



KITCHEN MEDICINE: A *Global Look at Medicinal and Functional Foods & Beverages*

2020 Global Topic Report – Detailed Outline

We are seeing a global resurgence of the more traditional and holistic approach to health and wellness. Consumers are expressing a strong belief in the healing power of foods and many are actively using *kitchen medicine*, both for prevention and for specific medical purposes. This report takes a deeper look at the topics of food as medicine and functional foods and beverages (globally, regionally, and across 22 individual countries) to help companies better understand shopper motivations and attitudes and allow them to connect more powerfully with their targets and bring market solutions faster and more profitably.

MARKETS:

The following regions and countries are covered within the report:

- NORTH AMERICA: USA and Canada
- LATIN AMERICA: Brazil and Mexico
- EUROPE: France, Germany, UK, Spain, and Russia
- MIDDLE EAST & AFRICA: Saudi Arabia, Turkey, and Nigeria
- SOUTH ASIA: India and Pakistan
- EAST ASIA PACIFIC: Australia, China, Indonesia, Japan, Philippines, S. Korea, Thailand, and Vietnam

TOPICS COVERED:

- Target Profile: *Kitchen Medicine Consumers*
 - Explores a segment of shoppers, called the “Kitchen Medicine Consumers”, to better understand their unique attitudes and needs. The group is profiled globally and sized within each region and country.
- Food as Medicine
 - Actions shoppers are taking and how these vary demographically and by market. Are consumers actively choosing foods/beverages that provide protective, preventative health benefits? Are they choosing foods/beverages for specific medical purposes?
 - Belief in using food as medicine. Do shoppers believe foods/beverages can be used to reduce their use of some drugs and other medical therapy? Do they

think certain foods/beverages/ingredients have medicinal benefits? How has their belief in foods/beverages/ingredients having medicinal benefits changed in the past 2 years?

- Shoppers' attitudes on diet vs. pharmaceutical drugs in contributing to overall health, both in importance and effectiveness.
- Functional Food & the Benefits Shoppers Seek
 - Level of interest in functional foods/beverages (i.e., provides a health benefit beyond nutrition) and how interest varies demographically and around the world.
 - Are shoppers willing to pay a premium for functional foods/beverages?
 - Identifying the specific functional benefits shoppers are looking for. This report covers 26 benefits shoppers actively seek from foods/beverages, including stress reduction, mental performance, immunity, digestion, energy, weight, heart health, mood, satiety, sleep, athletic performance, etc.
 - The HealthFocus International Benefit Platforms
- Instant Nutrition: Drinkable Health & Fortification
 - Do they believe that beverages can provide the same nutrition as foods? What are the benefits they want from drinkable products (e.g., health benefits, added vitamins and nutrients, weight management, sustained energy, burst of energy, convenience, meal replacement, etc.)?
 - The importance of fortification and how attitudes vary around the world. How have shoppers changed their usage of fortified foods over the past two years? How accepting are they of scientific and technical improvements to foods and beverages if they provide benefits they want?
- Functional Ingredients
 - 20+ ingredients plotted on the HealthFocus International Ingredient Strategic Opportunity Quadrant.
 - Level of consumer interest in:
 - Active cultures
 - Algae
 - Ancient grains
 - Antioxidants
 - Ayurvedic ingredients
 - Bone broth
 - CBD
 - Coconut oil
 - Collagen
 - Fiber
 - Hemp
 - MCT oil
 - Mushrooms
 - Omega-3 fatty acids (from fish, flax seed)

- Plant protein
- Prebiotics
- Probiotics
- Protein
- Seaweed
- Slow-release carbohydrates
- Sprouts
- Turmeric
- Whole grains