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# Clean label: what matters to consumers?

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Experts in what consumers want and why



# Before we get started...



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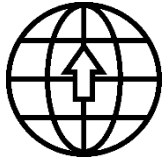
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# Experts in what consumers want and why



## TRENDS

Mintel is a world leader in trend spotting and market predictions with observers and analysts in 20 countries



## CONSUMERS

Mintel conducts primary research with 40,000 consumers around the world every month



## ANALYSTS

Mintel has 200 global category, consumer and functional analysts



## PRODUCTS

Mintel purchases 1,500 new products, in 62 countries, every day



## MENU INSIGHTS

Mintel collects thousands of US menus every year to track trends in the menu optimization, flavors, ingredients and preparation



## CONSULTING

Mintel strategists provide custom problem solving and actionable advisory

# When it comes to clean label, what matters to consumers?



Today



Tomorrow

# Clean label is and – and always has been – – about health and safety

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Clean label products will need to adapt to address new health and safety concerns, especially in the wake of the concurrent repercussions of climate change and the COVID-19 pandemic.



# Clean label: how it started



Simple ingredients



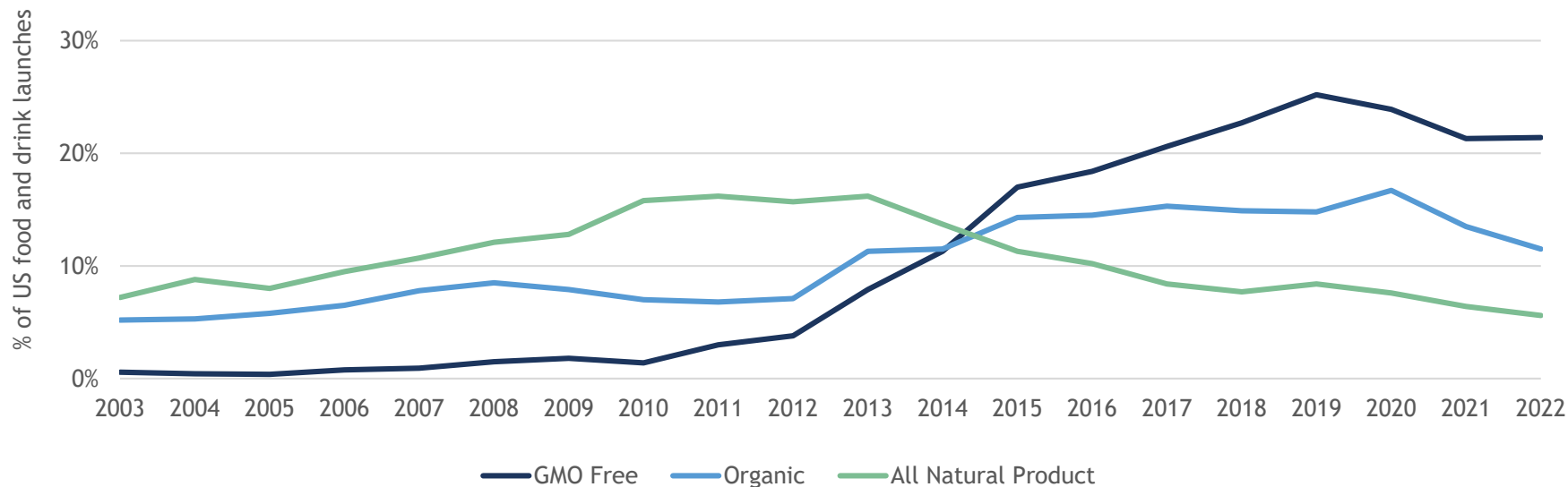
Free-from claims



Real and natural

# Clean label: how it started

US: Select claim activity, % of food and drink launches, 2003-22



Source: Mintel GNPD, 2003-22

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# Free-from claims are now more common in the US than “all natural”

As the definition of “natural” is ambiguous in the US, there has been a shift to clean labels and free-from claims to help define what a brand means by “natural.”

