



## Industry leaders speak

### Bianca Rootsart

Director, Dutch Coeliac Society (NCV)



**Is the gluten-free sector still growing in the Netherlands?** "Yes, but less rapidly than last year. We see a certain stabilization in the market. When talking about a sustainable market, coeliacs are a more reliable group to target than those consuming gluten-free products for lifestyle reasons." **What are retailers in the Netherlands looking for from manufacturers?** "More trendy gluten-free food products." **What about consumers?** "Dutch coeliac consumers are looking for fresh (daily) and healthy gluten-free products in their local supermarket. Gluten-free consumers – particularly those on a gluten-free diet for medical reasons – would like to be 'normal' consumers with easy access to a wide selection of fresh products. Price remains a huge issue in the Netherlands where coeliacs do not receive any reimbursement from the government. But safety always comes first." **Are Dutch supermarkets doing enough to support people seeking gluten-free products?** "I think they can do more. During 2015, the Dutch Coeliac Society saw an enormous increase in product recalls. Supermarkets need to be more proactive in checking if certain products are labelled correctly. This situation forced more coeliacs to rely more on dietary and officially licensed products than they already did."

Website: [www.glutenvrij.nl](http://www.glutenvrij.nl)

### Marten Paasman

Global Business Manager, DSM Food Specialties B.V.



**How would you describe the current and future lactose-free market?** "It has grown substantially in recent years and is likely to continue, especially in Latin America (around 10% from 2014-2019) and Europe (around 8% from 2014-2019). Thanks to advances in process and enzyme technology, really good lactose-free plain milk products are on the market, tasting as good as fresh milk. Also, you see a wide range of lactose-free yoghurts, ice-cream, fresh cheeses, dairy spreads, etc. So there is no longer any need to avoid dairy if you are lactose intolerant. I expect this trend to continue, with many new product launches, including flavoured milks, milk chocolate and milkshakes in food-service." **What are retailers looking for from manufacturers?** "Products that can create high margins and good volumes. However, the volume of products sold can be a concern. In certain eastern European countries, lactose-free is not yet well known and products can struggle to meet the turnover and volume criteria that retailers set. It's different in Finland, where more than half the products in the fresh dairy section of the supermarket are lactose-free." **What are consumers looking for from supermarkets?** "A lactose-free variant for everything that is dairy based – and tasting as good as the regular product. This consumer demand for more lactose-free options was confirmed in a recent consumer survey commissioned by DSM in Finland, China and Colombia. We asked over 3,000 consumers about their perception and preference for lactose-free dairy. The results will be presented by DSM at the Expo."

Website: [www.dsm.com](http://www.dsm.com)



## Industry leaders speak

### David Jago

Director of Innovation & Insight, Mintel



**What's your view of the free-from market?** "In recent years it has seen substantial value growth in key countries in Europe and North America, outpacing growth in most food categories by a significant margin." **Why is this?** "The incidence of allergy and intolerance may be on the rise in some parts of the world, but that alone does not even begin to explain market growth. Self-diagnosis is now more common, and celebrity endorsement attracts new (young) users to free-from foods. For example, some 7% of German consumers say they are following a gluten-free diet, but that rises to 11% of Germans aged 16-24 years, indicating a market trend that resonates well with Millennials (young adults). Other factors, notably the concept of a "generally healthy lifestyle", are pushing free-from further mainstream." **So new product development in free-from foods is soaring?** "Yes; numbers of new products coming to market are up across countries and categories. Specialist suppliers are becoming more international in their scope and reach, while major multinational players have joined the market." **Where does the future lie for free-from?** "Opportunities lie in further development of dairy milk alternatives, gluten-free snacks, and better nutritional profiles of gluten-free foods – perhaps building on the growing popularity of ancient grains and seeds to raise the health positioning of gluten-free. Mintel sees free-from foods not as a fad, but as an important longer-term trend that still has room for development and which will remain an important segment of key food markets for years to come."

