

Consumer trends in sweeteners

February 27, 2019



INTERNATIONAL
SWEETENER COLLOQUIUM

FEBRUARY 24-27, 2019 | TURNBERRY ISLE MIAMI | AVENTURA, FL

Mintel data sources and who we are

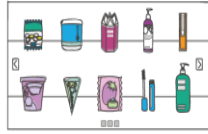
TEAMS OF EXPERTS



Today:
30+ years
Industry experience

+

CREDIBLE DATA



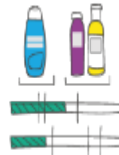
Mintel GNPD

Tracks new product launch activity in 62 markets across all F&D categories. All on-pack information + multiple high-resolution images captured. 30,000 new products per month.



Mintel Reports

Quantitative & qualitative market data + consumer insights on a category level. Available for UK, US, China, Brazil, Canada and Ireland.



Purchase Intelligence

We benchmark consumer reactions to every reported food and drink product launch in the US, France, UK, and Australia.



Mintel Market Sizes

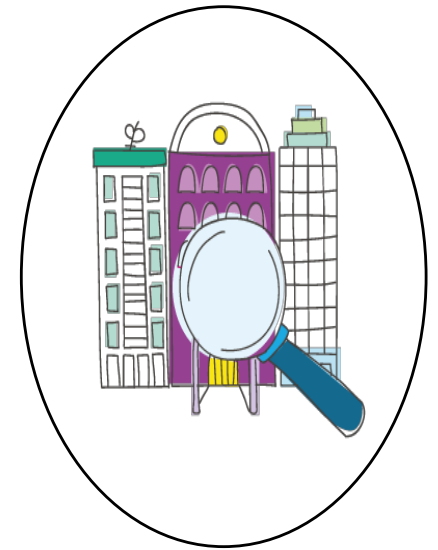
Global market volume, value, segmentation and share data. 5 year historical and 5 year forecast.



Mintel Trends

Tracks shifts in global consumer behaviour and monitors key trends by sector, demographic and theme making predictions as to how these will play out on the category level.

