

CLEAN:

7 CONSUMER TRENDS THAT WILL DEFINE WHAT'S NEXT



what's
next?



hello my name is:

FONA & YOU: PARTNERS IN CLEAN

IT'S CLEAR: Consumers are choosing to eat more mindfully with a clear desire to understand the what, how and who behind what they eat. We hope the research shared in this report helps you get to your "what's next."

When it comes to that "what's next," know that FONA is ready to help you move forward. You're facing unique opportunities and challenges. It's a balancing act: You need to achieve great taste while also maintaining trust and achieving a clean label. We get it, and we can help.

Count on FONA for **TRANSPARENCY. ACCESS. SPEED.**

Let's talk today, and move your product forward. Call 630.578.8600 or chat live at fona.com/chat.

YOUR PRIORITIES ARE OUR PRIORITIES.
YOUR CHALLENGES ARE OUR CHALLENGES.



LET'S TALK

GUIDE TO CLEAN PERSONAS:

In March of this year we conducted a nationwide, proprietary survey with 525 consumers. We asked a series of questions to help us dig deeper to understand clean and consumers.

And from the data, we identified 4 key personas for clean.



View food as nourishment and carefully consider the food they eat and feed their family.



Choose to eat healthy most days but like to indulge time to time.



Aspire to eat healthy but sometimes fall back into their own way of eating.



Food is pleasure. They're aware they could eat healthier, but they're not overly concerned.

You've probably noticed—food and beverage product development is experiencing a time of great change. At the heart of much of it are two words that you've heard numerous times: clean label. But what does "clean label" mean for you, or more importantly, for your consumer? We might all have a different perception, and that gives clean label a life of its own as definitions span the spectrum for each individual company, product and brand.

Clean label has transitioned from an industry-only term to one that consumers are learning more about daily. Consumers feel passionate and confident. They believe they are educated about food issues yet they're concerned about what is left unknown. On the whole, consumers are looking to fit clean into the ultimate life goal: how to live longer while staying independent long-term. Just like us, consumers have individual, personal definitions of clean label.

Through broad research, we've identified seven key consumer trends for clean label that we believe reflect consumers' feelings and actions. Let's dive in!



DIVE IN!

what's trending inside:

BUILT ON TRUST



POWER TO THE PEOPLE



TASTE REIGNS SUPREME

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SEEK AND AVOID IS THE NEW M.O.



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BUILT ON TRUST



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BUILT ON TRUST

TAKE A LOOK AT SOME STARTLING STATS ON CONSUMERS AND TRUST IN THE FOOD INDUSTRY.



OF PURCHASE DECISIONS ARE AFFECTED BY PRODUCT TRANSPARENCY.³



94%

OF CONSUMERS EXPECT THE BRANDS AND MANUFACTURERS THEY BUY FROM TO BE TRANSPARENT AND UPFRONT ABOUT THEIR INGREDIENTS AND MANUFACTURING PROCESSES.¹



OF CONSUMERS WANT TO KNOW HOW THEIR FOOD IS PRODUCED⁴



OF CONSUMERS WOULD BE WILLING TO SWITCH BRANDS IF ANOTHER BRAND SHARED MORE DETAILED PRODUCT INFORMATION WITH THEM.⁵



75%

OF CONSUMERS DO NOT TRUST THE WAY BRANDS ARE CURRENTLY PROVIDING PRODUCT INFORMATION.²

TRUST: it's the foundation of any good relationship—built on character, integrity, communication and sometimes, a leap of faith. Trust is a factor in one of the most complicated and personal relationships consumers have—their relationship with food. Consumers view food as a bridge to health, making what they choose to put in their bodies matter more than ever.

Well-intentioned product labels or manufacturers' websites don't always tell the whole story. This leaves the consumer to seek information online, resulting in information overload or even lost sales and an even larger trust gap. Today, trust may be the deciding factor for a company's future success. If you gained 37% more customers because you were the brand that "shared more detailed product information," would that be such a bad thing? It's a good thing—trust us.

