

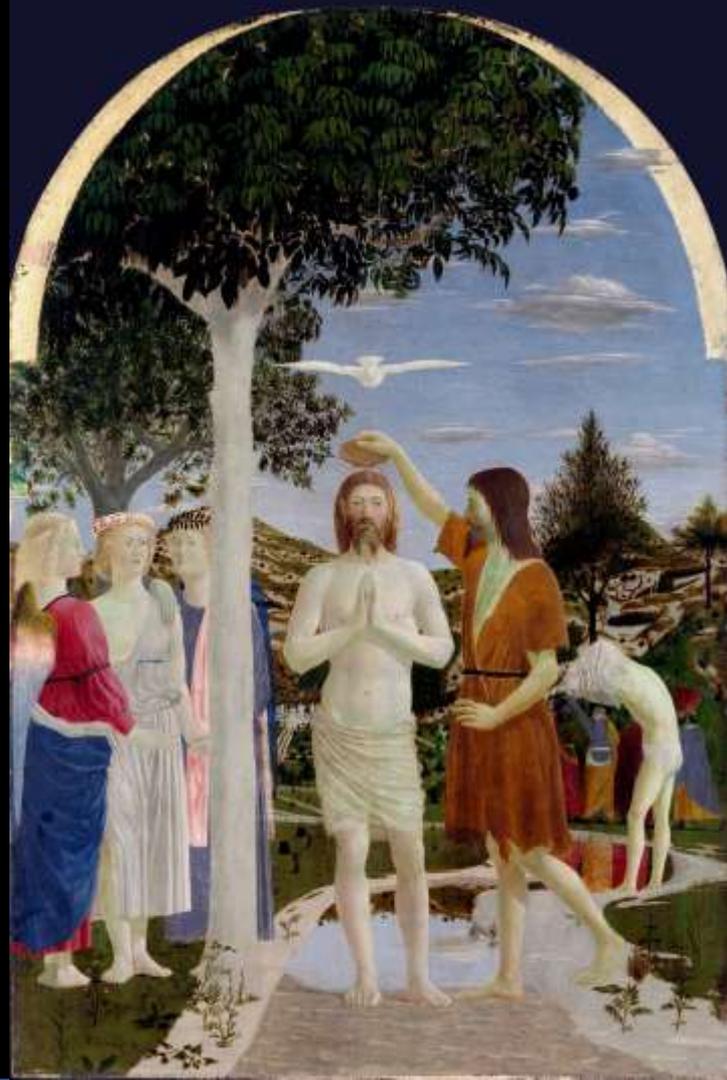
What does clean mean?

BORD BIA 
Thinking
House





BORD BIA 
**Thinking
House**







People

How To Sleep Clean: Sleep Hygiene For The New Year

You may have heard of the 'clean sleeping' trend, which was branded by Gwyneth Paltrow as the biggest health trend of 2017. Just like 2016's...

By Gemma Curtis





Global sales of clean label products is expected to reach \$180 bn by 2020

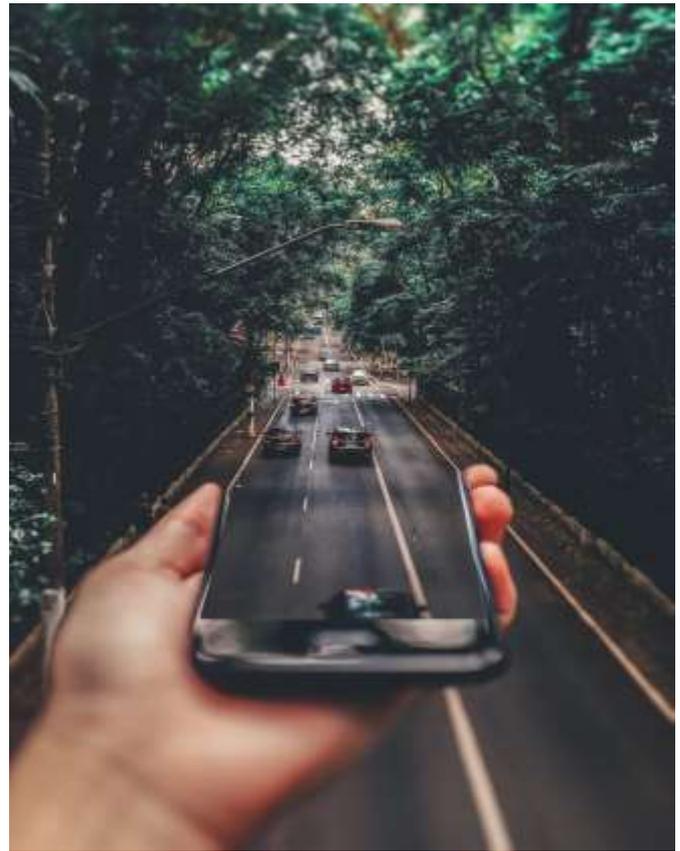


Background



Providing a road map for industry to highlight:

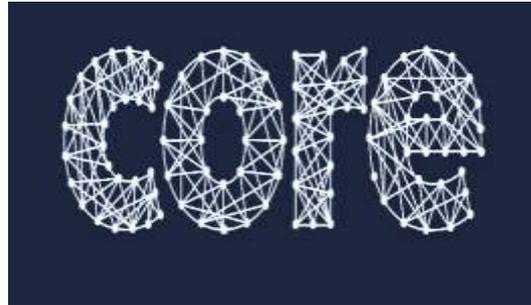
- clean growth opportunities
- provide potential product development territories now and into the future.



Unlocking
What
Clean
Means



Approach:



**Desk
Research**



**In-Depth
Interviews**



**International
Online Community**



**Robust multi-country
online study**

Stage details: Phase I



Desk Research

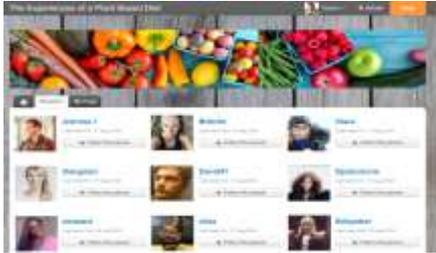
- Set the foundations of our understanding of label behaviours
- Help form basis on community and quantitative
- In-house and Bord Bia library sources



In-Depth Interviews

- Define the broad areas to explore in community and quantitative
- 1 x industry
- 1 x nutritionist

Stage details: Phase II



Online community

- 10 days of sharing
- 5 countries, 8 people per country
- Recruited according to “health” segment



Robust multi-country online study

- US, UK, Germany, Netherlands and Ireland
- N.9000 sample size
- Fieldwork 23rd April to 6th May 2019



Trust

BORD BIA 
Thinking
House

MİNTEL

34% trust the EU

To regulate
Safety standards
Of food and drink
Sold in
Germany

54% consumers
in the USA agree many
free from claims are not
meaningful to most food

FIELD INSIDER JOURNAL

67% people in France
agree
that companies
Are more interested in
making money than
making high quality food
and drink

MİNTEL



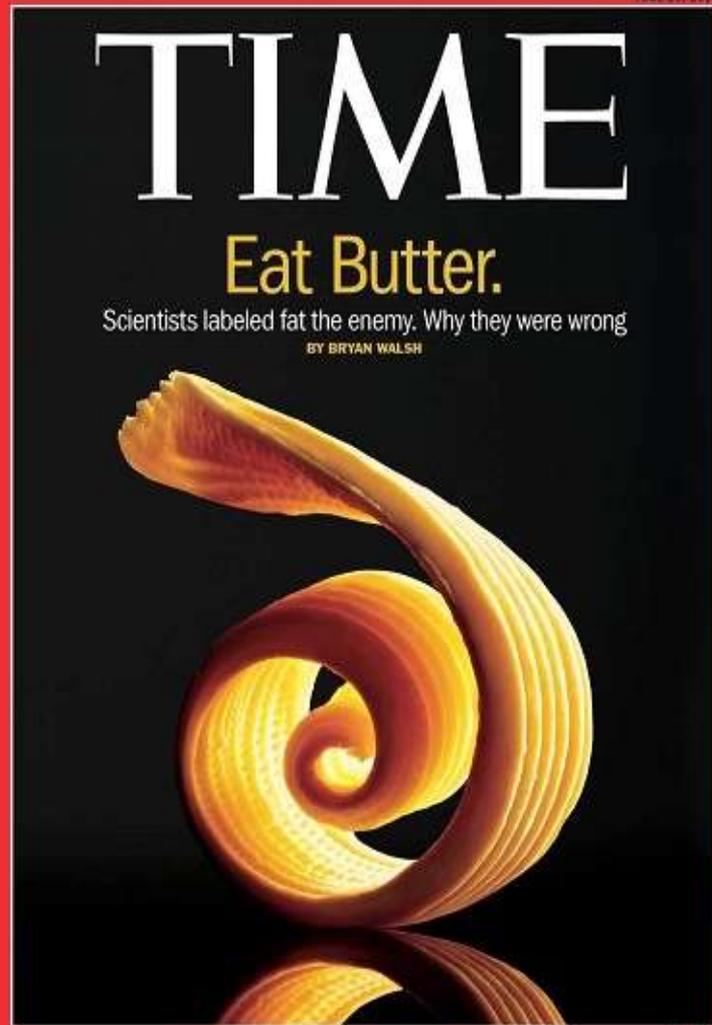


60% of consumers think its important for a brand to be transparent about all its practices

47% of 21-38 buy from smaller brands



It's hard not
to be
cynical..





the goodness inside®

- 2 3/4 apples
- 1/2 banana*
- 1/2 kiwi
- 1/2 mango
- 1/2 pineapple*
- 1335mg spirulina
- 409mg alfalfa
- 102mg broccoli
- 102mg spinach
- 51mg kale
- 51mg garlic
- 76mg barley grass
- 76mg wheatgrass
- 51mg ginger
- 51mg parsley



the goodness inside®

- 1 1/2 mangoes
- 1/2 orange
- 1 1/2 apples
- 1/2 banana*
- & a hint of lemon



the goodness inside®

- 15 raspberries
- 11 strawberries
- 3 cranberries
- 1 1/2 apples
- 1/2 pomegranate
- 1/2 orange
- 1/2 banana*
- 7 red grapes
- 2mg vitamin B6
- 6mcg vitamin B12
- 20mg vitamin C
- 8g flax seed
- 438-4mg omega-3 ALA
- 780mg potassium
- 5g fiber



Sorry, But Naked Juices Aren't as Healthy as You Think

One of these smoothies has more sugar than a can of soda.

By Cory Stog, Oct 6, 2016



Surprised by Ingredients



Aspartame Side Effects

Anxiety	Arthritis	Hair Loss
Candida	Asthma	Hives
ADD	Bloating	Hypertension
Obesity	Edema	Impotency
Headaches	Brain Cancer	Insomnia
Hyperactivity	Chronic Fatigue	Irritability
Tooth Decay	Chronic Cough	Itching
Diabetes	Confusion	Joint Pains
Brain Lesions	Diarrhea	Brain Fog
Mood Alterations	Dizziness	Memory Loss
Brain Tumors	Flushing	Muscle Spasms
Depression	Heart Palpitations	Weight Gain



HealthyHolisticLiving.com

Just to name a few...



