

INTERNATIONAL

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Health & Wellness

JORGE SARASQUETA

“El Top Ten en Tendencias de Salud y Bienestar”

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Health & Wellness Trends 2011

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Presentation overview

- **Trend 1: “Proven” the new buzzword**
- **Trend 2: Return to softer claims**
- **Trend 3: New Relaxation Paradigm**
- **Trend 4: Fruit & Veg Revival**
- **Trend 5: Joint Health Boosters Trend**
- **Trend 6: Strengthening Immunity**
- **Trend 7: Alternative Protein Sources**
- **Trend 8: Healthy Mind, Healthy BodyTrend**
- **Trend 9: Fiber Triumphs on Gut Feeling**
- **Trend 10: Out of the Box Weight Loss**



Trend 1:

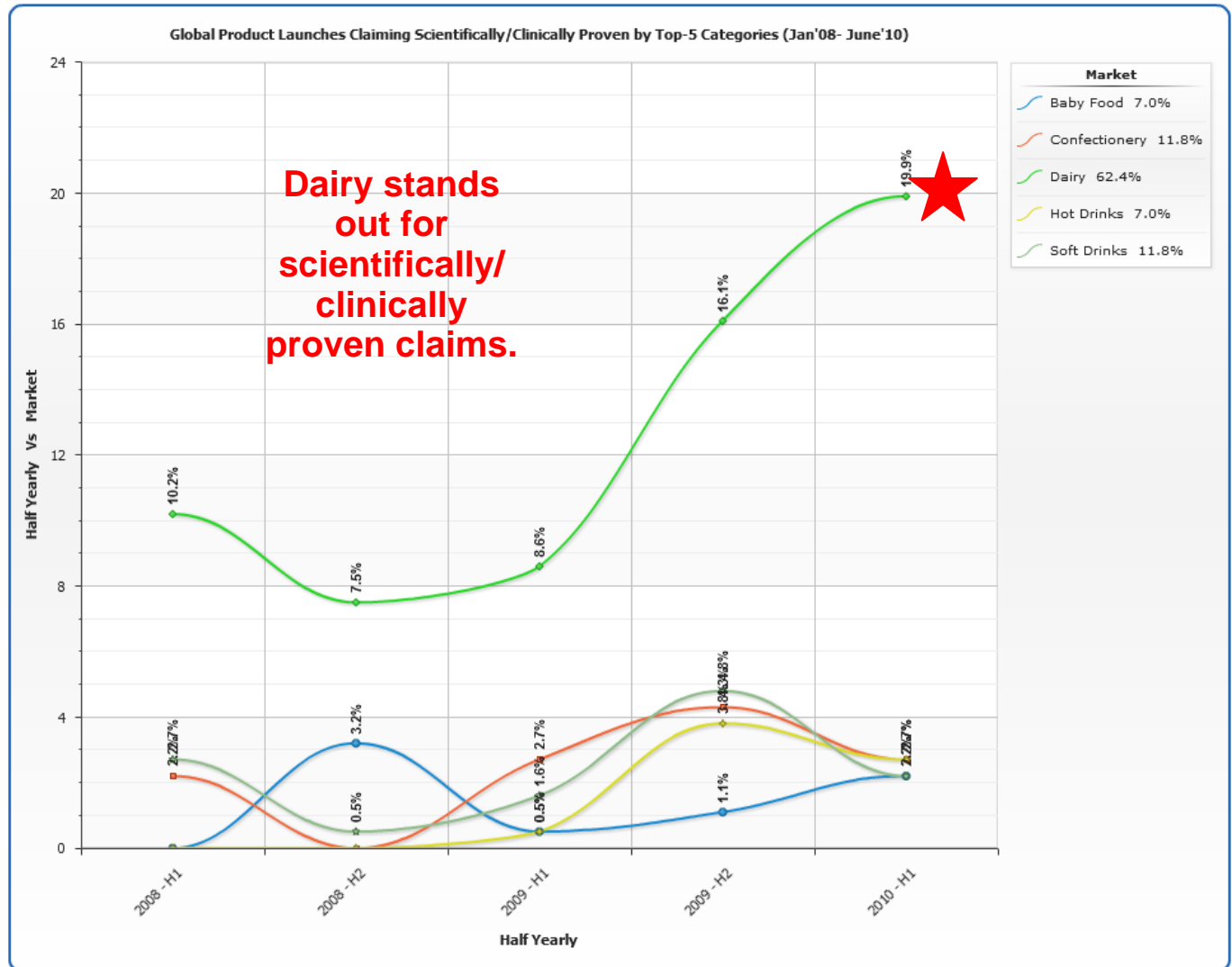
“Proven” the new buzzword

Product launches claiming “Proven”



Colombia: Alpina Finesse Diet Yogurt with Muesli

Limited edition.
Probiotics. 0% fat. Low cholesterol. Organic. Low calorie



“Scientifically Proven...”



Wrigley's Extra Ice White Chewing Gum

Sugar free. Helps keep teeth clean in a way you can feel. **Scientifically proven to help remove stains and maintain teeth's natural whiteness.**



Danone Danacol Low Fat Fermented Milk Drink with Red Fruits

Belgium: Milk Drink with Red Fruits
Danacol **lowers your cholesterol with plant sterols**. 0% added sugars. Plant sterols efficacy, scientifically proven. One bottle contains 41Kcal (2% of the GDA).

'Clinically Tested'

Good Belly Splash Probiotic Juice Drink with Pomegranate Blackberry Flavor

USA: Organic Probiotic juice drink, a new kind of drink that's light and refreshing and **packed with powerful probiotics to help you support your core digestive health and immune system** all day long.



Clinically Proven



Changing Regulatory System

The global change on the regulatory system will force many products to drop health claims from the labels and advertisements. Approved ingredients will be added to claim for a specific health benefit.



EFSA Accepted Opinion (Dec 10): foods providing 3g of oat beta-glucan per day can bear the health claim:

“Oat beta-glucan has been shown to lower/reduce blood cholesterol. Blood cholesterol lowering may reduce the risk of heart disease.”

Applicant: CreaNutrition AG

Claim: Super juice with added oat beta glucan to help lower cholesterol. Rich in vitamin C. 2 of your 5-a-day. Suitable for vegetarians



Recent EFSA Approval (2011)
Few products on the market relating beta-carotene to immune health benefits in Europe.

Beta carotene and protection of DNA, proteins and maintenance of the normal function of the immune system

Launched in the USA, claim:
Excellent source of protective antioxidant vitamin A (from beta-carotene) to help support a healthy immune system.

Promoting ingredients on pack

EFSA: Accepted/ Approved Ingredients (extract)



Scientifically proven



EFSA: Accepted Ingredients		
Activated Charcoal	Folate	Pectins
ALA	Glucomannan	Phosphorus
Animal protein	Guar Gum	Plant Sterol/Stanol
beta carotene	HPMC	Polyphenols - Olive
Beta Glucan	Iodine	Potassium
Betaine	Iron	Protein
Biotin	Lactase Enzyme	Resistant Starch
Caffeine	Lactulose	Riboflavin
Calcium	L-arginine	Selenium
Calcium & Vitamin D	Linolenic acid	Thiamine
Carbamide	Live yoghurt culture	Vitamin A
Chloride	Magnesium	Vitamin B12
Choline	Manganese	Vitamin B6
Chromium	Melatonin	Vitamin C
Copper	Molybdenum	Vitamin D
DHA	MUFA/PUFA	Vitamin E
DHA & ARA	Niacin	Walnuts
EPA & DHA	Oat Beta glucan	Water Soluble Tomato Concentrate
EPA & DHA & DPA	Oleic Acid	Wheat Bran Fibre
Fluoride	Pantothenic acid	

Crunchy wholegrain cereals with nuts, made with beta-glucan (EFSA approved) from oat bran which helps control cholesterol and takes care of the heart

Proven is an opportunity

**Claim Approved:
Fresh Cheese & Bone Growth
Approved**

- Unilever: linking diet & health (with TNO)
- Nestle: targeting food + pharma opportunities
- PepsiCo: new Global Nutrition Group



*Portugal, Relaunch, Jan 2010:
Enriched with calcium + vitamin D
formula. Helps the growth of strong
bones. Low fat*

Helps maintaining a healthy cardiovascular system



Fruitflow helps maintain a healthy cardiovascular system by keeping platelets smooth and reducing platelet aggregation. A natural and safe ingredient, Fruitflow does not disrupt the blood clotting process required following injury.



