



# Matching Consumer Perceptions with New Functional Food & Drinks

September 16th, 2021

Pradeep Srinivasan  
Consultant, Spoonshot

Kevin McCaffrey  
Account Executive, TraceGains

# Meet Your Moderator



Mercedes Howard  
Webinar Specialist



# Meet Your Speakers



Pradeep Srinivasan  
Consultant



Kevin McCaffrey  
Account Executive





**SPOONSHOT**



**TRACEGAINS**

# Matching Consumer Perceptions with Functional Ingredients in Food & Drink

September 16, 2021

# About Spoonshot

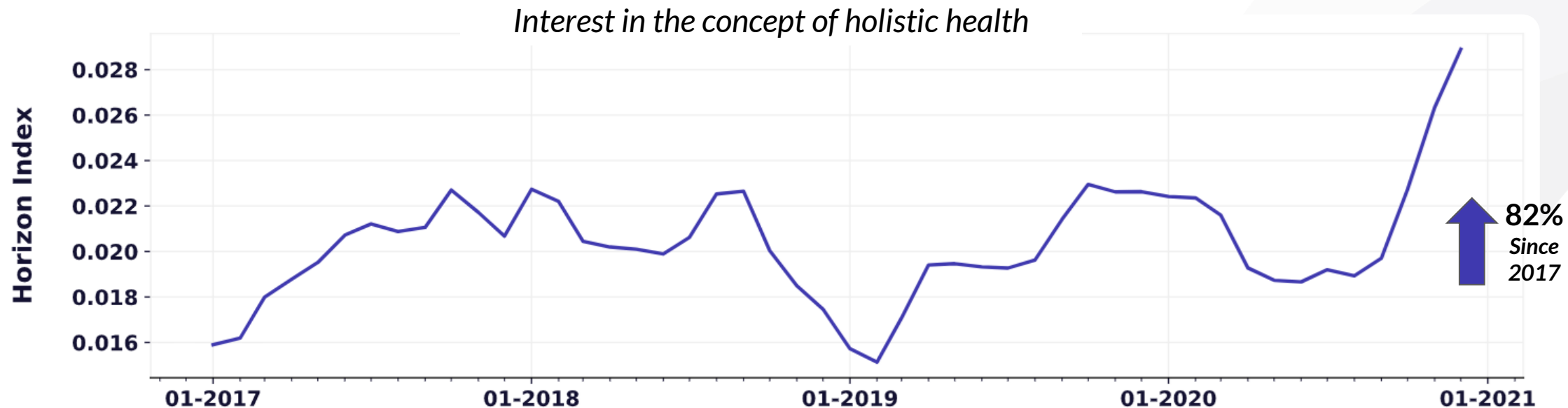
- Our AI, #foodbrain, understands the innovation journey
- Instant insights powered by applying food science
- Leveraging 28K+ open, diverse, and long-tail data sources
- Customers include industry giants and challenger brands





# Drivers & Emerging Health Interests

# Focus on holistic health remains vital for consumers



**29%**

Increase in consumer interest in holistic health during 2020

VS

**-2%**

Decrease in consumer interest in physical health during 2020

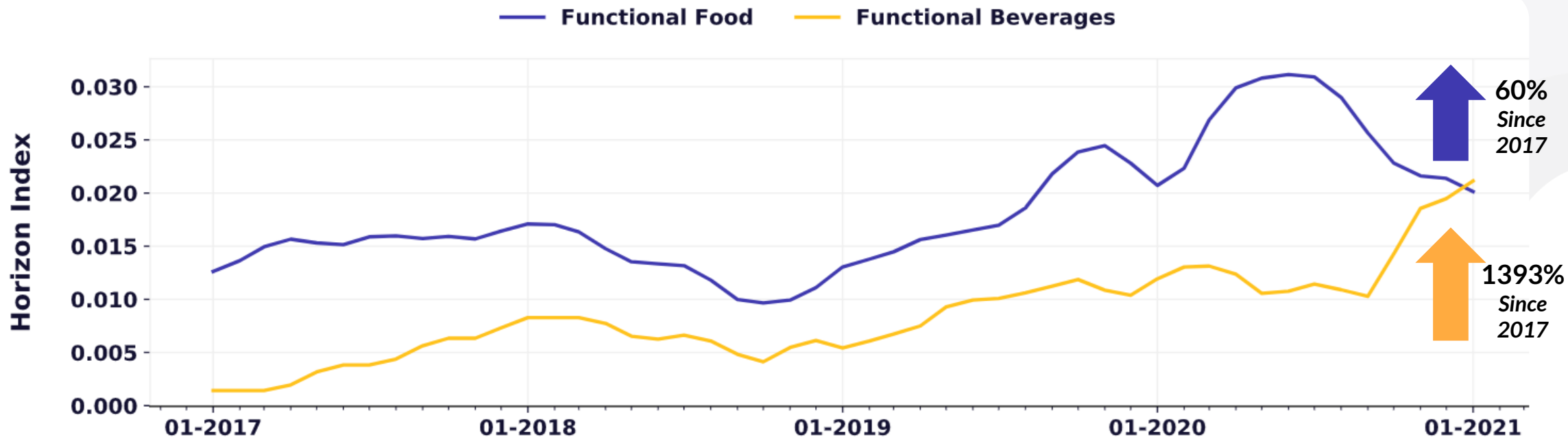
**21%**

Increase in consumer interest in food as medicine during 2020

**10%**

Social media conversations on food as medicine linked to gut health, mental health and improved sleep

