



Wellness by Univar Solutions





Food trends, established, evolving & emerging, are driven by two key factors – The market & social influence. Understanding these factors is crucial to determine the difference between a trend and a fad.



There is no doubt that one of the biggest drivers of social change has been the rise of technology. Now, more than ever, consumers hold a wealth of information at their fingertips, unlocking the door to a global plethora of ideas, discoveries & cultures, giving rise to what we now call 'The Conscious Consumer'. This consumer craves instant gratification and is far more aware & informed with regards to food and its origins. Issues that were once dismissed, such as health, welfare & sustainability are now front of mind when making purchasing decisions, leading to products that display these characteristics to become the norm rather than niche.

Further pushing the modern consumer is the entrenched utilisation of social media and the birth of the 'Instagram Generation'. Globally, 45% of people share photos or videos weekly, up from 38% in 2015. With our lives on display, it has created a society where purchasing decisions are influenced by the status and shareability a product offers.

The modern consumer is mindful, knowledgeable and health conscious, not to mention influential. They are driving NPD where value rather than cost is deemed most important. This in-demand value lies in products that align with the trends as well as offering variety, novelty & sustainability, satisfying social desires.

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Largely driven by government messages and key influencers, Health & Nutrition has been one of the strongest trend drivers in recent years. The evolution of this trend is where 'Wellness' comes from.

With so much information on 'Health & Nutrition' it becomes difficult to truly define what 'Wellness' is. Conflicting opinions and multiple 'fad' diets have led to scepticism in 'Wellness' and caused consumers to ask 'what's good for me?' before reaching their own conclusions.

Known as 'Tailored Health' whereby people can edit their routine to suit what is best for them right now, whether this is to lose weight, reduce stress, live longer, aid sleep or boost energy levels – there's an ingredient for that! More so, consumers are continuing to lean towards fulfilling nutritional needs via foodstuffs as opposed to vitamins and supplements.

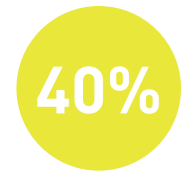
Studies have shown that positive 'high in' health claims are better perceived than 'less' or 'reduced' ones, but there are solutions to innovate and use both. Either way, it is crucial that a variety of options are made available and even more important that they taste & feel great too! The challenge for products lies in attracting growing, yet tighter target markets whilst focusing on making more health products accessible to all. The key is in clear, specific messaging around each particular benefit.



Global product launches between 2016 and 2017 saw a 76% rise in Keto claims, 36% rise in 'Feel Good' claims and a 32% rise in Paleo



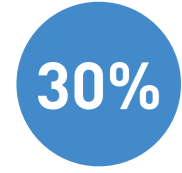
Consumers from the UK, France, Germany, Spain & Italy are drinking less soft drinks due to health concerns



Globally, consumers expect to pay more for a healthier/functional snack



UK consumers said they thought messages about diet and health were confusing



Consumers from the UK, France, Germany, Spain & Italy believe healthier drinks means a poorer taste



UK consumers interested in a personalised diet based on Genes & DNA

2/3's
of Brits follow some sort of diet with 3/4's of those opting for a more common-sense approach based upon increased knowledge.

The UK have set targets to cut childhood obesity by 20% by 2024

Nutrition Plus

An interesting angle on the 'Wellness' trend is 'Nutrition Plus' whereby functional ingredients containing various nutritional benefits are added into traditional favourites that move beyond typical sports & nutrition fare. The challenge remains that 'fortified' products can be perceived as synthetic or 'over-processed', so it is important to utilise ingredients that can keep a clean label.

Protein

Protein enrichment has been an established trend for some time now, however, the protein market is changing. More consumers are looking for a whole lifestyle approach to nutrition, seeking protein sources in everyday fare beyond traditional shakes & bars, whilst the trend towards plant-based eating has seen interest in plant proteins grow significantly too. Traditionally difficult to live up to its animal-based counterpart, we have a wide range of protein solutions that can deliver a consumers' unwavering desire for taste & texture.

Featured Suppliers



Trusted globally, NZMP dairy ingredients are sold in more than 130 countries worldwide and provide advanced, highly functional and stable proteins that can overcome production limitations, resulting in protein fortification of all kinds of nutritional products, without compromising on texture or flavour. Through our combined technical expertise, we can help you build protein-rich concepts that break the mould.



The innovative and inspiring enzyme portfolio from Novozymes contains an extensive range of cutting-edge enzymes and related technologies to serve manufacturers. They can be used to enhance flavour but also function with increased yields, solubility, economy & flexibility in both plant & dairy proteins.



