



# The 'Free From' Food Trend

## A marketing Perspective



[www.bullseye.ie](http://www.bullseye.ie)

# The **14** Major Food Allergens

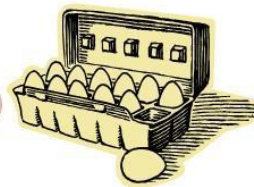
EU Regulation No 1169/2011

- Celery
- Cereals containing Gluten Protein found in wheat, rye, barley, Oats...etc
- Egg
- Fish / Shellfish
- Crustaceans
- Lupen – Garden flower
- Molluscs
- Milk / Lactose
- Mustard
- Peanuts / Ground nuts
- Nuts : almonds, walnuts, cashew nuts, Brazil nuts
- Sesame Seeds
- Soybeans
- Sulphites / Sulphur Dioxide

## THE BIG 8



Peanuts



Egg



Milk



Fish



Shellfish



Wheat



Soy



Tree Nuts

# New Labelling law...

EU Regulation No 1169/2011

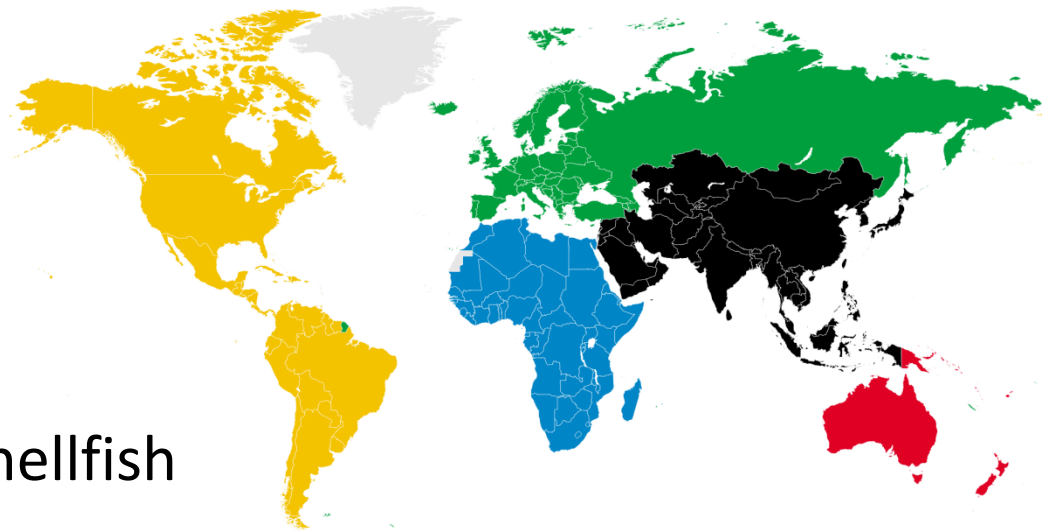
- Allergens must be **indicated in the list of ingredients** with a clear reference to the name of the allergen substance or product.
- The name of the allergen substance or product must be emphasised through a typeset that clearly distinguishes it from the rest of the list of ingredients, for example by means of **Bold font, font style or background colour**.
- Indication of allergens in an '**allergen box**' or allergen panel is not now permitted under FIC.
- Minimum **1.2mm font size**.

# EU Allergen Trends

- **17 million** Europeans suffer from food allergies
- **3.5 million** of them are less than **25 years of age**.
- The number of EU children with allergies has **DOUBLED** in the last **20 years**. ( +100% )
- Visits to A&E have increased **+700%** in the last **10 years**.
- The prevalence of allergies in children varies from 1.7% in Greece to 4% in Italy and Spain to **over 5%** in Ireland, France, UK, Netherlands and Germany.
- **60%** of allergic patients are **women** ( scientists suggest is probably because of biological and psychological factors ).
- Just **8 foods** account for **90%** of all reactions: Peanuts, milk, eggs, tree nuts, soy, wheat, fish and shellfish.

