Blurring the Line Between Food Trend and Fad

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Follow the Macro Forces:
Understanding the Consumer-Driven Shifts in Food & Beverage

Blurring the Line Between Food Trend and Fad, SSW/FiNA 2019

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New Hope Network is part of Informa’s Health & Nutrition Group

Our mission is to help mission-driven CPG brands **bring more health to more people** through:

- **Health & Wellness**: our aim is to nourish people, businesses, economies and the planet
- **Innovation for Good**: we devote significant time and resources toward championing research, science and what’s next in the industry.
- **Stewardship**: we take our responsibility for leading the industry – and the future of optimal health for people and the planet we inhabit - very seriously.
- **Partnership**: at all levels of our eco-system we foster connections and facilitate collaboration.
Setting the Market Context
We are approaching $250 billion in sales

U.S. natural and organic products industry grew 6.5% to $219B in 2018

F&B drives 70% of sales

Source: Nutrition Business Journal ($mil, consumer sales) estimates, powered by SPINS
Food & beverage dominate industry sales

Natural, organic and functional F&B grew 6.6% to $152B in 2018;

Source: Nutrition Business Journal ($mil, consumer sales) estimates, powered by SPINS
N, O & functional fueling all F&B growth

Natural, organic & functional F&B grows 7.3% while conventional drops 0.2%

Source: Nutrition Business Journal ($mil, consumer sales) estimates, powered by SPINS
Consumers seek functionality in F&B

Functional food & beverage sales grew 6.6% to $68B in ’18

Top growth categories
- Beverages
- Snacks

Hot functional ingredients:
- Collagen
- Mushrooms
- Adaptogens
- Probiotics
- Healthy Fats
- Hemp CBD

Source: Nutrition Business Journal (Smil, consumer sales) estimates, powered by SPINS
Food & beverage trends we will be focused on today

• Gluten Free
• Paleo
• Vegan
• Keto
• Low FODMAP
Food & beverage trends we will be focused on today:

- Gluten Free
- Paleo
- Vegan
- Keto
- Low FODMAP

Succeeding with these trends and understanding what’s coming next requires seeing and understanding the bigger market picture...
These products embody three characteristics

1. TARGET A DESIRABLE SOURCE OF VOLUME
   - RXBAR
     - $151mm | +28%
   - Kodiak Cakes
     - $118mm | +89%
   - Ancient Nutrition
     - $31mm | +42%

2. ADDRESS UNMET CONSUMER NEED
   - Caulipower
     - $100mm | +232%
   - Ripple
     - $38mm | +31%
   - Siete
     - $39mm | +119%
   - Spindrift
     - $33mm | +131%
   - Banza
     - $20mm | +77%

Source: SPINSscan Natural and Specialty Gourmet (proprietary), Conventional Multi Outlet (powered by IRI), 52 weeks ending 8/11/19. UPC coded items only.
Tracking the Macro Forces changing food

Holistic Health & Wellbeing
- Plant Wisdom
- Protein Power
- Ancient Wisdom
- Discovering Ailment Triggers
- The World is Fat

Empowered Communities
- Material Optimization
- Inventive Business Models
- Agricultural Commitments
- Energy Commitments
- Social Impact Commitments
- Earning Consumer Trust

Modern Life
- Modern Conditions
- A Life of Vitality
- Coping with Chaos
- Experiential Experimentation
- Power of Science
People are paying more attention than ever to what it takes to live a healthy life. They are reading labels, experimenting with new diets and educating themselves about nutrition. Today’s consumers want products that support and strengthen the body’s mechanisms to live a life of holistic health and vitality.
Consumers are fed up with over-processed foods and are relying on the intelligence of nature and past cultures to inform dietary choices from ingredient formulations to processing techniques. The result is cleaner label offerings in every CPG product category.
From providing creative and increasingly delicious (while not always “healthy”) alternatives to traditional meat, dairy and seafood products to fortifying snacks and other packaged foods with inherently functional nutrient-density, plants are redefining our food and CPG systems.

Plant Wisdom

**GOOD CATCH**
Trend: Plant-based Ethics
Innovation: Legume-based seafood alternative

**LE GRAND**
Trend: Plant-based Ethics
Innovation: Organic plant-based cheese spread

**ELMHURST MILKED**
Trend: Plant-based Ethics
Innovation: Hemp-based dairy alternative

**RIOT EATS**
Trend: Plant-based Ethics
Innovation: Organic, soy-free dairy alternative
Whether they really need it or not, many consumers are seeking more protein in their diets, at every consumption occasion and in higher gram formulations. A growing number of people are also looking for brands that differentiate via responsible sourcing practices or plant-based protein options.

**Protein Power**

**READY NUTRITION**
- Trend: More Protein Please
- Innovation: Clean Protein

**VITAL PROTEINS**
- Trend: Responsible Meat & Dairy
- Innovation: Grass Fed

**CLEAN MACHINE**
- Trend: Plant Protein
- Innovation: Water Lentils / Lentein

**CAULIPOWER**
- Trend: Eat More Plants
- Innovation: Cauliflower-coated chicken tenders
Modern diets are responsible for many health issues and consumers are experiencing an array of afflictions, taking them down a path of discovery as they work to take control of their health and replace “problem” foods with new healthy and delicious alternatives.

Discovering Ailment Triggers

**Macro Force**

**Holistic Health & Wellbeing Cultural Force**

**TIGER BUTTER**
- Trend: Allergens & Intolerances
- Innovation: Root Vegetable Nut Butter

**CYBELE’S FREE TO EAT**
- Trend: Novel Alternatives
- Innovation: Legume & Veggie Pasta

**FODY**
- Trend: Allergens & Intolerances
- Innovation: Low FODMAP

**BASE CULTURE**
- Trend: Additives Free
- Innovation: Pure Paleo food
Food can either fortify and heal us or it can harm us. Brands are finding creative ways to respond to changing consumer perceptions around nutrition, including the growing appreciation for healthy fats and understanding that sugar isn’t at all sweet when it comes to health.
Modern life can take a toll, and consumers are looking to modern solutions, such as the latest technological advancements, to churn out innovative products that improve their lives and help them thrive in today’s busy world.
A Life of Vitality

The pressure of modern life can take a real toll on our health and vitality. To cope, consumers seek special diets and nutrition products to help stave off and prevent disease, treat conditions, and optimize how they feel today and every day.