AGT's flour, fibre & protein (concentrate & isolate) ingredients are produced from pulses, such as peas, faba beans, lentils & chickpeas. The range offers a selection of plant-based ingredients, suitable not just for vegan and vegetarian applications, but also gluten-free and low/no allergen as well as for fortification or technical improvement of existing formulations. Different grades offer varying functionalities depending on the requirements of the end product, including viscosity modification, water binding and emulsion stability.



For consumers seeking a plant protein source, ProDiem™ benefits from Kerry's unique processing & formulation expertise to deliver a solution with a complete essential amino acid profile while significantly reducing off-notes, astringency & grainy textures in nutritional, vegan-friendly, bars & beverages.

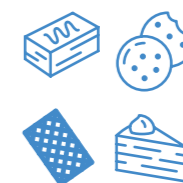


Products with high/added protein claim increased **229% IN THE LAST 5 YEARS** and make up 3.6% of total food & drink launches in EMEA

63% of adults believe that protein helps them feel **fuller** for longer.

Dairy protein still remains **THE NUMBER ONE PROTEIN SOURCE** **Nº1**

AVERAGE PROTEIN content has increased by **1g** per 100g since 2014



In 2018, 8.2% of all **SPORTS PROTEIN BAR** formats were less *traditional items* such as, **cookies brownies wafers cakes flapjacks**

THE USE OF **PLANT PROTEINS** in food & beverage launches has **grown 16% globally year on year**





Fibre

With fibre ranked by consumers in the top 5 for perceived health benefits and 'Gut Health' considered a key consumer trend, it is no surprise to see annual growth in both fibre consumption and new product launches carrying a fibre claim. As a good source of fibre, Mintel have highlighted prebiotics as an ingredient to watch in 2019 and urge producers to "build a connection in consumers' minds between certain fibres and their ability to act as food for the microbiota".

Featured Suppliers



A leading global ingredient solutions provider, Ingredion is widely recognised as the expert in clean label starches and flours. Ingredion also supplies a range of fibre ingredients that can be used across multiple applications. Known as resistant starch, HI-MAIZE® is a dietary fibre that allows for the partial replacement of flour without affecting product appearance and taste. Gluten-free, it can permit 'fibre' claims and studies show that it can also result in a 'reduced glycaemic response'. Also part of Ingredion's portfolio is BIOLIGO® GL 5700 IMF GOS syrup, which can be used across multiple applications.



Sports Nutrition is the fastest growing category for fibre. NZMP Galacto-oligosaccharide (GOS) is a prebiotic dairy fibre that can help to prevent bloating compared to other fibre sources. Fibre also impacts regularity and increases the feel of satiety. GOS contains Mono- & di-saccharides which are great for after sports recovery to restore glucose levels. GOS can act as a binding agent, increasing texture in applications e.g. bars & bakery.



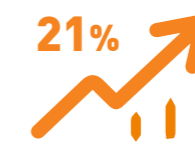
AGT offer a soluble inner pea fibre and will soon launch an outer pea fibre too. The inner pea fibre acts as a water binding agent with no taste impact, reported as performing better than hydrocolloids in a number of applications it has been trialled in. It permits a clean label declaration as "pea fibre" and noteworthy are its gluten-free & non-GMO status, allowing for it to be used for fibre enrichment across a host of high moisture product applications.



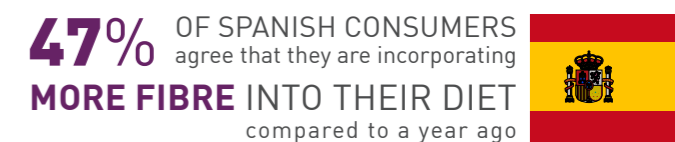
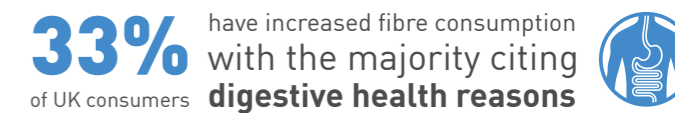
IMAG's organically certified agave inulin is highly soluble, with a neutral flavour and a variety of associated sustainability initiatives. It can be used to create functional foods with its dietary fibre and prebiotic qualities. It allows for natural improvement of moistness and mouthfeel, making it a useful tool for fat reduction as well as providing the potential for claims surrounding digestive health.



