

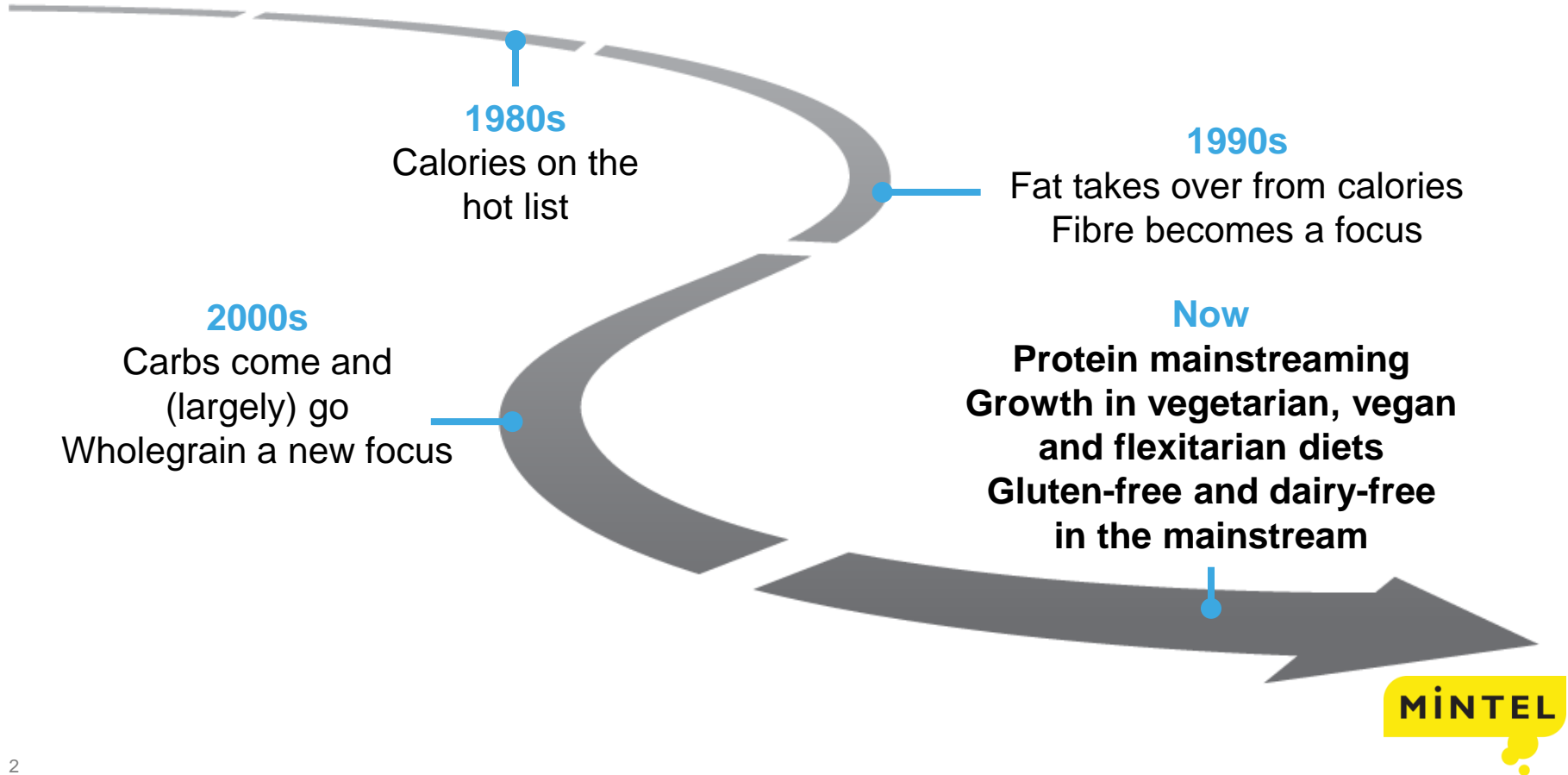


Food ingredients  
Europe

**Mintel**

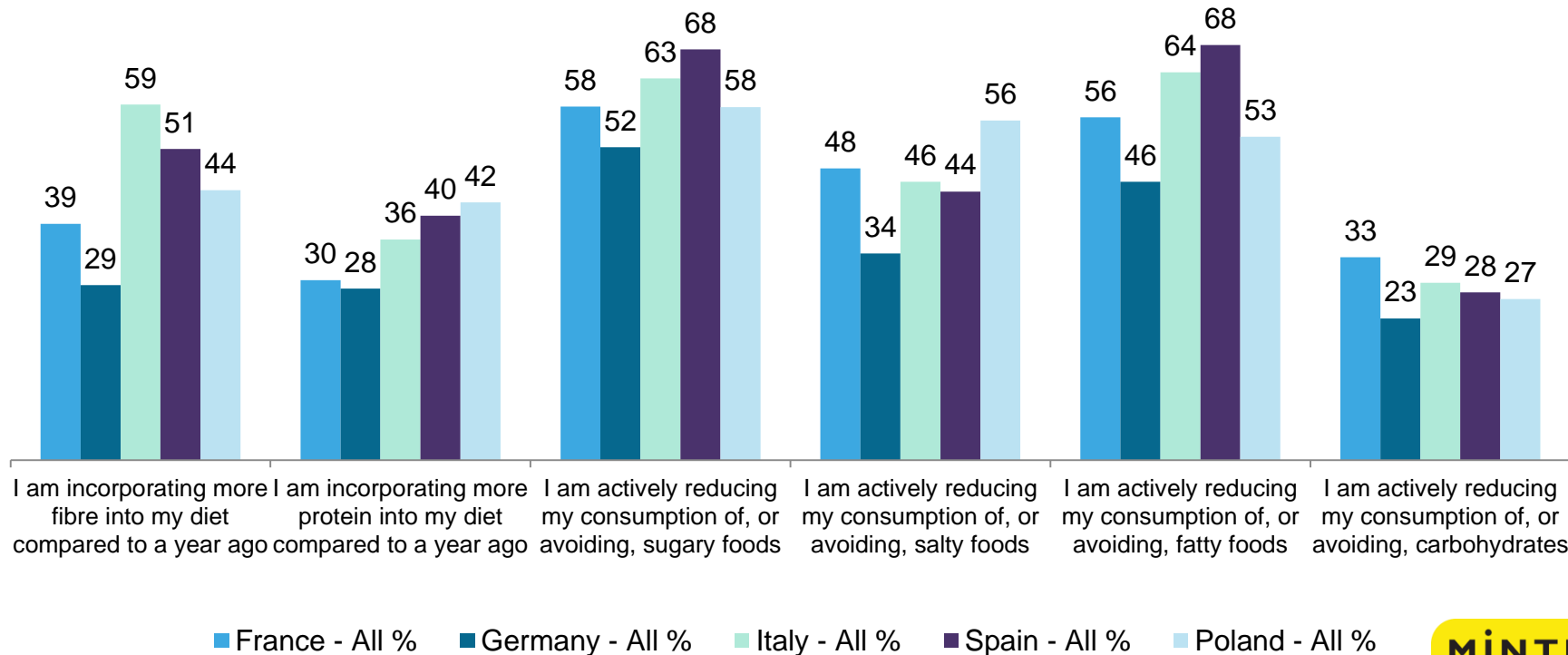
