FMCG GURUS

TOP TEN TRENDS FOR 2022

January 2022







Path to Net Zero

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Consumers are becoming more conscious about environmental issues such as carbon emission and food waste, and are taking proactive steps to address this – expecting brands and retailers to mirror these actions

1. Path to Net Zero

Focus on resourcefulness and reversing environmental damage

Less is More | Upcycling Future | We Want Carbon Neutral | No to Food Waste

Consumers are placing more emphasis on being resourceful, with a focus on purchasing only products that they deem necessary and that do not have a negative impact on the environment.

Proportion of consumers who say it important that packaging helps prevent food waste. 2021



Consumers recognize that they are unnecessarily contributing to food landfills through traits such as not storing products properly or simply leaving them in the pantry and forgetting about them. As such, they are looking to cut down on unnecessary excessiveness and purchase/use only the amount of food they need. Food waste at the industry level is something that resonates strongly with consumers, who want brands and retailers to reverse the trait of what is deemed to be throwing food away unnecessarily.

Proportion of consumers who say that they find the concept of upcycled ingredients appealing. 2021



Consumers like the concept of upcycled ingredients as they are seen as something that can help address food waste. They are also dissatisfied with brands and retailers unnecessarily throwing away what they deem to be perfectly edible food and want this rectified.



1. Path to Net Zero

Focus on resourcefulness and reversing environmental damage

Less is More | Upcycling Future | We Want Carbon Neutral | No to Food Waste

Upcycled ingredients are seen as appealing by consumers because they are seen as a proactive way of reducing food waste along the supply chain, through brands being more resourceful.

You state that you find the concept of upcycled ingredients appealing. Why is this? 2021 Global – consumers who find these ingredients appealing



As well as the ethical and environmental credentials, upcycled ingredients are associated with being natural and potentially offering cost savings, resulting in a win-win scenario for the consumer and the planet. Consumers are actively addressing the issue of food waste, realizing that they are unnecessarily contributing to landfills. As well as the link with sustainability, people also recognize the financial benefits of this.

Consumers are actively looking to reduce their levels of food waste through traits such as cooking from scratch more. As well as the environmental benefits of this, they also have the additional motivation of the financial benefits associated with such behavior in a challenging economic environment.

Proportion of consumers who say that they have made greater efforts to reduce food waste over the last two years. 2020





43%

of global consumers say that they research about the carbon footprint initiatives of brands.

1. Path to Net Zero

Focus on resourcefulness and reversing environmental damage

Less is More | Upcycling Future | We Want Carbon Neutral | No to Food Waste

24% of global

consumers have

boycotted brands

over ethical

credentials

63% of global

consumers have

made attempts to

reduce their carbon footprint _____

Carbon emission is a major concern to consumers at a time when they witness firsthand consequences of global warming and the impact it has on the planet.

Are you concerned about any of the following? 2020 Global – Top five concerns



Firsthand exposure to environmental changes as a result of global warming is worrying consumers, especially as they deem health and sustainability to be interlinked. As such, they want brands to be transparent over carbon emission levels and proactive in looking to offset levels produced. Consumers are making active attempts to reduce their carbon footprint impact, and this will drive demand for brands that mirror their attitudes and outlook on life.

As people recognize that individual actions can help limit/reverse damage done to the planet, they are taking active steps to behave in a more sustainable manner – looking to address their own carbon footprints and minimize their output where possible.

In the last two years. 2020



70% of global consumers look for reduced carbon footprint claims on packaging (2020)

32% of global consumers have made attempts to reduce their energy levels (2020)





1. Path to Net Zero

Focus on resourcefulness and reversing environmental damage Less is More | Upcycling Future | We Want Carbon Neutral | No to Food Waste

Brands are no longer focused just on reducing/eliminating carbon footprint but looking to try and offset more carbon emission than they produce.



BrewDog



Upcycled



Renewal Mill



Imperfect Foods

Brands are using upcycled ingredients as point of differentiation. As well as the sustainability credentials, this helps create perceptions of ethical elitism, appealing to consumers who associate sustainability with self identity.



Destination Health



Consumers are taking a holistic approach to health, looking to boost their physical and cognitive wellbeing and seeking out ingredients that offer a health boost beyond basic nutrition

2. Destination Health

Proactive approach to addressing physical and mental wellbeing

Follow Your Gut | Feel Good, Look Good | Happiness is Health | Positive Nutrition

The prevalence of digestive health problems continues to grow across the globe whilst at the same time, consumers are recognizing the impact that this has on other areas of health.

Top five digestive health problems on a regular basis. 2020 Global



Factors such as an ageing society and poor dietary and lifestyle traits mean that digestive health problems are becoming more common. As well as this causing embarrassment and an inability to relax in the short-term, people are also recognizing the impact it has on long-term health. This is driving demand for products that aid the digestive system. Consumers believe that society can have tightly defined perceptions of what constitutes beauty and want to redefine this, with a focus on making the link between health and appearance.

