

Imperial College
London

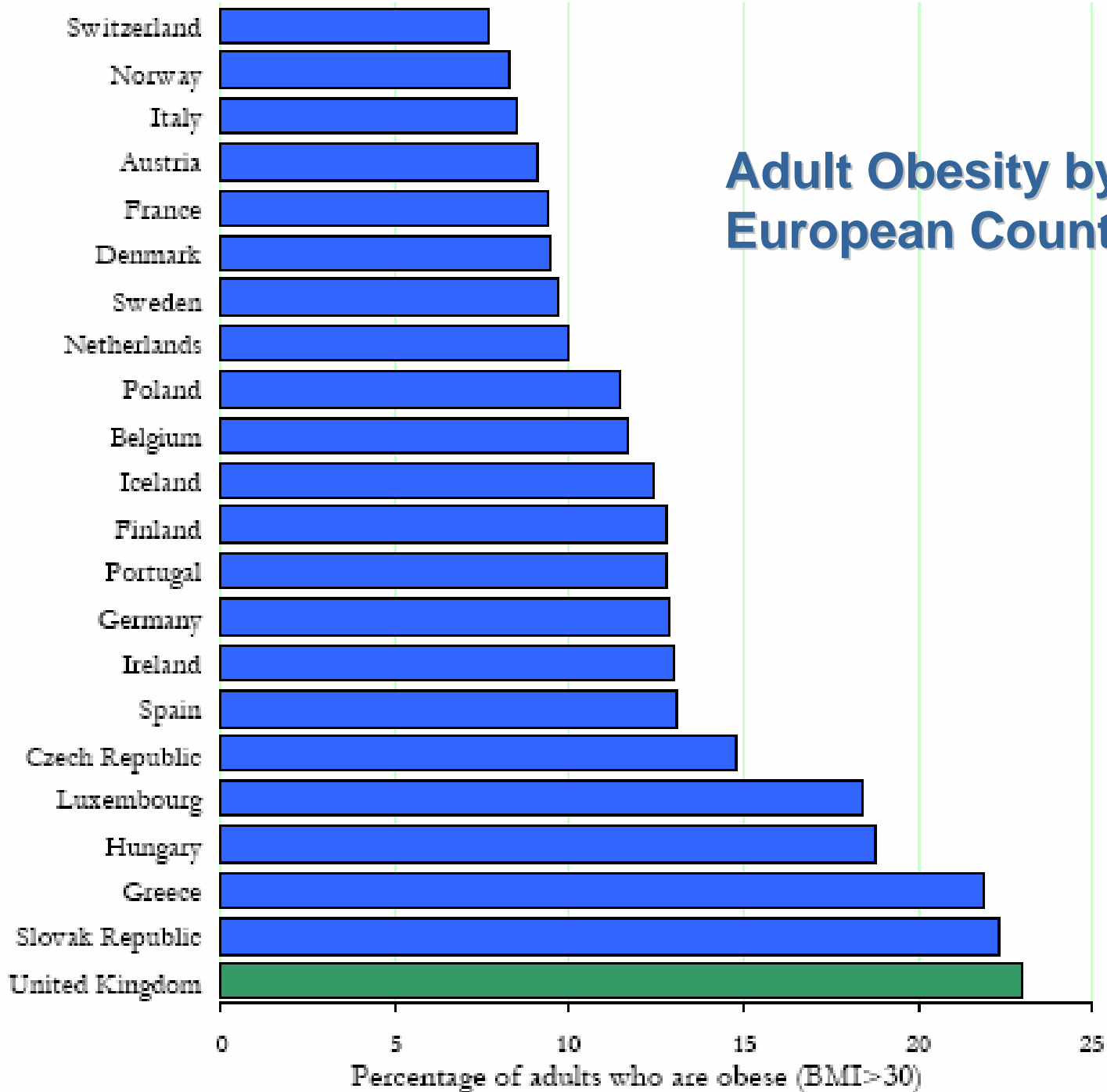
*Food and Beverage
Industry Responses to
some Key Health and Well-
Being Trends in 2007*

Dr David Hughes

Emeritus Professor of Food Marketing
Future Foods for Future Health Conference
2007

