Top 10 functional food trends

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Consumers are thinking carefully about the health benefits of the foods they consume. Here's a look at the factors shaping their choices and driving growth in the functional foods sector.

Pandemic-weary consumers are continuing to make health and nutrition a priority, and they're increasingly turning to functional foods and drinks for help. Nearly two-thirds of US adults say they're now more focused on their own health than they were a year ago, according to HealthFocus. Among those aged 65-plus, seven out of 10 are more health conscious.

Global sales of fortified/functional foods reached $292-billion in 2021, up from $274-billion in 2020, per Euromonitor. A Kerry survey of consumers in 16 countries found that four in 10 (42%) bought more functional foods last year than in 2020. *Nutrition Business Journal* put US functional food/drink sales at $83-billion in 2021, up 6.8% versus 2020.

Here's a breakdown of the top 10 functional food trends that are influencing consumer behaviour in 2022.

1. Self-Defense

Consumers are taking a more aggressive and preventive approach to health. More than a quarter (28%) of US adults are avid self-care consumers, according to an IRI and Klein & Co report; 41% take some daily health-promoting action.

Two-thirds of adults in the US look for food and drinks with vitamins and minerals, according to The Hartman Group's *Health & Wellness 2021: Reimagining Well-Being Amid COVID-19* report.

Mintel reports that one-quarter of US consumers currently consume functional foods and drinks to support immunity, and the Council for Responsible Nutrition says immunity is second only to general health benefits as a reason for supplement use. Citrus, dark leafy greens, superfruits, broccoli, tea, garlic, nuts, root vegetables, fish, and yogurt are the foods most associated with immunity, per Datassential.

Nearly two-thirds of global consumers link the microbiome, probiotics, and digestive health to immunity; more than half associate it with daily energy, mood, and weight management, according to HealthFocus. This suggests that the opportunity for multifunctional foods and drinks will grow.

2. Fit & Ready

The pandemic has accelerated consumers' desire to optimise physical and mental performance. Half (54%) of consumers now buy foods and beverages to improve everyday performance versus 40% who purchase products to support athletic performance, according to HealthFocus.

This emerging active lifestyle market, which is characterised by regular exercise, is projected by *Nutrition Business Journal* to grow from $43-billion in 2021 to $50-billion in 2024. Two-thirds of US adults exercise moderately or strenuously at least three days a week, HealthFocus reports.

Hydration is now the top motivation for functional food and drink purchases globally, followed by gut health, immunity, long-lasting energy, and enhanced everyday performance, Innova Market Insights found in an 11-country survey conducted in 2021.

Sales of foods and beverages with a caffeine claim grew by 25% for the year ended May 16, 2021, per IRI. SPINS data show that electrolyte supplement sales jumped 85% for the year ended Oct. 31, 2021.

Six in 10 consumers seek out protein, according to the International Food Information Council (IFIC). Consumers around the globe most often associate protein with physical energy, muscle tone, and weight management, according to HealthFocus. Digestibility and completeness are emerging protein product differentiators.

One in five supplement users (21%) used a protein supplement in 2021, according to the Council for Responsible Nutrition. More than half (58%) consumed whey protein.

Amino acid supplements are posting year-on-year growth of 34%, according to *Nutrition Business Journal*. The amino acids tryptophan, taurine, and L-theanine are moving into the functional food spotlight.

Strength training is No 4 on the list of hot global fitness trends for 2022, according to the American Academy of Sports Medicine's annual survey. Also high on the list are exercise for weight loss, fitness for older adults, and exercise as medicine.

3. Sustainably Healthy

Adding "ethical" product benefits (eg, food produced using ethical and humane production methods) that today's consumers perceive as healthful is a big idea for marketers. Products positioned in this way will appeal to health-conscious consumers. Two-thirds of younger adults feel they have eaten healthier if they have consumed ethically produced fare, per an FMI report.

Free-range, cage-free, and grass-fed meats, poultry, and eggs are considered healthier as well as more humane. Sales of organic, antibiotic-free/hormone-free, and grass-fed meat and poultry accounted for 11.4% of all meat sales, up 18.1% in 2021, FMI reports.

Four in 10 consumers believe that sustainable, wild-caught fish/seafood is healthier than other seafood and has a higher protein content. However, 29% prefer farmed fish due to its comparatively higher omega-3 content, according to FMI data.

Regenerative agriculture is very or extremely important to one in five US adults. Four in ten consumers think foods grown with a regenerative agriculture technique that improves soil health have a higher vitamin and mineral content.

Hydroponic growing is perceived to produce crops that are more nutritious, use less pesticide, and have less environmental impact, according to an FMI produce report.

Reducing waste and using byproducts are other important sustainability trends.

4. Conditions & Connections

The majority of US consumers (six in 10 households) are turning to food as a tool to manage or treat health conditions, according to Hartman data. Consumers in four in 10 households purchase beverages for that purpose. Members of US households are managing or treating 10 conditions on average, Hartman reports. Nearly three-quarters of Gen Z and millennials versus 44% of Gen X and baby boomers buy foods for specific benefits, per FMI.

