

Sloan Trends

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Getting Ahead of the Curve: Antioxidants

By Dr. A. Elizabeth Sloan

Antioxidants have been on a growth streak, with claims now touted in nearly 200 segments across the traditional supermarket and super center selling floor. The Nielsen Co. reports U.S. sales of food and drinks carrying an antioxidant claim topped nearly \$2 billion for the year ending 11/28/09, up from \$889 million in 2005; volume sales of antioxidant-touting nutritional supplements grew 10%.

But as the antioxidant market matures, consumers will look for more specific antioxidant sources and products that better align with the individual health benefits they associate with antioxidants. And, a big opportunity that will be! A recent analysis of 4000 antioxidant-carrying new products by Innova Market Insights found that 58% still carried general antioxidant claims, 38% specific claims linked to an ingredient/fruit and only 5% a specific functional benefit—most commonly, green tea, pomegranate, blueberry and acai.

Market Potential

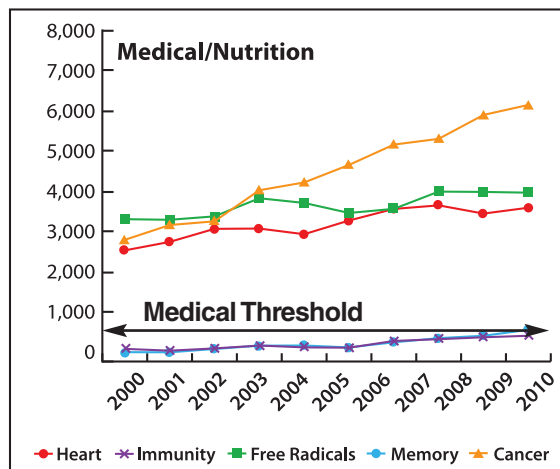
According to Sloan Trends' TrendSense model, market interest in antioxidants overall—and supporting medical research activity—show little signs of slowing down, despite some recent negative publicity. But as the market has become more sophisticated, a new hierarchy of antioxidant benefits has emerged, representing some untapped, as well as overlooked, opportunities.

While heart health and cancer have long been the most associated mass market health linkages for antioxidants by far, it appears that the American Heart Association's 2008 position on the ineffectiveness of antioxidant vitamins in protecting heart health has negatively impacted the receptivity of the heart/antioxidant connection in the marketplace. The cancer linkage, on the other hand, continues to gain strength.

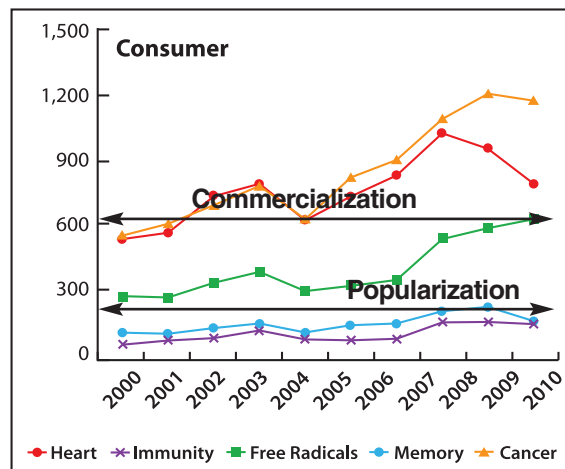
Undoubtedly, the most overlooked mass market opportunities lie in the positive effect of antioxidants on the skin and their role in anti-aging, which both crossed into the Commercialization Phase in 2007. Moreover, the original theory of "quenching free radicals" still represents a strong, viable and virtually untapped mass market message. All three now rank only slightly behind heart disease in the TrendSense model.

While antioxidants and eye health is poised to be a mass market opportunity, antioxidants and memory, immunity, wrinkles and joint health remain much more limited in terms of market potential—currently of interest mainly to condition-specific and health/specialty channel shoppers.

TrendSense(TM): Antioxidants & Specific Health Linkage Trends



Source: Sloan Trends Inc. 2010



* 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.

Growth Opportunities

- Antioxidants and “superfoods” are now second only to whole grains and “low in” food claims as “important” in maintaining good health (IRI, 2009).
- 78% of consumers used antioxidants in some form in 2008; 22% increased their use (HealthFocus); 30% of Americans have used antioxidant supplements (Am. Heart Assn.).
- “A good source of antioxidants” is an “extremely/very important” claim for 47% of consumers (HealthFocus); 60% stay loyal to a product due to its antioxidant claim (NFM, 2009).
- The following antioxidant-linked benefits are among America’s top health concerns: mental sharpness 65% concerned, cardio 62%, cancer 61%, eye 57%, arthritis 53%, appearance/skin 51%, joint 51% (HealthFocus).
- New market potential: only 13% of parents are trying to increase their children’s antioxidant intake (IFIC).
- The appeal of antioxidants is global, with more than 1600 new antioxidant foods/drinks in 2009 (Innova).

Functional Foods & Beverages: Antioxidants top the list of nutraceutical ingredients that 60% of food R&D executives believe will benefit sales of their functional products in the next two to three years; 83% think that Americans need more antioxidants; and 43% want to know more about these ingredients (*Prepared Foods* magazine).

More than half (53%) of consumers bought a food/drink for its antioxidant content in 2009 (Packaged Facts); Mintel reports 28% look for antioxidants in a functional food, 36% a drink; 10% and 43% respectively, green tea extract.

Showcasing antioxidants in the context of desirable contemporary health linkages is key. Mintel reports that immunity is a desired functional food benefit for 60%, memory 47%, mental focus 41% and makes facial skin look younger 38%. Nearly eight in 10 (78%) already believe that foods can improve heart health, immunity 71%, mental function 71% and skin/hair 65% (IFIC).

Among shoppers personally affected by a condition, HealthFocus reports that 26% have used fortified foods/drinks for eye problems, 21% cancer, 24% heart and 45% cold/flu.

Moreover, for the first time, antioxidants have moved into the foodservice arena with the advent of antioxidant-touting teas in Subway stores.

Dietary Supplements: With 100 million Americans now over age 50 and Boomers twice as likely to take antioxidant supplements—and those 65+ three times

as likely—it’s time to more closely tie antioxidant benefits to the concerns and afflictions of older Americans (Pkg. Facts).

Among shoppers personally affected by a condition, 26% have used nutritional supplements for eye issues, 17% cancer, 16% heart and 27% cold/flu (HealthFocus). With antioxidant users indexing over twice as high as the general population for looking for organic and natural when shopping for food and frequently taking preventative medicine, naturally sourced antioxidants should have a strong advantage (Pkg. Facts).

*Editor’s Note: See *Nutraceuticals World* Jan/Feb 2010 for a TrendSense discussion of phytochemicals as antioxidants.*

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.