



A Diet Revolution

Free From Food Expo, Barcelona, June 2017



FREE FROM
FOOD EXPO

Healthy eating used to be so simple...

1980s

Calories on the hot list

1990s

Fat takes over from calories
Fibre becomes a focus

2000s

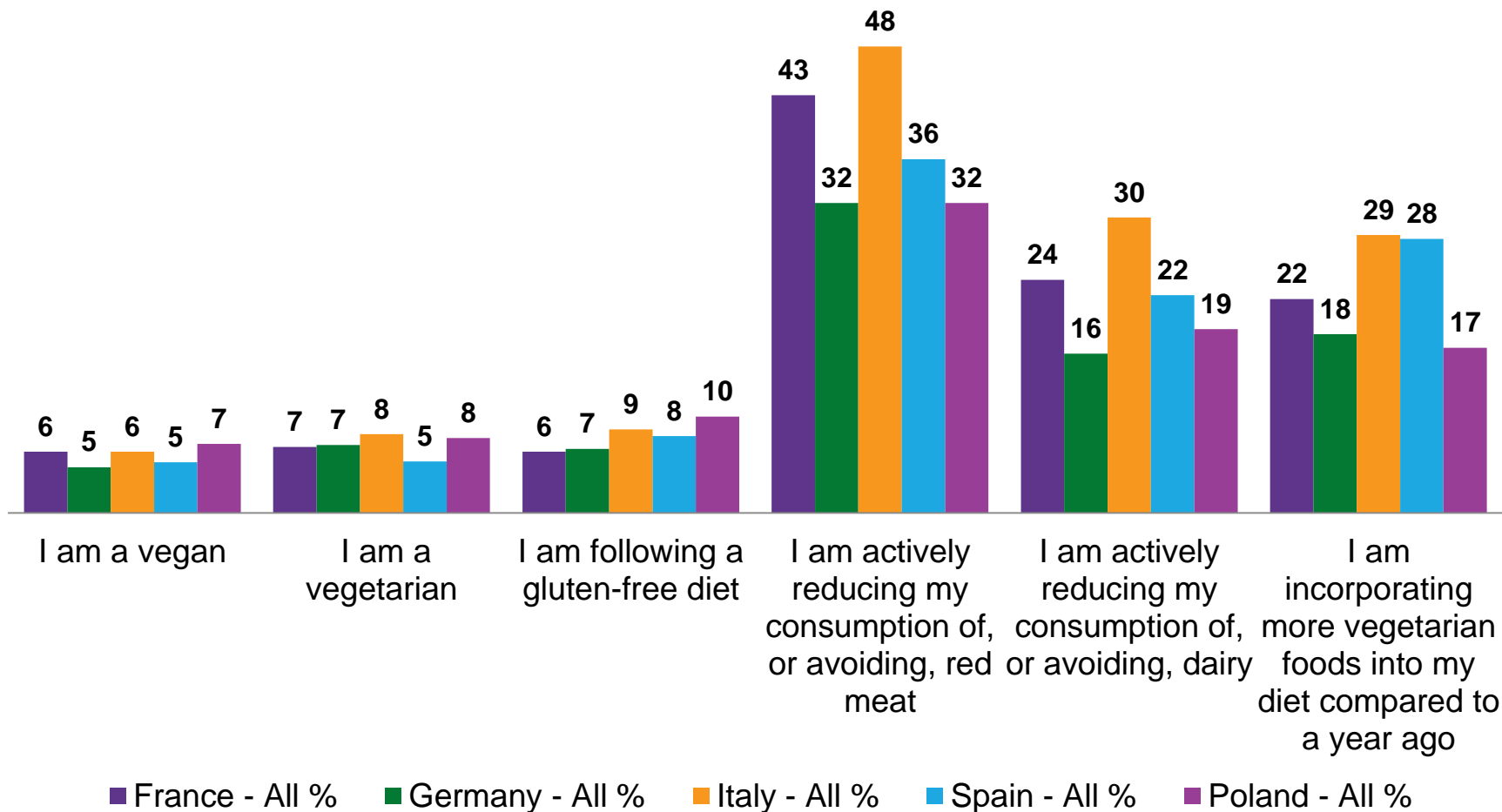
Carbs come and (largely) go
Wholegrain a new focus

Now

Protein mainstreaming
Growth in vegetarian, vegan and flexitarian diets
Gluten-free and dairy-free in the mainstream

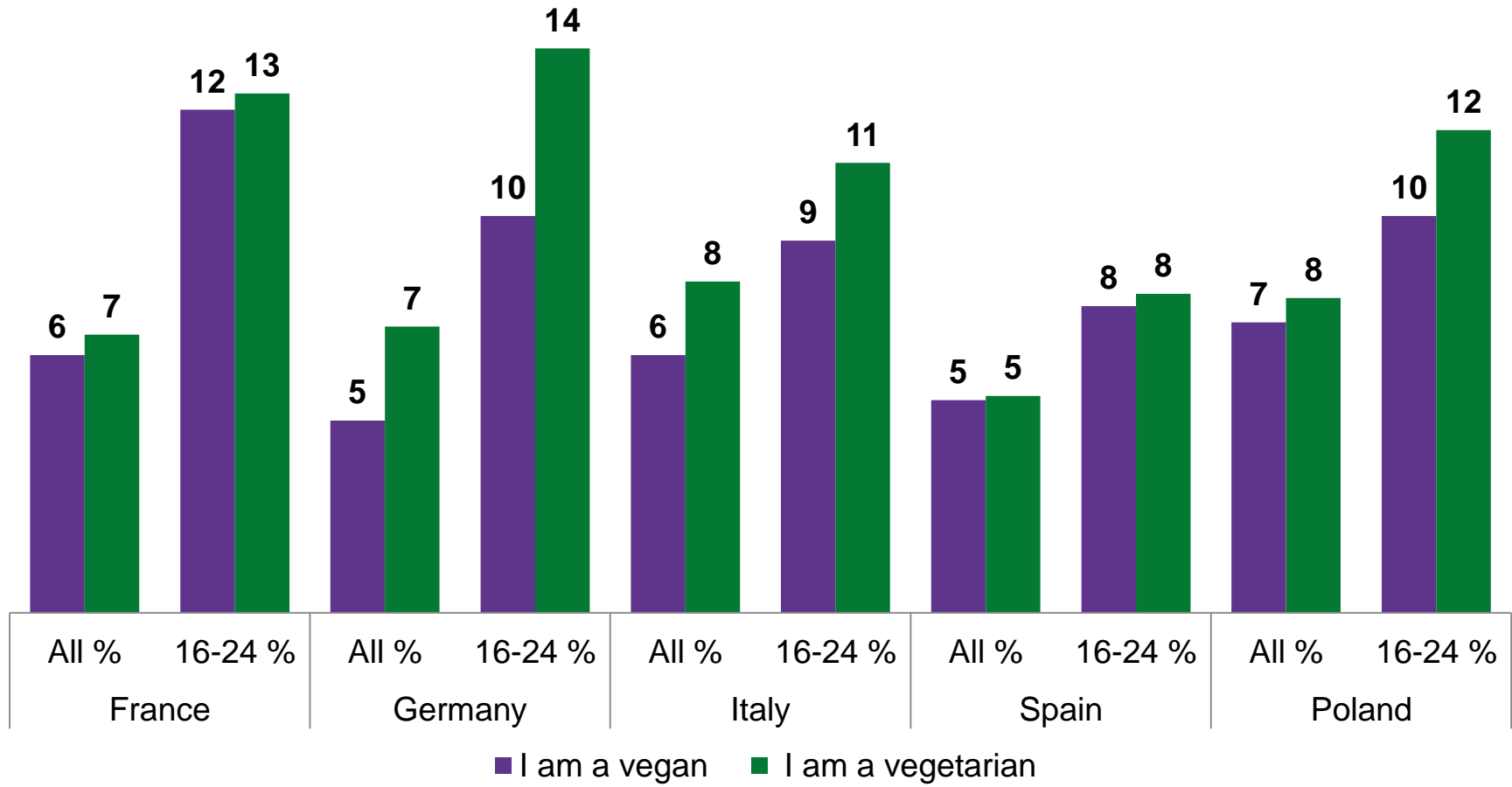
But consumers diets are more complex nowadays...