**GOODWOLF**
- **Trend:** Healthy Microbiome
- **Innovation:** Water kefir (raw, living probiotic beverage)

**EGGLIFE**
- **Trend:** Optimized Diets
- **Innovation:** Paleo egg white wraps

**HU KITCHEN**
- **Trend:** Optimized Diets
- **Innovation:** Gluten- and dairy-free, optimized for vegan and paleo diets

**WINGED**
- **Trend:** Endocannabinoid System
- **Innovation:** CBD line formulated for women (stress, sleep, mood)
Coping with Chaos

Brands are finding new ways to cater to the time-starved consumer with new convenient formats, and in many instances with a healthy dose of super nourishing ingredients.

OATS OVERNIGHT

Trend: Convenience
Innovation: On-The-Go

NATURALLY CLEAN EATS

Trend: Nutrition Meets Convenience
Innovation: Gluten-Free, Hidden Veggies

SKINNY SOUPING

Trend: Nutrition Meets Convenience
Innovation: Functional Consumption On-The-Go

GOOD FOOD FOR GOOD

Trend: Quick Scratch Cooking
Innovation: Date-Sweetened, Keto, Dairy Free
Frustrated with corporate apathy and government inaction, consumers are shifting their purchasing behaviors to support businesses that are solving for environmental, social and nutritional health issues affecting communities near and far.
Earning Consumer Trust

As information about our food system becomes ubiquitous, opaque conventional food systems and practices are eroding consumer trust. Challenger brands are responding by pulling the levers of transparency, traceability and product verification.

**PRESSERY**
- Trend: Transparency
- Innovation: Local sourcing / Re-purposed waste stream

**MADE OF**
- Trend: Verification
- Innovation: B Corp, label transparency

**NUTRI-RICH**
- Trend: Traceability
- Innovation: Tracking system

**MANITOBA HARVEST**
- Trend: Organic
- Innovation: Certified Organic hemp
Investing in sustainable packaging innovation is finally gaining steam in the CPG industry, and natural & organic brands are tapping into their parent company’s or investors’ coffers or joining forces to move the needle on compostable and more eco-friendly packaging.

### Wildscape
- Trend: Responsible Packaging
- Innovation: Reusable packaging

### Loving Earth
- Trend: Responsible Packaging
- Innovation: Compostable packaging

### Alter Eco
- Trend: Responsible Packaging
- Innovation: Compostable packaging

### Loop
- Trend: Responsible Packaging
- Innovation: Reusable packaging
Organic gives an edge to innovation

Innovation is alive and well in the food and beverage industry, and some of the best innovators are ensuring that their products are certified organic, providing an edge over the competition and demonstrate that it is possible to create cutting-edge products that are organic and even regenerative.

**88 ACRES**

**LIFEWAY FOODS**

**LILLY’S**

**MAPLE HILL CREAMERY**
Thank you

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Blurring the lines between a trend and a fad

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Mintel Ltd.
Our toolbox

**TRENDS**
Mintel is a world leader in trend spotting and market predictions with observers and analysts in 20 countries.

**CONSUMERS**
Mintel conducts primary research with 40,000 consumers around the world every month.

**ANALYSTS**
Mintel has 200 global category, consumer and functional analysts.

**PRODUCTS**
Mintel purchases 1,500 new products, in 62 countries, every day.

**MENU INSIGHTS**
Mintel collects thousands of US menus every year to track trends in the menu optimization, flavors, ingredients and preparation.

**CONSULTING**
Mintel strategists provide custom problem solving and actionable advisory.
What “health & wellness” is has changed in the US market

<table>
<thead>
<tr>
<th>Motivation</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>General wellbeing</td>
<td>62%</td>
</tr>
<tr>
<td>Feeling good about myself</td>
<td>58%</td>
</tr>
<tr>
<td>Losing weight</td>
<td>47%</td>
</tr>
<tr>
<td>Maintaining weight</td>
<td>45%</td>
</tr>
<tr>
<td>Preventing disease/illness</td>
<td>45%</td>
</tr>
<tr>
<td>Boosting energy</td>
<td>37%</td>
</tr>
<tr>
<td>Managing disease/illness</td>
<td>24%</td>
</tr>
<tr>
<td>Gaining weight</td>
<td>12%</td>
</tr>
</tbody>
</table>

Source: Mintel/Lightspeed
"Better for you" is about wholesomeness

Attributes of healthy vs. unhealthy foods, 2017

- Natural: 63% consider healthy, 7% unhealthy
- Freshly made: 60% consider healthy, 5% unhealthy
- Organic: 47% consider healthy, 6% unhealthy
- Preservative-free: 46% consider healthy, 5% unhealthy
- Pesticide-free: 40% consider healthy, 4% unhealthy
- Few ingredients: 39% consider healthy, 5% unhealthy
- Antibiotic-free: 36% consider healthy, 3% unhealthy
- Local: 28% consider healthy, 4% unhealthy
- Sustainable: 18% consider healthy, 5% unhealthy
- GMO ingredients: 35% consider unhealthy, 8% healthy
- Non-perishable: 15% consider unhealthy, 5% healthy
- Artificial ingredients: 5% consider unhealthy, 5% healthy

Base: 2,000 internet users aged 18+

Source: Mintel/Lightspeed
Weight management influences dietary choices

80% of US adults are currently managing their weight; the majority focusing on weight loss.

120M adults trying to lose weight, 71.5m maintaining, 12.8m gaining.

40% of US adults are obese (BMI of 30 or above).

Base: 2,000 internet users aged 18+
Source: Lightspeed/Mintel
Consumers look for more info—from the package

**US: packaging-related behaviors and attitudes by demographic, Mar 2017**

- **Brands should include more health information on pack**
- **Would like to access additional nutrition/ingredient information digitally**
- **I have scanned codes on packaging to get more information**
- **I've found helpful information by scanning a QR code**

Source: Mintel/Lightspeed
What consumers want goes across diet plans

LIMITING SUGAR

74%

of US consumers agree a healthy diet should be low in sugar

DIET BY DNA

31%

of US consumers would be interested in a personalized diet based on their DNA

CUSTOMIZE IT

70%

of US consumers who are managing their weight claim to follow their own eating program/guidelines

Source: Lightspeed/Mintel
Americans are predominantly omnivores

Omnivores state more than anything this type of diet is easy to follow, while the top reason to follow these other diets is "makes me feel good."

