



# **New product trends you need to know and how they impact vinegar products**

**Presented by:**

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# Agenda

- **Who we are**
- **Four major trends driving consumer behavior in Europe**
  - What they mean, what consumers say
  - How vinegar products fit in
  - Product examples from Europe and US
- **Some thoughts for the future**



# Who we are

The insights behind your next big idea



## Consumers

We ask 30,000 people for their opinions each month.



## Markets

We track consumer spending in 3,000 markets across 34 countries.



## Innovation

We cover 33,000 new product launches from 62 countries each month.



## Trends

We track more than 70 consumer lifestyle trends and thousands of observations on a daily basis.





# Based on a True Story

Consumers have been romanced by the stories products are telling about their origin, ingredients or inspiration, but confusion arises when similar claims are being made by legitimately hand-crafted products as well as mass-produced food and drink.



## Consumers are increasingly curious

42%

of **UK** adults ages 16+ say, 'I would expect food produced by smaller companies to generally be more ethical'.

46%

of **Italian** consumers aged 16+ claim that milk packaging should have **more information about where the milk came from** (e.g. dairy farm/farmer).

31%

of **German** internet users aged 16+ **buy less prepared meals** as compared to a year ago because of the **lack of transparency in the ingredients** used in prepared meals.



**“Consumer confidence** is one of the pillars for the continued success of our brand. It is important to provide information as transparent as possible about our ingredients, the countries of origin and the processing. Only then consumers understand and trust our uncompromising renunciation of all food additives.”

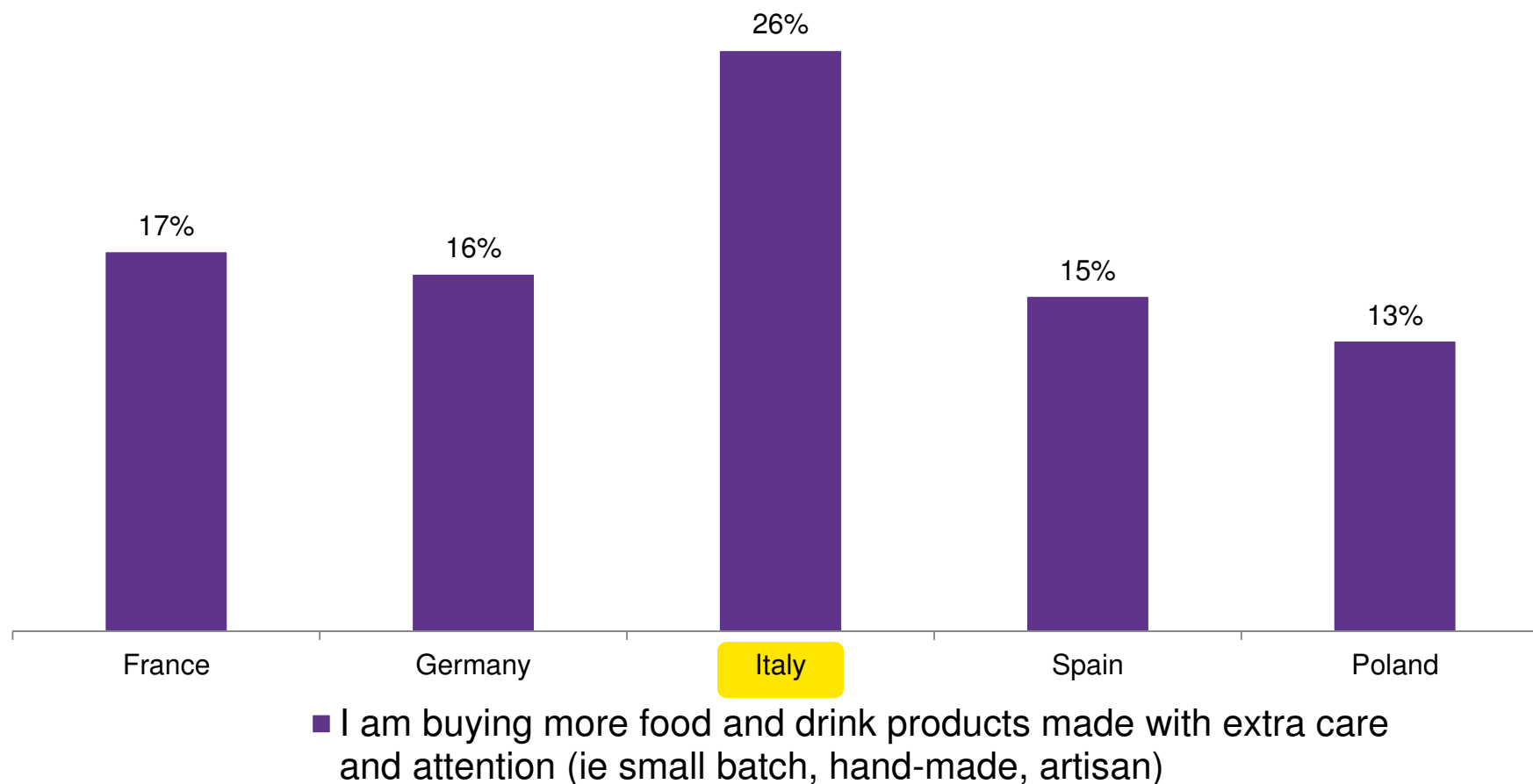
**Hinnerk Ehlers,  
Executive Board Member at  
FRoSTA AG,  
April 2015**





