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Omega-3 Sales in Different Channels

The Increasing Impact of Retail Strategy



- Market Overview
- Amazon.com



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by Danielle Rose

Popular media outlets and the Internet have disseminated volumes of news about omega-3s, whether good, bad or inaccurate. Manufacturers and the industry at large have attempted to navigate these waters through education, product development and strategic retailing.

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by Adam Ismail

Not only has the Internet become an attractive platform for shopping, but also for companies trying to make a quick buck. Fortunately, normal rules of business still apply online.

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Exploring New Channels for Omega-3s



It's no secret that **omega-3s** are found in multiple sales channels; in fact, the presence of omega-3 pharmaceuticals with recommendations from health care practitioners underscores the fact that this should be a growth area for product sales across channels. Given the amount of positive research on the health benefits of omega-3s, the growing proportion of consumers taking these products, and the power of social media and other marketing in driving interest, launching a successful new product should be a snap.

Unfortunately, it's never a snap. Increasingly, healthy products such as omega-3 supplements can be found in myriad retail channels. And the reasons consumers purchase certain products in certain channels change. Someone with a basic understanding of fish oil might go for the drugstore brand; if they've been taking it for a while, they might get the large size at a warehouse store. If they're just getting educated and need guidance, it's the health food channel; but, if they have found a great brand, they may just buy online for the convenience. (Unless you're like me and live in Arizona, in which case, it's only online purchasing from November to April to avoid receiving one giant mess of melted product.)

Marketers and product developers need to consider their distribution channel during the product ideation and development process. Not all products fit in all channels, and sometimes having a clear point of differentiation in the market can make all the difference. This issue of *Omega-3 Insights* offers a take on some of the considerations when positioning products into a channel, as well as the sales trends that may drive your product launch in a new direction.

As always, if you have additional thoughts to share, don't hesitate to reach out.

Best regards,

A handwritten signature in black ink that reads "Heather Granato".

Heather Granato

VP, Content, Health & Nutrition Network

heather.granato@informa.com



[@heathergranato](https://twitter.com/heathergranato)

Insights on Omega-3 Sales and Trends

by Danielle Rose

Omega-3s are an essential dietary ingredient widely recommended for supplementation in both the medical and alternative health care fields. According to a 2014 Mintel report on oils, the section “Importance of Oil Product Attributes” revealed 40 percent of people believe omega-3s are important to health. Despite this, recent reports show a decline in omega-3 sales in the United States. Improved marketing and media exposure for this imperative nutrient may help to improve sales across the board, but in a market this broad, discovering where to invest efforts can be difficult.

According to the Global Organization for EPA and DHA Omega-3s (GOED), the global volume of eicosapentaenoic acid (EPA) and docosahexaenoic acid (DHA) oils was more than 89,000 mT (metric tons) in 2013, reflecting a 2.6 percent increase from 2012. However, the value increase was much higher—coming in at 10 percent—in large part, due to an increase in the price of crude fish oils and the reduced availability of Peruvian anchovy.

However, as sales have exploded in Southeast Asia, China and South America, GOED reported countries in those geographies are seeing more growth potential than the mature markets of North America and Europe, which continue to dominate in both volume and value.

Since mid-2013 the decreasing number of consumers exposed to positive omega-3 media has hurt sales, and the U.S. market has cumulatively lost \$149 million in retail sales in the mass channel.

Using Media to Drive Sales

According to Factiva data analyzed by GOED, although omega-3 stories in major U.S. media outlets have almost doubled since 2008, the reach of positive omega-3 stories has dropped from 10 million to 3 million people. To combat this decline, GOED is currently in the midst of a national campaign to increase positive media exposure of the nutrient.

The campaign’s test run, which took place fall 2014 in the Charlotte, North Carolina area, focused on publicizing pro-omega-3 messaging in attempt to raise sales at the consumer level. Educational resources in various formats were used, including a website, social media platforms such as Facebook and Twitter, print ads, local television commercials, billboards, and signs placed at retail outlets throughout the region.