Artificial Color **Red #3** Has Been Shown to Cause Cancer in Animal Studies



FDA BANNED IT FROM COSMETICS IN 1990
Still Allowed In Our Food!

FOOD BABE

#FoodBabeArmy

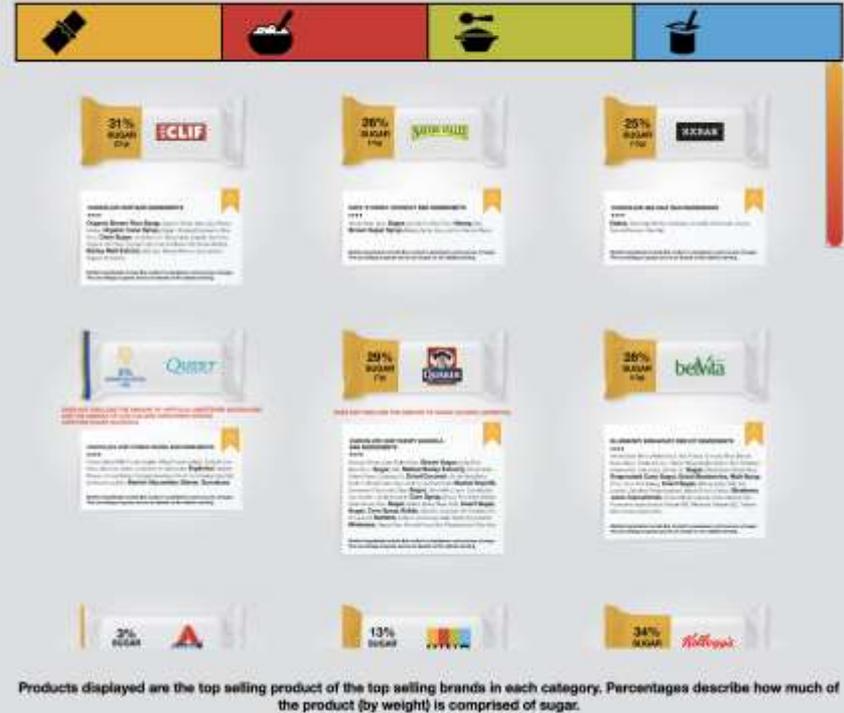
More info at FOODBABE.COM

KIND encourages food industry to disclose hidden sugars creating a pop up and online index to disclose disguised ingredients in Americas favourite snacks

There are more than 100 different names and types of sweeteners and sugar sources out there

“Nearly 75% of packaged goods and drinks in the US contain a sugar or a low cal sweetener”
Lancet

national snacking index



HOW DO YOUR FAVORITE "HEALTHY"
SNACK BARS STACK UP TO A SERVING OF
YOUR FAVORITE TREATS?

Kellogg's
Nutri Grain
Soft Baked Bars



32%
SUGAR
(12g)

VS.

Chips Ahoy



31%
SUGAR
(9g)
one serving =
3 cookies

Clif Bar



31%
SUGAR
(21g)

VS.

Little Debbie
Oatmeal Creme
Pie



32%
SUGAR
(12g)



Bord Bia
Irish Food Board

Brand Trust



Consumer Trends

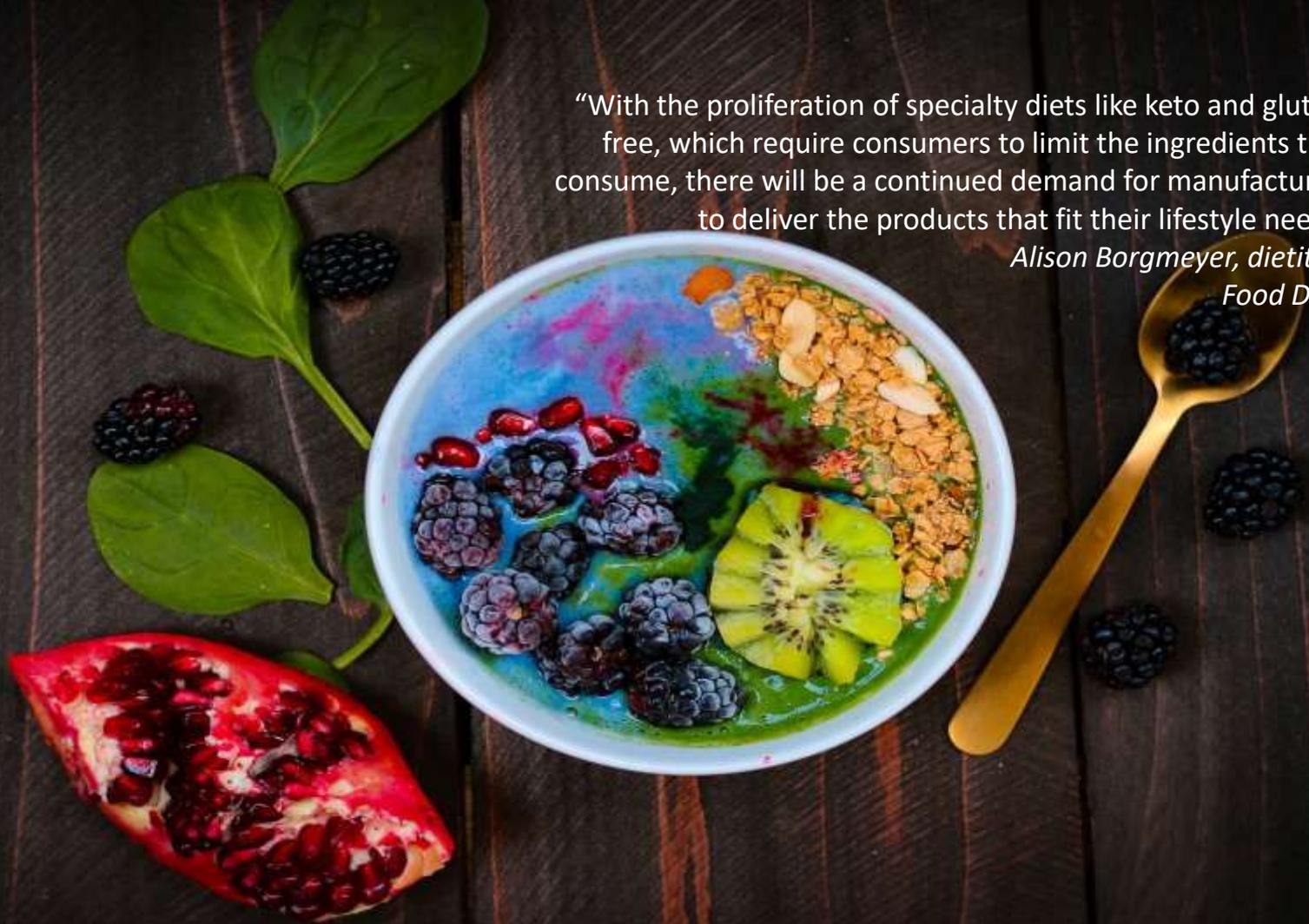


Grain free, dairy free, paleo , keto,
alkaline diets all have a take on pre
industrialised food



“With the proliferation of specialty diets like keto and gluten-free, which require consumers to limit the ingredients they consume, there will be a continued demand for manufacturers to deliver the products that fit their lifestyle needs”

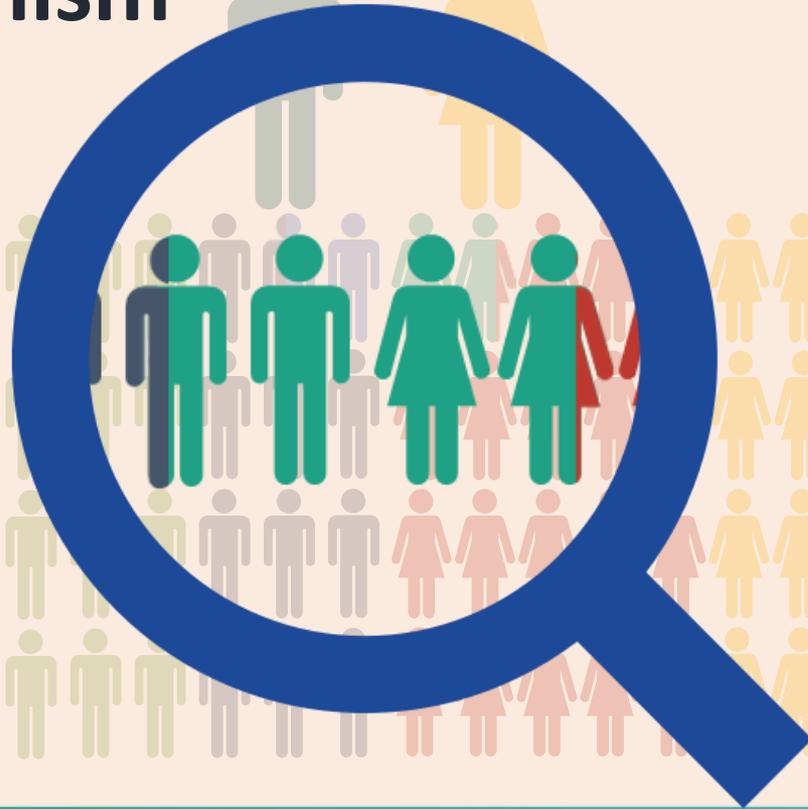
*Alison Borgmeyer, dietitian
Food Dive*



A vibrant collage of various healthy foods including vegetables, fruits, grains, and proteins. The image features a variety of items such as green peas, asparagus, avocado, bread, salmon, carrots, and nuts, all arranged in a circular pattern around a central teal circle containing text.