# Italians most likely of surveyed Europeans to trade up

Grocery shopping habits related to craft/artisan, select European countries, Q2 2015



Base: 1,000 internet users ages 16+ in each country  
Source: Lightspeed GMI/Mintel

## 'Craft' claims used by companies of all sizes

### Minor Figures Cold Brew Coffee & Organic Milk, UK

Front of pack 'craft blend' claim



### Horlicks Chocolate-flavored Malt Food Drink, South Africa

'Has been carefully crafted with milk, malted barely and wheat'





# Hand-crafted and artisanal values appear in vinegar products

“Crafted in the artisanal style”



Colavita Balsamic Vinegar of Modena PGI, Israel

“Made using ancient and traditional artisanal methods”



Silva Fine Herb Infusion Vinegar, USA

Artisanal, from France



Les Bastides de Manon Vinegar with Mango Pulp, France

# Tradition, provenance in products made with vinegar

**Made with small farm ingredients**



Beekman 1802 Farm Pantry Cider Vinegar Brisket Starter, USA

**Real food ingredients, craft cooking methods**



Kettle Brand Sea Salt & Vinegar Potato Chips, global

**Made with balsamic vinegar of Modena**



PepsiCo's Market Deli Balsamic Vinegar of Modena Flavoured Potato Chips, Belgium



# Consumers seek unique and meaningful stories

## FROM PURE FACTS



### Froh Natur

#### Premium Beer Ham, Germany

*'made from meat from animals whose welfare is taken in to consideration'*

## TO EMOTIONAL STORY



### Carroll's Hand Crafted

#### Slow Cooked Smoked Tullamore Ham, Ireland

*'Our grain-fed pigs live in a superior environment in Ireland, which we believe produces a higher quality and better tasting ham'*

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## What it means

# Trust

Consumers' faith in a company and product is becoming more of a necessity in the buying process.

# Craft

Shoppers continue to want to know more about a product, its maker and inspiration.

# Care

Honest communication about the thought that went into making, producing, packaging and selling a product can connect with consumers.

# Size

A “think small” mentality can help larger companies adapt to consumer values.



# Diet by DNA

Interest in natural and “getting back to basics,” has boosted ancient grains and superfoods, fostering a principle that age-old food and drink staples are better than today’s manufactured options. This interest in history could become more personal.

The Mintel logo is located in the bottom right corner of the slide. It consists of the word "MINTEL" in a bold, white, sans-serif font, enclosed within a yellow speech bubble shape. The background of the slide is dark with a pattern of colorful, semi-transparent circles in shades of blue, green, yellow, and pink, creating a bokeh effect.





**Many consumers recognize balancing act of achieving a healthy diet**

**39%**

of **Spanish** consumers aged 18+ are prepared to **change their lifestyles to be healthier.**


**30%**

of **German** internet users ages 16+ **trust diet brands to make their diet products nutritious.**

**32%**

of **UK** adults aged 16+ **prefer foods naturally high in nutrients** compared to foods with added health benefits (e.g. fortified foods).