Actilight® is a Fructo-oligosaccharide (FOS), available in a syrup or powder form. It is a soluble, prebiotic fibre concentrate that lends sweetness and binding properties to applications, whilst reducing sugar - generating a low glycaemic response and contributing to 'high in fibre' packaging claims. In addition, it contributes to a healthy balance of gut microbiota when ingested.



annual growth in new product launches carrying **A FIBRE CLAIM**



Minerals

It is possible to get all the nutrients we need from a varied and nutritious diet, however, whether through circumstance or choice, not everyone will follow one. Fortification with minerals can add back in nutrients that are lost through processing and can be a positive way to improve the nutritional profile of products.

Featured Suppliers

Jungbunzlauer Jungbunzlauer is the global market leader for Special Salts which are functional minerals mainly derived from Citric Acid, Gluconic Acid or Lactic Acid. The fully reacted products are manufactured in Europe by neutralization of these acids with the appropriate alkaline mineral source. The resulting organic minerals are known for their high bioavailability, and are used because of their ability to support human health in different applications of food, beverage, dietary supplements or pharmaceutical products.

SEAWEED & CO. The use of seaweed as a food ingredient is gaining huge momentum. The Puresea® range of seaweed powders and granules from Seaweed & Co. offers an incredible blend of health, nutrition, flavour & sustainability. Sustainably sourced and organic, it is the only natural vegan source of the essential nutrient iodine, as well as providing many other natural minerals. Specifically developed to be useful in almost any application. Its inherent umami flavour-boosting properties mean that it suits savoury applications, though PureSea® Protect which has no flavour at all can be used in sweet flavours too.

Nutrition Minus

Nutrition Minus is all about 'Reduction' & 'Replacement'. Though it's important to stay on top of legislative changes and in touch with media focus, manufacturers need to replace what is lost whilst adhering to consumers taste & texture preferences. Remember, there could be value-engineering opportunities that arise when replacing expensive ingredients such as fats or through avoiding additional taxations.

Sugar

With over 35 authorities implementing a sugar tax worldwide, including 11 countries from the EU since June 2018, it certainly seems that sugar has overtaken fat as the nutrient that concerns consumers the most. One of the most challenging reductions to overcome, sugar replacement requires the expected texture, mouthfeel and balance of sweetness, whilst avoiding the stigma that is attached to certain artificial sweeteners in order to maintain a clean label. Natural sweeteners are flourishing, with the global Stevia market set to exceed \$1bn by 2023 and the use of Erythritol doubling since 2012.

It's worth noting that functional fibres can help to reduce sugar in certain products, permitting them to leverage their health benefits too e.g. low glycaemic response, prebiotic effect, and general support for digestive health.



Featured Suppliers



As well as expertise in functional native starches, Ingredion also supplies solutions for sugar replacement, such as their high-intensity, naturally derived ENLITEN® sweeteners. Extracted from Stevia leaves, these ingredients can sweeten products without adding calories while delivering a clean taste profile similar to sucrose.



CEAMSA are an innovative industry leader in texturising solutions, offering a number of hydrocolloids sourced from natural bases including seaweeds and citrus peel. The range is perfectly suited to non-added sugar applications. Within the Confectionery industry, Ceamsa products contribute to enhance flavour release and to create desirable final textures.



TasteSense™ from Kerry offers natural flavour solutions that interact with taste receptors and add back the taste profile that is lost when sugar is removed. Derived from Kerry's heritage in plant extracts, it can be labelled as a 'Natural Flavouring'. Available as both a dry powder mix suited to bakery applications or a liquid for beverage.



Another excellent ingredient from Jungbunzlauer is their ERYLITE® Erythritol, a natural sugar replacement option that has a sugar like taste, and an acceptable sweetness. Unlike sugar, ERYLITE® is zero-calorie, non-cariogenic and it doesn't raise the blood glucose level since it has a very low glycaemic index. Since Erythritol is fermentation-based it means a 'natural' claim is possible. Importantly, ERYLITE® is more digestibly tolerable reducing the laxative effect commonly associated with sweeteners.



Despite falling into the same category as 'table sugar', sweetening options such as IMAG's organic agave syrup acts as a substitute allowing producers to replace sugar on label declarations with a more consumer-friendly ingredients list, whilst the end product generates a lower GI response helping to eliminate the significant blood sugar spike often associated with other sugar types.



Novozymes offers Saphera®, an enzyme solution that boosts sweetness and allows dairies to use less sugar in their formulations as well as production of a wide range of lactose-free products, including milk and fermented dairy products such as yogurt. Saphera® is an innovative non-yeast lactase with benefits over traditional yeast-based lactases, including better control of lactose elimination and cleaner taste, with less off-flavors during shelf life.