Attitudes towards diet, Q1-2017



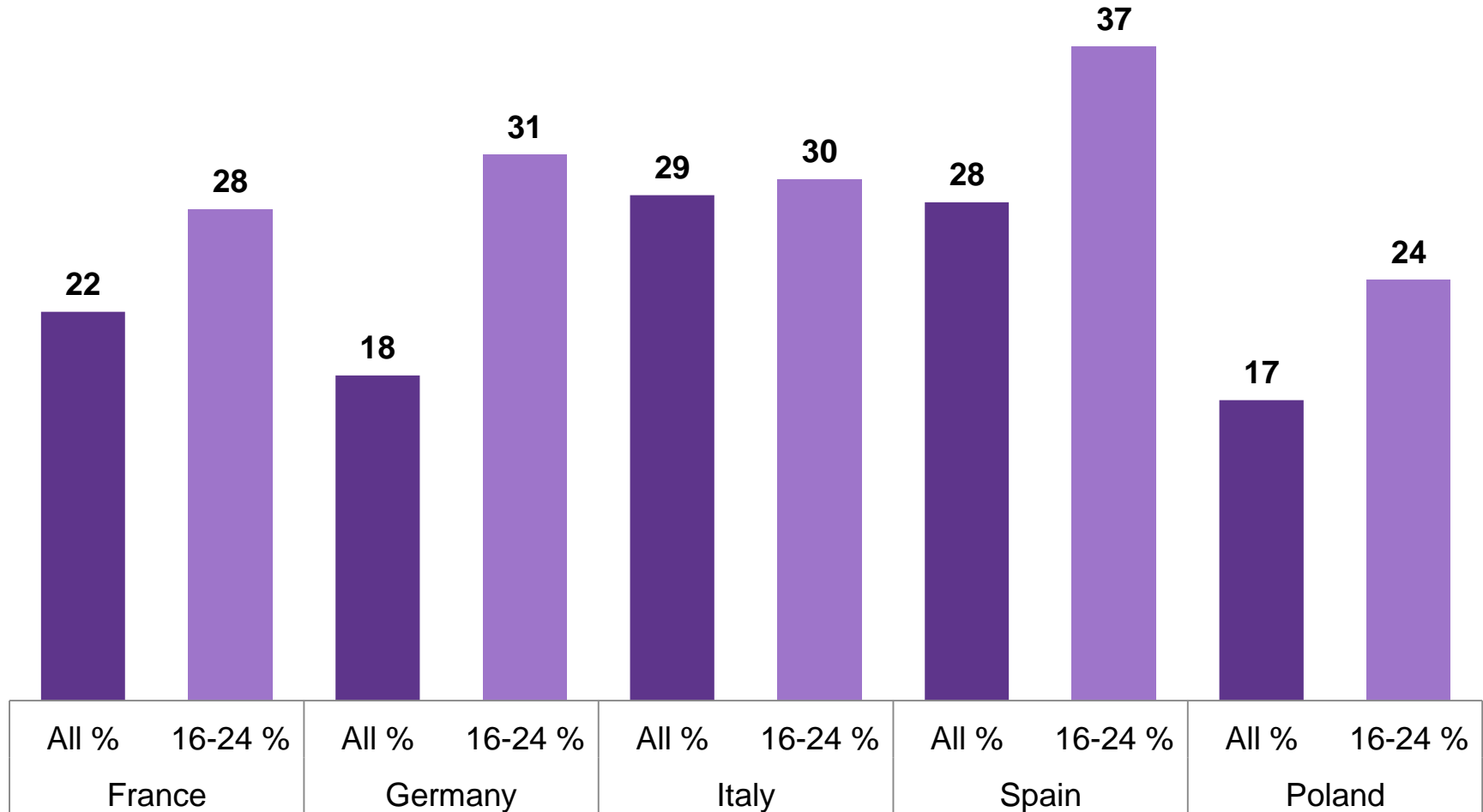
Millennials especially look to veganism, vegetarianism