# Food Allergy prevalence by region....

- **Worldwide** – Milk, egg
- **USA, UK, Australia** – Peanuts and tree nuts
- **France** – Mustard seed
- **Italy, Spain** – Peach, apple, shellfish, fruit, vegetables
- **Israel** – Sesame
- **Spain, Japan** – Fish
- **Japan** – Buckwheat
- **Singapore** – Birds' nest, shellfish
- **Scandinavia** – Fish & Shellfish



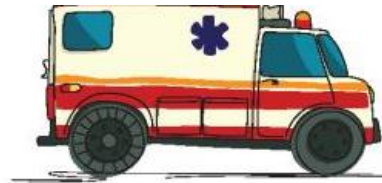
# Irish Allergy Trends

- **28 %** of the Irish population suffer some type of allergy
- **15%** need to see a specialist due to their condition.
- Food allergy is particularly common **amongst children**
- **1 in 50** Irish children have a life-threatening nut allergy.
- **10%** of children have more than one allergic disorder.
- Allergen prevalence has **DOUBLED in the last 20 years.**
- **30-35%** of Irish people at some stage in their lives suffer from some sort of allergy.

# US Allergen Trends

- Nearly **3% of adults** and **6% of young children** in the United States have one or more food allergies.
- At least **10% of children** from four large U.S. cities have a food allergy. ( Baltimore, Boston, New York City and St. Louis. )

**Every 3 minutes** a food allergy reaction sends someone to the **ER.**

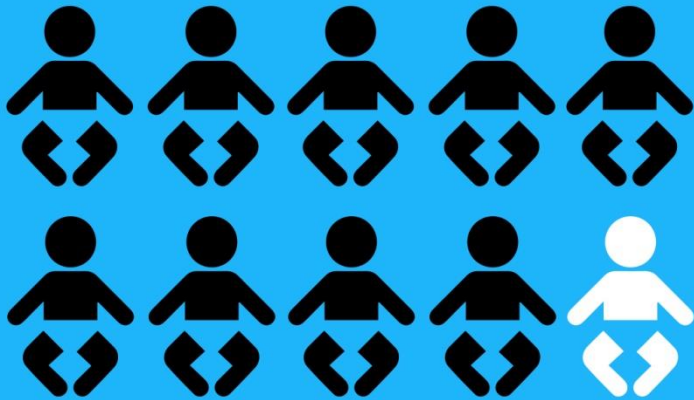


The number of people who have the disease is growing, increasing **50% among children** between **1997 and 2011.**

It now affects  
**1 IN 13**  
children







“1 IN 10 BABIES BORN  
IN AUSTRALIA TODAY  
WILL DEVELOP A  
FOOD ALLERGY”

## Australia

TRAVEL GUIDE





# Why?

- The theories behind this increase are speculative but include suggestions such as: Atmospheric pollution, greater use of detergents and chemicals, sterile cleaning products, carpets, curtains, soft furnishings and central heating in homes, overuse of antibiotics in infancy, & over **processed foods**.

