



# Global trends and insights – Food for Health & Wellbeing

June 5th 2020

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## 1. Food for health: passive and active products

# Active or functional foods

**Active products** naturally contain or have been incremented in any functional ingredient. This means, an ingredient that positively improves a function in our body: “**source of omega-3**”, “**boosts your immune system**”.

**Passive products** highlight a presence, reduction or absence of a component that depends on an individual’s diet and interests: “**no added sugars**”, “**low in fat**”.



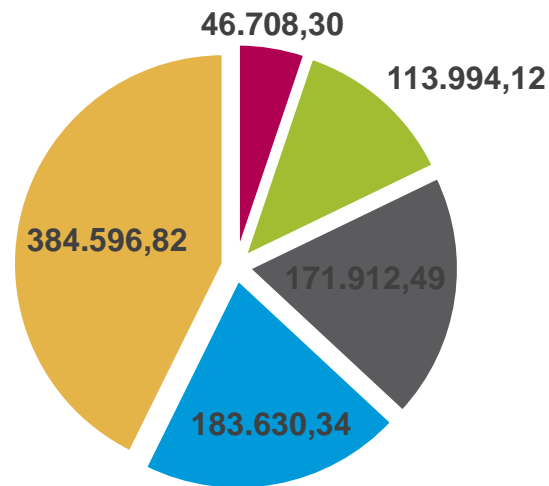
Fermented soy-based beverage, coconut flavor.  
Product registered in Spain, nov. 2019.

Source: Innova Database, Passive & Active Health Products 2020<sup>1</sup>

## Global sales in 2018 – Food & Beverages with health-related benefits for consumers\*

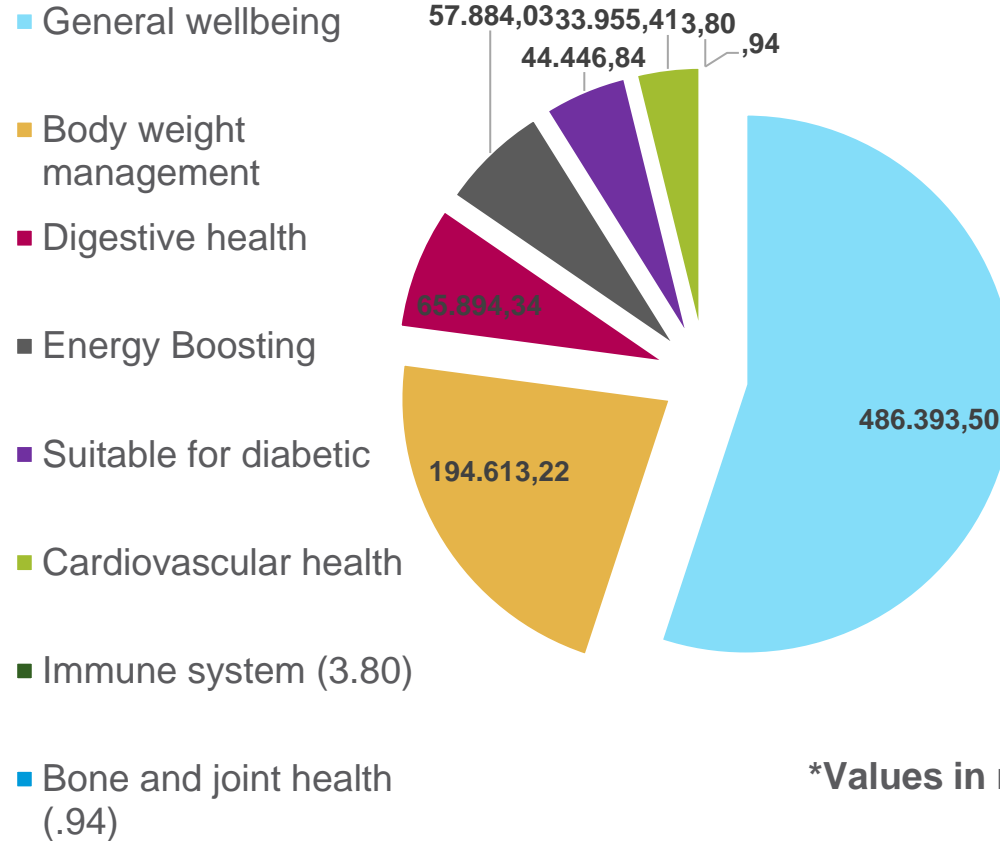
+ 900.482M  
USD

- Intolerance (gluten, lactose, others)
- "Free from"
- "Reduced in"
- Functional and fortified
- Naturally healthy