The Age Theatre, Melbourne Museum, Carlton
Sydney, Wednesday, July 25th, 2007

Adult Obesity by Selected European Countries, 2003



Category: Frozen Ready Meals -13.0%

Total retail value 2006 £435 million

Bird's Eye -20.8%



**Roast
Chicken
Dinner**

12 MINS

from frozen

100%

Chicken Breast

See side of pack for best before date



Category: Yogurt Drinks +6.5%

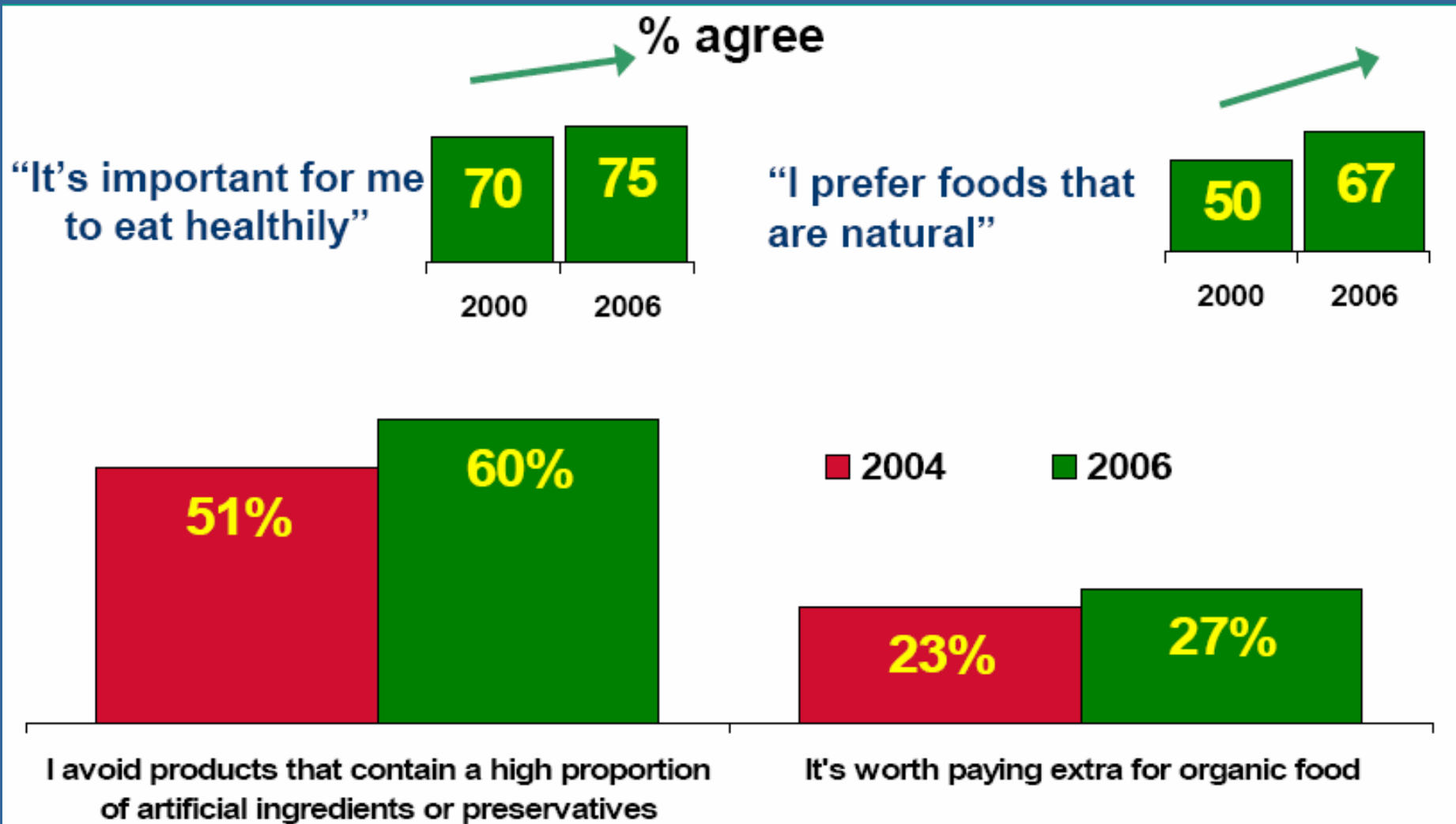
Total retail value 2006 £328 million

Müller Vitality +30.1%

Danone Actimel -5.4%



Changing Attitudes Towards Health



Eurobarometer Research on Health-Related Issues in the Food Industry

- Taste and pleasure top-of-mind for consumers when thinking of food. Only 1 out of 5 mention health
- Obesity acknowledged as a problem, but “not for me”
- Only 1 out of 5 respondents identified food safety issues spontaneously: food poisoning outside home, chemicals, pesticides, new viruses (AI), residues in meat
- Concerns about past food crises (e.g. BSE) waning
- But, 1 out of 2 consumers changed eating habits to become “healthier”



"We want to grow from the respected and trustworthy food company that we are known as now, into a respected and trustworthy food, nutrition and wellness company"

Peter Brabeck-Letmathe

Blue Print for the Future, October 2001

The 100% breakfast

Quaker Oats and Tropicana have a lot in common.
They're both 100% pure and 100% natural.

Quaker Oats are 100% supergrain (the only wholegrain officially recognised to help lower cholesterol*).

While a 250 ml glass of Tropicana gives you 100% of your RDA of vitamin C.

So if you want a healthier start to the day, don't settle for anything less.



Is your breakfast as healthy as the 100% breakfast? Find out at www.healthierstart.co.uk

