

Condition Specific

*Emerging condition specific
ingredients for a health boost.*

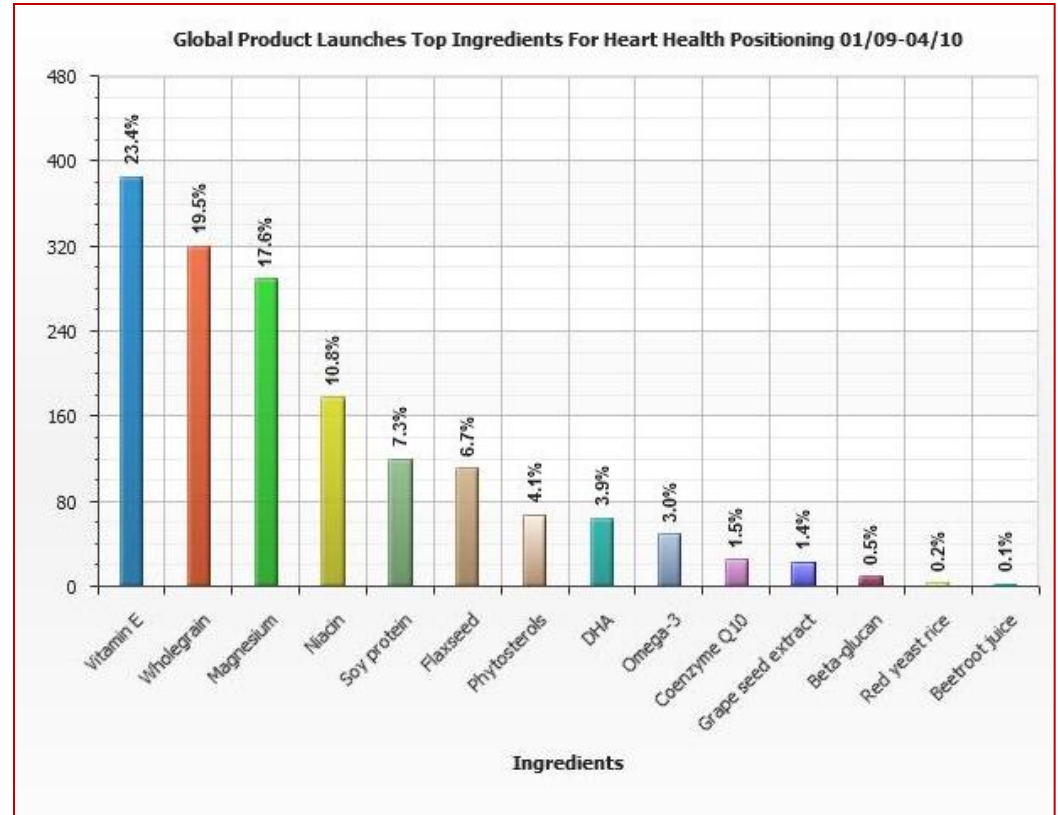
A presentation by
Innova Market Insights
at IFT Food Expo, July 2010

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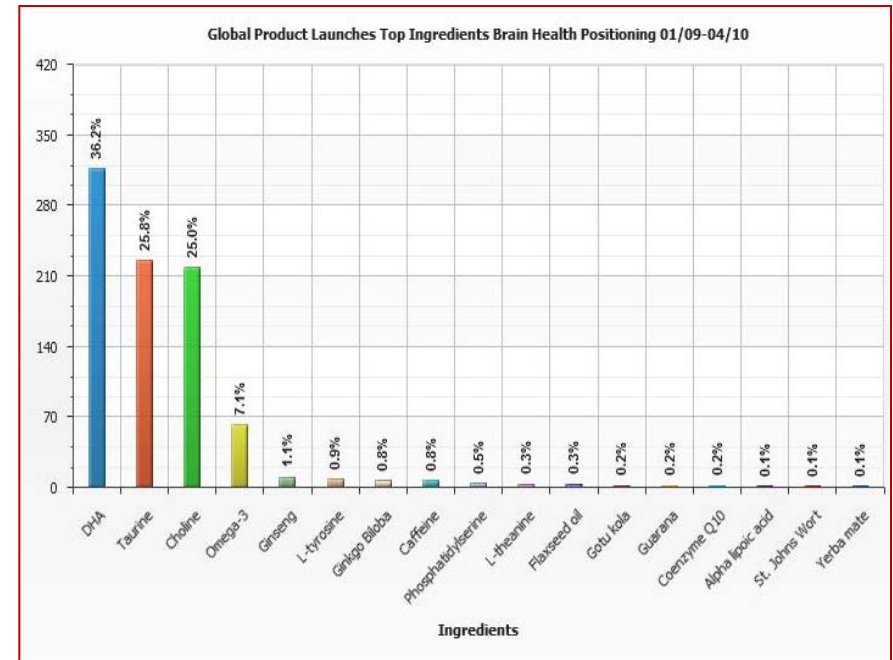
Boost for Heart Health