IN FOOD WE TRUST; IN COMPANIES.... WE AREN'T SO SURE

Let's touch a minute on the concept of food safety. Sixty-two percent of consumers believe food safety means food is "free of harmful elements."⁶ They want to be confident that what they are eating contains ingredients that have been produced according to standards, that it has been handled and prepared properly and more. The good news is that in 2016, nearly half of consumers polled are highly confident in the safety of the food they eat, up 15% from 2015.⁷

TRUST COMES IN TRANSPARENT PACKAGES

For consumers who are reading package labels more than ever, purchase decisions can boil down to packaging, including specific words used, a package's ingredient label and what's missing. While only 8% of consumers find a brand's marketing or health claims completely trustworthy⁸, 44% of them feel that 3rd party certifications such as green seals or the Non-GMO Project are somewhat trustworthy.⁹ One recent addition is the "Certified C.L.E.A.N." designation that lets consumers know a product is safe, minimally processed, ethical and more.



Where are consumers getting their information about food?⁷

CONSIDER DOING THIS

Fear not! There are opportunities to seek when it comes to consumers and trust. Transparency and forthrightness go a long way. Your best strategy: be thoughtful with your package labeling and conscientious with your communication strategies. Work with your flavor supplier to make sure you maintain taste while also maintaining consumer trust. Take a step back and examine where your organization is in this process.

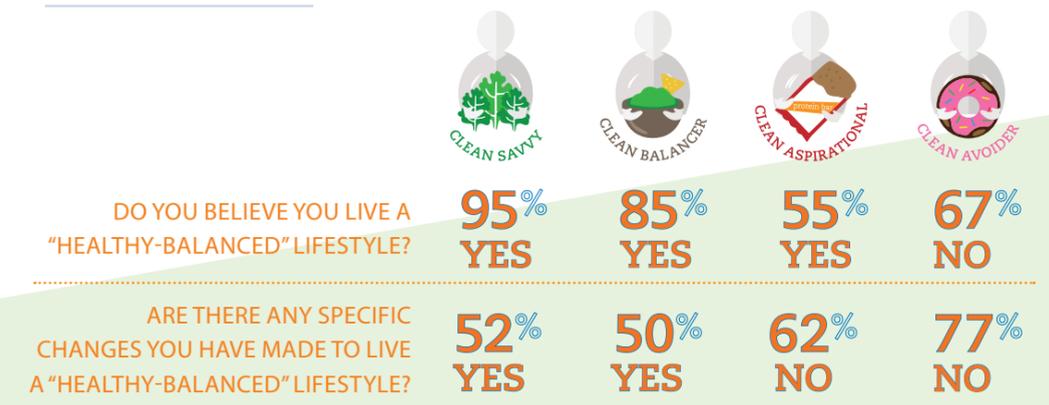


POWER
TO THE
PEOPLE

Consumers have gotten the message that it's necessary to self-advocate when it comes to personal health and wellness. More than ever, they feel empowered to take charge of their health to live a long life and live it independently. Reading food labels and understanding ingredients and product claims are just a few ways they are managing their diets and meeting daily health goals. Consumers are embracing their power and aren't shy about exercising it.

However, consumers reveal a newfound big-picture perspective. No longer is food intake examined only as a day-to-day consideration. Consumers are thinking about food as something that could affect them five, ten or twenty years from now. Seventy-five percent of the general population believe it is extremely/very important to lead a healthy, balanced lifestyle.¹⁰ With this belief in mind, we wanted to investigate consumers' healthy lifestyle goals further in our proprietary consumer survey.