IN 2022, ONLY

**6%**

of US food and drink launches  
made an all natural product  
claim

IN 2022

**23%**

of US food and drink launches  
made a no  
additives/preservative claim

IN 2022

**21%**

of US food and drink launches  
made GMO-free claim



# Clean label: how it's going

In addition to ingredients, clean label has expanded to include processing, packaging, as well as ethical and environmental concerns.



Supports clean diets

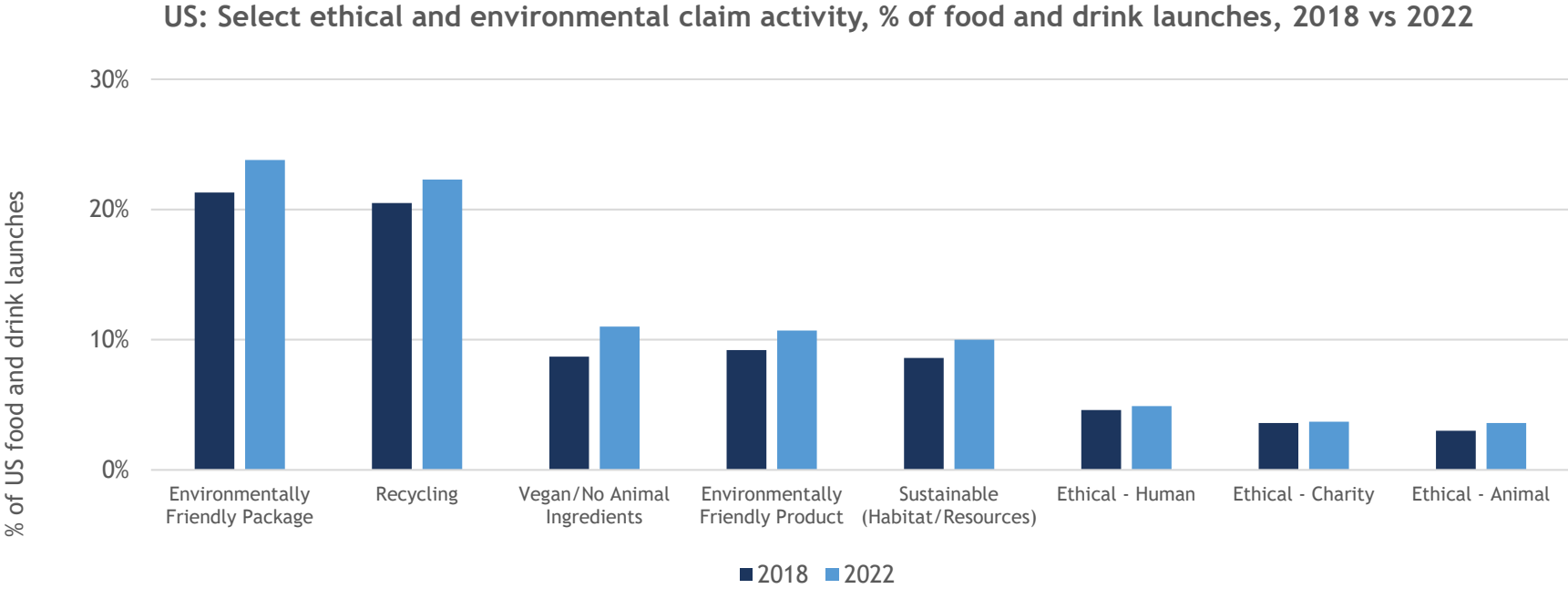


Aligns with values



Sustainably sourced

# Clean label: how it's going



Source: Mintel GNPD, 2018-22

**Safety will drive health and sustainability  
trends to converge in clean label**

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# Clean label: what's now and what's next?

