

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Despite consumers' interest in eating healthier, they also want food that tastes good. While government, food manufacturers and restaurants try to provide healthier options to Americans, these organizations are up against several challenges, especially regarding how to market low/no/reduced sodium items."

- Emily Krol, Health and Wellness Analyst

In this report we answer the key questions:

- Consumers believe they should be responsible for choosing food and drink, but many recent rulings have impacted availability of certain products. What is the impact of government regulation on consumer choices?
- Consumers want food that tastes good, but know that high-sodium contents are unhealthy. How can restaurants and packaged foods companies reduce sodium content without alienating people who want great-tasting food?
- The jury is still out regarding how bad sodium really is, especially for those who do not suffer from hypertension or high blood pressure. How will this affect consumer perceptions of low-sodium products?

According to the Centers for Disease Control and Prevention (CDC) about 90% of Americans over the age of two consume too much sodium, which increases the risk for high blood pressure. High blood pressure increases the risk for heart disease and stroke.

Therefore, limiting sodium in one's diet is becoming increasingly important, not only to stay healthy and disease free, but also to avoid unnecessary weight gain.

Most sodium consumption comes from processed foods and restaurant fare. Manufacturers and restaurant owners have an opportunity to create lower-sodium products that will be healthier for customers. Additionally, there is opportunity for alternatives to traditional table salt in cooking.

The purpose of this report is to look at how demographic shifts affect demand for reduced-sodium products. The report will also explore how and why consumers limit sodium in their diet, and offer solutions based on these reasons. Consumer opinions regarding who should be responsible for imposing sodium restrictions are also included.

Marketing low/no/reduced-sodium products presents a challenge to marketers in that sometimes consumers are turned off by such claims due to a taste consideration. Therefore, current marketing strategies are explored and recommendations offered for how to continue to market these products.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

арас +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Scope and Themes

What you need to know Definition Data sources Consumer survey data Advertising creative Abbreviations and terms Abbreviations Terms

Executive Summary

The market

Figure 1: Mean amounts of sodium consumed per individual, by gender and age, in the U.S., 2009-10

Market factors

Population

Figure 2: Total U.S. population aged 18 or older, by age, 2013 and 2018 and currently limiting sodium intake, by age, November 2012

Figure 3: Population by race and Hispanic origin, 2013 and 2018, and currently limiting sodium intake, by race/Hispanic origin, November 2012

Figure 4: Median household income, in inflation-adjusted dollars, 2001-11

Figure 5: Currently limiting sodium intake and concern about amount of sodium in diet, by household income, November 2012

Usage of low-sodium products has increased

Figure 6: Household use of unsalted nuts, pretzels, potato chips, crackers, and tuna, May 2003-June 2012

Unhealthy lifestyles of Americans

Marketing

The consumer

Reasons for limiting sodium

Figure 7: Reasons for limiting sodium, by gender, November 2012

Sodium-limiting behaviors

Figure 8: Ways to limit sodium, by gender, November 2012

Attitudes toward sodium

Figure 9: Attitudes toward sodium, by sodium limiters, November 2012

What we think

Issues in the Market

Consumers believe they should be responsible for choosing food and drink, but many recent rulings have impacted availability of certain

products. What is the impact of government regulation on consumer choices?

Figure 10: Sodium restriction responsibility, by gender, November 2012

Consumers want food that tastes good, but know that high-sodium contents are unhealthy. How can restaurants and packaged foods companies reduce sodium content without alienating people who want great-tasting food?

BUY THIS REPORT NOW

VISIT: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100 EMALL: oxygen@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The jury is still out regarding how bad sodium really is, especially for those who do not suffer from hypertension or high blood pressure. How will this affect consumer perceptions of low-sodium products?

Insights and Opportunities

Tools/Apps

Food labels

Retail

Restaurants

Trend Applications

Trend: Sense of the Intense

Trend: The Big Issue

Figure 11: Food products purchased for dieting, April 2011-June 2012

2015 Trend: East Meets West

Market Factors

Key points

Demographics

Age

Figure 12: Population, by age, 2008-18

Figure 13: Mean amount of sodium consumed per individual, by gender and age, in the U.S., 2009/10

Ethnicity

Figure 14: Population, by race and Hispanic origin, 2008-18

Median income

Figure 15: Median household income for households headed by whites, in inflation-adjusted dollars, 2001-11