Fat

The number of new product launches in fat reduction is actually on the slight decline, however, it is coming from an incredibly high base suggesting that the demand for fat-reduced products isn't waning. Fat reduction could now be starting to evolve with WHO reports suggesting that diets high in trans-fats increase heart disease risk and deaths, leading to trans-fats limits being imposed on European manufacturers from 2021.

Featured Suppliers



Part of Ingredion's portfolio, the N-DULGE® and NOVATION® Indulge co-texturising starch ranges enable manufacturers to build back indulgent textures following the removal of ingredients such as fat and sugar. Further benefits include the potential for cost-savings and increased supply certainty through the replacement of more costly ingredients.



One of the key functionalities from CEAMSA's innovative range of texturising solutions is their use with fat-reduced formulations in bakery products. To this end, CEAMSA has developed CEAMFIBRE coming from citrus peel. Without an e-number, it can aid a clean label claim and deliver final texture in fat replaced cookies & muffins due to its water and oil binding capacity, providing eating qualities comparable to full fat control. At the same time, CEAMFIBRE will also fit with gluten-free products.



Acrylamide

Acrylamide is a suspected carcinogen that forms naturally in food during frying, baking or extrusion at high heat and low moisture. It has been a year since (EU) 2017/2158 came into force, obliging food manufacturers to apply acrylamide mitigation measures with lower, more stringent levels set to be introduced by the EU every three years. We have ingredients that can help combat acrylamide levels whilst minimising impact on taste & texture.

Featured Suppliers



Through Novozymes, we're proud to be able to bring you two unique asparaginase solutions to cover broad needs for reduction of acrylamide; Acrylaway® and Acrylaway® HighT. Both enzymes offer reduction of acrylamide content by up to 95% with no difference to the taste, texture & appearance of the final product, but each are adapted to specific temperature profiles for food processors to cover as broad a temperature spectrum as possible within areas like baked snacks, coffee, cereals & potato based products.

Sodium

Long been a target for reduction reformulations, salt is still the most used ingredient in food & beverage new product launches. That could be about to change as WHO member states have agreed to reduce the global population's intake of salt by a relative 30% by 2025.

Featured Suppliers



KODA™ Potassium Bicarbonate is the first choice for bakers looking to reduce the sodium content of chemically leavened products whilst maintaining end product quality. As a direct replacement for Sodium Bicarbonate and developed specifically for bakers, it can deliver up to a 50% reduction in sodium in baked goods. With its patented technology it remains a free-flowing, highly stable product to guarantee it's functionality over life.



The incredible PureSea® range of seaweed powders and granules from Seaweed & Co. has natural sources of glutamates providing umami flavour-boosting properties which reduce the need for salt. This is compounded by seaweed's natural shelf-life enhancing qualities, again another reason to reduce reliance on salt in concepts.



Jungbunzlauer has two primary approaches to sodium reduction: sub4salt® and Potassium Lactate. sub4salt® is a salt substitute, applicable for all kind of processed food, that can reduce sodium content by up to 50% when used 1:1 to regular salt. It has a purely salty taste with no metallic off-taste and is available in various grades including sub4salt® sea salt which meets the rising trend of sea salt in food products. Potassium Lactate has shown to be of great use in processed meat, where it can replace sodium based salts - also in combination with sub4salt® sea salt.

OVER 6 in 10 would like to see more low sugar **soft drinks** in stores

1 in 2 claim to check **SUGAR CONTENT**

Between 2005-2017 there has been an **8% REDUCTION** in sugar across a wide range of products

7/10 Consumers have already reduced sugar intake **58%** of consumers wanted to eat less sugar with **weight management** being a big drive



SALT INTAKE IN FINLAND DECREASED 30% over a 30 year period resulting in **75-80% decrease** in deaths from **HEART ATTACK & STROKE**