22% of People
claim to be
following a
specific dietary
regime

Veganism



3.5%

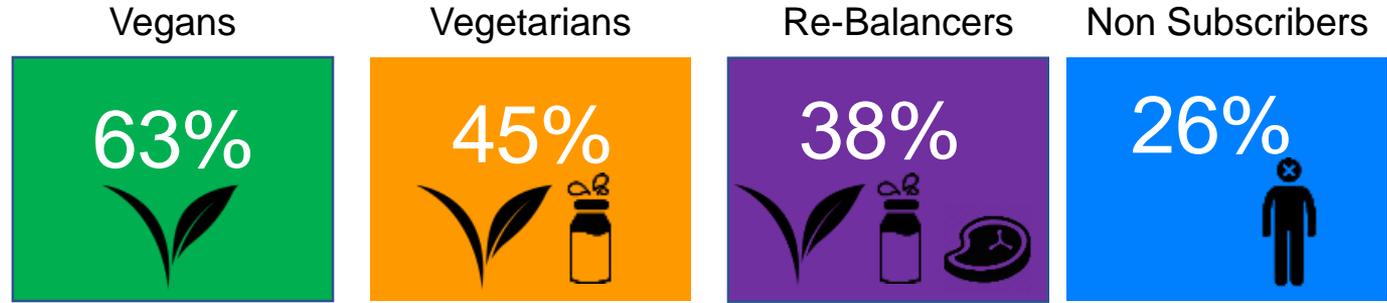




92% indicate that they **would like to make a change** to improve their health and wellbeing

*The most common change that people would like to make is to be more **physically active** (40%), followed by being more financially secure (31%), sleeping better (30%) and **eating more healthily** (29%)*

“My Food Choices are a Big Part of my Identity”

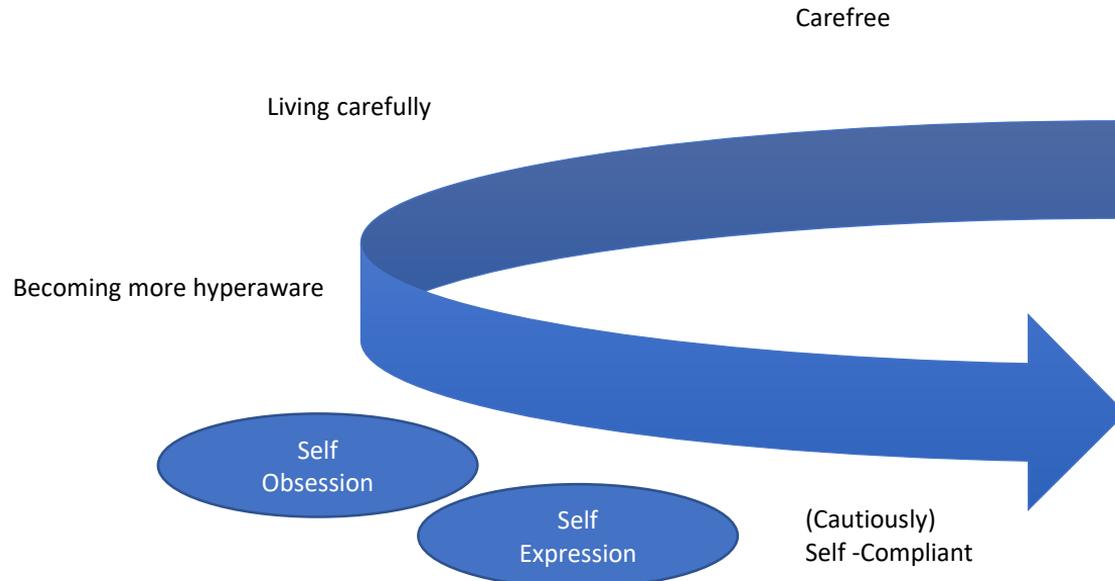


% 8-10 on a 10 point scale; n=8,000

The “anti hedonist” generation
have a pre-industrialized take
on food



How we scrutinize food is getting more complex



Are we moving towards an era of more self - compliant consumerism?



Global wellness market now valued at 4.2 trillion

HEALTH &

Wellbeing

Health-savvy consumers and innovators are discovering and extracting the true wellness benefits of natural ingredients, giving certain products a surge of popularity or a new lease of life.

REDISCOVERING NATURAL

HOW IS IT MANIFESTING?

Through the eyes of our Streetscapers...

"It seems our dark Tualang honey is gaining popularity outside of Malaysia – we understand now it is good for amino acids and vitamins, much like other traditional ingredients here."

Lavina, Malaysia



Malaysia



United Kingdom

"We're trying to incorporate berries into everything now we're shown their pigment contains cancer-fighting enzymes."

Lucy, UK



HEALTH &

Wellbeing

Increasing consumer appetite for alternatives to products perceived to be unhealthy drives growth of solutions reshaping our overall diet



ENGINEERING GOODNESS

HOW IS IT MANIFESTING?

Through the eyes of our Streetscapers...

“Food and drink in Japan occupies a strange place in 2018. In general, consumers are inclined to eat at cheaper restaurants — McDonald’s has seen a massive sales spike in recent years — although interest in more expensive and novel alternatives is also sky rocketing”

Patrick, Japan



Japan



Denmark



“Green restaurants and cafes began opening all over Copenhagen from the end of 2016 and have become hugely popular. ‘Green restaurants and cafes’ count as places that have a strong focus on health-oriented alternatives to traditional dishes, often lab-grown”

Kinvara, Denmark

Food Neurosis Is Driving the "Clean" Conversation

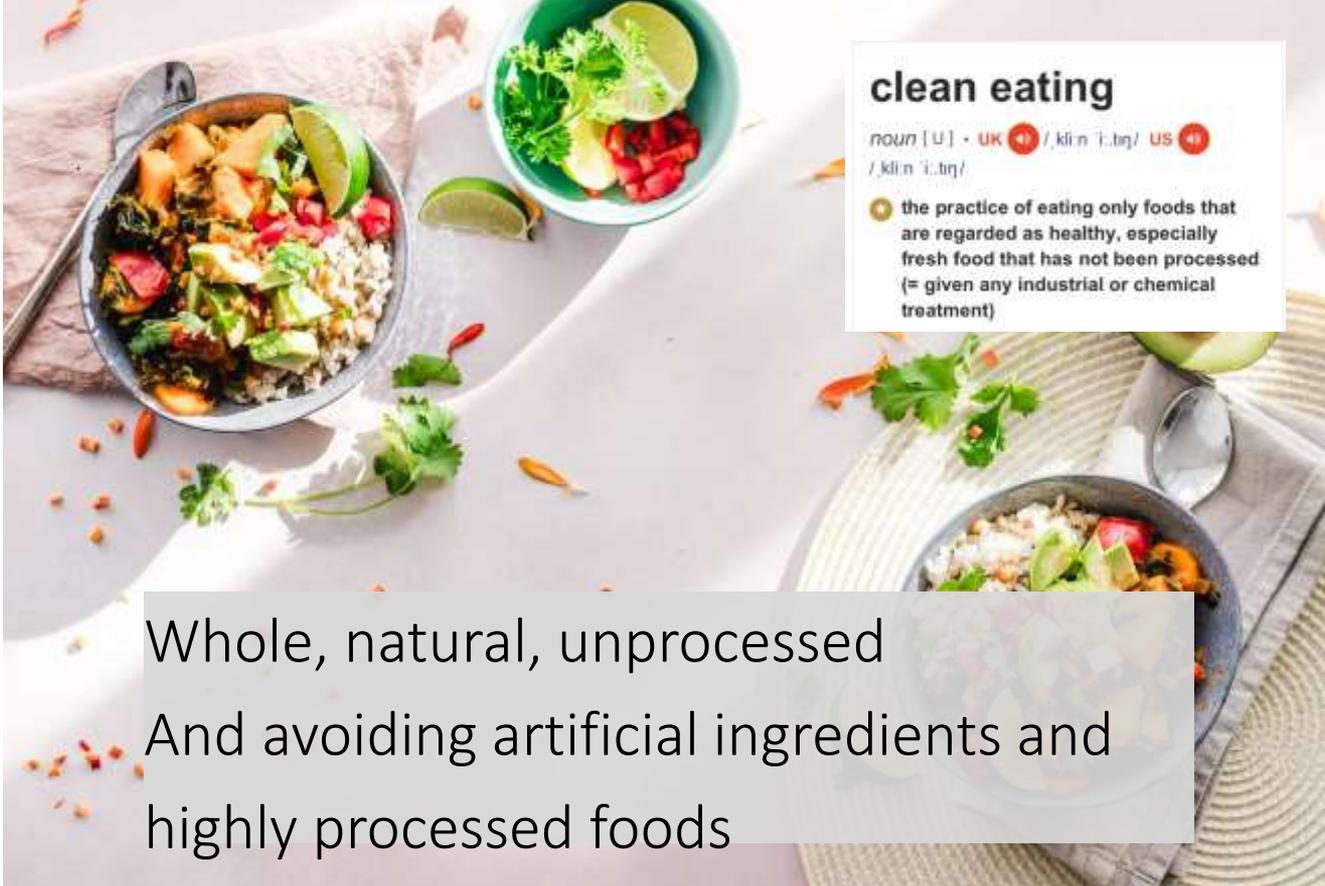


What is clean?

THE **KFC**[®]

#CLEANEATING BURGER





clean eating

noun [U] • UK  /kli:n 'i:tiŋ/ US 
/kli:n 'i:tiŋ/

- the practice of eating only foods that are regarded as healthy, especially fresh food that has not been processed (= given any industrial or chemical treatment)

Whole, natural, unprocessed
And avoiding artificial ingredients and
highly processed foods

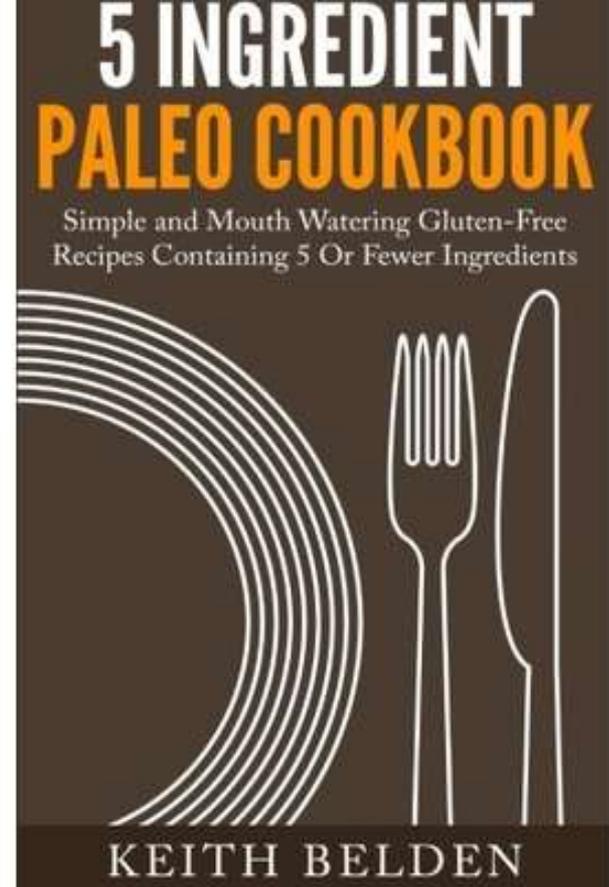


45% of US consumers don't know what "clean label" means

Canadean

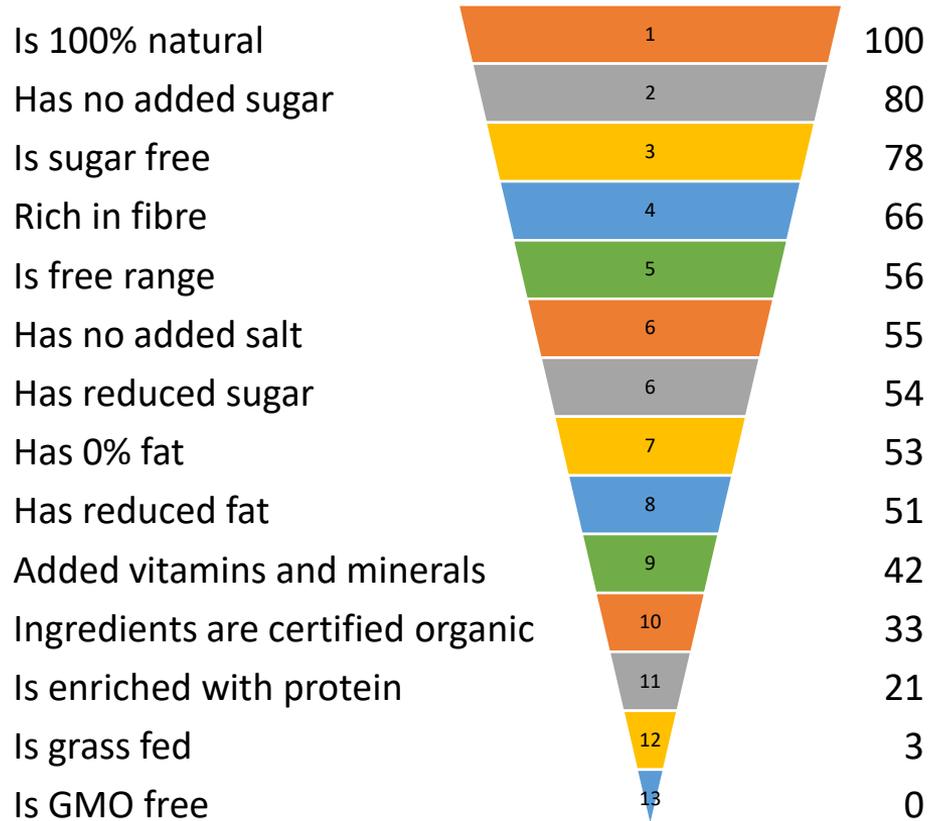
57% feel the
fewer ingredients
in food and drinks
the better*

*Q.13 There are many different attitudes that people hold about food health, ingredients, nutrients and labelling.
To what extent do you agree or disagree with each attitude?