# Consumer perception of functional food and beverages



## 23%

Claims related social media conversations on functional food linked to fresh and natural

## 77%

Social media conversations on functional food linked to anti-inflammatory, detoxification and antioxidant

## 15%

Social media conversations on functional food linked to gut health, skin health, mental health and improved sleep



# Core health concerns continue to remain vital...

28%

Increase in consumer interest in weight loss since 2017

27%

Increase in consumer interest in heart health since 2017

36%

Social media conversations on health linked to **weight loss**

21%

Social media conversations on health linked to **detoxification**

2%

Social media conversations on health linked to **heart health**

## Food & Beverage Launches by Health Benefit



Weight loss

15%



Improves Digestion

12%



Heart Health

6%



Blood Sugar Balance

4%

# ...but opportunities exist in emerging health areas

193%

Increase in consumer interest in gut health since 2017

124%

Increase in consumer interest in mental health since 2017

7.1%

Social media conversations on health linked to **gut health**

2.5%

Social media conversations on health linked to **skin health**

71%

Increase in consumer interest in skin health since 2017

2.1%

Social media conversations on health linked to **mental health and sleep**

<2%

Food and beverage launches associated with skin health, gut health and mental health



# Trending Functional Ingredients & Product Analytics

# Exploring the case for certain mushrooms as adaptogens

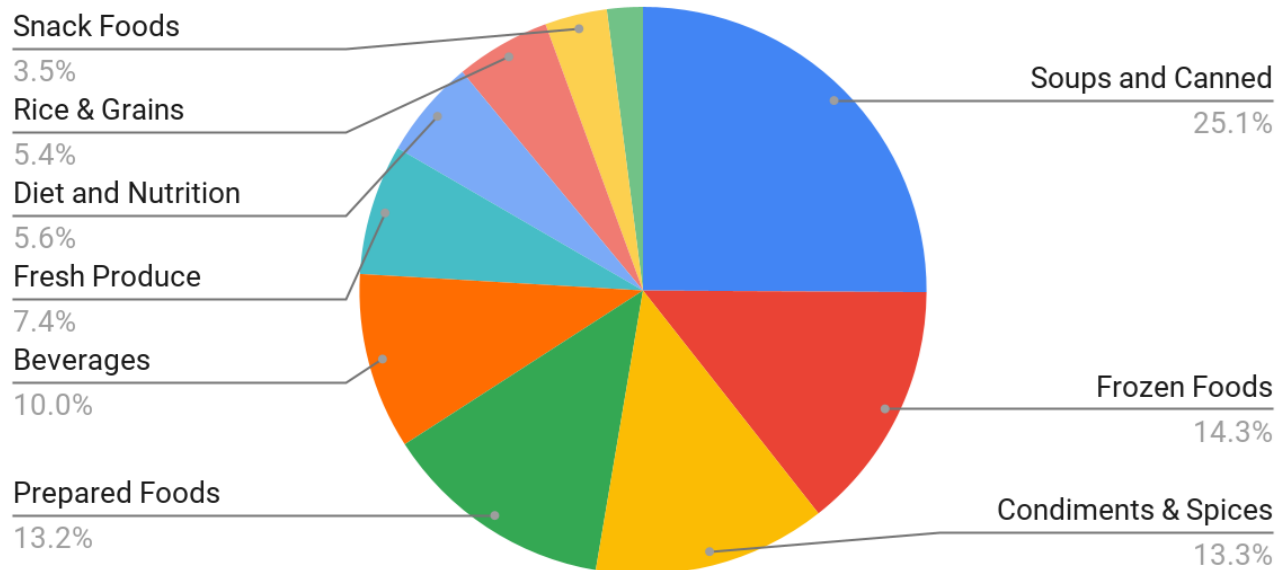
**31%**

Consumer interest in the last 24 months

**13%**

Social media conversations on functional food linked to mushroom

Distribution of mushroom by product categories



