Top 10 trends for 2015

The impact on sweets & snacks

ISM 2015 - Cologne
Innova Market Insights

- Innova Market Insights is the source for inspiration for your company and gives you insights on innovations in food & beverage in every major market in the world.
Top Ten Trends 2015

1. FROM CLEAN TO CLEAR LABEL
2. CONVENIENCE FOR FOODIES
3. MARKETING TO MILLENNIALS
4. SNACKS RISE TO THE OCCASION
5. GOOD FATS, GOOD CARBS
6. MORE IN STORE FOR PROTEIN
7. NEW ROUTES FOR FRUIT
8. A FRESH LOOK AT FROZEN
9. PRIVATE LABEL POWERS ON
10. RICH, CHEWY & CRUNCHY
From clean to clear label

**Claims**
Moving beyond clean label

*From claim to information*
‘Natural’ claims are not defined by regulation and confuse consumers. In response, some manufacturers and retailers have chosen to show lists of what ingredients are (not) in their products.

“Absolutely nothing artificial. No MSG, artificial flavors or colors. Seasoned with real food ingredients. Made using only sunflower oil.”

**Ingredient labeling**
More transparency

*Consumers want to understand*
Consumers want to know where ingredients come from (*source of origin*) and understand what is in the products they eat (*understandability*).

Ingredients: Select vegetables in variable proportion (parsnips, sweet potatoes, beetroot), sunflower oil, sea salt.
More transparency on vegetable fats labeling in EU

- As from January 2015, the new EU Food Information to Consumers (FIC) regulation will require the specification of vegetable fats used in food products.
- To inform the consumer about the attention for the sustainable sourcing of these fats, more manufacturers will use RSPO or Rainforest Alliance logos.

![Graph showing the share of launches tracked with palm oil on ingredient list (West Europe)](image)

**Delhaize Dark Chocolate Bar With Chocolate Mousse Filling (Romania, Sep 2014)**

Claims/Features: **RSPO certified sustainable palm oil – mixed.**
Convenience for foodies

- The increasing demand for home cooking products is driven by:
  - Health concerns
  - Cost
  - Social

Chocolate surprise truffles

Rolled in toasted hazelnuts and cocoa

These chocolate truffles make great gifts, and a pinch of chilli in one or two spices things up”

Serves: 40
Preparation time: 25m (plus chilling time)

Super easy
New DIY products for home-baking

• More baking ingredients are targeted at baking from scratch: recent product launches include on-trend recipes, transparent packaging and a focus on clean label.

Boites Gourmandes Les Cookies Cookie Mix With Milk Chocolate Chips And Caramelized Hazelnuts (France, Nov 2014)
Claims/Features: Just add egg and butter. No preservatives, colorings or artificial flavors.

Jumbo Maak Je Eigen Cranberry Oat Cookie Mix (Netherlands, Dec 2014)
Claims/Features: super good and super fun. Add some butter and an egg and have delicious, homemade cranberry oat cookies.

Dough It Yourself Oaty Raisin Cookie Mix (United Kingdom, Aug 2014)
Claims/Features: Handmade using no artificial additives. Simply mix, pop in the oven and enjoy the taste of fresh home baked cookies.
Cloetta moves to UTZ-certified Cocoa

28 March 2014 | Svensk version

Cloetta will certify the entire chocolate assortment with sustainable cocoa from UTZ Certified farmers by 2014.
Snacks rise to the occasion

**Breakfast**

**Belvita Breakfast Biscuits: Cranberry (Ireland, Nov 2014)**

**Afternoon**

**Raw Super Food Organic Chocolate Bar With Raisin And Nuts (Netherlands, Sep 2014)**
Description: Organic chocolate bar with raisin and nuts. Delicious as sensible snack.

**Evening**

**Lindt Creation Dessert Assortment Of Chocolates (France, Nov 2014)**
Description: Assortment of 21 French pastry style chocolates: 3 meringues, 3 tiramisu, 3 caramel eclair, 3 creme brulee, 3 brownie, 3 chocolat cake, 3 millefeuille.
Good carbs: comeback of carbohydrates

- Unrefined and alternative grains are increasingly tracked in product launches
  - Global product launches tracked with ancient grains as ingredient have grown with a CAGR of +20%.
  - Global breakfast cereal with a wholegrain claim has grown +30% from 2012 to 2013.
  - Oats is trending in cereal bars and biscuits & cookies.