 **PERSONA SPOTLIGHT**



SOME OF THE CHANGES CONSUMERS ARE MAKING TO LIVE A HEALTHY-BALANCED LIFESTYLE INCLUDE:

- EXERCISE
- ADDING ITEMS TO THEIR DIET SUCH AS FRUITS, VEGETABLES AND WATER
- REMOVING ITEMS SUCH AS SUGAR, SODA, MEAT AND ANYTHING ARTIFICIAL
- PRACTICING SELF-CARE
- READING PRODUCT LABELS

FOOD MANUFACTURERS AND ACTIVISTS

The influence of social media and mainstream media has had a hand in educating consumers about the potential risks from the food they eat. Somewhat of a chicken/egg conundrum, traditional food manufacturers are responding to consumer and activist cries for clean while smaller brands are coming clean right from the get-go. Consumer advocate organizations such as the Clean Label Project dissect categories like baby food and pet food to warn about potentially unsafe ingredients in products. Here are some activists that consumers are turning to:

Mark Bittman / former Op-Ed columnist for *New York Times* and author of over 20 books on the food landscape. Bittman's Vegan Before Six philosophy speaks to his passion for combining balance and plant-based eating.

Sarah Wilson quit sugar for life and made it her life's work to share what she knows through her 8-week program.

The Food Babe, **Vani Hari**, can be alarmist and anti-science, yet her blog attracts consumers and its influence cannot be ignored.

Michael Moss's work on safety, marketing, nutrition and the politics of food empower consumers to take control of their food choices.

Dr. Andrew Weil is a well-known advocate of integrative medicine. His blog examines food and health care trends.

CONSIDER DOING THIS.

Consumers are empowered by choices and have longevity on their minds. The good news? You can help them. Your product renovation and development strategies should consider the fact that consumers want to take charge and live long. Showcase how your brand gives them the power to put themselves first for the short or long-term.

REBALANCING THE RATIO



Back in the day, moms prepared meals for their families with fresh ingredients sourced from their local butcher, meat vendor or backyard gardens. As wartime pressures mounted, many of these same moms entered the workforce changing the landscape of mealtime. Food storage changed and technology and preservatives extended expiration dates while broadening convenience. Enter the era of processed food.

Flash forward to today, and many consumers now associate processed foods with less-than-optimal nutrition profiles and artificial ingredients they can't pronounce. Rebalancing the ratio of ultra-processed foods vs. less processed foods is something consumers are doing to help them meet long-term health goals. Terms like "shopping the perimeter" have become standard practice for more shoppers as 64% of consumers seek foods that are minimally processed.¹¹ It seems to be working as perimeter food sales are expected to increase 17% to \$346 billion by 2019.¹² Additionally, consumers are reaching for organic products because they perceive them to be safer, more nutritious and fresher than non-organic products.



THE CASE FOR BEING ON THE OUTSIDE

Never before has being on the outside felt so good. More and more, when it comes to grocery shopping, the outside is where it's at. The perimeter is where grocers are stocking ready-made fresh meal kits, bushels of organic fruits, vegetables, meats, eggs and herbs. Check out these locales that help busy consumers create the healthy balance they crave.

- The growth of the "grocerant" plays heavily into the success of concepts like Chicago-based Mariano's which continues to add locations. Heavily focused on produce and fresh prepared foods, the store is part grocery, part restaurant. Their target: busy Millennials who don't have time to fix a meal at home yet want fresh food and are willing to pay extra for it. Dine in or take home, this concept is poised to please the 84% of consumers who aren't sure at noon what they're eating for dinner at 6.¹⁴
- Chicago's O'Hare airport has 26 aeroponic towers growing fresh herbs and vegetables that are used throughout their food service posts. The soil-less towers house plants fed via water loaded with nutrients and minerals. Forget what you think about airport food.
- For the 62% of consumers who consider food as "medicine for their body," organic delivery can't make it any easier to get what they need.¹⁵ Online farmer markets deliver organic produce. Concepts like Door-to-Door Organics bring organic meats, cheeses, produce and even center-of-the-store groceries right to the front door. Customers can even order local or non-GMO items. And if shopping isn't enough, organic meal kits like Green Chef make it easy to honor a commitment to purchase organically.