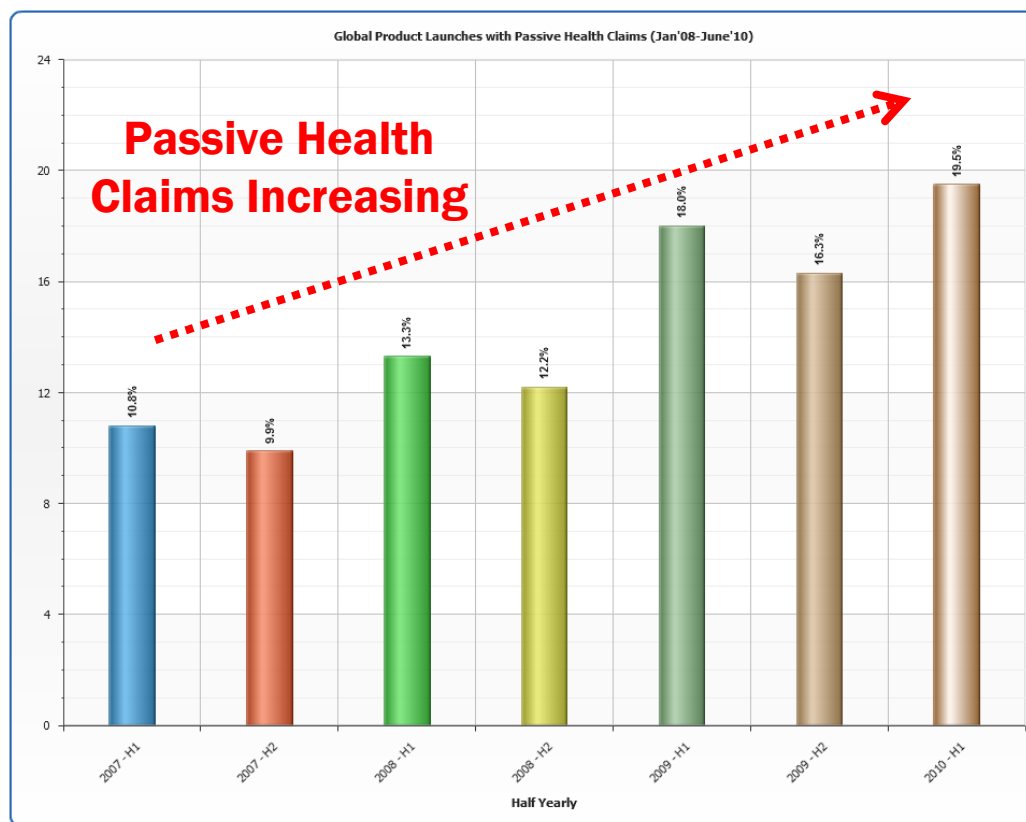
Trend 2: Return to softer claims

The return to softer claims

A cloud of uncertainty hovering over health claims has resulted in a fall in numbers of food and drinks products launched on an “active health” [food plus] platform, despite of growth in “passive health” [food minus] launches.



0% trans fat. 25% less sodium. 70% less saturated fat. Gluten free.



Wellness Food



Odwalla Wellness Fruit Juice Drink Blend with Orange Honey Passion Flavor

United Kingdom Orange honey passion flavored wellness fruit juice blend, with vitamins and zinc.

In each serving of Wellness you will find a 44mg helping of **echinacea**, as well as 250% DV of **antioxidant vitamin C** per serving. Excellent source of **zinc**. No GMO.



Bio Planet organic steak.

Belgium: Wellness food rich in **Omega-3**. **0% soy**,

Ingredients: Water, rapeseed oil*, wheat starch*, corn glucose*, red and green pepper*, corn, egg white*, guar gum, wheat bran*, sesame seed*, sunflower seeds*, sea salt, spices*; *of organic culture.

“Free from....” for people with food allergies

More passive health claims and “free-from” items have been launched recently. Retailers are responding to increasing consumer demands and growing needs for these products.



Sainsbury's Freefrom range

Range of products, **free-from wheat, gluten and/or dairy.**

UK:



The Netherlands: Billy's Farm Organic Multi-grain Cookies

No artificial flavors. **Free from soy, lupine, peanut, egg and milk (lactose).** Made with organically grown ingredients. Suitable for vegans.

Sodium reduction movements

Product launches claiming salt reduction are increasing primarily due to the global salt reduction programs in response to pressure from governments and consumer groups.



France: Herta Allumettes Fumées Au Bois De Hêtre -25% De Sel: Low Salt Smoked Bacon Pieces

25% less salt premium smoked bacon pieces.



Knorr Quick Vitalie No Added Salt Pumpkin Soup

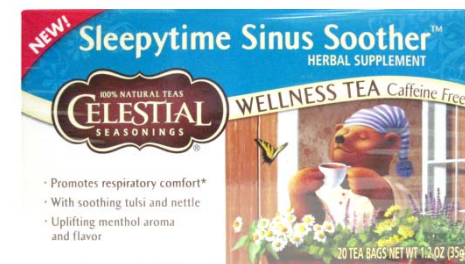
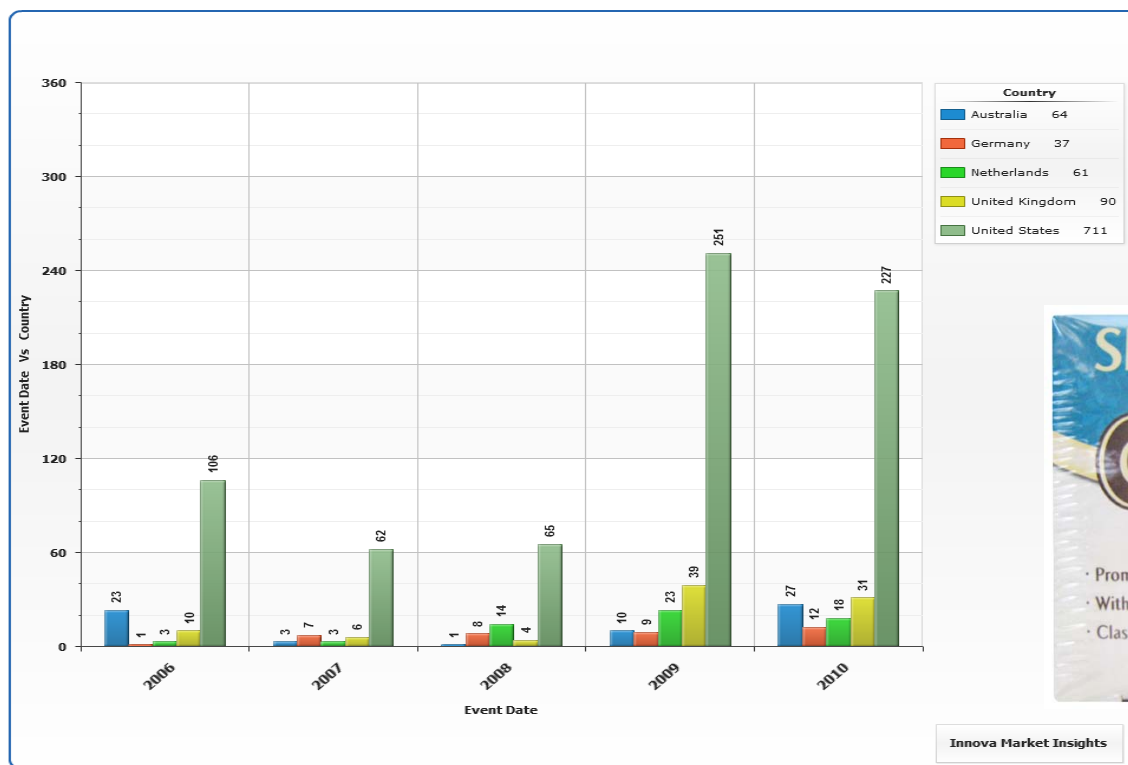


Trend 3:

New relaxation paradigm

Still on trend: products promoted relaxation or sleep

Innova Market Insights tracked 383 new products in 2010 featuring the word “sleep,” down slightly from the 424 tracked in 2009, but still far ahead of the circa 130 tracked in 2007 and 2008. The US accounted for the lion’s share of launches.