# Healthy Lifestyles

# Healthy eating used to be so simple...



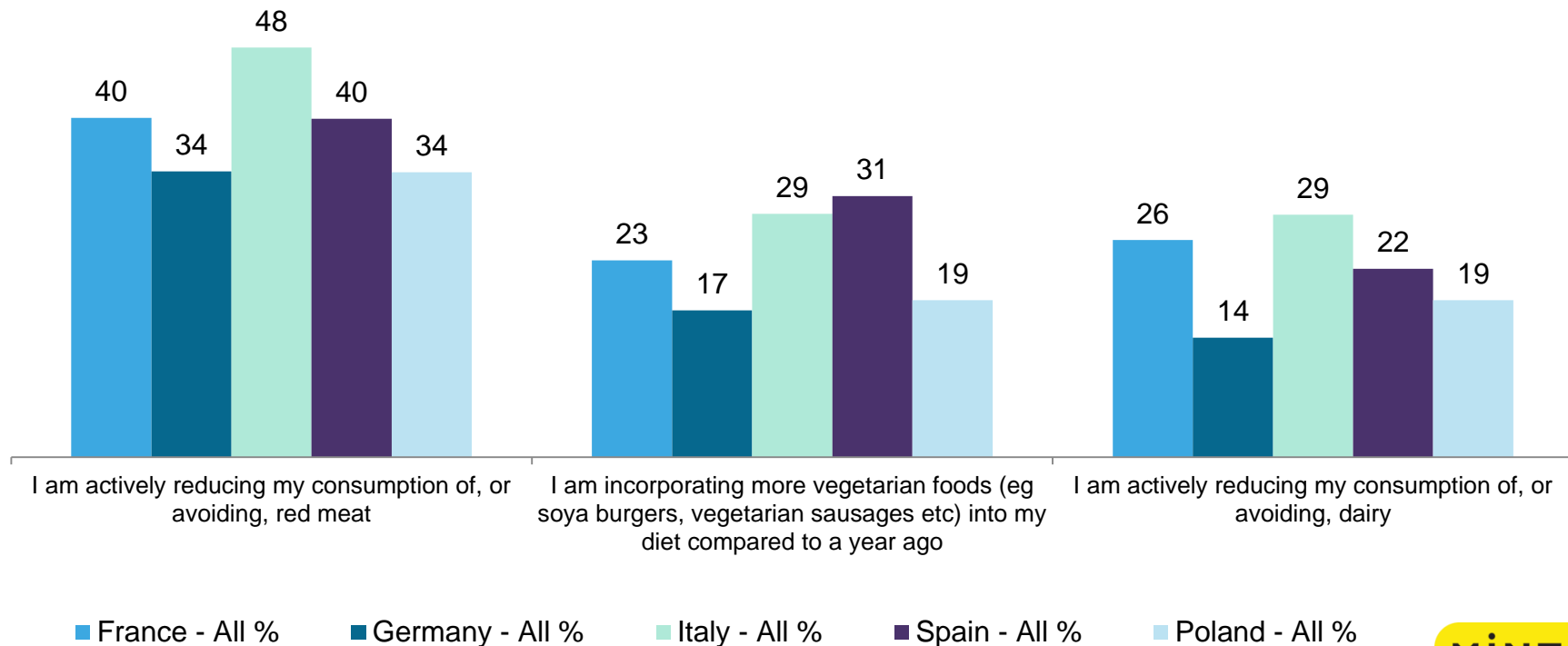
# but consumers diets...

