



Getting Ahead of the Curve: Diabetes & Blood Sugar Management

By Dr. A. Elizabeth Sloan

Two first-time ever campaigns by the world’s leading diabetes associations have put efforts to prevent, curtail and cope with diabetes on the front burner, creating a bevy of new supplement and functional food/beverage opportunities.

In September 2011 the International Diabetes Foundation (IDF) launched its first-ever “Global Diabetes Plan,” with a focus of joining forces with the UN’s Non-Communicable Diseases Summit to combat diabetes, cancer, heart and chronic respiratory diseases worldwide. Stateside, the American Diabetes Association (ADA) introduced a new prevention campaign, “Join the Millions in the Fight to Stop Diabetes,” shining a new spotlight on risk factor control.

New cases of adult diabetes in the U.S. continue to be diagnosed at epidemic rates; 1.9 million in 2010 (ADA, 2011). Led by India and China, IDF estimates that 366 million people globally struggle with the disease. In 2010, 22.7 million U.S. households had a member coping with diabetes, according to SymphonyIRI’s 2010 “OTC Medication Report,” which estimated the annual sales potential for diabetes related OTC drugs and supplements at \$3.4 billion.

But, while marketing products to America’s 18.8 million diagnosed diabetics is often difficult as they tend to be very Rx dependant, it’s the precursor and risk factor reduction markets that perhaps offer the greatest opportunity. The Centers for Disease Control & Prevention

(CDC) report that 79 million U.S. adults are pre-diabetic. Moreover, 35% of men and 33% of women age 20+ have Metabolic Syndrome; 1 in 10 or 2.9 million kids aged 12-19.

High blood glucose is the 4th largest cause of preventable death in America—behind smoking, obesity and high blood pressure (*Danaei et. al., PLoS Med. 2009 Apr 28;6(4):e1000058. Epub 2009 Apr 28*). High cholesterol, high trans fatty acids, low omega 3s, high sodium, alcohol and low intake of fruits/vegetables all caused fewer deaths compared with high blood glucose.

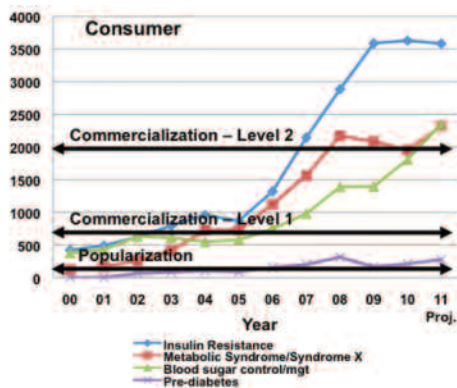
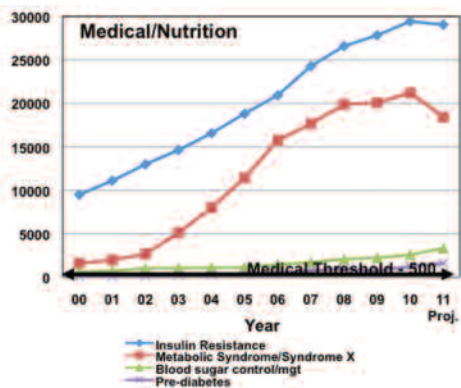
Market Potential

According to Sloan Trends’ TrendSense model, diabetes reached Mega Market status in 2006 and remains among the largest and fastest growing nutraceutical market opportunities in 2011. Medical Counts have accelerated at an explosive rate throughout the decade with more than 180,000 new research studies published in 2010. Diabetes and children is currently a very large and highly desirable High Level 2/Low Level 3 mass market.

All four diabetes-precursor/risk factors shown below are also enjoying meteoritic growth in Medical Counts, showing strong and growing scientific support for their relationship to diabetes, although their degree of marketability is currently at different levels and lifecycle stages.

Insulin resistance is a large and stable Level 2 mass market opportunity—on par with vitamin D and omega 3s. There is no doubt that loss of insulin sensitivity increases the risk of developing type 2 diabetes and other manifestations of metabolic syndrome. It is a well defined and recognized biomarker that essentially constitutes “healthy blood sugar levels.”

Metabolic Syndrome became a Level 2 mass market in 2007, along with blood sugar control/management in 2010, although they have respectively been a mass market opportunity since 2003 and 2005. While Medical Counts appear to be somewhat lower for blood sugar management than Met X or insulin sensitivity, they are at a respectable 2500 and will maintain a strong Level 2 or



* 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.

very high Level 1 mass market for the foreseeable future.

Pre-diabetes has been flirting with crossing into the Popularization Phases since 2006 and is now perfectly positioned to attract health food/specialty shoppers and very healthy conscious and condition-specific consumers. Marketers focused on these channels should have products and promotional materials in place. The Glycemic Index is also similarly poised as a specialty channel opportunity at this time.

Growth Opportunities

- In the U.S., nearly 26 million children and adults have diabetes; 7 million have not yet been diagnosed (ADA, 2011).
- ADA and NIH recommend those aged 45+ be tested for pre-diabetes regardless of weight.
- America's 78 million Boomers are in the age group (40-64) most likely to be diagnosed with diabetes (ADA, 2010).
- By 2020, 52% of the U.S. adult population will have diabetes or pre-diabetes (United Healthcare, "United States of Diabetes" Nov. 2010).
- America's increasing ethnic mix will fuel diabetes growth—incidence 6.6% Whites, 11.8% Blacks, 10% Hispanics, 7.5% Asian Americans (ADA, 2010).
- 42% of primary grocery shoppers are *extremely* or *very concerned* about diabetes (HealthFocus, 2011).
- 26% of consumers always/usually choose foods to "manage blood sugar levels" (HealthFocus, 2011).
- Those 55+ are most interested in foods that help maintain healthy blood sugar levels; one-third of the U.S. population is aged 55+ (Mintel, "Functional Foods 2009").

Functional Foods

Blood sugar management represents a fast accelerating opportunity for functional food marketers not only as it relates to diabetes, but also to other conditions, e.g. weight, energy, etc.

Half (53%) of consumers want functional foods/beverages that promote healthy blood sugar levels (Mintel, 2009). More than one-third (36%) of primary grocery shoppers think that "helps maintain healthy blood sugar levels" is a very/extremely important claim (HealthFocus, 2011).

Half (51%) of shoppers also believe that dietary changes can treat or avoid high blood glucose (blood sugar) levels. For perspective, 54% believe the same of high cholesterol (HealthFocus, 2011). Six in 10 (60%) shoppers are *extremely interested* in low glycemic foods that are important for controlling blood sugar levels.

From an ingredient standpoint, clinical studies are demonstrating that resistant starch from high amylose corn significantly increases insulin sensitivity in healthy people and especially in individuals with insulin resistance. The latest clinical trial found a 56-73% improvement in insulin sensitivity in overweight men consuming 3-6 tablespoons of high amylose corn re-

sistant starch/day. Intact whole grains (which also delivers resistant starch) have also been shown to improve insulin sensitivity.

Dietary Supplements

Diabetes already represents a strong and growing opportunity for supplement marketers especially with the new emphasis on prevention. With 75% of consumers looking for multi-functional supplements, diabetic products that also help to alleviate other health issues/risk factors will be in high demand. For example, risk of stroke is 2-4 times higher in diabetics, 64% take Rx drugs for blood pressure, 50-70% have mild/severe nervous system damage, 57% high cholesterol and 80% are overweight (ADA, 2010). FDA requires that diabetes medicines also be checked for heart disease risk, because the connection between the two conditions is so strong.

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.