

# 20 TREND INSIGHT 17 REPORT



## CLEAN TRENDS: CHOOSY CONSUMERS CHOOSE TASTE

It's clear: consumers are making the trek towards clean. While they may not completely be on the same page with industry's definition of clean, consumers believe that the foundation of clean involves eating as much real food as possible. With 59% of registered dieticians polled in a 2017 trend survey stating they believe consumers will choose to eat clean, fresh less processed foods and 49% of consumers seeking "mindful eating vs dieting", the slow trek is quickly progressing.<sup>1</sup> Our final foray into the 7 consumer trends for clean casts a spotlight on the importance of strategy, personalization, and most important of all, taste to the discerning, clean-eating consumer.

# 1. SEEK AND AVOID

Going clean is a conscious decision for many consumers, requiring a lot of studying for successful shopping and food prep. But hand-in-hand with clean eating is avoiding highly processed foods that usually contain a long list of ingredients that consumers can't pronounce. For manufacturer's, the challenge is managing product and label reformulations to meet the always changing list of ingredients consumers are eliminating while anticipating what's next. Add to this consumers' confusion surrounding claims, like "natural," or limiting their label reading to the front of the package vs. the back and you have the potential for a lot of misinformation.

## Fast Facts

- **54%** of consumers look for food/beverages with a short list of recognizable ingredients.<sup>2</sup>
- **54%** of consumers select foods based on the ingredient list on the package.<sup>3</sup>
- **46%** of consumers indicated they are trying to get more fiber in their diet, followed by protein (42%), and vitamins/minerals (40%).<sup>4</sup>
- **48%** of consumers indicated they would like to get less pesticides in their diet, followed by HFCS (45%), and Sodium (42%).<sup>5</sup>

## Studying the Label to Eat with a Purpose

When it comes to reading product labels, consumers aren't necessarily studying packages with a magnifying glass but seeking out a few things of value specifically to them. The idea of purposeful eating definitely is giving consumers a sense of control and package labels help them with this practice. 58% of consumers focus on one or two key things, while 70% are attracted to products with the fewest number of ingredients.<sup>6</sup> Claims like "natural" seem to bring the most confusion with consumers all over the board between believing it means free from synthetic ingredients (51%) to contains real ingredients (54%), or is free from preservatives (54%).<sup>7</sup>



---

## THE ELIMINATION GAME

Consumers want to know that the products they are consuming don't contain unwanted ingredients like sugar, gluten or sodium. As such, fifty percent of consumers actively seek foods with low sugar and more than 70% are attracted to the claim of no added sugar.<sup>8</sup>

Not surprisingly, gluten is one of the top ingredients consumers are looking to avoid in their diet and not just for dietary or allergic reasons. While 36% of U.S. consumers are avoiding or limiting gluten, only a little more than 20% do so due to medical reasons, but more than twice as many do so to satisfy health or weight management goals.<sup>9</sup> Interestingly, the claim "gluten-free" is only appealing to 23% of consumers while the claim "good for digestion and gut health" tempts 46% or twice as many consumers.<sup>10</sup> Perhaps, going clean also means the language used in packaging claims needs to be straightforward and provide a clear benefit that consumers appreciate.

### *Seek and You Shall Find Health*

What are consumers looking to add to their diets to improve overall health and wellness? Functional foods and beverages allow consumer to fulfill the eating with purpose objective when stocked with nutritional powerhouses. Here's just two of the many ingredients we're tracking:

**Protein:** Foods like protein aren't showing any sign of waning with consumers as more than 2/3 of consumers are looking to add more protein in their diets.<sup>11</sup> It's plant proteins that are growing in consumer favor as 50% of consumers view them as the best protein source.<sup>12</sup>

**Adaptogens:** Chaga mushroom is just one adaptogen that consumers are craving. Typically soaked for an hour in tea for the immune boosting powers, the chaga mushroom is highly sought after for its functional benefits. Revered as the "King of Medicinal Mushrooms", the chaga mushroom has over 215 different phytonutrient anti-inflammatory and anti-viral effects not to mention its richness in antioxidants and beta-glucans.



## 2. ONE SIZE DOES NOT FIT ALL

There is nothing more personal than choosing what one eats every day. Even colleges and universities across the country have made it easy for students to design a meal in a food court atmosphere as if they were at home (or Chipotle). Face it – consumers want their food to be as customizable as possible no matter the source, especially when they are aligning themselves with a diet principle or plan like Paleo or have specific medical issues such as IBS that require certain diet modifications.

The market is evolving to the point where consumers will demand truer personalization that provides them with control over the production process or creates a product that is truly specific to their unique needs. Here are some unique, fresh innovations where manufacturers are putting the personal stamp on their products.

