



INGREDIENT HOT LIST: GETTING EARTHY

2019 • TREND INSIGHT REPORT

If you're looking to see the next phase of the clean label movement in action, look no further than consumers' interest in foods that "go back to basics." Today's wellness-focused consumers are looking for ingredients that check all the boxes for them: perceived naturalness, nutrition, sustainability – and it certainly helps if it feels *new and different*. Let's check out a few of the earthy ingredients making waves in our latest Ingredient Hot List. Is one of these right for your products and consumers?

HEMP SEED

There aren't too many ingredients with a more "earthy" perception than hemp. Hemp is a form of cannabis with lower THC levels than marijuana – the strain of cannabis without psychoactive (high-inducing) properties. Hemp seeds – those hard seeds inside the hemp plant – contain amino acids, protein and omega-3 fatty acids. According to *Bon Appetit*, the seeds pack some serious nutrition with "a pleasantly nutty taste, like a cross between a sunflower seed and a pine nut."

Primed for growth

According to the *Washington Post*, hemp is expected to grow into a \$20 billion industry by 2022. In the U.S. hemp farming just became a little easier; In late 2018, the new Farm Bill was signed into law. One part: hemp's removal from the Controlled Substances Act, thus removing the DEA's involvement in hemp cultivation.

Hemp is a cross-category consideration. According to *Food Navigator*, the biggest hemp food segments are nuts/trail mix/dried fruit, followed by shelf-stable plant milks, cold cereals and wellness bars/gels. The fastest growing segments are frozen desserts, refrigerated meat alternatives and both functional beverages and RTD tea and coffee.

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“There hasn't been a year in the last seven where there hasn't been double digit growth.”

– VoteHemp's Eric Steenstra to FoodNavigator

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CONSUMER SENTIMENT & DEMOGRAPHICS

Consumers are on board with hemp seed as a food and beverage ingredient overall. Hemp products received a rating that was 16.8 percentage points higher than non-hemp products for the attribute Healthy, followed by Natural with a difference of 13.5 percentage points.

The ingredient also enjoys a positive perception on social media platforms. The sentiment in posts mentioning “hemp seed” is overwhelmingly positive at 85% of posts. Drilling into the demographics of those posting about hemp seed, the top interests are 1) vegan food and drink; 2) desserts and baking and 3) nutrition. The average income of these users is around \$60,000 and 61% of them are women.



85%
SUBJECT
SENTENCES
POSITIVITY ON
SOCIAL MEDIA

Source: Infegy

Hemp Seed Product Releases

Between 2017 and 2018 alone, there was a 14% increase in product launches with hemp seed ingredients – a number that’s sure to grow in 2019 with looser regulations around the industry.



Creative Snacks Almond Clusters are baked with chia, hemp, pumpkin & sunflower seeds. USA



New Belgium The Hemperor HPA Beer is described as a hoppy ale with hemp seed and natural flavor. USA



Luna & Larry's Coconut Bliss Vanilla Sandwich contains hemp seed chocolate chip cookies sandwiched around creamy non-dairy coconut ice cream. USA

MORINGA

Moringa is a fast-growing tree native to South Asia but now grown around the world. It's *truly* a super food, notes *New York Magazine*, saying that while the marketing around some superfoods may seem silly, this plant in particular should be taken seriously.

"Almost the entire tree is edible. The leaves are cooked like spinach. The seedpods are edible when young, usually boiled. The seeds are edible when immature or mature; they look sort of like tiny footballs. The seeds can also be pressed for their oil. The roots are edible, with a spicy flavor reminiscent of horseradish."

Research from the University of California Davis shows that the leaves are high in vitamins A and C, calcium, zinc, magnesium and potassium. Researchers also see the plant as a strategic crop in the face of global warming – it is drought tolerant and can grow year-round in sandy soils.



78%
SUBJECT
SENTENCES
POSITIVITY ON
SOCIAL MEDIA

Source: Infegy

Consumer Sentiment

How do consumers feel about moringa? Overwhelmingly positive, at least according to the social media mentions we're tracking. Mentions of the ingredient are up 120% since 2015, and enjoy sentiment that is positive 78% of the time.

When asked about their likelihood of purchasing products that include moringa: those products received a rating that was 14.7 percentage points higher for the attribute Healthy, followed by Natural with a difference of 14 percentage points. These ratings are compared to foods and beverages that make no mention of moringa.