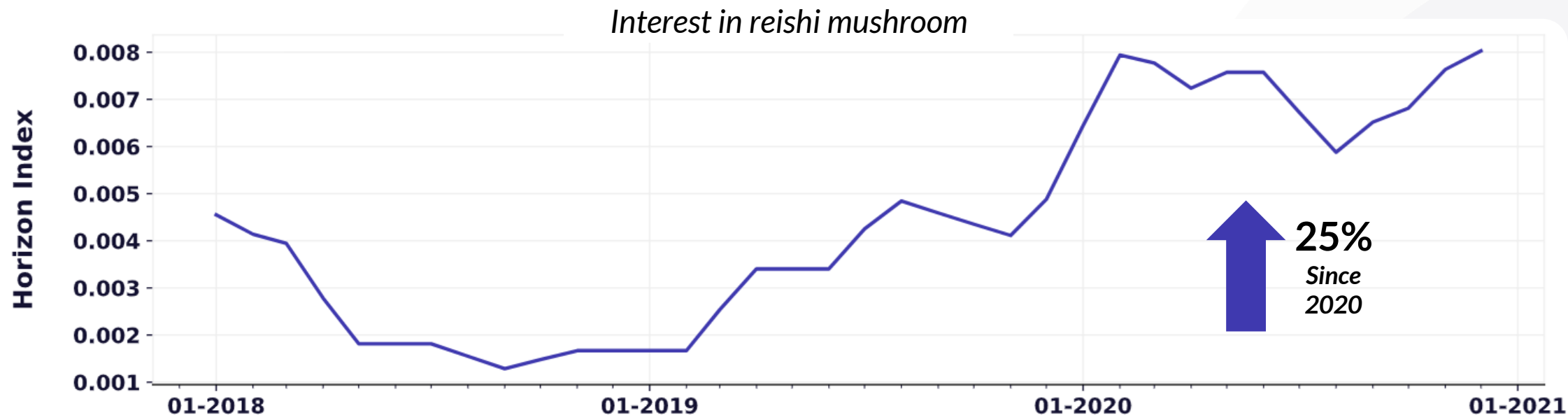
Reishi Mushroom

**73%**

Consumer interest in the last 24 months

- 1 Anxiety
- 2 Stress
- 3 Insomnia
- 4 Depression

# Reishi and mental health



**23%**

Social media conversations on reishi mushroom linked to **mental health**

**6%**

Social media conversations on reishi mushroom linked to **improved sleep**

**10%**

Claim related social media conversations on reishi mushroom linked to **adaptogens**

## Reishi Mushroom

FAMILY: Mushroom

FLAVOR: Earthy, Woody, Umami, Mushroom, Fungal

High

Novelty

6.10

Consumer

# The link with coffee

## 0.3

Penetration % in products

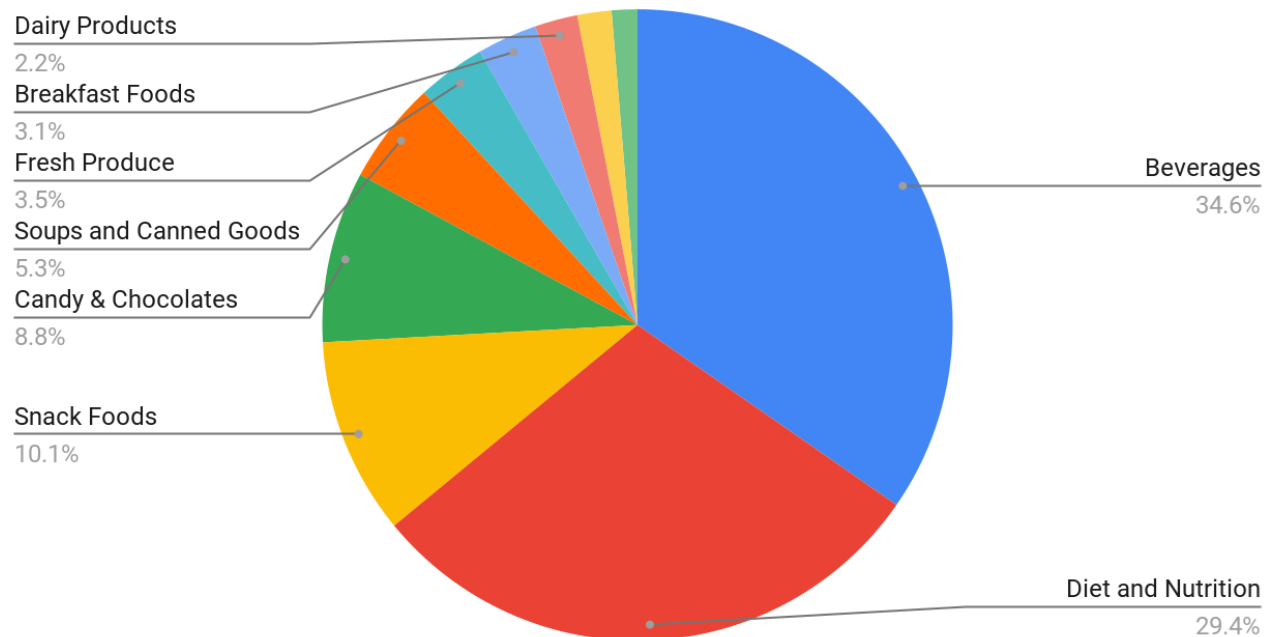
Reishi mushroom products breakdown by startup vs established brands



## 26%

Social media conversations on reishi mushroom linked to coffee

Distribution of reishi mushroom by product categories



### Reishi mushroom + Coffee powder

Low  
Novelty

Medium  
Flavor

**Key Ingredients:** Organic Arabica Coffee, Organic Reishi Mushroom, Organic Astragalus Root, Organic Elderberry Fruit



**Wildcrafter Organic Ground Coffee**

# Growing popularity of reishi in food and beverages

## Reishi mushroom + Cashew butter

High  
Novelty

High  
Flavor



### Millie Gram Vitality Nut Butter

**Key Ingredients:** Almond Butter, Cashew Butter, Honey, Sunflower Oil, Coconut Oil, Mushroom Blend (Reishi, Maitake, Shiitake), Almonds, Sesame Seeds, Almond Protein, Sunflower Lecithin, Sea Salt, Sesame Oil, Citrus Fiber, Water, Rosemary Extract

## Reishi mushroom + Mulberry

High  
Novelty

Medium  
Flavor



### Medicinal Foods Raw Turkish

**Key Ingredients:** White Mulberries, Criollo Cacao Paste, Cacao Butter & Medicinal Food Shaman's Blend, Reishi & Cordyceps, Cane Juice, Vanilla and Sea Salt

