2 Billion

By 2024

By increasing HHP and buying frequency in the US &
by building scale businesses in at least 3 new markets in the next 5 years

A taste of the future…


Obela
Obela
HEO QUAY - GIÒ CHẢ - JAM BON
BÁNH MÌ-HEO QUAY- CHẢ LỤA


Obela
Obela


Obela
KÖŞE BÜFE
Obela
KONTÜRLÜ TELEFON
KÖŞE BÜFE
TAZE SIKMA MEYVE SULARI
GORALI SOSİSLİ
2,25
2TL
2.00 TL
Obela
Obela


Obela
Sabra
Thank You