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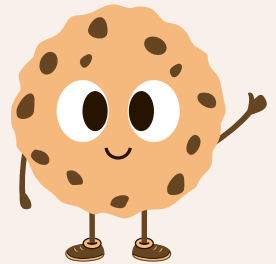


# Balanced Bites

## Superfood Cookies

### About The Business

Balanced Bites offers an equally healthy and delicious snacking experience for customers' indulgent cravings. Harnessing the power of natural superfoods, the company crafts Supercookies with targeted goals geared towards boosting physical and mental wellness throughout the day. Balanced Bites began operations in October 2023. The company's production is outsourced to a local manufacturer and stored at a warehouse in Tustin, California. Balanced Bites' commitment to accessible, healthier snacking led the firm to operate as an LLC, providing a balance of liability protection, operational flexibility, and tax efficiency.



### Why Cookies?

We chose cookies to provide consumers with a product that exudes familiarity and recognition. While many healthy snacks lack taste appeal and often take the form of bars, gummies, or powders, we've chosen to stay true to a family favorite treat that is not only delicious but also fun! Cookies resonate with a sense of comfort and enjoyment, offering a delightful snacking experience that aligns with our commitment to combining health and taste in a familiar package.

### Company Organization

Balanced Bites utilizes a circular company structure to create a unified and collaborative work environment. Balanced Bites has 33 employees in 7 departments: Finance, Marketing, Digital Media, Human Resources, Communications, Art, and Sales. The company's inclusive and self-supporting organization promotes cross-departmental work, collaboration, and accessibility.



### Mission Statement

*"Balanced Bite's mission is to redefine snacking by aligning health and taste using real foods and real benefits."*

# Business Rationale

## Problem Statement

The inaccessibility and lack of taste appeal in healthy snacks have led more than two-thirds of Americans to opt for ultra-processed treats, significantly diminishing the nutritional quality of their diets. According to a recent study, 67% of adolescents who consume snacks high in sodium and fats have lower dietary intakes of several micronutrients, especially vitamins A, C, and E. From Balanced Bite's market research, 53% of Gen Z admitted to often substituting these snacks for meals. The rise in the consumption of unhealthy snacks has been linked to a surge in nutrient and vitamin deficiencies. This exacerbates fatigue, decreased cognitive function, and stress levels in America's youth. As these issues become more ingrained in the younger generation's lifestyle, it poses detrimental to their physical and mental well-being.

## Solution Statement

Real Food. Real Benefits. Harnessing the power of natural superfoods, we craft unique cookies that are equally tasty and healthy. Packed with vitamins, our Supercookies combat dietary deficiencies and enhance the nutritional value of our customers' snacking experience. With targeted goals, each Supercookie has specialized flavors and superfoods that provide a calm, focus, and recovery snacking experience for everyone.

## Company Goals

### Short Term:

October 2025

**Goal:** Break even within our first year

**Strategy:** Increasing marketing budget by 2% each month by utilizing social media advertising and email marketing features to reach more consumers.

January 2024

**Goal:** Increase online sales by 4% by next quarter

**Strategy:** Launch our website by introducing our "Which Balanced Bites Cookie Are You?" quiz, increasing customer interaction and retention through our online database.

### Long Term:

April 2026

**Goal:** Establish sales contracts with school districts in California

**Strategy:** Contact school districts to secure sale contracts and offer Balanced Bites cookies during breakfast/lunch meals; driving a constant stream of revenue.

February 2026

**Goal:** Expand our product line to attract a wider target market

**Strategy:** Creating a gluten-free product line utilizing Cassava root; demonstrating inclusiveness to our target audience.

## Company CSR

### The Cookie Corner:

Balanced Bites recognizes the key dietary disparities children experience all over the country. We created the Cookie Corner, a seasonal cookie donation drive for children of low-income households to receive proper dietary nutrition.