## Reishi mushroom + Rose hip

High  
Novelty

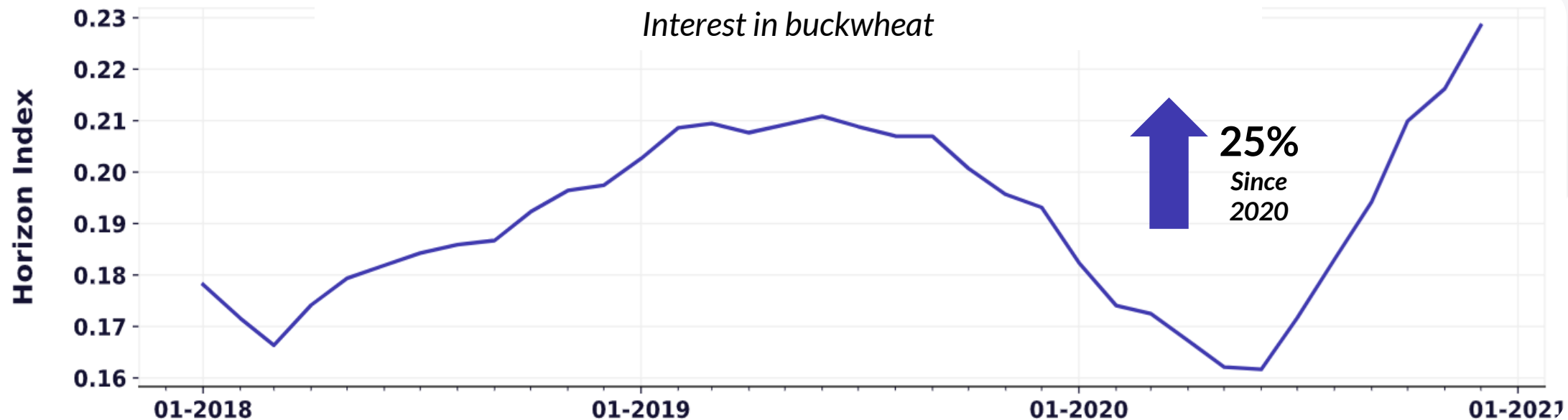
Very Low  
Flavor



### Four Sigmatic

**Key Ingredients:** 1500mg of organic reishi mushroom, tulsi, rose hips and mint

# Buckwheat and gut health



## 21%

Social media conversations on buckwheat linked to **gut health**

## 15%

Claims related social media conversations on buckwheat linked to **fiber**

### Buckwheat

Family: Generic Grain

Flavor: Bitter, Nutty, Earthy

**MEDIUM**

Novelty

**7.50**

Consumer





# The link with breakfast foods

# 0.4

Penetration % in products

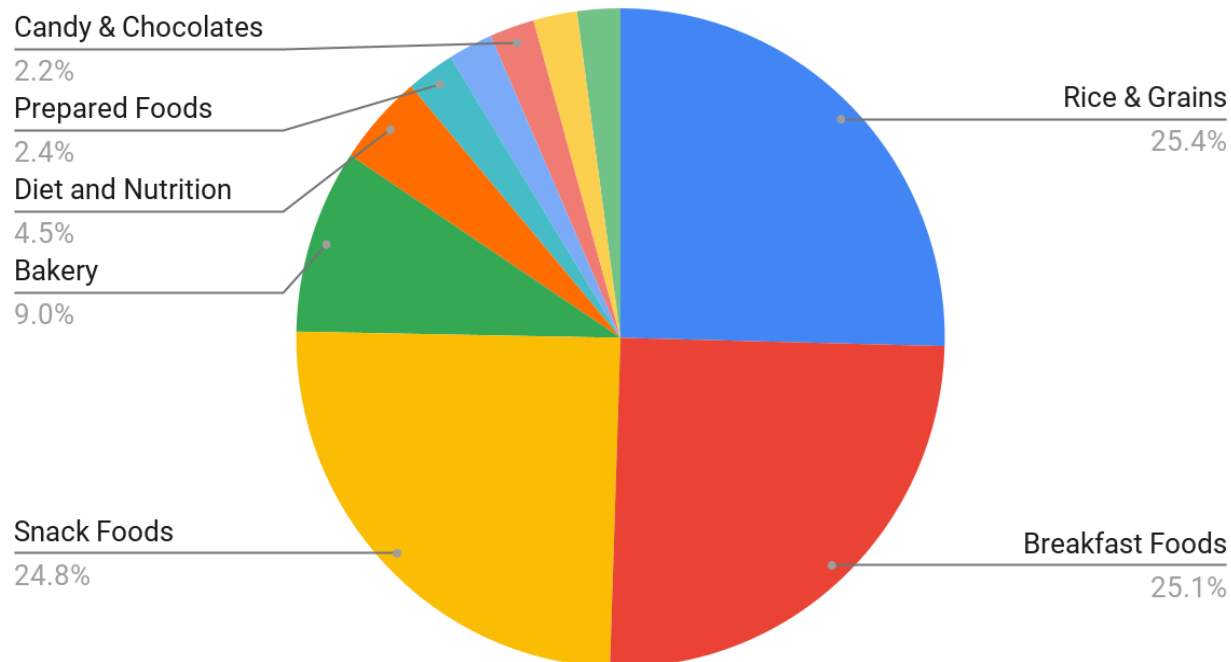
Buckwheat products breakdown by startup vs established brands