**Interest in historical ingredients suggests that people could make efforts to unlock the keys to their personal physiology and design optimum diets by connecting with their own ancestry and/or genetic make-up.**

# History emerges as people embrace the Paleo diet

**PALEO (IN A) NUTSHELL**

EATING THE FOODS THAT OUR BODIES HAVE BEEN DESIGNED TO EAT FOR **100,000s OF YEARS**

FOODS WHICH ARE HUNTED + GATHERED IN THEIR NATURAL STATE

GRAINS / DAIRY / GM / PROCESSED FOODS

**FOODS TO EAT**

- MEAT + VEGETABLES + EGGS
- SEAFOOD + NUTS AND SEEDS
- HEALTHY FATS + FRUIT

**FOODS TO AVOID**

- GRAINS + REFINED SUGAR
- DAIRY + PROCESSED FOOD
- LEGUMES (INCLUDING PHASOLY AND SOY)
- PROCESSED VEGETABLE OILS

**WHY PALEO?**

- BURN BODY FAT & INCREASE METABOLISM
- CUT OUT JUNK & CLEAN UP YOUR DIET
- IMPROVED ENERGY & MORE EFFICIENT TRAINING
- REDUCE FOOD ALLERGIES & INTOLERANCES
- REDUCE INFLAMMATION
- BALANCE HORMONES

**PALEO IS MUCH LOWER IN CARBS THAN THE STANDARD DIET!**

CARBS COME MAINLY FROM VEG + FRUIT

**VEGETARIANS**

PALEO LIFESTYLE FOCUSES HEAVILY ON PLANT FOODS, LOTS OF HEALTHY FATS, AVOCADOS, COCONUTS, NUTS & SEEDS AND HEALTHY PROTEIN LIKE EGGS

★ ADJUST YOUR CARBOHYDRATE INTAKE ACCORDINGLY TO FUEL YOUR LIFESTYLE

**GO AGAINST THE GRAIN**

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Primal Chow Raisin & Rosemary Crackers, South Africa



Caveman Cookies 'made with ingredients that cavemen had access to,' UK



Inspirale Kale-Os 'is suitable for vegans and for paleo diets,' Spain



The Primal Kitchen Coconut & Macadamia Raw Paleo Bar, UK





## “Ancient grains” become more common

**Männl Ancient Einkorn  
Wheat Sticks with Chilli,  
Germany**



**Wolf Kamut Khorasan Spirelli  
Pasta, Austria**  
Made from 100% Khorasan  
wheat, an ancient grain variety



**Sasko Plus+ Smooth  
Ancient Grain Brown  
Bread, South Africa**



# Vinegar has a long, rich history



**DIY Red Wine Vinegar**  
**1.** Start with 8 ounces of "mother" of vinegar (see "Kitchen Alchemy," below) and anywhere from 8 ounces to one bottle of organic red wine. Pour both into a crock (check instructions on your particular mother!). Cover crock with cheesecloth.  
**2.** Add leftover wine periodically (it's fine to mix varieties) until the crock is three-quarters full, leaving a few inches at the top. About three bottles will fit in a 1-gallon crock.  
**3.** Check the vinegar weekly. It's ready to bottle when the liquid smells strongly of vinegar and a solid skin has formed on top. This takes five to six weeks.  
**4.** Ladle half of the vinegar from the crock, leaving the skin in place. The remaining vinegar is your new mother. Using a funnel, transfer the ladled vinegar into empty wine bottles. Cork and store in a cool, dark place. Bottled vinegar improves with age and lasts a few years.  
**5.** Continue adding wine to the crock until you've replaced about as much as you bottled. Subsequent batches take only two to three weeks.

**The New Delicious KITCHEN ALCHEMY**  
 Red wine is great to drink, and for those of us who love to cook, it's also a beneficial gift from the gods of the kitchen. I challenge you to find an ingredient that deepens the flavor of a braised beef dish or a deglazed sauce more than a decent cabernet. The problem is leftovers. You open a bottle to drink a couple of glasses or add a glug to the pan, and then what? I hate to waste anything in my kitchen. Fortunately, there's a fantastic way to put those leftover dribs and drabs to good use: Make vinegar. The process is simple: All you need is a 1-gallon earthenware crock and a "mother" of vinegar made of active bacteria that converts the alcohol in the organic wine (buy it online at [homebrewing.org](http://homebrewing.org)). And you'll only need to purchase one mother: Make sure she never dries out, and she'll live forever. —Erik Murnighan, President of New York City Campus, International Culinary Center

**Garden Guru**  
**A Fresh Resolve**  
 BY MARGARET ROACH

It's early enough in the year that you're probably still jotting lists of seeds or plants to try, designing refinements, making other intentions for the garden ahead. Here are 10 resolutions for 2016 that add up to greener overall behavior, some with cost savings, too.

