Supply and Demand Trends in the Global Superfruits Market

International Symposium on Superfruits: Myth or Truth?
July 2013

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The source of today’s information

**R&D**: science, patents, technology, formulation, ingredients, regulation

**Marketing**: products, trends, consumer insights, category monitoring, news, trends
Strategic location in the Food Valley in The Netherlands
Global overview
Growth path for ‘superfruit’ product launches

Fruits included in search: Acai, yumberry, aamla, blackberry, black currant, raspberry, bilberry, blueberry, strawberry, maqui berry, baobab, elderberry, lingonberry, seabuckthorn, cranberry, grape, guarana, mangosteen, noni, pomegranate, wolfberry, goji, acerola, camu camu.

Tracked product launches with selected fruits doubled from 2008 to 2012.

Innova Market Insights
Superfruit as marketing term

• Chart below shows only those ‘Superfruit’ product launches tracked with the “Superfruit” term stated on the product packaging.
Superfruits and health positioning

- The percentage of tracked (selected) superfruit product launches with an active health positioning declined from 20% to 16% in over the shown period.

**Active health positioning:**
Heath positioning or claims - tracked in claims or descriptions – regarding the addition of an ingredient with specific health benefits.
Recent trend: forty is the new twenty

- Consumers’ desire to maintain active lifestyles and start to make conscious food consumption decisions to age ‘successfully’.


Fruity beauty drink for supporting your skin health with valuable vitamins and minerals, in a 250ml aluminum bottle. Claims: Anti-aging, Skin care, collagen production. Made from fruit nectar. Ingredients: Water, multi fruit juice from concentrates (blackcurrant, red grapes, cherry, cranberry, acai, pomegranate, chokeberry), pholyphenol containing vegetable extracts (green tea, white tea, apple, red grapes), provitamin A, vitamins (vitamin B1, vitamin B2, vitamin B3, vitamin B6, vitamin B12, vitamin C, vitamin E); folic acid, calcium panthotenate, biotin, zinc gluconate, sodium selenite, copper gluconate, potassium iodide, sucralose.
Hero aims the ‘new’ twenty-five+ women

Hero lanceert krachtfruit

BREDA - Hero lanceert Krachtfruit, een dagelijkse gezonde oppepper voor vrouwen van 45+.

Hero Krachtfruit is een vruchtendrank gericht op de ‘rijpere vrouw’. Volgens Saskia van Dijk, senior trade marketeer bij Hero, ligt daar een markt voor een specifiek product. ‘We weten uit kwalitatief onderzoek dat de menopauze impact heeft op vrouwen, maar geen enkele vrouw wil zich oud voelen of hierop worden aangesproken. Ze willen zich toch niet zomaar in het hokje 45+ laten zetten. Ze willen zich vrouwelijk en sterk voelen en zijn juist op zoek naar producten die hen hierbij kunnen helpen. Hero wil die twee elementen ‘sterk’ en ‘vrouwelijk’ dan ook samenbrengen in Krachtfruit. Ofwel een combinatie van kracht en elegantie.’


Hero offers this 45+ superdrink in two flavors: Guarana and Royal Jelly.

Netherlands: Hero KrachtFruit
A natural, tasty fruit mix with several natural ingredients and minerals, without preservatives or added sugar. A daily boost for 45+ women. Claims: Pure and unsweetened. Natural energy.

Source: Distrifood, week 22, 2012
Products that are grounded in science

- EFSA approval boosted introductions with Vitamin C + Immune Health claim

EFSA Accepted Claim (Oct, 2010): Vitamin C and Maintenance of the normal function of the immune system

Regulations can be an opportunity too!
Actimel: repositioned from probiotics to vitamin C
Antioxidants

- Within the juice category, 7.5% of the products with a health claim carry the antioxidant claim.

**USA: Amway Nutrilite Berry Flavored Antioxidant Juice.**

Acai
Acai: On its return?

- Tracked launches indicate maturation of acai as a superfruit; 20% decline in 2011 but 19% growth in 2012
Can superfruits ‘save’ the energy drink category?
Acai-infused energy drinks

AÇAÍ - THE NATURAL ENERGY WONDER

28BLACK is based on the Brazilian acai berry. Acai is a fruit from the tropical Amazon regions. Surfers initially discovered its energetic effect and brought the berry to the cities. While in the US and South America acai has been celebrated as a true superfood for quite some time, the rest of the world is only about to discover it.