1

**Minimalist Messaging**



2

**Conserve resources**



3

**Keep people and the planet safe**



# Minimalist messaging

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# Streamline communication to the essential selling points

## Pare down information to better connect with overwhelmed consumers

- Focus on key benefits on pack - and save stories for websites, social media and marketing. Stick to the benefits that are integral to value
- Consumers want to easily find products that fit their needs and save them money as the cost of living rises

## Drive value with nutrition and long-lasting foods

- Ingredients that support versatile and long-lasting products will resonate
- Over time, the conversation of value will shift towards nutrition quality and the role food science plays in curbing nutrient waste



Bagrry's Muesli simplified its design from its Jan 2022 pack (India)

# Consumers will be looking for ways to save

With costs of living on the rise in many markets, offer products that help consumers stay within their budget. Communicate value by emphasizing nutrition and versatility.

WORK WITH CONSUMERS' BUDGETS

39%

of adults in the US agree price is the primary factor in their food and drink product choice when shopping for food and drinks

SAVE MONEY BY REDUCING FOOD WASTE

56%

of adults in Canada are concerned about food waste when purchasing food and drinks in stores

MAKE IT MORE VERSITALE

43%

of adults in Mexico\* agree a food/drink product that can be used in many different recipes indicates it is good value for money

*\*taken from Mintel's Global Consumer*

*Base: US: 2,000 internet users aged 18+; Canada: 2,000 internet users aged 18+; Mexico: 1,000 internet users aged 18+*

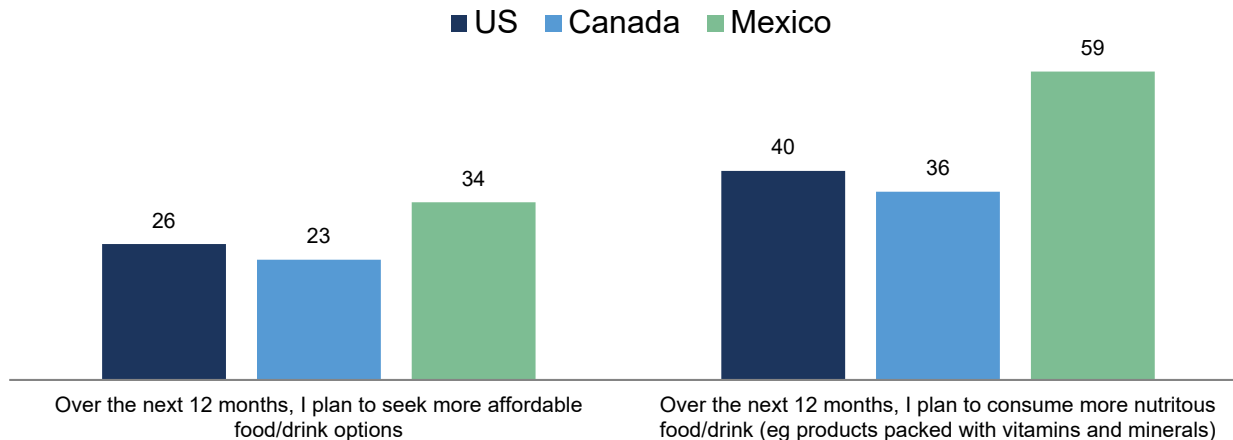
*Source: Kantar Profiles/Mintel, Oct 2022, Nov 2021; Offerwise/Mintel, Aug 2022*

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# Help consumers meet their goals of eating more nutritious foods while also sticking to a budget

Select markets: food and drink aspirations, % agree, next 12 months\*, 2022



Help consumers with their food budgets by offering products with longer shelf-lives

Explore new ingredients and processes that help reduce food waste

\* taken from Mintel's Global Consumer

Base: Canada, Mexico, US: 1,000 internet users aged 18+ in each market

Source: Kantar Profiles/Mintel, Offerwise/Mintel, March 2022

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# Solutions to increase shelf-life will be prioritized

The challenge will be to balance consumers' need for longer-lasting products with their desire for cleaner labels.