CONSIDER DOING THIS.

Maybe you're on the inside track with newly created fresh products or maybe your brand is in the reformulation process. Either way, overly processed foods are losing points with the clean-seeking consumer. Whether it's through packaging or ingredients, have a plan to freshen things up. Consumers, especially Millennials, are willing to pay a little extra for products that meet their clean-eating and meal-prep standards.



60% ARE SHOPPING THE PERIMETER MORE
43% ARE SHOPPING THE CENTER OF THE STORE LESS



- Fresh Vegetables **19%**
- Fresh Fruits **18%**
- Poultry **11%**
- Dairy Products milk, yogurt, cheese **10%**
- Whole Grains quinoa etc. **9%**
- Red Meat **8%**
- Seafood **8%**
- Prepared Foods in store meals kits & convenience foods **6%**
- Processed Foods pre-packaged foods **4%**

"WHAT PERCENT OF YOUR CART IS ORGANIC?" **39%**

PURCHASED ON PRINCIPLE

Thanks to social media, communicating a corporate personality is easier than ever. Behind a corporate identity are intrinsic values and ethics, positions on sustainability, approach to safety and ingredient sourcing and its treatment of employees; relating to a company's values and philosophies goes a long way to inspiring consumer loyalty. And today's consumer loves the idea of supporting companies to which they feel connected—especially Millennials. Fifty-seven percent of this influential group typically buys from companies whose values line up with their own and that goes for 45% of the other consumer population.¹⁶

What is interesting is the extent to which consumers will adjust their perceptions of a company based on their ethical or environmental stance. Fifty-nine percent of consumers believe in supporting products which have high ethical and environmental report cards.¹⁷ Many smaller brands start from a place of social responsibility and because of that 32% of consumers prefer the local or smaller brand to the mass market one.¹⁸ There also seems to be an association by consumers between ethical and premium, as 21% link the two.¹⁹ Finally, 44% of shoppers would be willing to pay more for products that they feel support their values or have a certain belief.²⁰ Manufacturers would benefit from not underestimating the power of principle in their corporate persona.

BRANDS WITH HIGH SOCIAL RESPONSIBILITY GRADES

PEPSI: Named one of the top brands for social responsibility, Pepsi's "#howwillwe" campaign highlighted solutions and steps the company is taking to address the global food crisis, thrive as a society and create opportunities. Through its Food For Good program, Pepsi has provided 2.6 million meals to low-income people in 11 U.S. cities and over 12.6 million servings of grains, dairy and vegetables.²¹ In its partnership with the World Food Program, Pepsi has distributed dimbuch, a chickpea-based supplementary food, to malnourished children aged 6 months to 5 years and is making a world of difference. And Pepsi's parent company, Frito-Lay is doing its part for the environment by owning one of the largest fleet of electric delivery trucks.

STARBUCKS : The driving force behind the coffee magnum's FoodShare program was its own employees. Recognizing the amount of perishable foods disposed of within their stores each day, employees urged Starbucks to look beyond the cup. The program, launched in 2016, will distribute 5 million meals via refrigerated trucks to foodbanks its first year and almost 50 million meals by 2021.

WHOLE FOODS: The high-end organic retailer joined forces with Imperfect Produce to sell "ugly" fruits and vegetables in their stores to help end the glut of food waste in the U.S. The program is in the pilot stages in Northern California at six locations.

A FEW STATS:

42%

OF THE GENERAL POPULATION INDICATED THAT THEY MAKE DECISIONS WITH AN UNDERSTANDING OF THE EFFECT THEY WILL HAVE ON THE HEALTH AND SUSTAINABILITY OF THE WORLD, ITS ENVIRONMENT AND PEOPLE.²²

45%

OF CONSUMERS INDICATE THEY USUALLY BUY PRODUCTS FROM COMPANIES WHOSE VALUES ARE MOST LIKE THEIR OWN.²³



1 IN 4 CONSUMERS INDICATE THEY HAVE STOPPED PURCHASING FROM A COMPANY AFTER LEARNING THE COMPANY DID NOT PRACTICE SOCIAL OR ENVIRONMENTAL RESPONSIBILITY.²⁴

CONSIDER DOING THIS.