TRUSTED VALIDATION OF IDEAS



GROWTH
OPPORTUNITIES

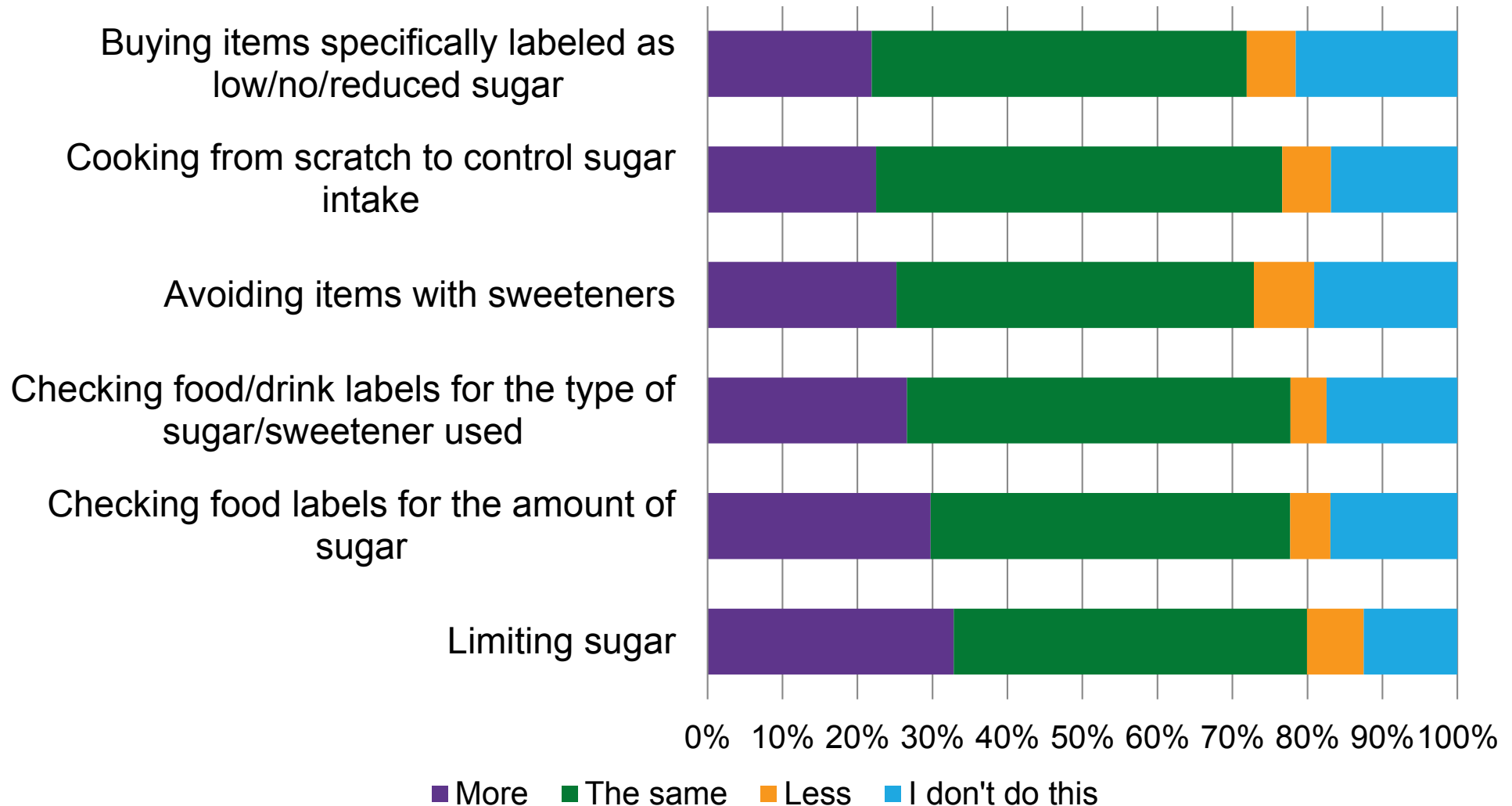
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Mintel's premium solution the 'Mintel Food & Drink Platform' combines all of these sources together alongside increased analyst support and category-specific monthly insights



Consumers are limiting sugar more than in the past

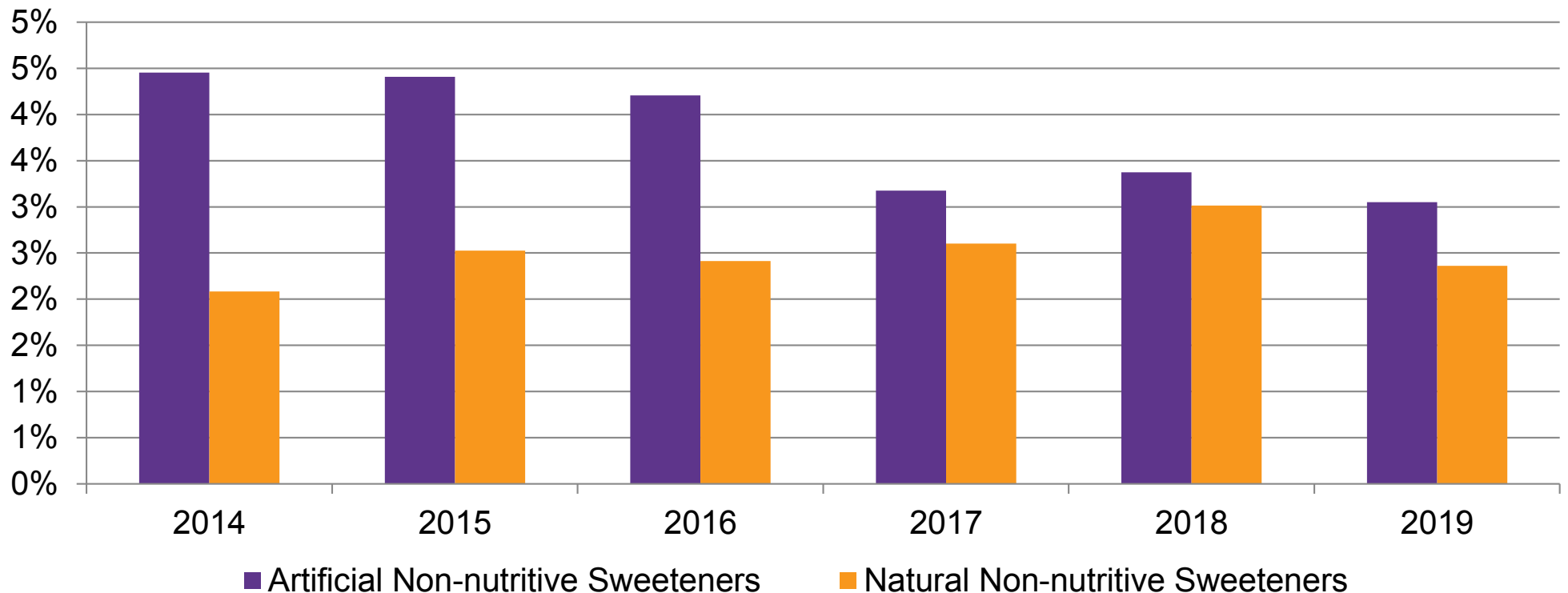
Sweetener usage changes in the last year, US