Sustainable and long-lasting oat  
milk drink mix, creating less food  
and packaging waste  
Germany



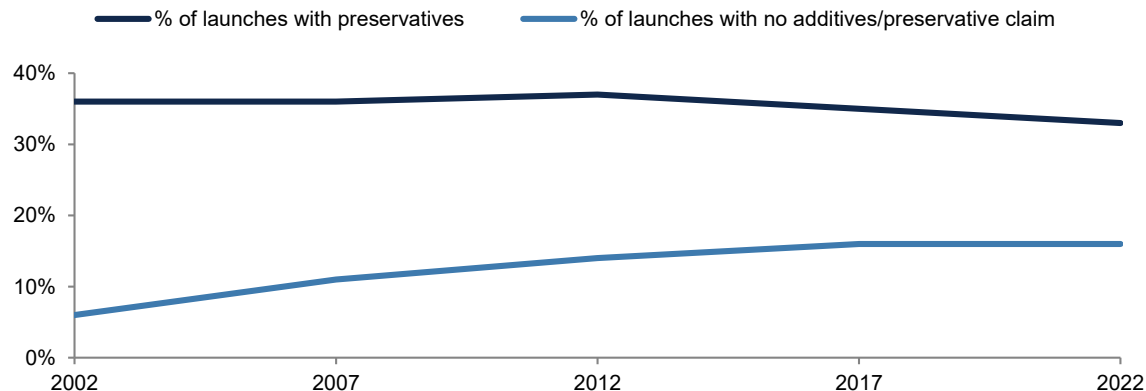
Naturally leavened, stays fresh  
without preservatives  
Brazil



Egg alternative that has been  
treated with HPP to maintain  
flavor, freshness and nutrition  
UK

# Natural preservatives are well-positioned as consumers seek value in long lasting products

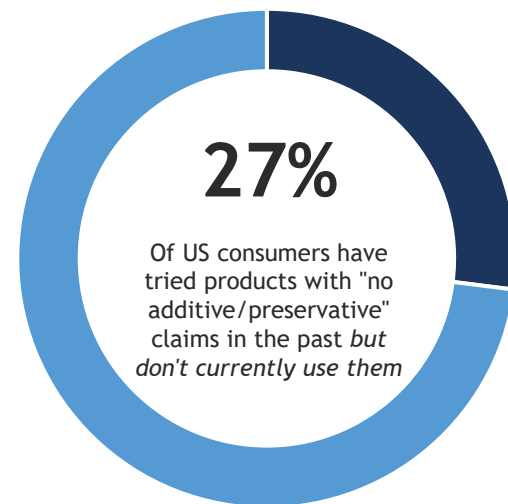
Global: preservative trends, % of food and drink launches, 2002-22



While launches with preservatives have dipped, no additive/ preservative claims have plateaued

Base: 2,000 internet users aged 18+

Source: Kantar Profiles/Mintel, July 2022



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# Moderation is key for many when it comes to ultra-processed foods

In Latin America and Europe, health agencies are including aspects of NOVA in national dietary guidelines. Pressure is mounting in the US too.

HIGHLY PROCESSED IS A TOP CONCERN

**34%**

of US adults agree "highly processed" is one of their top three concerns when purchasing a food or drink

BUT MANY SEE IT OK IN MODERATION

**55%**

of US consumers\* agree highly processed food/drink (eg chips, soft drinks) are fine in moderation as part of a balance diet

AND ARE LOOKING FOR GUIDANCE

**66%**

of US consumers\* agree warning labels on products are useful for determining if a food or drink is healthy (eg advising of high sugar or high salt)

*\* taken from Mintel's Global Consumer*

*Base: 2,000 internet users aged 18+, 1,000 internet users aged 18+*

*Source: Kantar Profiles/Mintel, July 2022, August 2022*

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# Shift the conversation towards nutrition quality

*Ultimately, the parameters of what makes or doesn't make a food ultra-processed may be lost on average consumers.*

*Instead, when appropriate, focus on the end benefits for consumers - and how these foods will affect their lives and health. Nutrient density and nutritional quality will rise to the top.*



# What's next? Reducing nutritional waste



Base: 1,932 internet users aged 18+ who are responsible for food/beverage shopping

Source: Kantar Profiles/Mintel, March 2022



Western Family™ frozen vegetables are harvested straight from the field at their ideal ripeness and quick frozen to preserve their natural minerals and nutrients. Just field picked freshness you can enjoy from your own freezer.

