

## Free-from Food Trends - US - October 2017

Report Price: £2982.01 | \$3995.00 | €3381.30

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



"Consumers are embracing free-from claims on foods, but not all are perceived or accepted equally. The broader trend is guided by those seeking sustained overall wellness. The strong interest in options free of artificial elements and that avoid high-fructose corn syrup and genetic modification, suggests that consumers' true aim is to find options that are "real" and natural. "

**- Billy Roberts, Senior Analyst – Food and Drink**

This report looks at the following areas:

- Avoidance largely tied to lifestyle choice
- Free-from options widely shopped
- Lack of trust in manufactured foods
- Consumers as likely to cook free-from options from scratch

The purpose of this Report is to assess consumer attitudes and behaviors regarding foods bearing a "free-from" claim, meaning a processed food that claims to be free of one or more of the following:

- GMOs
- Allergens
- Sodium
- Nitrates/nitrites
- Hormones
- Lactose

This Report follows up on Free-from Food Trends – US, May 2015, as well as Gluten-free Foods – US, October 2016, which exclusively evaluates the market for foods and beverages without (or with lowered amounts of) wheat and gluten.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://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](mailto: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

# Free-from Food Trends - US - October 2017

Report Price: £2982.01 | \$3995.00 | €3381.30

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

Avoidance largely tied to lifestyle choice

Figure 1: Foods/ingredients avoided, August 2017

Free-from options widely shopped

Figure 2: Purchase location, August 2017

Lack of trust in manufactured foods

Figure 3: Attitudes toward free-from foods, August 2017

Consumers as likely to cook free-from options from scratch

Figure 4: Opinions, by age, August 2017

The opportunities

Consumers associate short ingredient legends with healthier foods

Figure 5: Attitudes toward free-from foods, by age, August 2017

Convenient and lower-cost options could resonate with the category's key consumer

Figure 6: Opinions, by age, August 2017

Parental potential for convenient allergen-friendly options

Figure 7: Opinions, by presence and age of children under 18, August 2017

What it means

### Market Perspective

Brands, both retail and foodservice, eliminating artificial and unhealthy elements

### Market Factors

Food allergy reactions rising

Hispanics, particularly Millennials, seek healthy foods

Figure 8: US population by Hispanic origin, 2017

Diabetes, prediabetes numbers rise

Heart concerns associated with sodium

Figure 9: % of deaths caused by heart disease, 2013

### Key Players – What You Need to Know

New products avoid artificial ingredients, allergens

Avoiding fear

### What's In?

Launches avoiding allergens, GMO, artificial ingredients

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Free-from Food Trends - US - October 2017

Report Price: £2982.01 | \$3995.00 | €3381.30

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

Figure 10: Top free-from claims among US food/beverage introductions, 2012-17

## What's Next?

Increasing transparency

Figure 11: Emerging free-from claims among US food/beverage introductions, 2012-17

## The Consumer – What You Need to Know

Eliminating allergens, but mostly GMOs and HFCS

Artificial avoidance

Mass merchandisers rival supermarket for free-from options

Niche claims coming into their own

Hispanic Millennials express strong interest in ingredient transparency

Consumers likely turn to scratch cooking to avoid certain elements

## Foods/Ingredients Avoided

HFCS, GMOs rank as most avoided

Figure 12: Foods/ingredients avoided, August 2017

Younger consumers much more likely to avoid allergens

Figure 13: Foods/ingredients avoided, by age, August 2017

Presence of children factors strongly in allergen avoidance

Figure 14: Allergens avoided, by number of children under 18 in household, August 2017

Education and HFCS avoidance

Figure 15: Ingredients avoided, by level of education, August 2017

Black consumers much more likely to avoid lactose

Figure 16: Foods/ingredients avoided, by race, August 2017

Hispanics, particularly Millennials, avoiding allergens

Figure 17: Allergens avoided, by Hispanic origin, August 2017

Supermarkets top resource for GMO- and HFCS-free

Figure 18: Foods/ingredients avoided, by purchase location, August 2017

## Important Free-from Claims

Artificial-free important to consumers

Figure 19: Claim importance, August 2017

Older consumers avoiding sugar, sodium

Figure 20: Claim importance, by age, August 2017

Parents avoiding artificial and GMOs

Figure 21: Claim importance, by presence and age of children in household, August 2017

