



Getting Ahead of the Curve: Sodium

By Dr. A. Elizabeth Sloan

The 2010 U.S. Dietary Guidelines Committee report, mandatory menu labeling for restaurants, and a new American Stroke Association at the American Heart Association are among the new forces fueling the lower sodium movement. And, with pediatricians now checking blood pressure as early as age 3, one in three U.S. adults suffering from hypertension and 79 million pre-hypertension, the negative climate will grow stronger still.

Sales of foods/beverages carrying a lower/reduced/no sodium claim reached nearly \$15 billion in mass channels, excluding Wal-Mart for the year ended 12/27/09, according to the Nielsen Co. The number of products touting a sodium claim grew 10%. One-third (34%) of food shoppers bought more lower-in-sodium items in 2010 compared to the previous year [Food Marketing Institute (FMI), "2010 Shopping for Health"].

Sodium now ranks 2nd only to calories as the ingredient most looked for by the 65% of consumers who read nutritional labels, reports IFIC's "2010 Food & Health

Survey." Low sodium ranked 3rd behind whole grain and high fiber as the most sought after health claim on food packages—overtaking low fat—according to FMI's "2010 U.S. Grocery Shopper Trends." More than half (53%) of consumers are extremely (18%) or somewhat (35%) concerned about sodium per IFIC.

Most important, concern over sodium is bringing with it a new series of potential market opportunities. Are Americans getting enough potassium? Should magnesium play a greater role in heart health? What about the increased incidence of hypertension in children and the growing incidence of stroke in younger adults, as stroke cases decline in those age 65+?

Market Potential

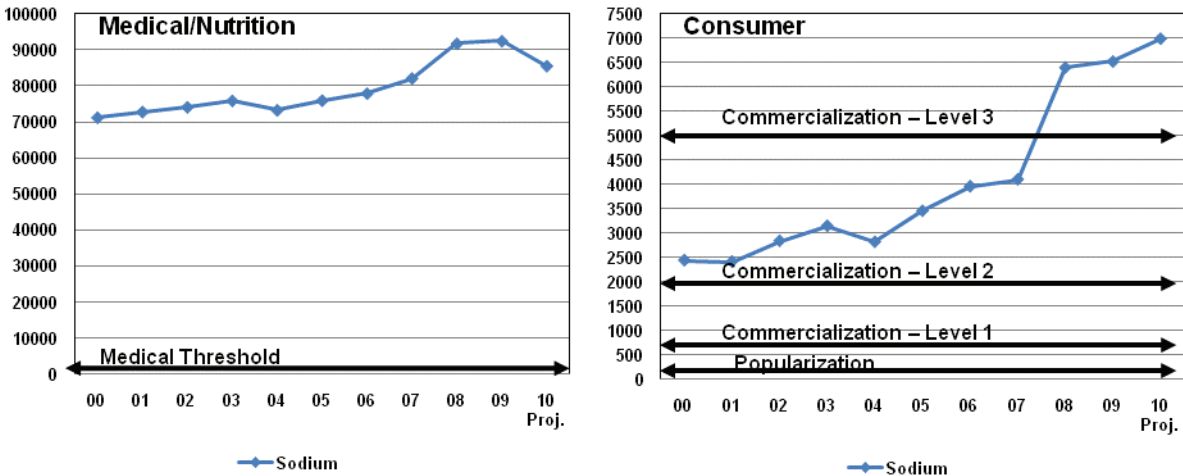
According to Sloan Trends' TrendSense model, sodium is an enormous Level 3 mass market opportunity, which has accelerated steadily during the past decade. A major jump in research/medical activity and funding around 2006-07 shot consumer activity and the marketability of low sodium products into the limelight.

Despite an apparent leveling off of the Medical trend line, because the activity level is so large—around 90,000 new studies worldwide per year—even a small change in Medical Counts represents an enormous amount of new data and fresh opportunities for news/messages in the marketplace. In a gigantic category, e.g., sodium, a flattening in Medical Counts is unlikely to slow the movement down.

Growth Opportunities

- > 4 in 5 consumers believe that low sodium (85%) and

TrendSense™ Predictive Model: Sodium



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* Although there are many factors that go into determining consumer trends, measuring how medical/nutrition activity levels have risen over the past decade, as well as some of the key milestones that have occurred and how these issues have been understood and embraced by the public are essential in predicting the sustainability of the Consumer trend line.

low-salt (84%) foods are healthier (Technomic, “The Healthy Eating Consumer Trend Report, 2010”).

