

Better-for-you Eating Trends: Spotlight on Real - US - September 2016

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.



"When seeking better-for-you foods, consumers avoid certain elements in their diets, chiefly artificial ingredients of all forms, and express a general distrust of genetically modified ingredients. At the same time, many consumers are seeking foods with added health attributes, namely protein, fiber, and whole grains."
- William Roberts, Jr Senior Food & Drink Analyst

This report looks at the following areas:

- Obesity, overweight statistics increase
- Traits consumers are avoiding
- Generations avoiding artificial
- Trust of on-pack claims

This Report assesses consumer attitudes and behaviors regarding foods positioned as better-for-you, seeking to establish what consumers mean by BFY and related topics, specifically "natural." This Report features topics and issues also addressed in the previous Mintel Reports *Free-from Food Trends – US, May 2015* and *The Organic Shopper – US, March 2015*.

Not addressed specifically in this Report, but discussed in their relationship to BFY food trends, are topics relating to *Gluten-free Foods – US, October 2015*, *Healthy Dining Trends – US, March 2016*, and *Diet Trends – US, October 2016*.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+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

Better-for-you Eating Trends: Spotlight on Real - US - September 2016

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

Overview

What you need to know

Definition

Executive Summary

The issues

Obesity, overweight statistics increase

Figure 1: Trends in obesity prevalence among adults aged 20 and over (age-adjusted) and youth aged 2-19 years: US, 1999-2000 through 2013-14

Traits consumers are avoiding

Figure 2: Avoiding in better-for-you foods, June 2016

Generations avoiding artificial

Figure 3: Avoiding in better-for-you foods, by generation, June 2016

Trust of on-pack claims

Figure 4: Trust of on-pack claims, June 2016

Genetic modification failing to resonate

Figure 5: Opinion of genetically modified foods, by household income, June 2016

The opportunities

Healthy traits consumers seek

Figure 6: Seeking in better-for-you foods, June 2016

Protein of interest to younger consumers, whole grains more to older

Figure 7: Seeking in better-for-you foods, by generation, June

Vegetarian options of notable interest to weight maintainers

Figure 8: Seeking in better-for-you foods, by dieting status, June 2016

Health claim interest increases with larger families

Figure 9: Attitudes toward BFY foods, by presence of children in the household, June 2016

What it means

Market Perspective

Consumers appear to associate organic with health

Figure 10: Percent change in natural supermarket sales of organic foods and beverages in selected categories, 2012-14

Market Factors

Obesity, overweight statistics increase

Figure 11: Trends in obesity prevalence among adults aged 20 and over (age-adjusted) and youth aged 2-19 years: US, 1999-2000 through 2013-14

Source: Centers for Disease Control and Prevention; National Center for Health Statistics, National Health and Nutrition Examination Survey/Mintel

New FDA nutritional guidelines

Modifying the genetically modified

Natural confusion

The FDA

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Better-for-you Eating Trends: Spotlight on Real - US - September 2016

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 USDA

The FTC

The TTB

Lack of definition leads to natural lawsuits

What's Available to BFY Consumers?

Allergen claims top launches

Figure 13: Top five claims on food products introduced in the US, 2013-16

Snacks stake claims

Figure 14: Top categories with new products introductions featuring free-from claims*, 2013-16

Snacks carry the most added-health claims

Figure 15: Categories with most added-health claims among product introductions*, 2012-16

Figure 16: Most popular added-health claims* in US food introductions, 2012-16

Environmental health leads natural claims

Figure 17: Most popular categories by number of US introductions with natural claims*, 2014-16

The Consumer – What You Need to Know

Local and fresh equate to health

Protein and whole grains of most interest to all generations

Consumers largely equate unprocessed with healthy

GM proponents not swaying consumers

Dads seek health help

Households with children looking to avoid sweeteners

Hispanics looking to avoid artificial

Opportunity for diet foods perceived as healthy

Sweeteners lead ingredients avoided

Overall Health Perceptions

Food's impact physically and emotionally

Figure 18: Impact of diet on consumer wellbeing, June 2016

Consumer attitudes toward healthy food

Figure 19: Attitudes toward BFY foods, June 2016

Traits consumers are avoiding

Figure 20: Avoiding in better-for-you foods, June 2016

Healthy traits consumers seek

Figure 21: Seeking in better-for-you foods, June 2016

Impact of claims on purchase

Vegetarian/vegan claims

GM

Organic

Natural

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Better-for-you Eating Trends: Spotlight on Real - US - September 2016

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 22: Attitudes toward BFY claims, June 2016

Local a key attribute ascribed to healthy food

Figure 23: Opinions of BFY foods, correspondence map, June 2016

Healthy foods must deliver on their promise

Figure 24: Attributes on purchase/behavior, June 2016

Trust of on-pack claims

Figure 25: Trust of on-pack claims, June 2016

Healthy at the opposite end of the spectrum from processed

Figure 26: Permissible foods, correspondence map, June 2016

Generational Health Perceptions

Tying experience to emotional wellbeing

Figure 27: Impact of diet on consumer wellbeing, by generation, June 2016

Guiding generations toward healthier options

Figure 28: Attitudes toward BFY foods, by generation, June 2016

Generations avoiding artificial

Figure 29: Avoiding in better-for-you foods, by generation, June 2016

Protein of interest to younger consumers, whole grains more to older

Figure 30: Seeking in better-for-you foods, by generation, June 2016

Interest in plant-based foods

Figure 31: Attitudes toward BFY claims, by generation, June 2016

Free-from claims and health

Figure 32: Opinions of BFY foods, by generation, June 2016

Possible confusion about health needs

Figure 33: Attributes on purchase/behavior, by generation, June 2016

General distrust of dietary claims

Figure 34: Trust of on-pack claims, by generation, June 2016

Interest in local slightly outweighs interest in functional

Figure 35: Permissible foods, by generation, June 2016

GM foods largely unappreciated

Figure 36: Less-suitable foods, by generation, June 2016

Health Perceptions Differ by Race

White consumer interest in serving sizes, Black consumers concerned about artificial