Attitudes towards diet (2017 - Q4)



# are more complex nowadays...

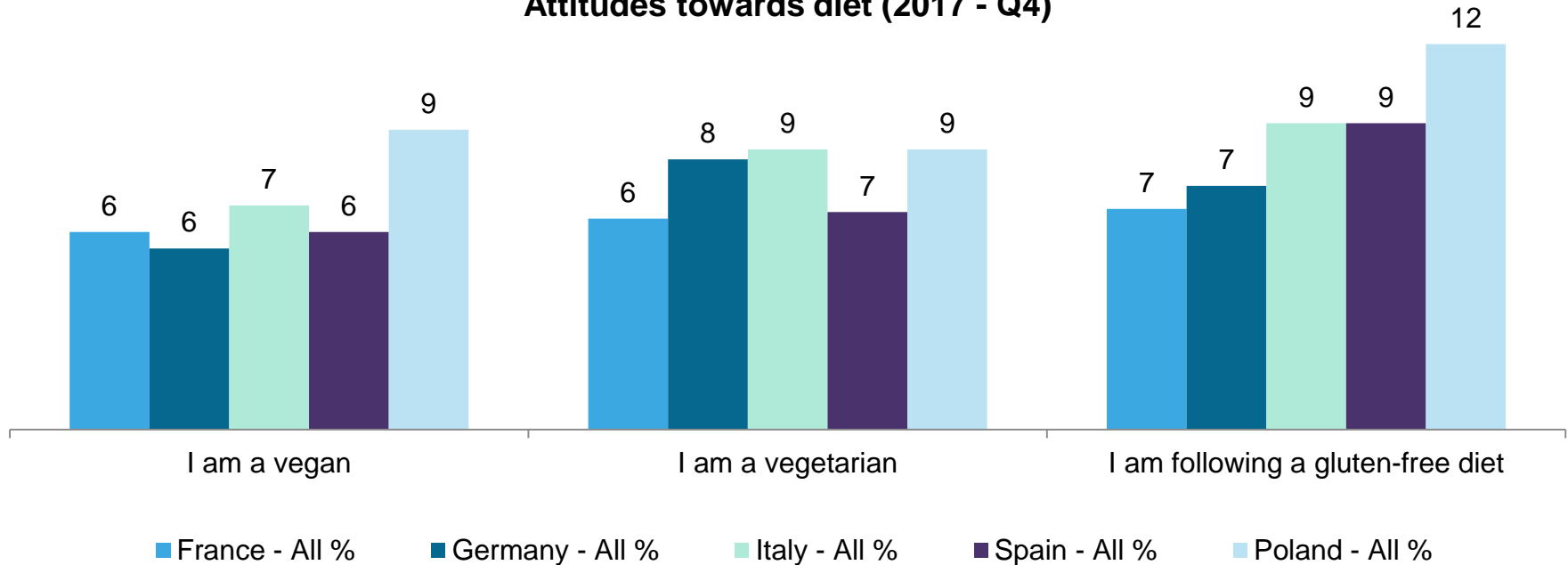
## Attitudes towards diet (2017 - Q4)



