

Report Price: £3085.18 | \$3995.00 | €3666.43

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



"Consumers express an interest in eating healthier foods, with half saying they are eating more such foods than a year ago. Taste and quality remain paramount in their choice of these foods. The true opportunity for BFY foods going forward would appear to be in foods that promise positive health benefits, while negating many of the negatives associated with healthy foods."

- Billy Roberts, Senior Food & Drink Analyst

This report looks at the following areas:

- Natural ambiguity
- Obesity, diabetes rise

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

+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: £3085.18 | \$3995.00 | €3666.43

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

Natural ambiguity

Figure 1: Healthy food associations, July 2017

Obesity, diabetes rise

Figure 2: Obesity, diabetes prevalence, US, 1997-2016

The opportunities

Creating healthy food with mass appeal

Figure 3: Purchase factors, TURF analysis, July 2017

Fresh appeal

Figure 4: Ranking food by health, July 2017

GMO awareness

Figure 5: Opinions of genetically modified foods, by age and gender, July 2017

What it means

Market Perspective

Natural tendencies

Regulatory inaction leads to uptick in natural lawsuits

Younger consumers investing in organic

Figure 6: Increasing organic/natural purchase, by age, April 2017

Restaurants/foodservice increasing healthful options

Market Factors

Nutrition fact panel confusion

Hispanics, particularly Millennials, seek healthy foods

Figure 7: US population by Hispanic origin, 2017

Rising obesity, diabetes statistics

Figure 8: Obesity, diabetes prevalence, US, 1997-2016

Legislation targets food deserts

Key Players - What You Need to Know

 ${\it Gluten-free\ claims\ plateau,\ GMO-free\ ones\ rise}$

Natural deselection

Weight and see

What's Working?



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



Report Price: £3085.18 | \$3995.00 | €3666.43

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

GMO-free claims rise, as gluten-free levels off

Figure 9: US food launches, by health-related claim, 2012-17

Figure 10: Foods with a GMO-free claim, by other health-related claims, 2012-17

What's Struggling?

Decline in natural claims

Figure 11: US food launches, by health-related claims in decline, 2012-17

Figure 12: Natural claims by leading health claims, 2012-17

Figure 13: evol Hawaiian Style Grilled Chicken

What's Next?

Weight management rediscovered

Figure 14: Share of respondents who diet, June 2016

Figure 15: Healthy Choice Power Bowls Chicken Sausage & Barley Bowl

The Consumer - What You Need to Know

Health's role in food purchase

Claims factor relatively little in purchase

What is a healthy food?

Less-processed foods regarded as healthier

Seeking the real

Transparency demands

GMO labeling desired

Negatives to overcome

Healthy Purchase Habits

Consumers factoring health in their food purchase

Figure 16: Healthy habits, July 2017

Strong interest in health among younger consumers

Figure 17: Healthy habits, by age, July 2017

Healthy foods of notable interest to parents

Figure 18: Healthy habits, by parental status, July 2017

Underweight consumers even more motivated by health

Figure 19: Healthy habits, by body mass index, July 2017

Hispanics – particularly Millennials – seeking healthy foods

Figure 20: Healthy habits, by Hispanic origin, July 2017

Purchase Factors

Relatively little impact of product claims on healthy food purchase

Figure 21: Purchase factors, July 2017

Taste, ingredients of less interest to young men when buying healthy

Figure 22: Purchase factors, by age and gender, July 2017

Creating a mass-appeal healthy 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 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com



Report Price: £3085.18 | \$3995.00 | €3666.43

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

Figure 23: Purchase factors, TURF analysis, July 2017

Information Source

Food package, a resource for information

Figure 24: Information source for BFY trends, July 2017

On-pack and online resonate with younger consumers

Figure 25: Information source for BFY trends, by age, July 2017

Obese consumers more likely to get information from physicians

Figure 26: Information source for BFY trends, by body mass index, July 2017

Online, packaging key among parents' many information sources

Figure 27: Information source, by presence and age of children in household, July 2017