US: Typical diet consumed

<table>
<thead>
<tr>
<th>Diet</th>
<th>% of Consumers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Omnivore</td>
<td>64%</td>
</tr>
<tr>
<td>Paleo diet</td>
<td>12%</td>
</tr>
<tr>
<td>Vegetarian</td>
<td>6%</td>
</tr>
<tr>
<td>Pescatarian</td>
<td>4%</td>
</tr>
<tr>
<td>Vegan</td>
<td>2%</td>
</tr>
</tbody>
</table>

Base: 2,000 US internet users aged 18+
Source: Lightspeed/Mintel
Understanding the difference between a trend and a fad

What constitutes a trend

- Shows slow, steady growth over time, gradual decline of new items
- Applicable over various categories
- Versatile
-Expands countries
-Uses a common language or easily becomes part of the vernacular
-Easy for consumers, restaurants, and retail to adopt
-Possesses an “a-ha” or “mmm” factor
-Usually timeless, or at least works over a long time period
Understanding the difference between a trend and a fad

What constitutes a fad

- Appears quickly, grows quickly, disappears quickly
- Appears in a limited categories
- Expands into few additional countries
- Explanations confusing or contradictory
- Difficult for consumers, restaurants, or retail to adopt
- Possesses an “a-ha” factor
- Usually defined by a time period, often relatively short
What it seems like consumers think of these four diets

<table>
<thead>
<tr>
<th>Diet</th>
<th>Consumer Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gluten free</td>
<td>Consumers looking for no wheat (and often no GMOs), with a promise of weight loss and fewer gastro issues.</td>
</tr>
<tr>
<td>Keto</td>
<td>Consumers looking for low-sugar options, with a promise of weight loss and overall health.</td>
</tr>
<tr>
<td>Vegan</td>
<td>Consumers looking for animal-free options, and a promise of overall health of self and planet.</td>
</tr>
<tr>
<td>FODMAP</td>
<td>Very few consumers, looking for &quot;no bad stuff&quot; that they may not completely understand, with a promise of fewer gastro issues.</td>
</tr>
</tbody>
</table>
Gluten free claims appear on about 30% of new product introductions, while vegan has grown the most over time. Both keto and FODMAP show very few introductions.

Source: Mintel GNPD
<table>
<thead>
<tr>
<th>Segment</th>
<th>Percentage</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumers 31-40</td>
<td>44%</td>
<td>Say they would buy gluten free, compared to 34% for all consumers</td>
</tr>
<tr>
<td>Higher Income Groups</td>
<td>39%</td>
<td>Of consumers with incomes ranging from $75K-$150K say they would buy gluten free</td>
</tr>
<tr>
<td>Whole Foods Shoppers</td>
<td>48%</td>
<td>Of consumers who primarily shop at Whole Foods say they would buy gluten free</td>
</tr>
</tbody>
</table>

Source: Mintel Purchase Intelligence
Consumers choose gluten free for a range of reasons

**Why do, or did, you eat gluten-free foods? Please select all that apply.**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>It's better for my overall health</td>
<td>44%</td>
</tr>
<tr>
<td>For weight loss</td>
<td>26%</td>
</tr>
<tr>
<td>Someone I know is/was eating gluten-free foods</td>
<td>25%</td>
</tr>
<tr>
<td>To manage gastrointestinal symptoms</td>
<td>24%</td>
</tr>
<tr>
<td>For more energy</td>
<td>23%</td>
</tr>
<tr>
<td>To reduce inflammation or joint pain</td>
<td>23%</td>
</tr>
<tr>
<td>A healthcare professional suggested I eliminate gluten</td>
<td>18%</td>
</tr>
<tr>
<td>To stabilize my mood</td>
<td>13%</td>
</tr>
</tbody>
</table>

*Base: 537 internet users aged 18+ who eat gluten-free foods or used to eat gluten-free foods

*Source: Lightspeed/Mintel*
Gluten free claims appear almost everywhere

- Aldi’s Never Any! Sausages, with “no bad stuff”
- Daiya Deluxe Cheezy Mac, dairy, gluten, and soy free
- Apple & Eve Cool Waters juice drinks (gluten free?)
What’s behind vegan? Plant-based foods

Attitudes about plant-based proteins, US, 2019

- Plant-based proteins are healthy
- I have noticed more plant-based options in the grocery store
- Plant-based foods are more expensive than other foods
- Plant-based foods are better for the environment than animal-based options
- Plant-based products (e.g., soy milk, almond milk) need a greater variety of flavors
- Plant-based proteins are better for you than animal-based proteins
- I trust the functional claims made by plant-based foods

Source: Mintel/Lightspeed
Vegan claims link to plant-based statements

Califa Farms Nitro Draft Latte, made with almond milk

Safeway’s O Organics Plant Based Burger Patties (soy based)

Tattooed Chef Zucchini & Yellow Squash Spirals (vegan, of course)
Keto: Consumers follow it, even if they call it something else

Scientific evidence supporting the long-term effectiveness of the keto diet is limited. Some research suggests that any weight loss results of low-carb diets is due to increased satiety and reduced calorie intake.

24% of UK consumers aged 25-34 years follow a high-protein, low-carb diet.

Base: UK: 2,000 internet users aged 16+
Source: Lightspeed/Mintel
Many keto products focus on physical and mental boosts

The keto diet has evolved beyond just another high-protein diet into a trendy lifestyle choice. The war on sugar is creating new opportunities for low-carb dietary approaches.
Most FODMAP products appear in Australia

Most product introductions with a FODMAP claim appear in Asia Pacific, specifically Australia, where FODMAP got its start. While North American introductions have increased, they still make up a tiny percentage of all introductions.

Source: Mintel GNPD
Consumers don’t understand what FODMAP is

“I'd want to look into what fodmap is first. Find out why it is special.” – Female, 18-34, Northeast

Source: Mintel Purchase Intelligence
Many ingredients suitable for FODMAP and gluten free diets

- FODMAP Friendly fibers
- Nuts, seeds, and gluten-free grains add fiber
- Low calorie konjac flour adds fiber to pasta
## Trend or fad?