- An analysis of recent global nutritional product launches (Jan 09-Apr 10) in key emerging condition specific segments [heart health, brain health, bone/joint health, gut-digestive health and immunity] has found a high amount of new product activity and nutritional ingredient incorporation.
- Innova Market Insights reported in June that despite ongoing regulatory issues with regard to health claims, the positioning of food and drink products on a heart health platform appears to be continuing unabated. Data from the Innova Database shows that product launches positioned on a heart health platform have nearly tripled over the past five years and accounted for nearly 1.5% of total food and drinks launches recorded over the 12 month period to the end of April 2010, up from less than 0.7% in 2005



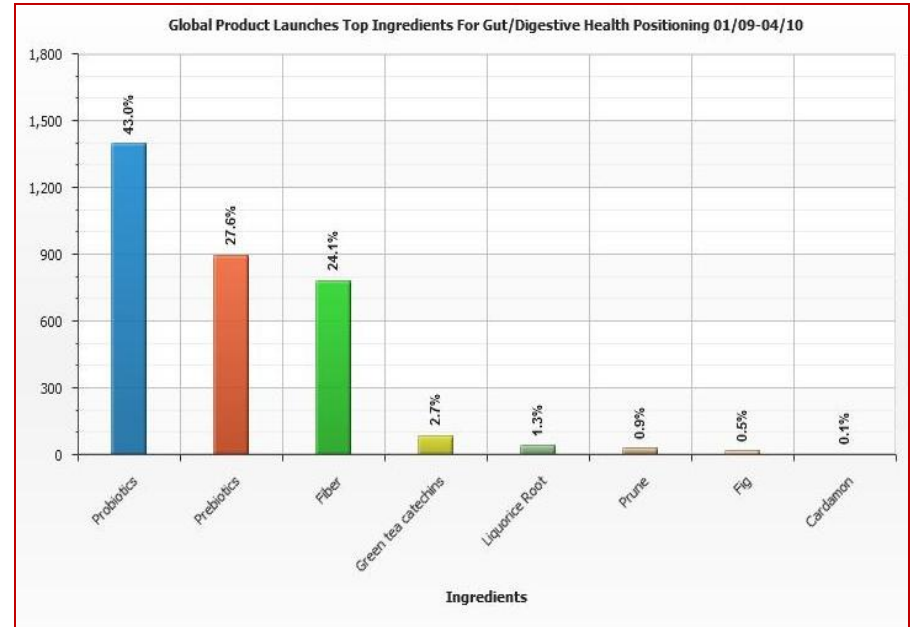
Healthy Brain Activity

- Assessing the incorporation of health ingredients into other condition specific segments (Jan 09-Apr 10) also led to interesting results. In products being positioned on a “brain health” platform, DHA (36.2%) dominated, appearing in 316 products over this period and well ahead of the more general “omega 3” (7.1%, 62 products).
- Taurine (25.8%, 225 products) and choline (25%, 218 products) were common additions to new brain health products. Despite their much touted benefits for mood and relaxation, there were few products marketed for brain health using ginseng (10) or ginkgo biloba (8) during this period.