# while strict avoidance remains on stable level

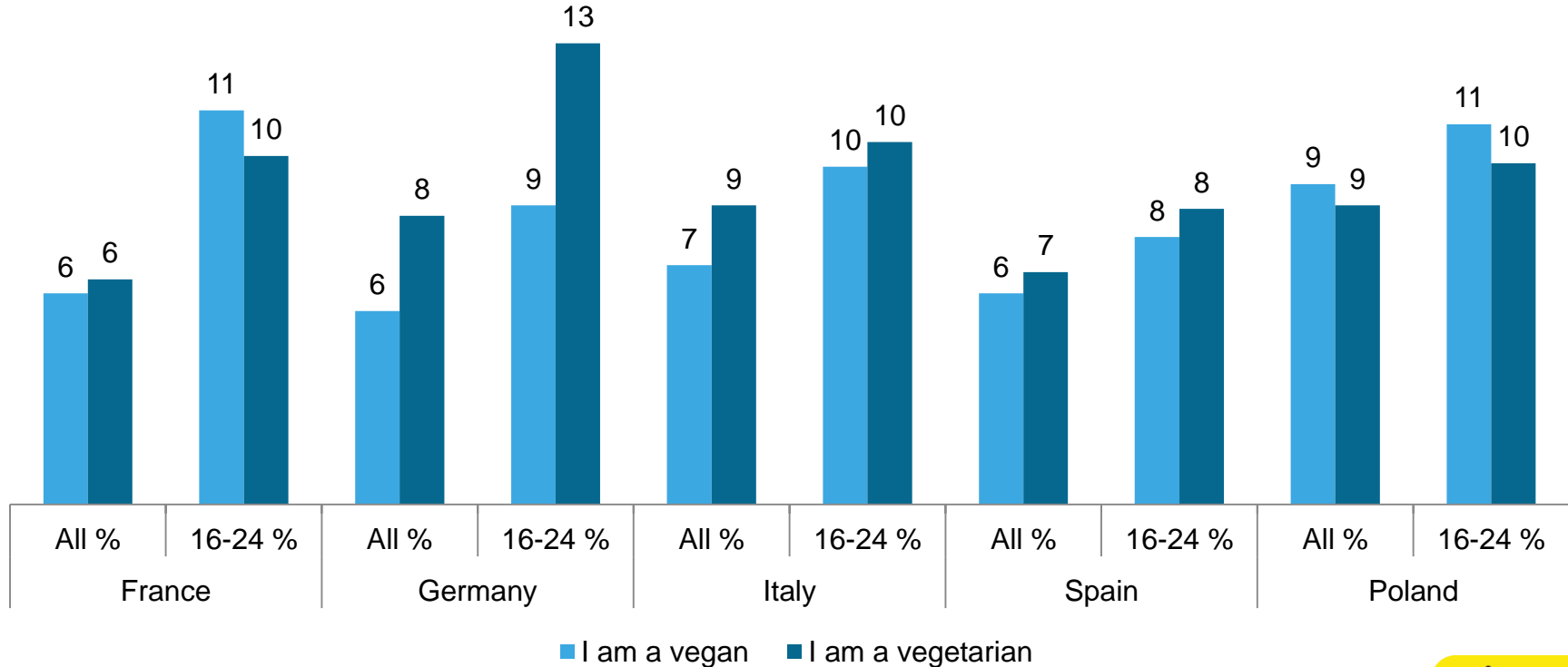
Percentage of consumers following strict avoidance of meat products, meat derivatives and gluten remains on the same level.

Attitudes towards diet (2017 - Q4)



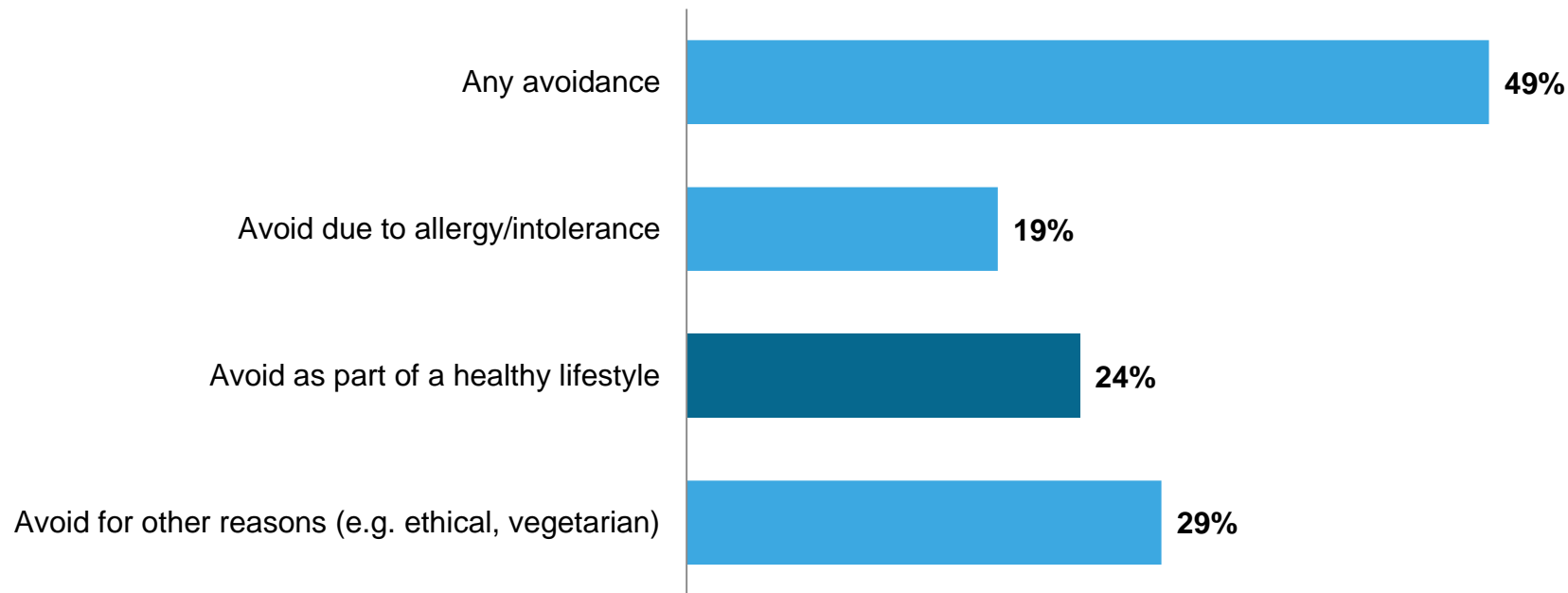
# Millennials especially look to veganism, vegetarianism