Incidence of artificial sweeteners continues to drop

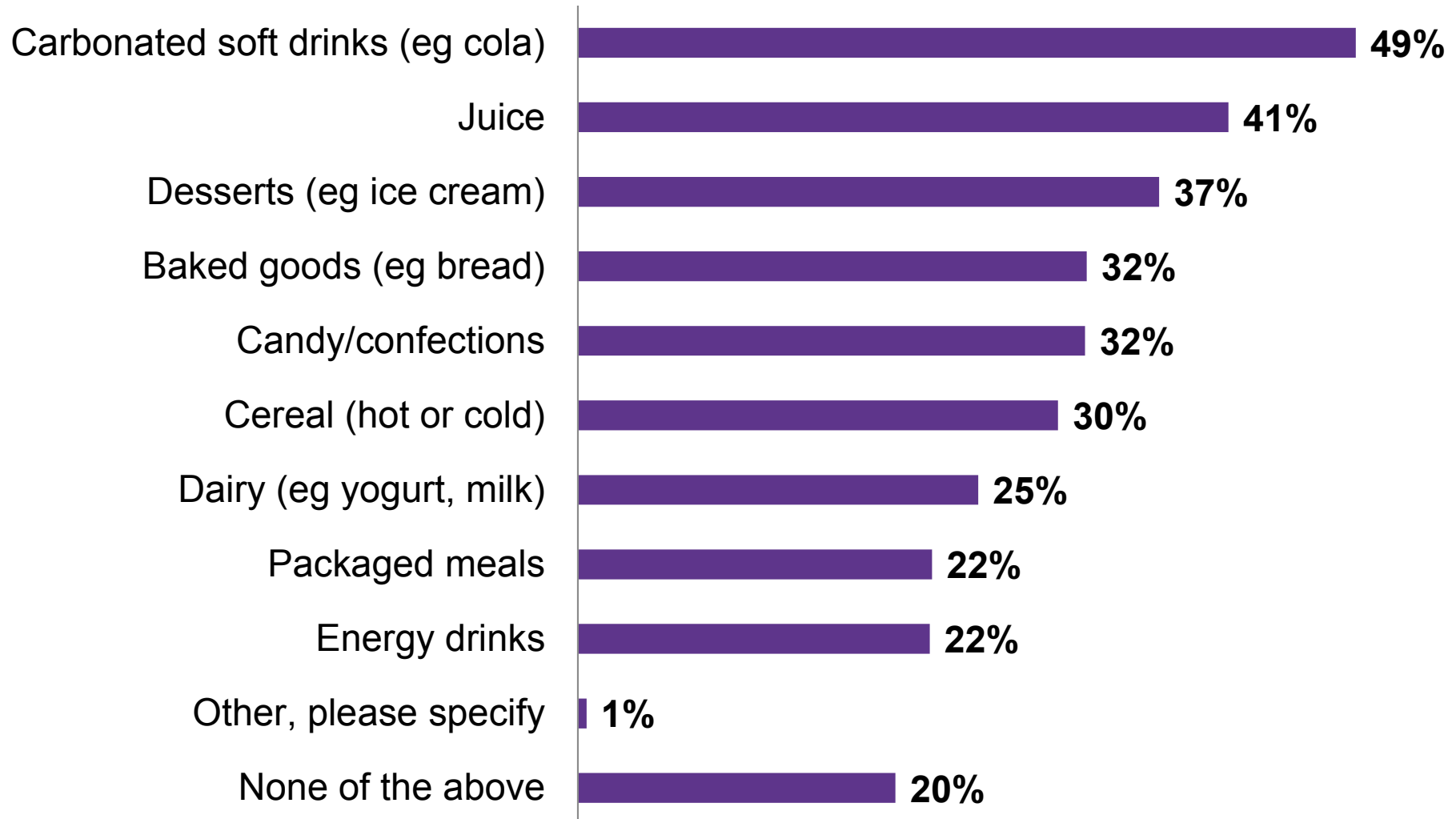
As the percent of products that contain artificial sweeteners continues to drop, those with natural sweeteners has increased over time.