Unhealthy habits of Americans

Figure 16: Ailments suffered, by reason for watching diet, April 2011-June 2012

Increase in those limiting sodium and usage of low-sodium products

Figure 17: Reasons for watching diet, 2006-12

Figure 18: Household use of unsalted nuts, pretzels, potato chips, crackers, and tuna, May 2003-June 2012

Initiatives

Innovations and Innovators

Food

Figure 19: Share of food products launched with low/no/reduced-sodium claim, 2007-12

Figure 20: Food products launched with low/no/reduced-sodium claim, by top 10 subcategories, 2007-12

Figure 21: Share of branded/private label food product launches with low/no/reduced-sodium claim, 2007-12

Drinks

- Figure 22: Share of drink products launched with low/no/reduced-sodium claim, 2007-12
- Figure 23: Drink products launched with low/no/reduced-sodium claim, by top 10 subcategories, 2007-12
- Figure 24: Share of branded/private label drink product launches with low/no/reduced-sodium claim, 2007-12

Carbonated soft drinks

BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100 EMALL: oxygen@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Flavored water, carbonated water

Other innovations

Figure 25: Soda-Lo online advertisement, 2013

Select Brand Analysis

Campbell's

Figure 26: Campbell's, television ad, 2012

Kraft

Figure 27: Kraft, television ad, 2013

Mrs. Dash

Figure 28: Mrs. Dash, television ad, 2012

McCormick spices

Figure 29: McCormick, television ad, 2012

Sodium Limiters

Key points

Six out of 10 watching sodium levels

Both men and women watch sodium levels, but for slightly different reasons

Figure 30: Reasons for limiting sodium, by gender, November 2012

Watching sodium intake increases with age

Figure 31: Reasons for limiting sodium, by age, November 2012

Lowest household income most likely to watch sodium levels

Figure 32: Reasons for limiting sodium, by household income, November 2012

Presence of children

Figure 33: Reasons for limiting sodium, by presence of children in household, November 2012

Sodium Limiting Behaviors

Key points

Putting away the salt shaker

Female sodium limiters read labels

Figure 34: Ways to limit sodium, by gender, November 2012

Educate older men about sodium consumption

Figure 35: Ways to limit sodium, by gender and age, November 2012

More affluent consumers likely able to afford healthier food products

Figure 36: Ways to limit sodium, by household income, November 2012

Presence of children

Figure 37: Ways to limit sodium, by presence of children in household, November 2012

Shopping Habits of Sodium Limiters

Key points

Where sodium limiters shop

Figure 38: Retailers and channels most often shopped for food/drink, by limiting vs. not limiting sodium, November 2012

BUY THIS REPORT NOW VISIT: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100 EMAIL: oxygen@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Strategies to save money when grocery shopping

Figure 39: Saving strategies when grocery shopping, by limiting vs. not limiting sodium, November 2012

Innovations and improvements sought in grocery shopping experience

Figure 40: Innovations and improvements sought in the grocery shopping experience, by limiting vs. not limiting sodium, November 2012

Appealing retail offerings when shopping for food and drink

Figure 41: Important retailer offerings when shopping for food and drink, by limiting vs. not limiting sodium, November 2012

Interest in Sodium-Limiting Products

Key points

Sodium limiters using a variety of herbs and spices to limit sodium

Figure 42: Products to limit sodium intake, November 2012

Women more likely to use salt alternatives

Figure 43: Product used to limit sodium intake, by gender, November 2012

Older male sodium limiters not using as many products to limit

Figure 44: Product used to limit sodium intake, by gender and age, November 2012

Figure 45: Product not used, but would be interested in trying to limit sodium intake, by gender and age, November 2012

Higher household incomes more likely to use seasonings, herbs, and spices

Figure 46: Product used to limit sodium intake, by household income, November 2012

Figure 47: Product not used, but would be interested in trying to limit sodium intake, by household income, November 2012

Those who use salt alternatives also use a variety of products

Figure 48: Product used to limit sodium intake, by ways to limit sodium, November 2012

Attitudes Toward Sodium/Health

Key points

Respondents prefer to control amount of sodium in their food

Older women most likely to prefer to cook at home to control sodium

Figure 49: Attitudes toward sodium, by gender and age, November 2012

Educate lower household incomes who are concerned about sodium intake

Figure 50: Attitudes toward sodium, by household income, November 2012

Brands have an opportunity to educate consumers who are confused

Figure 51: Attitudes toward sodium, by sodium restriction responsibility, November 2012