I am a vegan/vegetarian, Q1-2017



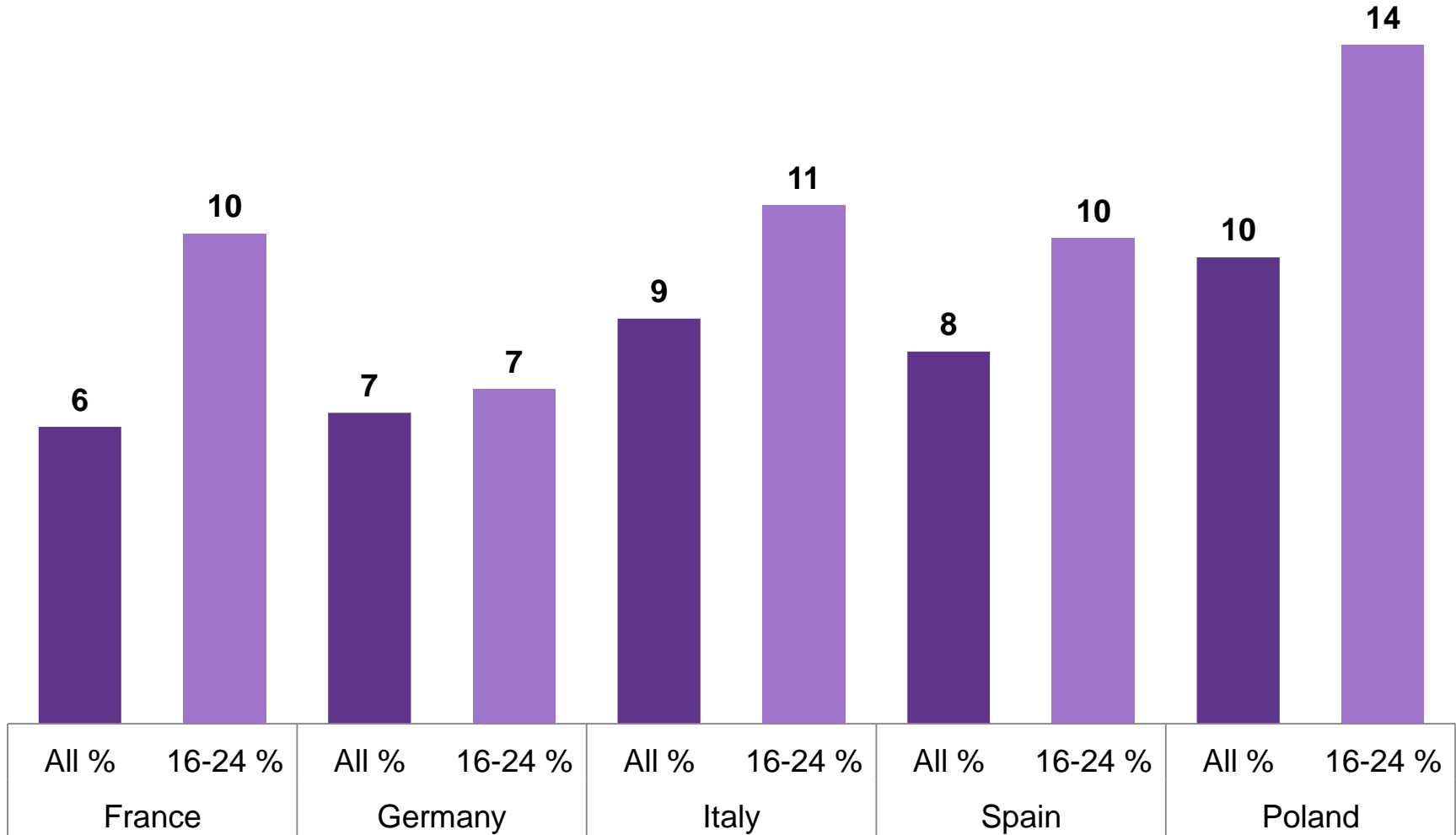
Non-vegetarian Millennials are eating more vegetarian foods

I am incorporating more vegetarian foods into my diet compared to a year ago, Q1-2017



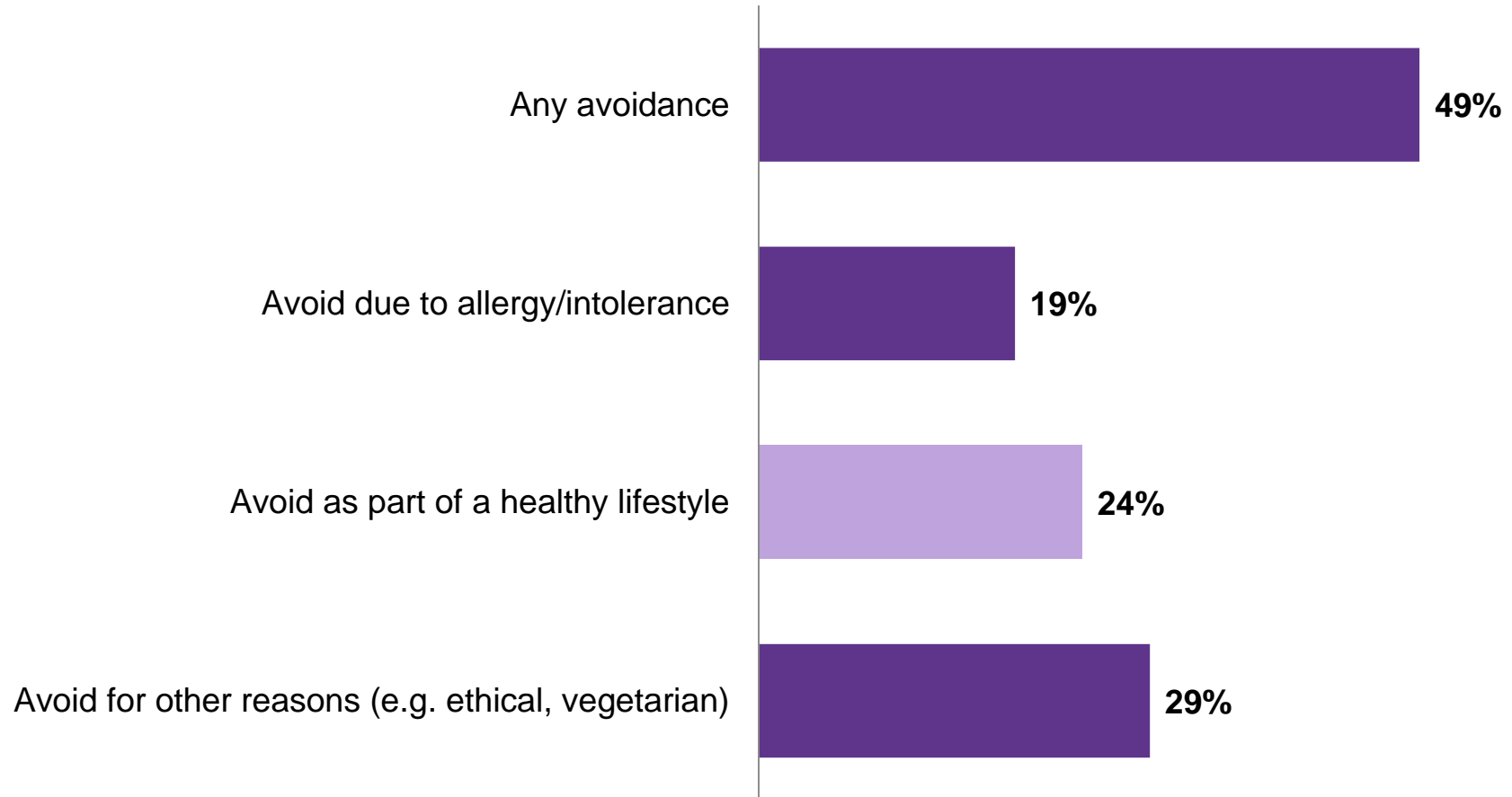
And they're also more likely to follow a gluten-free diet