# 32%

Social media conversations on buckwheat linked to cereals and pancakes

Distribution of buckwheat by product categories



**Hodgson Mill Buckwheat Pancake Mix**

**Key Ingredients:** Whole grain buckwheat flour, whole wheat flour, baking soda

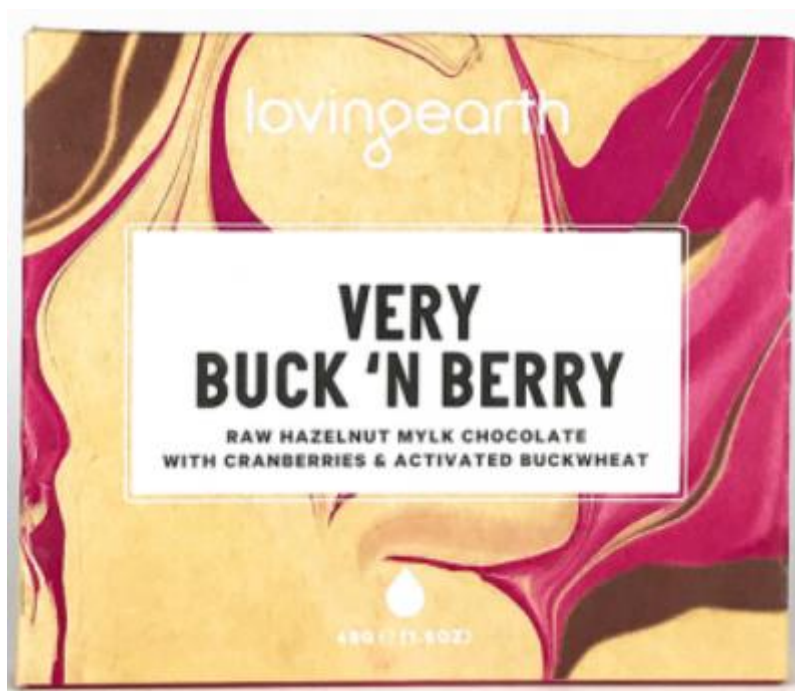


**Lil Bucks Clusterbucks**

**Key Ingredients:** Buckwheat seeds, Lemon Myrtle, Turmeric, Maple Syrup, Cinnamon, Ginger, Coconut Flakes, Pumpkin Seeds, Flaxseeds...

# Buckwheat use in novel categories

Category: Candy & Chocolates



**Loving Earth Chocolate**

**Key Ingredients:** Cacao, Creamed Hazelnut, Evaporated Coconut Nectar, Raw Activated Buckwheat..

Category: Beverages



**Yuve Drink Mix**

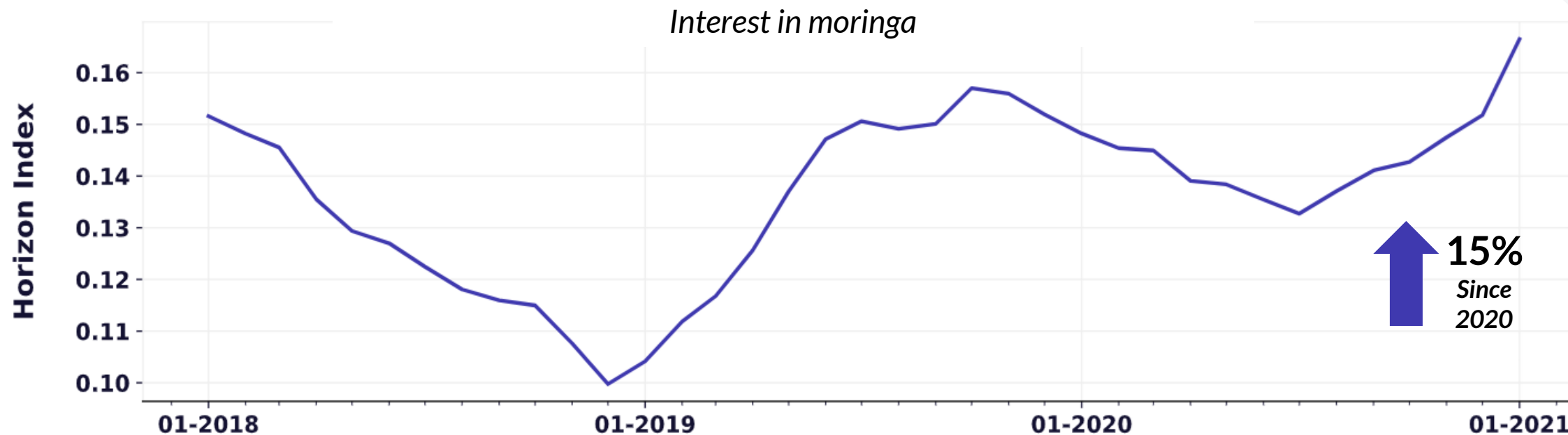
**Key Ingredients:** Digestion blend of inulin, flaxseed, organic guar gum, buckwheat sprout and protease