Celestial Seasonings Sleepytime Extra Herbal Supplement

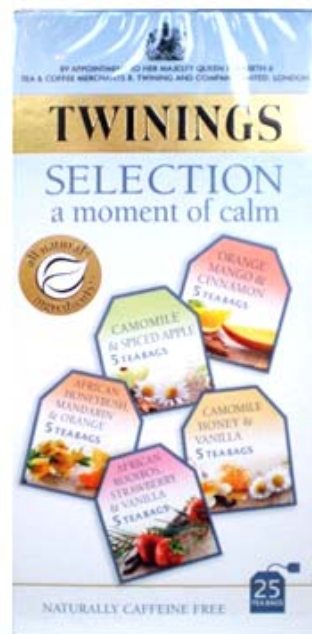
Tea a “cool” premium experience to partake in

- Tea is taking on a relaxation mantle in some instances, with the number of tea launches rising strongly in the year to September 2010 and about 5% of them featuring the word “relax.”
- Tea products are also using herbs and even botanical inclusions that contain the right nutrients to encourage relaxation and a good night’s sleep.



The Relaxing Tea is a delectable tribute to traditional Kava, **perfect for stressful times or when you just feel like sitting back and enjoying life.**

USA: The Relaxing Tea is a calming blend of all-natural tea and legendary Kava root, native to the islands of the South Pacific.



*UK: Twinings A **Moment Of Calm** Selection 25 Tea Bags*

A range of infusions blended with relaxation in mind.



Zero-calorie Drinks for Sleep and Relaxation

Melatonin is an antioxidant known for regulating the body clock. It is produced in the human brain and plays a role in sleep & ageing. Millions of people have sleep disorders and often they are using products or supplement containing melatonin to fight against this discomfort.



USA: Dream Water : Kiwi and Plum

Dream Water, a rest and relaxation beverage from Sarpes Beverages. It has zero calories and features a proprietary formula of time-tested, all-natural active ingredients **to help consumers relax and fall asleep**, including GABA (Gamma-Aminobutyric Acid) to help one relax, Melatonin to help induce sleep, and 5-htp (Tryptophan) to help improve the quality of sleep.



USA: Tranquila Original Relaxation Shot: Green Tea Lemon

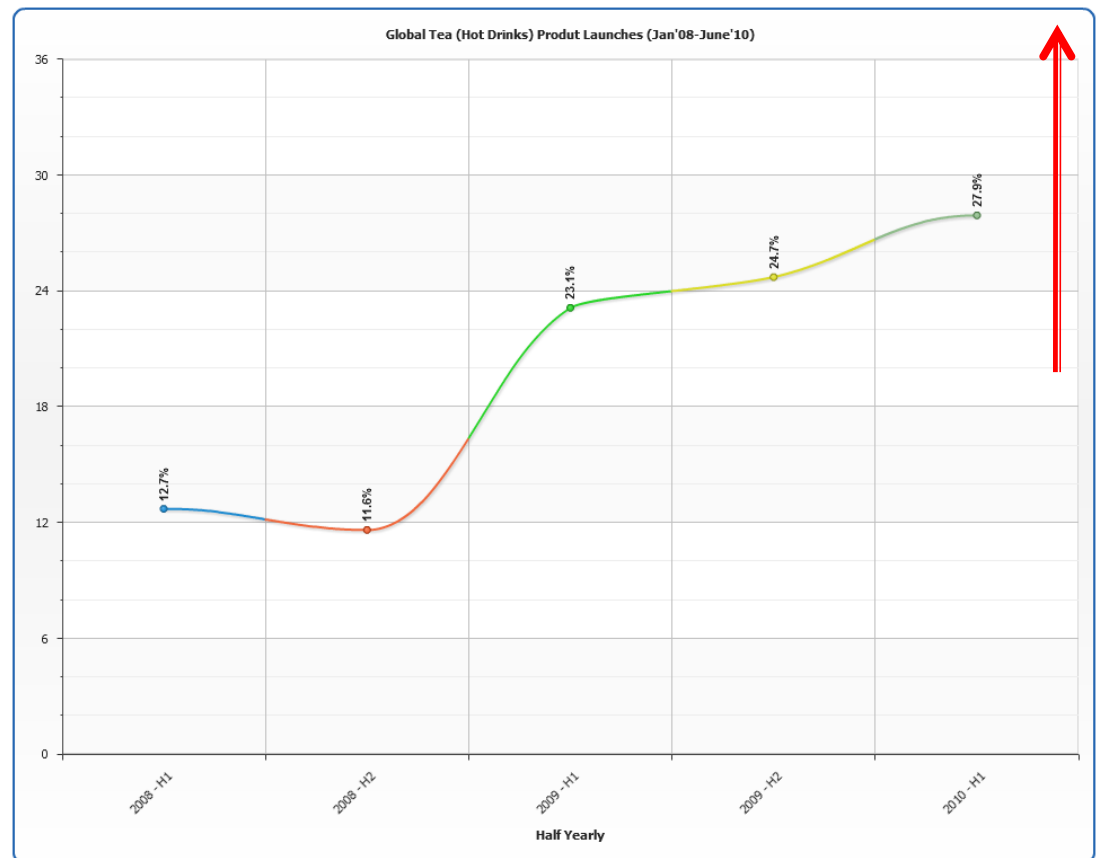
For daytime it helps reduces anxiety, improves mood, and boosts immune system. Contains no sugar, carbohydrates or calories. Featuring a refreshing green tea/lemon flavor each shot is a soothing blend of herbal extracts, natural flavors and vitamins.

Move over coffee – Time for tea

While the use of coffee as a flavor exploded during the last decade, it could be the turn of its traditional competitor to surge.



IFE London 2011: Ayurvedic Young and Fun Herbal green tea Infusion



Enjoying the moment

Wellbeing and enjoyment don't have to be always linked to healthy products or health issues. It contributes to overall wellbeing as a kind of anti-stress.



**UK: Uneathed Chorizo in Mojo
Pepper Sauce. Tapas, simply cook
and serve. Chorizo is prepared with
108g of pork per 100g of product**

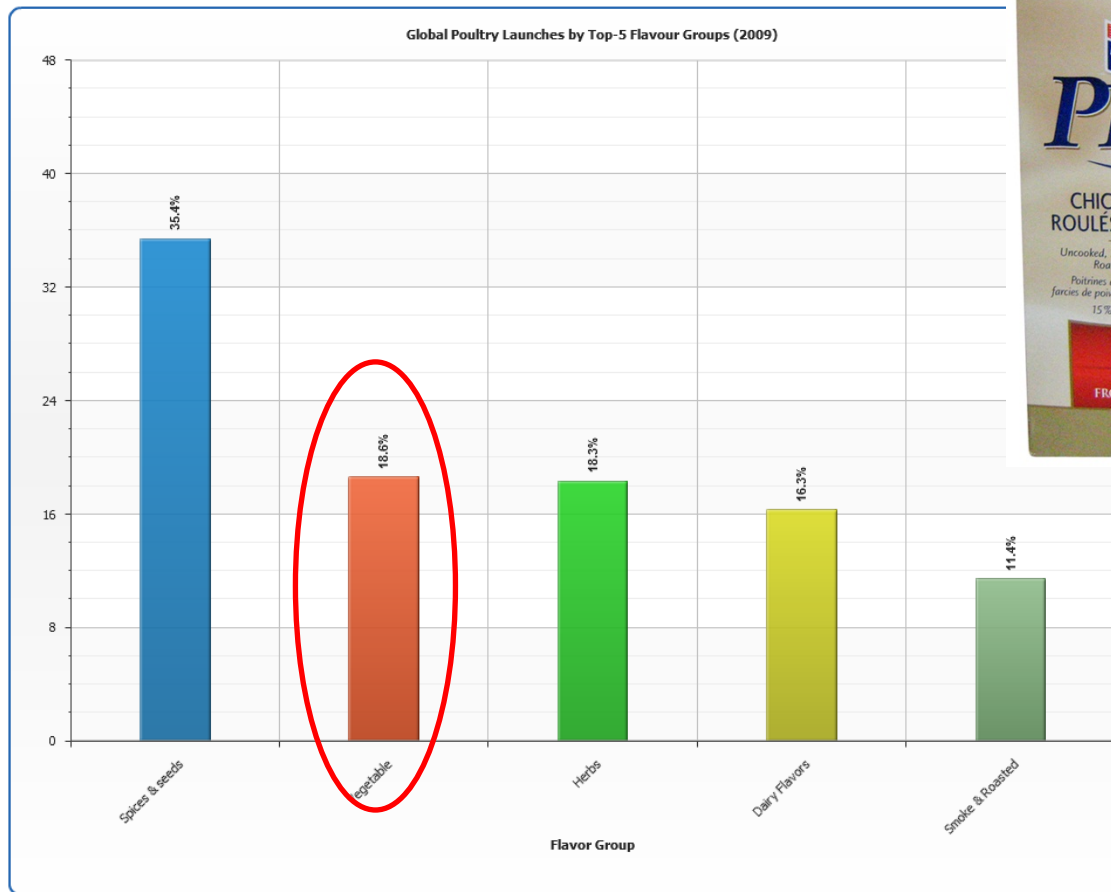




Trend 4: Fruit & Veg Revival

Incorporating vegetables

Incorporating vegetables into products for a healthier meal.