\*Values in millions of dollars

# Global sales in 2018 – Food & Beverages with health-related benefits for consumers\*



\*Values in millions of dollars

# Health Claims in West Europe and Spain



**Sales in Spain 2018 – F&B with health benefits**

**12.327M USD** in food

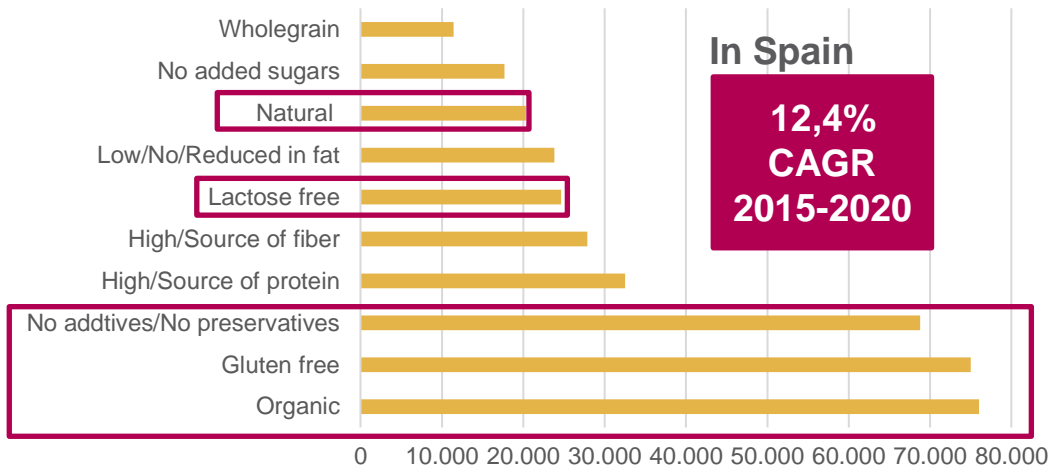
**7.398M USD** in non-alcoholic beverages (2018)

Source: GlobalData 2020



## Passive foods and beverages predominate in West Europe

Health Claims contained in launched products  
West Europe, 2015 - 2020



Source: Innova Database 2020.



## 2. Global trends 2020



# Global Food Trends 2020

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**To tell a story & generate emotions**  


**Plant-based**  


**Yes to sustainability**  


**The right bite**  



**Seeking into high-quality textures**  


**Food looking pretty**  


**hybrids**  


**Increasing familiarity**  


**Macro-nutrients' reformulation**  


**detailed customization**  


clean labels- smart packaging- healthy & tasty



clúster alimentario de galicia

Source: Innova Market Insights 2019, Mintel Tendencial Globales de Consumo 2030

provided to MFC, SADCUS, & CLUS - GA.ORG on 13 Feb 2020 19:13 (UTC)



### 3. Impact of Covid-19

“

*There are two contrary trends happening. During an economic downturn, **consumers become price sensitive and “trade down”** or look for **more value when shopping**. However, during food crisis they become more **quality conscious** and are **willing to pay more** for healthy and nutritious foods.*

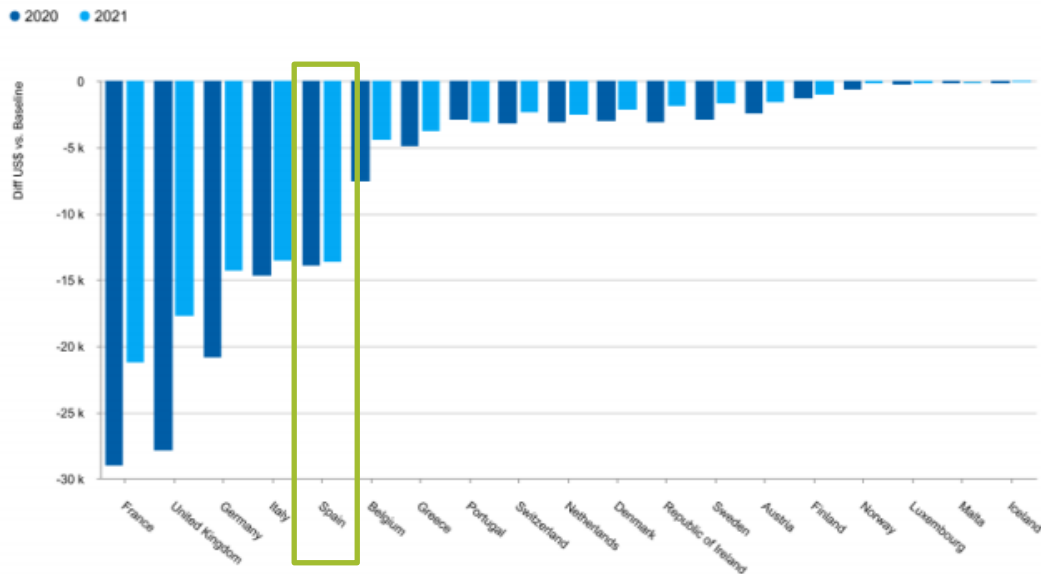
Amarjit Sahota, founder and CEO of Ecovia Intelligence