Germany: Calidris 28 Black & 28 White:
Lightly carbonated, all-natural and does not include taurine, artificial flavors or preservatives. 28Black contains Q10, vitamins B6 and B12, guarana and isomaltulose, a natural form of sugar that is found in honey and sugar cane, the company says. 28White is a zero-calorie, sugar-free, stevia-sweetened version of 28Black.
BAZI: Super fruited energy drink

BAZI VS

ENERGY DRINKS FORGOT NUTRITION. BAZI DIDN’T.

BAZI IS THE ONLY ENERGY SHOT THAT PROVIDES MORE THAN JUST ENERGY.

SUPPLEMENT FACTS
SERVING SIZE: 1 BOTTLE [2 FL. OZ.]
SERVING PER CONTAINER: 1

<table>
<thead>
<tr>
<th>Amount Per Serving</th>
<th>AMT/SVG</th>
<th>%DV*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calories</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Total Carbohydrate</td>
<td>11 g</td>
<td>4%</td>
</tr>
<tr>
<td>Sugar</td>
<td>6 g</td>
<td></td>
</tr>
<tr>
<td>Vitamin A (as Palmitate)</td>
<td>2500 IU</td>
<td>50%</td>
</tr>
<tr>
<td>Vitamin C (as ascorbic acid)</td>
<td>270 mg</td>
<td>450%</td>
</tr>
<tr>
<td>Vitamin D (as Cholecalciferol)</td>
<td>800 IU</td>
<td>200%</td>
</tr>
<tr>
<td>Vitamin E (as d-alpha tocopheryl acetate)</td>
<td>120 IU</td>
<td>400%</td>
</tr>
<tr>
<td>Thiamin (thiamin HCl)</td>
<td>1 mg</td>
<td>70%</td>
</tr>
<tr>
<td>Niacin (nicotinamide)</td>
<td>12.5 mg</td>
<td>60%</td>
</tr>
<tr>
<td>Vitamin B6 (as pyridoxine HCl)</td>
<td>1.5 mg</td>
<td>80%</td>
</tr>
<tr>
<td>Folate (as folic acid)</td>
<td>800 mcg</td>
<td>200%</td>
</tr>
<tr>
<td>Vitamin B12 (as cyanocobalamin)</td>
<td>5 mcg</td>
<td>50%</td>
</tr>
<tr>
<td>Biotin (as d-Biotin)</td>
<td>600 mcg</td>
<td>200%</td>
</tr>
<tr>
<td>Pantothenic Acid (as calcium d-pantothenate)</td>
<td>5 mg</td>
<td>50%</td>
</tr>
<tr>
<td>Inosine D - Ribose</td>
<td>1500 mg</td>
<td>**</td>
</tr>
<tr>
<td>Caffeine</td>
<td>80 mg</td>
<td>**</td>
</tr>
<tr>
<td>Goji Berry® is a unique, proprietary blend of wild blueberry, strawberry, cranberry, wild bilberry, elderberry and raspberry extracts.</td>
<td>50 mg</td>
<td>**</td>
</tr>
<tr>
<td>Grape Seed Extract</td>
<td>10 mg</td>
<td>**</td>
</tr>
<tr>
<td>BAZI Proprietary Superfruit Blend</td>
<td>12 g</td>
<td>**</td>
</tr>
</tbody>
</table>

*Daily value based on 2000 calorie diet. **% daily value not established.
Other ingredients: water, organic cane sugar, natural flavors, citric acid.

www.innovadatabase.com
Blueberry
Blueberry: growing steadily

• In contrast with Acai, the number of tracked blueberry launches is steadily increasing.

Global product launches tracked with blueberry increased by 16% per year from 2010 to 2012.
Blueberry flavored drinks

France: Red Bull The Blue Edition Energy Drink: Blueberry
Description: Blueberry flavored energy drink in an aluminum can. Claims: High caffeine content. Made with pure water from Alps. With taurine. Not suitable during pregnancy. Carbonated water, saccharose, glucose, acidity regulator (sodium citrates, magnesium carbonate), acids (citric acid), taurine 0.4%, caffeine 0.03%, glucuronolactone, inositol, vitamins (niacin, pantothenic acid, vitamin B6, vitamin B12), flavorings, colorings: riboflavin, brilliant blue FCF), food coloring: carrot concentrate, hibiscus.

UK: Ocean Spray 100% Juice Blueberry Blend with Added Vitamin C & E
A blend of apple, grape, blueberry and pomegranate flavored juice, with added vitamin C and vitamin E. Claims: a 250 ml serving provides 1 of your 5 a day and 100% of your RDA of vitamin C and vitamin E. With no added sugar. With added vitamin C and vitamin E. 100% juice. No artificial colors or flavors. No preservatives. Contains naturally occurring sugars. No sweeteners.