Products featuring moringa have grown steadily (250%) since 2014. And the rate continues to climb: Between 2017 and 2018 alone, there was an 18% increase in products using moringa.



Moringa Superfood Crunchy Almond

contains a 1/2 cup of Moringa leaf in each bar. Vegan, GMO- and gluten-free product. According to the manufacturer, every product purchased helps plant moringa trees and support women around the world. Mexico



A Zest of Haiti Moringa Honey is made employing bees which have been developed to only produce honey from Moringa nectar. Canada



Just Made Mango Moringa Juice is a non-GMO, cold-pressed juice is suitable for vegans. This product contains 99% juice and no added sugar. According to the manufacturer, for every bottle sold 5 cents is donated to provide training and support to teachers in farming communities. USA

ASHWAGANDHA

Bon Appetit calls it “the most prolific adaptogen, thought to strengthen the body’s ability to cope with stress.” Some studies attribute additional benefits to the ingredient, such as endurance and immunity. A distant cousin to tomatoes and eggplants, it’s also called Indian ginseng and winter cherry.

Ashwagandha has shown clear growth in recent years, in both consumer awareness and product offerings. And generally, experts seem to agree that ashwagandha does in fact have a calming effect on users. But the passion of loyal consumers may be the ingredient’s biggest asset. Take Tara Goodrum of Greatist for example. Although she writes off many superfoods and pure marketing bunk, she swears by ashwagandha:

“If I were T[aylor] Swift, I’d write a love song about ashwagandha. What the multi-faceted herb lacks in taste—it’s bitter and pungent and has a bit of a stench—it makes up for in benefits, and science-backed ones at that.”

Consumer Sentiment

When asked about their “intent to purchase,” consumers aren’t completely sold on products containing Ashwagandha. Although products with the ingredient were viewed overall as generally tasty and convenient -- they weren’t seen as being good value or fun. The only marker which ashwagandha products outperformed non-ashwagandha-containing products is “healthy” – and only by 3.7%.

Women more interested in Ashwagandha

Breaking social media mentions down by gender, the female voice accounts for 64% of mentions. They’re also more positive overall about the ingredient, with 84% of social posts by women having positive sentiment (compared to 75% of men’s ashwagandha posts.)



64% FEMALE VOICE

**84% POSITIVE SENTIMENT
16% INDIFFERENT OR
NEGATIVE SENTIMENT**

Source: Infegy

ASHWAGANDHA *CONTINUED*

Product Releases

GNPD shows a 109% increase in ashwagandha products between 2017 and 2018 alone (and a 360% change 2014-2018).



Tandoori Turmeric Activated Superfood Popcorn is a probiotic snack and features spices like coriander, cumin, turmeric extract and ashwagandha extract.



Garden of Life Organic Fit Chocolate Almond Brownie Flavor High Protein Weight Loss Bar is USDA certified, and features organic Svetol green coffee bean extract and 150mg of organic ashwagandha.



TAKEAWAYS

Consumers' quest for nutrition-rich and "back to basics" ingredients is intricately connected to their search for longevity and independence (much like the clean label movement as a whole.) What, if any, of these earthy ingredients are right for your product development? Hemp is primed to be huge (slated for 400% growth in the coming years.) Ashwagandha garners passionate loyalty – but comes with inherent taste challenges that may require taste modification and custom flavor work to overcome. If your consumer prioritizes social welfare and sustainability – perhaps moringa is more up their alley. Whatever direction your development take you – there is one universal truth that consumers tell us time and time again: taste matters. Make it a priority in your development when working with these earthbound, popular ingredients.

YOU DESERVE MORE. LET'S GET STARTED.

What does true partnership look like? You deserve a flavor partner ready to turn these trends into the tangible.

Let FONA's market insight and research experts get to work for you. Translate these trends into bold new ideas for your brand. Increase market share and get to your "what's next." Our technical flavor and product development experts are also at your service to help meet the labeling and flavor profile needs for your products to capitalize on this consumer trend. Let's mesh the complexities of flavor with your brand development, technical requirements and regulatory needs to deliver a complete taste solution.

From concept to manufacturing, we're here for you – every step of the way. Contact 630.578.8600 to request a flavor sample or chat us up at www.fona.com/contact-fona/

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