### 3. Impact of Covid-19 in West Europe

## Western Europe outlook: Region set to decline by US\$141.7bn in 2020

Reduction in total value for 2020 and 2021 vs. baseline

As of 15<sup>th</sup> May, 2020



Source: GlobalData Market Analyzers, COVID-19: COVID-19 Impact Market Model – Consumer Goods accessed on 15<sup>th</sup> May 2020

*Short-term*

- Change of season
- Spent time at home
- Emotional status
- Health Locus of Control Profile
- Halo effect
- Economic situation
- Brand loyalty vs new trials
- What sales reflect



*Long-term*



# Multiple possible scenarios

*High impact of Covid19*



*Z, Millenials*



*X, boomers*



*Low impact of covid19*

# What is expected to be seen?

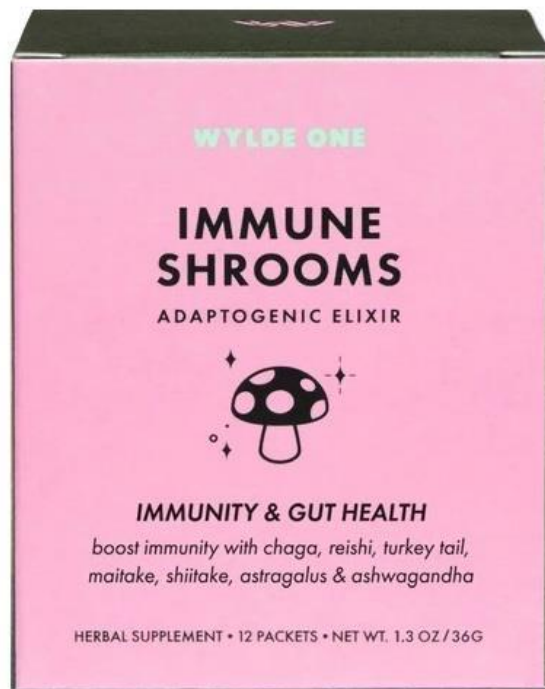
(Regarding trends and health-related food products)



Right now...

# Foods that boost the immune system

Yogurt, vinegar, kimchi, sauerkraut, kombucha & supplements



Supplement in powder (USA)



Drinkable yogurt (Spain)

# Fermented drinks

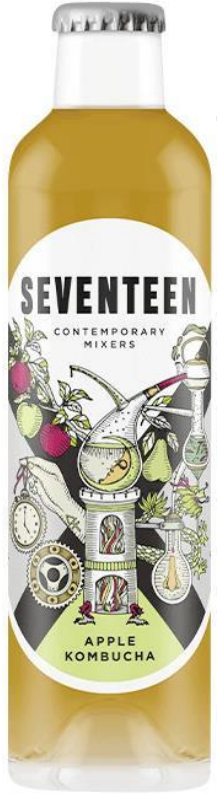
## Tea + probiotics



Hemp Kombucha (Australia).  
Source: Cannabis Place

### Story & Benefits

-  Reduced in sugar
-  Short lists of ingredients
-  Organic



### Consumers want to...

Relieve stress, prevent or even treat a disease, natural sources of anti-inflammatories. Pleasure.

### Formats

Spoonable foods, condiments, snacks.

Kombucha de manzana (España).  
Source: Innova Database

# Balance between wellbeing and pleasure

Covid-19 =  
Premium  
category  
products



## Cold infusions

The botanical concept:  
jasmine, roses,  
hibiscus.

## Less sugar

“Low in sugar”, “zero azúcar”, “no  
added sugars”.

## Flavors: plant- flavored mostly

Combinations of fruits,  
spices, chilis, coffee and  
Brown and seasonal  
flavors.



Cold brew coffee with chicory. (Estados Unidos)  
Source: Innova Database 2020.