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The result was a 5.8 percent increase in year-over-year unit sales during the duration of the campaign—double the 3 percent goal. This reflects an estimated 28,000 to 61,000 new customers and was not due to any price promotions or discounting.

Natural Channels

Customers are widely informed about omega-3 supplements through trusted sources such as their health care practitioner or local natural products store owner. Ellen Schutt, GOED communications director, said markets that have the opportunity for direct consumer conversation, such as multi-level marketing (MLM) and practitioners, seem to be reporting the most success with omega-3 sales.

In a recent study by Aker BioMarine, 88 percent of health care practitioner respondents claimed they “always” or “frequently” recommend fish oil, whereas only 2 percent reported never recommending omega-3s—a similar usage profile as for vitamin and probiotic recommendations.



In one study, 88 percent of health care practitioner respondents claimed they “always” or “frequently” recommend fish oil, whereas only 2 percent reported never recommending omega-3s—a similar usage profile as for vitamin and probiotic recommendations.

The knowledge exchange in smaller natural retail stores is similarly valuable to the consumer, and is often lacking in conventional or mass market channels.

“We tend to educate our customers a lot, that’s what they’ve come to expect from us as an independent health food store,” said Steve Shah, owner of Nature’s Pavilion in northern New Jersey. “They want high-quality fish oils with high amounts of EPA and DHA, and no heavy metals.”

John Malatras, owner of independent store Harvest Moon Health and Nutrition, said most of his customers are just regular folks looking for a supplement. They don’t have much by the way of requirements, so it’s his job to help them discover which omega-3 is the best fit. He discusses concerns such as health issues, diet and food restrictions to determine potency, source of the oil and more before making a recommendation.

The responsibility of an independent health food store to provide accurate information and a product the consumer can trust is paramount. Therefore, the most important element Malatras and Shah are looking for in a fish oil is a third-party independent lab assay with adequate testing.

“There’s no such thing as ‘good faith’ in a nutritional supplement any longer,” Malatras said. “You need an independent perspective.”

Marketing Niches and a Changing Landscape

Marketing companies are finding different ways to share their stories with retailers and consumers. As one example, Wiley’s Finest products are sold primarily through natural channel retail. But there are many trends affecting purchasing patterns; consider how the current generation of new parents is more likely to shop at larger chains in the natural outlet, such as Whole Foods Market and Sprouts Farmers Market. As a result, Wiley’s has found its prenatal DHA product does better in those stores than it does in independent health food stores. Smaller, pocket segmentations do exist, such as people at co-ops or mom-and-pop stores looking for fermented cod liver oil, but Wiley’s CEO Sam Wiley said those differentiations don’t apply at the larger retail level.

Likewise, Andreas Koch, marketing director at Barlean’s, finds the mass market adoption of more natural market products significant and feels there is a marrying of the two in response to customer demand.

Regardless of age or demographic, Koch said online customers tend to be the most decisive about their omega-3s. They find a brand they like, and enjoy the convenience of reordering the product and having it shipped to their doorstep.

“People are becoming more savvy and knowledgeable from the web,” Koch said. “They’ve done their research and know what they want; they’re not going to waiver.”

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Working with Health Claims

Schutt said when a group of consumers was asked about the potential benefits of omega-3s, most respondents cited heart health. Because a large number of studies on omega-3s also focus on cardiovascular benefits, GOED geared its omega-3 marketing campaign to the 45- to 65-year-old population segment, which has traditionally shown the most interest in maintaining heart health.

In addition to heart health, Becky Wright, marketing director at Aker BioMarine, said many consumers are looking for overall well-being and joint support from their omega-3s. And upcoming research in terms of brain health—including cognitive function, memory and depression—also holds potential for omega-3 marketing.