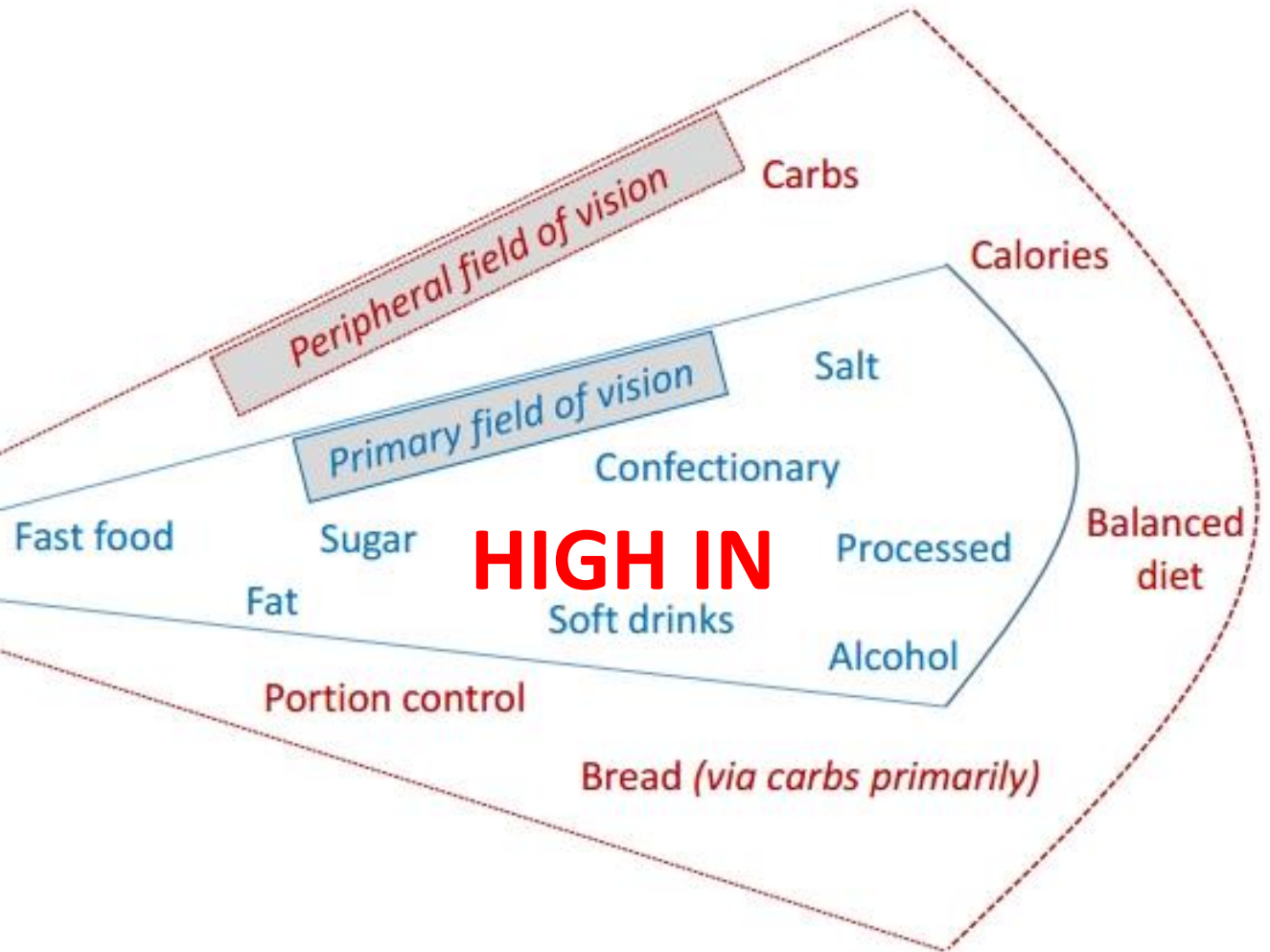


There is **no cure for food allergy**, but scientists are working to find treatments to prevent life-threatening reactions.