**Senbird Tea**

**Key Ingredient:** Organic roasted buckwheat

# Moringa and skin health



**10%**

Social media conversations on moringa linked to **skin health**

**5%**

Social media conversations on moringa linked to **antimicrobial properties**

**2%**

Claims related social media conversations on moringa linked to **vitamins**

## Moringa Powder

Family: Leafy Vegetable

Flavor: Leafy

HIGH

Novelty

6.58

Consumer

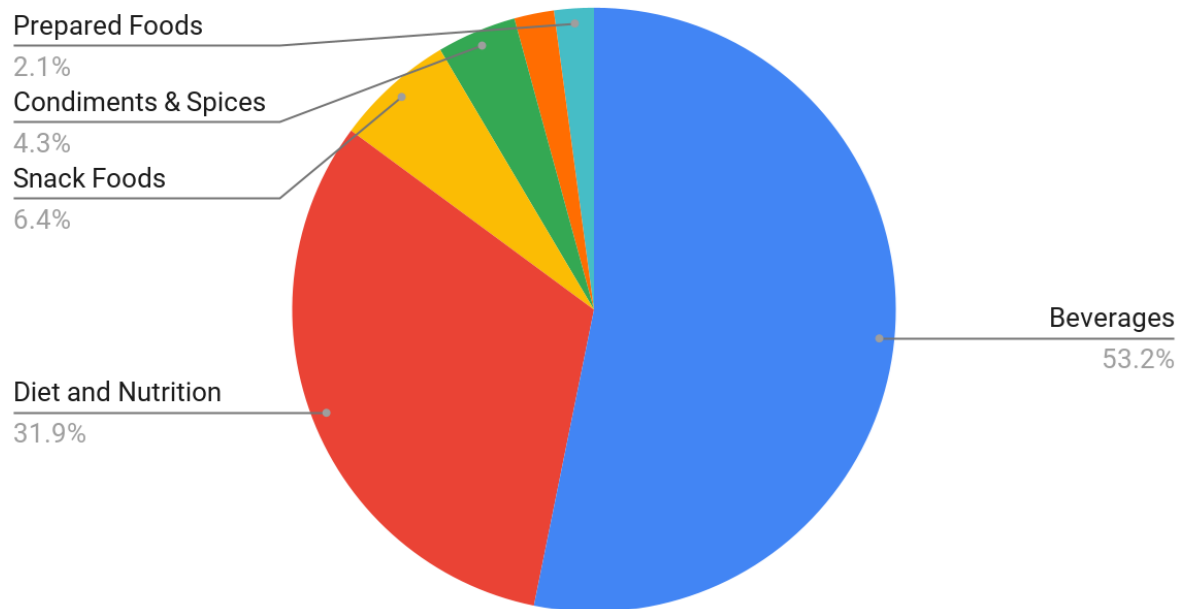


# Moringa's popularity in supplements and beverages

Moringa products breakdown by startup vs established brands



Distribution of moringa by product categories



Hollywood Secrets Moringa Leaf Powder



Simple Life Nutrition Moringa Tea

# Expanding moringa beyond core categories

## Moringa Leaves + Coconut

<b>MEDIUM</b>	<b>HIGH</b>
Novelty	Flavor



**Healthy Crunch**

**Key Ingredients:** Coconut, Coconut Milk, Maple Syrup, Coconut Flour, Japanese Matcha Tea, Moringa Powder, Vanilla Bean, Salt.

## Moringa Powder + Vanilla

<b>HIGH</b>	<b>MEDIUM</b>
Novelty	Flavor

## Moringa Leaves + Turmeric Powder

<b>HIGH</b>	<b>HIGH</b>
Novelty	Flavor



**Honey Blossom**

**Key Ingredients:** Orange blossom honey, turmeric and moringa

# Summary



**Focus on holistic wellbeing is expected to heighten consumer interest towards emerging health concerns in a post pandemic world**



**An understanding of consumer attitudes towards functional ingredients and their associated health benefits is vital for product innovation**



**Opportunities present for product extension or new product lines in categories perceived as 'indulgent'**

THANK YOU

Questions?



**SPOONSHOT®**

#foodbrain

# What's Slowing Down Product Development?



Labor-Intensive and Slow Ingredient and Item Research and Procurement



Inefficient and Manual Recipe Iteration



Data is Scattered Across Departments and Facilities



As much as 75% of Your Supply Chain Data Lives with Your Suppliers



# New Product Development & Reformulation

## Getting Started:

- ✓ Find and Source New Ingredients and Suppliers
- ✓ Qualify Suppliers
- ✓ Data Entry into System of Record
- ✓ Conduct Regulatory & Safety Checks
- ✓ Verify Label and Packaging Claims
- ✓ Compare Iterations Side-by-Side



# TraceGains Drives Product Innovation

- ✓ Unified View of Products
- ✓ Cross Department & Supplier Collaboration
- ✓ Faster Item & Ingredient Research and Procurement
- ✓ Digital Recipe Iteration
- ✓ Actionable Insight
- ✓ Automate Version Control



# Market Hub Buckwheat Search

buckwheat



All (20938) **Items (20929)** Suppliers (9)

### Refine Items Filters

Filter Clear All

Counts by  
Category [Clear](#)

#### All (20929)

- Other (2134)
- Dairy (1937)
- Flavor (1684)
- Fruit (1419)
- Food Ingredient (1041)
- Nut / Seed (907)
- Fat / Oil (896)
- Vegetable (815)

More ▾

## SimplySafe Organic Hulled Buckwheat Groats

Contact Supplier



A COA COO IQ N SDS SR PS

Bay State Milling Company - Bolingbrook, IL  
2 Locations • 66 Documents (?) • 6 Contacts

## Light Buckwheat Flour

Contact Supplier



A COA COO IQ N PS SDS SR

Skidmore Sales & Distributing, Essex Food Ingredients and Processors Choice - Harvey, ND  
1 Location • 22 Documents (?) • 10 Contacts

## IntegriPure GF buckwheat groats

Contact Supplier



A COO IQ N PS SDS SR COA

Healthy Food Ingredients - Valley City, ND

### Smart Alerts

Smart Alerts has found **32 ingredients** related to your search

**Food (21)** Dietary Supplements (11)

Honey, Monofloral **2 Warnings**


Cookies, N.E.C. **813 Warnings**

Honey **772 Warnings**

Corn Flour **73 Warnings**

Buckwheat **17 Warnings**

[View all 21 results in Food](#)



"Within the first 30 days we identified a couple sources in Market Hub for a very large project we were working on. We were able to complete a qualification activity, that would have taken anywhere from a few weeks to months, in a day or two. We're definitely seeing some quick wins from the sourcing side using Market Hub!"