Combination marketing can also be effective. Koch said Barlean's is catering to the Baby Boomer generation by offering combination blends in its omega-3 oils, whether for heart health, or to benefit joints or eye health. Nordic Naturals offers combination oils targeted at specific needs, and formulas that contain gamma-linolenic acid (GLA) from borage seed or evening primrose oil. And Malatras said sometimes he recommends flax oil not only for its omega-3 content, but for its natural ability to support hormones and breast cancer prevention and recovery.



Krill provides the nutrient choline—essential for cell structure and function—and assists omega-3 fatty acids in contributing to cardiovascular and cognitive health. These attributes have helped krill maintain ground in a declining market.

Krill is an increasingly hot ingredient in the omega-3 market. The perception of krill as a high-value omega-3 is due to its phospholipid-bound EPA and DHA, which Wright said is more prone to assimilation than other marine oils. Krill also provides the nutrient choline, essential for cell structure and function, and assists omega-3 fatty acids in contributing to cardiovascular and cognitive health. These attributes have helped krill maintain ground in a declining market.

However, Mintel reported 64 percent of consumers find the numerous health claims for food confusing—making clear, concise and permissible claims for EPA and DHA essential.

Concentration and Dosing

The trend of consumers buying higher-concentration oils remains strong, with high dosages comprising more than 40 percent of the value market share, according to GOED's 2014 Ingredient Market Report.

Many private labels have recognized the need to stand out by offering a higher-potency product. Henry Arevalo, account manager at Icelandirect, reported many customers are inquiring about higher-concentration omega-3s. As a result, Icelandirect offers concentrations higher than the typical high-dose 36/24 blend, although Arevalo often advises 36/24 is usually sufficient for customers wanting a high dosage.

"Concentration is really important to customers," Wiley affirmed. "We think that is the minimum entry point for a leading omega-3 brand."

Since potency is also reflected in price, Malatras stocks a range of low dosage, mid-potency and high-potency omega supplements. In this way, customers adding more fish to their diets may choose to save money by going with a lower-potency product, he said.

Consumers are becoming more aware of the skewed omega-6 to omega-3 ratio in their diets, Koch said, and are trying to offset this via higher doses of omega-3s. As a result, many of Barlean's high-concentration omega-3s are marketed for the better-informed natural channel consumer.

Sustainability and Sourcing as a Market Driver

Wright said sustainability has come to the forefront in the aftermath of the Peruvian fishery shut down, and more consumers will be asking where their fish oil is sourced, driving the need for greater transparency across the board.

"Consumers are becoming more discerning about their omega-3 supplements in regard to health benefits and delivery methods, but they are also equally concerned about eco-labels and where their ingredients are coming from," Wright said.

An Ohio-based company that processes oils—caught by American fishers in Alaska—in its family-owned plant, Wiley's Finest has found certain demographics truly care about unique aspects of fish oil sourcing. Whether it is a desire for "American made," or sustainability, Wiley believes transparency with regard to sourcing and quality is key.

"What we see with the American consumer is a desire to know where things come from," Wiley stated. He added, "We have contract manufacturers who buy from us and they want to know where their fish is coming from."

Although krill oil excels in conventional markets, media has left the environmentally focused consumer concerned about krill's sustainability. This perspective has left krill oil wanting in the natural market. As a result, Aker BioMarine has doubled its efforts to increase customer awareness about the sustainability of krill as compared to other marine omega-3 sources.

Nordic Natural has taken another route, marketing its Omega-3 Phospholipids™, small easy-to-swallow soft gels comprised of 448 mg of phospholipids and 520 mg of EPA/DHA omega-3s per serving, as another sustainable option, manufactured from herring roe and concentrated fish oil.

When it comes to source and traceability, minimally processed, organic and GMO-free oils are another consideration.

Sustainability has come to the forefront in the aftermath of the Peruvian fishery shut down, and more consumers will be asking where their fish oil is sourced, driving the need for greater transparency across the board.