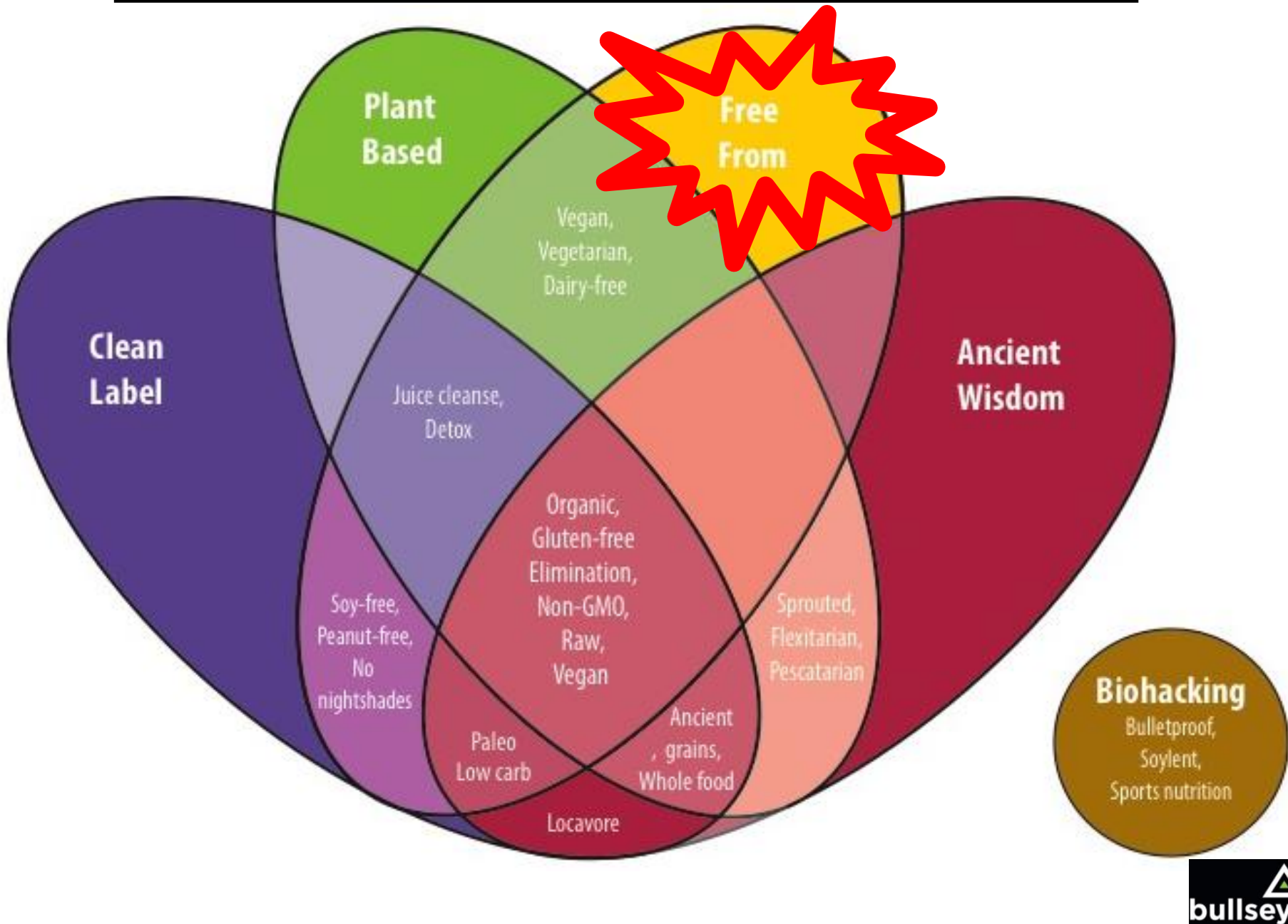
# How is this issue translating into Consumer Food Trends?



# Irish Consumer perceptions of 'Bad Food'



# Quest for 'Health & Wellness'



# TREND : 'Free From'





# 'Free From' / Clean Label Trend!

CLEAN LABELS = More Natural recipes with fewer ingredients!



- ♥ No Preservatives
- ♥ No Artificial Flavourings
- ♥ No Artificial Colourings
- ♥ Contains only the natural sweetness of fruit
- ♥ Gluten Free
- ♥ Egg & Soya Free
- ♥ Milk & Lactose Free



What's in my pot?

Lots of good ingredients...

Organic sweetcorn 46%  
Water  
Organic carrots 4.6%  
Organic fairtrade quinoa flakes 4%

but no bad ones...

No preservatives	Gluten free
No artificial additives	Egg free
No added salt or sugar	Dairy free
No bulking agent	Guilt free
No GM ingredients	



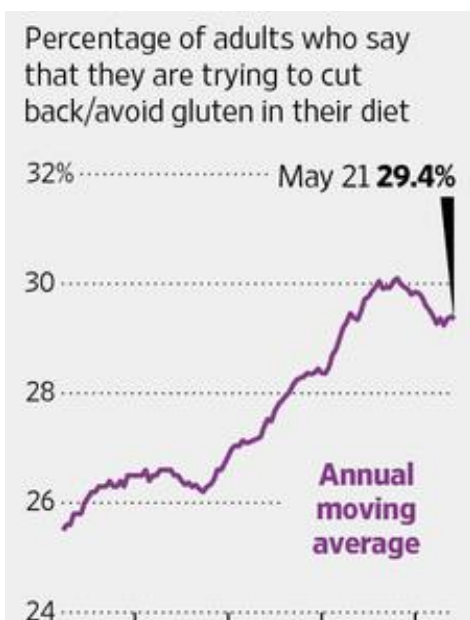
This Product is Free From

- |               |                                |
|---------------|--------------------------------|
| ✓ Added Salt  | ✓ Added Preservatives          |
| ✓ Added Sugar | ✓ GM Ingredients               |
| ✓ Colouring   | ✓ Antioxidants                 |
| ✓ Meat & Fish | ✓ Nuts & Seeds                 |
| ✓ Egg         | ✓ Fillers & Bulking Out Agents |