*As part of a diet low in saturated fat and a healthy lifestyle.



Get half your daily
fruit and whole
grains before
you're even out
of your slippers.

That's right. Half of the new U.S.D.A. recommended servings for fruit and whole grains can be satisfied with just a bowl of Quaker® Old Fashioned Oatmeal® and a glass of Tropicana Pure Premium® Orange Juice®. That ought to get you hopping.



Naked

FOOD-JUICE

I WANT FLAVOR

I NEED NUTRIENTS

FOR MY LIFE

Get Naked

Naked Fun

Our Roots

[Overview](#) | [Just Juices](#) | [Quenchers](#) | [Immunity](#) | [Superfoods](#) | [Proteins](#) | [Antioxidants](#) | [New Blends](#) | [Juice Process](#) | [Glossary](#)



JUST JUICES

Where it all began

Fabulous flavors guaranteed to deliver satisfaction from your buds to your toes.



QUENCHERS

Pure refreshing joy

Sunshine in a bottle that'll satisfy your thirst at it's worst.



IMMUNITY

Immune-boosting superstars

Classic favorites boosted with immune-enhancers like Vitamin C, Bioflavonoids, Rose Hips, and Zinc to keep you happy AND healthy.



SUPERFOODS

For advanced juice drinkers

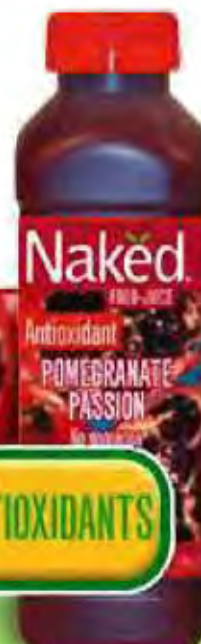
Enroll in the science of Superfood. From chlorella to spirulina- these juice blends pack maximum nutrition in a bottle. Pick from our power line-up and get ready for "Wow."



PROTEINS

Packed with protein power

So much more than soy- all eight amino acids plus great taste equals 34 grams of complete soy protein per bottle.



ANTIOXIDANTS

"Amped" up antioxidants

Loaded with zingers like Vitamins A, C, E and Selenium to zap zany free radicals- the only thing more impressive than their anti-ox power is the way they taste!