I am a vegan/vegetarian, Q4-2017



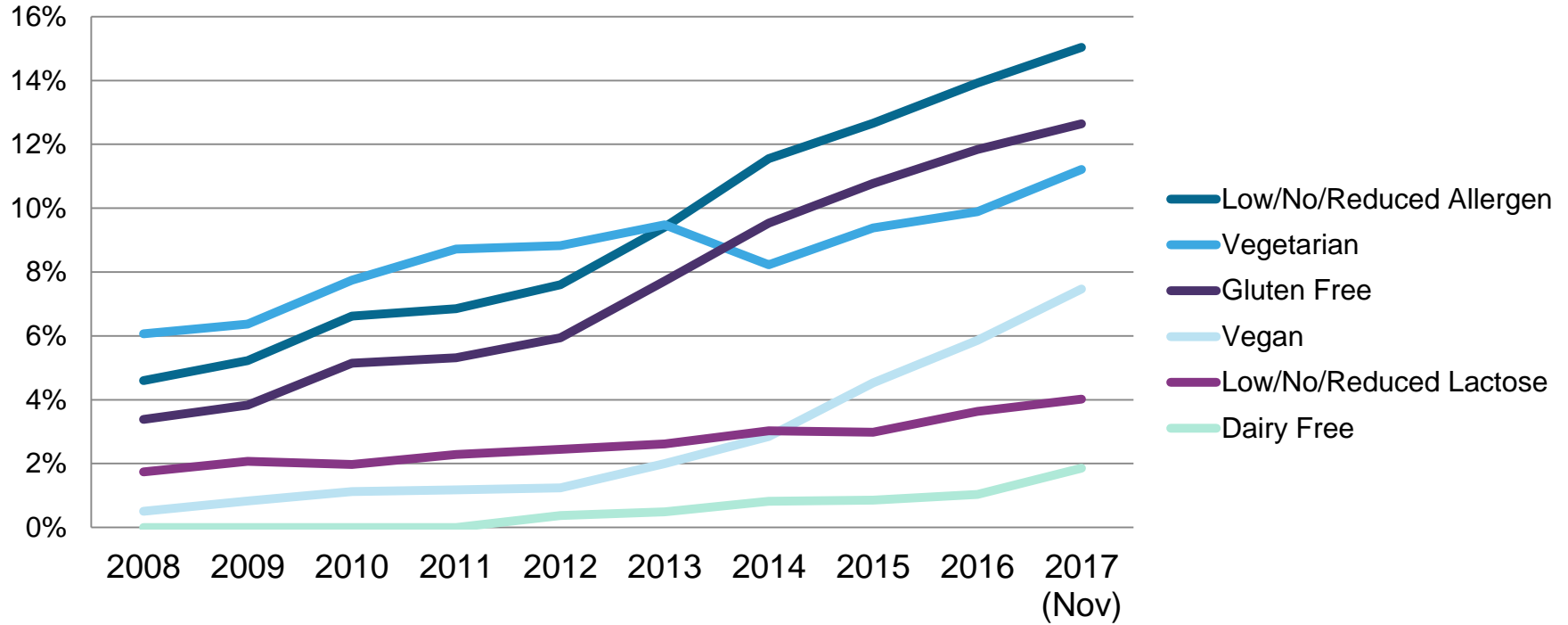
# 'Healthy lifestyle' is increasingly the key driver

UK, avoidance of foods/ingredients, by respondent or household members, by reason, September 2016



# And industry focus now is on free-from & healthy lifestyle foods

European food & drink NPD by selected claims, as % total





A close-up, slightly blurred photograph of a person's hand pushing a red shopping cart. The hand is wearing a dark long-sleeved shirt. The cart is a standard metal wire cart with a red handle. The background is a grocery store aisle with shelves of various products, mostly out of focus, creating a bokeh effect. The overall lighting is soft and indoor.