Canada: Prime seasoned chicken breast fillets with roasted red peppers, goat cheese, and basil



Whole fruit for nutrition

- Novel Coca-Cola process unlocked inherent orange benefits.
- New Minute Maid orange juice created by pressing the entire orange, including the peel, thereby offering double the antioxidant content of the company's regular Minute Maid.
- Spain -Todo Naranja (the whole orange), is made using Coca Cola's patented Wholepress juice processing technology.



Vegetable fibres for meat free



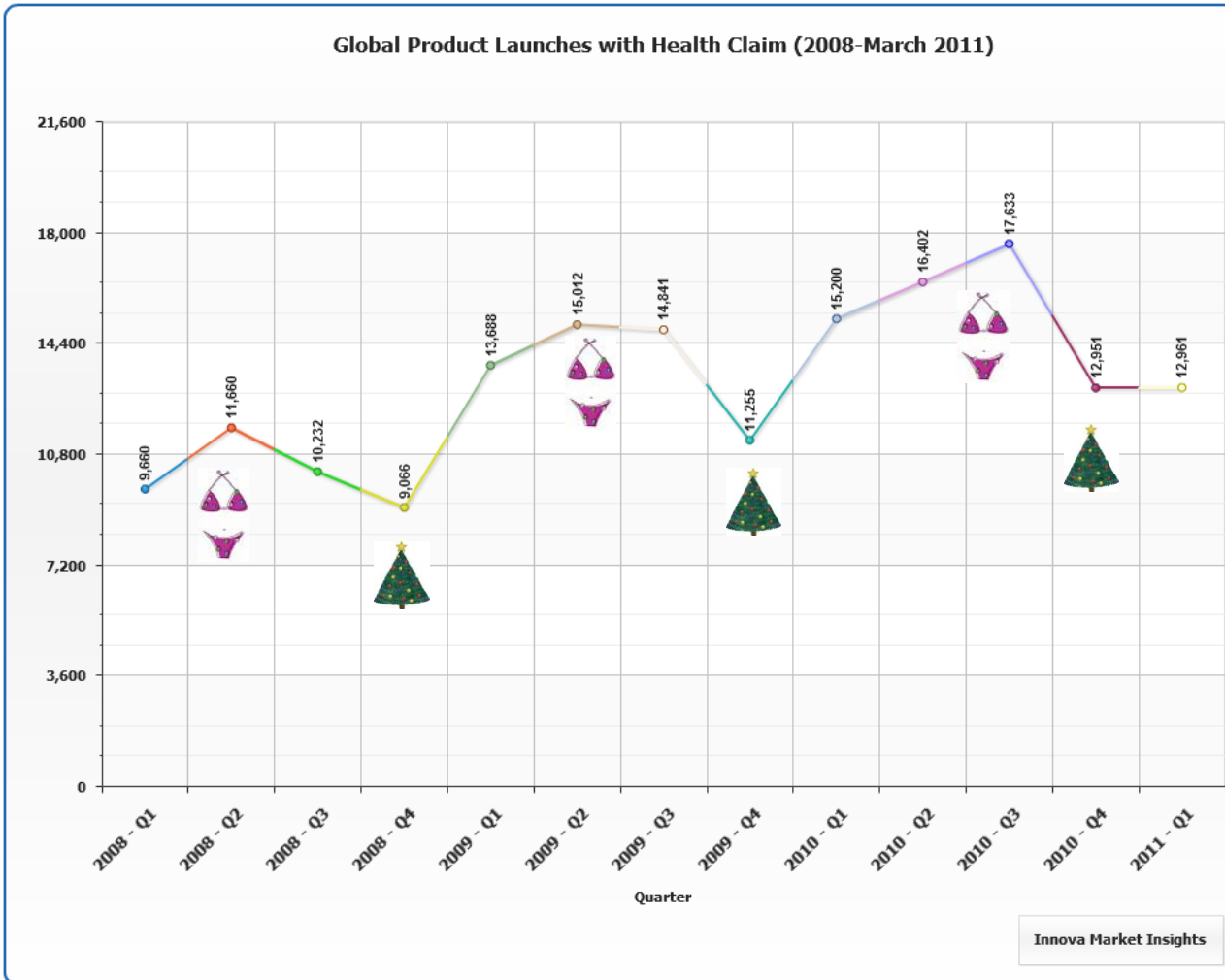
The Netherlands: Meatless is based on: Wheat, Lupin, Rice

Meatless is a 100% vegetable hydrated fibre and is an excellent basic material for the production of vegetable meatfree products. Meatless is also used worldwide to develop tasty and healthy hybrid products containing meat or fish and vegetable raw materials.



Trend 5: Joint Health Boosters

Health & Wellness: it is the big trend



Joint Health Boosters

There are millions of aging but active people throughout the world who are looking for ways to enhance their quality of life and retain their lifestyle without joint discomfort.

Keep doing what you love.

Joe Montana
Legendary
Quarterback



USA: Joint Juice introduced the reformulated Joint Juice Supplement Drink.



Mainstream enterence: Glucosamine and chondroitin



*Naturally high in calcium for healthy bones. **Added glucosamine for healthy joints. Added chondroitin for healthy cartilage.** With green tea which contains antioxidants and vitamin D which helps the absorption of calcium and phosphorous, vital for maintaining strong bones. For active people who want to stay active. With added supplements.*

Indonesia: High calcium. Low fat. HiLo Active is enriched with glucosamine and chondroitin.

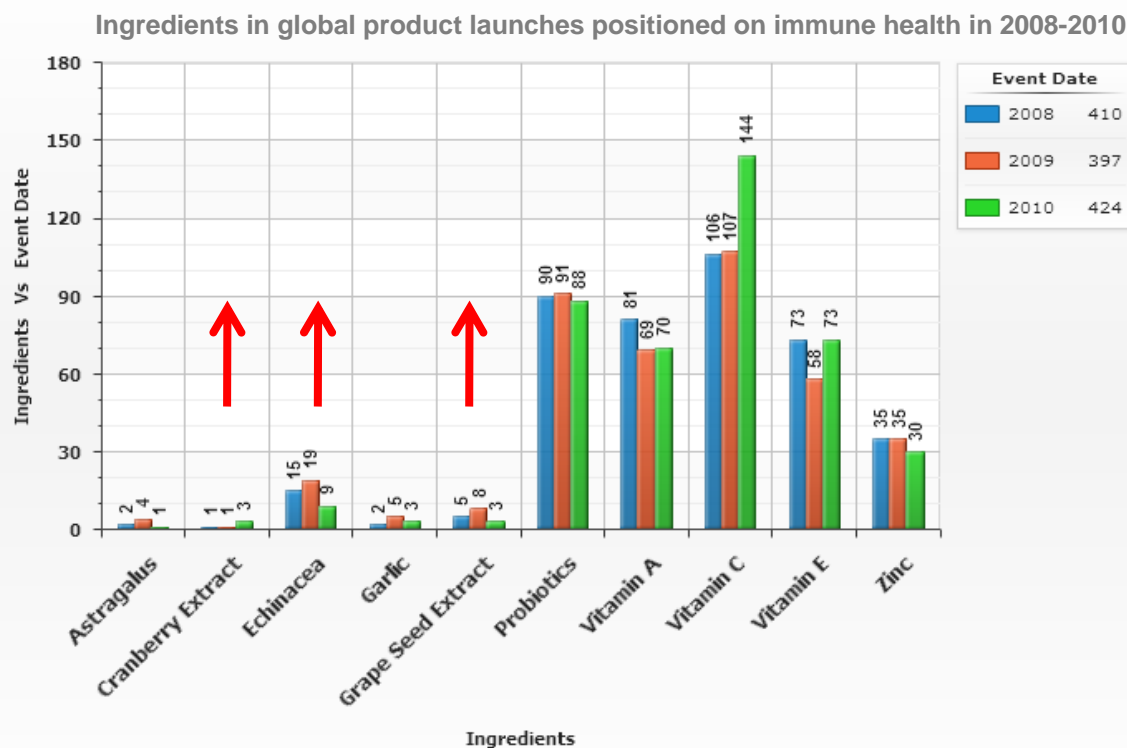




Trend 6: Staying Immune

Emerging flavor trends on immune health

Echinacea, cranberry or grape seed caused a trend in wellness or 'feel good' products. These ingredients are not only for a better immunity but also focus on wellness, for example, vitality and relaxation.