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# Conserving resources

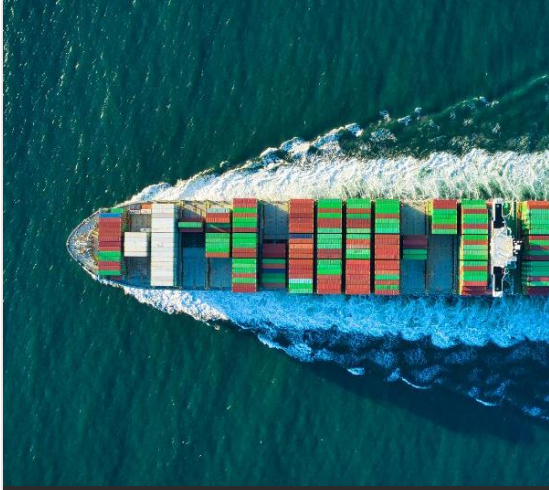
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As consumers come to realize the urgency to act on environmental and social issues, they are holding manufacturers responsible.





# Three challenges for food distribution



Transportation and energy costs



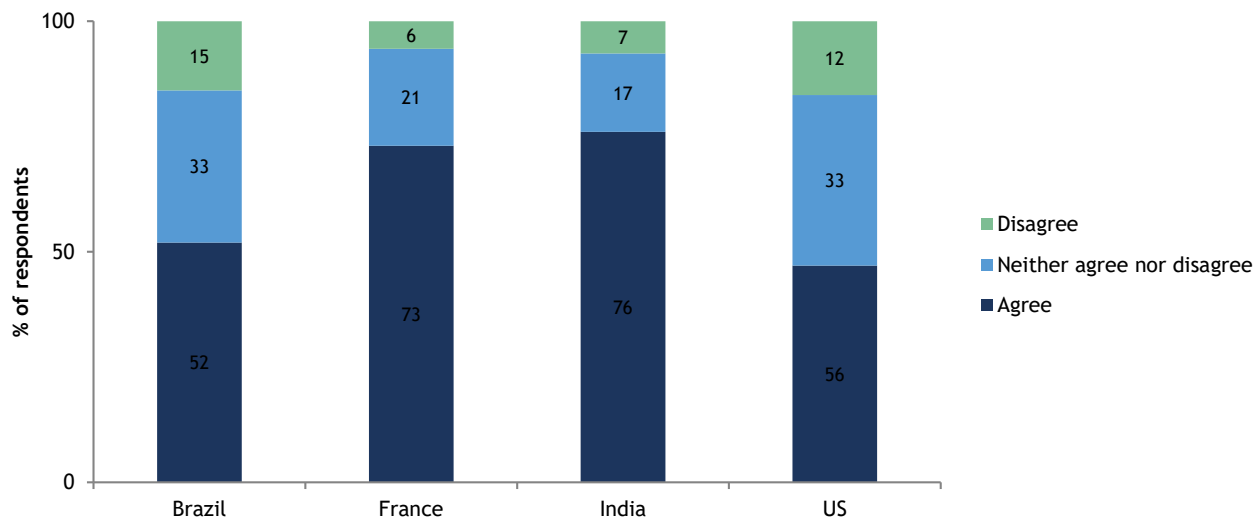
Wastage



Climate change

# Consumers are connecting the impact of carbon footprint and emissions caused by transportation

Select global markets: consumer attitudes toward supply chain, ethical and environmental issues - "The farther food/drink has to travel to a store, the worse it is for the environment", 2022\*

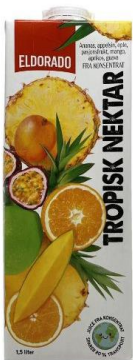


The farther food/drink has to travel to a store, the worse it is for the environment, believe consumers.

While this is true for some foods - eg some fresh produce - the energy required to grow them in heated greenhouses can exceed the energy required for transportation.

Base: India, South Africa and US: 1,000 internet users aged 18+ in each market; Brazil and France: 1,000 internet users aged 16+ in each market  
Source: Kantar Profiles/Mintel, Dynata/Mintel, March 2022

# Talk about transportation in a way that relatable to consumers



## Removing water

Eldorado Tropical Nectar is made from concentrate, which is said to save 80% of transportation as the water is added during manufacturing in Norway (Norway).