Consumers like purchasing from brands and companies whose values they feel mirror their own and satisfy their personal health mission. An interactive and strategic communication plan that conveys a dedication to social responsibility, sustainability and ethics will impress the consumer dedicated to purchasing on principle.



4

SEEK AND AVOID IS THE NEW M.O.



Going clean is a conscious decision for many consumers, requiring a lot of studying for successful shopping and food prep. But hand-in-hand with clean eating is avoiding perceived “highly processed” foods that usually contain a long list of ingredients that consumers can’t pronounce. For manufacturers, the challenge is managing product and label reformulations to meet the always changing list of ingredients consumers are eliminating while anticipating what’s next. Add to this consumers’ confusion surrounding claims, like “natural,” or limiting their label reading to the front of the package vs. the back and you have the potential for a lot of misinformation.

STUDYING THE LABEL TO EAT WITH A PURPOSE

When it comes to reading product labels, consumers aren’t necessarily studying packages with a magnifying glass but seeking out a few things of value specifically to them. The idea of purposeful eating is giving consumers a sense of control, and package labels help them with this practice. About 58% of consumers focus on one or two key things, while 70% are attracted to products with the fewest number of ingredients.²⁵ Claims like “natural” seem to bring the most confusion with consumers all over the board between believing it means free from synthetic ingredients (51%) to contains real ingredients (54%), or is free from preservatives (54%).²⁶

Consumers manage a balancing act between seeking and avoiding ingredients throughout their days. What ingredients are attracting the most attention?



THE ELIMINATION GAME²⁷

Reading those labels is done with intention. Consumers want to know that the products they are consuming don’t contain unwanted ingredients. A few stats regarding what consumers are avoiding:

- 53%** are trying to limit the amount of sugar in their diet
- 61%** are concerned about the negative side effects of artificial sweeteners
- 56%** are trying to limit GMO’s in their diet
- 68%** are trying to limit the pesticides in their diet



SEEK AND YOU SHALL FIND HEALTH²⁸

Consumers are looking to add an array of ingredients to their diets to improve overall wellness and address specific health concerns.

- 59%** of consumers seek out foods that are high in protein
- 47%** would like to get more fiber in their diet.
- 87%** of consumers indicated they had used good fats such as avocados, nuts and olive oil in the past year



51% CURRENTLY AVOIDING SPECIFIC INGREDIENTS IN FOOD/BEVERAGE PRODUCTS.

HERE’S WHAT THEY ARE AVOIDING:



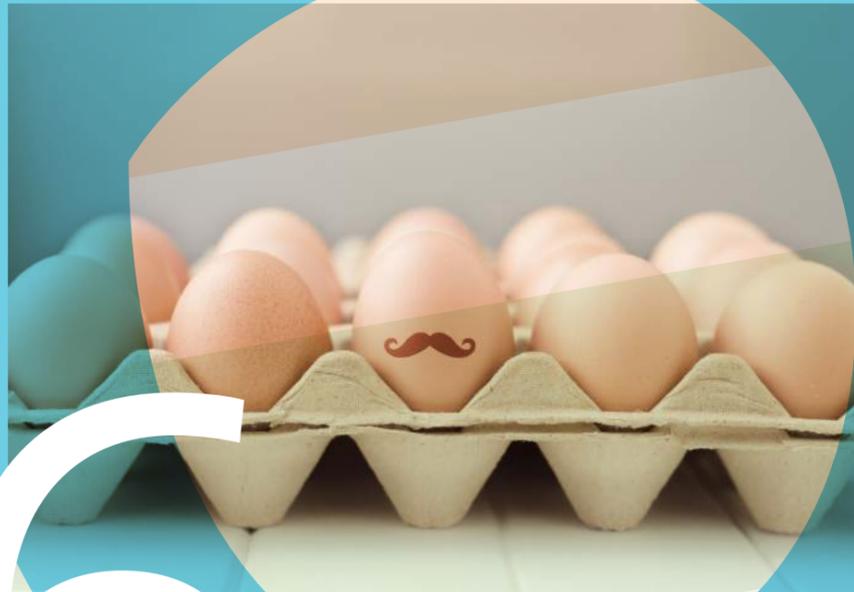
CONSIDER DOING THIS.