I am following a gluten-free diet, Q1-2017

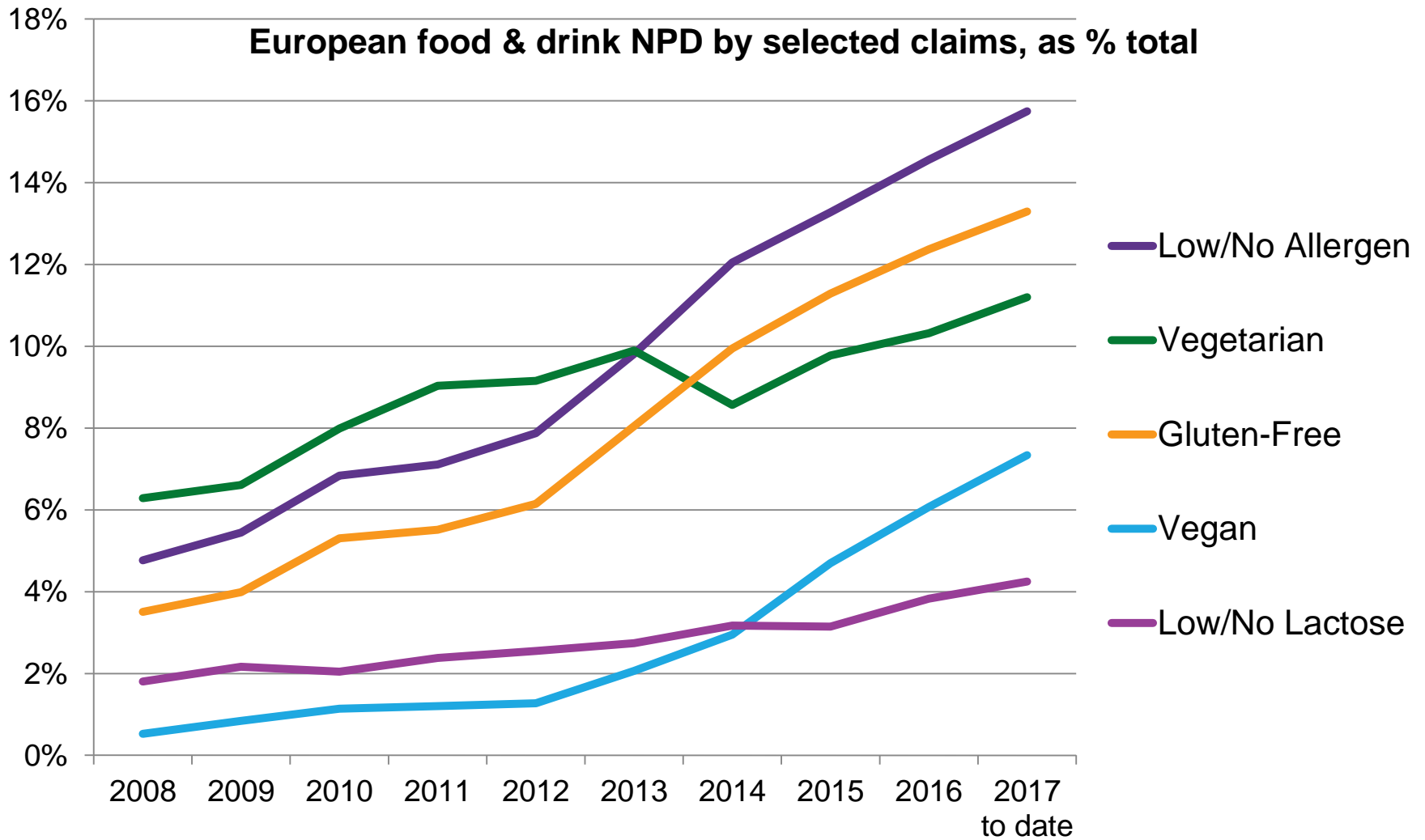


'Healthy lifestyle' is increasingly the key driver

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

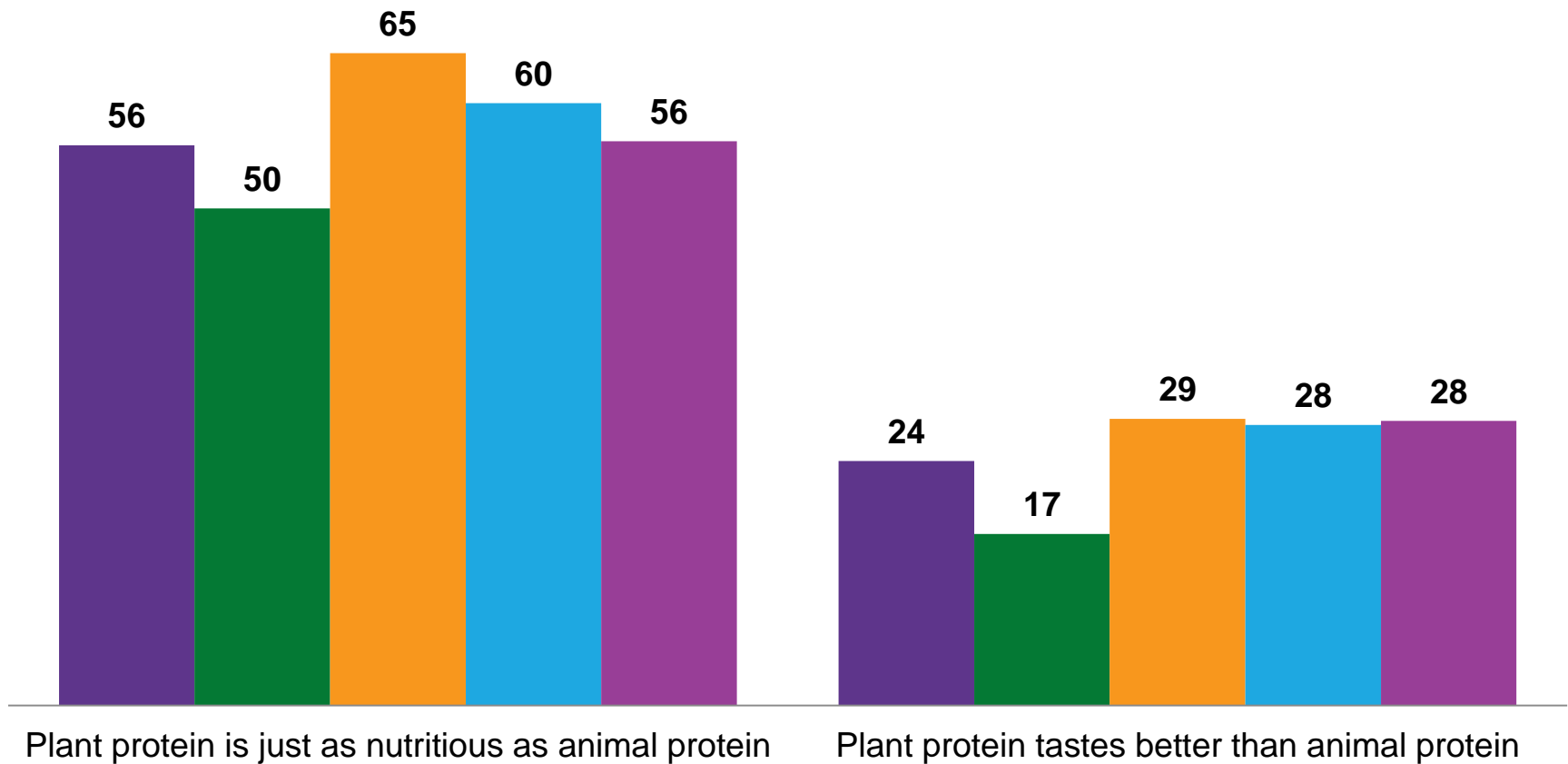


What do consumers look for?
How does industry respond?

Consumers recognise the healthiness of plant proteins, but may doubt the taste...

Attitudes towards plant/animal protein, Q1-2017

■ France - All % ■ Germany - All % ■ Italy - All % ■ Spain - All % ■ Poland - All %



Taste and texture have to become the focus

Meat alternative



Vegaïa Quinoa Vegetable Steak, “delicious, balanced and quick to prepare” (France)