**1 UPGRADE TO ORGANIC SEED** if available. It's a better match for your chemical-free garden, plus your purchases reward suppliers who farm cleaner.

**2 STOP BUYING BAGGED MULCH** and find a local source of an aged product for bulk delivery instead. Fewer plastic bags get trucked around, and you get a more soil-sustaining material than bark chips that tie up nutrients like nitrogen as they break down.

**3 TEST SOIL** as soon as it's workable instead of reflexively buying amendments, including fertilizer, presuming you need to "add something." Usually you don't.

**4 AVOID STORE-BOUGHT GARDEN REMEDIES**, even those labeled organic. Use vigilance instead. Promptly remove faded, floppy leaves or sick plants before they invite trouble. Inspect beds regularly for early signs of pests (eggs on leaf undersides or chewed bits). Intervene with hand-picking or a stiff hose spray—a few holes in your arugula don't warrant pesticide.

**5 CREATE MORE "EDGE,"** technically called ecotone—the midlayer, wildlife-supporting transition zone between two habitats. Hint: There's no ecotone where mown grass meets 40-foot tree.

**6 REASSESS YOUR LAWN.** Can a portion be converted to more diverse planting? Maybe a change in mowing frequency is all that's needed. Less turf mowed is less fuel burned, too.

**7 REALLY LEARN TO WEED**, once and for all. Do it early (with a hoe to fell emerging seedlings) and often. Waiting until weeds are out of control only increases the urge to resort to sprays.

**8, 9, 10 REMEMBER THE BASICS.** Skip the lawn chemicals. Make every drop of water count (which doesn't include watering turf). Compost with commitment.

*Margaret Roach creates the [awaytogarden.com](http://awaytogarden.com) website.*

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## DIY vinegar, too

- According to Organic Life magazine, Babylonians made the first vinegar from date and raisin wine, 6,000 years ago.
- It also offers instructions on how to make your own, using undrunk wine and a vinegar "mother," similar to a sourdough starter.

## Vinegar in beverages harkens back to an earlier time



Up Mountain Switchel Lemon American Heritage Beverage, USA



Bragg Organic Apple Cider Vinegar & Honey All Natural Drink, USA



## Vinegar's traditional use in cleaning becoming popular again



### UK consumers embrace cleaning vinegar

- Some 21% of adults sometimes use baking soda, vinegar or lemon juice to clean surfaces in the home, so a substantial minority of people already have confidence in kitchen-cupboard ingredients as an effective way of cleaning particular surfaces. Brands targeting those most concerned about using chemicals could highlight the benefits of using household ingredients more prominently.

## Companies answer consumers' desire for “natural” cleaners



Carrefour Alcohol Vinegar,  
France



Henkel Pril Ultra  
Concentrated Liquid  
Detergent with Lavender  
and White Vinegar, Austria



Henkel Pur Power  
Lavender & White Vinegar  
Washing Up Liquid,  
Slovakia



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## What it means

# Real

Consumers' desire to get back to tradition has potential to extend beyond superfoods and ancient grains, to any ingredient that has a long, proven history.

# Me

Customization is an expectation across so many parts of people's lives – it's only natural to extend this to developing a personal list of "good" and "bad" foods, or "good" and "bad" home care and personal care.

# Native

History books and documentaries will provide inspiration for these "back to my past" eating and living plans.



# From the Inside-Out

As the adage goes with beauty, “It’s what’s on the inside that counts,” and more consumers are recognizing that their diets can connect with the way they look and feel, creating a market for products enhanced with everything from collagen to probiotics.



## Nutrition skepticism is growing

42%

of **French** consumers aged 16+ are worried about the **negative side effects of taking too many vitamins, minerals and supplements.**

47%

of **Spanish** internet users aged 16+ agree that people use vitamins/minerals/supplements **to fix a bad diet.**

58%

of **German** internet users ages 16+ are **wary of the ingredients that go into diet food products** to make them low calorie (e.g. sweeteners, additives etc.).



## Looking for natural health and beauty boosters

66%

of **British** women aged 16+ believe that diet is an important factor in determining the appearance of their facial skin.

62%

of **Italian** internet users aged 16+ agree that it is **better to get vitamins from a healthy diet** than to rely on vitamins/minerals/supplements.

82%

of **Polish** internet users ages 16+ who eat yogurt/drink yogurt drinks think that yogurt and yogurt drinks are a **good way to support digestive health**.

