

WHAT CLEAN LABEL MEANS?

GLOBAL SALES

\$165 billion

NORTH AMERICA
\$62 billion

Huge & Rising

2015 2016 2017 2018 2019 2020

GLOBAL SALES FORECAST

\$180 billion

INCLUDED CLEAN LABEL CLAIMS
+35% of NPL

WHAT ARE CONSUMER EXPECTATIONS?



- ✗ No High Fructose Corn Syrup
- ✗ No Artificial sweeteners
- ✗ No Preservatives
- ✗ No Artificial colors
- ✗ No Artificial flavors
- ✗ Short additive list
- ✗ No GMOs
- ✗ No Antibiotics

75%

of consumers avoid specific ingredients

98%

of consumers believe ingredients are an important consideration in the food products they buy

NO ADDITIVES OR ARTIFICIAL INGREDIENTS



+8.0% OF SALES

Consumers are looking for:

- ✓ Simplified formulas
- ✓ Transparency
- ✓ Visible whole ingredients
- ✓ Short ingredient list
- ✓ Pronounceable & recognizable ingredients (kitchen cupboard ingredients)
- ✓ Natural flavors
- ✓ Natural colors
- ✓ GMO-free
- ✓ Organic
- ✓ Traceability
- ✓ Designated origin

ORGANIC CLAIMS

+10% OF SALES

ALL-NATURAL CLAIMS

+7.8% OF SALES

85%

of consumers seek out superfoods

- BLUEBERRY
- AVOCADO
- QUINOA
- GREEN TEA
- CINNAMON
- GINGER
- POMEGRANATE
- MORINGA
- ACAI
- GREEN COFFEE
- PREBIOTIC

PERCEPTION OF THE LABELING



42%

of consumers said they rely on the product label as a source for helpful and accurate information about health and wellness

"When shopping for foods and beverages, I look at the product label to see if the food or beverage is **minimally processed.**"

- Ingredient lists
- Claims
- Nutrition facts panel

DECLARE:

72%

of Millennials

63%

of Gen X

59%

of Boomers

75%

of consumers review **ingredient list** to ensure it meets their dietary needs

67%

of consumers find it **challenging to understand** a package label

48%

of consumers consider themselves to be "not informed at all" after reading a product's label



- ✓ Organic
- ✓ Low sugar
- ✓ Natural
- ✓ High protein
- ✓ Whole grains
- ✓ Non-GMO
- ✓ Free-from artificial colors
- ✓ Free-from artificial flavors

- ✓ Low fat
- ✓ High fiber
- ✓ Low calorie
- ✓ Local
- ✓ Low carbs
- ✓ Sustainable
- ✓ Vegan
- ✓ Kosher
- ✓ Halal

91%

of consumers say that **descriptions that appear on packaging** influence what food products they purchase

Sources:

- Label insight survey (2017)
- Hartman Group, Health + Wellness report (2017)
- Nielsen, It's clear: Transparency is winning in the US retail market (2017)
- Euromonitor (2017)