## Product Overview



**chocolate chip**

**Cacao Beans (Primary)**  
Regulates blood pressure

**Maca Root (Secondary)**  
Promotes digestive wellness

High in Vitamin B1, B2, B12



**lemon lavender**

**Lavender (Primary)**  
Improves sleep quality

**Ashwagandha (Secondary)**  
Reduces stress and anxiety

High in Vitamin A & C



**matcha dark chocolate**

**Matcha (Primary)**  
Natural source of energy

**Baobab (Secondary)**  
Supports healthy metabolism

High in Vitamin K & B



**peanut butter banana**

**Peanut Butter (Primary)**  
High in protein and nutrients

**Hemp Seeds (Secondary)**  
Supports muscle recovery

High in Vitamin B3, B6, B2

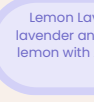
Balanced Bites presents customers with 4 unique superfood flavors: Chocolate Chip, Lemon Lavender, Matcha Dark Chocolate, and Peanut Butter Banana, complemented by new seasonal cookies quarterly. Each cookie is crafted with a primary and secondary superfood, delivering specialized health benefits. Our exclusive seasonal bundles feature new seasonal superfoods and a targeted snacking experience. This commitment to innovation ensures a continually fresh and health-conscious assortment for our customers.

## Flavor Profile



balance

Chocolate Chip, packed with flavonoids, helps improve blood flow to your brain and heart. Our classic cookie has Maca Root, aiding with insomnia, stomach distress, and moodiness.



Lemon Lavender combines antioxidants from lavender and the immune-boosting properties of lemon with Ashwagandha to aid stress relief and cognitive enhancement.

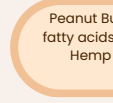


calm



focus

Matcha Dark Chocolate focuses on matcha's antioxidants for heart health and cognitive function, complemented by baobab to revitalize metabolism.



Peanut Butter Banana harnesses the omega-6 fatty acids in peanuts for heart health along with Hemp Seeds to support blood sugar and cholesterol regulation.



recovery

# Marketing

## Target Market

**Primary:** Gen Z students (ages 12 to 25) are most likely to indulge in snacks. Research finds that 60% prioritize on-the-go snacking due to busy schedules, and 70% value healthy options. Gen Z is the highest demographic that experiences nutrient deficiencies, which Balanced Bites aims to address.

**Secondary:** Parents of Gen Z children (ages 35 to 45) prioritize their kids' health when purchasing snacks. Balanced Bites offers a range of nutritious snacks designed to support their health and nutritional needs.

## SWOT Analysis

### Strengths

- Healthier snack alternative with clear benefits
- Seasonal cookies allow customers to explore unique flavors and nutritional benefits

### Weaknesses

- Limited flavor selection limits customers
- Strong reliance on customer loyalty due to smaller menu and bundle pricing

### Opportunities

- Expand to Canada
- Introduce new flavors to product line
- Potential to launch other different baked goods

### Threats

- Existing healthy snack brands with established reputation
- Must be aware of heavy regulations when catering to schools

## Business Risks

Balanced Bites' business model is highly reliant on recurring sales due to our limited product line. Therefore, our company heavily depends on customer retention. Secondly, some consumers may find it challenging to find value in healthy sweets rather than traditional options.



**Product:** Balanced Bites offers tasty and nutritious Supercookies. Our distinctive flavors paired with unique superfoods, provide customers with the balance, calm, focus, or recovery snacking experience they need.



**Price:** The individual cost per cookie stands at \$0.90, with a 64% profit margin, setting the cookie price at \$2.49. Our bundle pricing strategy lowers the unit price as packages get bigger, increasing purchase incentive.



**Place:** Balanced Bites' products are accessible online and in partnering retail stores nationwide. Sales are generated via our E-commerce website, Virtual Enterprise trade shows, and sales contracts. Moreover, we regularly host pop-up events to showcase seasonal product launches, enhancing brand exposure, revenue, and customer retention.



**Promotion:** As our primary market consists of Gen Z, we aim to leverage social media platforms like Instagram and Twitter to effectively advertise and promote our company. Throughout seasonal events, we offer our seasonal bundles featuring our specialty cookie. Furthermore, we arrange pop-up stores, offering customers a firsthand opportunity to experience and try these new products.