- 60% regularly purchased reduced/lower sodium foods in 2010 (IFIC, 2010).
- 63% of Boomers, 57% of Gen Xers and 46% of Gen Yers are deliberately trying to avoid salt/sodium in their diet (The Hartman Group, “2010 Reimagining Health & Nutrition”).
- 59% are interested in learning the amount of sodium they should consume; 53% which foods/beverages are high/low in sodium; 55% how sodium impacts their health; 48% who should be concerned about sodium (IFIC, 2010).
- Heart health is now the 2nd most frequent positioning for new functional foods/drinks in the U.S. market (Innova Market Insights, 2010).
- More than 90% of Americans will develop hypertension in their lifetime (AHA, 2010).
- Nearly 50% of U.S. households have someone with HBP; 87% of those with HBP use Rx meds, but nearly 50% also rely on a healthy diet (IRISymphony, 2010).
- Consumer concern over HBP is skewing younger: 40% Gen Yers are very concerned, 48% Gen Xers and 66% of Boomers (The Hartman Group, 2010).
- Of the 42% of grocery shoppers who have hypertension or perceive they are at risk, 65% have changed their purchasing habits (FMI, “U.S. Grocery Shopper Trends,” 2009).
- HBP has tripled in the past decade in U.S. children (NIH/CDC).
- The low income market is expected to bring in \$115 billion in incremental CPG sales in the next 10 years; 46% of those in households with incomes <\$25K and 54% with incomes \$26K-\$50K want more low salt/sodium foods (IRI “Low Income Report,” 2010).
- Only 28% of diners say they look for low sodium when ordering at a restaurant vs. 56% in grocery stores. In restaurants, 35% would be willing to pay up to 10% more for low sodium menu options (Technomic, 2010).
- Healthy options for kids ranked as the 2nd hottest trend for 2010 among quickservice restaurant operators. Am. Culinary Federation chefs ranked kids nutrition 6th, and nutrition/health 15th as the hottest overall restaurant trends for 2011 (Nat’l Restaurant Assn. “What’s Hot?” 2009, 2010).

Functional Foods & Beverages

More than half (52%) of consumers are looking for functional foods/drinks that help lower blood pressure (Mintel, “Functional Foods-US,” 2009). Among those who have purchased lower/reduced sodium foods, 58% bought canned soup, 48% snacks and 41% canned

vegetables. Four (43%) in 10 say low sodium is an important snack attribute, ranking right behind, no trans, low fat, low sugar and low calorie—and equal to whole grains (IRI SnaxPo, 2010). Dollar sales of snacks carrying a low sodium claim grew 7% in mass channels and convenience stores in 2009.

With swapping for a healthier version of the same product being the most common way shoppers choose to improve the healthfulness of their family’s diet, offering low sodium alternatives to favorite foods will become commonplace (FMI, “Shopping for Health,” 2010). With 49% of all meal preparers cooking more from “scratch” compared to 2009, low sodium versions of basic cooking ingredients and healthier, lower sodium sauces, spice mixtures and condiments will find a welcome market.

References furnished upon request.

About the author: Dr. A. Elizabeth Sloan is president of Sloan Trends, Inc., Escondido, CA, which is a consulting firm that offers trend-tracking and predictions, strategic counsel and business-building ideas for food, supplement and pharmaceutical marketers. Each month she will provide analysis and discuss opportunities of a particular market being covered in a given issue.

SLOAN TRENDS’ TRENDSENSE is a 15-year-old trend tracking system, which identifies and quantifies trends as well as predicts the optimal timing, sustainability and life-cycle stage of ingredients, terms, product opportunities and related market issues.

The model displays medical and consumer “activity levels” based on a comprehensive analysis of five critical sources of information—consumer, trade and competitive, legal and regulatory and media coverage. The resulting charts give insight into the market’s changing health issues and concerns, the ingredients that are up-and-coming and those that have just about run their course, as well as what health claims, marketing messages and products will bring your company the most success.

- **Emerging Phase** = Trends begin to appear on the radar screen. Companies should begin to collect literature and market details for those that exhibit continual growth and that might be of interest.
- **Popularization Phase** = Medical/Nutrition crossover to consumer media and marketplace; opportunity for niche or specialty markets. Marketers/manufacturers should begin a detailed evaluation of the supporting marketing and scientific data and determine if this term/trend offers a good strategic fit and is appropriate to pursue. Appropriate product development procedures should be undertaken.
- **Commercialization Phase** = Mass-market ready. Mainstream consumers have a significant degree of familiarity with the term/trend and there is opportunity for competitive advantage by getting out ahead of the competition or by providing a unique and highly innovative product positioning for success.