## Stackable packaging

ICA Finely Chopped Tomatoes feature a stackable packaging format for more effective transportation (Latvia).



## Raw ingredients

Clif Chocolate & Peanut Butter Cereal contain granola clusters made with organic 'naked' oats, which are claimed to help reduce transportation carbon emissions by 35% compared to hulled oats (US).

# Water awareness creates new perks for concentrated products



DM Bio Pro Climate Oat Drink Concentrate makes 1.5 liters (Slovakia)



Uni One Coffee Cube are freeze-dried instant coffee cubes (China)

Anticipate new found appreciation for concentrates and dehydrated formats

- Reduced carbon footprint
- Longer shelf lives
- Reduced food waste
- Versatility and customizable

Beauty, household and personal care products can be an inspiration for formats that treat water as a luxury

# More respectful use of resources will become a priority

This includes saving energy, water, and reducing waste. The United Nations reports that the world's population will need about 60% more food by 2050, but the amount of water used in agriculture can only increase 10% from today's levels.

BENEFIT THE ENVIRONMENT

**78%**

of Canadians are willing to try foods and drink that benefit the environment

COOK SUSTAINABLY

**60%**

of US consumers who cook think it's important that ingredients are sustainable (carbon-neutral, sustainable packaging)

WATER WOES

**31%**

Of US consumers included water shortages amongst their top three environmental concerns in 2022

*Base: Canada: 2,000 internet users aged 18+; US: 1,912 internet users aged 18+ who cook; US: 1,000 internet users aged 18+  
Source: Kantar Profiles/Mintel, November 2021, 2021, April 2022*

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# Resilient crops that use minimal resources will be celebrated

As climate change strains ecosystems, the foods of the future will need to be able to tolerate a range of temperatures, as well soil conditions and other environmental factors.

Ingredients that will thrive will require minimal input to grow and cultivate

- have a low water footprint
- low emissions
- short growing cycle
- Require minimal fertilizers
- nutrient-dense
- improve soil health
- support pollinators



Kernza is a perennial grain with a naturally deep root system that can help store carbon in the ground and prevent soil erosion to keep the water clean



# Manufacturers like BrewDog are stepping up responsibility

BrewDog, a Scottish craft brewer, claims to be the world's first carbon negative brewery

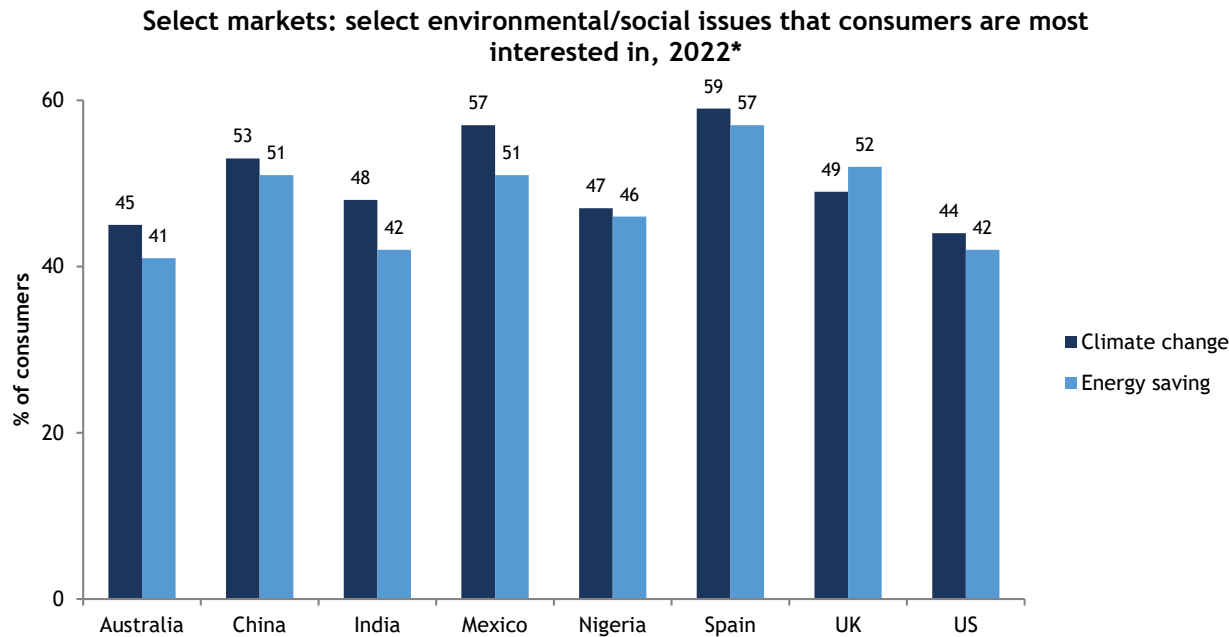
BrewDog is employee and community owned, and shares 50% of its bar profits with the teams who work there