## Two claims help define “from within” products

### Detox



**Aloe Water All Natural Aloe Vera Juice + Pineapple with Vitamin C & E, South Africa**  
The natural detox drink is made from pure aloe vera juice and is said to aid digestion, improve blood circulation and detoxify the body.

### Defense



**Pack'd Defence Smoothie Kit, UK**  
It is “packed with vitamin C, A and copper, which contribute to the normal functioning of the immune system and high in manganese, which contributes to the protection of cells from oxidative stress.”





## Detox and defense claims appear in vinegar products

**Detoxes internally,  
soothes skin, makes  
hair shiny**



N2H Apple Cider Vinegar,  
India

**Vinegar in facial care  
to defend against  
the elements**



Kensington Apothecary  
Saké Skin Detox Tonic,  
USA

**Powdered detox  
solution with apple  
vinegar**



iWellness Detox Vinegar  
Detox Vinegar Sachet,  
Hong Kong



# Beauty products use food as ingredients

## Aubrey Chia Salt Spray, Netherlands

Includes organic chia seed oil, organic quinoa proteins and an antioxidant tea blend



## NIP+FAB Soften Kale Fix Moisturiser, UK

Packed with superfood ingredients kale and watercress to reinvigorate skin



## Ella Baché Tomato Cleansing Oil, France

Based on organic tomato, grape seed and rice bran oils



## Vinegar in personal care makes a connection to food as well

**Cough syrup with  
apple cider vinegar,  
honey, cayenne**



Maty's Organic Cough Syrup, USA

**Formula from 1912  
to restore and repair  
hair, with vinegar**



Shea Moisture Jamaican Black Castor Oil Strengthen & Restore Shampoo, UK

**Supplement to aid  
digestion**



New Nordic Apple Cider High Strength Food Supplement, UK

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## What it means

# 360°

Consumers are looking for holistic approaches to health and wellness, creating opportunities for products that start working from the inside out.

# Gut

While not yet common – or potentially polite – conversation, the importance of digestive health to overall health and wellness is becoming more accepted.

# Looks

Beautification through one's diet has been a common practice in Asia, but is just emerging in the West.

# Own

Consumers are interested in learning the specific roles of foods as well as vitamins and minerals to help them create their own personal plans.



# Good Enough to Tweet

The rise of food-centric media has sparked a new interest in cooking, not only for the sake of nourishment, but for the purposes of sharing one's creations online via social media.





## Food is a common topic on social media

### Food&Drink

is **#2 Pinterest's most browsed category** by active and daily users ('pinner') after DIY & Crafts.

**39%**

of **UK** internet users ages 16+ who have eaten in a restaurant or ordered takeaway/home delivery from November 2014-February 2015 and who are social media users **have interacted with and/or posted about a food or drink venue on social media.**

**236k**

people are **following on Twitter** UK's competitive cooking reality show '**MasterChef**'.



## Home cooking grows, giving people something to share

51%

of **Polish** internet users aged 16+ are **keen to try more exciting recipes.**

39%

of **German** internet users ages 16+ say they **are very adventurous in their cooking habits.**

29%

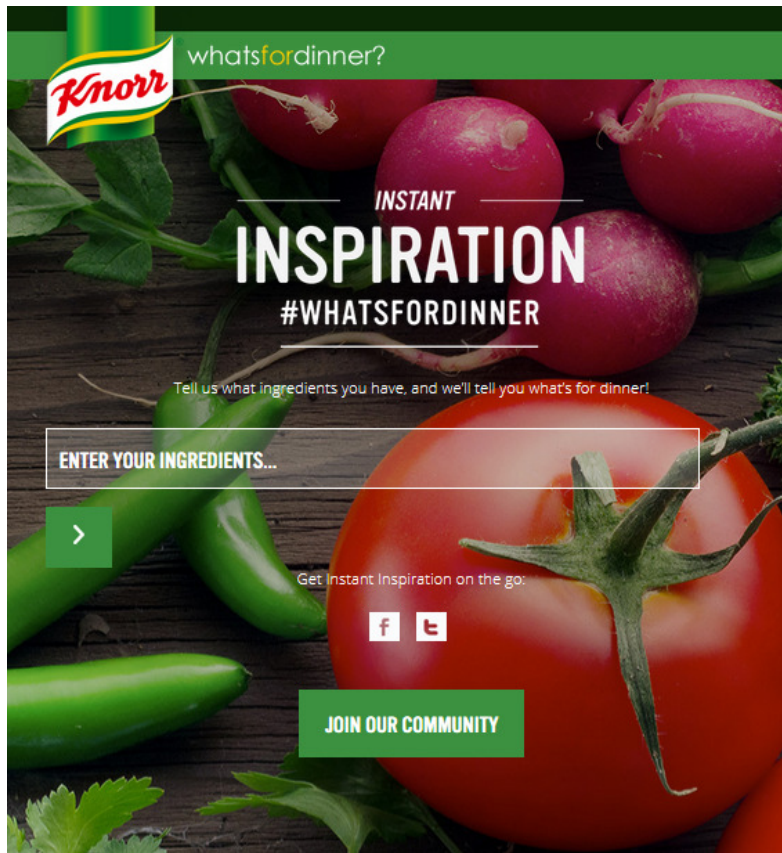
of **UK** internet users ages 16+ **are cooking from scratch at home more in 2014 than 2013.**