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Natural prebiotic fiber inclusions



Mexico: Aguamiel de Maguey Organico Natural: Organic Agave Cactus Sap (Juice)

Natural source of prebiotic, soluble fiber, calcium, potassium, and vitamin C. Contains antioxidants. No sugar added. No preservatives.

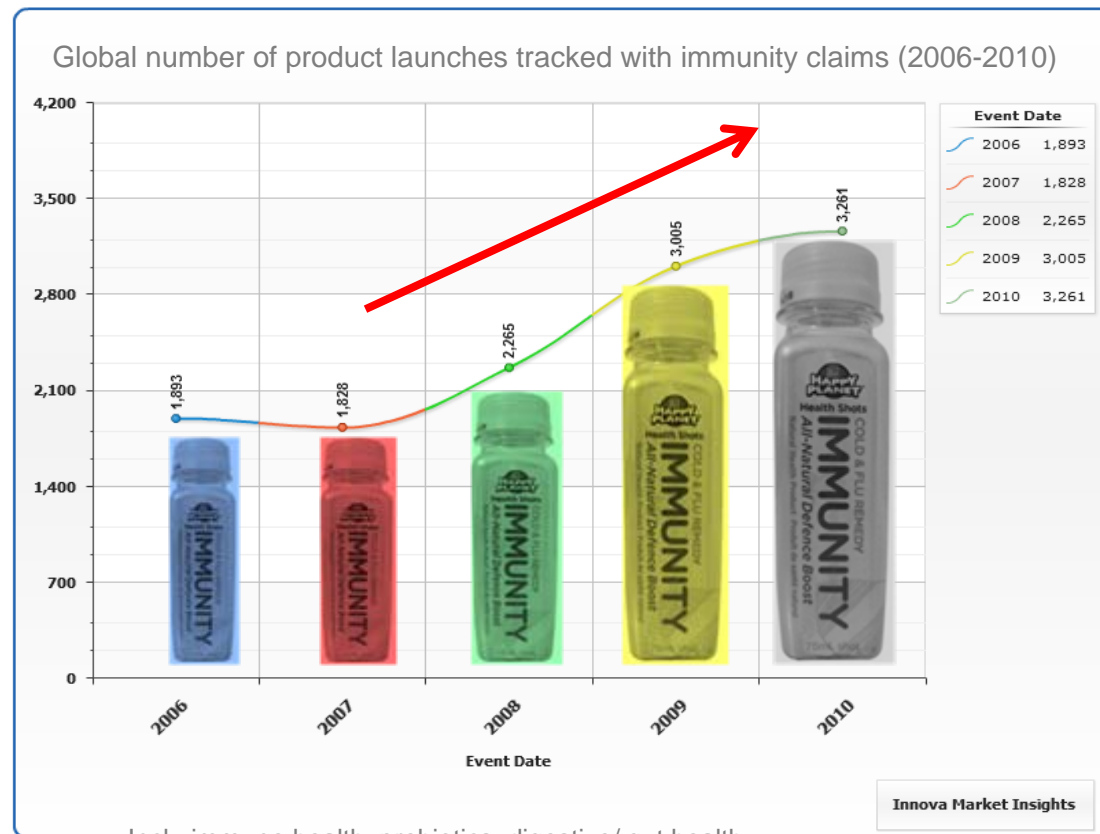
Made with tenderness in the North of Mexico. This is a 100% natural product

The agave cactus sap Villa de patos is naturally revitalizing, rich in antioxidants, vitamins, and minerals, and it also contains soluble prebiotic fibers.

The prebiotic fiber helps the gut flora development, improves digestion and the nutrients absorption, and it helps to strengthen the immune system. The agave cactus sap Villa de patos is sterilized through cold pasteurization unlike hot pasteurization, this innovating process guarantees the conservation of the flavor and of the valuable nutritional properties of the drinks. USDA organic.

Product launches

Even though there has been more stabilization in the last 2 years, there is still a big market and trend going on in this category. Despite the discussion on health claims and added healthy bacteria (prebiotics/probiotics), the number of new products is still growing.



Incl.: immune health, prebiotics, digestive/ gut health

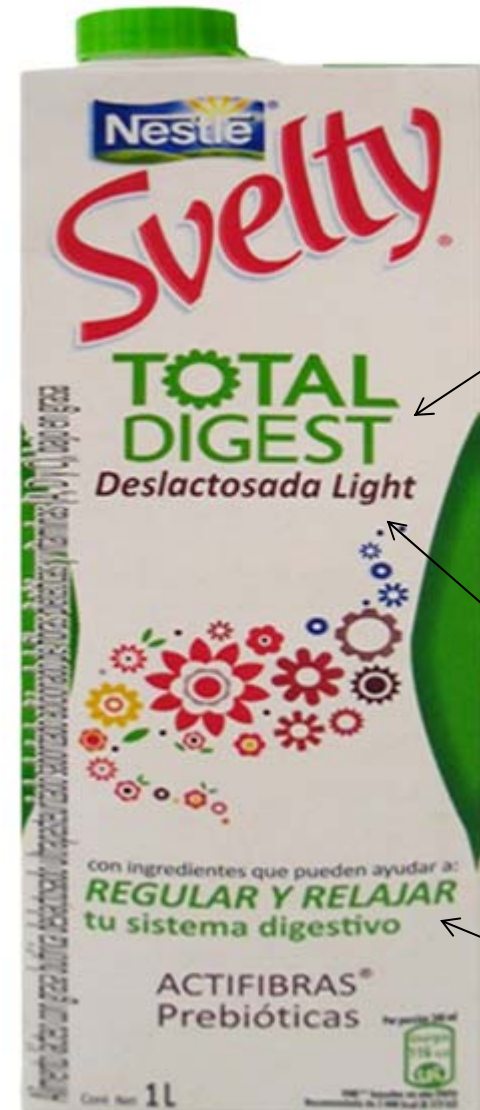
Excl.: Products categories: Baby Food, pet food, supplements

Compelling label statements



Australia: Vaalia Innergy Natural Probiotic Drink

Helps strengthen body's natural defenses. Contains probiotics. Nothing artificial. Gluten free. Low fat. Natural. Low GI. With LGG. Comes in a recyclable packaging. For healthy digestive system. Enhances immune defenses. For energy and vitality.



Mexico: Nestle Svelty Total Digest Light Milk

Lactose free light milk with special fiber to help the digestive system

Smoothies with immunity support claims

Regulatory hurdles may be stifling strong immunity claims for ingredients like probiotics, but research into their immunity boosting potential is ongoing.



USA: Stonyfield Organic Super Smoothie

Peach Flavor. Peach flavored organic low fat yogurt drink made **with probiotic cultures** that enhances digestive and immune system.



USA: Zola Immunity Smoothie

A blend of Brazilian Acerola Cherries, Camu Camu, and Acai, **contains loads of antioxidants, Vitamin C, and bioflavonoids** for some serious immune system support.



USA: Jamba Juice Company,

Jamba Juice Fruit and Yogurt blend **contains over 500 million active cultures per serving**, Jamba's Probiotic Fruit and Yogurt Blends offer customers a simple, delicious way to support immune system functioning and digestive health.

Front of pack information/ labeling is getting more important because of lack of knowledge by consumer

Governments and institutions are working first to improve consumer awareness with clear/ understandable 'on pack' information. On the other side, the companies are using their own symbols that explain the product's benefits.

Representing the Makers of the World's Favorite Food, Beverage and Consumer Products

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PER SERVING

450 CALORIES	5g SAT FAT 25% DV	360mg SODIUM 15% DV	14g SUGARS	500mg POTASSIUM 14% DV	3g FIBER 12% DV
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GMA Launches Front-of-Pack Labeling Initiative

America's food and beverage manufacturers and retailers have joined forces to develop and implement Nutrition Keys, an unprecedented voluntary front-of-pack nutrition labeling system to help busy consumers - especially parents - make informed decisions when they shop.