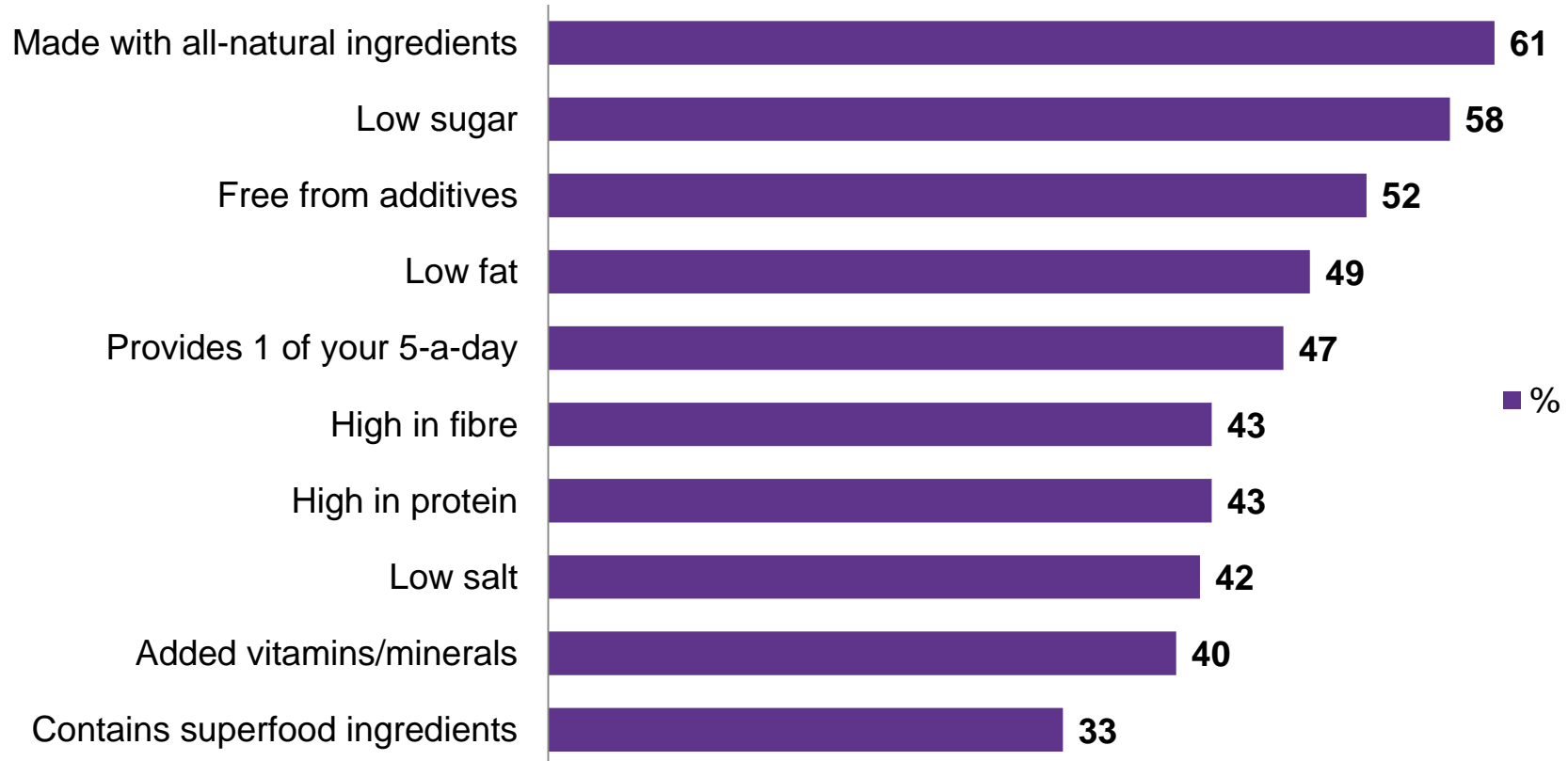
Non-dairy yogurt



Lucy Wagner Foods' Pudology Yogs Coconut Yogurt, “beautifully indulgent and delicious” (UK)

Consumers look for clean label, natural, healthy values

UK, important qualities looked for in new free-from foods, September 2016



Clean label and free-from, two concepts increasingly blurred

100% natural meat alternative



Risenta Hazelnut & Almond Chickpea Patties, 100% natural (Sweden)

100% natural, free-from cookies



Angelic Gluten Free Double Chocolate Cookies, all-natural, free from gluten, wheat, dairy, eggs and nuts, 30% less fat (UK)

What's next?