I am satisfied with my current skin health. 2021



I recognize the link between skin health and overall health. 2021



Consumers feel that society can have unfair and narrow stereotypes around what constitutes attractiveness, something that can have a negative impact on confidence. As a result of this, they are adopting a broader approach to what constitutes beauty, looking to make a direct link between good overall health and emotional wellbeing.



2. Destination Health

Proactive approach to addressing physical and mental wellbeing

Follow Your Gut | Feel Good, Look Good | Happiness is Health | Positive Nutrition

People are placing more emphasis on emotional wellbeing, especially as they recognize that happiness doesn't just impact mood and energy levels but can have a positive impact on long-term health.

Proportion of consumers who say that they are satisfied with their cognitive health



2018 2021

High levels of uncertainty have had a negative impact on the emotional wellbeing of people over the last eighteen months, resulting in increased levels of stress and anxiety and poor sleep health.
Consumers are looking to address this, especially as they recognize that poor emotional wellbeing and feelings of fatigue can result in people being more vulnerable to illness.

Increased attentiveness to ingredients means that consumers are actively seeking out ingredients which they associate with offering a health boost beyond basic nutrition.

Proportion of consumers who have turned to food to boost immune health in the last month. 2021



Consumers are actively seeking out food, drink, and supplements that help address health problems – even if they are not suffering from specific symptoms. This is resulting in consumers taking a greater level of interest in ingredients that offer a health boost beyond basic nutrition and seeking out products positioned around active health claims.



73%

of global consumers say that they experience feelings of stress at least some of the time.

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2. Destination Health

Proactive approach to addressing physical and mental wellbeing

Follow Your Gut | Feel Good, Look Good | Happiness is Health | Positive Nutrition

(2021)

Consumers would like to improve a variety of areas of wellbeing as they adopt a proactive and holistic approach to health, whilst realizing current diets are not as healthy as they should be.

What areas of your health would you like to improve over the next twelve months? 2021 Global – Top five answers



Consumers are taking a proactive approach to health, wanting to address a variety of wellbeing issues. In addition, people recognize that mental health and energy is just as important to overall wellbeing as physical health, with tired and run-down people being associated with having a weaker immune system.

Changes to dietary habits are deemed one of the most effective ways of improving health, especially as many recognize that eating and drinking habits are increasing the risk of long-term health problems.

Behavioral traits such as reliance on convenience products, a lack of monitoring nutritional intake, and over-indulging, is increasing the risk of long-term health problems, something that consumers are actively looking to address



44% of global consumers are seeking out functional food more frequently (2021)

27% of global consumers have increased their intake of vitamin C in the last two years (2021)





Proactive approach to addressing physical and mental wellbeing

Follow Your Gut | Feel Good, Look Good | Happiness is Health | Positive Nutrition



Koso



Bio & Me



Symprove

Increased focus on digestive health will result in an increase in awareness of prebiotics, postbiotics, and Synbiotics, as consumers seek to maximize their intake of beneficial bacteria.

Consumers will look to maximize their intake of ingredients associated with offering a health boost beyond basic nutrition, products that promote multifunctional benefits will be of high appeal.



Holland & Barrett



Conscious Indulgence



Consumers want to enjoy uncompromised moments of indulgence for reward and escapism purposes. At the same time, they do not want these moments to conflict with wider health goals



3. Conscious Indulgence

Switching between compromised and uncompromised indulgence

Taste the Victory | Live in the Moment | Balance is Key | Think Before You Eat

Consumers are becoming more demanding of the products that they purchase, even when it comes to everyday items, and want a genuine experience from the products that they buy.



Exposure to more products than ever before means that consumers are becoming more difficult to impress. Moreover, people want products to offer a genuine experience, even when it comes to everyday food and drink. As a result of this, brands need to look to innovate to create genuine stand out appeal. Irrespective of concerns about health, there are moments when consumers like to enjoy moments of indulgence where they pay little-tono attention towards nutrition as focus is on enjoyment.

Proportion of consumers who say that they like to enjoy the occasional moment of indulgence where they pay little-to-no attention to nutritional intake. 2021



Irrespective of concerns about health, there are moments where people like to enjoy pure moments of hedonism for reward and escapism purposes. When enjoying such moments, nutrition is not a priority and taste is paramount. This will drive demand across product categories that push the boundaries of indulgence.





3. Conscious Indulgence

Switching between compromised and uncompromised indulgence

Taste the Victory | Live in the Moment | Balance is Key | Think Before You Eat

When it comes to health, people tend to adopt a debit and credit approach to wellbeing, leading a healthy lifestyle most of the time to enjoy the occasional moment of pure indulgence.

Whilst trying to eat and drink healthier, consumers want to avoid feeling moments of compromise and sacrifice. As a result of this, consumers are looking to lead a well balanced and varied diet, where they eat and drink healthy most of the time, to allow the occasional moment of hedonism.

It is ok to consume an indulgent treat occasionally as part of a healthy diet. 2021



Although consumers can turn to indulgent products for escapism, they can feel guilty post consumption if such occasions conflict with health goals – driving demand for guilt-free products.