Website: [www.mintel.com](http://www.mintel.com)

### Hamish Renton

Managing Director, Hamish Renton Associates



**What market changes have you noticed recently?** "Having been working in the Free From category since 2003, the category is really taking off. We are being asked to do more and more work in the Free From area. Gluten Free is becoming the new normal. It's increasingly available in stores – but food service (eating out) still has a long way to go." **What trends do you expect to see?** "Convergence of Free From with more broad Health and Wellness trends. More convenience, on-the-go products, wider product ranges, more products with additional health benefits." **Has Free From food spread to more regions?** "Yes, there is good growth in Russia and in eastern Europe – although the UK, Germany, Italy and France remain the powerhouses of demand in the EU. The US market continues to be significantly ahead of the Canadian market." **Are consumers satisfied with what they can purchase?** "Healthiness is a growing requirement – Free From consumers are less accepting of high levels of fat and sugar in their Free From products – and why would they be? Brands and retailer own labels need to up their game to meet consumer demand." **What about pricing?** "There is greater awareness from shoppers of pricing – especially products where the "Free From premium" is hard to justify."

Website: [www.hamishrenton.com](http://www.hamishrenton.com)



## Industry leaders speak

### Cristina Lazzati

Editor, GDO Week Italy



**Is the Free-From sector still growing in Italy?** "Yes it is, under pressure of consumers who are increasingly attentive and demanding, and who are looking for a source of well-being and nutrition in their food. In addition, people with dietary intolerances are increasingly aware that tasty food items specifically for them can be found on supermarket shelves." **Where are Free-From products located?** "Usually close to the organic or vegan areas. Gluten-free products are at the top of the list, thanks partly to the favourable exemptions that are offered by the regions to certified celiac patients. In some chains, lactose-free products are being increasingly seen in the refrigerated area. Sugar-free and fat-free products, which have been present for a number of years, are distributed alongside conventional products in the relevant categories." **How are Italian manufacturers supporting Free-From?** "They are developing Free-From products with tastier recipes and more attractive packaging. This is good because it means that Free-From is now coming 'out of the ghetto' of dietary foods." **What about future trends in Italy?** "A clear trend is the development of Free-From products designed for children. Here in Italy, the problem of child obesity begins to be seen. Furthermore, the world of pets is not exempt. This market in Italy is growing at a steady and double-digit rate and today witnesses a dramatic increase in Free-From products."

Website: [www.gdoweb.it](http://www.gdoweb.it)

### Stephen Wynne-Jones

Editor, ESM: European Supermarket Magazine



**What are consumers looking for from supermarkets, when it comes to Free-From Foods?** "After several years of evolution, the Free-From category has secured its place in most European supermarkets, generally in a dedicated section or aisle space. I believe the next evolution, however, will be for Free-From foods to permeate other categories, and become part of the everyday shop, rather than a specialist purchase. The quality levels are there, but it's time for supermarkets to acknowledge that, by offering a wider variety of positing in-store." **Are brands offering sufficient value for money?** "Value for money will continue to be a key consumer consideration. However, the wide variety of private label Free-From options now available has led many leading brands in the category to re-evaluate their pricing structure. This can only be a positive development for the sector - the high price of items (including many staple goods) remains a barrier to purchase for many consumers." **What can supermarkets do better?** "I believe more could be done in smaller-format stores, such as convenience and forecourt operators, to offer a greater range of Free-From options. In these sectors, food-to-go is a core sales driver, and given the lack of brand penetration in this market, Free-From foods are often overlooked. Retailers could work to develop more Free-From options in these sectors as an added-value option for consumers."

Website: [www.esmmagazine.com](http://www.esmmagazine.com)

## Industry leaders speak

### Daide Venturi

Molino Nicoli S.p.A.