<table>
<thead>
<tr>
<th>Gluten free</th>
<th>Keto</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Trend</strong>: Although new product introductions are beginning to level, gluten-free eating offers benefits to those with sensitivities and beyond.</td>
<td><strong>Fad</strong>: Likely will go the way of Atkins (not gone, but not significant), and will continue to morph into a stronger focus on sugar.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vegan</th>
<th>FODMAP</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Trend</strong>: Younger consumers will drive this eating and lifestyle plan, with it potentially becoming the go-to for those most focused on environmental issues.</td>
<td><strong>Fad</strong>: Too difficult to understand; will eventually roll up into gluten-free (although it is not exactly the same).</td>
</tr>
</tbody>
</table>
What to take away from all this data

Benefits not names

Digestive issues, sugar reduction, weight management: Any of these products should focus on these benefits rather than the trendy diet names. The trendy diet may evaporate, but the benefit will still be important.

Educate, educate, educate

Consumers don’t properly understand the benefits of these diet plans, or of the beneficial ingredients that drive them. YOU know! Tell them!

Don’t forget what’s important

It’s one simple thing . . . .
Food must taste good!

Which of the following are important to you when choosing which food/drinks to buy? Please select all that apply.

- Tastes good: 87%
- Fresh: 68%
- Nutritious: 65%
- Fits my budget: 62%
- High quality ingredients: 57%
- Easy to prepare: 51%
- Convenient: 47%
- Filling: 36%

Base: 1,941 internet users aged 18+ who are responsible for food/drink shopping

Source: Lightspeed/Mintel
Meet the Expert

Lynn Dornblaser
Director, Innovation & Insight
lynnd@mintel.com

The world’s leading market intelligence agency
Our expert analysis of the highest quality data and market research will help you grow your business.
Blurring The Line Between Food Trend and Fad
Formulating Considerations and Ingredient Selection for Gluten Free, Keto, Vegan and FODMAP diets
Consumers all want that holy grail for each dietary trend...

- I want gluten-free snacks that taste great, has a 9-month shelf life and good for my kids who have food allergies.

- I want snacks that are extremely high in fat, high in protein and extremely low in carbs so I can maintain my KETO diet while on the go.
Consumers all want that holy grail for each dietary trend…

- I want hamburgers made from plants and milk made from pea protein.
- I want to eat foods that won’t aggravate my gut—no IMOs and no sugar alcohol.
Managing dietary lifestyles at home is easy (if you like to cook) but what about on the go? This is where shelf-stable processed products that meet those dietary needs come in!
They want products in their dietary space that are easy to buy, eat and take with them on the go …

- Ready-to-eat snacks
- Frozen meals that hit the right dietary profiles
- Open and serve refrigerated products like puddings, beverages, dry mixes
- Thaw and cook items
- Alternatives to what they are not allowed to have but with adjusted ingredients so they CAN have it
- Shelf-stable on-the-go items
Food Scientist Challenge …

- Hitting the precise macronutrients as defined by the entrepreneur and/or marketing team selling the item
  - The definition may vary within the same dietary plan
- Functionality, making sure the product “works” like its original counterparts on the market
- Great taste – so they can’t “taste the difference”
- Long shelf life
The Keto Diet!

- High in Fat (70% of calories from “high-quality” fat)
  - High-quality fat including MCT’s, coconut oil, cheese)
  - Saturated fat is OK!

- Very low in Carbs
  - Not zero carbs, fibrous carbs are OK, mostly leafy green vegetables

- Moderate Protein (there needs to be room for all that fat!)
  - Keto diet is not a “high-protein” diet like Atkins
  - 10% to 30% protein depending on activity level
Staying Within Certification Guidelines

- There are no FDA or USDA sanctioned certifications for Keto, but there are some private ones that brand owners use as a guide to provide to the food scientist/developer.
  - **Ketogenic.com**: They actually test the product to ensure it does not spike blood sugar or knock user out of ketosis.
# Formulating For Keto

## Qualifications

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Ketogenic Friendly</th>
<th>Ketogenic Certified</th>
<th>Ketogenic Certified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Added Sugars*</td>
<td>&lt;4g</td>
<td>&lt;2g</td>
<td>&lt;2g</td>
</tr>
<tr>
<td>Total Sugar Alcohols**</td>
<td>&lt;20g</td>
<td>&lt;15g</td>
<td>&lt;15g</td>
</tr>
<tr>
<td>Total BHB in Exogenous Ketones</td>
<td>&gt;3g</td>
<td>&gt;5g</td>
<td>&gt;5g</td>
</tr>
<tr>
<td>Artificial Sweeteners Allowed?</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Vegetable Oil Allowed?</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Requires a 1:1 Ratio***</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Ketogenic Index</td>
<td>±20%</td>
<td>±10%</td>
<td>±10%</td>
</tr>
</tbody>
</table>

All values are based on a single serving size. The Ketogenic Index is based on statistical analysis of blood glucose and ketone levels.

*Excludes allulose ** Excludes high GI sugar alcohols *** Ratio = fat : net carbs + protein
Keto Ingredient Selection General Rules

- Keep the ingredients as natural as possible
- Only use ingredients that contribute minimal amounts of natural carbohydrates that are ideally not sugar carbs and ideally fibrous ones
- Any ingredient that can provide bulk and sweetness that we don’t really digest or won’t count towards net carbs—including fibers, sugar alcohols, allulose
- “Clean” fats like olive oil, MCT, coconut oil and sustainably sourced palm
- Get lots of water and air in the product (ice cream/frozen desserts)
Acceptable Ingredient Choices for Keto Formulations

- **Nut Flours**
  - Low in carb, high in fat and protein

- **Egg Products**
  - Provide thickness, texture, aeration, all protein

- **Gums like Guar, Xanthan**
  - Texture, binding adheriveness, used in tiny amounts, no calories

- **Soluble Fibers**
  - Add bulk, but not digestible carbs

- **Sugar Alcohol (Erythritol)**
  - Water activity reduction, bulk, taste, not digestible