Consumers consciously seek and avoid as part of a health driven and clean-eating strategy—sometimes simultaneously or exclusively. While what is being sought or avoided might change over time based on shifting trends, it is important to be aware that consumers are fickle in their eating as they pursue good health.

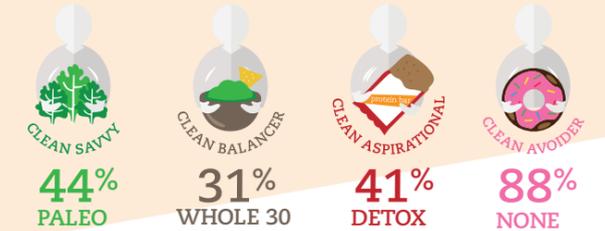
ONE SIZE DOES NOT FIT ALL

There is nothing more personal than choosing what one eats every day. Even colleges and universities across the country have made it easy for students to design a meal in a food court atmosphere as if they were at home (or Chipotle). Face it — consumers want their food to be as customizable as possible no matter the source, especially when they are aligning themselves with a diet principle or plan like Paleo or have specific medical issues such as IBS that require certain diet modifications. And their shopping habits and preferences lean toward customizing around the lows—as in low sugar, low fat and low calorie. Meanwhile, some consumers prioritize their lifestyle choices such as organic or vegan. No matter the preference, it's clear that one size does not fit all when it comes to food choices.

The market is evolving to the point where consumers will demand truer personalization that provides them with control over the production process or creates a product that is truly specific to their unique needs. Here are some unique, fresh innovations where manufacturers are putting the personal stamp on their products.



WHAT DIETS DID OUR RESPONDENTS EXPERIMENT WITH IN THE PAST 30 DAYS? CHECK OUT THE FOOD PLANS THAT APPEAL TO OUR PERSONAS:



A WORTHWHILE HABIT

Campbell's is the sole investor in the startup company Habit, a personalized nutrition and meal delivery system. Based on assessing a consumer around 60 different biomarkers along with nutritional blood markers, response to a metabolic challenge drink, and personal health goals, Habit prepares a customized meal plan to maximize health, physical and emotional well-being. Habit and Campbell's believe that this new era of personalized nutrition built around science and technology will change the way consumers eat forever.

GET TO KNOW LOW-FODMAP

Move over gluten and dairy-free...low-FODMAP is the next consumer ingredient discernment. Singling out short-chain carbohydrates that cause intestinal distress for consumers, including those with IBS, researchers may have found the next layer in the quest for "what not to eat." The acronym stands Fermentable, Oligosaccharides, Disaccharides, Monosaccharides or Polyols and expect it to become as familiar as gluten-free. Nestlé is so convinced of the impact of a low-FODMAP diet they created ProNourish, a nutritional RTD that doubles as a snack. Soon to be available in the grocer, ProNourish is expected to be the first of many low-FODMAP products. And recently spotted at Natural Products Expo West were FODMAPPED For You, a line of sauces and soup stocks and FODY, whose products include sauces, bars and trail mix.

CONSIDER DOING THIS.

Whether or not customized and 3D printed food will be reality this year or in the coming years, it's clear that consumers are ready for things to be all about them. Creating options that allow consumers to easily personalize their diets to satisfy their various health challenges will win loyalty. It's no longer a one size fits all world.

