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CONNECTED TO THE PLATE

Advances in digital technology are enabling consumers to get closer to their food through greater levels of transparency and knowledge.

CONSUMER ENGAGEMENT SMART LABEL

BLOCKCHAIN TECHNOLOGY

DISCOVERY: THE ADVENTUROUS CONSUMER

Consumers are on a big and broad journey of discovery, moving out of their comfort zones to explore bolder flavors and multisensory food experiences.

NEW FOOD EXPERIENCES STORYTELLING

ETHNIC FLAVORS

THE PLANT KINGDOM

The plant-based market shows no signs of slowing down. Brands are greening up their portfolios to attract even the mainstream consumer.

BRANDS 'GREEN-UP'

BOTANICAL FLAVORS

DEVELOPMENT OF HYBRIDS

I FEEL GOOD

9

Consumers have a rising interest in the role that nutrition can play in supporting emotional and mental wellbeing.

FEEL GOOD CLAIMS SUPPORTING BRAIN

CBD INFUSED

TOP TEN TRENDS 2019

INNOVA

MARKET

INSIGHTS

SMALL PLAYER MINDSET

going small in their strategy.

Start-up companies continue to shake up

the food and beverage industry, successfully

competing against major players who in turn are

POWER OF LOCAL INSPIRING FOOD GIANTS

START-UP INVESTMENTS

A FRESH LOOK AT FIBER

Renewed interest in fiber, going beyond digestive health benefits, is driving fiber applications.

GROWTH OF FIBER CLAIMS NEWLY DISCOVERED BENEFITS

7 NEW FIBER APPLICATIONS

EATING FOR ME

Technological advances and ever expanding choice in food service and retail are enabling consumers to adopt a more individual approach to eating.

INDIVIDUAL DIET NEEDS ENDLESS CUSTOMIZATION

6 PERS

PERSONALIZED

SNACKING: THE DEFINITIVE OCCASION

Meeting the evolving expectations around snack products is a strong focus for innovation across all food and beverage categories.

HEALTHY SNACKING

SNACK FORMAT INNOVATIONS

SNACKIFICATION 5

5

ALTERNATIVES TO ALL

Consumers pay attention to health and sustainability, pushing more innovation in replacement foods and ingredients.

ALTERNATIVES BRING CHOICE

3

SUBSTITUTE INGREDIENTS ALTERNATIVE PROTEINS

GREEN APPEAL

Brands increasingly commit in market actions and innovations across both product and packaging to answer consumer expectations around sustainability.

FIGHTING FOOD WASTE COMMITTED TO SUSTAINABILITY

PACKAGING INNOVATIONS

4

Trend 1. Discovery: the Adventurous Consumer

Globalization sparks the consumer's curiosity to discover new food and drinks

INCREASING BRANDING EFFORTS ON DISCOVERY

BRANDS BRING NEW VARIETIES TO THE MARKET

+35%

Growth of new food & beverage launches tracked with a **discovery** claim.

(Global, 2017 vs. 2016)

Discovery claims include: discover, explore, uncover, unveil, unravel.









Arousing consumer curiosity by including an element of surprise

TEMPERATURE SHOCK



Source: instagram.com/skittles

THIS IS NOT WHAT IT SEEMS



Source: instagram.com/duckseatery

ACTIVATE YOUR SENSES



Source: SIAL Paris 2018

Flavors -

Sizzling' strawberry
Fiery watermelon
Blazin' mango
Lemon spark
Flaming' orange



duckseatery • FollowDucks Eatery

duckseatery Don't let that caramelized skin fool you - this smoked "ham" is 100% (

"Basiron's Black Lemon's dark color, smooth dairy and refreshing taste of lemon and lime will activate your senses to the max!"

Source: veldhuyzenkaas.nl/merk/basiron-black-lemon



Trend 2. The Plant Kingdom

Eating plant-based is becoming mainstream, industry thrives on plants

CONSUMERS MAKE HEALTHIER FOOD CHOICES





Source: Innova Consumer Lifestyle and Attitudes Survey (2018)

PLANT INGREDIENTS SOAR ACROSS CATEGORIES



Brands 'green-up' their portfolio to attract the mainstream consumers who want to add more plantbased options to their diet.





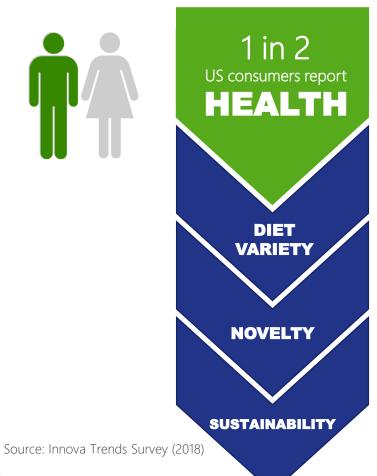


Trend 3. Alternatives to All

Alternative dairy, alternative proteins, alternative sweeteners, etc. – there is now an alternative for everything.

HEALTH REMAINS BIGGEST DRIVER FOR CONSUMERS





...as a reason for buying alternatives to bread, meat or dairy.

