

Gluten-free Foods - US - October 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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



"Despite a decline in the number of gluten-free consumers, there is a generally positive opinion of gluten-free foods. Consumers consider the claim to indicate the product is healthy and beneficial to all, not solely those who have celiac disease or a gluten intolerance."

– **William Roberts, Jr, Senior Food & Drink Analyst**

This report looks at the following areas:

The challenge for the category is in overcoming an established reputation of being both expensive and an often poor imitation of regular foods. However, recent innovations including novel flour concepts have led to gluten-free products virtually on par with their gluten-containing counterparts

- Fewer consumers eating gluten-free foods
- Affordability not a significant factor in gluten-free's decline

**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

Gluten-free Foods - US - October 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Fewer consumers eating gluten-free foods

Figure 1: Consumption of gluten-free foods, June 2016 versus July 2018

Affordability not a significant factor in gluten-free's decline

Figure 2: Opinions of the affordability of gluten-free foods, July 2018

The opportunities

Leveraging gluten-free's healthy reputation

Figure 3: Opinions of the health of gluten-free foods, July 2018

Significant interest among consumers yet to try gluten-free

Figure 4: Consumers who do not eat gluten-free foods but who are interested in trying, July 2018

Adding variety

Figure 5: Gluten-free introductions in the US, by category, 2016-18*

What it means

The Market – What You Need to Know

Downturn for gluten-free

Defending gluten-free

Market Perspective

Gluten-free popularity begins to wane

Figure 6: Consumption of gluten-free foods, June 2016 versus July 2018

Market Factors

Gluten-free facing a degree of backlash

Key Players – What You Need to Know

Leveraging gluten-free's natural appeal

Decline in gluten-free snacks

Gluten-free as a supportive claim

What's In?

Avoiding artificial with natural elements

Figure 7: Gluten-free food introductions in the US, by claim, 2013-18*

Figure 8: GMO-free gluten-free introductions in the US, 2017-18

What's Out?

Gluten-free snack launches decline dramatically

**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

Gluten-free Foods - US - October 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 9: US gluten-free product introductions, by category, 2015-18*

Figure 10: Gluten-free snack introductions in the US, 2017-18

What's Next?

Promote gluten-free's potential in other trending diets

Figure 11: Gluten-free paleo/keto-friendly introductions in the US, 2017-18

The Consumer – What You Need to Know

Declining consumption but some potential

Younger consumers purchasing gluten-free from a variety of retailers

Simple ingredient legends could appeal

Even loyalists not seeking gluten-free claims on all foods

Notable interest in gluten-free variety among lower-income consumers

Leveraging positive gluten-free reputation among younger consumers

Sizable portion of consumers see gluten-free as a fad

Trust much more pronounced among category loyalists

Consumption of Gluten-free Foods

Notable decline in gluten-free consumers

Figure 12: Consumption of gluten-free foods, June 2016 versus July 2018

Even among gluten-free loyalists, consumption falls

Figure 13: Consumers eating less gluten-free compared to one year ago, July 2018

Lower-income consumers showing gluten-free interest

Figure 14: Consumption of gluten-free foods, by select demographics, June 2016 versus July 2018

Slight potential to reach gluten-free holdouts

Figure 15: Consumers who do not eat gluten-free foods, July 2018

Interest in trying skews strongly younger

Figure 16: Consumers who do not eat gluten-free foods but who are interested in trying, July 2018

Gluten-free Purchase Location

Supermarkets, mass merchandisers most likely locations for purchase

Figure 17: Gluten-free food purchase location, July 2018

Younger consumers purchasing from variety of locations

Figure 18: Gluten-free food purchase location, by age, July 2018

Reasons for Eating Gluten-free

Health drives consumption

Figure 19: Reasons for eating gluten-free, July 2018

Claims with Potential in Gluten-free Foods

Protein, natural resonate among gluten-free consumers

Figure 20: Claims of interest in gluten-free foods, July 2018

Notable interest in gluten-free's health attributes among Hispanics

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

Gluten-free Foods - US - October 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 21: Claims of interest in gluten-free foods, by Hispanic origin, July 2018

Healthy, natural gluten-free option would have significant appeal

Figure 22: TURF analysis – Interest in types of gluten-free foods, July 2018

Opinions of Gluten-free Foods

Hit-and-miss interest even among category loyalists

Figure 23: Opinions of gluten-free foods, July 2018

Younger consumers more likely to seek other free-from claims, too

Figure 24: Opinions of gluten-free foods, by age, July 2018

Buying Gluten-free Foods

Gluten-free's expense may be taking a toll

Figure 25: Opinions of buying gluten-free foods, July 2018

Strong interest in variety of gluten-free among lower-income consumers

Figure 26: Opinions of buying gluten-free foods, any agree, by household income, July 2018

Figure 27: New gluten-free food launches, by category, 2018*

Health and Gluten-free

Gluten-free's positive health reputation

Figure 28: Opinions of the health of gluten-free foods, July 2018

Largely positive reputation among younger consumers

Figure 29: Opinions of the health of gluten-free foods, by age, July 2018

Opinions of Gluten-free's Popularity

Fad opinions remain consistent

Figure 30: Opinions of the popularity of gluten-free foods, July 2018

Trust in Gluten-free Claims

Trust notably more pronounced among gluten-free loyalists

Figure 31: Opinions of trust in gluten-free food claims, July 2018

Gluten-free Foods – Cluster Analysis

Figure 32: Gluten-free cluster group breakdowns, July 2018

Group 1: Free Fans

Demographics:

Characteristics:

Opportunities:

Figure 33: Attitudes toward nutritional value of gluten-free foods, by cluster, July 2018

Group 2: Gluten Forever

Demographics:

Characteristics:

Opportunities:

Figure 34: Attitudes toward nutritional value of gluten-free foods, by the Gluten Forever cluster, July 2018

**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

Gluten-free Foods - US - October 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Group 3: The Untested Interested

Demographics:

Characteristics:

Opportunities:

Figure 35: Attitudes toward nutritional value of gluten-free foods, by the Untested Interested cluster, July 2018

Figure 36: Past consumption of gluten-free foods, by interest in types of gluten-free foods, July 2018

Appendix – Data Sources and Abbreviations

Consumer survey data

Consumer qualitative research

Abbreviations

Abbreviations

TURF Analysis – Gluten-free Foods – Methodology

Figure 37: Table - TURF analysis – Interest in types of gluten-free foods, July 2018

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