- **Allulose**
  - Water activity reduction, bulk, taste, not digestible

- **Fats**
  - Sustainable Palm, Coconut, Olive

- **Pressed Nut, Plant, Seed flours**
  - Peanut flour (high in protein, lower in fat)
  - Almond protein powder
  - Pressed bean flour

- **Protein Isolates (90% protein and above)**

- **Corn Starch free Baking Powder**

- **Fat “ Powders”**
  - Fat plated on soluble fiber

- **Coconut Flour**
  - Minimal carbs, bulk, texture, protein
NOT Acceptable Ingredient Choices for Keto Formulations

- Any flour made up of carbohydrates (even if gluten free)
  - Rice flour
  - Tapioca
  - Potato Starch
- Starches
  - Corn Starch, Tapioca Starch, Any Starch
- Inulin and/or Oligo-saccharides
  - FDA says they have more digestible carbs than previously thought
- Sugar Alcohol Maltitol/Sorbitol/Maltitol
  - They are known to have metabolic impact
- Any kind of sugar, honey, rice syrups, tapioca syrups, molasses, sorghum syrups
  - Has carbs!

- Fats
  - No soy, canola or oil blends
- Plant carbohydrates
  - Beans in general (have too many carbs)
- Protein Concentrates
  - Too many carbs
- Corn Starch free Baking Powder
  - Even that small amount will be seen on the ingredient statement
- Fat “Powders”
  - Fat plated gum acacia
    - FDA now says acacia may not count as a non digestible carb
- Coconut Powder
  - Usually plated on milk or tapioca maltodextrin (carbs)
Keto Challenges

- Products have so much fat they are oily, greasy and oil seeps out of the package
- So much fiber and sugar alcohol that the product causes GI distress
- High in egg white/eggs and almond flour so bread tastes more like “cake”
- Allulose (sugar substitute) performs like fructose and won’t hit harder stage (hard ball, crack, etc.)

*Keto clients don’t mind, they accept these negatives as long as the bar has keto metrics and doesn’t mess up their blood sugar and they can stay in ketosis*
Keto Product Solutions

- Recommend on packaging that client keep greasy bars refrigerated
- Sell item as a refrigerated “fresh-like” product to push consumers into keeping it cool
- Manufacture and warehouse product in cool locations
- Make sure label clearly shows grams of fiber and sugar alcohol so consumer can eat at their own risk
- Try to differentiate from the other brands with seasonings and flavors that remind consumer of higher carb products
- Use expensive manufacturing methods like freeze drying to create unique naturally keto products into a shelf stable format
- Use allulose instead of sugar alcohols to prevent gastro-distress
- Combine allulose with other low/no sugar syrups for functionality

**Naturally Keto-ish but Expensive**
- Frozen Egg Bites
- Freeze-Dried Cheese
- Freeze-Dried Meats/Beef Jerky

**More Processed and Formulated Keto products**
- Nutrition Bars
- Frozen Desserts
- Dry Mixes
- Protein Shakes
- Cookies
The FODMAP Diet!

FODMAPs are a collection of short-chain carbohydrates (sugars) that aren’t absorbed properly in the gut, which can trigger symptoms in people with IBS. FODMAPs are found naturally in many foods and food additives.

- **FERMENTABLE (ingredients)**
  - Process through which gut bacteria ferment undigested carbohydrates to produce gas
- **Oligosaccharides**
  - Fructans and galactooligosaccharides (GOS) found in wheat, rye, onion, garlic, legume/pulses
- **Disaccharides**
  - Specifically lactose found in cheese/dairy
- **Monosaccharides**
  - Fructose like that found in honey, apples, HFCS
- **Polyols**
  - Sugar alcohols like sorbitol and mannitol
Staying Within the Certification Guidelines

- There are no FDA or USDA sanctioned certifications for FODMAP, but there is one private one that brand owners use as a guide to provide to the food scientist/developer.
  - Monash University: (monashfodmap.com) they evaluate the product to ensure it is in compliance with the guidelines set up by Monash University Researchers.
  - Foods are included on the app used by 2 million people.
Formulating for FODMAP

- Avoid the ingredients not allowed in a FODMAP diet
- Use easy to digest flours and sugars
- Sort of like the way we used to formulate 20 years ago—pre low carb, Atkins, keto, etc.
- Can have low levels of gluten (does not have to be gluten free) but should be low in wheat since wheat has fructans
NOT Acceptable Ingredient Choices for Keto Formulations *

some may be OK in small amounts

- **OligioSaccharides**
  - Wheat, Rye, Onion, Garlic
  - Beans, Peas
  - Raisins, Dates

- **Disaccharides**
  - Milk, Cottage Cheese, Yogurt, Ice Cream

- **MonoSaccharides**
  - Mango, Honey, Asparagus, Sugar Snap Peas

- **Polyols**
  - Peach, blackberry, prunes, Avocado, Celery, Cauliflower
FODMAP FORMULATION

CHALLENGES

- Lots of ingredients have FODMAPS but high and low levels within each category of food, we have to identify if they are low- and high-FODMAP ingredients and formulate portion sizes that match allowable levels.

- Flavor shortage! How to get in flavor when you can’t use garlic, onion, mushrooms?

- Dealing with typical production runs that have a weight range, when these products almost need to be treated like a supplement.

- Getting Educated—this is a newer dietary lifestyle, someone has to educate the developers!

- Getting in enough nutrients for those that are not only FODMAP but also gluten free and vegan.
FODMAP Solutions

- Work with top-notch co-packers that understand formulation accuracy in production
- Season with other spices that are not high in FODMAPS
- Careful calculations to incorporate low-FODMAP ingredients into a product

FODMAP Products on the Market

Salad Dressings
Marinades
Baked Goods
Nutrition Bars
Cookies
The Gluten-Free Diet

- Has no gluten

That’s it!
Staying Within the Certification Guidelines

- Gluten-free certification done by GFCO, but many more out there.
- None are USDA certified
- To have a GF certified product, you must test less than 10 ppm (strict standards, more than FDA at 20 ppm)
Gluten-Free Ingredient Selection General Rules

- No gluten containing ingredients
- No ingredients that may have been cross-contaminated with gluten
- Work with suppliers that have the gluten-free certification as well (helps if you want to certify your own finished product)
Ingredients for Gluten Free

Acceptable

- Tapioca
- Sorghum
- Amaranth
- Rice
- Brown Rice Flours
- Potato Flour
- Nut Flours
- Quinoa
- Buckwheat
- Gums (Xanthan, Guar, Acacia)

Not Acceptable

- Wheat
- Rye
- Barley
- Tricilate
- Malt in all forms
- Cous Cous
- Semolina
- Yeast
Gluten-Free Formulation Challenges

- Not being able to use wheat or gluten affects bread products and baked goods
- Cross-contamination from gluten-free ingredients that come from a facility that also handles gluten ingredients
- Creating flour blends for baking (a popular gluten-free item) that is functional across the board in all applications
Gluten Product Solutions

- Buy from certified gluten-free facilities
- Produce in a gluten-free facility
- Use egg and xanthan gum to help baked goods have more height and fluffy texture
- Make sure seasoning blends are formulated without gluten or yeast

Lots of naturally gluten-free treats!