What claims influence purchase?

Claims Influence Index



**What claims do
consumers pay
attention to?**

Calorie breakdown
in Kcal per 100g

55%

Calorie breakdown
in product %

57%

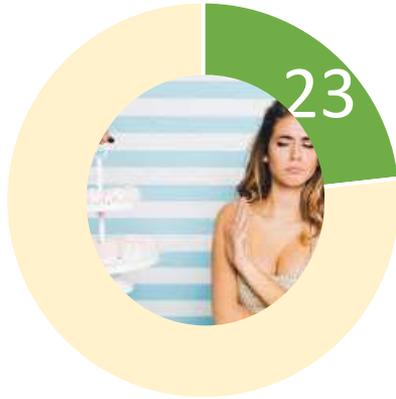




Nutritional
breakdown in
product per 100g

51%

There are four key consumer segments



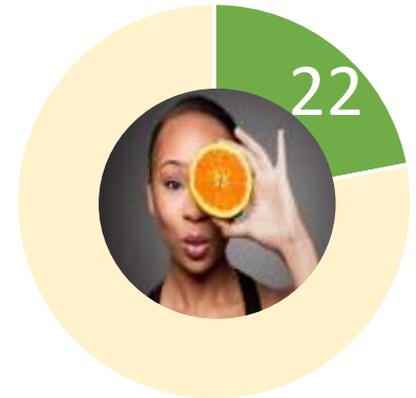
Sugar Avoiders



Fat Avoiders



Nutrifiers



Purists



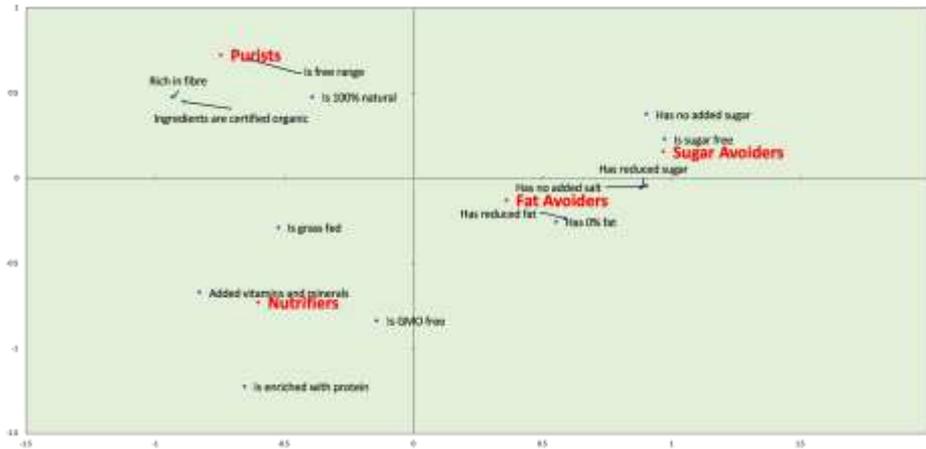
Sugar Avoiders

Sugar Avoiders are Disproportionately Influenced By..

- No Added Sugar
- Is Sugar Free
- Has Reduced Sugar



Sugar Avoiders



Sugar Avoiders



Sugar Avoiders

Male/Female Split



52%



48%

Age

18-34: 22%

35-44: 16%

45+: 61%

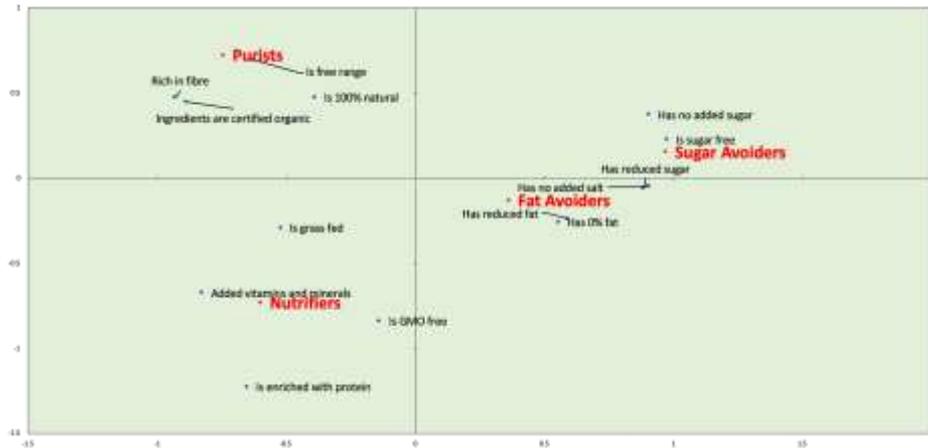
Fat Avoiders



Fat Avoiders

Fat Avoiders are Disproportionately Influenced By..

- Has Reduced Fat
 - Has 0% Fat
- Has No Added Salt



Fat Avoiders



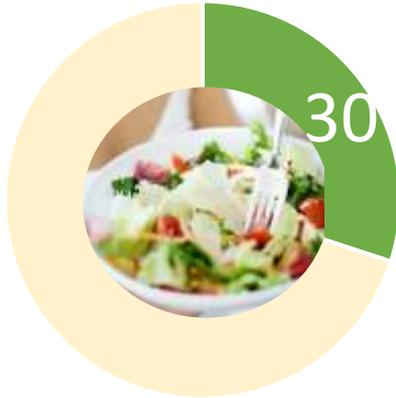
Fat Avoiders

Male/Female Split		
	52%	48%
Age	18-34: 30%	
	35-44: 18%	
	45+: 52%	

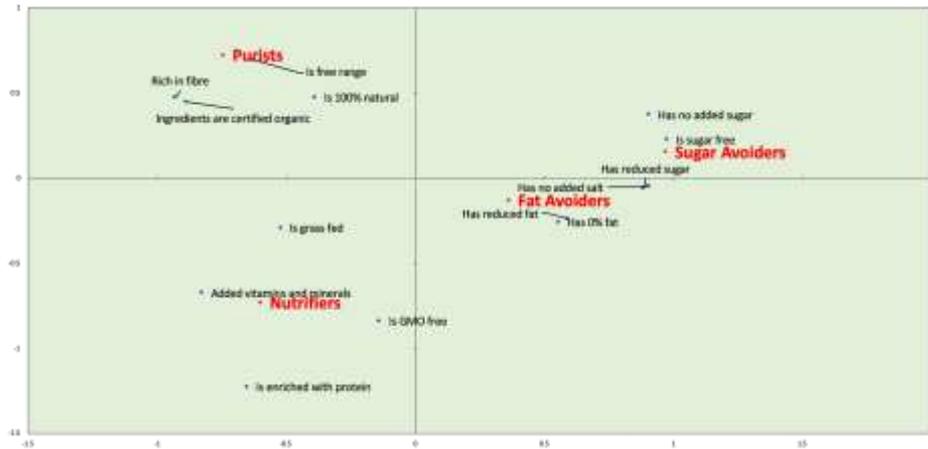
Nutrifiers

Nutrifiers are Disproportionately Influenced By..

- Added Vits and Mins
- Is Enriched with protein



Nutrifiers



Nutrifiers



Nutrifiers

Male/Female Split



52%



48%

Age

18-34: 40%

35-44: 21%

45+: 39%

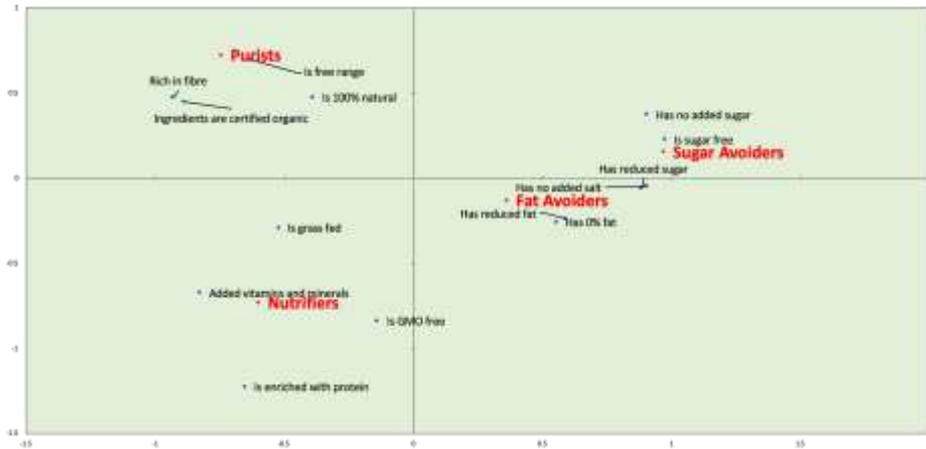
Purists

Purists are
Disproportionately
Influenced By..