Figure 37: Attitudes toward BFY foods, by race, June 2016

Avoiding the sweet

Figure 38: Avoiding in better-for-you foods, by race, June 2016

Consumers seeking protein

Figure 39: Seeking in better-for-you foods, by race, June 2016

Challenges for natural claims

Figure 40: Attitudes toward BFY claims, by race, June 2016

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Better-for-you Eating Trends: Spotlight on Real - US - September 2016

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.

Unprocessed aligns more with healthy food

Figure 41: Opinions of BFY foods, by race, June 2016

Ancient grains of particular interest to White, Other races

Figure 42: Permissible foods, by race, June 2016

Artificial elements fail to resonate with consumers

Figure 43: Less-suitable foods, by race, June 2016

Income on Health Perceptions

Serving sizes of notable interest to higher incomes

Figure 44: Attitudes toward BFY foods, by household income, June 2016

HFCS of particular concern to low-income households

Figure 45: Avoiding in better-for-you foods, by household income, June 2016

Genetic modification failing to resonate

Figure 46: Attitudes toward BFY claims, by household income, June 2016

Figure 47: Opinion of genetically modified foods, by household income, June 2016

Free-from linked to healthy food

Figure 48: Opinions of BFY foods, by household income, June 2016

Lower-income groups regard their diets as less-healthy

Figure 49: Attributes on purchase/behavior, by household income, June 2016

Parents and Health

Parents less likely to equate diet and emotional/physical health

Figure 50: Impact of diet on consumer wellbeing, by parental status by gender, June 2016

Dads more likely to seek food with health claims

Figure 51: Attitudes toward BFY foods, by parental status by gender, June 2016

Parents, nonparents alike looking to avoid sugar

Figure 52: Avoiding in better-for-you foods, by parental status by gender, June 2016

Fathers interested in different positive healthy attributes

Figure 53: Seeking in better-for-you foods, by parental status by gender, June 2016

On-pack claims of greater interest to dads

Figure 54: Attitudes toward BFY claims, by parental status by gender, June 2016

Possible potential for healthy store brand among dads

Figure 55: Attributes on purchase/behavior, by parental status by gender, June 2016

Regulatory approval resonates much more strongly with dads

Figure 56: Trust of on-pack claims, by parental status by gender, June 2016

More Children in a Household Impacts Role of Health in Food

Health claim interest increases with larger families

Figure 57: Attitudes toward BFY foods, by presence of children in the household, June 2016

Households with children looking to avoid sweeteners

Figure 58: Avoiding in better-for-you foods, by presence of children in the household, June 2016

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Better-for-you Eating Trends: Spotlight on Real - US - September 2016

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.

Childless households more likely to seek added health benefits

Figure 59: Seeking in better-for-you foods, by presence of children in the household, June 2016

Interest in natural surges with presence of more children

Figure 60: Attitudes toward BFY claims, by presence of children in the household, June 2016

Consumers with younger children appreciate health claims

Figure 61: Attributes on purchase/behavior, by presence of children in the household, June 2016

Hispanic Health Perceptions

Hispanic parents feel slightly better about healthy choices for children

Figure 62: Impact of diet on consumer wellbeing, by Hispanic origin, June 2016

Healthy claims resonate more among Hispanics

Figure 63: Attitudes toward BFY foods, by Hispanic origin, June 2016

Hispanic consumers more likely to avoid artificial elements

Figure 64: Avoiding in better-for-you foods, by Hispanic origin, June 2016

Hispanic organic motivation appears largely unrelated to health

Figure 65: Seeking in better-for-you foods, by Hispanic origin, June 2016

Natural, organic largely describe healthy food

Figure 66: Opinions of BFY foods, by Hispanic origin, June 2016

Only a third of Hispanics regard their diet as healthy

Figure 67: Attributes on purchase/behavior, by Hispanic origin, June 2016

Dieting and Healthy Foods

Dieting consumers unlikely to say their diet is healthy

Figure 68: Impact of diet on consumer wellbeing, by dieting status, June 2016

Dieters avoiding artificial ingredients

Figure 69: Avoiding in better-for-you foods, by dieting status, June 2016

Vegetarian options of notable interest to weight maintainers

Figure 70: Seeking in better-for-you foods, by dieting status, June 2016

Serving sizes of notable interest to the weight conscious

Figure 71: Opinions of BFY foods, by dieting status, June 2016

Consumers Avoiding Artificial

Sweeteners among the leading ingredients consumers avoid

Figure 72: Avoiding artificial in better-for-you foods, by generation, June 2016

Other races avoiding artificial

Figure 73: Avoiding artificial in better-for-you foods, by race, June 2016

Parents avoiding sweeteners, whether artificial or not

Figure 74: Avoiding artificial in better-for-you foods, by parental status by gender, June 2016

Appendix – Data Sources and Abbreviations

Data sources

Consumer survey data

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Better-for-you Eating Trends: Spotlight on Real - US - September 2016

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.

Consumer qualitative research

Abbreviations and terms

Abbreviations

Correspondence Analysis Methodology

Figure 75: Permissible foods, June 2016

Figure 76: Correspondence analysis – Food descriptions, June 2016

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com