Meats
Dairy
Desserts

Processed and Formulated Gluten-Free Products include

Nutrition Bars
Dry Mixes
Protein Shakes
Cookies
The Strict Vegan Diet!

**All Vegetable Diet**
- No cheese
- No dairy
- No honey
- No insects
- No eggs
- No sugar filtered through bone char
- No fish
- No meat
- No liquids filtered or de-foamed with animal products
- No animal genes, GMO’s
Staying Within the Vegan Guidelines

- Certified Vegan (vegan.org)
  - product cannot contain any animal products, byproducts or products that have been tested by animals
Formulating for Vegan

- Stay away from eggs, milk, honey
- Take advantage of gums and stabilizers to help create texture where egg, dairy and other emulsifying and/or whipping agents can’t be used.
- Keep track of supplier paperwork and ask for proof that there are no animal products, byproducts or tested on animal confirmation.
Acceptable Ingredient Choices for Vegan Formulations

Acceptable vegan ingredients

- All Flours
- Yeasts
- All plant-based ingredients
- Gums like Guar, Locust, Xanthan
  - Xanthan from non-animal sources
- Soluble Fibers
- Sugar Alcohol (Erythritol)
- Fats
  - Most plant based fats are OK
- Plant based proteins
  - Soy, pea, hemp, potato protein, rice protein
- Tofu

NOT acceptable vegan ingredients

- Eggs
- Dairy
- Gelatin
- Honey
- Insects
- Sweeteners processed through Bone Char
- Ingredients processed with defoamers from animals
- Lard
- Bacon
Vegan Challenges

- No eggs or dairy to help emulsify, whip, create texture
- Recreating non-vegan foods into vegan “versions” and having it taste and look the same
  - i.e., vegan meat, vegan cheese
- Paperwork tracking—making sure co-packers and suppliers have the right documentation
- Traceability of ingredients
Vegan Product Solutions

- Gums are your friend—use them to replace eggs and dairy for thickening and aeration
- Suspension of particulates when recreating nut and vegan protein versions of “milk”
- Use textured proteins to create the texture of “fake meat”
- Use yeast flavors to recreate savory tastes for cheese and fake dairy products
- Natural vegan flavors that taste like dairy, smoke (meat), creaminess
Even More Challenging…

The DUAL dietary processed food products

Makes sense:
Gluten Free + Keto
Vegan + Gluten Free
Even more challenging—the dual lifestyle products

What Works

- Keto + Gluten free
- Vegan+ Gluten free
- Vegan+ FODMAP
- FODMAP + Gluten free

More Challenging

- Gluten free + Grain free + Keto
- Keto-Vegan
- Vegan-Grain free+ Gluten free
NEXT Concept Lab

Betting on a product’s potential success in the marketplace

WORKSHOP: Blurring the Line Between Food Trend and Fad
Friday, Oct. 18, 2019
Using prediction markets to evaluate trends

- NEXT Trend Concept Lab provides a multifaceted view of the market’s reaction to a new product concept.
- Sample a representative population of the United States (1,000 interviews)
- Test client concepts, plus benchmark concepts—often on-shelf products
- Profile consumers into consumer segments
- Assess cultural relevance leveraging “Wisdom of the Crowds” to make predictions of the success of concepts in market
- Assess personal relevance by asking consumers if they would buy a product (purchase intent)
- For individual products, we use benchmarks to assess relative performance
Using prediction markets to evaluate trends

- Are your ideas strong enough to move forward?
- What is the next best addition to your product portfolio?
- What benefits or messaging resonates most with consumers?
- Which of your new products ideas has the greatest potential?
- How do you demonstrate your product’s potential to buyers or investors?
# Methodology

<table>
<thead>
<tr>
<th>Concepts Tested in Representative and Competitive Marketplace</th>
<th>40 concepts tested monthly in a competitive marketplace and evaluated against benchmarks. Sample size = 1,000 consumers, representative of the U.S. general population.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prediction Market Methodology</td>
<td>Leverage “wisdom of crowds” and gamification to predict the success of an idea.</td>
</tr>
<tr>
<td>More Predictive</td>
<td>Consumers place bets for or against concepts based upon all available knowledge. This methodology is more predictive of future outcomes than traditional methods.</td>
</tr>
<tr>
<td>Market Prediction &amp; Cultural Relevance</td>
<td>Market Prediction Score assesses the probability of success for a concept. This metric can also be seen as a measure of “cultural relevance.”</td>
</tr>
<tr>
<td>Purchase Intent &amp; Personal Relevance</td>
<td>Purchase Intent Score reflects the % of consumers who will purchase the concept in the next year. This metric can also be seen as a measure of “personal relevance.”</td>
</tr>
<tr>
<td>Results Cut by Consumer Segments</td>
<td>Results cut by New Hope’s proprietary consumer segmentation and four Major U.S. Census Regions, in order to inform targeting and distribution strategy.</td>
</tr>
</tbody>
</table>
The Consumer Segmentation Study

- Studied over 5,000+ consumers across the U.S., representing more than 90% of population.
- Evaluated feelings, opinions and usage of nutrition, lifestyle and healthy products.
- Evaluated affinity for new product concepts representing over 50% of a typical grocery/retail store shelf stock.
- Outcome: A **new, unique market segmentation** that enables companies to more effectively target interested, passionate consumers with new products, concepts, messaging, and marketing strategies in order to optimize product success across all consumer groups.
Fad-focused shoppers are on a quest for healthy eating

#YOUNG4EVER

Consumers in this segment take more aggressive actions toward health and wellness because they want to stay feeling and looking young. These early adopters are impulsive brand switchers and not as concerned with price. They're also more likely to be younger, more racially diverse males who are more focused on themselves than on family.