**What do consumers look for?  
How does industry respond?**

# Taste and texture become the focus as meat alternatives explore veggies and ancient grains

Consumers are looking to avoid animal products in their lives, whether all the time or to include some variety in their diets.

To appeal to flexitarians and give a less processed appeal many brands rather than "shouting meat alternative" explore vegetables, pulses, ancient grains, nuts and seeds.



**Hälsans Kök Quinoa & Broccoli Burgers** are made with quinoa, broccoli, kale and mint, Nestlé, Denmark



**Govinda Jack's Cubes** of Young Green Jackfruit with Spices, Govinda Natur, Germany



**Germinal Organic Amaranth Balls** with Carrots and Peas, Germinal Italia, Italy

# New ingredients provide protein from alternative sources

While ingredients like algae align well with the growing quest for both greener and naturally functional foods, they are still not a coined source for protein, with less than 10% of European consumers listing them as preferred “non-traditional” protein source.

As consumers continue not being in favour of traditional meat free protein sources, e.g. soya or whey, brands could profit from embracing more “pure” ingredients could help better target meat and non-meat eaters alike.



**Viva Maris Algae Sausage** made from Nordic algae. Viva Maris, Germany



**Alga Gurme Vegetable Burgers** with Basil and Kombu Seaweed, Bottega Vegetale, Italy

# Dairy alternatives are booming and enter new categories

With meat and dairy alternatives successfully fighting processed image, there exists opportunity to explore new ingredients and new categories for free-from ingredients.



**Fior di Loto Red Lentil Ravioli** with Tofu and Dried Cherry Tomatoes Filling is made with 36% red lentils flour. Il Fior di Loto, Italy



**OOmega Flaxseed Drink** contains stevia, is a source of omega-3 and omega-6 that can be beneficial to health. Concepts for Health, Netherlands

# No “nasties” products combine multiple free from claims

Increasing number of products launched in Europe combine multiple claims and tries appealing to consumers with more holistic approach.



**Mister Free'd Blue Maize Tortilla Chips** are vegan, free from wheat, dairy, GMOs and added nasties. Freed Foods, UK



**Yeo Valley Family Farm Bio Light Blueberry & Blackcurrant Greek Style Organic Yoogurts** contains 65 calories per pot, nothing artificial like artificial sweeteners or no 'nasties', is high in protein, gluten free and suitable for vegetarians. Yeo Valley, UK



**GoPure Crinkle Paprika Flavoured Crinkle Potato Chips** are an organic vegan product, free from gluten and nasties. Yellow Chips, Netherlands

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## Often confused by all available options, consumers look for balance

**35%**

of European consumers (45% French) are  
prepared to change their lifestyle to be  
healthier, but

**about 30%**

of consumers in Germany, Spain and Poland  
admit, that all the different advice on keeping  
healthy can be confusing

## Often confused by all available options, consumers look for balance

Determining the elements of a healthy diet can be a source of negativity because consumers are bombarded with potentially conflicting reports as to which ingredients are recommended and which ones should be avoided.

Aversion to specific ingredients is only likely to expand as more cities, counties, states and countries implement taxes, labeling and other mandates in order to raise awareness about the potential health impacts of sugar, salt, fat or other avoidable ingredients.

## SELF-FULFILLING PRACTICES

As more people find modern life to be hectic and stressful, flexible and balanced diets will become integral elements of self-care routines.



Mintel Food and Drink 2018 Trend

# Brands offer vitality and balance

The vegan product is made on naturopathic principles with coconut oil which contains medium chain fatty acids which are digested and used in the body as energy.



**Primrose's Kitchen Raw Carrot, Apple & Cinnamon Muesli** features a vital and wholesome combination of gluten free oats, 22% raw carrot, apple, cinnamon, nuts and seeds with chia seeds and psyllium husk. Primrose's Kitchen, UK

Blend of the finest organic ingredients especially made to specific health and well-being needs, said to de-stress and energise.



**Karma Organic Teas Tulsi Boost Tea** with Turmeric, Ginger & Lemon is described as a delicious. Vest Pharma, Norway

Rather than offering specific nutrition values, some brands turn to a more holistic approach and emphasize wellbeing and vitality.

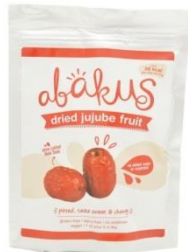


# Ancient medicine caters to wellbeing holistically

As consumers are turning to food, drink, and healthcare products to address their emotions or mood and lack of energy or sleep, opportunity exists for botanical/herbal adaptogenic ingredients to be applied in products that support stressed consumers.

The use of traditional medicine ingredients such as ashwaganda (Ayurveda) and jujube (Traditional Chinese Medicine) will appeal to consumers who are looking for products with naturalness and holistic attributes.