– Sarah Hazaert, Supply Quality Manager Nature's Way



Nature's  
Way

# Formula Management

- Build formulas and recipes from ingredients tracked in TraceGains
- Develop new products or manage your existing portfolio
- Connect formulas to finished good specifications to dictate production

TraceGains SMC Butterhouse Inc. | Market Hub | Smart Alerts | Analytics | **Formulas** | Items | Suppliers 3 | Items Supplied | Documents | Specifications | Need Help? | Configuration | User

Formulas | Product Claims

Formulas (All) |  Show Inactive | New | Filter | Clear | Export

	Formula Name	Version	Approval Status	Version Name	Formula Updated By	Formula Updated Date	Formula Active Status	Formula Type	Primary Recipe	Formula Description
<input type="checkbox"/>	Herbal Digestion Blend	1	In Process	Initial kickoff version.	ruben.galbraith@tracegains.com	11/2/2020 2:44:36 PM	Active	Supplement	Base Recipe	testing
<input type="checkbox"/>	Pepperoni Pizza w/ Gouda Cheese	1	In Process	Standard recipe, based on other pizzas.	ruben.galbraith@tracegains.com	11/2/2020 12:36:36 PM	Active	Food	Extra Pepperoni	Also a BBQ sauce base because: why not?
<input type="checkbox"/>	Pizza Dough	1	In Process	Stock Version	ruben.galbraith@tracegains.com	11/3/2020 3:17:24 PM	Active	Food		For use in pizzas and maybe calzones.
<input type="checkbox"/>	Tomato Sauce	1	In Process	Fall 2020	ruben.galbraith@tracegains.com	10/30/2020 3:12:23 PM	Active	Food	Standard	Used in our Italian products.
<input type="checkbox"/>	Italian Lasagna	1	In Process	Authentic Style.	das@tracegains.com	10/28/2020 2:59:23 PM	Active	Food	Traditional Style	Multi-layered deliciousness.
<input type="checkbox"/>	Blood Builder	1	In Process	Legacy formulation.	ruben.galbraith@tracegains.com	10/27/2020 9:34:49 AM	Active	Supplement		Core Lineup
<input type="checkbox"/>	Essential Oil Blend	1	In Process	Original blend at launch.	ruben.galbraith@tracegains.com	10/27/2020 12:42:47 PM	Active	Supplement		
<input type="checkbox"/>	Convenience Pizza	1	In Process	Initial recipes.	ruben.galbraith@tracegains.com	11/5/2020 4:01:26 PM	Active	Food	Cheese	Convenience store.
<input type="checkbox"/>	Convenience Single Slice Pizza (Equip. & P...	1	In Process	N/A	ruben.galbraith@tracegains.com	11/1/2020 7:15:33 PM	Active	Food		Simple gear combination for this store me...
<input type="checkbox"/>	Convenience Full Pizza Pie (Equip. & Pack.)	1	In Process	N/A	ruben.galbraith@tracegains.com	11/1/2020 7:15:46 PM	Active	Food		Simple gear combination for this store me...

Page Size: 50 | 1 | 1 - 10 of 10 results in 1 pages

# Recipe Overview

- Combine ingredients and existing recipes to build out a formulation
- Calculate precise ingredient amounts to support labeling and production
- Instantly source and use new ingredients found via Market Hub

TraceGains  
SMC Butterhouse Inc.
Need Help? Configuration

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Formulas Product Claims

Version: 1- Standard recipe, Status: In Process New Version Save Audit Trail Cancel