Proportion of consumers who say that they have changed snacking from traditional products to high protein/low sugar alternatives in the last twelve months. 2021



Although consumers like to enjoy moments of indulgence, they can be conscious that such occasions conflict with wider health goals, such as looking to lose weight. This is driving demand for products that are deemed guilt-free, while snacking habits continue to evolve, with people seeking out products that they deem to offer taste and nutrition at the same time.



59%

of global consumers say that they regularly enjoy global treats.





3. Conscious Indulgence

Switching between compromised and uncompromised indulgence

Taste the Victory | Live in the Moment | Balance is Key | Think Before You Eat

Ideally, consumers want snacks to combine taste and health benefits simultaneously, so that products can be deemed to be guilt-free and conveniently nutritious.

What do you consider a snack to be? 2021 Global – Top five answers



Irrespective of concerns about health and the desire to maximize nutritional intake, consumers will be reluctant to compromise on moments of indulgence, especially at a time when it is common to turn to snacks and treats for moments of escapism from daily pressures. The evolution of snacking combines with continued meal skipping and substituting, with the concept of what constitutes a meal and a snack becoming increasingly blurred.

60% of global consumers who skip meals say that they regularly substitute such occasions with a snack (2021)

Proportion of consumers who say that on average, they miss the following meal at least three times a week. 2021 Global



Consumers are prone to skipping main meals, with a lack of time or hunger often being cited as the main reason for this. At the same time, there is the recognition that irregular mealtime patterns can contribute to health problems. As a result of this, there will be more emphasis on snacks offering nutritional value to compensate for such skipped occasions.





3. Conscious Indulgence

Switching between compromised and uncompromised indulgence

Taste the Victory | Live in the Moment | Balance is Key | Think Before You Eat

In times of uncertainty, demand for products that push the boundaries of hedonism will appeal, as consumers seek out moments of escapism from daily pressures.



Mountain Dew



McVitie's



Skittles



Bulk





Good & Honest

M&Ms

Better-for-you snacks will grow in appeal, as traditional snacking habits evolve, and consumers seek out products that they deem to be guilt-free and conveniently nutritious.





Dare to Change

Experimental consumers want new and unusual flavors that challenge their sensory perceptions, whilst also wanting authenticity and reassurance that maximum care and attention has gone into product formulation

4. Dare to Change

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The desire for experimentation, quality, and authenticity

Next Gen Taste | Evolving Flavors | Trust in Stories | More from Premium

Consumers deem themselves to be experimental and adventurous and want new and exotic flavors that they feel challenge their sensory perceptions and offer a genuine experience.

Proportion of consumers who say that they like food and drink products with new and unusual/exotic flavors. 2020



Europe

Taste and enjoyment remain the main motivations for sampling products, and consumers want new and unusual flavors across food and drink categories which challenge their sensory perceptions and offer a heightened moment of indulgence.

Self-identity is important to consumers who want products that they feel reflect their attitude and outlook on life and enable them to project their good taste and sophistication to others.

I find experimental and exotic flavors make a product more exclusive. 2020 Consumers who like new and unusual flavors

Global: 46%	
Africa/ME: 63%	
Asia-Pacific: 55%	
Europe: 36%	
North America: 37%	
South America: 52%	

Consumers want to project what they deem to be their good taste and sophistication on to others, and new and unusual flavors are deemed an ideal way to achieve this – especially if there is a story and heritage behind the flavors/food/drink being sampled.



4. Dare to Change

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The desire for experimentation, quality, and authenticity

Next Gen Taste | Evolving Flavors | Trust in Stories | More from Premium

The desire for experimentation is linked to globalization – with consumers wanting new and unusual flavors from around the world and specific regions.

Why do you like new and unusual/exotic flavors? 2021 Global - Consumers who like new and unusual/exotic flavors

I like to try new flavors from around the world I deem myself adventurous and like to try new flavors I like to try new flavors from specific regions from countries around the world I like trying flavors that I haven't tried before

I like to be experimental when cooking

Brands must look to combine global flavors with story-based marketing to offer an extra level of authenticity around new and exotic flavors. Attributes such as specific cooking and serving suggestions will also appeal to experimental consumers.

The desire for experimentation means that a significant proportion of consumers like unusual textures – however, it is crucial that novel textures are not deemed too disruptive.

Proportion of consumers who say that they like new and unusual textures. 2020



The desire for maximum experimentation also means that textures that challenge sensory perceptions. However, it is crucial that brands are not deemed to radical as consumers associate certain products and tastes with specific textures.





80%

of global consumers who like new and exotic flavors like Hot and Spicy Flavors. 0

The desire for experimentation, quality, and authenticity

Next Gen Taste | Evolving Flavors | Trust in Stories | More from Premium

Authenticity is important to consumers, who want to know the story behind the products that they purchase as a form of reassurance that maximum care and attention has gone into formulation.

Consumers want reassurance that maximum care and attention has gone into the formulation of products, something which influences perceptions of value. This is driving demand for story-based marketing, with consumers wanting to know the origin behind the products they purchase for transparency and authenticity purposes.