Nonsodium limiters not concerned with amount of sodium in their diet

Figure 52: Attitudes toward sodium, by sodium limiters, November 2012

Relationship Between Sodium and Dieting

Key points

Older respondents most likely to watch diet for salt intake

Figure 53: Salinity monitor spoon

Figure 54: Reasons for dieting, by age, April 2011-June 2012

Food products purchased when dieting

Figure 55: Diet food products, by age, April 2011-June 2012

BUY THIS REPORT NOW

VISII: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100 EMAIL: oxygen@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 56: Diet food products, by household income, April 2011-June 2012

People watching their diet for salt intake eat healthier

Figure 57: Attitudes/opinions about food and diet, all vs. those watching diet for salt intake, April 2011-June 2012

Sodium limiters healthier than nonsodium limiters

Figure 58: Agreement with attitudes toward health, by sodium limiters, November 2012

Race and Hispanic Origin

Key points

Other ethnicities most likely to be currently watching sodium

Figure 59: Reasons for limiting sodium, by race/Hispanic origin, November 2012

Sodium limiting behavior

Figure 60: Ways to limit sodium, by race/Hispanic origin, November 2012

Figure 61: Product not used, but would be interested in trying to limit sodium intake, by race/Hispanic origin, November 2012

Black respondents prefer to control sodium through cooking own food

Figure 62: Attitudes toward sodium, by race/Hispanic origin, November 2012

Cluster Analysis

Figure 63: Target clusters, November 2012

Demographics Characteristics Opportunity Cluster 2: Health Conscious Demographics Characteristics Opportunity

Cluster 1: Healthy Investors

Cluster 3: Pass the Salt

Demographics

Characteristics

Opportunity

Cluster characteristic tables

Figure 64: Reasons for limiting sodium, by target clusters, November 2012

Figure 65: Ways to limit sodium, by target clusters, November 2012

Figure 66: Product used to limit sodium intake, by target clusters, November 2012

Figure 67: Product not used, but would be interested in trying to limit sodium intake, by target clusters, November 2012

Figure 68: Attitudes toward sodium, by target clusters, November 2012

Figure 69: Sodium restriction responsibility, by target clusters, November 2012

Figure 70: Agreement with attitudes toward health, by target clusters, November 2012

Cluster demographics

Figure 71: Target clusters, by demographic, November 2012

Cluster methodology

BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100 EMALL: oxygen@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Appendix: Other Useful Consumer Tables

Sodium limiters

Figure 72: Reasons for limiting sodium, by gender and age, November 2012

Figure 73: Reasons for limiting sodium, by employment, November 2012

Figure 74: Reasons for limiting sodium, by generation, November 2012

Figure 75: Reasons for limiting sodium, by sodium limiters, November 2012

Sodium limiting behaviors

Figure 76: Ways to limit sodium, by age, November 2012

Figure 77: Ways to limit sodium, by generation, November 2012

Figure 78: Ways to limit sodium, by education, November 2012

Figure 79: Product used to limit sodium intake, by ways to limit sodium, November 2012

Figure 80: Product used to limit sodium intake, by ways to limit sodium, November 2012

Figure 81: Product used to limit sodium intake, by ways to limit sodium, November 2012

Shopping habits of sodium limiters

Figure 82: Retailers and channels most often shopped for food/drink, by reasons for limiting sodium, November 2012

Usage of sodium-limiting products

Figure 83: Product used to limit sodium intake, by race/Hispanic origin, November 2012

Figure 84: Product used to limit sodium intake, by sodium limiters, November 2012

Interest in sodium-limiting products

Figure 85: Product not used, but would be interested in trying to limit sodium intake, by gender, November 2012

Figure 86: Product used to limit sodium intake, by age, November 2012

Figure 87: Product not used, but would be interested in trying to limit sodium intake, by age, November 2012

Figure 88: Product not used, but would be interested in trying to limit sodium intake, by sodium limiters, November 2012

Attitudes toward sodium

Figure 89: Attitudes toward sodium, by gender, November 2012

Figure 90: Attitudes toward sodium, by age, November 2012

Figure 91: Attitudes toward sodium, by generation, November 2012

Figure 92: Attitudes/opinions about food, by gender, April 2011-June 2012

New product introduction claims

Figure 93: The 30 most common claims associated with food launches, 2007-12

Figure 94: The 30 most common claims associated with drink launches, 2007-12

Appendix: Trade Associations

BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100 EMALL: oxvaen@mintel.com