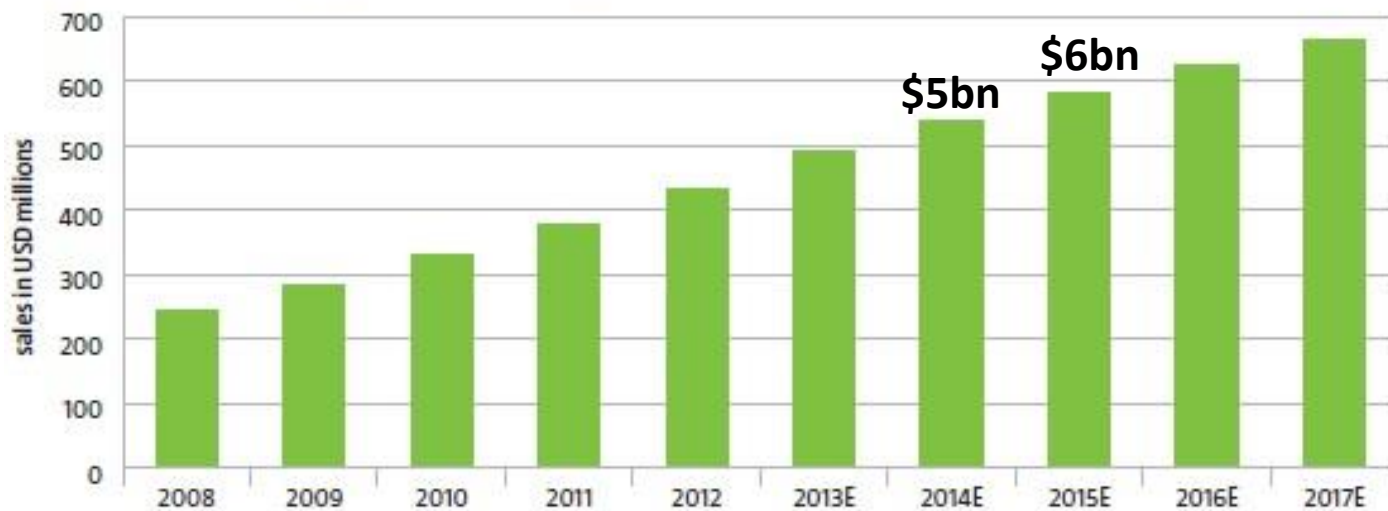
It Does Contain • Pasta, Milk, Cheese, Cream, Butter, Wheatflour, Mustard

# 'Free From' is a Mega trend!

- **'FREE FROM'** is currently the Fastest growing sector in retail food.
- 'Free From' Grocery Market in ROI valued at **€52m**. £355m in UK. (2016 Kantar).
- The **Free From** market in Ireland is now at **€60m+** in 2016. £530m in UK. (2016 Mintel)
- **300,000** Irish adults purchase 'Free From' foods regularly each week. (Bord Bia)



Projected sales of gluten-free food products in North America



Source: Euromonitor, Boulder Brands company reports; 2008–2012 CAGR 12.1%; 2012–2017E CAGR 8.9%



# Who's driving Free From foods?

- The Rise of the “**Health & Wellness**” worried shopper
- Growing trend towards viewing ‘normal foods’ as harmful or toxic or adulterated in some way.
- A Huge food industry sector has emerged in creating food products that are **Gluten or ‘Free From’**.
- **NB**: Consumers are aware of many of the ‘hot topic’ health terms and ‘buzzwords’, but they have a **very shallow knowledge** of what these issues are actually about and how/why they may impact on their health.
- The primary Gluten Free purchaser is the **50-65** AND the tech savvy “**millennial**” generation, aged between **25-35**.