Proportion of consumers who now say they are more attentive to the country of origin of products. 2021



Demanding consumers are willing to trade-up for products that offer maximum quality and want brands to push the boundaries of premium and challenge traditional associations with product categories.

What product features do you pay extra for? 2021 If the product... **Global – Top five answers**



The desire for genuine experiences mean that consumers are willing to trade-up on products that they feel offer this. Ultimately, consumers want products that they feel offer taste sensation, whilst containing only real and authentic ingredients that are not detrimental to their health and wider environment. This further highlights the demand for products deemed guiltfree and conveniently nutritious amongst people.





The desire for experimentation, quality, and authenticity Next Gen Taste | Evolving Flavors | Trust in Stories | More from Premium



Pringles





Now & Later

Experimental flavors are of high appeal to consumers who want their sensory perceptions challenged. However, it is crucial that such flavors are deemed more than a novelty and instead add to the overall experience.

Herr Foods





Canyon

Rubicone

The demand for premium experiences – even when purchasing everyday offerings – means that authenticity is crucial, with consumers wanting to know the story behind the product they have purchased.



Everyday Starts Now



Consumers are adopting a long-term approach to health maintenance, adopting a back-to-basic approach to nutrition and wanting simplified information on how to lead a healthier lifestyle

5. Everyday Starts Now

The need for a simplistic and educated lifestyle

Transparent Thinking | Living for Tomorrow | Education is the Solution | Simplified Lifestyle

A strong focus on maximizing wellbeing means that it is crucial that nutritional information is deemed simple and transparent, so that consumers feel in control of their nutritional intake.



Consumers can sometimes feel that brands can make nutritional labeling deliberately confusing in order to hide certain ingredients in products, such as sugar. Given the worry that such behavior main undermine efforts to lead a healthier lifestyle, consumers want nutritional information to be as simplified as possible. Consumers are looking to stay fit and active until as late in life and as such, are adopting a long-term approach to health maintenance in order to minimize vulnerability to illness.

Proportion of consumers who say that they are taking a long-term approach to health. 2021



Consumers want to break stereotypes that exist around ageing and stay fit and active until as late in life as possible. At the same time, they recognize that current diets and lifestyles increase the risk of health problems later in life. As a result of this, they are adopting a long-term approach to health maintenance. This means that better-for-you products must be deemed compromise-free from a taste, cost, and convenience perspective to be easily incorporated into daily diets.



5. Everyday Starts Now

The need for a simplistic and educated lifestyle

Transparent Thinking | Living for Tomorrow | Education is the Solution | Simplified Lifestyle

COVID-19 means that there is a renewed emphasis on health maintenance, with consumers actively wanting to avoid ingredients deemed detrimental to health.

Why have you become more attentive to ingredient listings? 2021 Global – Top five answers – consumers who have been more attentive



Increased health concerns means that there is more focus on avoiding ingredients that are deemed detrimental to health – with this a greater priority over maximizing intake of functional ingredients.

Nutri-score/traffic light systems are influential on purchasing habits, and brands should strive for a process of continuous improvement from a labeling display perspective.

Proportion of consumers who say the following. 2021 traffic light/nutri-score systems...



Irrespective of whether people are satisfied with the standard of nutritional labeling, brands should push for continuous innovation from a transparency and simplicity process – to show that they are being proactive in trying to help consumers achieve health goals.

min. to -1	Dark green
	Louis Broch
0 to 2	Light green
3 to 10	Light orange
11 to 18	Medlum orang
19 to max.	Dark orange
	3 to 10 11 to 18



Nutrition Facts

serving per container 1/4 cup (40g) Serving size

mount per serving **Galories**

Fat 0g

aturated Fat 0g Fat

0a

66%

of global consumers say that they have become more attentive to the ingredient listings on food and drink products over the last twelve months.

5. Everyday Starts Now

The need for a simplistic and educated lifestyle

Transparent Thinking | Living for Tomorrow | Education is the Solution | Simplified Lifestyle

Proactive consumers are taking a prevention-over-cure approach to wellbeing and as a result of this, are self-educating about ingredients and healthy living.

Proportion of consumers who say that they research about how to lead a healthier lifestyle.2021



Consumers are actively researching about how to lead a healthier lifestyle, and ingredients that can help facilitate this, as they adopt a long-term approach to health. This means information provided by brands must be simple to understand, and that brands guide consumers when researching to minimize the risk of them misdiagnosing themselves with health issues. Consumers are adopting a back-to-basics approach to nutrition, turning to everyday food that they know and trust, and deem natural and nutritious, to maximize their wellbeing.



Proportion of consumers who are looking to

increase their intake of fruit. 2021

Europe

Consumers are adopting a back-to-basic approach to nutrition, turning to everyday food and drink products that they know and trust, deem natural and nutritious and crucially, tasty and affordable. This is resulting in people making greater efforts to maximize their intake of fruit and vegetables, as well as cook from scratch more with fresh food.





5. Everyday Starts Now

The need for a simplistic and educated lifestyle

Transparent Thinking | Living for Tomorrow | Education is the Solution | Simplified Lifestyle

The desire to lead a healthier lifestyle is something that will drive demand for better-for-you options, even in product categories that are inherently associated with indulgence.