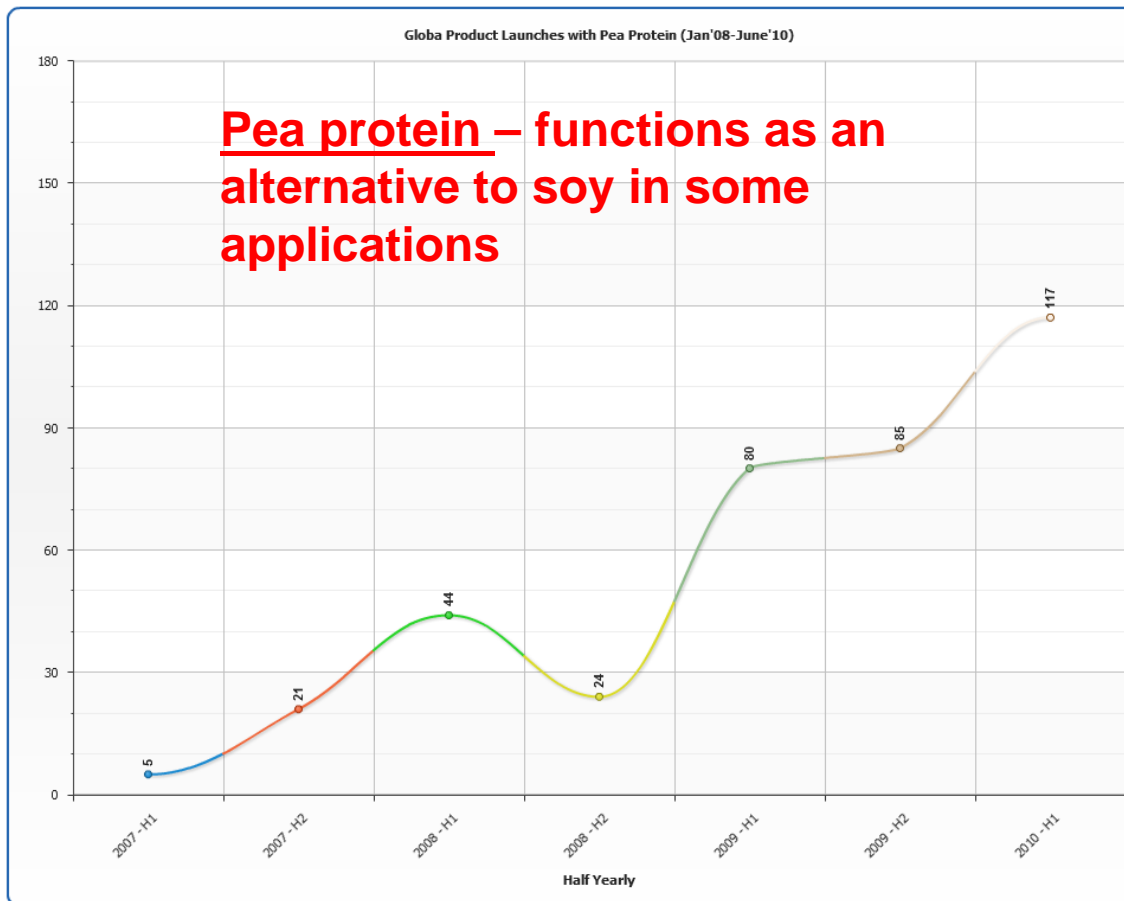




Trend 7: Alternative Protein Sources

Manufacturers look at alternative proteins

Manufacturers look to incorporate alternative proteins to fill the gap.



USA (2010), Contains pea protein



Innovations in meat added with alternative proteins

Meat manufacturers are combining meat with other protein sources to boost the health and sustainability image of their product

- **30% less fatt**
- **30 % less cholesterol**
- **For a balanced diet**
- **Made with addition of wheat proteins**

Germany: Vion Hackplus

The advertisement for Vion Hackplus features a green background. At the top left, the 'hackplus' logo is displayed in red and green, with a tagline '... für bewussten Genuss'. Below this is a photo of a smiling woman in a kitchen. To her right, a quote reads: '„Ich möchte meine Familie bewusst und ausgewogen ernähren. Deshalb entscheide ich mich für hackplus mit dem plus an wertvollem pflanzlichem Eiweiß. Mit hackplus koche ich unsere Hackfleischgerichte wie gewohnt und es schmeckt uns einfach gut!“'. On the right side, a package of 'hackplus' is shown, labeled 'NEU' (New) and 'Zubereitung aus HACKFLEISCH GEMISCHT plus pflanzliches Eiweiß'. A list of benefits is provided: '✓ 30% weniger Fett', '✓ 30% weniger Cholesterin', and '✓ plus wertvolles pflanzliches Eiweiß'. Below this, a testimonial states: 'Platz 1 im Geschmackstest* im Vergleich zu herkömmlichem Hackfleisch: bester Geschmack, beste Konsistenz, geringerer Bratverlust'. At the bottom right, three more packages of 'hackplus' are shown, and the Vion logo is visible.

hackplus
... für bewussten Genuss

Die Innovation bei SB-Frischfleisch

„Ich möchte meine Familie bewusst und ausgewogen ernähren. Deshalb entscheide ich mich für **hackplus** mit dem **plus** an wertvollem pflanzlichem Eiweiß. Mit **hackplus** koche ich unsere Hackfleischgerichte wie gewohnt und es schmeckt uns einfach gut!“

hackplus
Zubereitung aus HACKFLEISCH GEMISCHT plus pflanzliches Eiweiß
✓ 30% weniger Fett
✓ 30% weniger Cholesterin
✓ plus wertvolles pflanzliches Eiweiß
Ideal zum Braten und Garen

NEU

Innovativ, trendgerecht, umsatzstark

✓ 30% weniger Fett und Cholesterin **plus** wertvolles pflanzliches Eiweiß
✓ Platz 1 im Geschmackstest* im Vergleich zu herkömmlichem Hackfleisch: bester Geschmack, beste Konsistenz, geringerer Bratverlust
✓ Optimal für die stark wachsende Gruppe ernährungsbewusster Verbraucher

hackplus **hackplus** **hackplus**

VION
FOOD GROUP

A revolutionary minced meat product containing additional high quality vegetable protein. The combination of animal and vegetable protein in this form is promoted as an absolute innovation in the self-service meat segment. A totally new minced meat product has been created, containing 30% less fat and cholesterol but with exactly the same appearance, taste and preparation characteristics as conventional products.



Trend 8: Healthy Mind, Healthy Body

Managing lack of energy and brighten the mood

Products to boost the mood are on the rise, with ingredients like omega 3, ginkgo biloba, GABA and St. John's Wort, marketed from this regard. Products promoted to benefit relaxation or sleep, through the use of ingredients such as melatonin and valerian root, are still on trend.



Helps regular the sleep

Reboot Your Body

Guarana berries carry properties similar to caffeine that gives an energy boost while helping increase mental alertness.

Additionally, blueberries contain a lot of amino acids that help protect the body against the damaging effects of free radicals and chronic diseases.



The Netherlands:
V-Drink: the afternoon wake-up call

V's energy hit stimulates your mental and physical energy and provides you with the ammunition and enthusiasm to put a spin on your every day. With Guarana berries and B vitamins.



USA:
Rebootizer: the ultimate copa (the anti- hangover Shaker)

Rebootizer is an alcohol-free digestive drink made of 100% natural plant and fruit extracts (ricolice, dandelion, melissa, artichoke, lemon, blueberry) that helps quickly break down toxins in the body resulting from eating or drinking.



Trend 9: Fibre Triumphs on Gut Feeling

High in fibre

Simple and easily understood “high fibre” claims are welcome.



Canada: Delicious toasted wholegrain cereal squares with mixed berry flavored crunchy granola clusters. The cereal is low in fat, saturated fat and sodium. It contains 40% of the recommended daily fiber per 54g serving. It's trans fat free, **very high in fiber and a source of 8 essential nutrients.**



Brazil: Danone
Densia
Fermented
Skimmed Milk
Drink with Oats



Well-Established Gluten Free Products

Gluten free launches are rapidly increasing in recent days where the prevalence of gluten intolerant are increasing.



Australia: Back to Nature Waffle Bitez Crispy Corn & Maple Flavoured Cereal.
Gluten free. Wheat free. 99% fat free. No preservatives. No artificial colorings or flavorings.



Brazil: Delicias de Sao Conrado Pan de Queso: Cheese Bread. Gluten free

Rising Ancient Grain Launches

Innovative recent launches indicate a strong future for fiber.