# Quest for 'Health & Wellness'

## CONSUMER DRIVERS

Increasing availability of health information

Scientific advances

Growing pressure on healthcare resources

Increasing life expectancy

Rising prevalence of lifestyle diseases



## TRENDS

**Proactive prevention** **FUNCTIONAL**  
Proactively defending the body against future disease and illness through healthier choices

**Coping strategies** **FREE FROM**  
Using or excluding products in a response to modern day ailments

**Naturally good** **NATURAL**  
Searching for the best from nature to improve health

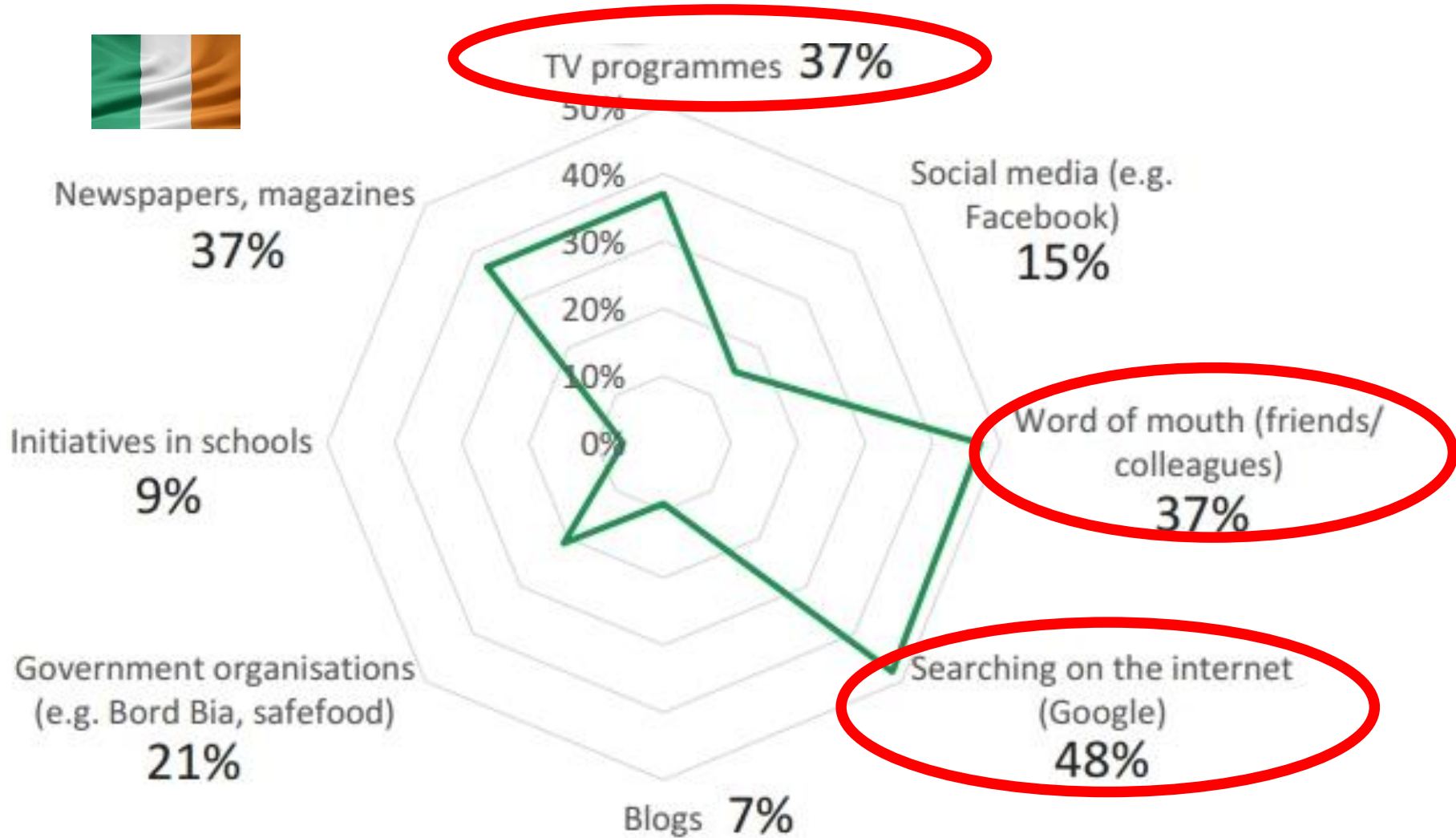
**Finding balance**  
Looking for emotional and mental balance via nutrition and lifestyle

**Image control**  
Managing weight and external appearance

**Good start**  
Ensuring children get the best start in life

*"I want a balanced approach to my health & wellness, to have **greater control** through the food choices I make"*