Vizzy



Aice

Mojo

Consumers will strive for maximum transparency and control over their nutritional intake, resulting in them seeking out products that align with a back-to-basics approach to nutrition.





Your UnbelievaBowl

Arnold



Technovate Me



Consumers believe that technological innovations will offer new opportunities within the health and wellness market, especially from a customization and personalization perspective

6. Technovate Me

Technology in the new digital age

The Digital Age | Print My Food | Personalize Me | Food at My Fingertips

High levels of digital dependency means that consumer see online platforms as a solution to facilitating health goals and helping people lead a healthier lifestyle.

Proportion of consumers who use apps to monitor their nutritional intake. 2021



Digital dependency means that consumers are already prone to using apps to try and monitor their health. This will create demand over the next couple of years for online portals which allow consumers to monitor their health in real-time and offer specific solutions for individual health concerns and goals. Continuous technological advancements means that consumers want opportunities for customization within the food and drink marketing, such as made-to-order products or 3D food concepts.

Proportion of consumers who say that they are interested in food and drink products that are customized to meet individual nutritional needs. 2020



Customization is something that is seen to offer new opportunities across the food, drink, and supplement markets. This will drive demand for madeto-order products such as 3D-printed food and products where the taste and nutritional content of offerings can be pre-determined and then delivered. Consumers will expect to see such innovations in a matter of years.



Technology in the new digital age

The Digital Age | Print My Food | Personalize Me | Food at My Fingertips



Facebook and the introduction of the Metaverse system is described as a virtual world that will revolutionize the way that consumers interact, something that will create new opportunities for food, drink, and supplement brands.



The explosion of the E-gaming market and the opportunities that exist around ingredients that maximize stamina, performance, concentration, and energy levels, is another example of the blurring and crossover of the real and digital world that is yet to be fully targeted by brands.



6. Technovate Me



44%

of global consumers say that they are trusting of personal information being stored online by companies.
6. Technovate Me

Technology in the new digital age

The Digital Age | Print My Food | Personalize Me | Food at My Fingertips

The desire for maximum efficacy means that health and wellness products can sometimes be seen as too generic from a positioning perspective, driving demand for more personalized options.

Proportion of consumers who say that they find the concept of nutrition genetic testing appealing. 2020



Consumers can sometimes feel that health and wellness products on the market are not suited to their specific needs. This will create opportunities for innovation around personalization in the market, such as products designed for specific health issues based on the genetic testing of people's DNA. Real-time information is of high importance to consumers and provides an opportunity for the next stage of innovation in health and wellness based on how information is communicated and when.

Consumers live in a world where they have constant access to real-time information and will expect this to feature more prominently in the food, drink, and supplement market over the next few years. For instance, consumers will want to be able to monitor their nutritional levels in realtime and be provided instant information on what products they need to eat/drink for an immediate health boost.

We would now like you to think of the concept of chip-enabled skin patches to monitor your nutrition levels. These chips provide real-time information on when your body needs to increase its intake of certain nutrients. Proportion of consumers who say this sounds appealing. 2020





6. Technovate Me

Technology in the new digital age

The Digital Age | Print My Food | Personalize Me | Food at My Fingertips

Brands are looking to push the boundaries of efficacy from a health perspective, through the launch of customized products designed to meet the specific needs of the consumer.



GeneMe





23andME



USN



Neubria

The E-gaming market is one example of brands identifying opportunities to target consumers with solutions to health issues that may not have existed a decade ago.



Plant for the Planet



Consumers are modifying their diets to lead a healthier and more sustainable lifestyle, driving demand for brands and products that are deemed to be green and clean

C -

7. Plant for the Planet

Dietary habits are being modified to minimize the impact on the planet

Unearthed Herbs | Plant Fortification | Sustainability Driven | Clean Alternatives

Consumers are taking a high level of interest in ingredients associated with the past and ancient times because of the association with purity and a variety of health benefits.

Proportion of consumers who associate ancient grains with boosting their immune health. 2021



Interest is growing in herbs and ingredients associated with historic times, especially as consumers take a greater interest in alternative forms of health and wellness in general. This is driving demand for ingredients such as ancient grains, which are associated with being raw and pure and having a positive impact on a variety of health areas. Although consumers associate plant-based diets with a variety of benefits, they can be conscious about missing out on nutrients as a result of abstaining from animal produce – creating opportunities for fortification.

The flexitarian trend continues to grow across the globe, with more people looking to moderate/abstain from animal produce for health, sustainability, and ethical purposes. At the same time, they can be conscious that they are missing out on vital nutrients by doing so. This is something that creates the opportunity for fortification within the plant-based meat and dairy markets.

Proportion of flexitarians who find the concept of fortified plant meat appealing. 2021





7. Plant for the Planet

Dietary habits are being modified to minimize the impact on the planet

Unearthed Herbs | Plant Fortification | Sustainability Driven | Clean Alternatives

A proactive approach to protecting the planet is resulting in consumers making changes to their diets to lead a more sustainable lifestyle – and seeking out brands that reflect their attitudes and values.