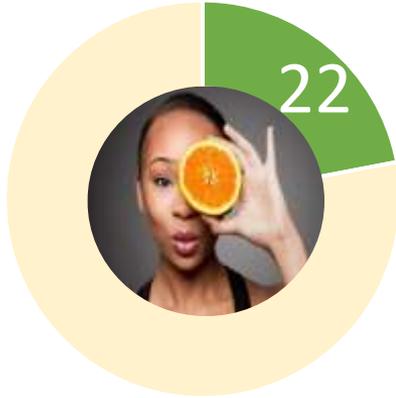
- Rich in Fibre
- Is Free Range
- Is 100% Natural
- Certified Organic



Purists



Purists



Purists

Male/Female Split



52%



48%

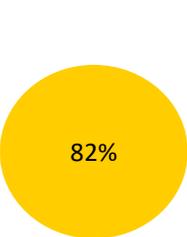
Age

18-34: 19%

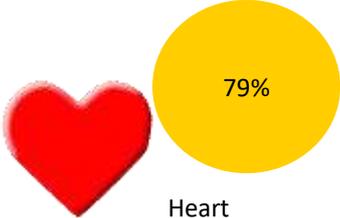
35-44: 15%

45+: 66%

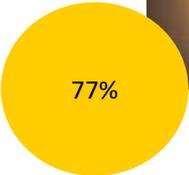
Goals Influencing Choice



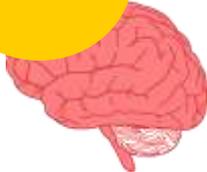
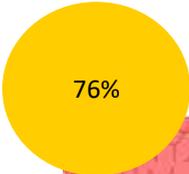
Weight



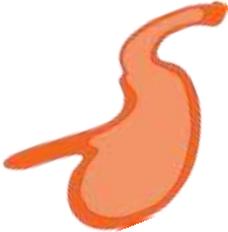
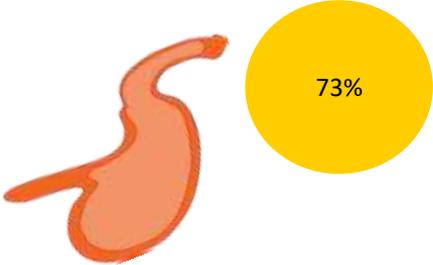
Heart



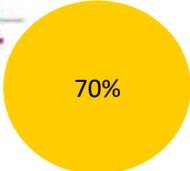
Energy



Brain

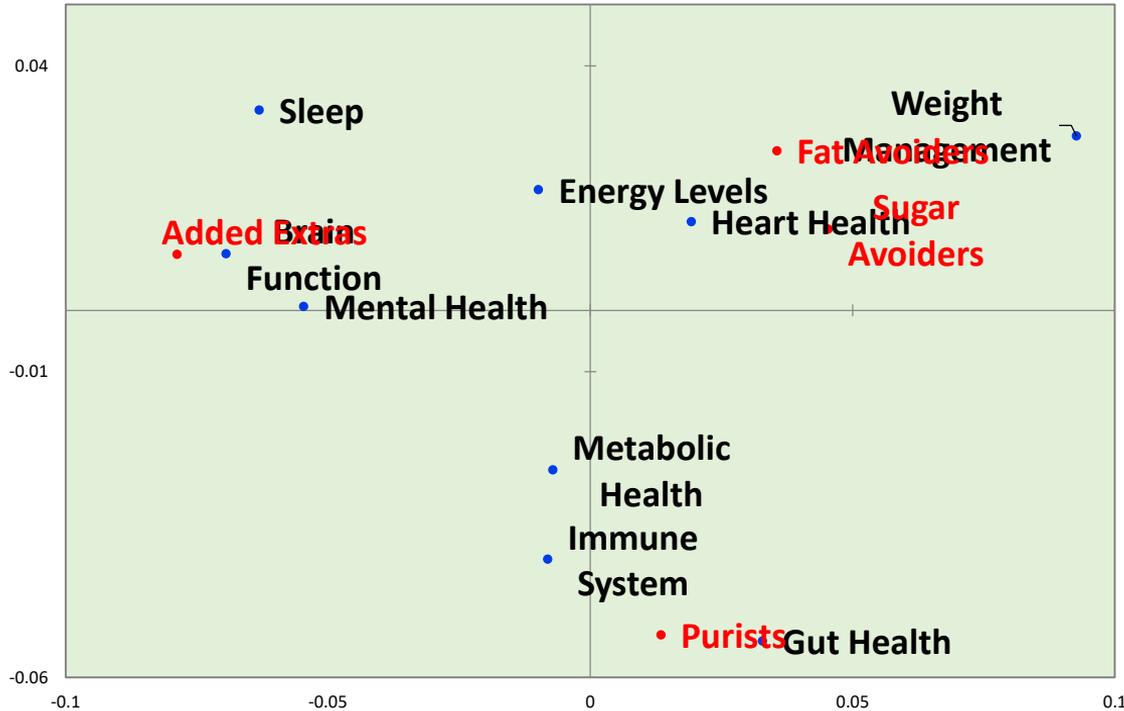


Gut



Immune

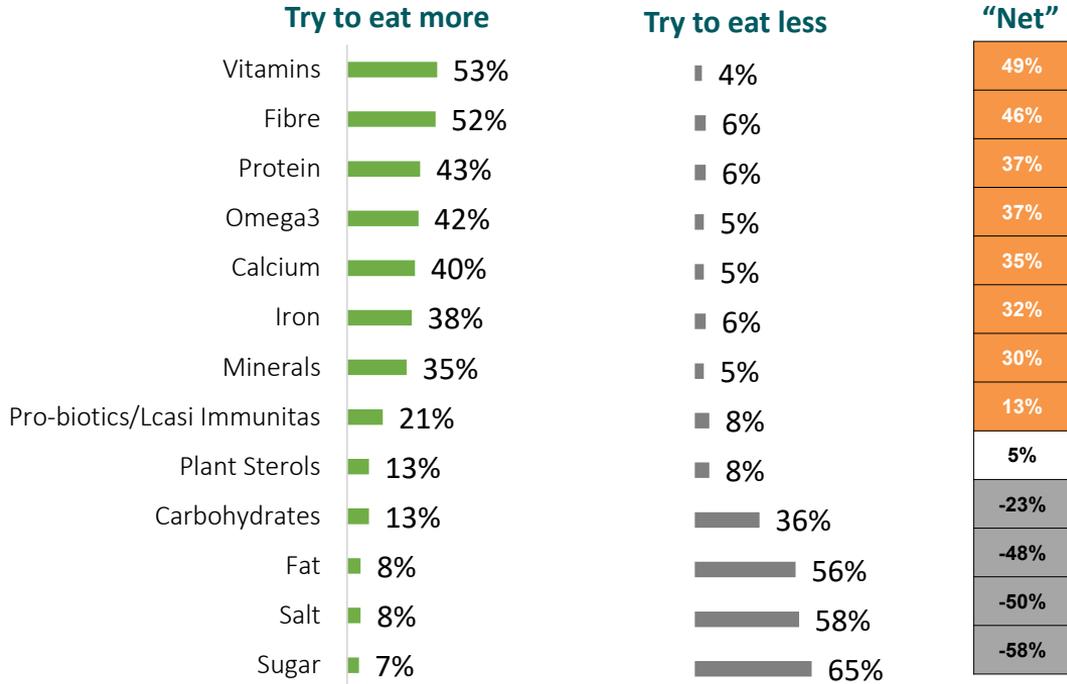
Goals Influencing Choice



TOP 3 GOALS

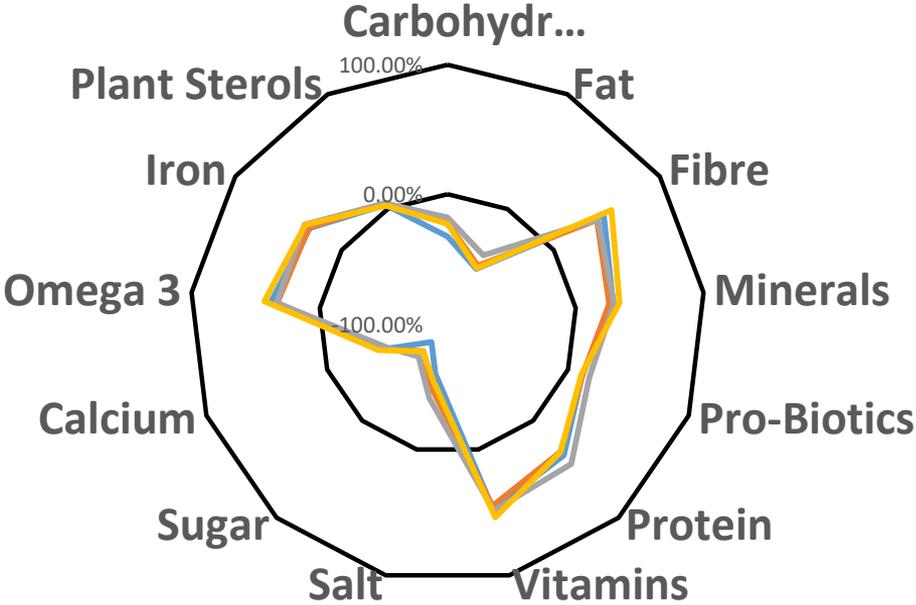
	% Big Influence
NUTRIFIERS	
Weight Management	39%
Heart Health	38%
Energy Levels	38%
FAT AVOIDERS	
Weight Management	43%
Heart Health	35%
Energy Levels	32%
SUGAR AVOIDERS	
Weight Management	41%
Heart Health	32%
Energy Levels	31%
PURISTS	
Weight Management	36%
Heart Health	31%
Gut Health	30%

Nutrient focus is pretty universal



However there are some apparent spikes

— Sugar Avoiders — Fat Avoiders — Nutrifiers — Purists



While a similar profile emerges....

“Purists” more likely to focus on Fibre, Minerals, Vitamins, Calcium & Omegas.

“Nutrifiers” more likely to focus on getting more Iron, Sterols, Protein & Prebiotics.

For “sugar and fat avoiders” more mainstream issues of avoiding sugar, fat and carbs prevail.

Labelling

A woman with long dark hair is seen from the side, looking at a product label in a grocery store aisle. The background is filled with various food items on shelves, creating a blurred effect.

41% are confident
that they can tell if a food
is healthy by looking at
the label

Only **1 in 5** claim to
scrutinise the ingredients
panel on average

1 in 3 people
claim they can tell
if a product is
healthy by looking
at the packaging



50% of consumer
are more likely to buy if
health/nutrition
information is on the
Front Of Pack





Front of pack



The Semiotics Of Symbols



The Credibility Of Colour



Green and clean and natural





Bord Bia
Irish Food Board

The Ideal Label





I like to see the
Traffic Light System

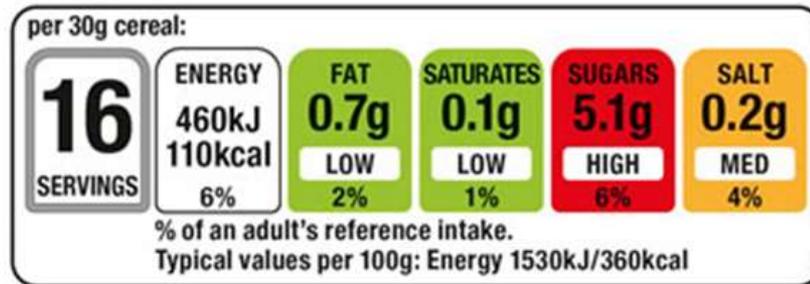
86
%

84
%

74
%

80
%

67
%



medium 5g	Fat
low 1g	saturates
high 15g	Sugar
low 0.1g	Salt
256 kcal	Calories



The Traffic Light System



Ingredients

Ins, Outs & No No's



“Negatives are easier to understand than positives”