# Where do Irish consumers source their 'Healthy Food' Information



# TREND: 'Gluten Free'





# Gluten Free – Market Trends

( Gluten = A Protein found in Wheat, Barley & Rye )

- Coeliac Disease - Approx. **1%-2%** of the Irish Population
- Only about **5-10%** of these have been medically Diagnosed
- Yet, 'Gluten Free' consumer purchasers are up from 6% of population in 2010 to **26% in 2014!** ( Bord Bia )
- **59%** of these Irish purchasers said they buy Gluten Free products because they think they're **more 'healthy'**.
- The 'low Carb' **Atkins diet** peaked at **18%!**
- The Market now comprises of Coeliac Disease Sufferers **AND** healthy Lifestyle Choice consumers.
- 10% of consumers believe themselves that they are intolerant to certain foods including gluten. ( **Self-Diagnosis!** )
- **Clearly, More consumers believe themselves to be affected by Gluten than is really the factual medical case!**

# 26% of Irish shoppers Bought Gluten Free / Wheat Free in the last 12 months

( Up from 6% in 2010 )



**Total Irish Population = 4.6m ( 1.6m Households )**

# TREND: 'GMO Free'

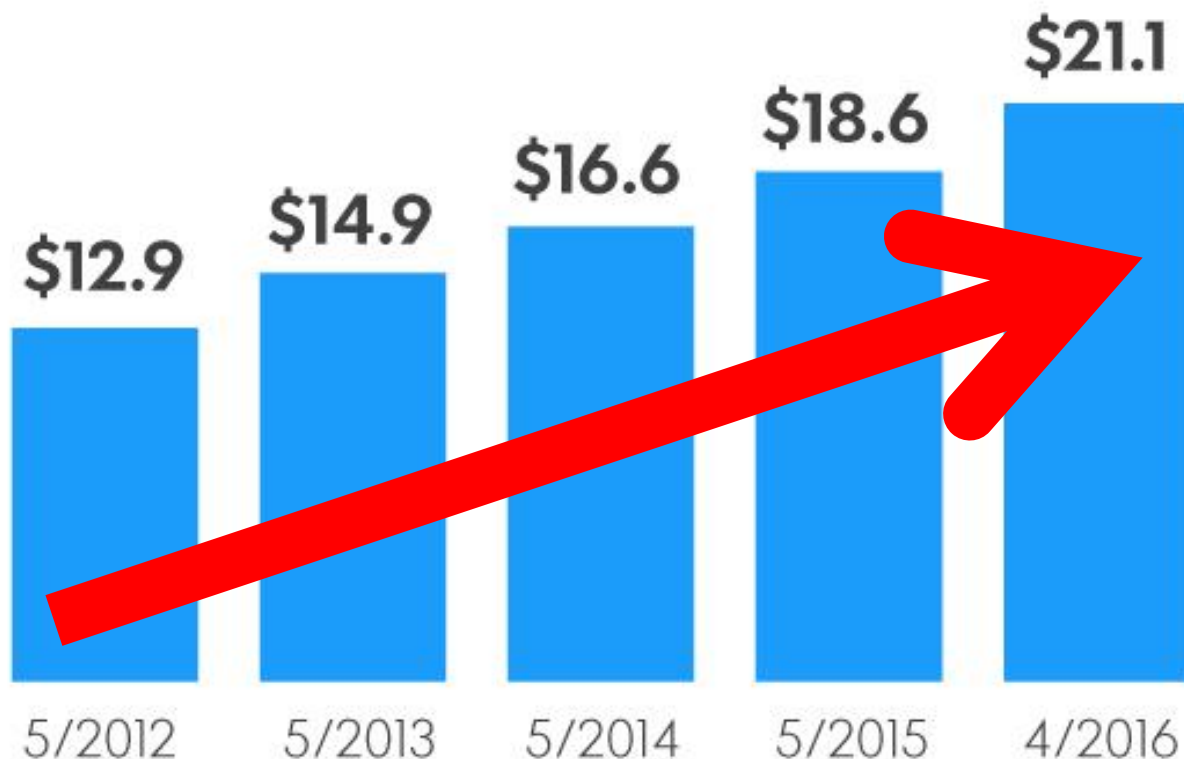






## SALES OF FOOD LABELED NON-GMO ARE RISING

There has been a steady increase in demand for foods labeled as non-GMO. A look at total sales, in billions:



NOTE: Totals are a 52 week period ending the first week of May or last week of April.