Propel

FITNESS WATER

[SIGN UP](#) | [ONLINE STORE](#) | [FAQ](#)

[WHY PROPEL?](#)

[FITNESS & HEALTH EXPERTISE](#)

[PROPEL YOUR WORKOUT](#)

[YOUR BONES YOUR BODY](#)

[GUNNAR ONE-ON-ONE](#)



PROPEL FITNESS WATER MADE FOR BODIES IN MOTION

- [▶ LEARN ABOUT PROPEL FITNESS WATER](#)
- [▶ LEARN ABOUT PROPEL CALCIUM](#)



FLAVORED RIGHT SO YOU HYDRATE BETTER

[SEE FLAVORS & SIZES](#) ▶

|| MELON ||

|| PEACH ||

|| GRAPE ||

|| LEMON ||

|| BERRY ||

|| BLACK
CHERRY ||

|| KIWI
STRAWBERRY ||

|| MIXED
BERRY
CALCIUM ||

|| MANGO
CALCIUM ||

|| MANDARIN
ORANGE
CALCIUM ||

"Changing the way you eat for good!"

THE FOOD DOCTOR™



Just Steam!

Tiger Prawns with Tomato and Basil

Wholewheat spaghetti, mixed peppers, The Food Doctor seed mix and fresh parsley.

*Designed to be nutritionally balanced
400g e

NB
No Preservatives
No Colourings

348
calories

NO
Preservatives
Colourings

DISPLAY UNTIL: 05 FEB
USE BY: 05 FEB
Keep refrigerated below 5°C



Introducing Tate & Lyle

rebalance™

A unique ingredient service – giving your brands
a healthier profile without compromising taste

Ten Health and Well-Being Trends Consolidating during 2007

- Satiety rules and heralds weight management era through appetite suppression
- Digestive health products head for mainstream, with bone and heart health in their slipstream
- Beauty “from within and without” complements health and well-being
- “It’s up to me!” – no silver bullet as common sense prevails (albeit reluctantly)
- Simple/natural ingredients & products blossom
- Guilt free snacking legitimised



Enjoy Longer Lasting Satisfaction



NEW Danone Shape 'Lasting Satisfaction'

With a total
launch package of
£5m!
including TV,
on air August 2006

- The first diet yogurt to offer consumers an **added health benefit**
- Contains a unique blend of **Effective Fibres and Proteins (EFP-)** proven to keep you feeling **satisfied for longer**
- A range of **delicious new flavours** in 5 pack varieties: Raspberry and Strawberry, Strawberry, Peach & Passion Fruit and Mango, Blackberry and Cherry, Banana and Apricot
- Since launch, **48% of sales incremental to the diet category***

* Source: AC Nielsen, Iamnicom, 15 weeks ending 15/7 vs previous 15 weeks.

Available in store now!



PinnoThin is vegetable oil derived from pinolenic acid (from the nuts of the native Korean pine tree *Pinus koraiensis*)



The HIE 2006 silver award winner is: PinnoThin™ The new unique breakthrough appetite suppressant from





Fabulesse™ is an all-natural, patent-protected emulsion of palm and oat oils for use in dairy products. It triggers the natural appetite control mechanism. By delaying the hunger signals that would normally be sent hours after a meal, consumers feel more satisfied than they would have been and eat less.



(www.lipton.ch/linea) states that

“catechins may support weight management and have a positive influence on the distribution of body fat”



MAN DISCOVERS PREBIOTIC INSIDE BOX.

(He didn't realise they'd
been there since 1926.)

It's true: a new study at the University of Reading has shown that whole grain is a natural prebiotic, which is good news for digestive systems. So get this Nestlé Whole Grain Cereal and give your family the breakfast they love plus the goodness of prebiotics.



MOTHER DISCOVERS PREBIOTIC ON SPOON.

(Truth is, they've been there all along.)

It's true: a new study at the University of Reading has shown that whole grain is a natural prebiotic, which is good news for digestive systems. So get these Nestlé Whole Grain Cereals and give your family the breakfast they love plus the goodness of prebiotics.





PlumSmart® delivers all the digestive benefits of prune juice, but is clear, tart-crisp, and refreshing. It tastes fantastic!



Food groups of fruits, vegetables and whole grains serve up plenty of fiber, so eat them in abundance.



THE FACTS

- 1 OPTIVITA CONTAINS OAT BRAN.
- 2 OAT BRAN ACTS LIKE A SPONGE, HELPING TO ACTIVELY REDUCE CHOLESTEROL.
- 3 IT'S UP TO YOU TO EAT IT.