Recent American Heart Association (AHA) reports underscore the fact that many risk factors for heart disease — high blood pressure, obesity, and diabetes — are increasingly associated with diseases of the brain, especially Alzheimer's and dementia, which should make heart health an even higher priority for consumers going forward.

According to the AHA, 122 million US adults have hypertension; 94 million have total cholesterol of 200 mg/dL or higher. The American Diabetes Association reports that 37 million US adults and children have diabetes, with 1.4 million new cases diagnosed annually; 114 million adults have prediabetes.

Sales of foods and beverages with an AHA heart health claim reached $3.4 billion, up 11% for the year ended Oct. 3, 2021. Consumers also are on the lookout for claims related to digestive health, low sodium, fiber content, low fat, and low cholesterol. Good Food Made Simple's Oat-Based Waffles are a delicious way to help heart health.

Along with mental health issues (see Trend 10), retaining mobility with age, followed by eye health, bone health/strength, oral health, tiredness, cancer, heart disease, and joint issues, are the conditions consumers are very or extremely concerned about, per HealthFocus. Back and neck pain, mood, and cancer are unique to the top 10 worries among those aged 18–29; hypertension and high cholesterol are big worries for those aged 65-plus.

Muscle/strength ranks fifth among the benefits consumers most want from foods/drinks, per IFIC. The WHO now recognises sarcopenia as a preventable disease that is reversible through nutrition and exercise.

One in five consumers buys functional foods and drinks for their anti-inflammatory benefits; metabolic health is another emerging benefit consumers want from foods, according to Mintel.

Antioxidants, green tea, electrolytes, superfruits, and fibre/prebiotics are the most sought-after ingredients for functional beverages, according to the Hartman wellness report.

5. Weighing In

Weight loss once again tops the list of benefits consumers most want to get from food, according to IFIC.

Forty-five percent of consumers Ipsos surveyed in 30 countries say they are trying to lose weight. Over half (56%) of US households have a member who is trying to do so; one-quarter of consumers view weight loss as an urgent matter, per Hartman. According to 2022 AHA statistics, 42% of U.S. adults and 19% of children aged 2 to 19 are obese.

Weight loss products were the tenth fastest-growing CPG product category in multi-outlet and convenience channels during the first half of 2021, per IRI. Research and Markets projects that the global market for weight loss products and services will climb from $255-

billion in 2021 to $377-billion by 2026. China will be one of the fastest-growing markets.

Sales of center-store foods and drinks touting a no-/low-carb claim grew 48% for the two years ended May 16, 2021, per IRI. Sales of products with a keto or Whole30 claim were each up 16%, and sales of products with high protein/Atkins Diet claims grew by 15%.

In 2021, half (48%) of all consumers and two-thirds of Gen Zers and millennials tried a specific eating approach. Plant-based, low-carb, and dairy-free/lactose-free were each tried by 10%; intermittent fasting, 9%; whole foods, Mediterranean, and gluten-free, 8%; Weight Watchers, 7%; keto, DASH, glycemic index diets, 5%; and FODMAP, 4%, according to an FMI report.

6. The Plant-Based Protein Plateau

High prices, concerns about over-processing, and a rising demand for natural, whole food alternatives, along with emerging negative perceptions of plant-based protein's impact on the environment, may well realign the plant-based segment. Consumer avoidance of plant-based protein has doubled since 2019, up to 14%, according to Hartman.

Earlier this year, Maple Leaf Foods, owner of the Lightlife and Field Roast brands, announced it will curtail further expansion into the alternative meat category as a result of sales declines. Beyond Meat reported a downturn in fourth-quarter US sales.

While plant-based meat alternatives posted significant gains in 2019 and 2020, by midyear 2021, IRI/210 Analytics reported that trial, repeat purchases, and sales had leveled off. Buoyed by increased gains in frozen/processed plant-based poultry, dollar sales squeaked up a mere 0.9% for the 12 weeks ended De. 26, 2021, versus a year ago, while unit sales fell 5.7%. Sales of plant-based cheese also dropped, per IRI.

At midyear 2021, per IRI, plant-based meat alternatives had a US household penetration of 8.1%. IRI projects that, ultimately, plant-based meat alternatives will be a "nice niche," similar to organic and grass-fed meat. Currently, two in five US adults consume plant-based foods/beverages intended to mimic animal products daily or weekly, IFIC reports.

Half of plant-based consumers are interested in using more nuts/seeds as a protein source; 43%, more legumes; 42%, more grains; and 16%, more tofu/tempeh, according to HealthFocus.

Plant-based milks are performing very well; oat milk is now second only to almond milk in sales, per IRI. True nutritional parity for animal product alternatives is essential, especially for companies interested in entering the children's food market.

