

Report Price: £1750.00 | \$2834.04 | €2223.04

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



"That only 7% of people trust health claims on food dilutes their ability to add value. The food industry stands to benefit from combatting the serious lack of awareness about the high level of regulation in place that this implies."

- Colette Warren, Food and Drink Analyst

This report looks at the following areas:

- Scope for food industry to benefit from dispelling lack of trust in health claims
- Confusion around nutritional labelling impedes healthy choices
- Doubts about taste still burden light foods

The majority of adults see the healthiness of food as important. However, this leaves a proportion of consumers who are overweight or obese, but aren't concerned about it. Disrupting this lack of concern remains a key challenge for the government.

The lack of consumer awareness about the work EFSA (European Food Safety Authority) does to regulate fortified foods, widespread doubts about the healthiness of sweeteners and confusion around nutrition labelling are among other areas that need addressing to unlock significant demand among consumers.

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: reports@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: £1750.00 | \$2834.04 | €2223.04

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

Table of Contents

Introduc	tion
Definit	ion
Abbrev	riations
Executiv	e Summary
Market	factors
Obesity	y remains high on government agenda
Sugar	hits the media spotlight in 2014
Nutritio	on details on packaging confuse two in five
Fortifie	d foods remain under scrutiny
New pr	roduct trends
	claims dominate new launches with health claims ure 1: Share of launches with health* claims of all new products in the UK food market, 2010-14
Free-fr	om leads in minus claims, low sugar leaps ahead in 2014
Plus cla	aims are growing, though still small
Functio	onal claims gain share in 2014
The co	nsumer
	nan a quarter of people worry about weight ure 2: Consumers' health concerns, November 2014
	ness of food is more important than cost but behind taste ure 3: Factors deemed important* when purchasing food for home, November 2014
	n five look for foods which count towards your 5-a-day ure 4: Factors influencing purchase of food for use at home, November 2014
Friends	s and family are relied on most for healthy eating advice
Figu	are 5: Resources used for advice/help on healthy eating, November 2014
	onal information still unclear to many ure 6: Attitudes towards healthy eating, November 2014
	pelieve health claims are made without scientific proof ure 7: Attitudes towards products with health claims/benefits, November 2014
What v	ve think
ssues a	nd Insights
Scope	for food industry to benefit from dispelling lack of trust in health claims
The fac	cts
The im	plications
Confus	ion around nutritional labelling impedes healthy choices
The fac	cts
The im	plications

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 EMALL: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

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

Doubts about taste still burden light foods

The facts

The implications

Trend Application

Trend: Prove It

Trend: Help Me Help Myself

Mintel Future: Brand Intervention

Market Drivers

Key points The Public Health Responsibility Deal

250kCal cap on single-serve confectionery

New salt targets

Obesity remains high on government agenda

Prevalence

Cost

Initiatives

NHS 2014 five-year plan

Sugar hits the media spotlight in 2014

Sweeteners continue to face scepticism

Nutrition details on packaging confuse two in five

Front of Pack Nutrition Labelling scheme

Two in five people find nutrition information confusing

Fortified foods remain under scrutiny

New Product Trends

Key points

Methodology

Minus claims dominate new launches with health claims

Figure 8: Share of launches with health** claims of all new products in the UK food market, 2010-14

Low/no/reduced allergen claims form the largest part of the minus claims category Figure 9: Share of new product launches with minus claims in the overall UK food market, by claim, 2010-14

Low/no/reduced sugar claims leaped ahead in 2014

Three years of growth in the share of products making plus claims

Figure 10: Share of new product launches with plus claims in the overall UK food market, by claim, 2010-14

The share of products making high-fibre claims grew in 2014

An increase in high-protein claims contributed to the growth in plus claims in 2014

Vitamin/mineral fortification moves to new realms

The share of launches with functional claims increased in 2014

Figure 11: Share of new product launches with functional claims in the overall UK food market, 2010-14

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: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

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

Energy claims centre around 'fuel for the day'

Bone health claims move to more indulgent categories

Selected products look to konjac for satiety proposition

Operators look to 'superfoods' for natural fortification

Branded NPD increases its share of launches with health claims

Figure 12: New product launches with health* claims in the food market, branded vs own-label, 2010-14