Czech Republic: Arizona Blueberry White Tea
Description: White tea with blueberry, in a glass bottle. Claims : With antioxidants. Ingredients: Water, sugar, pear juice from concentrate 4%, blueberry juice from concentrate 1%, honey, natural flavor, white tea extract 0.06%, citric acid, ascorbic acid.
Premium blueberry desserts

United States: Ben & Jerrys Greek Frozen Yogurt: Blueberry Vanilla Graham
Description: Blueberry and vanilla frozen yogurts with a graham cracker swirl, in a 473ml cardboard cup.
Claims: Loaded with all the flavor boldness you’d expect, this creative concoction will release your inner Greek. It’s the most epic frozen yogurt yet! So get your Greek on and give it a try. We think it’ll rock your acropolis. Enjoy!

South Korea: Yakult Super 100 Premium Blueberry Flavored Yogurt
Description: Four plastic cups of blueberry flavored yogurt in a cardboard sleeve. Claims Features: With 6% blueberry added. Premium. Ingredients: milk 33%, water, blueberry jam 20%(sugar, frozen blueberry, amidated pectin, polygum, citric acid, calcium phosphate, blueberry flavoring), milk protein mixed powdered skim milk, sys53 mixed formulation(modified starch, amidated pectin, dextrose, sunflower oil), lactic acid bacteria (thermophilus, l. acidophilus, l. casei, l. curvatus, bifidobacteria).
Media attention and influence

25 Superfoods to Incorporate Into Your Diet Now

Discover the ingredients that will keep every part of you healthy—including your appetite.
By Celia Barbour and Rachel Mount

Blueberries
Fresh or frozen, blueberries have sky-high levels of antioxidants, which combat the damage done by inflammation. Anthocyanins, the natural plant compounds that give blueberries their deep color, may have antidiabetic effects as well. And new research suggests blueberries might protect the heart muscle from damage.

Try these recipes: Frozen Yogurt Sundae with Spiced Nuts, O's blueberry menu
Pomegranate
Pomegranate: Slowing or declining?

- After years of growth, pomegranate launches declined by 11.2% from 2010 to 2011. It stabilized in 2012.
POM Wonderful: The brand that made pomegranate

- The brand that made pomegranate was launched in 2002, when just 12% of Americans knew about pomegranate.

  - Marketing efforts:
    - 1st step: win Hollywood and NYC tastemakers
    - Marketers put POM in gift bags at fashion shows
    - Product placement (e.g. Desperate Housewives)

  - Investment in research to document health benefits

  - The result: sales reached $165M in 5 years
Marketing pomegranate

**Canada (2009): POMx Light Tea Pomegranate Wildberry White tea**
Description: Antioxidant super tea with pomegranate and wildberry flavor, in a plastic bottle. Claims: POMx has more antioxidant potency than red wine, green tea, grape and acai extracts. In fact, 15 published scientific studies on POMx have documented its antioxidant superiority as well as its promising health benefits. Remember: Only one tea contains POMx. Which is why it's now in POMx name. Natural product.

**USA (2010): POMx Antioxidant Recovery Supplement (473ml)**
Description: [...] Designed for super athletes. Claims: Speeds muscle recovery. POM reduced post-exercise strength loss by more than 30% compared to a placebo. Reduces muscle soreness. POM reduced post-exercise soreness by 28% compared to a placebo.

**Netherlands (2010): Pom Wonderful 100% Pomegranate Blueberry Juice**
Description: 100% California pomegranate and blueberry juice drink in a plastic bottle. Ingredients: Pomegranate juice (86%) and blueberry juice (14%) from concentrate.

**USA (2010): POMx Bar Antioxidant Superbar: Pomegranate/Yogurt**
Description: Made with real POM Wonderful pomegranate arils, natural almonds, cashews, and dipped in creamy yogurt. Claims: Unwrap the power of antioxidants. Made with real fruit and nuts, this all natural bar is powered by POMx and has the antioxidant strength of one whole pomegranate. Gluten free.
Recent pomegranate product launches
Case: Evolution Fresh
Evolution Fresh: Will it boost superfruit popularity?

- Starbucks moves into the growing juices category
- Evolution Fresh will serve healthy on-the-go smoothies and juices

Starbucks (UK): Refreshers Sparkling Energy Juice Beverage (2012):
Sparkling fruit juice beverage that packs a boost of natural energy from green coffee extract but looks and tastes nothing like coffee.

In line with this move into Juices, Starbucks also launched energy juice beverages.

