



45 YEARS Natural Products EXPO WEST®

The logo features a large '45' in a dark red color, with 'YEARS' written in a smaller font inside the '5'. To the right of the '45' is the word 'Natural' in a dark grey font, followed by 'Products' in a larger, bold dark grey font. Below 'Products' is 'EXPO WEST' in a dark red font, with a registered trademark symbol (®) to its right. A decorative circular burst of small dots in shades of blue and red is positioned above the word 'Natural'.



By Informa Markets

# CPG INNOVATION SUMMIT KEYNOTE:

## CHARGING THE STORM THROUGH CONSUMER-LED TRANSFORMATION



**Rachel Ferdinando**

CEO

PepsiCo U.S. Foods

# CHARGING THE STORM THROUGH CONSUMER-LED TRANSFORMATION





# THE CONSUMER IS UNDERGOING MASSIVE SHIFTS

RAPIDLY  
CHANGING  
CONSUMER  
BEHAVIORS

GLP-1'S  
RESETTING  
APPETITE

AFFORDABILITY  
DRIVING VALUE

ACCELERATING  
DIGITAL  
INNOVATION &  
AI ADOPTION



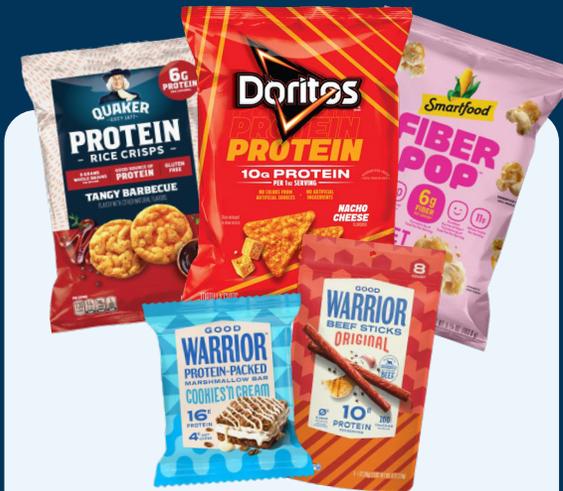
# THE PLAYBOOK: FOUR SHIFTS

# ENTERPRISE-WIDE MULTI-YEAR TRANSFORMATION



INGREDIENTS

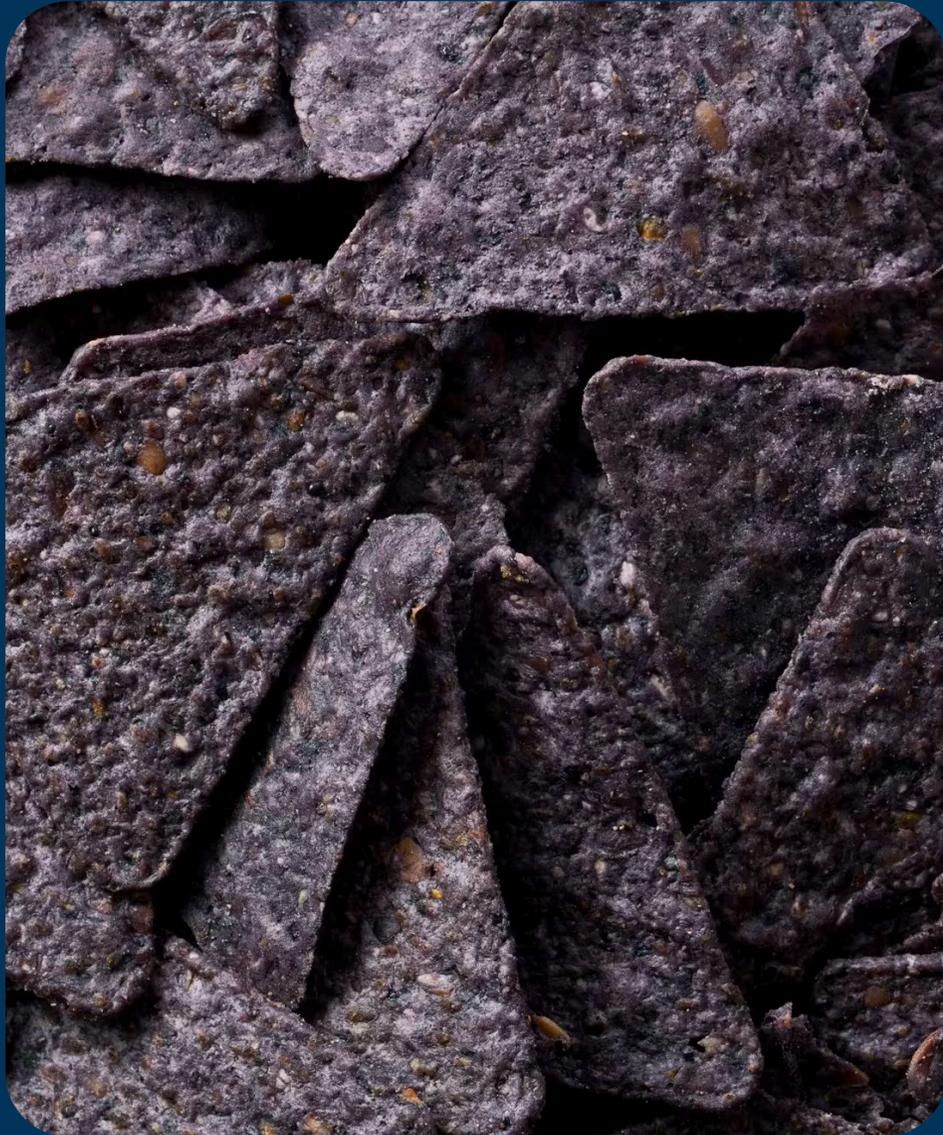
TRANSPARENCY



PORTFOLIO  
EVOLUTION

VALUE





**NO ARTIFICIAL COLORS  
OR FLAVORS IS THE**

**#3**

**Most sought-after  
claim/consumer concern**

# INGREDIENTS – REAFFIRMING CONSUMER TRUST



# NAKED OF DYES AND ARTIFICIAL FLAVORS

WELCOME TO THE  