Ancient grains find applications in products marketed



*Argentina: Ten individually wrapped wafers filled with nougat and peanuts, in a 250g plastic bag. Contains gluten, **durum wheat**, peanuts, and soybean.*



*United States: Nature's Path Organic Heritage Whole Grains Cereal. Organic heritage wholegrain cereal with Kamut khorasan wheat, wheat, oats, spelt, barley, millet, and quinoa. **Ancient grain cereal..***

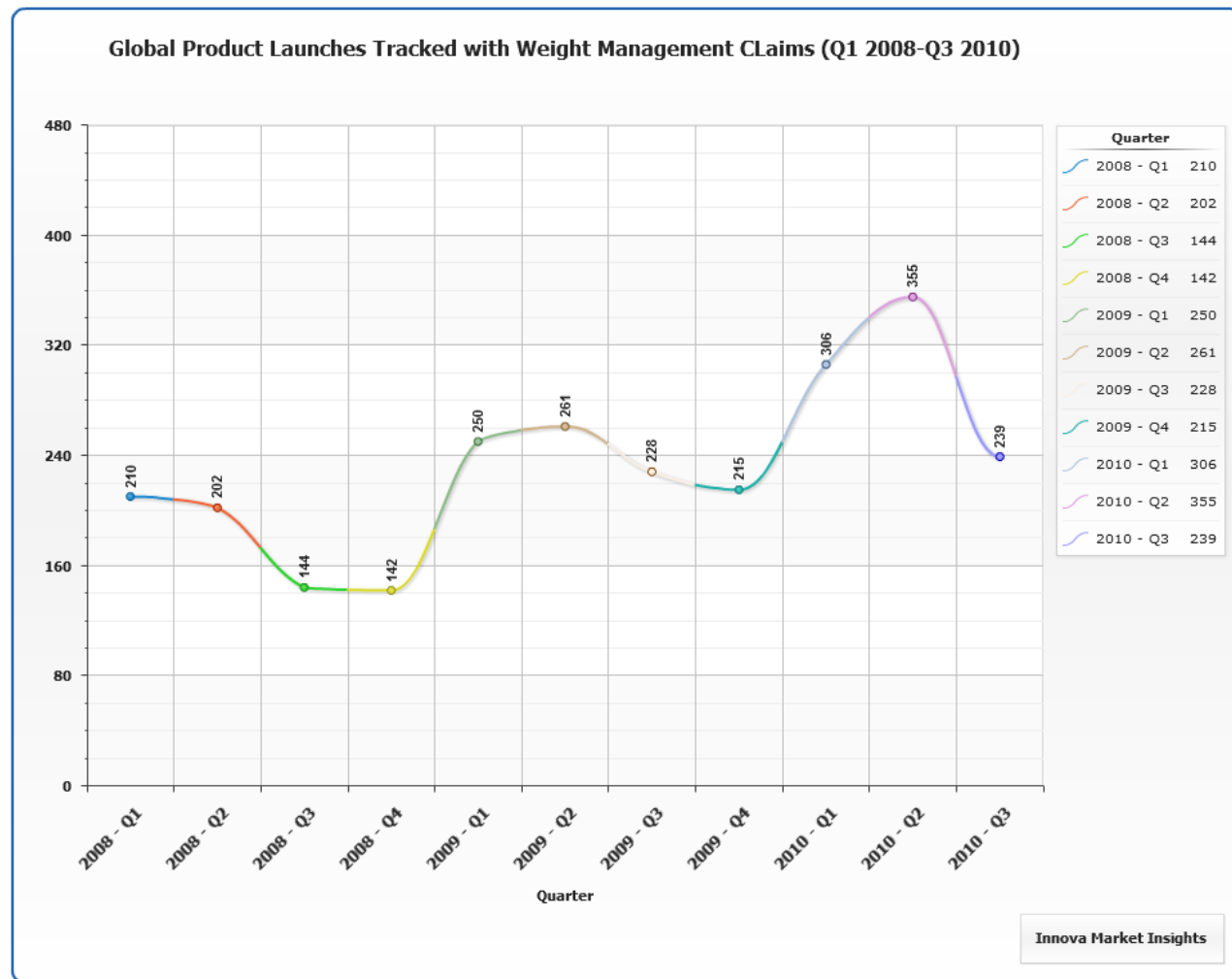




Trend 10: Out of the Box Weight Loss

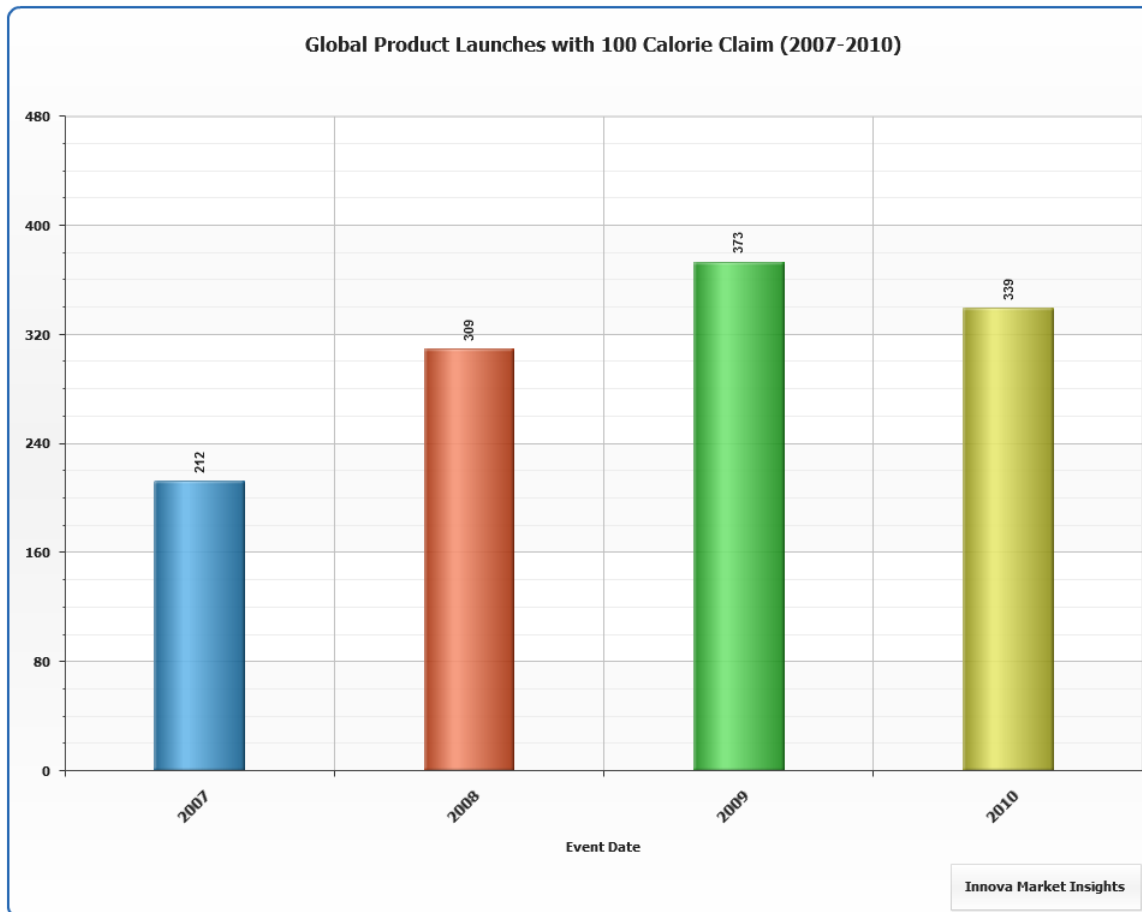
Increase in product launches with weight management claims

There is a steady growth in the launch of products with a weight management claim. The highest activity occurring in the first part of the year – the time of year that coincides with New Year's resolution.