Proportion of consumers who have made changes to their diets in the last two years to lead a more sustainable lifestyle. 2021



Consumers recognize that small changes to their diets and lifestyles can go a significant way to helping protect the planet. As a result of this, they are making changes to their eating and drinking habits in order to behave in a more sustainable manner. These consumers will want brands that match their attitudes and outlook on life and that are taking a proactive approach to protecting the planet. The popularity of plant protein is something that will continue to gain momentum in 2022 – however, it is important to recognize that this will not necessarily occur at the expense of whey protein.

Plant-based ingredients are also popular in the sports nutrition market, something which can be linked to the perceived health and sustainability benefits. However, it is important not to over-estimate the difference in appeal between plant-based and whey-based protein sources.

Proportion of consumers who say that they find the following types of protein sources appealing. 2021

Plant protein



Whey protein



29% of global consumers plan to increase their intake of plant-based food because of COVID-19.



C -

7. Plant for the Planet

Dietary habits are being modified to minimize the impact on the planet

Unearthed Herbs | Plant Fortification | Sustainability Driven | Clean Alternatives

Consumers want ingredients that they know and trust, deem real and authentic, and nutritious – transparency over formulation is more important than ever.

Proportion of consumers who say that they are concerned about ingredients that sound chemical. 2021



Consumers want products that contain only a handful of ingredients that they know and trust, driving demand for ingredients that they know and trust. Crucially, they want to avoid ingredients deemed chemical that they associate with being detrimental to their health and the wider environment. Concerns about the use of chemicals in products and the health and environmental implications of this, is driving demand for products that are deemed to be green and clean.

Over the last eighteen months, people have been more attentive to the ingredients used in products for health and safety purposes. This is driving demand for ingredients that are deemed real and authentic and nutritious, with consumers wanting streamlined ingredient lists and a variety of free-from claims on packaging. They also want to avoid chemicals deemed harmful to themselves and the environment.

What type of claims do you like to see on packaging? 2021 Global – Top five answers







7. Plant for the Planet

Dietary habits are being modified to minimize the impact on the planet **Unearthed Herbs | Plant Fortification | Sustainability Driven | Clean Alternatives**

The increased popularity of plant-based alternatives is something that will result in the growth of new categories and new health claims, as people actively look to reduce their intake of animal produce without the compromise.





VBites

Good Catch





Plant Menu



THIS





Bare

Plant Snacks

The desire for green and clean products will drive demand for products that contain only a handful of ingredients, as consumers seek out transparency over formulation.



Prevention Over Cure



A focus on disease management means that consumers are taking a proactive and preventive approach to health and looking to minimize vulnerability to disease and illness

8. Prevention Over Cure

Health goals are no longer aspirational, they are integral

Proactive Wins | My Microbiome | Beauty Starts Within | Shield My World

Health goals are shifting with a greater focus on disease management, meaning that consumers are adopting a proactive and preventative approach to wellbeing.

Proportion of consumers who say they have become more conscious about the importance of trying to prevent health problems occurring by leading a healthy lifestyle as a result of COVID-19. 2021



Over the last eighteen months, consumers have re-evaluated their health as they have questioned their vulnerability to disease and illness. This means that health goals have shifted with a greater focus on disease management and prevention over cure. This is driving demand for functional products that promote a variety of health claims. Across the globe, the prevalence of digestive health problems continues to grow whilst at the same time, more becomes known about the long-term impact that this can have on overall health.

Proportion of consumers who say that they recognize the link between digestive health and overall health.



Consumers recognize that all aspects of health are interlinked and impact on each other, especially immune and digestive health. As more becomes known about the gut microbiome and the link between beneficial bacteria and wellness, people will actively seek out functional products and ingredients that address digestive health.



8. Prevention Over Cure

Health goals are no longer aspirational, they are integral

Proactive Wins | My Microbiome | Beauty Starts Within | Shield My World

Attitudes towards skin health continue to evolve, with people adopting the notion of beauty from within and recognizing the link between skin health and overall wellbeing.

I am interested in products that address skin health even if not suffering any specific symptoms. 2021 I am interested in more information about improving skin health 2021

Global: 59%		Global: 59%			
Asia-Pacific: 61%	Europe: 58%	Asia-Pacific: 59%	Europe: 60%		
North America: 57%	South America: 70%	North America: 56%	South America: 56%		

A switch from anti-ageing to healthy ageing means that consumers are becoming more attentive to the link between skin health and overall health. This means that beauty and grooming routines are no longer governed by the desire to maximize physical appearance but instead, the concept of beauty from within and the view that good skin health can boost other areas of physical and emotional wellbeing. As people question aspects of live that they previously took for granted, greater emphasis is being placed on safety with a focus on minimizing the risk of exposure to germs, viruses, and bacteria.

