

## 2015 Emerging Ingredient Study Report Outline

### ➤ Background:

*Emerging Ingredients for Health*—a study of 1,000 consumers explores the opportunity for using cutting-edge ingredients to provide brand advantage and direction for portfolio development. This study evaluates the current awareness and the associated benefits of 50 ingredients—from herbs, spices, grains, flours, seeds, superfoods, and other unique ingredients—that may be gaining interest to help companies understand where consumers stand related to a number of emerging ingredients.

### ➤ Study Objectives:

Provide direction for portfolio development by helping companies to understand where consumers stand related to emerging ingredients. The primary objectives are to:

- Explore 50 emerging ingredients to determine the level of awareness and reveal the specific benefits that consumers associate with each ingredient.
- Better understand what consumers are looking for in foods/beverages, see how open they are to trying new ingredients, and discover how important unique ingredients and ingredients that provide health benefits are to consumers.
- Uncover the target markets for new, unique ingredients—which consumers are seeking out unique ingredients and will they pay a premium for them?

### ➤ Ingredients Explored Within the Study:

- **Herbs & Spices:**
  - Maca
  - Cinnamon
  - Turmeric/Curcumin
  - Fennel
- **Superfoods:**
  - Acai
  - Bee pollen
  - Cacao
  - Goji berries
  - Camu Camu
  - Kale
  - Moringa
  - Spirulina
  - Wheatgrass
  - Coconut oil
- **Grains:**

- Amaranth
- Barley
- Quinoa
- Spelt
- Sprouted grains
- Farro
- Millet
- Freekeh
- Buckwheat
- Black/forbidden rice
- **Seeds:**
  - Chia seeds
  - Flaxseed
  - Hemp seeds
- **Flours:**
  - Almond flour
  - Banana flour
  - Coconut flour
  - Rice flour
  - Oat flour
  - Ancient grain flour (e.g., spelt, quinoa)
  - Whole-wheat flour
  - Legume flour
  - Cricket flour
- **Protein:**
  - Pea protein
  - Rice protein
  - Soy protein
  - Whey protein
- **Natural Sweeteners:**
  - Coconut palm sugar
  - Agave
  - Cane sugar
  - Monk fruit
- **Natural Energy:**
  - Guarana
  - Yerba mate
  - Matcha green tea
- **Miscellaneous:**
  - Fermented foods/beverages (e.g., kimchi, sauerkraut)
  - Botanicals (e.g., elderflower, hibiscus, lotus flower)

- Seaweed & algae-based food ingredients

➤ Detailed Overview:

○ **What are Consumers Looking for?**

- How often do shoppers read labels on food packages?
- What are they looking for on labels (e.g., ingredients they want to avoid, benefits the product offers, ingredients they want more of, unique ingredients, etc.?)
- Are they willing to pay a premium for unique ingredients?
- In which categories would shoppers like to see unique ingredient substitutions?
  - Herbs and spices (e.g., replacing traditional herbs and spices with those known for health benefits such as turmeric)
  - Natural sweeteners (e.g., replacing white sugar with coconut palm sugar or agave)
  - Grains (e.g., replacing traditional grains like rice with ancient grains like quinoa or barley)
  - Flour (e.g., replacing white flour with almond or banana flour)
  - Vegetables (e.g., replacing lettuce with kale or carrots with yellow beets)
  - Seeds (e.g., replacing poppy seeds with chia or hemp seeds)
  - Fruit (e.g., replacing apples or bananas with goji berries or mangosteen)
  - Caffeine (e.g., replacing traditional energy sources like caffeine with natural energy sources like guarana)
  - Protein (e.g., replacing meat or dairy protein sources with plant-based protein sources like pea protein)
  - Legumes (e.g., replacing red or black beans with mung beans or lentils)
- Do they believe that many spices have inherent health benefits?
- Interest in natural sweeteners
  - Do they prefer products that are naturally sweetened?
  - Are they concerned about some types of sweetener alternatives because of unknown chemicals?
  - Are they interested in sweetener alternatives? If so, what do they believe is necessary in sweetener alternatives (e.g., must be natural, must taste as good as sugar, must be from a plant or recognizable source, must be close to the same price as what is currently used in product, must be a good source of energy, must be suitable for people with diabetes, etc.?)
- Are they looking for healthier energy sources than caffeine?
- Do they prefer fruits and vegetables with high antioxidant content?