**Since when is Vitabella part of your new product line?** "We launched the Vitabella brand for Pharmacy Channel in Italy three years ago. Two years ago we decided to redesign the logo and packaging and added value to the brand with a new organic and gluten free product line for the launch in the USA and now also Europe." **How does Vitabella sets itself apart from other (gluten free) products?** "Our mission as an Italian gluten free food manufacturer is to have no compromise on taste at all. Furthermore we have full control on the supply chain for the main raw materials (corn, rice, oats) so we can guarantee constant quality and safety of our products. We plan to launch new Vitabella products soon, offering additional health and environmental claims, such as 'lactose free' and 'palm oil free', with the aim to be recognized as a brand with a wide offer of great tasting products, suitable for people who suffer from the most common intolerances." **Why is the consumer happy with Vitabella?** "We created a consumer panel test in the USA. Celiacs especially enjoyed our Pillows and overall they appreciated the certification (<10 ppm) and dedicated facility for gluten free products. Also, we received two golden stars from the International Taste and Quality Institute for our Chocolate and Hazelnut Pillows. We are committed to keep the highest standard for our Vitabella lines in order to gain the appreciation and trust of our consumers."

Website: [www.molinonicoli.it](http://www.molinonicoli.it)

### Antonio Rotunno

Operational Director, BioAlimenta Srl



**What is the status of the Free-From sector in Italy?** "The Free From sector is slowly but steadily growing in Italy. During the past 12 months, specialty stores and mass market retailers have dedicated more attention to the Free From sector, and I foresee this positive evolution continuing." **What are retailers and consumers in Italy looking for from manufacturers?** "A wider variety of products of higher quality, with improved taste and special attention paid to nutritional value. Italian consumers generally read descriptions on food packaging, so are educated and demanding customers. Certainly the value for money can be improved, but I think we are getting there." **What can Italian supermarkets do better?** "I believe they are doing quite a good job, but nevertheless they can still improve the variety of products offered." **What's your opinion about the increasing appearance of Functional Food and Organic next to Free-From?** "It is a natural consequence to meeting people's needs for safety and clarity in food. I believe a next step will be mixing different positive effects in the same functional food."

Website: [www.bioalimentasrl.it](http://www.bioalimentasrl.it)



## Industry leaders speak

**Marjan van Ravenhorst**  
Consultant, Allergen Consultancy



**What is your view of the current situation regarding food allergens?** "We notice that the number of allergen tests and analyses being performed continues to rise. There are various reasons for this. One is that extra attention is being paid by producers to validate cross-contamination in their production processes. Another is the increase in the number and range of free-from products." **What's the link between allergen tests and free-from products?** "Analysis of allergens is used to positively verify a claim of a product being allergen-free. This could be prior to the product being released on the market, or a periodic analysis conducted on a regular basis." **Does allergen testing have limitations?** "Yes. False or negative results, suppression of analysis or wrong target protein are some issues we are confronted with in daily practice, regardless of whether an analysis is performed very quickly or by an accredited laboratory." **How can Allergen Consultancy help?** "We have set up a laboratory service to provide guidance regarding the selection of the correct method and how to interpret results correctly. We also offer classroom courses, e-learning and training films. We have also developed a practical course aimed at manufacturers of pre-packaged foods that instructs them on what really matters in a good and practical allergen management system."

Website: [www.allergenconsultancy.nl](http://www.allergenconsultancy.nl)

**Abigail Stevens**  
Business Development Assistant, The Vegan Society



**What are consumers looking for in free-from food?** "It is important that free-from food is readily available for a reasonable price and that it tastes as good as, if not better than its equivalent, in order for companies to profit in the mainstream market and for consumers to re-purchase these products." **Are consumers satisfied with the product range available?** "Despite a large volume of new vegan alternative foods appearing on the market, there is demand for large existing companies to remove unnecessary animal ingredients from convenience foods such as crisps, sauces and gluten-free bread to make them suitable for vegan diets." **Does free-from food get sufficient attention in the supermarkets?** "There are more dedicated free-from food sections in supermarkets. However, supermarkets could benefit from moving these sections into a more prime position with more deals so that consumers can access them easier." **What are your specific objectives in attending the Expo?** "We are offering companies the opportunity to be registered with the internationally recognised, longest standing Vegan trademark scheme so that they can broaden their appeal to health-conscious, eco-conscious and ethical consumers."

Website: [www.vegansociety.com](http://www.vegansociety.com)