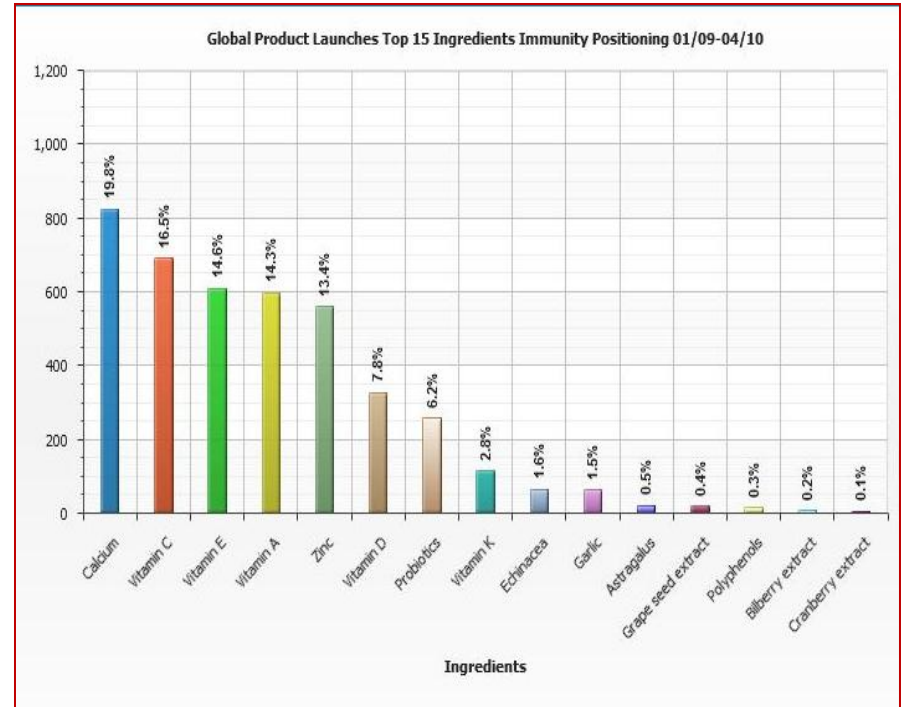
Working on Gut Feeling

- Probiotics are well established on a gut health platform and completely led the category for top ingredients for gut/digestive health, with 43% (1,396 new products) launched between January 2009 and April 2010. Impressively high are the number of products promoted for containing prebiotics (27.6%, 895), with a large number of products using a more general “fiber” claim (24.1%, 781) to take a gut/digestive health route. Green tea catechins (86), licorice root (41), prune (28) and fig (16) were also linked to gut/digestive health.
- Basic vitamins have performed well in terms of EFSA health claim assessments in Europe, with countless years of supporting research. Calcium (19.8%), vitamin C (16.5%), vitamin E (14.6%), vitamin A (14.3%), zinc (13.4%) and vitamin D (7.8%), dominated the ingredients being marketed on an immunity platform.



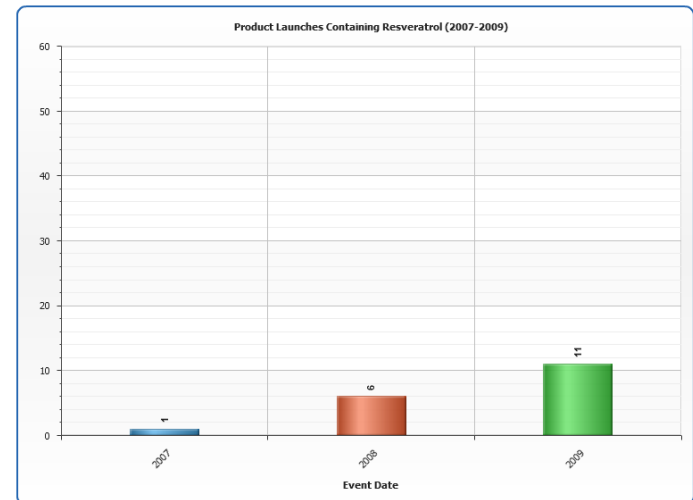
Boosting Immunity

- The ingredients sector is putting increased activity into researching the immunity potential of probiotics and health claims are present here (6.2%, 258), although at a much lower level than the 1,396 digestive/gut health claims made for probiotics over this period. Echinacea (65) and garlic (62) are also being used in immunity products, while extracts from the Astragalus family of extracts are linked to increasing longevity in claims, despite an apparent lack of supporting scientific research.