SOURCE: Nielsen

Frank Pompa, USA TODAY



# GMO FREE TREND

EU:



- The number of new GMO-free product launches increased by **+30%**: from **2,860** to **3,690**: Between 2013 to 2014.
- **87%** of consumers globally think non-GMO foods are ‘somewhat’, or ‘**a lot**’ **healthier**. ( Food navigator report 2016. )
- **28% of UK** consumers saying they are concerned about GMO's.

USA:



- Non-GMO food sales are at **\$21 billion per year**, and now number more than **29,500**. ( food processing report 2016 )
- Non-GMO foods will account for **30%** of US food and beverage retail sales by **2019** ( packaged facts report 2016 )
- **15.7%** of new US food products in 2015 made **non-GMO** claims in 2015 V's just **2.8% in 2012**.
- In **2015** New GMO Free food launches reached **2,000+**, up from just **200+** new products in **2005**.
- **63%** of US consumers think GMO foods they are “less safe to eat”. ( Health Focus International )
- **61%** of US consumers in 2016 say that GMOs impact their health **+10% from 2015**. (Natural Marketing Institute (NMI)).
- **Consumers** most concerned about GMOs in food are **mothers of young children** in their mid-30's living in urban middle class households.
- **Many Big brands now going GMO Free** : Cheerios, Grape Nuts, Smart Balance, Ben & Jerry's.

# Other 'Free From' Food Trends.....

- Artificial Additives
- Artificial Colourings
- Artificial Preservatives
- MSG – Mono sodium glutamate
- Refined Sugar
- Hydrogenated Fat
- Lactose
- Vegetarian / Meat Free
- Phosphates / Nitrates
- Trans Fatty Acids
- Dairy
- Low Salt
- Bulking Agents / Fillers
- High Fructose Corn Syrup (HFCS)
- Artificial Sweeteners
- Antibiotics / Hormones
- Refined / Bleached Flour
- Emulsifiers / Stabilizers
- Casein
- GMO FREE

# From a marketing perspective....

- Free From / healthier foods / GMO Free are **here to stay!**
- **Clean label** / 'free from' foods will take many new formats.
- The consumer desire to live 'healthier' and live longer has **never been stronger** & is here for good.
- Food NPD and Innovation will have to embrace this Free From '**Mega Trend**' to deliver consumer driven solutions.
- The '**HEALTH HALO**' EFFECT will remain a key driver of free-from foods uptake and has already resulted in a much larger group of users than the limited number of actual or suspected allergy or intolerance sufferers.
- **SELF DIAGNOSIS** will continue to be a driver: 18% of women say the reason they eat free-from foods is because they suspect they have an allergy or intolerance.
- **TIP**:.....Watch out for the Mega **GMO FREE trend!**

# THANK YOU!



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**SPARE UNUSED SLIDES**

# What is a food allergy?

- Food allergy occurs when a person's immune system **reacts inappropriately** to a digested food.
- The first stage of the process is called sensitisation – when the immune system's “memory” registers the eaten food as a **threat to the body**.
- Antibodies to that food are produced, and at a subsequent encounter, these antibodies connect with the food's **proteins** and trigger the release of certain substances in the body, such as histamine.
- This results in an **allergic reaction** in the body.
- The symptoms of a food allergy, may come on rapidly (usually within minutes but sometimes up to two hours).



# Signs and symptoms of **anaphylaxis**

swelling of the conjunctiva  
runny nose  
swelling of lips,  
tongue and/or throat

## **Heart vasculature**

- fast or slow heart rate
- low blood pressure

## **Skin**

- hives
- itchy skin
- flushing

pelvic pain

## **Central nervous system**

- light-headedness
- loss of consciousness
- confusion
- headache
- anxiety

## **Respiratory**

- shortness of breath
- wheezes or stridor
- hoarseness
- pain with swallowing
- cough

## **Gastrointestinal**

- crampy abdominal pain
- diarrhoea
- vomiting

loss of bladder control