Health sites, friends factor prominently in Hispanic health eating choices

Figure 28: Information source for BFY trends, by Hispanic millennials, July 2017

Defining Healthy Foods

Natural and fresh resonate more than organic

Figure 29: Attributes of healthy versus unhealthy foods, July 2017

Local factors in some healthy perspective

Figure 30: Specific attributes of healthy foods, by age and gender, July 2017

The disadvantage of artificial

Figure 31: Attributes of unhealthy foods, by age and gender, July 2017

Some avoidance unrelated to health

Figure 32: Attributes of healthy foods, by Hispanic origin, July 2017

Figure 33: Attributes of unhealthy foods, by Hispanic origin, July 2017

Healthy Foods

Fruit, fish factor strongly among healthy foods

Figure 34: Ranking food by health, July 2017

Hispanic Millennials associate a host of foods with health

Figure 35: Ranking food by health, by Hispanic origin, July 2017

Opinions of Better-for-You

Growth will require convincing skeptical consumers

Figure 36: BFY opinions, July 2017

Home-cooked resonates

Figure 37: BFY opinions of healthy foods, by age, July 2017

When less is more

Figure 38: BFY opinions of healthy foods, by parental status, July 2017

Trust key to health-minded Hispanic consumers

Figure 39: BFY opinions of healthy foods, by Hispanic origin, July 2017

On-pack Health Information

Brands facing a need for greater transparency

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



Report Price: £3085.18 | \$3995.00 | €3666.43

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

Figure 40: BFY opinions of on-pack information, by age, July 2017

Claim trust leads to Hispanic Millennial purchase

Figure 41: BFY opinions of on-pack information, by Hispanic origin, July 2017

Opinions of Genetically Modified Foods

Consumers want to know the GMO

Figure 42: Opinions of genetically modified foods, by age and gender, July 2017

Parents opposed to GM ingredients

Figure 43: Opinions of genetically modified foods, by parental status, July 2017

Hispanic Millennials would forgo GM ingredients

Figure 44: Opinions of genetically modified foods, by Hispanic origin, July 2017

Negatives Associated with Health Foods

Younger consumers see notable shortcomings in healthy foods

Figure 45: Negatives and health foods, by age, July 2017

Parents see significant challenges to healthier foods

Figure 46: Negatives and health foods, by parental status, July 2017

Authenticity possibly a route to health

Figure 47: Negatives and health foods, by Hispanic origin, July 2017

Consumer Segmentation – Better-for-You

The cluster process

Figure 48: Better-for-you consumer segments, July 2017

Group 1: Health contents

Demographics

Characteristics

Opportunities

Figure 49: BFY consumer clusters, by opinions of genetically modified foods, July 2017

Group 2: Negative noters

Characteristics

Opportunities

Figure 50: BFY consumer clusters, by opinions of health foods, July 2017

Group 3: GM avoiders

Characteristics

Opportunities

Figure 51: BFY consumer clusters, by eating healthy, July 2017

Appendix - Data Sources and Abbreviations

Data sources

Consumer survey data

Consumer qualitative research

Abbreviations

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



Report Price: £3085.18 | \$3995.00 | €3666.43

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

Abbreviations

Appendix - The Consumer

Figure 52: Opinions of health and diet, by gender, fall 2016

Figure 53: Opinions of health and diet, by age, fall 2016

Figure 54: Opinions of health and diet, by race, fall 2016

Figure 55: Opinions of health and diet, by Hispanic origin, fall 2016

Figure 56: Opinions of health and diet, by household income, fall 2016

Figure 57: Opinions of health and diet, by education, fall 2016

Figure 58: Opinions of health and diet, by presence and number of children, fall 2016

Figure 59: Opinions of health and diet, by region, fall 2016

Appendix - TURF Analysis

Methodology

Figure 60: TURF analysis – Important attributes, June 2017

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com