MAYBE she's born with it
MAYBE she's born with it



M I L K
NATURALLY BEAUTIFUL

MAYBE she's born with it

MAYBE but she probably got it from the fridge.



Semi-skimmed milk isn't an obvious beauty treatment. However, with **less than 2% fat**, it's packed with essential **amino acids** and **minerals** that can help keep your hair looking and feeling great.

But you do need to drink it not shower with it.

GOOD FOR:

- HAIR
- SKIN
- TEETH
- SHAMPOOING

AS PART OF A HEALTHY BALANCED DIET.

NATURALLY BEAUTIFUL
M I L K

Danone Yoghurt: Beauty from the Inside Out!



OPEN HERE

**Jack
Klijn**

Rijk aan

- vitamine E
- magnesium
- fosfor

Bron van

- vitamine B2
- ijzer
- foliumzuur

BEAUTY *mix*



Vitamine B2 en E helpen je huid zijn
natuurlijke glans te behouden

Een heerlijke mix van amandelen, hazelnoten,
ananas, cranberry's en rozijnen

125g e



This is a mix of almonds, hazelnuts, pineapple, cranberries and raisins, and is claimed to be a good source of vitamins B2 and E, which help to enhance the skin's natural glow.



Using Fresh Fruits
and Vegetables

Twenty easy ways to lose 100 calories



An extra 100 calories here and there may not sound like a big deal if you are watching your weight. Yet if over the course of one year you saved yourself this number of calories each day, you could save 36,500 in total, which equates to dropping 10lb in weight.

- drop cereal and toast for muesli and fruit
- ditch croissant for poached egg, tomato and toast
- have baked potato with beans and salad, not cheese and butter
- eat a few chocolate buttons, not a chocolate slab
- Kit Kat + 2 servings fruit, rather than Mars Bar
- skinny rather than whole milk Cappuccino

For instance:

- Don't use the golf cart
- Don't use the elevator
- Get off one stop before ...
- No salt on the table
- One booze free day a week
- Choose a wine under 13% ABV

Riding on the Coat Tails of the Health and Well-Being Mega Trend

Sales and Sales Growth for Fresh Berries in the UK Retail Market, 2004-2006

€millions (% change y-o-y)

	2004	2005	2006
Strawberries	407	476 (17%)	510 (7%)
Raspberries	98	117 (20%)	150 (28%)
Blueberries	30	63 (110%)	98 (55%)
Blackberries	2	3 (88%)	4 (55%)
All Berry Fruit	549	677 (23%)	786 (16%)

Kids should drink bananas, not go bananas.



When we sat down to make some kids' smoothies, we kept it natural. The only ingredients we use are the finest crushed whole fruit and pure juice. That's it. 100% fruit, with none of those weird additives or added sugar that will have your little ones running riot. Just a full portion of fruit in every little carton, and a whole seven portions in every big carton.

innocent smoothies for kids. nothing but nothing but fruit.

Bursting with Fruit and Vegetable Goodness - Knorr Vie



A delicious “smoothie” style drink of **concentrated fruit and vegetable juices**



At least **half your daily recommended intake** of fruit and vegetables crammed into one mini bottle



THE CRANBERRY Ranks **Number 1**

IN ANTIOXIDANT AND ANTIADHESION BENEFITS

Thirty-five studies, worldwide consumer appeal and the support of the world's leading cranberry supplier place this berry healthily ahead of the rest.