- 23% of population
- 56% male
- 37% age 18-34
- 50% single
- 38% with kids -18
Label-reading moms seek research-backed health products

CHIEF HEALTH OFFICERS

These label-reading, family-focused health managers eat healthy but don’t use supplements. They will try and pay more for health products—but only if they are backed by research. These consumers also like to share what they know with others.

- 21% of population
- 58% female
- 42% age 18-34
- 50% married
- 36% with kids -18
Price-conscious consumers take their health cues from doctors

4 OUT OF 5 DOCTORS

Made up of mostly older consumers, this segment listens to doctors and actively follows traditional health and wellness advice. These shoppers are less likely to try new things because they are happy with current choices. They purchase less natural and organic because of price.

- 22% of population
- 57% female
- 52% age 55+
- 66% married
- 23% with kids -18
These busy shoppers prioritize convenience over health.
Taste (not health) is the focus for these happy-go-lucky consumers
Objective

CONCEPTS TESTED: FROZEN PIZZA

We evaluated essentially side-by-side comparisons of frozen pizza in a variety of versions:

- Keto
- Gluten free
- Traditional
- Paleo
- Vegan
- Low-FODMAP
Category Benchmarks

- The prediction score for keto pizza was very high so we are likely to see more coming to market.
- Gluten-free pizza also scored high on market prediction.
- Paleo and vegan pizzas did fairly well in the prediction market, meaning they are probably still on the uptick.
- Low-FODMAP scored the lowest, but it's a newer concept and isn't yet taking off.
- Looking at what people said they will buy for themselves, the clear winner is still a traditional pizza.
- More than 10% of Americans said they would buy keto, gluten-free and paleo pizzas, which is interesting because fewer than that percentage actually identify as keto, paleo and vegan.

<table>
<thead>
<tr>
<th></th>
<th>Market Prediction</th>
<th>Purchase Intent</th>
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<tbody>
<tr>
<td>Keto-friendly frozen pizza</td>
<td>89</td>
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<tr>
<td>Gluten-free frozen pizza</td>
<td>87</td>
<td>11</td>
</tr>
<tr>
<td>Traditional frozen cheese pizza</td>
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<td>24</td>
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<tr>
<td>Paleo-friendly frozen pizza</td>
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<td>11</td>
</tr>
<tr>
<td>Vegan frozen pizza</td>
<td>82</td>
<td>15</td>
</tr>
<tr>
<td>Low-FODMAP frozen pizza</td>
<td>73</td>
<td>6</td>
</tr>
<tr>
<td>All Concept Average</td>
<td><strong>72</strong></td>
<td><strong>12</strong></td>
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</table>
Keto Frozen Pizza
Made from a cauliflower crust made with, egg and cheese, resulting in only 9 g carbs per serving. Topped with mozzarella and vegetables.

**Scorecard**

<table>
<thead>
<tr>
<th>Consumer Segments (Total U.S.)</th>
<th>U.S. Census Regions (All Consumer Segments)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Prediction</td>
<td>Purchase Intent</td>
</tr>
<tr>
<td>#Young4Ever</td>
<td>92</td>
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<tr>
<td>Chief Health Officers</td>
<td>93</td>
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<tr>
<td>4 out of 5 Doctors</td>
<td>83</td>
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<tr>
<td>Guilty and Defeated</td>
<td>92</td>
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<tr>
<td>Life Tastes Good</td>
<td>57</td>
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</table>

**Market Prediction Score**

89

**Purchase Intent Score**

12

**# Est Buyers**

28M

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*Assuming 100% awareness, distribution, and price meets consumer expectations. #Est Buyers is calculated by multiplying % Purchase Intent by US Adult Population Size for each segment and region. Due to rounding error, segment and region estimates may not sum to total US market estimate.
**Keto Frozen Pizza**

**POSITIVE**
- This is so trendy and ostensibly healthy so people will buy more of it.
- Like that it's another convenient keto option.
- A good product to attract gluten-free and keto shoppers.
- Low-carb alternative to one of America's favorite foods.

**NEGATIVE**
- Keto is a popular fad and will die off just like all the others diets.
- Only a certain group will gravitate toward product.
- This is an abomination.
- Only appealing to gym freaks.
- No. Sounds too artificial made with cauliflower crust.
Gluten-free Frozen Pizza

This thin, delicate, flaky gluten-free crust is topped with grilled white meat chicken, a blend of roasted vegetables, mozzarella cheese and sauce made from whole, vine-ripened tomatoes.

**Scorecard**

**Consumer Segments (Total U.S.)**

<table>
<thead>
<tr>
<th>Segment</th>
<th>Market Prediction</th>
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<td>17</td>
<td>8M</td>
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<tr>
<td>4 out of 5 Doctors</td>
<td>74</td>
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<tr>
<td>Guilty and Defeated</td>
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<tr>
<td>Life Tastes Good</td>
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**U.S. Census Regions (All Consumer Segments)**

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<td>Market Prediction</td>
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<td># Est Buyers*</td>
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Gluten-free Frozen Pizza

**POSITIVE**

- Gluten-free pizzas are VERY expensive. This will kick off instantly.
- Healthy and convenient.
- People are buying more gluten-free products then ever before.
- Great for people who have genuine gluten allergies and need tasty alternatives.

**NEGATIVE**

- Don't you know that "gluten free" is so yesterday?
- Gluten free has been a good fad, but it's wearing thin.
- Too much of the same old.
- Cholesterol and fats.
- Gluten free is a healthy choice but it would lack the taste of a normal pizza.
**Traditional Frozen Pizza Scorecard**

This pizza has a thin crispy crust, tomato sauce and four kinds of cheese—edam, asiago, pecorino, and grana Padano. Just bake and serve.