New food & beverage introductions, US, with various sweetener types, 2014-Feb 2019



Not all categories are created alike when it comes to sweeteners

Categories of concern regarding added sweeteners



Consumers may be concerned about sugar, but they eat it

Although consumers say they are limiting sugar, it is white sugar they most often turn to

Contains four ingredients (white sugar is one)



That's It Organic Dark Chocolate + Fig Truffle

With GMO-free cane sugar



Seattle Shortbread Buttercream Frosted Shortbread Cookie

Clean and simple ingredients



Dean Foods' Dairy Pure Mix-Ins Cottage Cheese with Blackberries & Granola

Consumers say they want more natural sweeteners

59%

- Of US consumers say they would like to see more food and beverage with naturally sourced sweeteners

Sweetened with stevia



Fairlife Smart Snacks Rich Chocolate Nutrition Shake with Honey & Oats

Sweetened with stevia and monk fruit



Bulletproof Coffee Vanilla Latte Cold Brew Coffee with Collagen Protein

Major brands focus on low-sugar claims front of pack

Major yogurt brand
with claim on front of
pack

Major cereal brand with
the claim on front

74%

- Say a healthy diet should be low in sugar



Chobani Wild Blueberry
Flavor Less Sugar Greek
Yogurt



Pepsico's Quaker Lower
Sugar Instant Apples &
Cinnamon Oatmeal

Discussion of total sugars essential for consumer acceptance

57%

- Say It is misleading for a food product that is high in naturally occurring sugar to be labeled as "no added sugar"

**"No sugar added"
claim on front of pack,
21g sugar per serving**



Kind's Pressed by Kind
Mango Apple Chia Fruit
Bars

**"No sugar added"
claim on front of pack,
26g sugar per serving**



Lakewood Organic Pure
Fruit Tart Cherry Blend
Organic Fruit Juice Nectar

“Clean and simple” formulation often appeals to consumers

However,
48%

- Say a food labeled as 'no added sugar' is more appealing than one labeled as 'low/reduced sugar'

No added sugar, no
sweeteners



Hint Kick Black Raspberry
Infused Water

Just nuts, seeds, and
salt



NuttZo Organic Crunchy
Seven Nut & Seed Butter

Consumers don't like “artificial”—usually, but not always

60%

- Say artificial sweeteners are bad for your health

Sweetened with AceK and aspartame



Diet Coke Strawberry Guava Flavored Diet Soda

Full of lots of “chemicals”



Soylent Cacao Flavored Ready-to-Drink Meal

Artificial sweeteners have a place in food and drink

Sweetened with
sucralose



Great Value Diet Cranberry
Black Cherry Juice
Cocktail

Sweetened with AceK



Kroger Greek Light Vanilla
Nonfat Yogurt

However,
40%

- Say artificial sweeteners are a good way to reduce calorie content in food and drink

A few final thoughts

Balance

Consumers are looking for all types of products, with all types of benefits, trying to find balance in their diets. All types of sweeteners play a role.