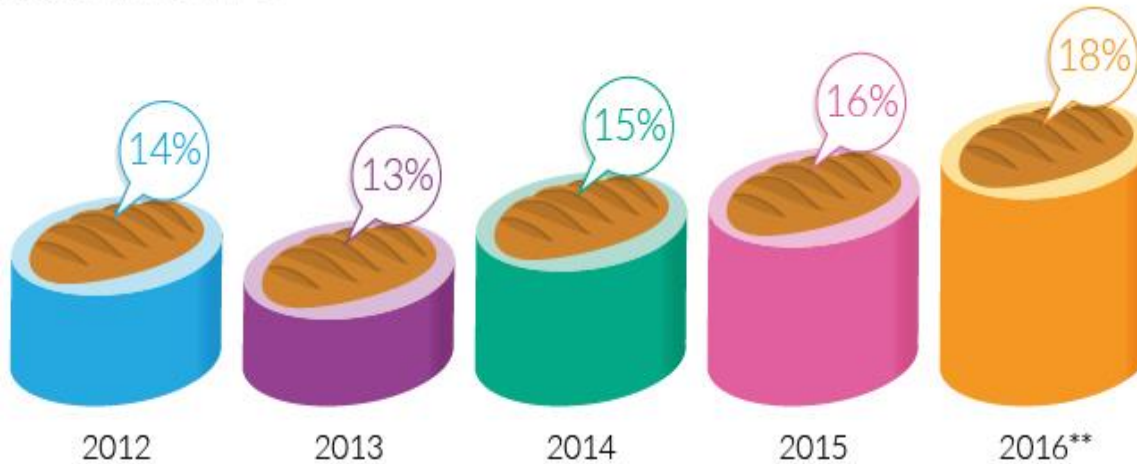
Ancient grains continue to grow and take share

ANCIENT GRAIN* USAGE IN BREAD AND BREAD PRODUCT LAUNCHES, GLOBALLY, 2012-16

*Ancient grain includes grain/seed/flour and all children ingredients of chia, quinoa, teff, emmer, amaranth, einkorn, buckwheat, millet, spelt, sorghum, bulgar and kamut

** January-October

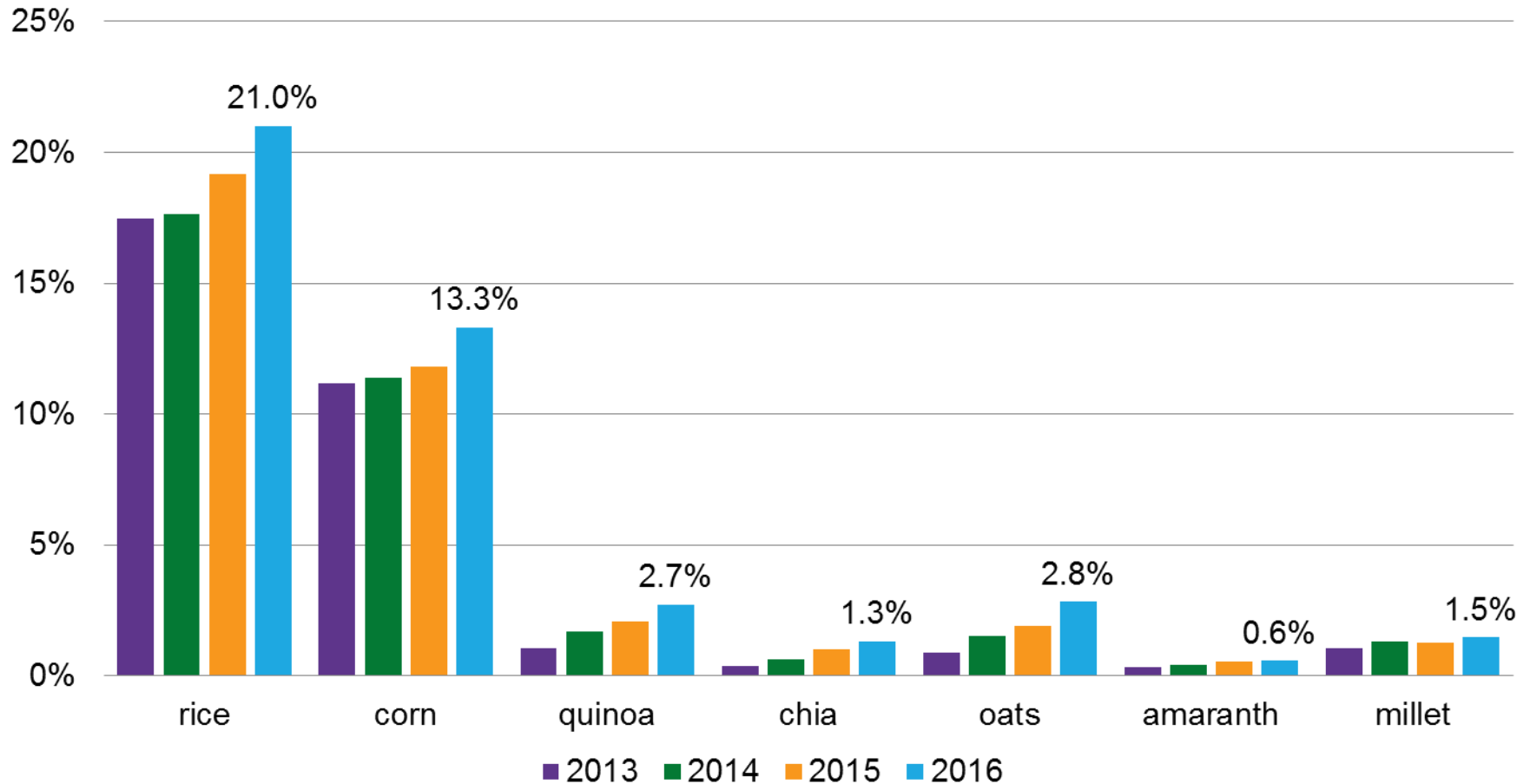
Source: Mintel GNPD



Udi's Gluten Free Soft & Nutritious Millet-Chia Ancient Grain Bread (US)

Wide range of naturally gluten-free alternatives gain traction

% of gluten-free food NPD launched by type of “gluten substitute”, in Europe



Popularisation of heirloom wheats could impact gluten-free

- Heirloom wheats (e.g. einkorn, emmer/farro, kamut/khorasan, spelt) potentially provide non-coeliac gluten avoiders with an alternative to gluten-free foods
- The idea that these pre-industrialisation wheat varieties provide greater nourishment and are more easily digestible than 'modern' wheat has become prevalent
- *'In Tradition We Trust'* – consumers seek comfort in modernised updates of age-old formulations
- But take care! Heirloom wheats contain gluten!