ALTERNATIVES SPREAD TO MORE CATEGORIES









Trend 4. Green Appeal

The industry increasingly commits to answering consumer expectations around sustainability

SUSTAINABILITY INITIATIVES ARE A MUST

SUSTAINABILITY DRIVES CORPORATE GOALS

2 in 3

US, UK and Chinese consumers expect companies to invest in sustainability these days

Source: Innova Trends Survey (2018)











Trend 5. Snacking: the Definitive Occasion

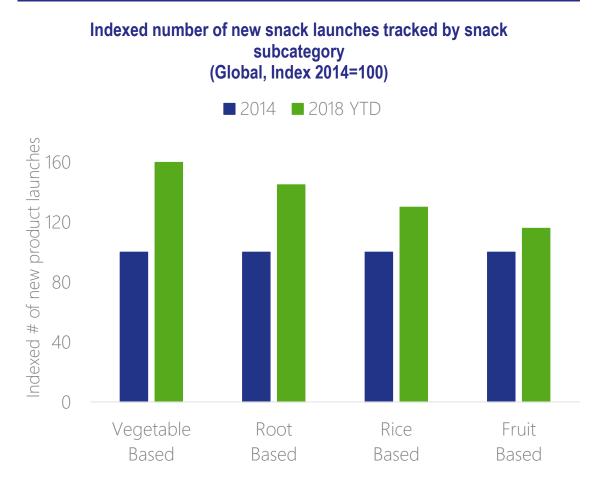
Snacking is no longer the optional extra, but the definitive occasion

WELLKNOWN BRANDS LAUNCH SNACKING VERSIONS





HEALTHY SNACKING OPTIONS SHOW FAST GROWTH





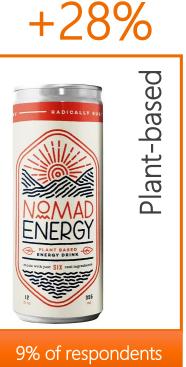
Trend 6. Eating for Me

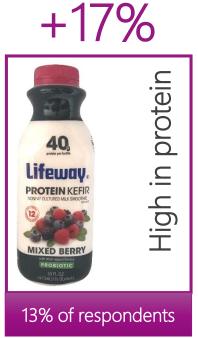
Individual needs and preferences: big impact on new product development

+76%











% of US consumers that followed any of the next diets the past year.*

Growth (in %) of new food & beverage launches tracked with selected dietary claims (Global, 2017 vs. 2016)

*Innova Trends Survey (2018)



Trend 7. A Fresh Look at Fiber

The return of fiber as an essential food ingredient

A GROWING INTEREST FOR FIBER

44%

of US respondents are increasing their consumption of fiber

33%

of UK respondents are increasing their consumption of fiber

Source: Innova Trends Survey (2018)

FILLING THE FIBER GAP: INCREASED LAUNCH ACTIVITY



5百合田食纤维

7.5g



5 FIBRE BARS





average annual growth of new



Trend 8. I Feel Good

Rising interest in the role that nutrition can play not only in physical but also in emotional wellbeing

EMOTIONAL HEALTH KEY FOR HOLISTIC WELLBEING

- Mood: The feeling of satisfaction, happiness, joy and excitement positively influences a person's mood.
- Comfort: A relaxing drink or comforting food calms the nerves and gives a feeling of relaxation.
- A clear mind: Clear thinking, having the ability to concentrate and making and recalling memories are necessities for emotional health.



"My mental health is as important as physical health for my overall wellbeing"

Source: Innova Consumer Lifestyle and Attitudes Survey (2018)

CAN FOOD CHANGE YOUR MOOD?

+36%

Growth of new food & beverage launches tracked with a **feel good** claim. (Global, 2017 vs. 2016)

Feel good claims include: happy and joy









Trend 9. Small Player Mindset

Start-up companies continue to shake up the food and beverage industry

THE POWER OF LOCAL HOOKS CONSUMERS

MAJOR PLAYERS ARE GOING SMALL IN THEIR STRATEGY



...US and UK consumers **prefer small brands** because smaller companies are more dedicated to their products and **have a personal story**.

Source: Innova Trends Survey (2018)



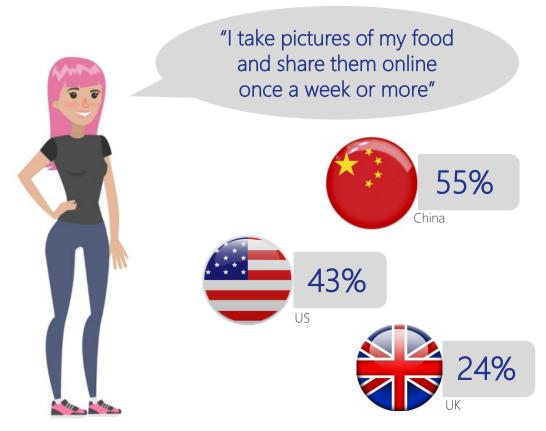
"We want to bring a contemporary, modern-day twist to Indian food. Our products will always be Indian in DNA but can stand up to any global product."



Trend 10. Connected to the Plate

Social media enabling consumer co-creation for new product development

YOUNG CONSUMERS SHARE WHAT THEY EAT ONLINE



% of <u>26-35</u> year olds saying they <u>take pictures of their food and share them</u> online <u>once a week or more (Innova Trends Survey, 2018)</u>

FANS INVOLVED IN FLAVOR INNOVATION

Through **#myoreocreation**, Oreo let fans decide which new flavor would enter the market.

Cherry Cola was the winning flavor.









THANK YOU!

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