**Global product launches tracked with wholegrain, ancient grains and oats**

![Graph showing the trend of global product launches tracked with wholegrain, ancient grains, and oats from 2010 to 2013.](image)
Nuts and seeds are marketed as source of good fats

Gerble L Expert Dietetique
Sable Nature Graines De Chia: Sand Nature Chia Seed Biscuits (France, Sep 2014)
Claims/Features: Source of well-being. The linolenic alpha acid content in the chia seeds belongs to the family of omega 3. It helps maintain normal levels of blood cholesterol. **Source of omega 3.** Selected non-hydrogenated vegetable oil: 100% rapeseed.

Borges Natura Frutos Secos Crudos Y Frutas Desecadas: Raw Nuts and Dried Fruits (Spain, Dec 2014)
Claims/Features: High in fiber. **Source of magnesium and iron which helps reduce tiredness and fatigue.** **Source of phosphorus contributing to the maintenance of bones in normal conditions. High in omega-3 fatty acids.** **Contains alpha linoleic acid which helps maintain normal blood cholesterol levels.**

Myprotein Natural Walnuts (Italy, Sep 2014)
Claims/Features: **Extraordinary source of omega-3 fatty acids.** It can help to reverse the damage caused by a diet rich in saturated fat. Excellent appetite suppression.
More in store for protein

- Protein claims are tracked outside the athletes and weight management segments and are increasingly seen in mainstream:
  - Mainstream protein products aim at satiety
  - Protein claims among global dairy launches tracked CAGR is +34% from 2010 to 2013.
  - 15% of new cereal product launches tracked in 2013 carried a protein claim.
Private label powers on

- The share of private label in new product development in chocolate confectionery is increasing in Western Europe, moving up from 15% in 2009 to 22% in 2013.
- In savory/salty snacks the share of private label in NPD increased from 21% to 28%.

**Share of private label in product launches tracked in West Europe**

- **Food & beverages**
  - 2009: 22.0%
  - 2013: 25.8%

- **Chocolate confectionery**
  - 2009: 14.9%
  - 2013: 22.1%

- **Savory/salty snacks**
  - 2009: 0%
  - 2013: 28.1%

**Jumbo Winter Bonbons Assortiment (Netherlands, Feb 2014)**
New routes for fruit

Acti-Snack+ Sweet & Sour Mango Power Pack (United Kingdom, May 2014)
Claims/Features: Additive free. Gluten free. Fat free. Source of vitamin C. Vitamin C contributes to the reduction of tiredness and fatigue.

Healthy People Golden Berry Mix (Netherlands, Jun 2014)
Description: Super snack fruit from golden berry mix made with golden berries, dried cranberries and raisins, in a 125g plastic pouch.
Claims/Features: Rich in fiber. Healthy fruit snack.

Fruigees Kalefornia Grape Organic Fruit Snack (United Kingdom, Nov 2014)
More texture claims tracked in indulgence categories

- The share of savory snacks launches carrying a texture claim increased from 15% in 2010 to 18% in 2013.
- Manufacturers use texture claims to differentiate their product from others and to stress the indulgence character of the product towards the consumer.

Share of product launches with a texture claim in total savory/salty snacks (West Europe)

<table>
<thead>
<tr>
<th>Year</th>
<th>% of total launches</th>
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<tbody>
<tr>
<td>2010</td>
<td>14.6%</td>
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<tr>
<td>2011</td>
<td>15.5%</td>
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<tr>
<td>2012</td>
<td>15.7%</td>
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<tr>
<td>2013</td>
<td>17.5%</td>
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Crispy Natural Crunch Me Apple Chips (Poland, Jun 2014)
Conclusion

- Recent innovation in sweets and snacks has focused on creating *permissible* indulgence. Producers are aiming to differentiate by using natural, healthy and/or sustainably sourced ingredients.

- There is more transparency observed in the communication about ingredients as well as the production and sourcing process - both on pack as via online channels.

- Health, cost and social factors have driven the consumer interest in home cooking. In response to this demand producers are launching convenience items for foodies.

- The demand for healthy, satiety inducing and energy-boosting snacks has increased, which has resulted in a large number of new fruit and nut snacks product launches.

- Private label is on trend and increasingly active in new product development.

- More communication about texture is tracked on pack. To achieve extra indulgence recent innovation has played with inclusions, fillings and layers to create new textures.