### *Get to Know Low-FODMAP*

Move over gluten and dairy free...low-FODMAP is the next consumer ingredient discernment. Singling out short chain carbohydrates that cause intestinal distress for consumers including those with IBS, researchers may have found the next layer in the quest for “what not to eat.” The acronym stands for Fermentable, Oligosaccharides, Disaccharides, Monosaccharides or Polyols and expect it to become as familiar as gluten-free. Nestlé is so convinced of the impact of a low-FODMAP diet they created ProNourish, a nutritional RTD that doubles

as a snack. Soon to be available in the grocer, ProNourish is expected to be the first of many low-FODMAP products. And recently spotted at Natural Products Expo West were FODMAPPED For You, a line of sauces and soup stocks and FODY, whose products include sauces, bars and trail mix.

### *A Worthwhile Habit*

Campbell's is the sole investor in the startup company Habit, a personalized nutrition and meal delivery system. Based on assessing a consumer around 60 different biomarkers along with nutritional blood markers, response to a metabolic challenge drink, and personal health goals, Habit prepares a customized meal plan to maximize health, physical and emotional well-being. Habit and Campbell's believe that this new era of personalized nutrition built around science and technology will change the way consumers eat forever.



<https://habit.com/our-meals/>

### ***Print a Pizza***

Startup Beehex originally planned to create a 3D food printer for astronauts in space but quickly realized the potential was a little more earth-shattering. The Chef 3D allows consumers or a restaurant to instantly print up a custom snack or meal via an app that works in sync with medical devices like glucometers and fitness trackers and will launch in 2017 first with pizza. Talk about out of the pizza box thinking.

### ***Tech Takes Out the Guesswork***

Created by a team from Nike, Google, MIT and Stanford, Nima is a portable gluten sensor to help the 20 million Americans who avoid gluten reduce their dinner table anxiety. Consumers take a small sample of the food and insert it into a one-time use capsule that is inserted into the Nima sensor. The sensor reveals within minutes the level of gluten in the food or liquid. The company is also planning to launch a peanut sensor, called Nima Peanut, in the Fall of 2017.

### ***Monogrammed Meal Delivery***

Personalized meal plan subscriptions like PlateJoy offer the best in “custom cooking” and give consumers more control. While there’s nothing hotter than subscription delivery plans that celebrate consumers’ desires to prepare healthy meals themselves, many of the services limit selections to a few, minimizing their appeal. PlateJoy monograms the process by using results from a personalized questionnaire to create tasty dish choices for breakfast, lunch, dinners and even snacks that align with the consumer’s preferences. Taste doesn’t get more personal than that.



---

## 3. TASTE REIGNS SUPREME

Who says people can't change? Because when it comes to the idea of taste, U.S. consumers have certainly evolved. The love for sweet has become mad cravings for sour as evidenced by the acceptance of kombucha and kimchi and at the same time, healthy products are no longer relegated to the odd shelf in the grocery but instead mix in with traditional CPG items challenging them on tastiness. Ultimately, taste is the decision maker for 64% of consumers who indicated it is the most important attribute regarding foods and beverages their household consumes.<sup>13</sup>

### *Taste Trade-offs*

Deciding to “go clean” presents taste challenges for manufacturers regardless of whether they are reformulating or formulating clean from the ground up. Call them taste trade-offs, they include things like flash-point, shelf life, and cost and are especially important to consider. Recognizing the importance of these variables, FONA utilizes its clean continuum process to help customers get to the best solution that checks all the boxes.



## FONA CAN HELP

Do your products stand up to your target consumers' scrutiny? Are you looking to reformulate or develop a clean ingredient statement? We'd love to be the flavor company by your side as you tackle the challenges with going clean. At FONA, we understand how to mesh the complexities of flavor and the challenges of clean with your brand development. We'll consider your technical, regulatory and, most importantly, taste requirements to deliver a complete flavor solution.

We're more than just great flavors – we deliver complete market solutions. Your priorities are our priorities. Your challenges are our challenges. Let's talk.

*Contact our Sales Service Department at 630.578.8600 to request a flavor sample or visit [www.fona.com](http://www.fona.com).*

## SOURCES

1. *Top 10 Superfoods for 2017 from the Pollock Communications and Today's Dietitian What's Trending in Nutrition Survey*
2. *2016 Health & Wellness Trends in America, Natural Marketing Institute (NMI)*
3. *Ibid*
4. *Ibid*
5. *Ibid*
6. *Global Data: Trends in Free From: Consumer Motivations and Innovation.*
7. *Global Data: 2016 Q4 Consumer Survey Data.*
8. *Ibid.*
9. *Ibid.*
10. *Ibid.*
11. <http://www.foodnavigator-usa.com/Markets/From-functional-foods-to-CRISPR-IFIC-forecasts-2017-food-spotlight>
12. <http://www.foodnavigator-usa.com/R-D/Americans-evolve-towards-plant-based-proteins-Packaged-Facts-finds>
13. *2017 Health & Wellness Trends in America, Natural Marketing Institute (NMI)*



1900 Averill Road, Geneva, IL 60134  
630.578.8600 | [www.fona.com](http://www.fona.com)