Proportion of consumers who are concerned about virus, germs and bacteria...2021

	Global	Asia- Pacific	Europe	North America	South America
On food and drink	72%	70%	72%	76%	73%
In the air	74%	73%	73%	76%	76%
In water supplies	68%	66%	69%	71%	66%
On surfaces	72%	70%	71%	77%	67%

People are becoming more concerned about exposure to germs, bacteria, and viruses, especially due to reduced levels of confidence over their immune health. As a result of this, consumers are actively seeking out products that boost their immune system, whilst becoming more risk adverse and changing their lifestyles to minimize exposure to external sources that could make them ill.





64% of global consumers now say that they are more conscious about their immune health.

8. Prevention Over Cure

Health goals are no longer aspirational, they are integral

Proactive Wins | My Microbiome | Beauty Starts Within | Shield My World

A focus on prevention over cure means that consumers are interested in products that help address specific health issues, even if they are not suffering from symptoms.

Proportion of consumers who say that they are interested in products that address the following areas of health, even if they are not suffering from specific symptoms. 2020/2021

	Global	Asia- Pacific	Europe	North America	South America
Immune health	67%	67%	67%	68%	63%
Digestive health	66%	66%	65%	70%	70%
Cognitive health	66%	65%	67%	70%	58%
Heart health	69%	70%	69%	68%	69%
Joint and bone health	62%	63%	61%	65%	61%

Demand for functional products will be high, even if consumers are feeling confident with that area of wellbeing.

The desire to shield from germs, bacteria, and viruses, is something that will drive demand for products that contain ingredients associated with boosting the immune system.

Top ten ingredients associated with boosting the immune system. 2021 Global



A focus on minimizing vulnerability to disease and illness is something that will drive demand for products that help maximize the immune system, especially as this is an area of wellbeing that people have become less conscious about over the previous two years.



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8. Prevention Over Cure

Health goals are no longer aspirational, they are integral

Proactive Wins | My Microbiome | Beauty Starts Within | Shield My World

Functional products positioned around active ingredients and health claims will appeal, especially as proactive consumers research about different ingredients that maximize wellbeing.

Reduced confidence over the ability to deal with disease and illness will drive demand for products that are promoted around boosting the immune system, especially as the threat of the pandemic continues to linger.





Remedy



Sainsbury's





Onken



Peace of Mind

Risk adverse consumers are looking to reduce feelings of stress and uncertainty, with an increased focus on safety and a re-evaluation of what is important in life

9. Peace of Mind

Risk aversion continues as people strive for familiarity

Safety First | Tried & Tested | Self-Aware | Scratch Cooking

Consumers are questioning aspects of life that they previously took for granted. High levels of continued uncertainty means that trust and safety will have a greater influence on attitudes and behaviors.

Proportion of consumers who say that they are concerned about the following issues. 2021 Global – Top five answers



Increased consciousness about a variety of health, financial and emotive-based issues will have a significant influence on purchasing habits across the food, drink, and supplement industry.

Risk aversion and concerns that society is changing at too fast a rate means that consumers are placing greater emphasis on seeking out products that they know and trust.

Risk aversion is resulting in consumers placing greater emphasis on safety. As a result of this, consumers are making greater efforts to seek out products that they know and trust. Brands and retailers need to respond to this by putting heritage and country of origin at the forefront of marketing to help offer familiarity and safety assurance.

Proportion of consumers who are now making greater efforts to seek out trusted brands. 2021





9. Peace of Mind

Risk aversion continues as people strive for familiarity

Safety First | Tried & Tested | Self-Aware | Scratch Cooking

People are being more attentive to the origin of products, wanting reassurance that products are in optimal condition and have been kept safe along the supply chain.

Proportion of consumers who want more safety assurances when it comes to the handling and manufacturing of products. 2021



In times of uncertainty, consumers can demonstrate ethnocentric attitudes to products from certain parts of the world. They also want more reassurance around safety, and the assurance that the products they purchase are in optimal condition and have not been exposed to any harmful external sources. This is driving demand for shortened supply chains and packaging innovations that offer maximum safety. Increased consciousness about a variety of issues means that the role of packaging will is being re-evaluated, with a greater emphasis on product safety.

Historically, consumers have not always had the most favorable perceptions towards packaging, especially plastic. However, increased emphasis on product safety is resulting in consumers re-evaluating the role of packaging, with greater emphasis being placed on ensuring that products arrive in optimal condition and have not been contaminated along the supply chain.

Proportion of consumers who say that they have become more concerned about product contamination over the last two years.





58%

of global consumers say that they are now being more attentive to whether products are produced locally or not.

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Risk aversion continues as people strive for familiarity

Safety First | Tried & Tested | Self-Aware | Scratch Cooking

High levels of uncertainty over the last eighteen months and the impact it has had on mental wellbeing, means that consumers are stepping back from daily pressures and re-prioritizing what is important to them.

The severe impact on the emotional wellbeing of consumers over the last eighteen months is resulting in many consumers stepping back from the pressures of daily life and re-prioritizing what is important to them. This is resulting in consumers looking to maximize personal relationships with loved ones, especially as they increasingly see time as a precious commodity.

Proportion of consumers who are making greater efforts to sit down and eat together as a family. 2021



Greater attentiveness to ingredients and focus on naturalness and wholesomeness, means people are looking to cook from scratch more, recognizing the physical and emotive benefits of this.