FIGURE 1

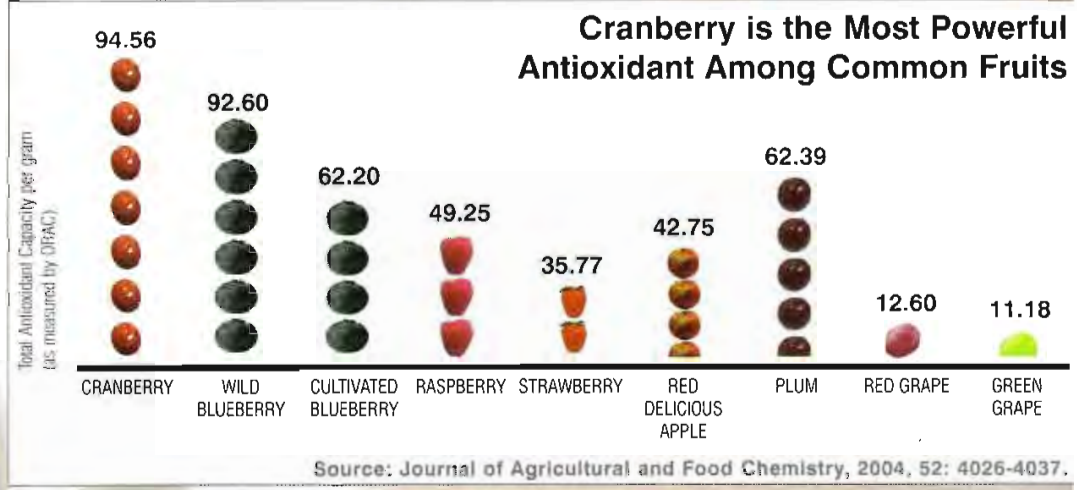
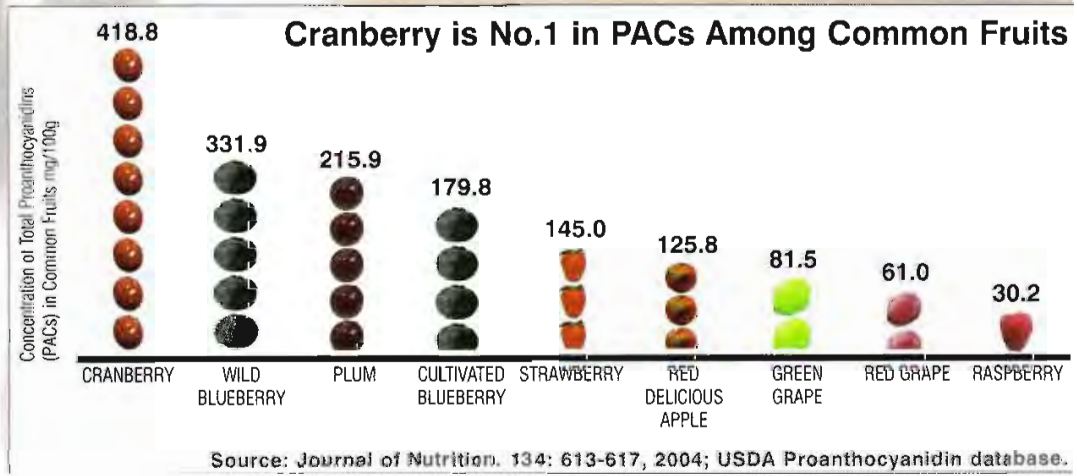


FIGURE 2



NEW THINSATIONS
RECOGNIZE A SIMPLE TRUTH.
SOMETIMES YOU JUST WANT TO
Eat The Whole Bag.



100 CALORIES
PER 23 GRAM PACK.







Ten Health and Well-Being Trends Consolidating in 2007

- Poor marketing communication and hyperbolic claims drives consumer confusion & scepticism
- Head for the Orient – rich legacy of functional foods in Asia
- “Free From” (dairy, gluten, meat, etc.) makes headway in every retail category
- Global health and well-being counts, too!:
 - environment
 - food miles evolving into carbon foot print
 - welfare of suppliers, animals, etc.



***Clarino*[™]CLA: can decrease body fat and help build lean muscle mass**

The raw material is safflower oil, a natural source of conjugated linoleic acid

CSPI to Sue Cadbury Schweppes over “All Natural” 7UP

High Fructose Corn Syrup Not Remotely Natural, Says CSPI



7UP Drops "All Natural" Claim

CSPI Praises Move and Drops Planned Lawsuit



“Do you trust nutritional claims made by food and drink companies?”

Percentage answering NO

Sweden	62
UK	56
Spain	54
Italy	51
France	45
Germany	44
Netherlands	39



FIRST PRODUCED
1935
IN JAPAN

Yakult[®]

with Lactobacillus

A healthy start

A healthy start

A healthy start

Yakult

Contains the active
L. casei Shirota.

Yakult

Contains the active
L. casei Shirota.

Yakult

Contains the active
L. casei Shirota.