Traditional Chinese Medicine to promote longevity, vitality and wellbeing



**Abakus Dried Jujube Fruit.** According to the manufacturer, jujube fruit has been enjoyed as longevity berry in Asia since thousands of years. Abakus Foods, UK

Traditional Indian medicine Ayurveda to support immune health, digestive function and protein utilization



**Tandoori Turmeric Activated Superfood Popcorn** features freshly ground spices like coriander, cumin, chilies, turmeric extract, ashwagandha extract and 2 billion CFUs of probiotic cultures. Living Intentions, USA

# Empty calories are out, nutrient dense food is in

Today's consumers are looking to get more out of their food and the brands they support.

product provides a pure energy boost with protein and iron-rich chia seeds from Peru paired with nutrient-dense Ecuadorian goldenberries



**Terrafertil Nature's Heart Golden Berry & Chia Andean Superfood Smoothie** is said to be a source of fibre, contains no added sugar and provides 10g of plant protein and 83.5mg of vitamin C, which is 100% recommended daily value.

Terrafertil, UK

said to be developed using nutritional science, contains a combination of ingredients with higher nutrients density so that they can be easily absorbed by the body



**Nu+Cao Raw Cocoa, Hemp Seeds and Hazelnut Bar** is a natural, raw, and vegan product is free from gluten, lactose, synthetic additives and preservatives. It is low in carbohydrates with at least 30% less than comparable products, and naturally rich in magnesium, iron, antioxidant and omega 3. Nutritious Solutions, Germany

said to be unapologetically delicious and coincidentally nutritious



**Shelby's Healthy Hedonism Cashew Blueberry Coconut Bar** is made from local and imported ingredients and free from gluten, artificial colours and flavours. This product contains good fats, natural colour and flavour, is. Rousche Group, Australia



**Fréyda's Super Charged Food Handcrafted Oat and Seed Bar** with Goji & Hint of Fennel is made with **wholesome ingredients** such as oats and super seeds to be charged up with **essential nutrients**, is a source of fiber and contains **no GMO, nasty additives or trans fat**. Freyda's Pantry, UK

**MINTEL**



A heart-shaped wooden bowl is filled with a variety of healthy foods, including a green apple, a red onion, a tomato, a beet, a broccoli, a cauliflower, a bunch of red berries, and a mix of white and yellow grains. A stethoscope is resting on the bowl, symbolizing the connection between diet and health.

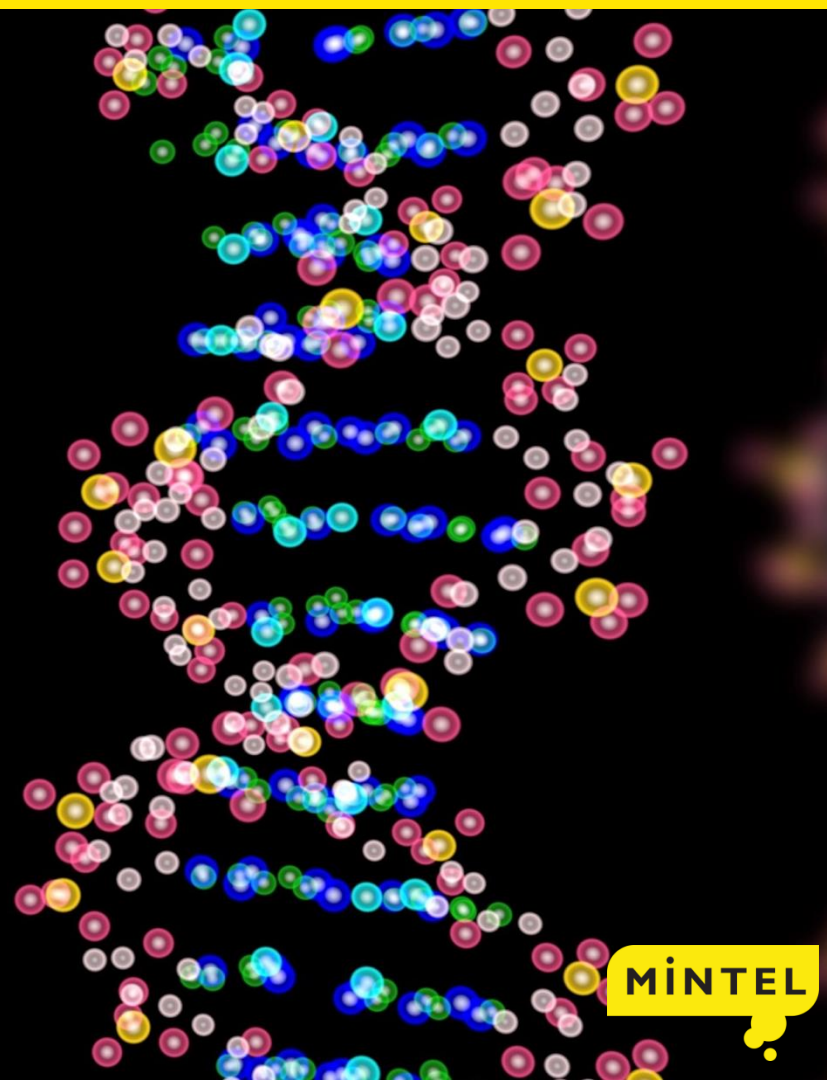
# What's next?