Black consumers avoiding sodium

Figure 22: Claim importance, by race, August 2017

Cage-free, lactose-free resonating with Hispanic Millennials

Figure 23: Claim importance, by Hispanic origin, August 2017

## Purchase Location for Free-from Foods

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

# Free-from Food Trends - US - October 2017

Report Price: £2982.01 | \$3995.00 | €3381.30

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

Consumers turning to mass merchandisers for free-from foods

Figure 24: Purchase location, August 2017

Older consumers more likely to buy free-from from supermarkets

Figure 25: Purchase location, by age, August 2017

Financial 'health' factoring strongly in free-from retailer choice

Figure 26: Finance tracker, by purchase location, August 2017

Parents turning to mass merchandisers for free-from options

Figure 27: Purchase location, by parental status, August 2017

Food-allergic turning to mass merchandisers

Figure 28: Foods/ingredients avoided, by purchase location, August 2017

## Possibly Emerging Free-from Claims

Consumers seeking to avoid hormones, antibiotics in food

Figure 29: Other free-from claims of interest, August 2017

Older consumers interested in MSG-free

Figure 30: Other free-from claims of interest, by age, August 2017

Hormone-free claims would resonate strongly with Hispanic consumers

Figure 31: Other free-from claims of interest, by Hispanic origin, August 2017

Multiple free-from claims could garner consumer interest

Figure 32: Other free-from claims of interest, TURF analysis, August 2017

## Attitudes toward Free-from Foods

Consumers wary of food ingredients

Figure 33: Attitudes toward free-from foods, August 2017

Financially 'healthy' consumers may question free-from foods

Figure 34: Finance tracker, by attitudes toward free-from foods, August 2017

Ingredient transparency resonating with Hispanic Millennials

Figure 35: Attitudes toward food ingredients, by Hispanic origin, August 2017

## Interest in Ingredient Disclosure

Parents seeking easy-to-find product information

Figure 36: Attitudes toward ingredient information, by presence and age of children under 18, August 2017

Hispanics appear wary of manufactured foods

Figure 37: Attitudes toward ingredient information, by Hispanic origin, August 2017

## The Challenge of Purchasing and Preparing Free-from Foods

Expense, ingredient legends may be impacting free-from sales

Figure 38: Opinions of free-from purchase and preparation, August 2017

Free-from price weighing heavily on younger consumers

Figure 39: Opinions of free-from purchase and preparation, by age, August 2017

Allergen-free lunch options could resonate strongly with Hispanic Millennials

Figure 40: Purchasing free-from foods, by Hispanic origin, August 2017

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Free-from Food Trends - US - October 2017

Report Price: £2982.01 | \$3995.00 | €3381.30

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

Consumers who shop multiple stores show strong interest in transparency

Figure 41: Attitudes toward free-from foods, by repertoire of purchase location, August 2017

### Preparing Free-from Meals

Customizable free-from options could resonate

Figure 42: Preparing free-from meals, by age, August 2017

Free-from with wide appeal would resonate with parents

Figure 43: Preparing free-from meals, by presence and age of children under 18, August 2017

Financially secure consumers more apt to avoid prepared free-from options

Figure 44: Finance tracker, by opinions of preparing free-from meals, August 2017

Hispanic non-Millennials likely to address free-from needs through from-scratch preparation

Figure 45: Preparing free-from meals, by Hispanic origin, August 2017

### Appendix – Data Sources and Abbreviations

Data sources

Consumer survey data

Consumer qualitative research

Abbreviations

Abbreviations

### TURF Analysis – Free-from Food Trends – October 2017

Methodology

Figure 46: Table – TURF analysis – Other free-from claims of interest, August 2017

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)