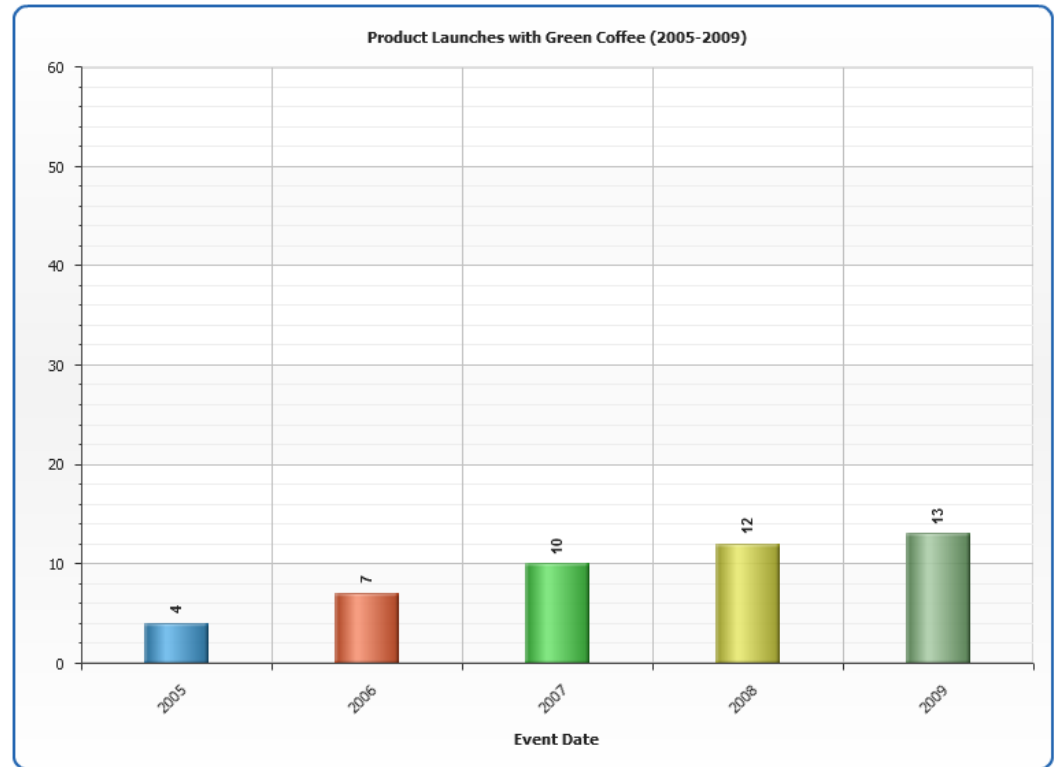
Resveratrol: Limited Product Activity to Date

- Limited product launches containing resveratrol. Confined mainly to supplements.
- Typical Claims:
 - **Chewing Gum:** One serving of resveratrol plus provides the following benefits: Anti-aging compounds, promotes significant weight loss, stimulates the SiRT1 longevity gene, reduces risk of heart attack, reduces risk of stroke, and anti-inflammatory compounds.
 - **Nutrition Bar:** Resveratrol, the ingredient in grapes acclaimed for its ability to forestall the ravages of time
 - **Juice:** 50 mg of Resveratrol , Helps: Cardiovascular health, Youthful energy and appearance, Healthy inflammatory responses

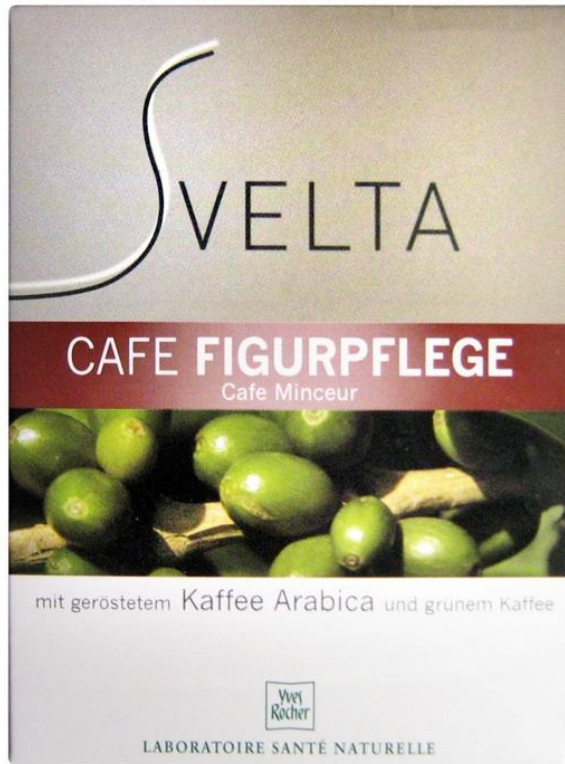


Weight Management: Green Coffee

- Weight management and nutraceutical potential for green coffee extract.
- Limited research thus far confirming its exact health benefits.