## Extra Pepperoni - Pepperoni Pizza w/ Gouda Cheese

Primary Recipe

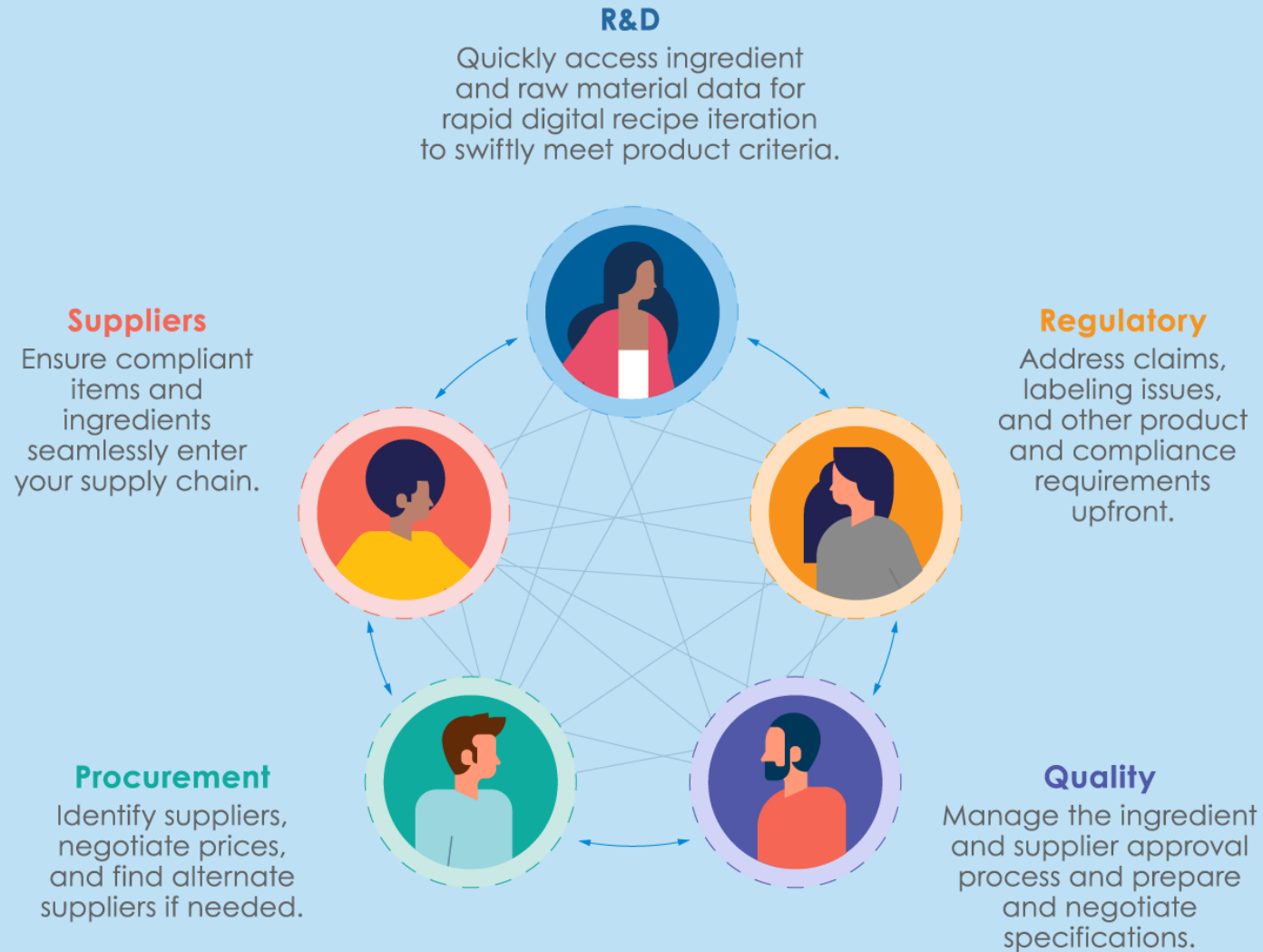
Items Nutrition Allergens Costs Other

Base Recipe: Number of Servings: 4 Serving Size: 2 Unit of Measure: g Computation Method: Amount Manage Columns

Item Name	Item ID	Find	Amount	Unit Of Measure	Overage	Gross (g)	% Total	Loss Percent	Net	% Total Net	Notes
Pepperoni	FM526		12	g	10	13.200	1.22%	5	12.540	1.19%	
Gouda Cheese	TG-GDA		10	g	10	11.000	1.02%	20	8.800	0.83%	
Spicy BBQ Sauce	BBQ01		8	g	15	9.200	0.85%	15	7.820	0.74%	
<b>Pizza Dough - Basic Wheat</b>			1000	g	5	<b>1,050.000</b>	<b>96.92%</b>	2	<b>1,029.000</b>	<b>97.24%</b>	
- Wheat Flour, Whole	W3423lka		778.910	g	5.00	817.855	--	0	801.495	--	
- Powd. Sugar 10X	61U-POP		149.790	g	5.00	157.280	--	0	154.133	--	
- Baking Yeast	09872		20.371	g	2.00	21.390	--	0	20.962	--	
- Salt	B-84202		50.929	g	5.00	53.475	--	0	52.410	--	
<b>Totals</b>			<b>1,030.000</b>			<b>1,083.400</b>	<b>100.00%</b>		<b>1,058.160</b>	<b>100.00%</b>	

%Yield: 100.00 Net: 1,058.16

# TraceGains Connects Departments with Suppliers so Teams can Work Smarter



# Live Q&A

Please fill out our survey located on the right-hand side of the console.



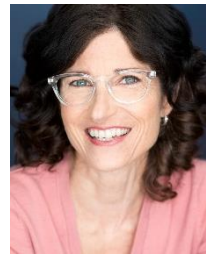
# C to C Podcast



**WHOLE FOODS MARKET**  
Walter Robb  
Former Co-CEO



**Ketchum**  
Kim Essex  
Mgr Partner



**love goodfats**  
Suzie Yorke  
CEO



**JOURNEY FOODS.IO**  
Riana Lynn  
CEO



**MATTSON**  
Barb Stuckey  
President & CIO



**CALIFIA FARMS**  
Paul Neumann  
VP of Prod. Dev.



**WellPet**  
Greg Kean  
VP of Innovation



**Honest tea**  
Barry Nalebuff  
Co-founder



**OCEAN HUGGER FOODS**  
David Benzaquen  
Co-founder



**SOUTHEASTERN pulls**  
Nick Landry  
Dev. Chef



**KETTLE CUISINE**  
Greg Grisanti  
Consultant Chef



**Pre**  
Lenny Lebovich  
Founder



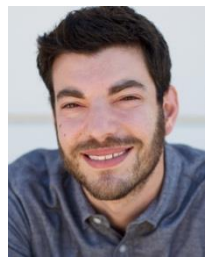
**GT'S**  
GT Dave  
CEO



**RXBAR**  
Eliana Pinilla-Ryhal  
VP Innovation



**THE BETTER MEAT CO.**  
Paul Shapiro  
Author & Co-founder



**caliper foods**  
Justin Singer  
CEO



**BOULDER BRANDS**  
Sebastian Nava  
R&D Culinary Mgr



**UNPA**  
LOREN ISRAELSEN  
President

Search 'CtoC' (no spaces) on iTunes, Stitcher, Google Play, etc.



Thank You  
Plug In. Go Faster.