Mintel reported the 25- to 34-year-old and 18- to 24-year-old population segments are highly likely to rank all-natural, organic and GMO-free as important product attributes, as do households with children.

“Today in the United States, more people are also seeking ‘non-GMO’ on food labels than ‘organic,’” Wright said. “In fact, nearly 20 percent of shoppers, according to the Hartman Group, are actively seeking foods labeled non-GMO. Additionally, about a third of consumers are actively avoiding foods with GMOs.”

Malatras is also looking for non-GMO verification, and when it comes to flax seed or other vegetable-based omega-3 supplements, he’s buying strictly organic.



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When Wiley’s Finest began in the fish oil business, its objective was to create an extremely high-concentrated oil; however, the wild red Alaskan pollock oil had such a brilliant color in its non-concentrated state that the company decided to highlight the purified oil as-is. The finished product, Orange Burst, is not the highest-volume seller, but Wiley said it has some of the company’s biggest fans, proving there is certainly a place in the market for products closer to their natural state.

“Our biggest challenge with health food in particular is ... the product needs to fit into certain criteria,” Wright said. “Is it sustainable, GMO-free, etc.?”

Finding the Right Form for the Customer

The form of an omega-3 says much about not only its marketing potential, but market demand for the product as well.

According to GOED’s Ingredient Market Report, dietary supplements account for almost 80 percent of the overall global volume of omega-3 oil, followed by pet foods at 10 percent, and food and beverage at 4.5 percent for both 2012 and 2013. Value-wise, pharmaceuticals rank higher at 27 percent, and infant formula at 13 percent of the market share, as higher-value ingredients are demanded.

In Arevalo’s experience, an increasing number of food industries and end consumers are looking for powdered omega-3s. The growing trend for meal-replacement shakes is likely contributing to the trend.

Barlean's biggest sellers continue to be standard, classic fish oils, fresh-catch fish oil and flax oil, whereas fish oil and capsules trend stronger than other omega-3s in the natural channel.

Small pills are popular, as they are easy to swallow, concentrated and at a lower price per dose, Wiley said.

Shah's customers are also looking for easy-swallow options and sometimes choose liquid for its high potency and low dosing, and ability to be integrated in food. Younger generations believe the liquid is more absorbable, Wiley added. On the other end of the spectrum, the Baby Boomer and senior population tend to dislike liquid oils because they associate them with the cod liver oil they or their parents had growing up.

An omega-3's manufacturing process dictates more than the form of the supplement, however. For example, products that include enzymes to assist in assimilation—or are less processed, maintaining many of the natural elements of the oil—are high contenders for Shah's omega-3 inventory.

Koch said the bioavailability of krill makes it an ideal candidate for consumers concerned about after-taste. Since it doesn't need flavoring, unflavored krill oil may be more appealing to the natural-minded consumer as well.

"People do want a choice as far as flavor," Malatras added. "Hardcore purists don't want the flavor, but most of the people that come in the store aren't purists."

Barlean's Omega Swirl line offers flavors such as key lime and mango peach, as well as a unique liquid delivery system for omega-3 oils. With the taste and texture of a puree or fruit smoothie, Koch said the swirl products have become so popular they now come in a variety of flavors and packaging options, such as single-serve to-go pouches. The products are also being considered for mass market retail, breaking out of their traditional market share.

The sale of omega-3s seems to be driven in large part by communication and consumer understanding of the product. Education is essential, but looks different in each channel—whether the practitioner selling a private label brand, or the independent health food store owner, both of whom are in the business of opening a conversation with the end consumer. Meanwhile, internet buyers are coming to the table fully informed. Sustainability and purity are significant issues as well.

"The challenge typically is to have fish oil that appeals as a brand to the consumer," Wiley concluded. "Then we have to have a range of products that appeal to their consumption patterns." □

As a health writer, journalist and blogger, [Danielle Rose](#) provides tools and knowledge to discover one's own pathway to radiant health through body, mind and spirit. Her columns with North Jersey Media Group are best known for down-to-earth recipes, and for following foods from farm to table, discussing the processes and local and federal protocols along the way. Rose freelances for a number of Informa Exhibitions' publications, including INSIDER.