Green Coffee Extract – Product Samples



With roasted Arabica coffee and green coffee. Food supplement with coffee, plant extracts, inulin and chromium. Green coffee was selected for its fat-reducing properties.



Help in controlling cravings. Thanks to its rich in Glucogenol formula. Its a green coffee extract with satiety properties. Gluten free. GMO free. Gelatin free.

White Bean Extract – Weight Management

- Phase 2 Carb Controller is the first white bean extract shown to reduce the digestion and absorption of dietary starch in over a dozen clinical studies. It is the only weight control ingredient with two structure/function claims:
 - May help reduce the enzymatic digestion of dietary starches.
 - May assist in weight control when used in conjunction with a sensible diet and weight control program.
- Nescafe` Protect ProSlim instant coffee has been introduced in Thailand by Nestle. The product is the latest functional beverage launched in Asia containing Phase 2 Carb Controller, developed and manufactured by Pharmachem.
- There is limited research currently available for white bean extract. Limited product launches except in supplements.



Actiphaseol - mix apple pectin that reduces appetite, white bean extract that regulate carbohydrate metabolism, and carthame oil rich in CLA that burns fat

Growth Opportunity: Probiotics Emerging in Unfamiliar Categories

- Probiotics are typically found in the Dairy-related categories. Although coming from a small base, they are starting to emerge in other categories as well.
- Chilled beverages with probiotics, such as orange juice and other fruit based drinks are likely candidates to be the front runner in the next probiotic market developments. Several examples already exist on the market.
- Unfamiliar Categories for Probiotics include:
 - Chocolate
 - Juice & Juice Drinks



Increase of Osteoporosis Incidence

Projections show that in EU countries:-

- The annual number of hip fractures would be 414,000 in 2000 rising to 972,000 by the year 2050.
 - The prevalence of vertebral fractures would increase from 23.7 million in 2000 to 37.3 million in 2050.
- ✓ These figures, influenced greatly by the increasing proportion of the old in EU populations, indicate a considerable demand for health resources in coming years just from fractures caused by osteoporosis.