Smoothies became popular as on-the-go healthy snacking and breakfasting.
Apple ≠ Superfruit

Consumer point of view
Not every apple commands a price premium
Figures: Apple is #1 fruit used within “Superfruit”

- Apple is the number 1 fruit in the top-15 ingredient list for product launches tracked with “superfruit” and “power fruit”.

![Graph showing the top-15 ingredients for "Superfruit / Power Fruit" launches in 2011, as a percentage of the total result set.](image-url)
Products: ‘Apple is a second class superfruit’

• Manufacturers focusing on super fruits are treating apple as a commodity
• Consumers do not seeing apple as a superfruit, despite its health benefits

United States: Bom Dia All Natural Acai + 10 Superblend Juice Drink
For the first time ever, an acai product combines the delicious goodness and antioxidant benefits of acai plus 10 other superfruits from around the world for a superior antioxidant beverage like no other. Ingredients: Organic Acai Juice, Apple jfc, Black Currant jfc, Lemon jfc, Hibiscus jfc, Raspberry jfc, Merlot Grape Juice, Chicory Fiber, Bilberry jfc, Blueberry jfc, Pomegranate jfc, Yumberry jfc, Natural Flavor, Noni jfc, Seabuckthorn Juice, Mangosteen Puree from Concentrate, Ascorbic Acid (vitamin C), Goji jfc.

Netherlands: CoolBest Power Fruit Yang Mei & Apple Drink
Description: Yang mei (yumberry) and apple flavored fresh juice drink in a 1L SIG combibloc. Ingredients: Fruit Juice (From Concentrate)(White Grape, Apple (20%), Cherry, Yang Mei (13%), Blueberry, Pear, Apricot), Vitamin C, Vitamin E.
Pink Lady: ‘Apples for beauty and health’

Promoting healthy body and mind

In addition to its great taste, Pink Lady® has great nutritional qualities. It is bursting with energy:

- **Vitamin C**, for a healthy appearance. An apple provides one quarter of the daily recommended dose of vitamin C (it contains 4% vitamins and minerals).
- Antioxidants for a younger and fresher complexion. Polyphenols reduce the oxidation that causes our cells to age; they also reduce the permeability of blood vessels, protecting both the heart and the skin.
- Water! Pink Lady® apples are 80% water which means they help to eliminate toxins.
- Fibre to aid digestion. Pectin, one of the fibres found in the apple, helps to regulate bowel movements and improve your intestinal flora.
- A tip: Do not peel the fruit, just rinse it. Almost 50% of the vitamin C is in the skin.
- A smart idea: Chew well! Digestive juices are a natural appetite suppressant.
- Did you know: Pink Lady® gives you energy. At 10% carbohydrate, it has more fructose than the average apple. It provides 54 Kcal/100g.

Promoting health vs. marketing quality

**In France:**
- 77% of consumers find Pink Lady® tastier than other apples.
- 71% of consumers find it crunchier.
- 73% of consumers think Pink Lady® has a unique and recognizable taste.

_Shopper France – January 2009_

**In Italy:**
- 93% of consumers find it crunchier than other apples.
- 94% of consumers find it tastier than other apples.
- 97% of consumers think it’s an apple of very high quality.
- 88% of consumers think it’s juicier than other apples.

_Shopper Italy – March 2011_

**In Spain:**
- 79% of consumers think it is an apple of great quality and taste.
- 65% think it’s crunchier, juicier and tastier than other apples.

_Study: Shopper Spain March 2010_
Regulations can offer opportunities

- Vitamin C claims approved by EFSA (2010):
  - Reduction of tiredness and fatigue
  - Contribution to normal psychological function
  - Regeneration of the reduced form of vitamin E
  - Contribution to normal energy-yielding metabolism
  - Contribution to normal energy-yielding metabolism
  - Maintenance of the normal function of the immune system
  - Protection of DNA, proteins and lipids from oxidative damage

- Evidence + Awareness = Opportunity

- Is the apple doomed to be a second ranked fruit or can it (re)gain share of mind at the expense of Superfruits?
Conclusions
Concluding remarks

- Superfruit launches doubled in the last 5 years
- Increase in product launches is slowing down
- Some superfruits have reached their maturity
- Superfruits have established their position
- Superfruits are here to stay.
- What’s the new superfruit?

Pitaya Plus (USA): Pitaya Super Juice

Based on fruit of cactus species and is loaded with fiber, electrolytes, and vitamins. It also contains significant quantities of phytoalbumin, an antioxidant which is claimed to prevent the formation of cancer-causing free radicals. Overall, this product has an innovative approach for its structure which is very dense, for something that’s between juicy and jelly, but refreshing.
Thank you for your attention

• Please send us your questions, comments and feedback.

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