Warren Belasco

Appetite for Change

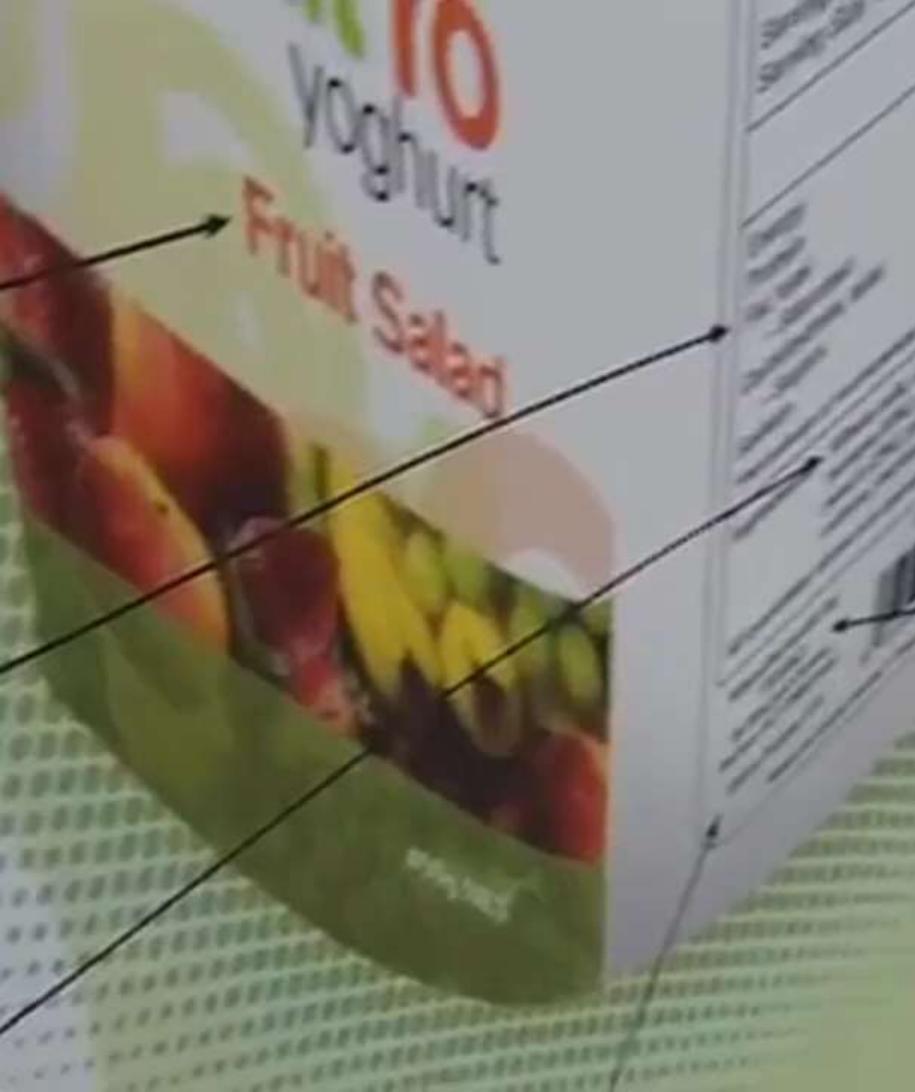
The Power Of No



Ingredients to Avoid



Which ingredients do you actively avoid? (Spontaneous)



'E' / Ingredients
No No



-ates and -ites

nitrite NO_2^{-1}	sulfite SO_3^{-2}	phosphite PO_3^{-3}
nitrate NO_3^{-1}	sulfate SO_4^{-2}	phosphate PO_4^{-3}



McDonald's Quarter Pounder With Cheese Ingredients:

QUARTER POUND 100% BEEF PATTY: 100% Pure USDA Inspected Beef. Prepared with Grill Seasoning (Salt, Black Pepper). SESAME SEED BUN: Enriched Flour (Wheat Flour, Malted Barley Flour, Niacin, Iron, Thiamine Mononitrate, Riboflavin, Folic Acid), Water, Sugar, Yeast, **Soybean Oil**, Contains 2% or Less: Sesame Seeds, Salt, Wheat Gluten, Potato Flour, May Contain One or More Dough Conditioners (**DATEM**, Ascorbic Acid, **Mono and Diglycerides**, Enzymes), Vinegar, PASTEURIZED PROCESS AMERICAN CHEESE: Milk, Cream, Water, Sodium Citrate, Salt, Cheese Cultures, Citric Acid, Enzymes, Soy Lecithin, Color Added, KETCHUP: Tomato Concentrate from Red Ripe Tomatoes, Distilled Vinegar, **High Fructose Corn Syrup**, **Corn Syrup**, Water, Salt, **Natural Flavors**, PICKLE SLICES: Cucumbers, Water, Distilled Vinegar, Salt, Calcium Chloride, **Alum**, **Potassium Sorbate (Preservative)**, **Natural Flavors**, **Polysorbate 80**, Extractives of Turmeric (Color), ONIONS, MUSTARD: Distilled Vinegar, Water, Mustard Seed, Salt, Turmeric, Paprika, Spice Extractive.

54% are
concerned about
ingredients that sound
artificial

37% tend to
avoid products if they
contain unrecognizable
ingredients

Servings per package: 3
Serving Size: 150g

Bord Bia
Irish Food Board

	Quantity per Serving	Quantity per 100g
Energy	608kJ	405kJ
Protein	4.2g	2.8g
Fat, total	7.4g	4.9g
– Saturated	4.5g	3.0g
Carbohydrate, total	18.6g	12.4g
– Sugars	18.6g	12.4g
Sodium	90mg	60mg

*Percentage of recommended dietary intake

Ingredients: Whole milk, concentrated skim milk, s
100% strawberries (6%) granu

Ingredients I can't pronounce

INGREDIENTS: Enriched Wheat Flour [Flour, Ferrous Sulfate (Iron), B Vitamins (Niacin, Thiamine Mononitrate (B1), Riboflavin (B2), Folic Acid)] Sugar, Corn Syrup, Water, High Fructose Corn Syrup, Vegetable and/or Animal Shortening (Contains one or more of: Partially Hydrogenated Soybean, Cottonseed, or Canola Oil, Beef Fat), Dextrose, Whole Eggs. Contains 2% or Less of: Modified Corn Starch, Cellulose Gum, Whey, Leavenings (Sodium Acid Pyrophosphate, Baking Soda, Monocalcium Phosphate), Salt, Cornstarch, Corn Flour, Corn Syrup Solids, Mono- and Diglycerides, Soy Lecithin, Polysorbate 60, Dextrin, Calcium Caseinate, Sodium Stearoyl Lactylate, Wheat Gluten, Calcium Sulfate, Natural and Artificial Flavors, Caramel Color, Sorbic Acid (to Retain Freshness), Color Added (Yellow 5, Red 40).



44% try to

avoid food and drinks that
contain preservatives

52% avoid

food and drinks avoid food
and drinks that contain
sweeteners or sugar
substitutes



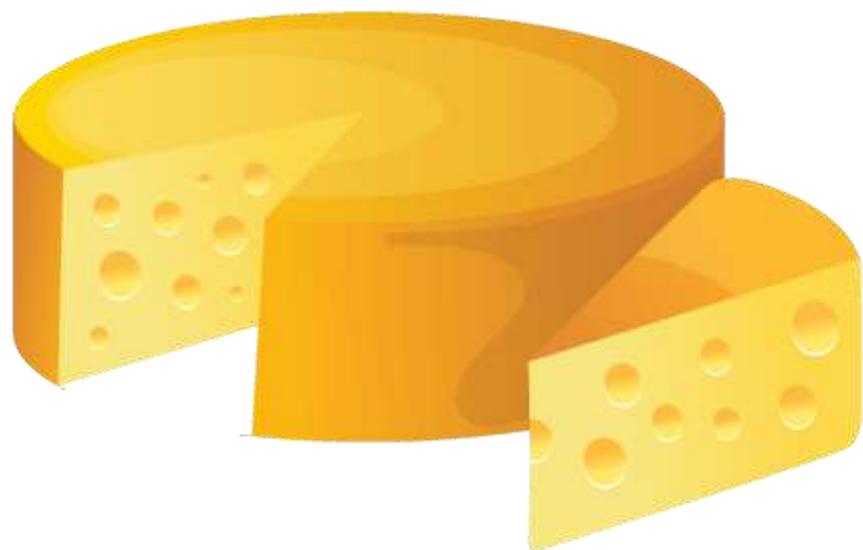
Ingredients to Avoid



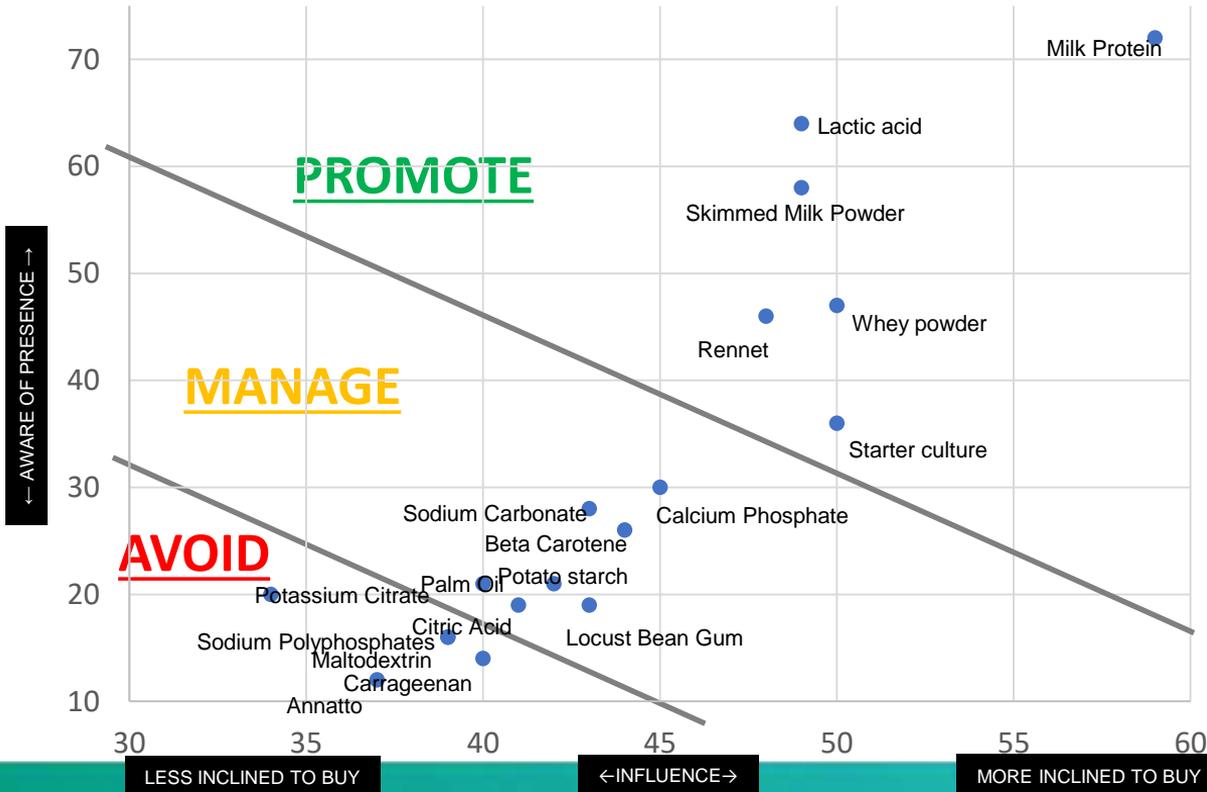
Q. Which ingredients do you actively avoid?