RENAISSANCE OF SNACKING

# LAY'S POTATO CHIPS CONTAIN JUST 3 INGREDIENTS



Potatoes



Oil



Salt

**TRANSPARENCY —  
CHANGING THE  
CONVERSATION**

NOW WE'RE BACK TO SHOW WHY WE ARE  
**AMERICA'S FAVORITE CHIP.**  
**SINCE 1938**



# 100,000

BAGS OF FRESH LAY'S DELIVERED TO CONSUMERS

# IN 72 HOURS



If this is the farmer, I will glad to be a 🍌  
#LaysSBLX #Entry #SBLX 🍌🍌

Hot potato man #LaysSBLX

I didn't get a chance to order. Sold out fast. 😭

@lays Can't wait for the freshest bag of potato chips to arrive TODAY!

The farmers ALWAYS get the job done 🍌🍌  
🍌🍌 🍌🍌 🍌🍌

BRO I DIDNT GEF ONE PUT MORE UPPP

Ty for the free bag of chips. This was fun!  
#LaysSBLX





# 61%

of Americans are interested in purchasing functional foods & beverages

# PORTFOLIO EVOLUTION – INNOVATION WITH INTENTION





46%

of consumers cited affordability  
as a top concern

# VALUE – RESTORING EVERYDAY ACCESSIBILITY

WE HEARD THE VOICES  
OF OUR CONSUMERS

**SAME SIZE**

**NEW  
LOW  
PRICE**

"IF THERE'S ANYTHING  
LAY'S WON'T DO,  
IT'S REDUCE PRICES."  
- Michael

OH MICHAEL,  
DO WE HAVE  
A SURPRISE  
FOR YOU.

**SAME SIZE.  
NEW LOW PRICE.**

Lay's MESSAGE RECEIVED



# HOW TRANSFORMATION REALLY HAPPENS

# LEADING TRANSFORMATION AT SCALE



COLLECTIVE  
OWNERSHIP.



RESILIENCE.



SPEED.



CONVICTION.

# THE LEADERSHIP PHILOSOPHY