Sliver Hills Sprouted Organic Ancient Grains The Queen's Khorasan (Canada)



Said to have been found in the ancient tombs of Egyptian pharaohs and queens, khorasan wheat forms the foundation of our most majestic ancient grain bread creation. With its sweet, nutty taste and a texture so delightful it will certainly reign supreme in your kingdom

Paleo and 'raw' diets popularise grain alternatives

- Coconut and almond flours increasingly appear as baking ingredients, following the high exposure of grain-free recipes and cookbooks
- Trend slowly spreading to ready-to-eat retail products



Julian Bakery Paleo Wraps (US)

100% paleo and raw product is suitable for vegans, and Jorge Cruise diet approved. It is only made from hand-harvested, unadulterated coconut meat, water, and oil



Hail Merry Bites Caramel Sea Salt Macaroon (US)

Made with organic maple syrup from Vermont, organic virgin coconut oil and sustainable organic coconut sugar



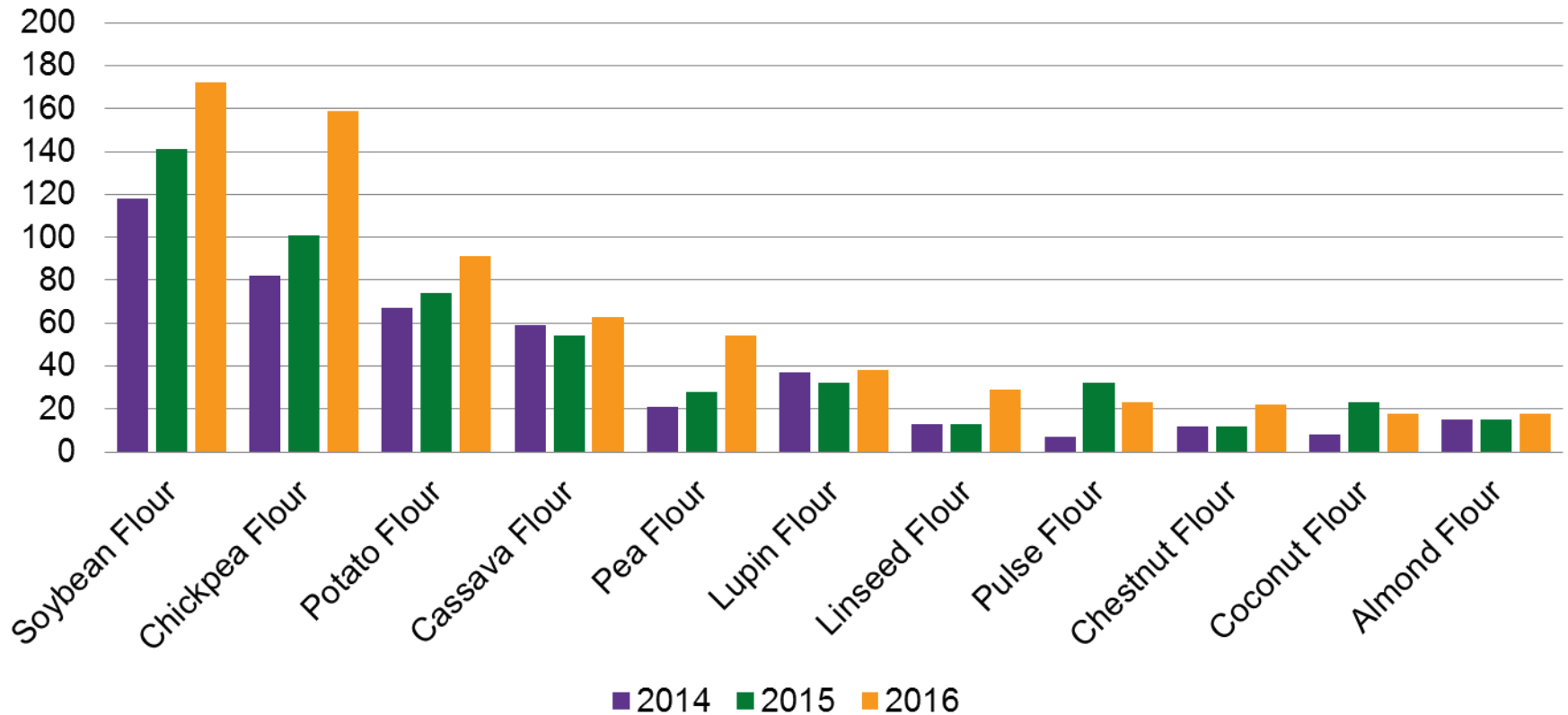
Cravings Gluten Free Sugar Free Bakery Macadamia and Coconut Flour Bagels (South Africa)

Suitable for those on Paleo and Banting diets

Grain-free: The new gluten-free?