Coconut drives flavour and function in 2014

Figure 13: top 10 flavours (inc. blends) among new product launches featuring minus, functional or plus claims, 2014

Brand Research

Key points

Methodology

Activia leads as caring, Weetabix as healthy

Figure 14: Top 10* food brands, by association with "A brand that cares about my health/ wellbeing", 2013 and 2014

Figure 15: Top 10* food brands, by association with "Healthy", 2013 and 2014

The 'actively healthy' proposition

Brands look to reassure shoppers of their taste credentials

The 'naturally good for you' brands

Healthy Eating Topics Online

What you need to know

Online topics

Figure 16: Online mentions of selected topics, October 2011-January 2015

Research on obesity ensures its presence in online discussions

Figure 17: Topic cloud around obesity, October 2011-January 2015

Eating healthily represents a lifestyle change

Figure 18: Topic cloud around healthy eating, October 2011-January 2015

Discussion around healthy eating tends to be somewhat seasonal

Figure 19: Conversation around healthy eating, by month, October 2011-January 2015

Consumer interest in healthy eating peaks in January...

...with a little encouragement required to keep interest sustained past February

Five-a-day could be more encouraging towards including children

Figure 20: Topic cloud around five-a-day mentions, October 2011-January 2015

Sugar content topic cloud reveals diabetes as a main concern

Figure 21: Topic cloud around sugar content, October 2011-January 2015

Superfoods make up parts of different healthy eating aims

Figure 22: Topic cloud around superfoods, October 2011-January 2015

Figure 23: Mentions of selected superfoods, October 2011-January 2015

Versatility influences online mentions context

Figure 24: Correlation between mentions referencing superfood status, and mentions referencing health benefits, October 2011-January 2015

Red meat links to discussion of health concerns, while research may drive increase in topic mentions

BUY THIS

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



Report Price: £1750.00 | \$2834.04 | €2223.04

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

Figure 25: Topic cloud around red meat mentions, October 2011-January 2015

Salt content topics similar to sugar but fewer mentions may indicate lower concern Figure 26: Topic cloud around salt content mentions, October 2011-January 2015

The Consumer – Health Concerns

Key points

More than a quarter of people worry about weight

Figure 27: Consumers' health concerns, November 2014

A quarter of people are concerned about tiredness

Joint health concerns are far more prevalent than bone health

Figure 28: Most common consumer health concerns, by gender and generation, November 2014

The Consumer – Factors Influencing Purchase of Food for Home

Key points

Healthiness of food is more important than cost but behind taste

Figure 29: Factors deemed important* when purchasing food for home, November 2014

Food must deliver on taste, though low price remains front of mind

Three in five think about the healthiness of food

Fuller for longer is an important choice factor for half of people

Three in 10 look to food for an energy boost

The Consumer – Nutritional Attributes Sought from Food

Key points

Three in five look for foods which count towards your 5-a-day

Figure 30: Factors influencing purchase of food for use at home, November 2014

The nation is falling short of its 5-a-day target

Opportunity for more 'low in' launches

Many people avoid sweeteners

Discrepancies between health concerns and products sought

The Consumer – Resources Used for Advice/Help on Healthy Eating

Key points

Friends and family are relied on most for healthy eating advice Figure 31: Resources used for advice/help on healthy eating, November 2014

Use of healthy eating apps remains low

Younger cohorts seek out advice the most

Only one in four people have used traffic light labelling

The Consumer – Attitudes towards Healthy Eating

Key points

Nutritional information still unclear to many

Figure 32: Attitudes towards healthy eating, November 2014

Half of people find it hard to keep track of their dietary intake

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: reports@mintel.com



Report Price: £1750.00 | \$2834.04 | €2223.04

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

Messages centred on speed and taste should boost healthy products

The Consumer – Attitudes towards Products with Health Claims/Benefits

Key points

Many believe health claims are made without scientific proof Figure 33: Attitudes towards products with health claims/benefits, November 2014

Functional labelling seen to lack clarity

A third of consumers prefer products naturally high in nutrients

Natural fortification

Three in 10 associate protein with satiety

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: reports@mintel.com