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Amazon.com — New Omega-3 Sales Channel?

by Adam Ismail

Dietary supplements already have low barriers to entry compared to many industries, but the tech industry may actually have supplements beat because it is so easy today to set up a website or even make an app without any coding knowledge. Perhaps the easiest way to combine the two—technology and omega-3s—is to put a product on Amazon.com and start selling it directly to consumers.

A number of companies are doing exactly that, because unlike traditional retailers, Amazon wants to sell everything and has very few requirements for listing products on its site. A surprising trend recently is how many companies have decided to base their entire business model on this approach. Often times they will not even build their own website, preferring to solely sell their products on Amazon.

The economics of this approach are uncertain. Most of these companies list the product on Amazon, pay some reviewers to write positive things about the product, put out a press release to announce the product launch, and then start blogging about the product. This Amazon-only approach can be costly for the amount of volume the products actually move. There is a cottage industry of paid reviewers on Amazon, only a few of whom actually disclose they are being paid. There are telltale signs though, especially with omega-3s. Some of the paid reviewers make exaggerated claims about how the omega-3s cured their bursitis, caused their joint pain to go away, etc. Even if omega-3s could do all the things they claimed, it could take a month or more to see the physical effects; however, the reviews are posted a day or two after the product gets listed on Amazon. Clearly these people did not have time to buy the product, wait for it to be shipped, consume it and then see a benefit. These reviews can cost anywhere from \$5 to \$50 per review. If the companies promote the product launch with a press release, it adds another \$500 to \$2,000 to the costs of selling the products. Overall, these costs sound fairly low, but must be assessed in terms of the volume of product being sold.

The Global Organization for EPA and DHA Omega-3s (GOED) started tracking sales of some of these startup products using RankTracer, a service that monitors sales of individual products on Amazon. For companies that follow the Amazon-only business model, sales peak immediately after a press release goes out, but quickly fall off. In the case of one product, a 1,500 mg softgel

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with 800 mg of eicosapentaenoic acid (EPA) and 600 mg of docosahexaenoic acid (DHA) per two-softgel serving, five bottles sold in the 24 hours following the press release. However, after one month, the company had only managed to sell a total of 16 bottles. The product was selling for just over \$20 per bottle, translating to approximately \$360 in revenue. The product had 59 reviews, almost all of which looked like paid reviews, so between the reviews and the press release, the company likely spent \$750 to generate \$360 in sales during the first month; even if it had 100 percent profit margins, this is not a good investment.

We can learn something from the top-selling omega-3 products on Amazon, though. Generally offered by established retail brands, these products end up generating much more revenue without a similar spend because they have existing brand equity from which to build their sales. For comparison purposes, we used RankTracer data and applied a regression with transformed variables model to sales ranks of the top 20 omega-3s on Amazon during March 2015, and estimated annual revenues based on their selling prices.

Top-Selling Omega-3 Products on Amazon		
Product	Daily Avg. Unit Sales	Est. Annual Sales
SmartyPants Gummy Vitamins with Omega-3 Fish Oil	621	\$3,760,000
Dr. Tobias Optimum Omega-3 Fish Oil	167	\$1,765,000
Kirkland Signature Omega-3 Fish Oil Concentrate	126	\$750,000
Nutrigold Triple Strength Omega-3 Gold	109	\$1,450,000
Nordic Naturals Omega-3 Fish Oil, 1,000 mg	96	\$1,290,000
Nordic Naturals Ultimate Omega, 1,000 mg	80	\$1,380,000
Now Foods Ultra Omega-3	78	\$568,000
Viva Labs Krill Oil	70	\$587,000
Nature Made Burpless Fish Oil 1,000 mg	47	\$182,000
Nature Made Fish Oil 1,200 mg	40	\$330,000
Manga Naturals Ultra Omega 3 Fish Oils	29	\$210,000
TheraTears 1,200 mg Omega-3	28	\$112,000
Coromega Omega-3 Orange Squeeze	25	\$194,000
Nordic Naturals Children's DHA	23	\$310,000
BodyVega Omega-3	20	\$145,000
MegaRed Extra Strength 500 mg	16	\$149,000
Barlean's Lemon Omega Swirl	15	\$110,000
Nature's Bounty Odorless Fish Oil, 1,200 mg	14	\$88,000
MegaRed Krill Oil, 300 mg	13	\$105,000
L'il Critters Omega-3 Gummy Fish with DHA	9	\$97,000