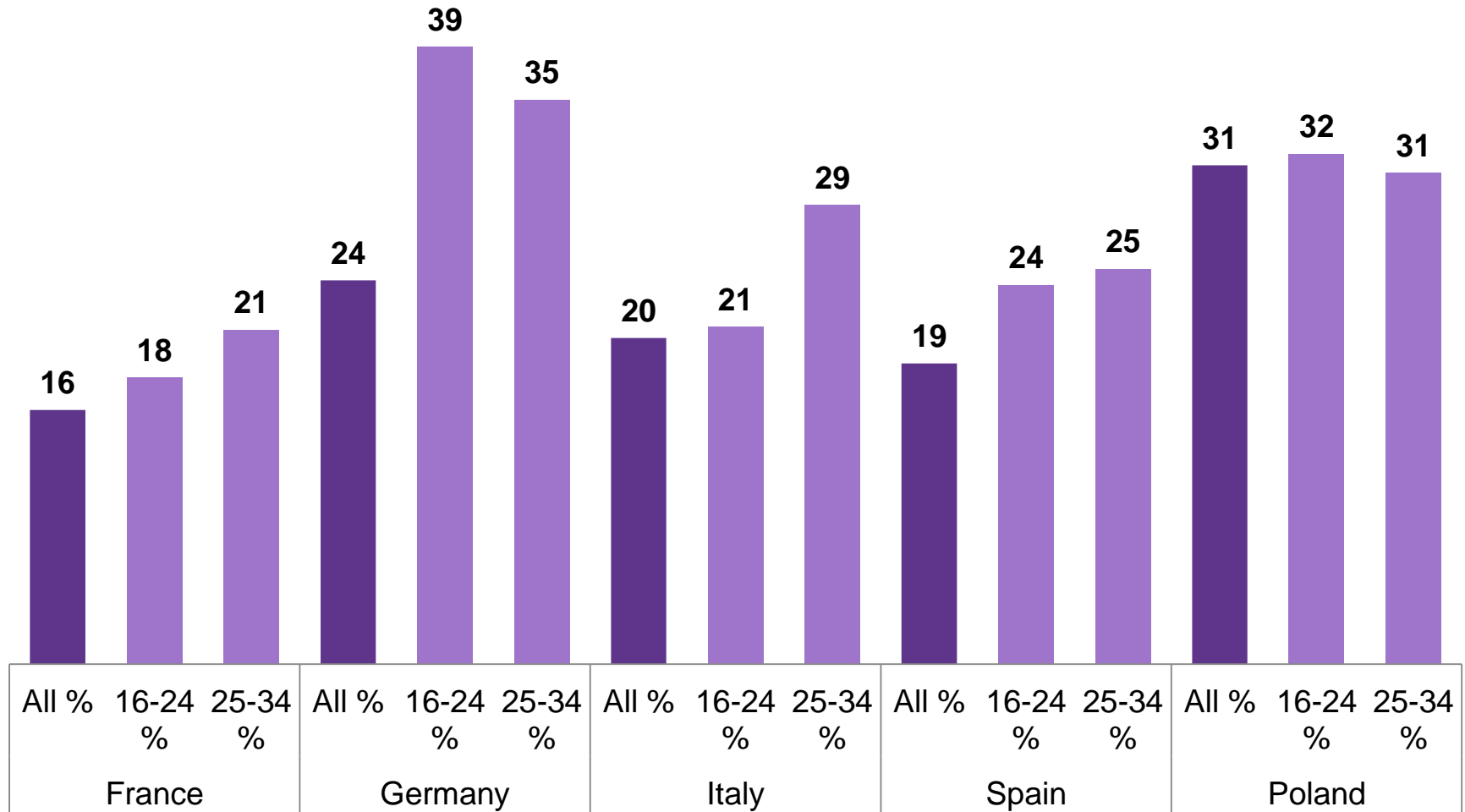
- Nut, fruit and vegetable ingredients are being used. Almond and coconut flours/ingredients are particularly trendy and will likely see more growth

Number of gluten-free food & drink launches by type of non grain flour, Europe



Grain-free bakery attracts (Millennial) consumer interest

Interest in trying grain-free bread/baked goods, 2016



FODMAP diets could also impact gluten-free

FODMAP diets are emerging as an alternative therapy for digestive discomfort.

Gluten may not always be the offending ingredient. FODMAPs (Fermentable Oligosaccharides, Disaccharides, Monosaccharides and Polyols) could be.

In sensitive individuals, these FODMAP molecules are not well tolerated. The FODMAP-friendly logo from Australia provides an example of how products are identifying themselves as low in FODMAPs.

Fodmapped For You! Lamb + Vegetable Soup (Australia)



FODMAP
Friendly

Fazer Stomach-Friendly Rye Bread (Finland)



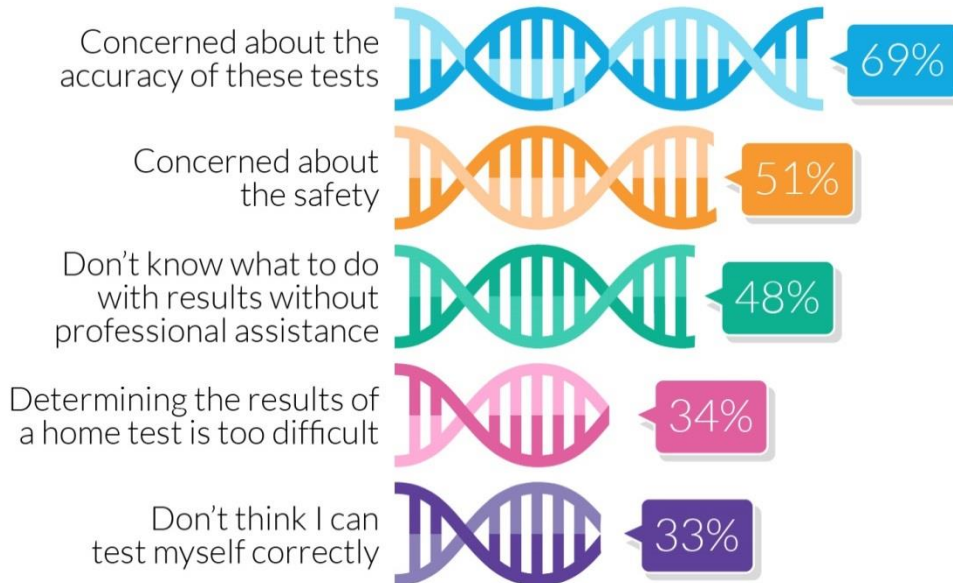
40% reduction in
FODMAP carbohydrates

Personalised Nutrition could revolutionise free from market

More people are recognizing that there might be a diet plan or specific rules that work best for their personal lifestyle, biology or medical history. Advances in technology further these personal quests as wearable fitness devices and high-tech tests collect and analyse body data.

However, the science supporting personalised nutrition and nutritional genomics is still very elementary, and there are obstacles for DNA kits to overcome.

Barriers to using self-diagnostics, US, February 2016



- uBiome is a US biotech company that provides users with information on their microbiomes, particularly gut flora. The *SmartGut* test kit uses advanced DNA sequencing technology to identify key microorganisms in the users gut (both pathogenic and 'friendly').
- uBiome claim that users will be able to monitor their overall gut health, and use the kit to identify common gut symptoms such as abdominal pain and irritable bowel syndrome.

Conclusions and points for the future

A diet revolution

A fundamental shift in consumer behaviour – free-from foods are a choice for the majority

No going back?

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

Winning in the free-from space

In the mainstream, taste and price are always the key factors that determine purchase
Emphasize the goodness (and taste) of ingredients

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