

Consumer Trends in Food and Agriculture

January 2019

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Good News for Farmers

- Increasing food system interest in extending the farmer halo to food brands and products.
- If you're held responsible and trusted for ensuring safe and healthy food, like farmers, you're in a good place. If you're held responsible but are not trusted to deliver, like federal regulatory agencies and food companies, that's a problem.

Most Trusted in Food Related Issues

- 1. Family Doctor*
- 2. Family*
- 3. Farmer*

TRUSTED TO ENSURE SAFE FOOD

1. Family
2. Family Doctor
3. Farmers
4. Dietitians
5. Nutrition Advocacy Groups
6. University Scientists
7. Grocery Stores
8. Federal Regulatory Agencies
9. State Regulatory Agencies
10. Restaurants
11. Food Companies

* Results are similar for ensuring healthy food

HELD RESPONSIBLE TO ENSURE SAFE FOOD

1. Federal Regulatory Agencies
2. Food Companies
3. Farmers
4. State Regulatory Agencies
5. Family
6. Grocery Stores
7. Family Doctor
8. Restaurants
9. Nutrition Advocacy Groups
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Which Consumers?

- The Foodie
 - Factor Foodies, important influencers who actively research and share information, express higher concern for all life issues and are more engaged with food related issues overall.
- Moms
 - While “mom guilt” is real when it comes to providing healthy food to their kids, moms are less likely to feel pressure to eat healthier themselves.
- Millennials
 - Younger consumers (18-27) are more likely to feel pressure to eat healthier in all situations – with family, friends, work colleagues and strangers.

Diverse Groups & Interests

Moms, Early and Late Millennials, Foodies, Early Adopters have differing views and values that must be acknowledged.

Across the Board

- The Diet & Health Connection
 - Of 18 life issues presented, 4 of the 6 most concerning are related to food.
 - For the fourth year “Keeping Healthy Food Affordable” is a top concern, pointing to the increased emphasis on the relationship between diet and health.
- 65% Keeping Healthy Food Affordable
- 63% Affordability of Food
- 59% Food Safety

Where?

Moms & Millennials = Search Engines
Ages 55-65 = Local TV

Trusted Sources of Information

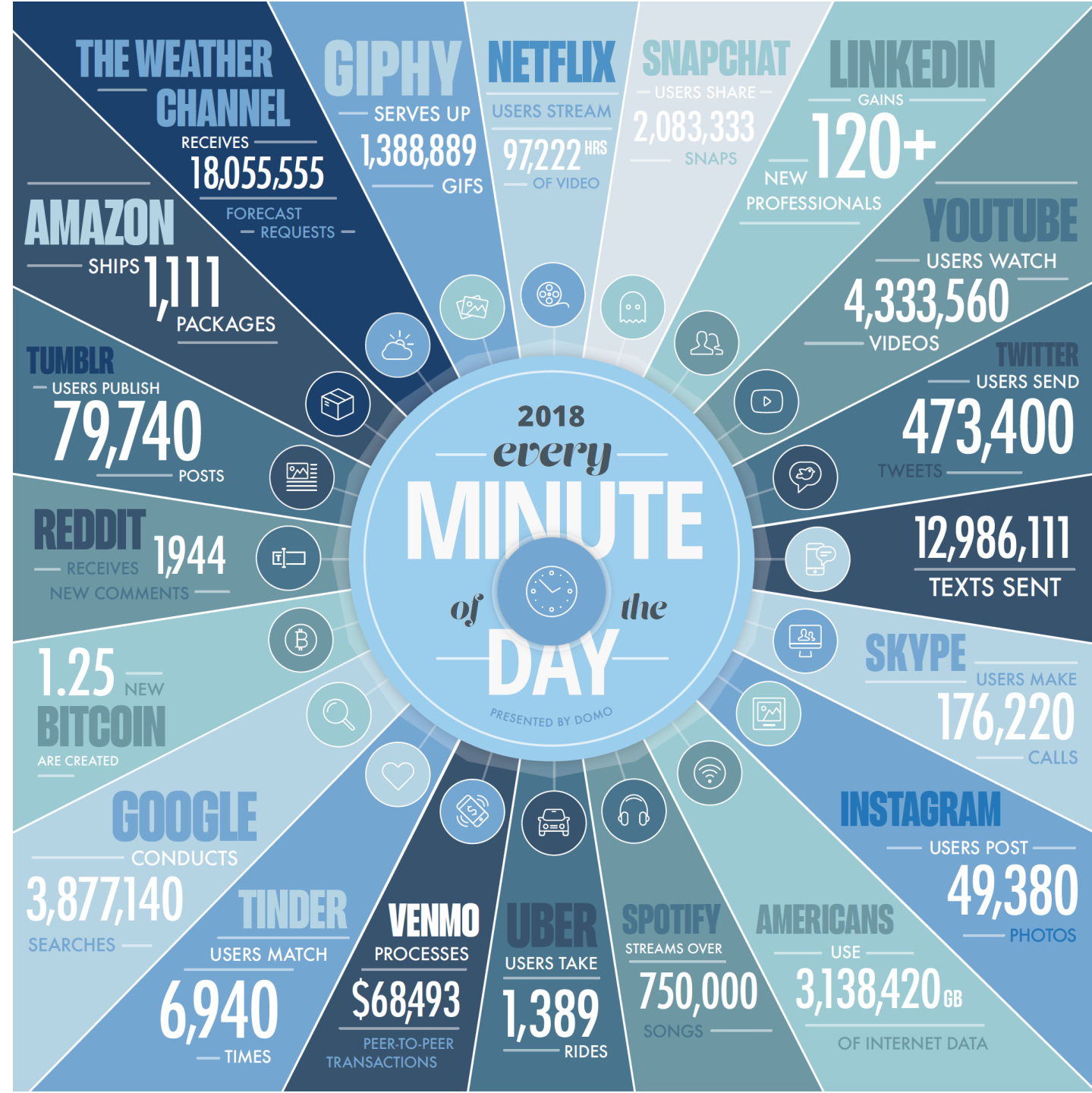
- 17% Search Engines
- 15% Local TV
- 13% Websites & Family