Source: Global Organization for EPA and DHA Omega-3s (GOED)



There are some names in the top 20 that are actually almost entirely sold on the Internet, such as Dr. Tobias, Manga Naturals and BodyVega. So that begs the question, how did these brands break the mold of the Amazon-only business model?



In part, it is because they advertise their Amazon listings elsewhere. If a consumer does a Google search for some of these products, rather than showing an ad that takes the shopper to the company's site, Google displays an ad that takes the consumer to Amazon. These companies have also done an effective job reaching out to popular bloggers and convincing them to review their products, or offering coupons on popular networks. These tactics are all effective ways to generate traffic to their Amazon listings, and once a consumer is on a listing, the conversion rates are fairly high compared to other mediums and channels.



One other thing to note, these top 20 products generate about \$13.5 million per year in retail sales. Some research suggests Amazon accounts for 60 percent of all Internet retail sales in the United States. GOED believes this estimate is high for omega-3 products because most established brands also generate direct-to-consumer sales on their own websites, which is not the case in other consumer product sectors. However, if we make highly imprecise assumptions that all the rest of the products on Amazon generate another \$1 million in revenue, and that Amazon accounts for roughly 10 percent of all Internet omega-3 sales, it means Internet sales of omega-3 products in the United States could be around \$145 million.



The key lesson is that even on the Internet, and Amazon specifically, normal rules of business still apply, despite the low barriers to entry. Companies must advertise and market their products to generate significant sales. The scale of sales in this channel is such that there is ample room for companies to succeed, but they must have the right strategy to drive consumers to their product listings—and without established brand equity, it takes more work. □

Adam Ismail has served as the first executive director at Global Organization for EPA and DHA Omega-3s (GOED) for more than eight years and oversees all organizational development for new and existing members. Since being named executive director in March 2007, Ismail has led GOED to experience a seven-fold growth in its membership and budget, worked on the founding of an international learning consortium based at Purdue University, and spearheaded overturning a ban on fish oil imports in Europe. With more than 10 years in the natural health and nutraceutical industries, Ismail's previous experience includes product development for Cargill Inc.'s omega-3 line and several years as a senior consultant for both Health Strategy Consulting and Health Business Partners. He holds an MBA from the University of Navarra's IESE Business School (Barcelona, Spain) and a bachelor's degree from Boston University's School of Management.

SupplySide Omega-3 Insights is the industry's premier destination for information about long-chain omega-3s to help companies innovate and market successfully to customers and potential clients. It focuses on the most pressing issues affecting the industry and delivers this information via premium content optimized for the web, including digital magazines, reports, case studies and more.

Vice President, Sales, Health & Nutrition

Danica Cullins danica.cullins@informa.com

Strategic Account Director **Amy Thorlin**

Senior Account Executives **Ioana Neacsu**
Anthony Arteca
Karen Salas

Content Marketing Manager **Karen Butler**
karen.butler@informa.com

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Art Director **Darcey Saxton**

Media Operations Manager **Melissa Ewing**
melissa.ewing@informa.com

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Published by Informa Exhibitions
3300 N. Central Ave. #300, Phoenix, AZ 85012
Phone (480) 990-1101 ■ Fax (480) 990-0819
Website: supplysideomega3insights.com