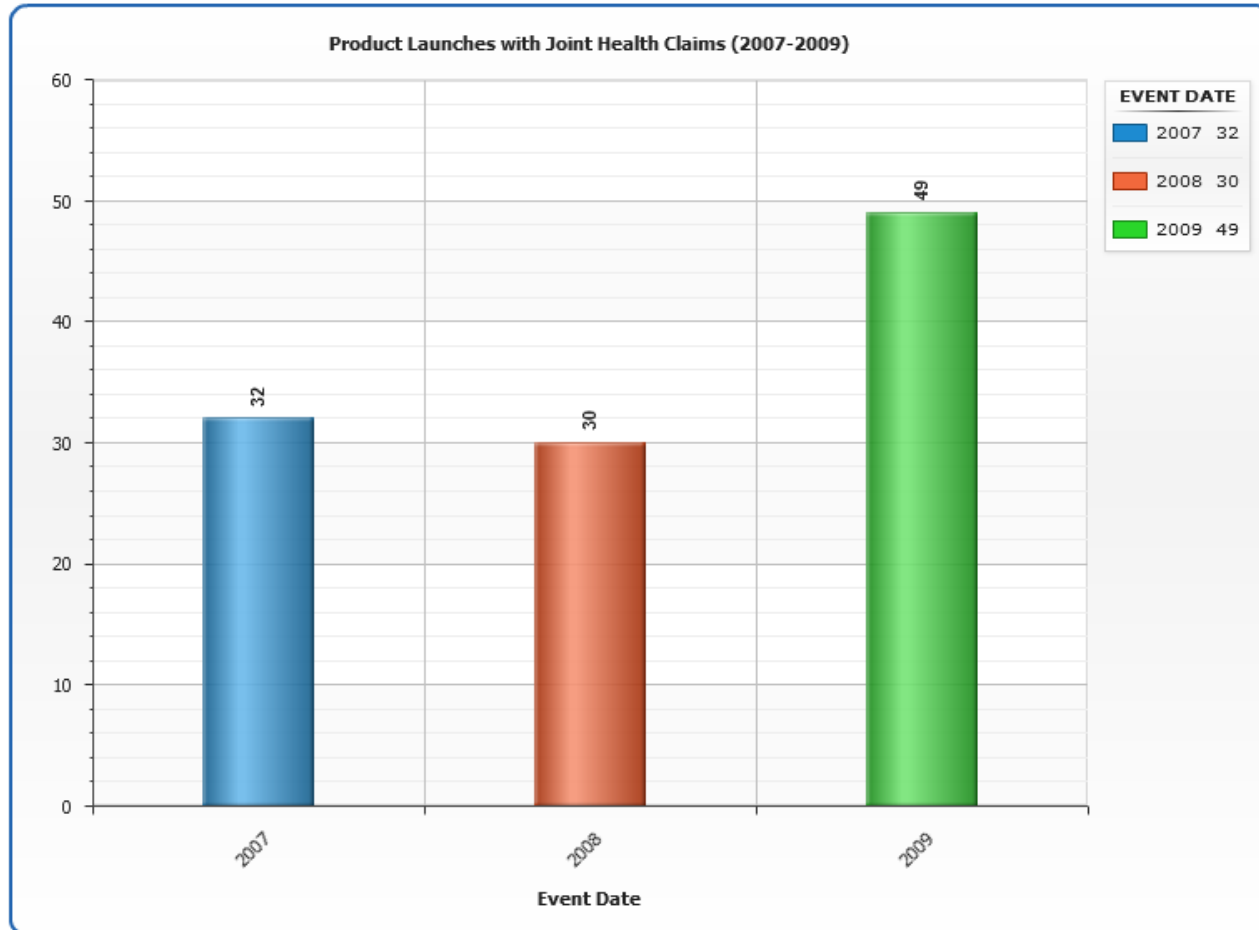
Source: <http://ec.europa.eu/>

Good for the Bones

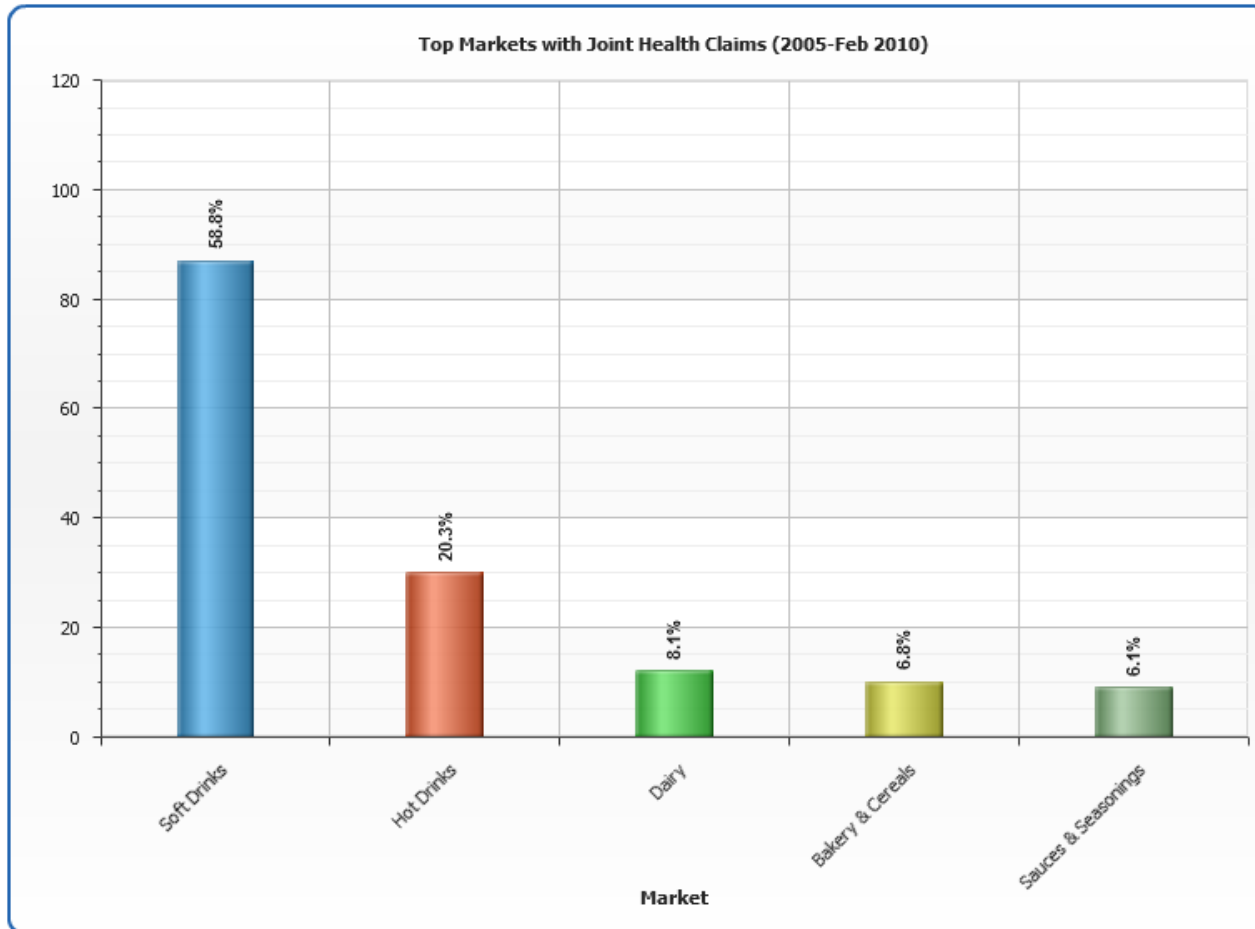
- Bone/joint health is a major emerging segment in functional foods, particularly in dairy, where consumers easily identify calcium and vitamin D with supporting bone health. Danone Densia was one of the most innovative product launches of recent months, with a concept consisting of double the calcium of a standard yogurt and vitamin D for calcium absorption.
- Unsurprisingly, calcium (46%, 535 products) and vitamin D (19%, 221 products) completely dominated the bone/joint health segment. Glucosamine (15%, 175) and chondroitin (10.1%, 118) are often used together in products positioned to benefit cartilage. Methylsulfonylmethane (MSM) (4.1%) is also being used in conjunction with these active ingredients in the joint supplements segment. Vitamin K (4%, 46) is positioned for boosting bone density.