Energy, weight management, and heart health are among the reasons consumers cite for opting for plant-based fare, according to HealthFocus. Some worry that a plant-based meal won't supply adequate protein, or they'll feel hungry after eating it, so addressing such concerns is an important marketing strategy to help encourage consumption of plant-based food, according to Datassential.

7. Alternatively Clean

Consumers are increasingly seeking out food/beverage formulations that help them avoid unwanted ingredients, ensure minimal processing, and protect against real or perceived allergens, FMI reports. Ingredients are the first information shoppers look for on the label when they are buying a new food or drink.

More than half of consumers are extremely concerned about avoiding pesticides, per HealthFocus. Other top concerns include growth hormones/antibiotics, high fructose corn syrup, and artificial sweeteners.

Six in 10 consumers watch for products that are non-GMO verified. One-third buy organic to avoid GMOs, says Hartman. In addition, one in five shoppers is extremely or very concerned about the gluten content of food. SPINS reports that across all outlets, sales of organic foods and drinks that are also labeled gluten-free grew by 16% for the year ended Oct. 3, 2021.

Food Allergy Research & Education experts estimate that 32 million Americans have food allergies; that’s 11% of US adults and nearly 8% of children. So it’s not surprising that IFIC found that one in five consumers cite the presence of allergens among their top food safety issues.

8. Functional Cooking

With nearly half of US consumers cooking more meals at home than they did a year ago, products, ingredients, and recipes that make healthy food preparation easier are in demand, according to FMI.

Mintel reports that four in 10 consumers in Germany, France, Italy, and Spain want more recipes tailored to specific health benefits, such as weight loss or lowering cholesterol.

Claims related to real ingredients, kosher, fresh frozen, 100% natural, and no antibiotics/no hormones are driving frozen food sales, according to the American Frozen Food Institute. Seven in 10 users want more entrées that prominently feature fruits and vegetables; more than half seek more vegetarian entrées and veggie-based carb alternatives. Interest in blended meat/vegetable items outpaces interest in meat alternatives (52% versus 43%), according to the American Frozen Food Institute.

Consumers view Mediterranean and Japanese cuisines as the healthiest, according to Datassential.

9. Mainstream Niches

Functional foods are starting to mainstream onto restaurant menus. American Culinary Federation (ACF) chefs surveyed by the National Restaurant Association put immunity-boosting snacks at No 5 on the list of top culinary trends for 2022. Immune-boosting and functional ingredients came in seventh on the list, plant-based sandwiches were eighth, and alternative sweeteners were tenth.

Nut milks topped the list of trendy nonalcoholic beverages for 2022; CBD-infused drinks were third, per the ACF chefs. Reduced-sugar menu items ranked third in the snack category. Plant-based sandwiches/burgers were the top 2022 dinner and lunch trend.

According to Datassential, CBD mentions on menus have grown by 1,248% over the past four years; MCT oil mentions were up by 699%; collagen, +349%; bone broth, +274%; lion's mane mushrooms, +249%; turmeric, +129%; and raw honey, +112%.

Innova Market Insights reports that 17% of all global new food and beverage launches with functional ingredients were for babies and toddlers last year.

Pet owners seek functional benefits for their canine and feline family members. Formulations that are grain-free, high in protein, and vitamin fortified drove pet food sales growth for the year ended May 16, 2021, per IRI. Sales of pet supplements are fast approaching $1-billion, according to Packaged Facts; CBD pet supplements alone have reached $100-million.

For dogs, supplements to promote mobility/joint function, healthy skin or coat, immunity, dental health, heart health, stress/anxiety reduction, and digestion are the most frequently purchased. For cats, the leading supplements are for joint, skin, and immunity benefits.

10. Inside Out

The COVID-19 pandemic put mental and emotional health issues in the spotlight. In more than half of US households (53%), treating or trying to prevent anxiety or stress is a concern, according to Hartman; depression is an issue in 44% of households. HealthFocus reports that mood swings and irritability are emerging problems among those aged 18–29.

In addition, four in 10 US consumers are actively working to manage their cognitive health, according to Hartman research. Retaining mental sharpness with aging is second only to COVID-19 among the health concerns Americans are extremely or very concerned about, Hartman says. Also among the top concerns, according to HealthFocus, are memory, stress, tiredness/lack of energy, and lack of mental sharpness/focus.

A quarter of consumers turn to functional foods for their calming/relaxation benefits, Mintel reports. Kerry research shows that cherry blossom, elderflower, jasmine, and vanilla are associated with feelings of peacefulness.

For the year ending Oct. 31, 2021, SPINS reports that sales of ashwagandha supplements shot up by 166%; other strong performers include nootropics, adaptogens, and melatonin. CBD supplements sales fell by 31%. Melatonin, magnesium, lavender, and valerian are among the most popular sleep supplements.

Liver, kidney, eye, and respiratory/lung health are among the conditions getting increased attention as consumers continue to embrace the value of detoxification and seek to combat the negative effects of pollution. Two-thirds say a healthy environment is extremely or very important to their overall health, according to HealthFocus.

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