Category Dynamics

BORD BIA 
Thinking
House



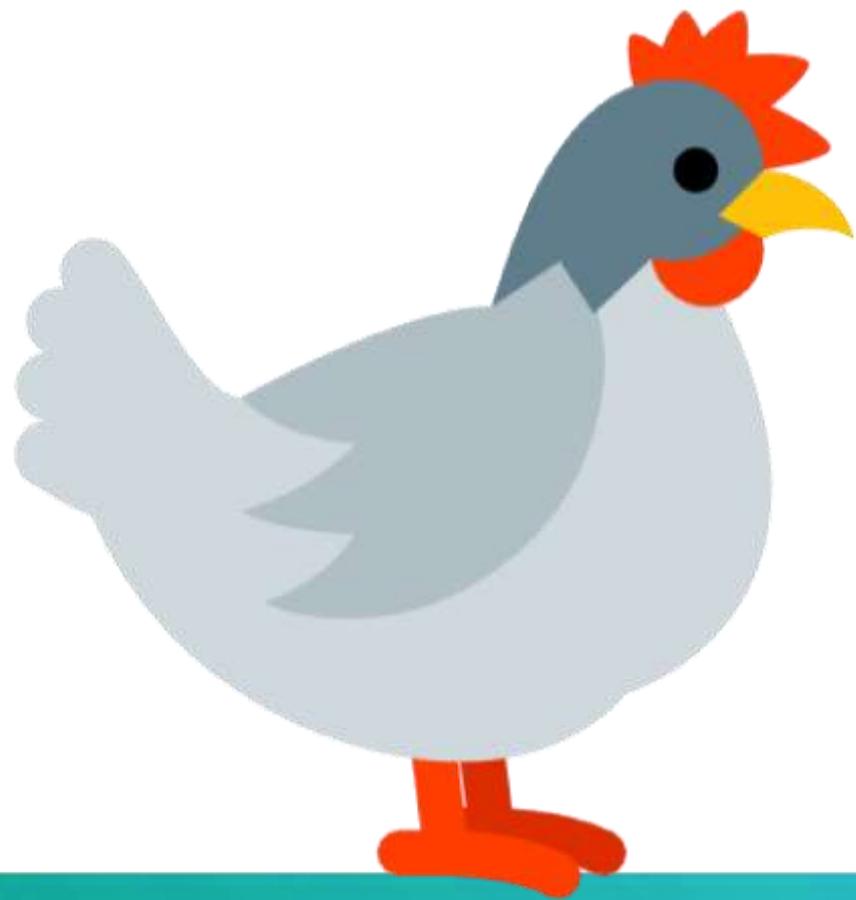
Cheese



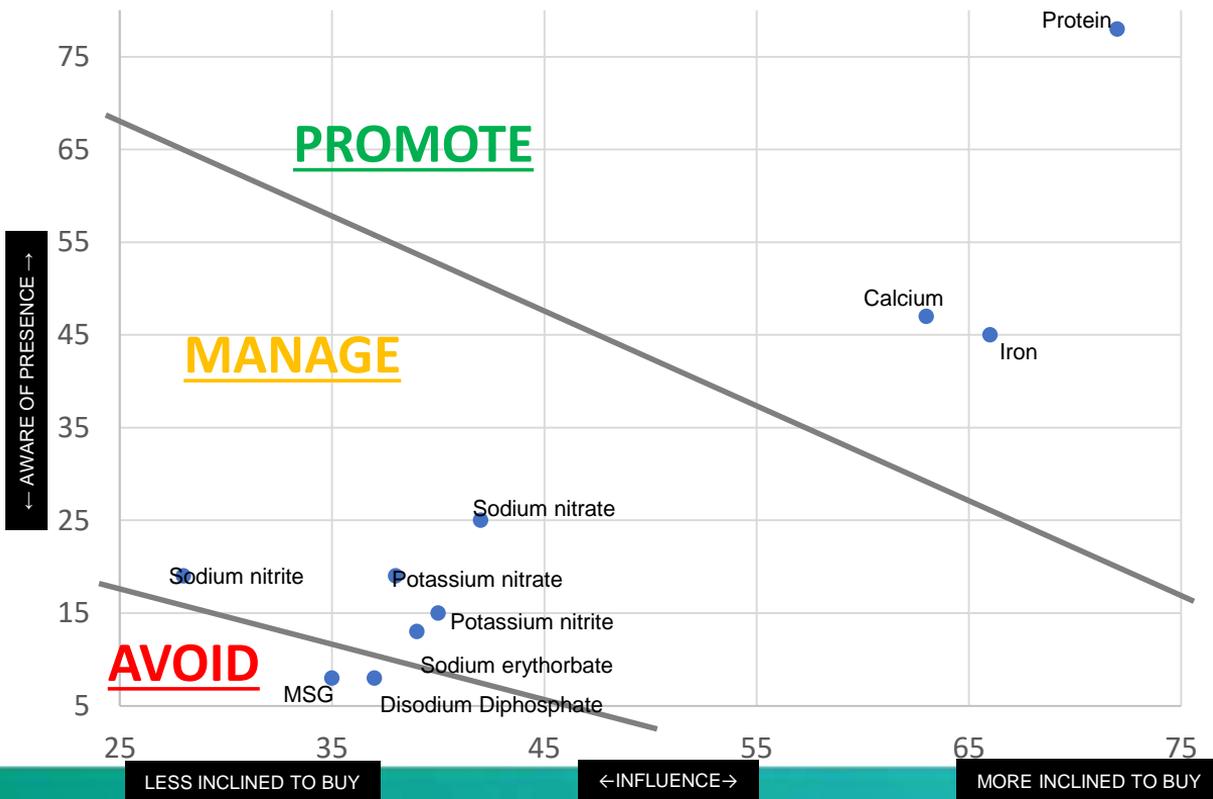
Protein
Lactic Acid
Whey

Calcium Phosphate
Palm Oil
Potato Starch

Annatto
Sodium Carbonate



Chicken



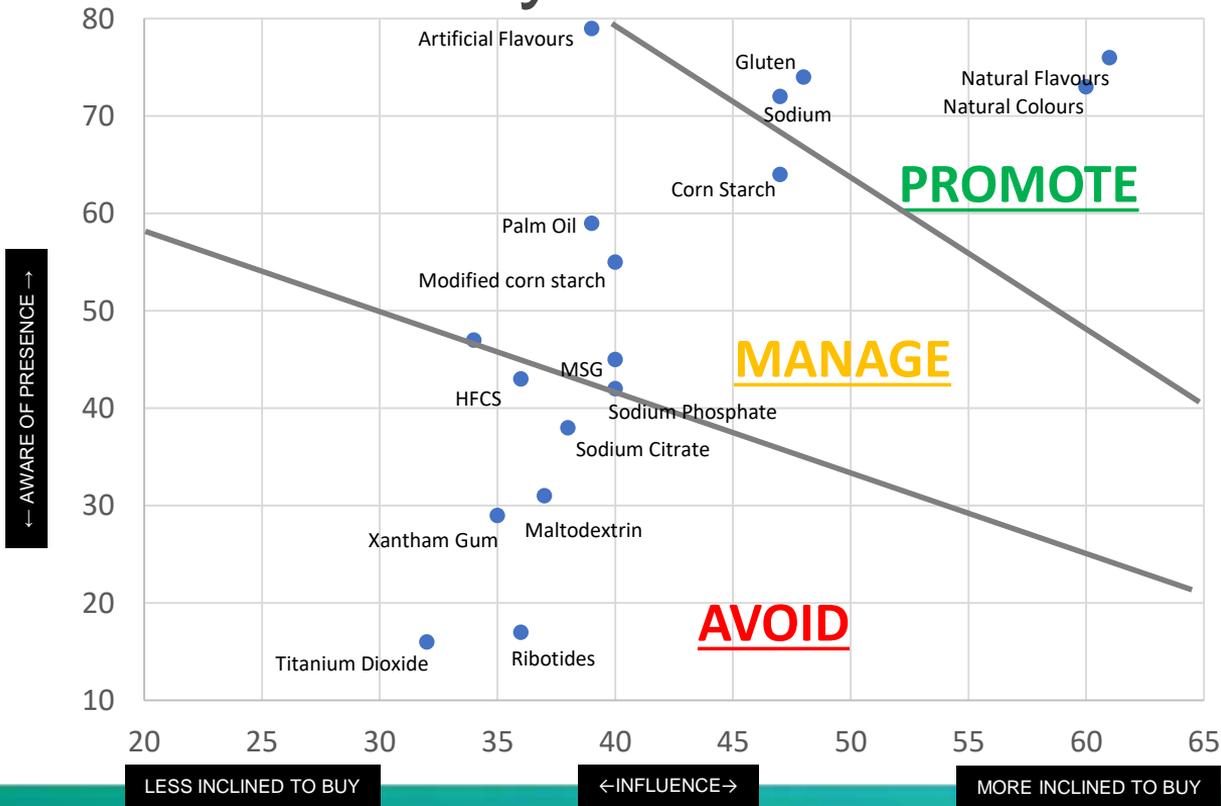
Protein is a natural benefit to promote along with Calcium & Iron....

....but Sodium and Potassium could be repositioned...

....and can MSG and Disodium Diphosphate be avoided?



Chilled Ready Meals



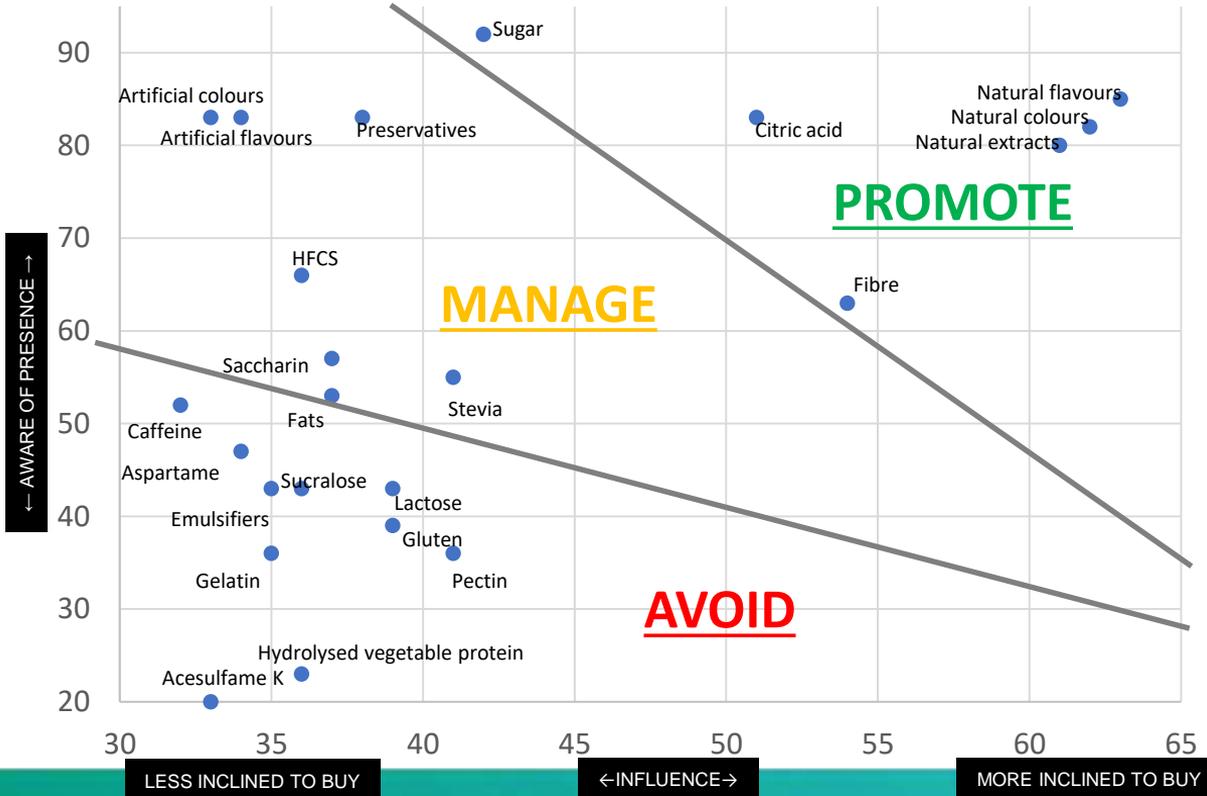
Promote Naturalness whenever possible. Consumers expect some artificiality.