# Personalization: Diet By DNA

When it comes to their diets, more people are recognizing that there might be a plan or specific rules that work best for their personal lifestyle, biology or medical history. This has been shown as consumers investigate whether they have allergies or insensitivities.

Meanwhile, other people add supplements or functional foods in the hopes of improving how they feel.

Advances in technology further these personal quests as wearable fitness devices and high-tech tests collect and analyze data on our bodies and habits.





# Personal ancestry could dictate diet

If more people learn about their ancestry, this research could inspire them to focus their dietary inspiration on the countries or regions where their ancestors had lived. This could find consumers placing less emphasis on superfoods from exotic locations and more on ingredients that are native to the geography where their ancestors lived.



## **Sambazon Acai Chocolate + Chocolate Chip Sorbet, US**

“Acai has long been treasured by natives in the Amazon for its restorative powers”



## **Daylesford Organic Outdoor-Reared Chilli & Coriander Pork Sausages, UK**

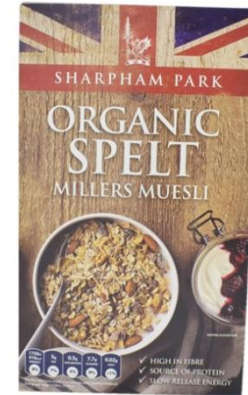
Claims to choose “British breeds who thrive in their native landscape”

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Brooklyn Town Large Classic Beef Burgers are made in a homemade and traditional way with pieces of **beef** selected from native breeds.



Sharpham Park Organic Spelt Millers Muesli is made with locally farmed **spelt** which is said to be grown in Somerset since the start of the Iron Age.

# Personalization increasingly in demand and possible



US genetic mapping service 23andMe promoted its \$199 test on Instagram in late 2015. The ad suggests that the test can help people discover the links between one's DNA and their diets, including caffeine consumption.



Habit is a US start-up designed to provide customized recommendations or prepared meals based on a person's biology, metabolism and personal goals. Campbell Soup invested in the service, which plans to release its first meals in 2017/2018.



Copenhagen-based start-up AthGene creates custom health plans based on a person's DNA. It can provide people with plans to optimize sleep patterns, exercise regimes and diet with monthly feedback provided based on future samples.

# Detailed diagnostics could unlock opportunity for smarter avoidance

Asian tradition connects  
blood type with diet



## D'Adamo Personalize Nutrition Unibar Blueberry Almond Protein Bar, UK, April 2015

Product claims to be the only protein bar right 4 your type, based of D'Adamo's Blood Type Diet.

In combating diabetes, proper diet and nutrition is essential and Glycemic Index (GI) plays a big role on managing it

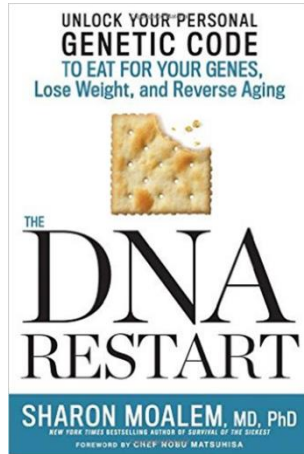


## Pic's Crunchy Peanut Butter, Pic's, UK

“contains 25% more good fats than non hi-oleic peanut butter, provides 30% pure protein per serve and is free from added sugar, oils, features a low glycemic index”



# Opportunities exist to explore new areas for personalization



A recently published book 'The DNA Restart' claims that the best weight-loss solution lies within the DNA. The diet-plan covered in the book shows the reader how to determine the right quantities of the macronutrients protein, carbohydrates and fat for their individual genetic make-up.



DayTwo provide users with personalized nutrition and behavioural recommendations based on their personal health records and their specific gut microbiome composition. Its scientific approach to nutrition translates each person's unique gut microbiome and other individual metrics into a personalized actionable plan.

# Conclusions and points for the future

## **No going back?**

Consumers, especially Millennials, adopt healthy lifestyle habits, and buy from a broader (and different) repertoire than ever before - we are all flexitarians!

## **A diet revolution**

A fundamental shift in consumer behaviour – free-from foods are a choice for the majority. However, with choice comes a lot of confusion and stress.

## **Positive messaging needed?**

With growing choice and (often) contradictory messaging about what to eat and what to avoid, some brands might tap into a more positive and holistic approach.

## **Personalization could be the golden mean**

With developing technology leading to better collecting, diagnosing and identifying individual's needs, more brands have opportunity to explore more targeted positioning. "Old" or "ancestral" products, as well as products targeted at very specific needs and preferences have potential to exist along more holistic ones.

# Thank you!



**Agnieszka Grygier**

Client service manager

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