Proportion of consumers who say that they are making greater efforts to cook from scratch. 2021



Risk aversion is also having a direct impact on cooking habits. Indeed, many consumers are making greater efforts to cook from scratch. This is being driven by health and safety concerns, with people turning to tried and trusted ingredients where they feel they have maximum control and awareness over the safety and nutritional value of products.





Risk aversion continues as people strive for familiarity

Safety First | Tried & Tested | Self-Aware | Scratch Cooking

Local produce that places a strong emphasis on provenance and origin will be of high appeal to consumers, with story-based marketing around formulation of importance.



Russell's British Store





Wicked Kitchen





Aqua Star

CJ CheilJedang Corp

An increased focus on scratch cooking will drive demand for meal kits and other types of solutions that enable consumers to prepare fresh and healthy food in an easy manner.

Oooby



Reality Resumes

A focus on returning to normality whilst dealing with high levels of uncertainty means that consumers will face a variety of stresses and concerns on a day-to-day basis

10. Reality Resumes

Adjusting to life in the "new normal"

New Age Earth | Reassessing Value | Focus on Convenience | Comfort Please

In a post-pandemic society, concerns about the environment will intensify, with brands and retailers expected to demonstrate sustainability initiatives along the whole of the supply chain.

As a result of COVID-19, consumers will place more emphasis on protecting the planet. This is because many consumers are questioning whether environmental issues were something that contributed to the devastation caused by the pandemic. As a result of this, they will expect brands to take a proactive approach to sustainability and demonstrate green initiatives along the whole of the supply chain.

Proportion of consumers who say that they have become more concerned about the environment as a result of COVID-19. 2021



As consumers adjust to what they deem to be the new normal, barriers to healthy living will continue to exist that the industry needs to help try and address.

Top five barriers to healthy living. 2021 Global



Irrespective of the high motivations being demonstrated towards improving levels of wellbeing, the reality is that as life returns to normal, barriers to doing so will continue to exist – even as the threat of coronavirus continues to linger. As a result, it is crucial that better-for-you products are deemed hassle-free to easily incorporate into modern lives.



Adjusting to life in the "new normal"

New Age Earth | Reassessing Value | Focus on Convenience | Comfort Please

In a tough economic environment where shopping habits become more considered, consumers will place greater emphasis on food and drink offering maximum value for money.

Proportion of consumers who say that they are looking to save money on their food and drink. 2021



Financial wellbeing is something that has been impacted by the pandemic, with many concerned about the state of the economy and their ability to deal with everyday living costs. As people look to save money on their shopping bills, they will engage in a form of hi/low consumerism, looking to save money on certain products in order to trade-up in other product categories. It will be more vital than ever before brands to elicit an emotional reaction with consumers to reduce levels of price sensitivity and encourage impulse buying.

Even in times of reduced economic uncertainty, consumers want to avoid compromise, especially by having to omit certain products from their shopping. If brands are to encourage trade-up, they need to elicit an emotional reaction amongst consumers through leveraging perceptions of value.

Actions most likely to be taken by global consumers when looking to save money on their shopping bills. 2021

Take advantage of promotional offerings (75%)

Stick to a budget

(74%)



Seek out better value for money (72%)

Make greater efforts to avoid food waste (59%

Ensure that products are fully used before being replaced (57%)



10. Reality Resumes

41%

of global consumers say that they regularly do not have as much time as they would like to spend in the kitchen.

Adjusting to life in the "new normal"

New Age Earth | Reassessing Value | Focus on Convenience | Comfort Please

Whether real or perceived, consumers will continue to feel time-scarce as they look to cram as many personal and professional obligations into the day, whilst not having enough time to relax.

10. Reality Resumes

Proportion of consumers who say that time-scarcity means that they often turn to convenience food. 2021



Consumers can often feel that the busy lives that they lead are something that can have a negative impact on health. In a post-pandemic society, these concerns around time-scarcity will intensify, driving demand for products that are deemed to be hassle-free and easy-to-consume, without compromising on other product attributes such as taste. Demand will also intensify for products that help aid relaxation and encourage consumers to switch off. A return to daily pressures combined with continued uncertainty around the pandemic, with drive demand for products that offer moments of comfort and escapism.

Proportion of consumers who say that they find nostalgic flavors appealing in the food market. 2020



Continued levels of uncertainty and daily stresses will continue to impact on the emotional wellbeing of people. This will drive demand for products that offer moments of comfort and escapism, especially nostalgic products that elicit an emotional reaction amongst people because they remind them of the past and simpler times.





Adjusting to life in the "new normal"

New Age Earth | Reassessing Value | Focus on Convenience | Comfort Please











Coca Cola

Irrespective of financial concerns, consumers will continue to trade-up on

products that they feel offer maximum value. It is crucial that brands clearly

promote attributes that align with evolving consumer need states.





Chupa Chups

General Mills

The busy lives of modern consumers means high levels of stress, time-scarcity, and feelings of uncertainty. As a result, they will seek out products that offer moments of comfort and escapism.





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