...Manage Palm Oil, Corn Starch & MSG...

...and can you avoid the 'x's', 'ites' and 'ates'?



Juices



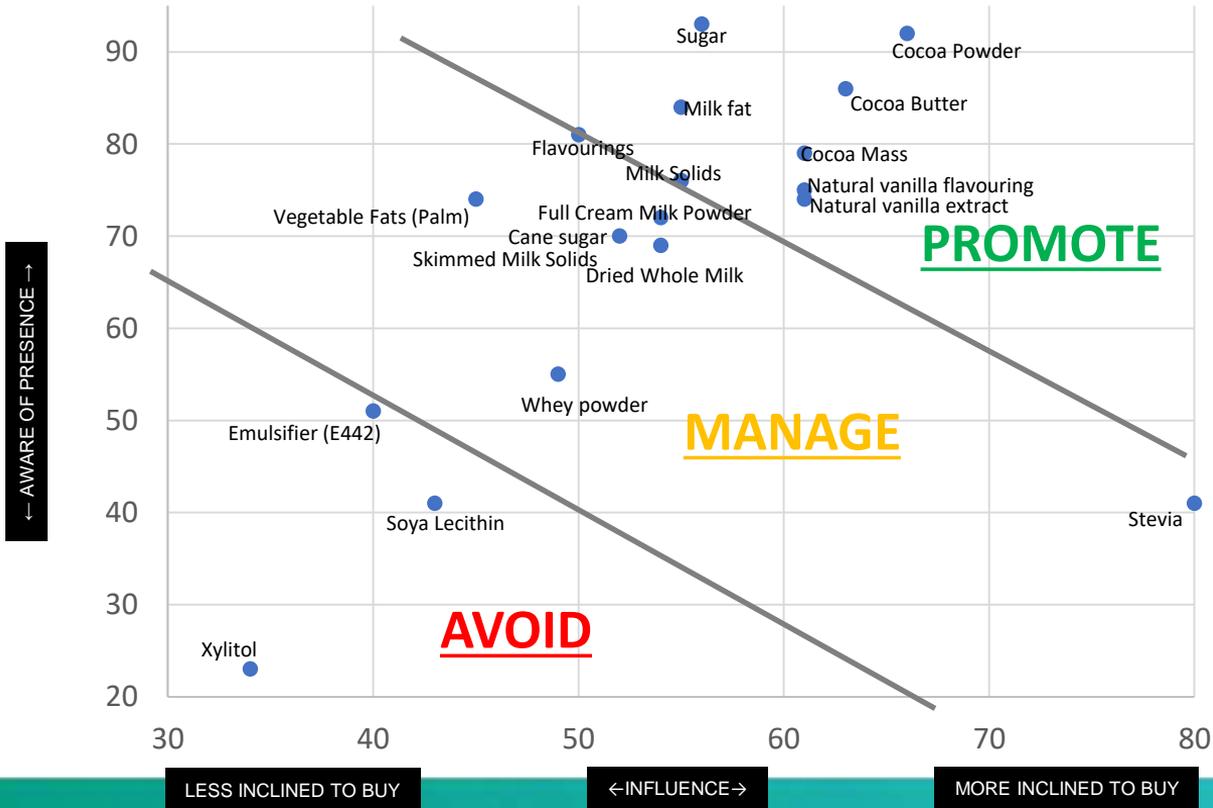
Promote Naturalness again and perhaps just be open about Sugar...

...Manage the sweeteners story, particularly Stevia...

...and can you avoid Acesulfame K?



Chocolate



Cocoa content is increasingly king...

...but managing the Vegetable Fats (Palm Oil) message is also important...

...and can you avoid Xylitol?

21st Century Clean

BORD BIA 
Thinking
House

The Kellogg Experiment



How many calories in a hamburger?





32% of people say they would use an app to establish if food is healthy

17% of

consumers are aware a
product's label can be
scanned AND have
previously scanned the
label



Case Studies



1. Frosta
2. Little Secrets
3. Purely Elizabeth
4. Spindrift
5. Banza
6. Applegate
7. Kashi

FRoSTA
REINHEITSGEBOT
mit 100%
frei von
Geschmacksverstärkern,
Farbstoffen &
Aromen



Hergestellt in
Bremerhaven



100% SEELACHSFILET
AUS DEUTSCHER FISCHEREI

BACKOFEN FISCHSTÄBCHEN

SEELACHS AUS DER NORDSEE

ca. 14 Min.



10 STÜCK 300g



Bord Bia
Irish Food Board

The Frosta Story













APPLEGATE
ORGANICS®



KEEP FROZEN • SERVING SUGGESTION

4 BURGERS • NET WT. 16 OZ. (1 LB.) (454g)

THE GREAT ORGANIC BLEND BURGER™

ORGANIC GRASS-FED BEEF BLENDED
WITH ORGANIC MUSHROOMS



+



*BEEF RAISED & FED A DIET IN COMPLIANCE WITH THE NON-GMO PROJECT STANDARD FOR AVOIDANCE OF GENETICALLY ENGINEERED INGREDIENTS. **BEEF NEVER ADMINISTERED ANTIBIOTICS, ADDED GROWTH HORMONES OR ANIMAL BY-PRODUCTS. †SEE NUTRITIONAL PANEL FOR CALORIE AND FAT CONTENT. ‡BEEF RAISED ON PASTURE AND 100% GRASS-FED WITH NO CONFINEMENT OR GRAIN-FINISHING.





Only Safe Catch Tests Every Fish for Mercury



Knead pouch to reabsorb natural oils. Do not drain. Tear here

Just Pure Tuna
100% Tested

Sustainably
Wild Caught

More Omega 3s
21g Protein

 **Safe Catch.**
Elite | Wild Tuna



Lowest Mercury of Any Brand
Great for Athletes, Kids & Pregnant Women



NET WT 3 OZ (85 g)

Platforms For Growth

BORD BIA 
Thinking
House

Always be "Insta"-clean

Build ingredient power

Crack the semiotic code for clean

Develop for Tech Transparency

Embrace the challenge

Fix those weasel words

#1 – Always be “Insta”-clean

Your brand can build on social-media’s innate ability to demonstrate ‘transparency’. In a world of food-porn and virtual chefs, consumers demand brands that are visibility arresting and ‘pop’.

Ask yourself, is your brand busy explaining or busy being understood. The strongest brands need no explanation. Look to other categories for inspiration, like the cosmetics brand Drunk Elephant that builds its comms around communicating clean ingredients visually on social media.



#2 – Build ingredient power

There is power in calling out ingredients visibly on-pack. In fact, some brands make a virtue out of absolute transparency in ingredients.

How can your brand 'hero' the ingredients in your products? What are the innate 'powers' your ingredients have to benefit consumers? And do you have natural Irish ingredients that consumers can believe in?

If your brand has ingredient power, call them out...



#3 - Crack the semiotic code for clean

Your brand can learn from how to crack the semiotic code by looking at how brands in other categories behave.

Look at skincare brands, cosmetic brands, detergent brands or even clothes and car brands to future proof your pack designs. Play close attention to:

- Colours
- Symbols
- Imagery
- Language

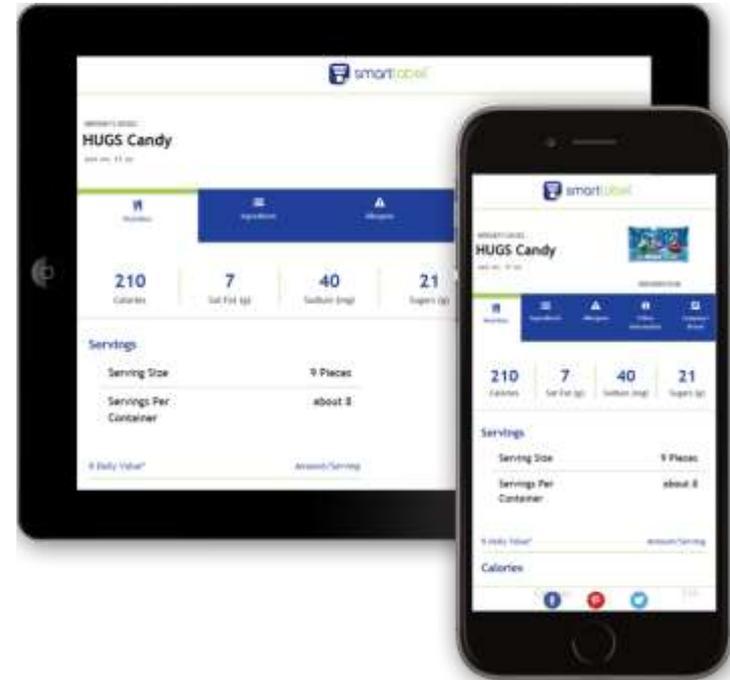


#4 – Develop for Tech Transparency

Your brand can leverage its ingredients strengths by embracing consumers' appetite for greater transparency.

Smart phones and our always on lives make access to information even easier than was ever the case before. In a world of 'fake news' consumers are going to demand truth and transparency in the food they eat.

Is your brand ready for the era of tech-transparency? Does your pack enable consumers to understand the detail behind the barcode?



#5 – Embrace the clean challenge

Change is possible in any business if the market is demanding it. Embracing the clean challenge is also about embracing the clean opportunity.

Is your brand committed to addressing the consumers of consumers and to moving to a more 'clean' ingredient list? What are the simple changes your brand can make? How will those changes allow you to compete against your rivals?

If you are going clean, you have to commit...



#6 – Fix those weasel-words

Your brand can drive credibility by being transparent around its ingredients but can also damage credibility by over-claiming on ingredient benefits.

There is evidence that big brands like Activia and Actimel have lost consumers faith on ingredient efficacy. Language like 'Can Help' to describe functional benefits is beginning to feel tired.

And of course avoid "ites", "ates" and "x's"...



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