TASTE REIGNS SUPREME



Who says people can't change? Because when it comes to the idea of taste, U.S. consumers certainly have. We've seen a love for sweet become mad cravings for sour (as evidenced by the acceptance of kombucha and kimchi.) At the same time, healthy products are no longer relegated to the odd shelf in the grocery but instead mix in with traditional CPG items, challenging them on tastiness. Ultimately, taste is the decision maker for 64% of consumers who indicated it is the most important attribute regarding foods and beverages their household consumes.²⁹

ULTIMATELY, TASTE
IS THE DECISION MAKER
FOR **64%**
OF CONSUMERS

TASTE MATTERS. CLEAN MATTERS.

Deciding to "go clean" presents challenges for manufacturers regardless of whether they are reformulating or formulating clean from the ground up. These challenges include things like PDP, ingredient statement, cost, technical trade-offs such as flash-point and shelf and flavor profile. Recognizing the importance of these variables, FONA helps its customers get to the best solution that checks off all the boxes.

YOU WANT A GREAT TASTING CLEAN PRODUCT THAT MEETS YOUR TARGET CONSUMERS' NEEDS.

THIS LEADS TO QUESTIONS:

- What words or pictures do you want on the front of pack?
- Can you make a Non-GMO or organic claim?
- Do you have a goal for the ingredient statement?

THE ANSWERS

to these questions truly determine your options. Opportunities moving forward depend on a host of factors. Any flexibility in one area or possible adjustment opens up a new path with new options — and new trade-offs. Is there flexibility with your label? Your taste profile? Your ingredient statement? Your budget? All of these are essential considerations to move forward.



PDP & INGREDIENT STATEMENT:

You may have a wider toolbox than you think. Carefully consider your labelling goals and communicate them early in the project process.



COST:

Beware of cost implications from the start. Clean raw materials can cost more, and getting to the right profile can mean a higher usage.



TECHNICAL TRADE-OFFS:

FLASH POINT: The flash point for a flavor can be affected depending on the flavor form and its organic status. Although a challenge for some applications, the use of oil soluble flavors (if acceptable) are one option for moving forward.

SHELF LIFE: Due to different carriers, shelf life can be reduced for organic suitable and organic certifiable, oil soluble flavors. Natural flavors and extracts that contain essences or juices may experience reduced shelf-life as well as potential changes to storage parameters.

CONSIDER DOING THIS.

Consumers want their food to be it all: clean, healthy and great tasting. To maintain growth, we must navigate the taste trade-offs while playing into consumers' desire for sweet, sour, savory or salty. With a plan in place and the right guide by your side, capitalizing on clean label will be smooth sailing.



THOUGHT LEADERSHIP: THE CLEAN CURATORS

With everything you do, we know that it can be hard to step back and examine the “Big Picture.” With that in mind comes FONA’s dedicated Thought Leadership team.

We’re here to walk you through “what’s next.”

A unique proposition in the flavor industry, Thought Leadership is committed to exploring clean and curating thought-provoking content for you. We’re going beyond trends, creating exclusive Clean Consumer Personas and a *Shopper Insights Panel* to give you front row seats to consumers’ beliefs and practices on clean, taste, flavor and beyond. We hope our latest deep dive into clean gives you the knowledge and information you need. Let us help you become the **clean curator** for your team, and move forward into what’s next!

At FONA, we’ve been talking clean for a long time. We want to be the flavor company that makes your job easy. Count on us for:

TRANSPARENCY. Engage with our subject matter experts and we’ll share our clean knowledge and figure out your customized plan for flavors and extracts.

ACCESS. Your team just got bigger. Let’s examine your technical, regulatory and, most importantly, taste requirements to deliver a complete flavor solution.

SPEED. We are committed to getting you what you need faster than ever.

Let’s talk today, and move your product forward. Call 630.578.8600 or chat live at fona.com/chat.



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