BrewDog Lost Planet First Lager



# Energy savings will be part of future clean label products



High energy costs are impacting consumers, creating a need for ways to save energy. **Brands can share how food and drink uses less energy to store or prepare.**

Expect to see more microwaveable claims and air fryer instructions because these appliances save energy compared with ovens.

Base: Australia, China, India, Mexico, Nigeria, US: 1,000 internet users aged 18+ in each market; Spain, UK: 1,000 internet users aged 16+ in each market  
Source: Dynata/Mintel; KuRunData/Mintel; Offerwise/Mintel; Kantar Profiles/Mintel, August 2022

# What's next: inspire consumers to embrace 'new' cooking methods

Show consumers how to use resource-efficient cooking tools



Made for Instant Pot



Perfect for Air Fryer



Bake everything at 425F for 30 minutes

Staying safe

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# 'Better-for-us' will be the new 'better-for-you'

**Stay true to clean label's roots in health and safety**  
Sustainability will move from a "nice to have" to a "must have" for innovation. Put sustainability first to preserve the earth's precious and life-sustaining resources, such as soil and water.



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# Do no harm means putting people and the planet first

Following the words of the Hippocratic Oath, companies will need to ensure they are doing "no harm" with the products they are creating.

IN THE US

**22%**

of consumers say the mistreatment of workers in supply chains outside of the country is a social issue that concerns them

IN THE UK

**37%**

of consumers agree the carbon footprint (ie food miles) caused by importing oils makes them unappealing

IN THAILAND

**38%**

of consumers prioritize products with sustainability claims/practices over others and plan to continue doing so in the next year

*Base: US: 500 internet users aged 18+; UK 2,000 internet users aged 16+, Thailand: 1,500 Internet users aged 18+*

*Source: Kantar Profiles/Mintel Consulting Sustainability Barometer, March 2021; Kantar Profiles/Mintel, Oct 2021; Dynata/Mintel, Jul 2022*

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# Packaging must also be addressed for a product to be authentically clean and conscious

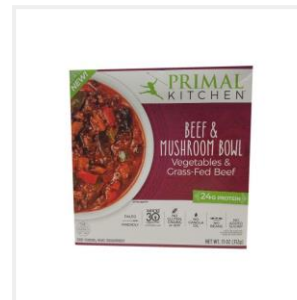
Sustainability endeavors will need to include packaging. Environmental contamination from plastics and PFAS will keep packaging at the forefront of the clean label debate.



Packaging from recycled material  
Plant-Based New England Style Crab Cakes retails in an 8oz pack made of recycled material. The manufacturer's mission is to make plant-based seafood products without the anxiety of mercury, microplastics and overfishing.



Paper-based containers  
Chobani Oat's new cup is made with responsibly sourced and renewable material, according to the company's [press release](#). It uses a thin plastic lining to retain product integrity and is 80% paperboard.