Naturalness

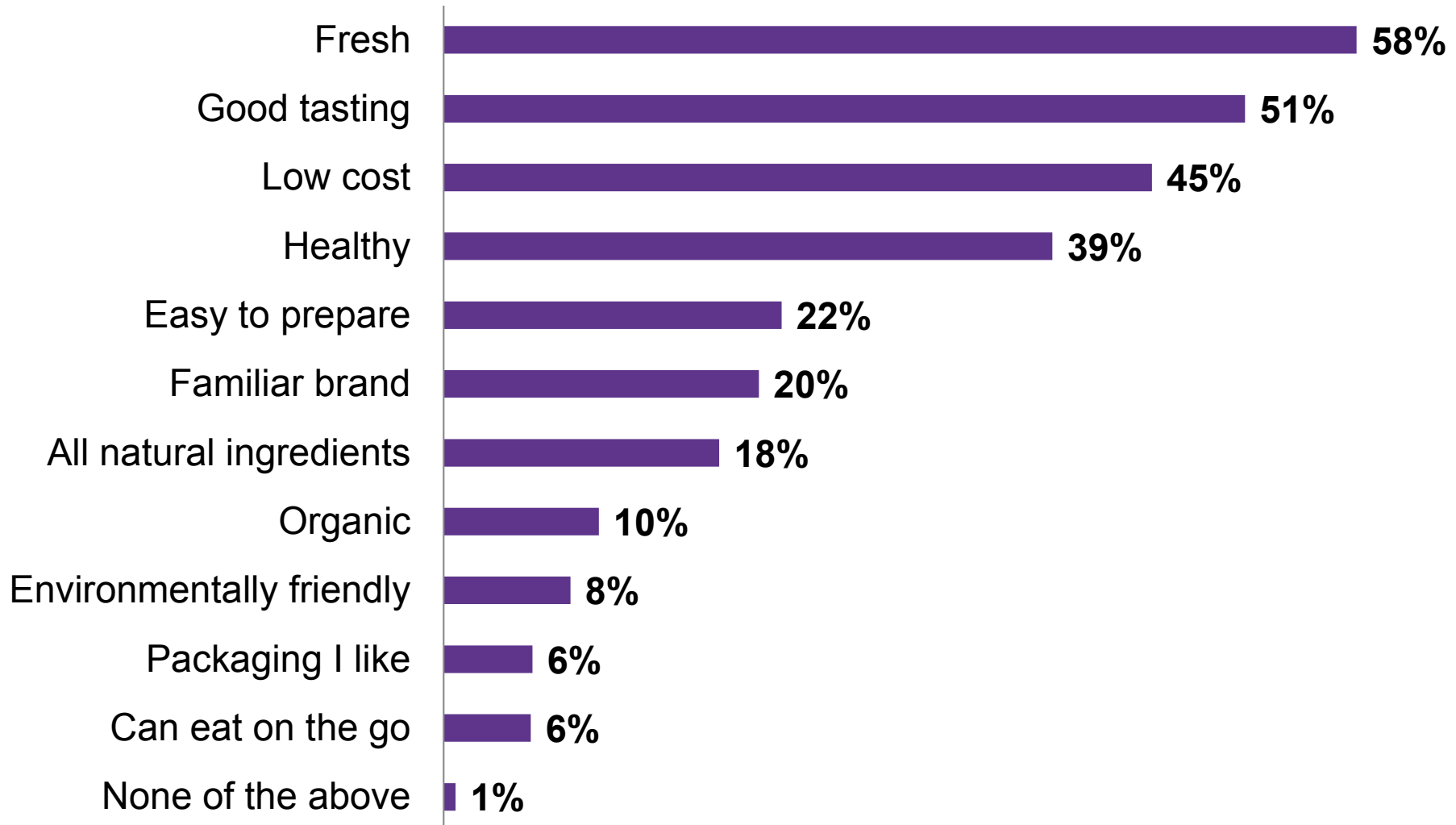
All types of products that promote their inherent “naturalness” resonate with consumers, and this extends to the sweetener ingredients used.

Communicate

Clear, simple communication is essential to consumers—they want to know why products include what they do and how they function.

But here is what is MOST important. Food must taste good!

Important factors when shopping for food, US



Thank you

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