<table>
<thead>
<tr>
<th>Consumer Segments (Total U.S.)</th>
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</thead>
<tbody>
<tr>
<td>Young &amp; Ever</td>
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<td>Chief Health Officers</td>
<td>91</td>
<td>28</td>
<td>13M</td>
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<tr>
<td>Age 50 &amp; Over, Doctors</td>
<td>81</td>
<td>22</td>
<td>11M</td>
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<tr>
<td>Guilty &amp; Defeated</td>
<td>88</td>
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<tr>
<td>Life Values: Good</td>
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<td>South</td>
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<td>22</td>
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<tr>
<td>West</td>
<td>80</td>
<td>27</td>
<td>11M</td>
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</tbody>
</table>

Market Prediction Benchmark Average = 87, Min = 71, Max = 91
Purchase Intent Benchmark Average = 24%, Min = 19%, Max = 32%

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POSITIVE

The number of different cheese on the pizza makes it even better.

Appeals to those who know they are still eating a frozen pizza but it’s also exotic with all those fancy cheeses.

Those are toppings you don't often see, and people would like them.

It's like a fancier cheese pizza than those you can get from pizza places.

NEGATIVE

The crust may be thin but four kinds of cheese is a bit more than needed.

Not sure about the cheeses, never heard of them.

Not familiar with ingredients.

High in fats and cholesterol. Some may be allergic to cheese.

What makes this pizza better than other cheese pizzas? No need to switch to it.
Paleo Frozen Pizza

This pizza is made from almond flour, eggs, arrowroot flour. It is topped with tomatoes, dairy-free cheese and other delicious veggies.

### Scorecard

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<td>91</td>
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<tr>
<td>4 Out of 5 Doctors</td>
<td>63</td>
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<tr>
<td>Guilty and Defeated</td>
<td>66</td>
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<tr>
<td>Life Tastes Good</td>
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Paleo Frozen Pizza

**POSITIVE**

- It's healthy, full of nutrients, but also tastes good.
- This fills a special place. I have not seen a paleo-friendly pizza with these ingredients.
- This is very trendy at the moment so people will buy it.
- Seems good from the description.

**NEGATIVE**

- The types of flour and cheese used are not conducive to producing a tasty product.
- Too strange ingredient-wise.
- Sounds awful.
- Dairy-free cheese tastes disgusting.
- When I eat pizza I want regular, indulgent pizza.
Vegan Frozen Pizza

This vegan pizza is made with Daiya mozzarella style shreds. It has a thinner, hand-stretched wheat crust, diced tomatoes and Italian-style pizza sauce with fragrant basil.

Scorecard

**# Est Buyers**

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</tbody>
</table>

**U.S. Census Regions (All Consumer Segments)**

<table>
<thead>
<tr>
<th>Region</th>
<th>Market Prediction</th>
<th>Purchase Intent</th>
<th># Est Buyers*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Region 1</td>
<td>76</td>
<td>15</td>
<td>8M</td>
</tr>
<tr>
<td>Region 2</td>
<td>81</td>
<td>14</td>
<td>7M</td>
</tr>
<tr>
<td>Region 3</td>
<td>76</td>
<td>18</td>
<td>15M</td>
</tr>
<tr>
<td>Region 4</td>
<td>92</td>
<td>14</td>
<td>6M</td>
</tr>
</tbody>
</table>

*Assuming 100% awareness, distribution, and price meets consumer expectations. #Est Buyers is calculated by multiplying % Purchase Intent by US Adult Population Size for each segment and region. Due to rounding error, segment and region estimates may not sum to total US market estimate.
Vegan Frozen Pizza

POSITIVE

The vegan community is growing.

Worth the money.

The cheese sounds awesome, as does the sauce.

NEGATIVE

It doesn't sound like it would taste good, and taste is an important factor in sales for a food product.

No point in eating pizza if you are vegan.

Sounds awful.

Frozen pizza market is already flooded.

Not enough vegans to lure a bigger market share.
Low-FODMAP Frozen Pizza

This pizza is made from gluten-free flour, San Marzano tomatoes, mozzarella cheese and basil.

Scorecard

<table>
<thead>
<tr>
<th>Consumer Segments (Total U.S.)</th>
<th>Market Prediction</th>
<th>Purchase Intent</th>
<th># Est Buyers*</th>
</tr>
</thead>
<tbody>
<tr>
<td>#Young4Ever</td>
<td>74</td>
<td>7</td>
<td>4M</td>
</tr>
<tr>
<td>Chief Health Officers</td>
<td>80</td>
<td>9</td>
<td>4M</td>
</tr>
<tr>
<td>4 out of 5 Dealers</td>
<td>69</td>
<td>7</td>
<td>3M</td>
</tr>
<tr>
<td>Guilty and Defeated</td>
<td>64</td>
<td>4</td>
<td>2M</td>
</tr>
<tr>
<td>Life Tastes Good</td>
<td>59</td>
<td>0</td>
<td>0M</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>U.S. Census Regions (All Consumer Segments)</th>
<th>Market Prediction</th>
<th>Purchase Intent</th>
<th># Est Buyers*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northeast</td>
<td>76</td>
<td>8</td>
<td>4M</td>
</tr>
<tr>
<td>Midwest</td>
<td>75</td>
<td>7</td>
<td>3M</td>
</tr>
<tr>
<td>South</td>
<td>68</td>
<td>5</td>
<td>4M</td>
</tr>
<tr>
<td>West</td>
<td>75</td>
<td>6</td>
<td>2M</td>
</tr>
</tbody>
</table>

Market Prediction Benchmark Average=73, Min=59, Max=80
Purchase Intent Benchmark Average=6%, Min=0%, Max 9%

*Assuming 100% awareness, distribution, and price meets consumer expectations. #Est Buyers is calculated by multiplying % Purchase Intent by US Adult Population Size for each segment and region. Due to rounding error, segment and region estimates may not sum to total US market estimate.
Although I'm not a fan of frozen pizza, this one has ingredients that interest me.

This sounds yummy, but I hope it won't cost a fortune.

FODMAP is something that people are hearing more about and looking into.

Popular flavors and gluten free. Wonderful.

Never heard of this before and not a very good description.

Weird name.

No idea what that title is supposed to mean?

Not appealing.

With no meat or several cheeses, this pizza will not do well, at least not in the U.S.
Thank you for attending!

WORKSHOP: Blurring the Line Between Food Trend and Fad
Friday, Oct. 18, 2019