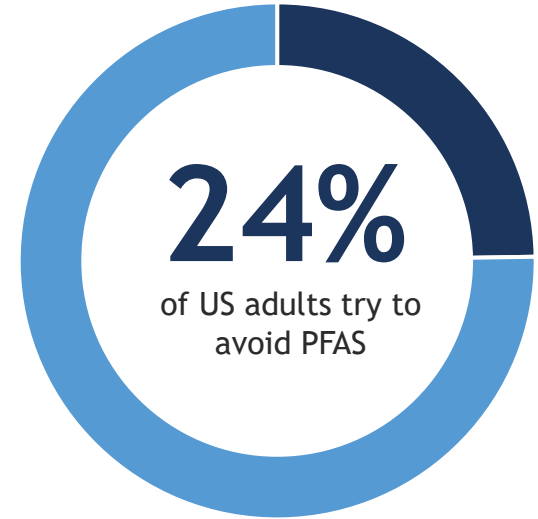
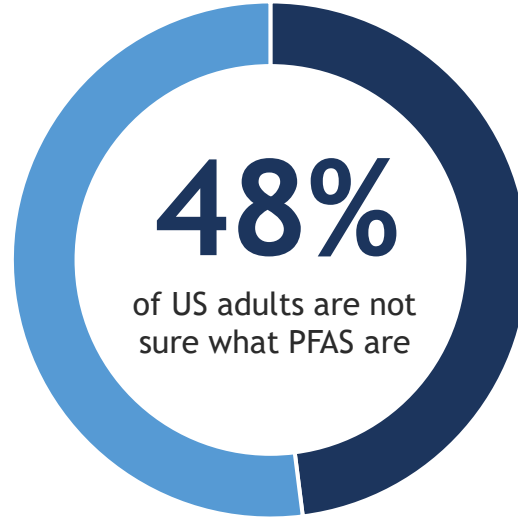


Free from PFAS  
Primal Kitchen Beef & Mushroom Bowl from the US uses a PFAS-free bowl, made from upcycled sugar cane fiber. The product also aligns with other clean label trends, such as free from gluten, grains, soy, canola oil, beans and added sugar.

# Food products will be judged by the chemicals used in them and around them



PFAS-free bowl made from upcycled sugar cane fiber





# Next-level sustainability practices should consider human welfare

Every package of Farmer Focus chicken is 100% transparent and traceable to the farm where it was raised.

The company has chosen to prioritize not only the care for the land and animals but also fair pay for farmers.



Farmer Focus Toasted Lager Organic and Free-Range Half Chicken



Farmer Focus Rich Red Curry Organic and Free-Range Chicken Thighs

# Chobani takes action against economic inequality from within

# 48%

of US consumers say that companies are most responsible for ensuring fair conditions and fair pay for workers

Chobani has also adopted a US\$15 'starting' wage for its employees, aiming to reduce hunger among its workers.

By communicating its pay policy, Chobani points out that the minimum wage is, in fact, not sufficient for a decent life. Chobani's point of view is shared by 79% of US consumers who, during the pandemic (Sep 2020), said that essential workers were underpaid and underappreciated.



Base: US: 1,000 internet users aged 18+

Source: Kantar Profiles/Mintel Consulting Sustainability Barometer, April 2022

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# What you need to know

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The next generation of successful clean label products will be those that understand the convergence of health and sustainability trends.

# What we think

1

## Re-evaluate what safe means

Clean label has always been rooted in safety, but safety has taken on new relevance in the wake of climate change and COVID-19.

Today's safety concerns related to clean label are expanding beyond ingredient statements to include important issues such as sustainability, clean agriculture, and the welfare of animals, farmers and workers.

2

## Go clean and conscious

Clean label products will need to go further to show why these claims make a difference in order to connect with cynical consumers.

Clean products can extend their appeal with traceable commitments to ethical and environmental causes that contribute to the greater good. Clearly educate how novel ingredients help people and the planet.

3

## Think long-term for health and sustainability

Sustainability initiatives will need to be about improving the future of people and the planet for the long term.

Past industrial practices have resulted in today's safety concerns surrounding the combination of plastics and chemicals in the food supply, illustrating that personal health is tied to the health of the planet.

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Experts in what consumers want and why

## Thank you!



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