# Looking for recommendations

## Knorr 'What's for Dinner?', South Africa

The application quizzes users about preferences and ingredients and then suggests recipes, using Knorr products



Going forward, consumers likely will embrace easier ways to search for recipes or tips





# The power of hashtags



**#foodporn** is one of the most popular hashtags in social media, used by foodies to **tag images of enticing meals.**

The practice of **posting and watching 'glamourised' food pictures** in social media is meanwhile **so powerful that it appears to be related to obesity**, the new research suggests.

## Serve it like a chef

The increase in the number of TV cooking shows and other food media in many countries is elevating the fame of professional chefs, creating a market for products that cater to the aspiring home chefs.

**Home Chef Chloride for Spherification, Spain**  
For use in molecular gastronomy



**Sugat Coloured Sugar Paste, Israel**  
Can be used to sculpt, cover and create edible decorations





# Restaurant values at home, to appeal to the visual “foodie”

## Upscaling of pasta sauces

- R&B Foods has launched the super-premium Bertolli Riserva range in the US with a blend of luxury ingredients designed to “elevate the taste of any meal.”
- A growing army of foodies in the US, particularly millennials, is encouraging pasta sauce brands to innovate with a wider variety of gourmet Italian ingredients .
- This launch is timely and well positioned, given that 23% of US sauce users say they prefer premium, gourmet, artisanal flavours. Interest peaks among higher earners.



Bertolli Balsamic Vinegar with Caramelized Onions Sauce

## Unique varieties can also appeal to the more-visual consumer

The increased appreciation for sour, tart tastes is also part of the wider drive for flavour variety to avoid meal boredom.

Tapping in to emerging flavour trends may help boost uptake by younger consumers.

Using unusual vinegar sources may also boost vinegar's uptake, particularly as a cooking ingredient or in marinades. For instance coconut is a "hot" food trend and a small number of coconut vinegars are now appearing in Asian and European markets.



Eden Selected  
Ume Plum  
Vinegar (US)



Williams-Sonoma  
D'Anjou Pear  
Flavored Balsamic  
Vinegar (US)



Dunderave Olive  
Company  
Chocolate  
Balsamic Vinegar  
(Canada)



Coconut Secret  
Raw Coconut  
Vinegar  
(Netherlands)



SM Mang Jose's  
Hot & Spicy  
Coconut Vinegar  
(Phillipines)



## The same is true with products with vinegar as a component



Heinz Balsamic Vinegar  
Tomato Ketchup, USA



Skillet Original Uncured  
Bacon Spread, USA, made  
with bacon, onion,  
balsamic vinegar, and  
brown sugar



Miss Algae Perles de  
Saveurs Flavour Pearls  
with Vinegar & Shallots,  
Germany

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## What it means

# Share

Consumers are more active on social media and food is often the central element of posts, driving creativity at restaurants and at home that brands can tap into or drive.

# Chef

More people are honing their personal skills, with many trying to become specialists at grilling, baking or other niches. Communication and contests can encourage these pursuits.

# #

Monitor hashtags, Tweets and other trending topics online to find the next flavor, preparation or cuisine of interest.



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## A few final thoughts regarding vinegar products

### Less sweet

Consumers are looking for more sour, tart, astringent flavors, which puts vinegar in just the right place at the right time.

### Ferment

Fermentation (e.g. kimchi, kombucha) continues to grow in popularity, providing opportunity to talk about vinegar's place in this trend.

### Experiment

Most food trends center around health & wellness, but flavor and experience are important too. Don't forget those consumers who simply want to try new things.

### Heritage

The popularity of understanding where things come from cannot be understated. Find more and better ways to tell vinegar's story.

# Thank you!

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