100% natural
no artificial sweeteners
no artificial flavors
no artificial colors
Dietary fiber added

Adeez

The truth about soya

Did you know that Henry Ford was obsessed with soya?

Hmmmmmm. Soya?

Do you ever wonder about soya?

Soya isn't exactly a hot topic for most of us. Unless you follow a vegetarian diet - or you come from the Far East. These people really care about soya, because it is a great substitute for animal proteins. And because it is part of their national cuisine.

But soya isn't just about alternative lifestyles and Oriental food. More and more people are discovering what the Chinese have known for eons. Soya is not just good for us - it is also good for the farmer.





THE #1
NATIONAL
BESTSELLER!

Okuma's

Wu-Long™

Authentic Premium Chinese Slimming Tea



The World Famous Okuma's Wu-Long

- 氣** Centuries-old Chinese Slimming Secret.
Bencao Shiyi (The Compendium of Materia Medica)
- 氣** Burns 2.5 x More Calories than Green Tea.
University of Tokushima
- 氣** Reduces Fattening Effects of Carbs.
Suntory Research Center in Osaka, Japan
- 氣** Clarifies Skin, Giving it a Healthy Glow.
Archives of Dermatology, Shiga University of Medical Science
- 氣** Not Available in Stores.
Imported from Mt. Wu Yi Shan, China. Accept No Imitations!

Discover the Slimming Magic
of Okuma's Wu-Long Tea...



White Sliced Loaf

A gluten & wheat free white sliced loaf. Great for sandwiches!

IMPROVED RECIPE

C306 236A4

23110V05

400g e



- ✓ WHEAT-FREE
- ✓ GLUTEN-FREE
- ✓ MILK-FREE
- ✓ EGG-FREE



4 Croissants

Trufree white loaf 400g

£2.49



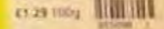
TEMPORARILY UNAVAILABLE

free from

gluten & egg free products

Dietary specials croissants 4x 225g

£2.89



B-B10 03 06



organic

Honeycomb

organic

Wheat free. Throat free. Virtually fat free.

The lovely honeycomb cake is made from whole eggs, flour, vanilla and lightly sweetened with 200g honey and is available in three flavours. It really takes for you to taste all the difference.

350g e

D:isions D:isions



eeny meeny miny mo

Now decaff coffee drinkers
have a real choice

Available from Waitrose and local independent food retailers.

SUSTAINABLE
ETHICAL
RESPONSIBLE

(AND IN CASE YOU WERE
WONDERING
EXCEPTIONALLY DRINKABLE)

New Kenco Sustainable Development is made with 100% Arabica beans giving an instant coffee with a rich full aroma and a smooth, superior taste. And it only uses beans from Rainforest Alliance Certified™ farms. So every time you help yourself to a cup, you help coffee farmers earn a decent living and conserve the environment.



Working with the Rainforest Alliance to share the pleasure of great coffee with the people who grow it.