Source: Innova Market Insights 2020 20

**In the coming years**

# Naturally sourced ingredients (mostly from plants)

## A continuous search for alternatives



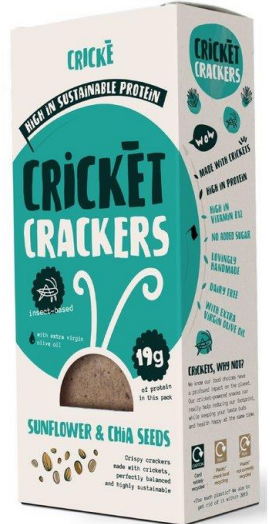
Substitutes for cereals with gluten.



Dairy and meat substitutes. Hybrid products: plants + animals sources.



Seaweed as a snack; as an additive in food, as a material for packaging



Insects: a more sustainable protein source.



Fuentes: Food Navigator, Innova Database, Mintel, The Path Magazine 2020

# The *Plant-based* revolution

From a megatrend to a status

Most preferred claims by consumers

Vegetarian

Vegan

Plant-based

6%

4%

Population in Europe

**+68%  
CAGR**

Compound annual growth rate of products depicting a “plant-based” claim (2014-2018 CAGR)

Protein consumption has increased with Covid-19 crisis

Foodservice & retail thinking of plant-based foods & consumers



# Nutritional information: easy to read and to understand

“I don't have enough time to read labels when I'm doing groceries, even if I wanted to”

**28%**

of global consumers

Source: GlobalData 2020



**Descripción:** Fermentado de soya estilo Skyr.

Perfecto para empezar el día, con **proteína extra**, 100% vegetal y totalmente delicioso. Disfruta una densa y deliciosa **textura** en cualquier momento del día.

**Ingredientes:** base de soya (agua, soya desvainada (15.7%), azúcar, estabilizante (pectina), citrato tricálcico, correctores de acidez (citrato de sodio, ácido cítrico), sabor natural, sal marina, antioxidantes (extracto rico en tocoferoles, ésteres de ácidos grasos de ácido ascórbico), vitaminas (B12, D2), fermentos (*S. Thermophilus*, *L. Bulgaricus*).

**Etiqueta:** Alto en **proteína**. Bajo en **azúcares**. Naturalmente **libre de lactosa**. 100% de **origen vegetal**. Apto para vegetarianos. Naturalmente **bajo en grasa saturada**. Rico en **fibra**. Fuente de **proteína**. Fuente de **calcio**. Contiene vitaminas B2, B12 y D. La vitamina B12 contribuye a la reducción del cansancio y la fatiga. Nutri-Score: A.

Produced in Spain.

Source: Innova Database 2020.



# New trials with “ancient diets” and food culture beard in mind

Herbal and fruit extracts, essential oils y oleoresins.

*Cider vinegar, 100% Galician apples produced by 150 Galician farmers. 5% acidity, gluten free, unfiltered.*



# “Your purchase benefits you and benefits the environment”

Health and Sustainability



“Love yourself” + “low in sugars” claim

Source: Innova Database, products registered in Spain, 2020.

# Ingredients: towards familiarity

Probiotics, Prebiotics y Cannabidiols (CBD)



Flavored porridges with probiotics (UK)



Sparkling drink with prebiotics  
100% plant-based, no added sugars (Australia)



Relieves pain,  
induces  
relaxation,  
reduces anxiety  
and stress.



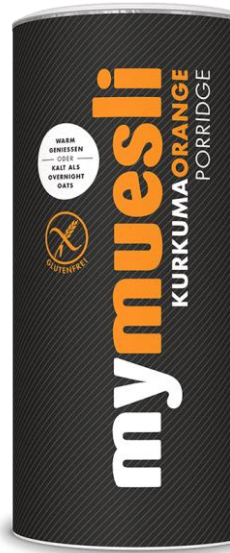
Cacao and coconut bar with natural  
nootropics (UK)

# Megatrends impacting lifestyles

Time planning: quick  
F&B, on-the-go



Dairy drink with caffeine and  
probiotics (USA)



Ready-to-eat oats  
with turmeric and  
orange  
(Amazon)



Double benefit: easy to  
prepare and homy  
sensation



Chicken Tikka Masala - tandoori  
style, tomato and fenougreek  
creamy sauce and Pilaf rice (UK)

Source: Innova Market Insights 2020, Tesco, Oikos Profuel, Amazon, Häagen-Dazs

Comforting and pleasant  
flavors



Caramel & Chail Latte ice cream

# Thank you

We remain attentive to your comments,  
questions and suggestions

[www.clusteralimentariodegalicia.com](http://www.clusteralimentariodegalicia.com)

- [info@clusaga.org](mailto:info@clusaga.org)
- [mercados@clusaga.org](mailto:mercados@clusaga.org)