**Positioning:** Balanced Bites positions itself as a health-conscious and flavor-focused brand that aims to satisfy your hunger with an array of accessible and dietary-inclusive cookies! We emphasize this by creating delicious and distinctive cookie flavors with superfood profiles that aim to tackle unique health benefits like focus, calm, and recovery.

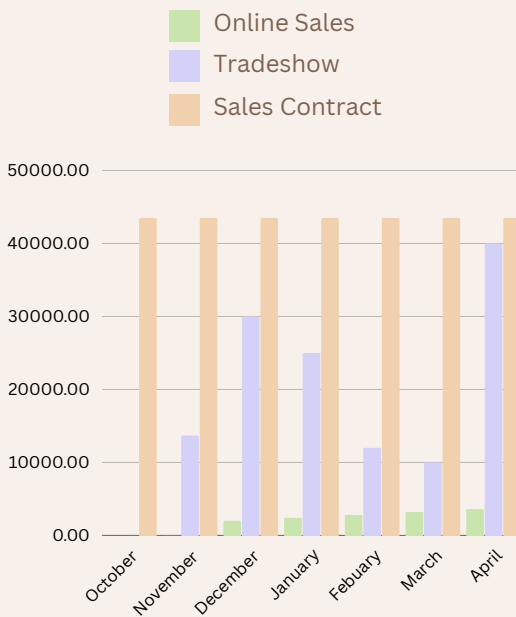
# Financial Highlights

## Projected Profit & Loss Summary

Gross Profit	\$1,049,014.68
Total Operating Expenses	\$841,924.22
Net Profit/Loss Before Tax	110,257.43
Net Profit/Loss After Tax	\$663,999.20
Retained Profit	\$31,513.34
*For the fiscal year ending April 30, 2024	

As depicted on the left, our anticipated sales gross profit is \$1,049,014.68. Balanced Bite's primary source of revenue comes from our cookie bundles sold in packs of 24 for \$28.99. From current trends of sales and taking into account our scheduled tradeshows, we're expecting a retained profit of \$31,513.34 by April 2024.

## Sales Projections



## Balance Sheet

Balanced Bites Balance Sheet As of January 31, 2023		Liabilities and Shareholders' Equity	
<b>Assets</b>		<b>Current Liabilities</b>	
<b>Current Assets</b>		Sales Tax Payable	\$5,221.42
Cash	\$85,921.97	Payroll Payable	\$64,091.95
Accounts Receivable	\$43,019.90	Payroll Tax Payable	\$19,059.37
Merchandise Inventory	\$24,220.80	Interest Payable	\$1,261.88
<b>Total Current Assets</b>	<b>\$153,162.67</b>	<b>Total Current Liabilities</b>	<b>\$89,634.62</b>
<b>Fixed Assets</b>		<b>Long Term Liabilities</b>	
Computers	\$3,131.21	Loan Payable	\$137,103.64
Office Equipment	\$999.89	<b>Total Liabilities</b>	<b>\$226,738.26</b>
Less: accumulated depreciation	-\$72.47	<b>Stockholders' Equity</b>	
<b>Total Fixed Assets</b>	<b>\$4,058.63</b>	Seed Investment	\$50,000.00
<b>Total Assets</b>	<b>\$157,221.30</b>	Retained Earnings	-\$119,516.96
		<b>Total Stockholders' Equity</b>	<b>-\$69,516.96</b>
		<b>Total Liabilities and Shareholders' Equity</b>	<b>\$157,221.30</b>

As of January 31st, Balanced Bite's Balance Sheet indicates our total assets of \$157,221.30, matching the liabilities of \$157,221.30. In February, we gained 2 angel investors that will contribute to our company, allowing us to increase our marketing budget and sales exponentially.

## Break Even Analysis

From our business contract alone, we are guaranteed 43,671 sales a month. Single cookies are sold for \$2.50 and the cost for each cookie is \$0.90, resulting in a gross profit margin of 64%. Balanced Bites is expecting to break even once 821,662 units are sold, being \$2,054,157.51 in sales revenue. Although we will not break even by April due to our high operating expenses, we hope to within the first operating year.