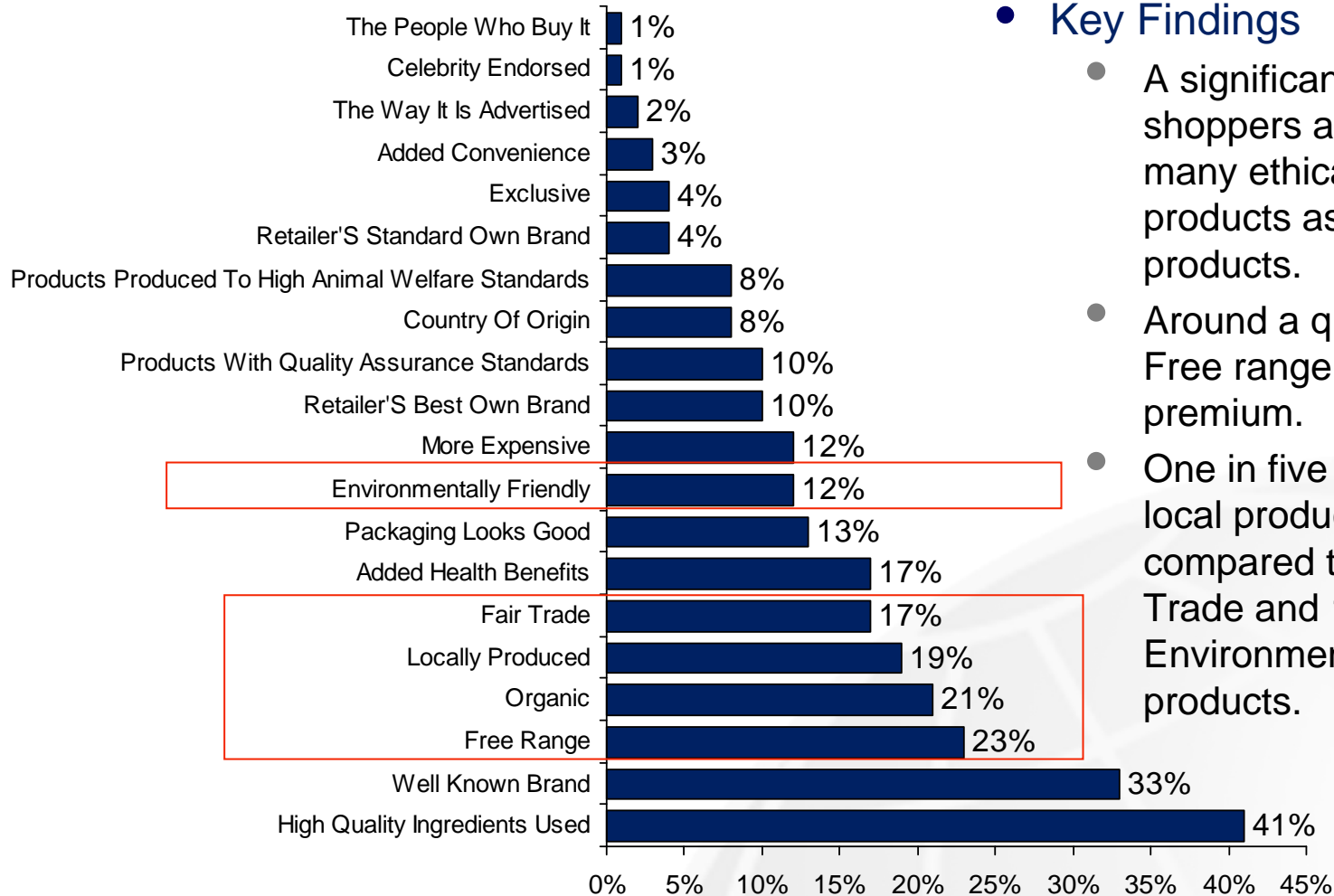
DANONE





Premium attributes

Thinking about food and drink products, which of the following would most make you think a product is a 'premium' product?



Key Findings

- A significant proportion of UK shoppers already associate many ethically sourced products as Premium products.
- Around a quarter associate Free range (23%) as premium.
- One in five (19%) associate local products as premium compared to 17% for Fair Trade and 12% for Environmentally friendly products.



Reasons for paying more for food and drink

Thinking about food and drink that you are willing to pay more for, what are the most important reasons for doing so?



Key Findings

- As many as 1 in 7 (14%) shoppers are willing to pay more for organic food
- 1 in 10 are willing to pay more for ethically produced goods and a similar number (9%) for goods that are better for the environment .

Marks & Spencer Heads for Carbon Neutral in 2012: the \$400 million Eco-Plan A (no Plan B!).

- ***Climate Change-related:***
 - more UK supply
 - double UK regional sourcing
 - grow existing local supply networks
 - working with suppliers to reduce carbon emissions
- ***Waste-related:***
 - reduce packaging by 25%
 - use sustainable/biodegradable material

M&S Eco-Plan A (continued)

- ***Raw materials and Suppliers***
 - only sell free range poultry and eggs (including In ingredients), and MSC fish/seafood
 - triple organic food sales
 - use LEAF and other green accreditations
 - reduction of water and chemical usage in growing
- ***Fair Treatment of Suppliers***
 - leader in supplier relationships
 - establish M&S supplier best practice exchange
- ***Healthy Eating***
 - add 1,500 healthy eating assistants in-store
 - “Eat Well” food products 50% of sales

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