- There were 15 new products tracked using devil's claw, a plant of the sesame family, native to South Africa which has been linked to treating arthritis and 5 using Boswellia serrata. Extracts of this herb have been clinically studied for osteoarthritis and joint function, particularly for osteoarthritis of the knee.



Joint Health: Minimal Launch Activity to Date

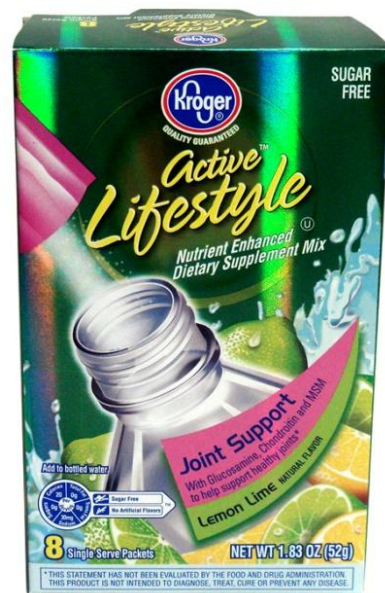


Joint Health Claims Predominantly in Soft Drinks



From Supplements to Food & Beverage Products

- Products appealing to middle-aged and older people
-Potential for significant growth: aging baby boomers.
- Many supplements for joint health, now new products emerging in drinks category containing glucosamine and/or chondroitin.