Top 3 Most Searched Food Topics

1. Ingredients in Food
2. Impact of Food on Health
3. Food Safety

We Live in a Changing Environment

Data Every Minute 2018



Top 10 Trends for 2019 #1

Supermarket News

1. Mean New Green (Celtuse-a lettuce cultivar) Romaine Scare
2. “Better for You” Desserts (Hummus, Granola, Berries)
3. Oat Milk (PepsiCo launching an oat beverage under Quaker brand)
4. Cold Brew Backlash (Hot vs Cold Coffee)
5. Lager (Craft brewers increasing, not just ales)
6. Lab-Grown Meat (Tyson and Cargill are invested)
7. Functional Food Ramps Up Wellness (More than Superfoods, CBD, Collagen)
8. Health Based Eating (Keto, Intermittent Fasting, i.e. Soylent)
9. Regional Flavors (Nashville Hot Chicken, Southern Appalachian Pimento Cheese)
10. Bringing Fresh into Shelf-Stable (Protein Bar & Romesco Sauce in Fridge)

Top 10 Trends for 2019 #2

Whole Foods

1. Pacific Rim Flavors (Dragon Fruit, Monk Fruit, Cuttlefish)
2. Shelf Stable Probiotics (Granola, Oatmeal, Soups)
3. Phat Fats (Keto, Paleo, Grain-Free, Coconut Butter)
4. Next Level Hemp (CBD Oil, Seeds)
5. Faux Meat Snacks (Mushrooms as “Bacon” Snacks)
6. Eco-Conscious Packaging (Paper straws, BYOBag)
7. Trailblazing Frozen Treats (Avacado, Tahini, Rhubarb)
8. Marine Munchies (Kelp Noodles, Sea Fennel, Salmon Maple Strips)
9. Snack Time, Upgraded (Charcuterie for One, Organic Chewies)
10. Purchases that Empower (Environmental Stewardship & People Focused)

Theme #1

Sustainability

“The definition of sustainability is extending to encompass the entire product lifecycle. This more circular approach will require companies, retailers, and consumers to embrace their roles in the sustainable sourcing, production, distribution, consumption and disposal of products.”

- Rethink Plastic
- Food Waste Prevention
- Soil Health & Regenerative Agriculture
- Expect more Corporate Sustainability Programs
 - Cargill, Whole Foods, McDonalds, Etc.

Theme #2 Wellness and Healthy Aging

“Preparing oneself for a longer, healthier lifespan is particularly relevant as consumers view health and wellness as a holistic, proactive, and ongoing pursuit.”

- Fortification & Functional Ingredients
- Start with Seniors and work towards younger
 - 20% of US consumers over 65 use a supplement for joint health
 - 56% of UK consumers are concerned about developing dementia
- Learn from Health and Beauty Care
- i.e. Omega-3s, Turmeric, Green Tea Extract, Mediterranean Diet

Theme #3 Elevated Convenience

“The premium preferences of today’s consumers are advancing demand for more natural, nutritious, or customizable products that help people keep pace with busy schedules without sacrificing their health goals or curiosity for new ingredients, flavors, or formats.”

- Across all consumer groups
- Amazon Go, Uber Eats, Speed Scratch/Kits (Blue Apron)
- Foodies drive upgrade of convenience products
- Automated convenience stores present new “fast” food options
- Free up time for other activities
 - 23% of US Consumers would trust Artificial Intelligence to plan meals & purchase groceries

Attitudes on US Ag and Food

Most consumers are hungry for information and a better understanding of the food system

Agriculture

VERY POSITIVE 14%

SOMEWHAT POSITIVE 50%

- Nearly 2 out of 3 hold positive impression
- 65% are interested in knowing more
 - Higher among Foodies, Early Adopters, Women, Younger Consumers

Food Manufacturing

VERY POSITIVE 8%

SOMEWHAT POSITIVE 36%

- Just under half hold a positive impression
- 63% are interested in knowing more
 - Higher among Foodies, Early Adopters, Younger Consumers

Our Opportunity is to CONNECT

- Understand the opportunity: think and talk differently
- Gain skills to ENGAGE in sometimes hard, but meaningful and impactful discussions
- Earn consumer TRUST
- Know which consumer you're talking to
- Farmers are respected, work to be trusted on all things FOOD