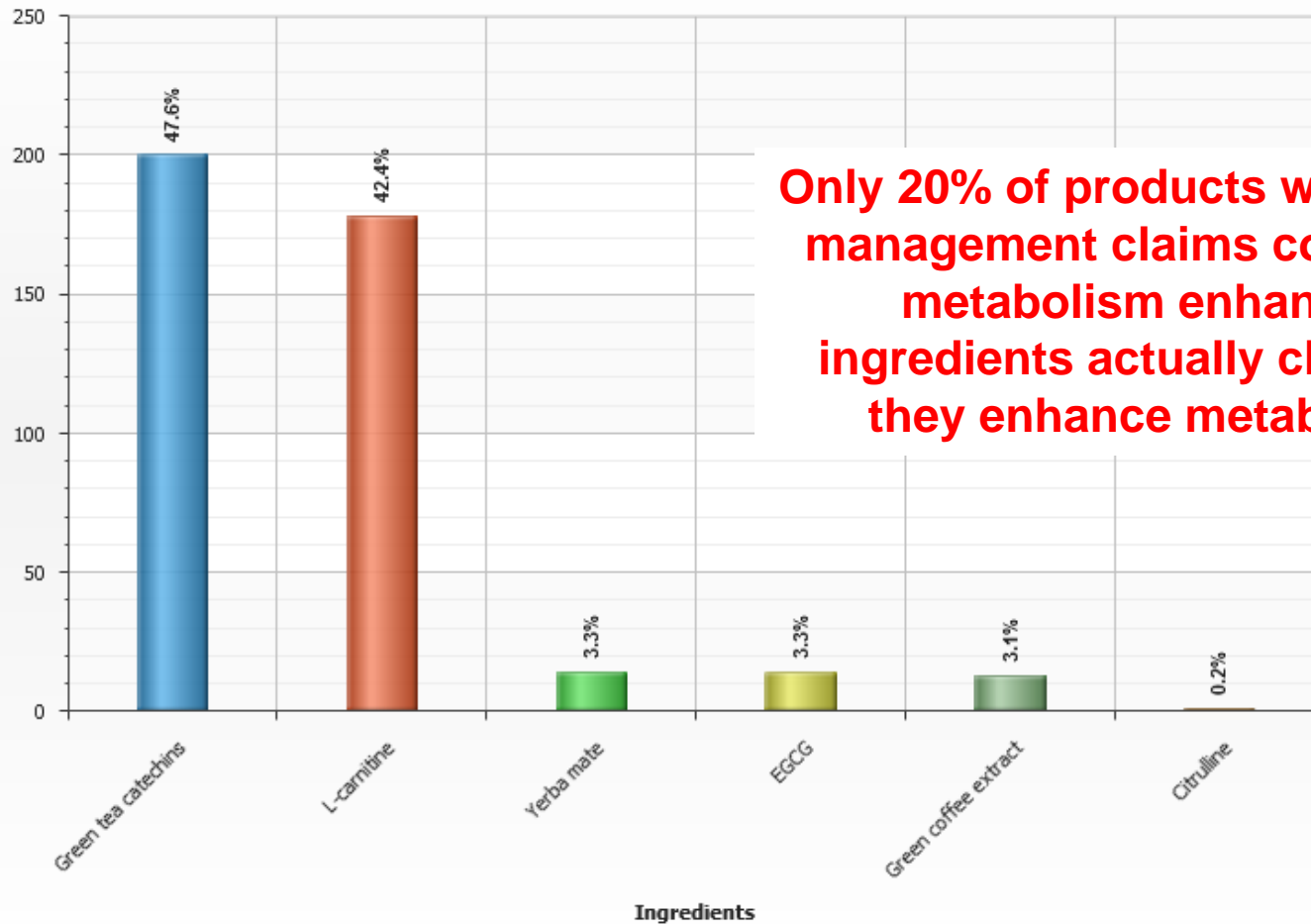
Calorie control

The 100 calorie snack trend was by no means a fad; there are still many products being launched along these lines, particularly in the USA.



Increasing metabolism for weight management

Enhancing Metabolism Ingredients Driving Weight Management (2002-2009)



Only 20% of products with weight management claims containing metabolism enhancing ingredients actually claim that they enhance metabolism

Ingredients driving metabolism claims



Hungary: Nestea Enviga,

*Still calorie burner **green iced tea** with forest fruit flavor. Helps to speed up the metabolism. It is refreshing sparkling green tea that invigorates the metabolism to gently increase calorie burning.*



*USA: Nutra-Trim Berry Gum, weight management chewing gum with **green tea, L-carnitine, and chromium**. Increases metabolism and helps control cravings.*



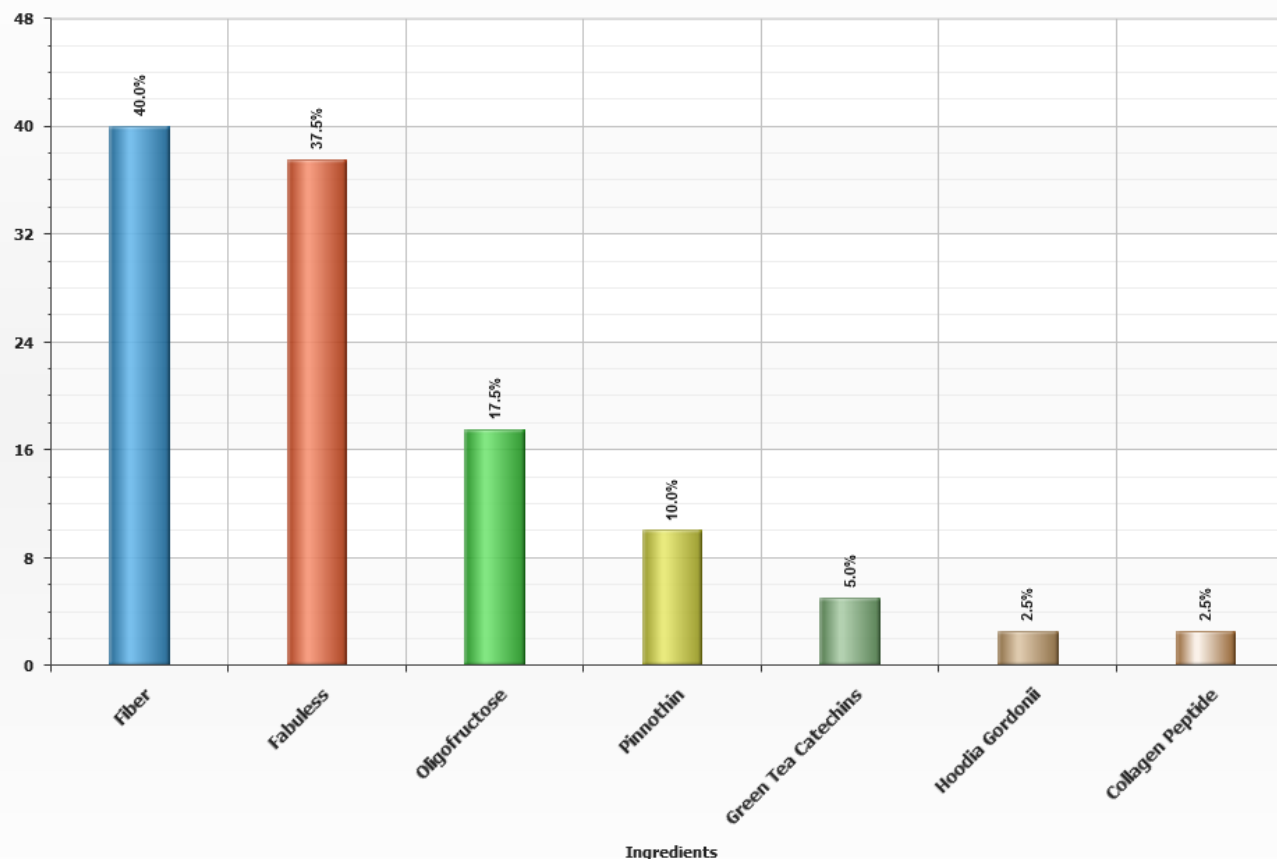
Japan: Asahi Soft Drinks/Shiseido Pharmaceuticals launched a new product featuring the ingredient citrulline.

Citrulline works as an antioxidant, reduces the build-up of ammonia in the bloodstream, dilates blood vessels, it prevents muscle fatigue and it boosts metabolism.



Satiety for weight management

Ingredients Driving Satiety Claims for Weight Management Products (Global Launches Tracked, 2008-2010)



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Ingredients driving satiety claims



USA: **FABULESS:** Eating Right Uniting Flavor & Nutrition Appetite Control Peach Passion Smoothie. **Contains a natural food ingredient (Fabulesse) that may help to reduce food intake.**



Bulgaria: **INULIN:** Alpi Slimbo Sugar Free Toffees with Inulin. Contains inulin that stimulates metabolism and has a favorable effect on the intestinal microflora, naturally decreases the sense of hunger.



USA: **FIBER+PROTEIN:** Crystal Light On the Go Hunger Satisfaction Natural Strawberry Banana Drink Mix. With 5g fiber and 3g protein to help satisfy hunger.



UK: **PINNOTHIN:** Ador Dark Chocolate & Mint Bar with PinnoThin. A bar of finest Swiss dark chocolate with mint and the natural ingredient PinnoThin which **keeps you feeling fuller for longer.**

Glucomannan in Snacks for Satiety



Spain: Launched in (2008): Special Line Snacks

Claim: Special Line, satisfying snacks. With a high fibre content

Ingredient extract: dietary fiber (11.3%) (oligofructose, orange fiber, fiber, pea fiber, glucomannan)

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1

"El Top Ten en Tendencias de Salud y Bienestar"

2

"Hacia una nutrición 2020 saludable"

3

"Tendencias en Marketing de Alimentos y Bebidas"

4

"Investigación y Desarrollo:
desafíos en la creación de nuevos productos"