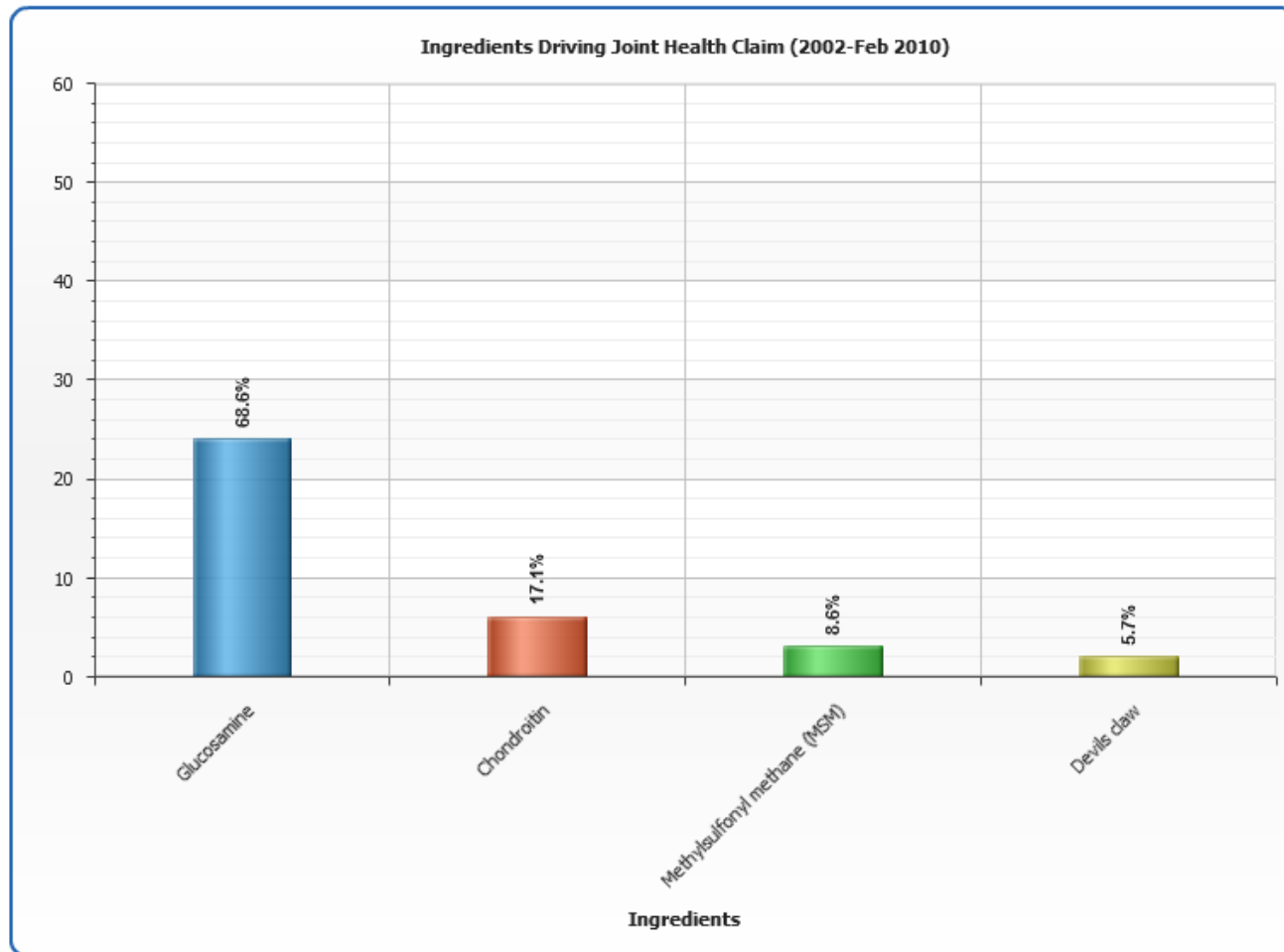
Ingredient Specific Claims for Joint Health

- Chia Oil: plant omega 3 ALA is linked to heart health, joint mobility, and hair and skin luster
- Contains triple-strength Glucosamine and Chondroitin to give joints flexibility, mobility and comfort.
- Joint+ - with glucosamine, chondroitin and omega 3
- Glucosamine HCl to help protect healthy joints
- Contains 1500mg of glucosamine and 1200mg of chondroitin



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Ingredient Driving Joint Health Claims



Connecting Joint Health with Fitness



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