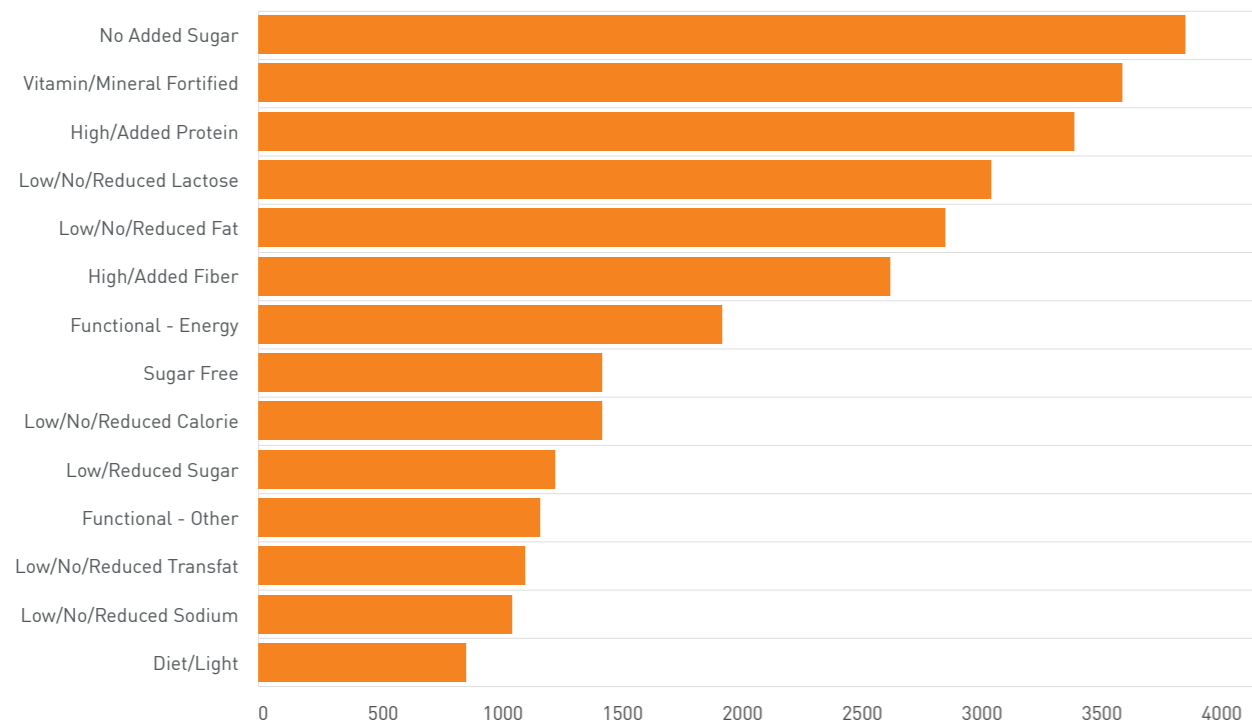
More than a quarter of consumers in many European countries agree that **'low in salt'** IS IMPORTANT WHEN LOOKING FOR HEALTHY FOOD

Almost 30% of low salt launches in 2018 were RELEASED IN THE UK & FRANCE

Wellness in the Market

Top 14 'Wellness' Claims in EMEA, 2019 YTD (source: Mintel GNPD)

Claim



Beverage

Found in Czech Republic, this Matcha Tea has been formulated high in protein and low in sugar. Its formula is enriched in vitamins and minerals (source: Mintel GNPD)



Snacks

Found in the Netherlands, these sour cream flavoured rice & bean chips are free from GMO, cholesterol, added MSG, gluten and trans fats. It is low in fat and contains fibre. (source: Mintel GNPD)



Meat Alternatives

Manufactured in Sweden, these black bean burgers are made of a high-protein bean mix made from soy cultivated in Europe, and flavoured with seaweed for a rich umami flavour. It is free from dairy, egg and gluten, freshly made and is quick and easy to prepare. (source: Mintel GNPD)



Bakery

Found in Spain. Described as a multigrain lean bagel, it is a wholegrain product with seeds that is high in protein and low in carbohydrates providing 64% less carbohydrates compared to standard. (source: Mintel GNPD)



Spreads & Sauces

Manufactured in Serbia, this hummus and ginger savoury spread is a 100% natural, vegan product that is listed as a source of fibre and contains no added sugars, preservatives or trans fats. (source: Mintel GNPD)



Prepared Foods

Manufactured in the UK, this East India inspired spiced rice & lentils is made with natural ingredients, is high in fibre and is a source of protein. A vegan-friendly product it is described as one of 5 a day, contains less than 270 calories and less than 2% fat. (source: Mintel GNPD)



Dairy

Launched in Morocco, and described as a blueberry flavoured quark specialty, this gluten-free product contains 32g protein, 0.2% fat and is listed to be ideal for athletes and protein diets. (source: Mintel GNPD)

What's Next for Wellness?

Healthy Ageing – An affluent, ageing population that is more focused on health makes for an interesting market.

Feel Good Food – Emotional & Mental wellbeing from food – whether as a sleep aid, stress reducer or productivity booster.

Beauty From Within – A merge between Food & Beauty as more food sources are released offering 'beauty from within' benefits

The DNA Diet – A merge between Food & Pharma as consumers control their health via preventative means based on their specific requirements

Hemp-based & CBD – A string of regulatory greenlights has turned the cannabis plant and its derivatives into a mainstream product source.

Want to know more? Get in touch for more market applications of the 'Wellness' trends...



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