○ **Opportunity for Using New Ingredients:**

- Are they very open to trying new foods and beverages?
- Do they consider themselves very forward thinking when it comes to nutrition and like to be first in trying new foods and healthy ingredients?
- Understanding beneficial ingredients:
  - I would be interested in trying new ingredients (e.g., moringa, bee pollen, flaxseed) even if I wasn't sure of the exact benefits.

- I don't have to know the details about specific beneficial ingredients to try a product once I've heard or read that the product is good for me.
- When I see a new ingredient in a product that I'm not familiar with I usually assume that it's safe to try.
- Which factors are key in trying new ingredients (e.g., taste, health benefit claims, natural, nutrition, ingredient origin, sustainability and environmental impact, whether they have heard or read about the ingredient, if it sounds interesting, if a friend recommended it, etc.?)
- What do they usually do when seeing an interesting, new ingredient on a label claiming a benefit (e.g., research it before trying, just try it to see how they like it and if it has any effect, wait for someone they know to try it and tell them about it, it doesn't affect them one way or the other, etc.?)
- Benefits from supplements vs. food:
  - Do they believe it's better to get benefits from natural whole foods than from supplements?
  - Do they believe it's easier to get benefits from supplements than from foods?
- Making products seem healthier:
  - Do they think all foods/beverage categories including things like soft drinks, candy and snacks should be made as healthy as possible? Does taste play a role in this?
  - If they are going to eat things that aren't that healthy like baked goods or candy, do they feel a lot better about them if they are made with healthier ingredients such as coconut flour, almond flour or antioxidants?
  - Do they not worry as much about calories or sugar in things that are good for them like juice or yogurt?
  - Do they think that having unique, healthy ingredients (e.g., bee pollen, wheatgrass, etc.) in something such as a smoothie or a juice makes it worthwhile and healthy even if the sugar or calories may be higher than they would like?
- Diets -- Do they look for new ingredients to get them closer to a gluten-free, higher protein, or meatless diet?
- Do they mind trying alternative proteins from sources like crickets?
- **Ingredient Awareness and Associated Benefits:**
  - How aware are they of the 50 ingredients (e.g., Heard of it and understand its potential benefits, Heard of it, Never heard of it but interested to learn more, or Never heard of it?)
  - Which health benefits are shoppers most interested in getting from foods/beverages?
  - Which benefits are associated with each of the 50 ingredients?
    - Helps boost metabolism
    - Helps build resistance to common diseases like colds and flu
    - Helps improve mental energy or concentration
    - Helps improve mood
    - Helps improve physical energy
    - Helps improve sports or workout performance

- Helps keep you feeling full longer so you don't get hungry
  - Helps lower cholesterol
  - Helps maintain a youthful appearance
  - Helps maintain good eyesight
  - Helps maintain heart health or blood pressure
  - Helps maintain muscle strength
  - Helps manage blood sugar levels
  - Helps reduce inflammation
  - Helps reduce risk of diabetes
  - Helps retain mental sharpness as you age
  - Helps to manage weight
  - Promotes good digestive health
  - Promotes healthier skin
  - Promotes stronger bones
  - Removing toxins from the body/detoxifies
  - Replaces a less healthy ingredient with something better
  - Just generally healthy. No specific benefit.
  - None of these
- **Targeting New Ingredients:**
    - Respondents are asked to classify their overall outlook on their diet as a way for us to understand key motivations and how many are motivated by certain things like money or illness or trying something new, and how many are truly consistently nutritionally diligent. Two of these groups—The Nutritionally Diligent and the Nutritional Foodies—were identified as potential key targets for unique foods and ingredients and these groups were further explored within the study.

➤ **Methodology:**

- Methodology:
  - Online study of 1,009 respondents between the ages of 18-70 in the US.