

Imperial College
London

Exploiting Health and Well-Being Trends: Growing Markets for Tropical and Sub-Tropical Fruits in High Income Countries

Dr. David Hughes

Emeritus Professor of Food Marketing

International Seminar on Consumer Trends and Exports of Tropical & Sub-Tropical Fruits

Century Park Hotel, Bangkok, Thailand,
July 14th, 2008



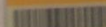
(S/C)백자메론

₩ 15,500



•양구메론

₩ 15,800



(S/C)메스크(목)

₩ 10,800







**Thrive
prawn treats**

20g

£2.99

£14.95 100g



0687657 2

**Thrive
real fish treats**

15g

£2.99

£19.94 100g



0499236 2









WAL★MART
SUPERCENTER

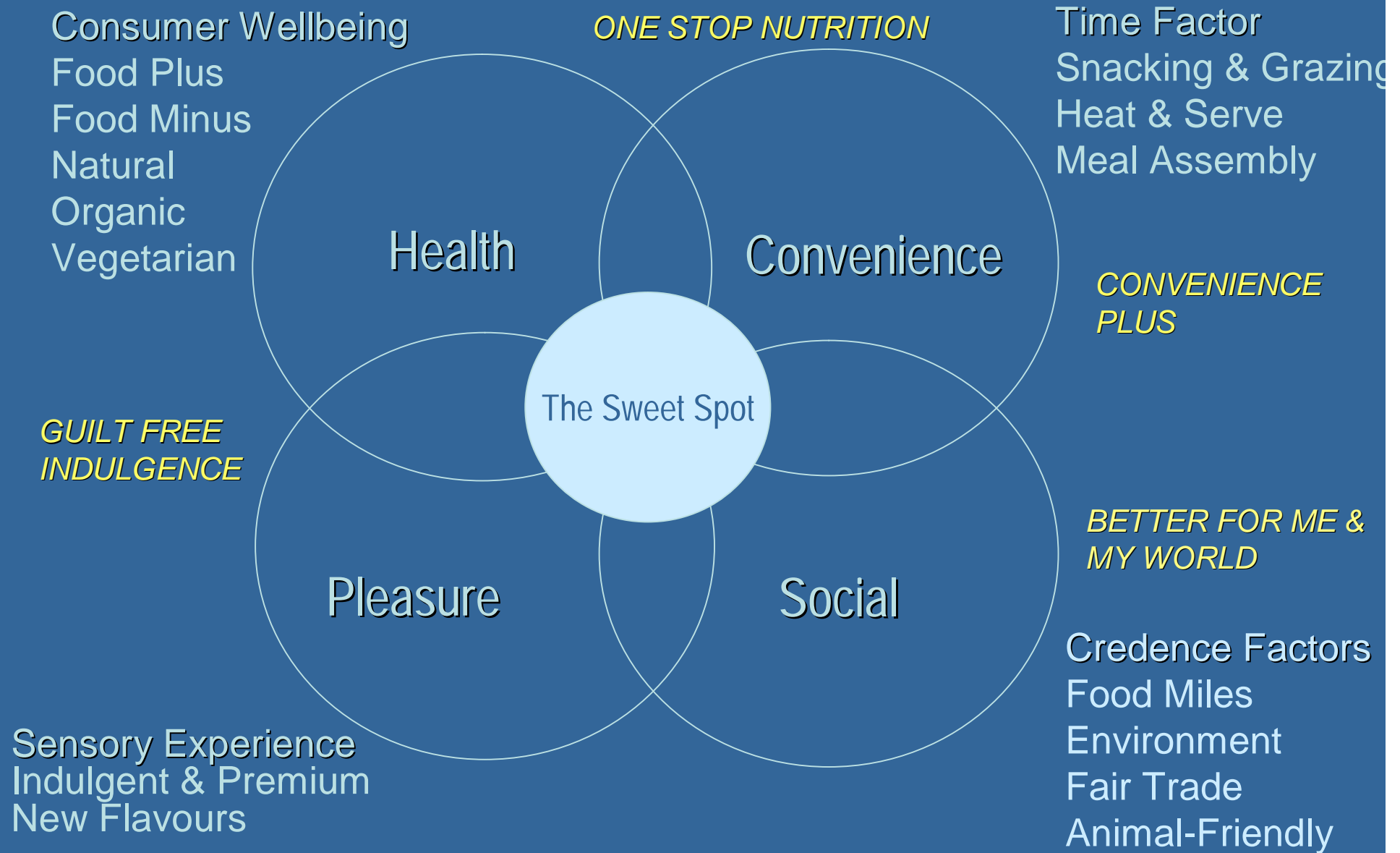




Is Physalis

- a. A dangerous sexually-transmitted disease?
- b. A delicious sub-tropical fruit?
- c. A popular girl's name in Russia?

Key Consumer Trends



Source: Datamonitor



How Do Tropical Fruits Score on Convenience?

- Açai Berry
- Banana
- Dragon Fruit
- Goji Berry
- Longan
- Mango
- Mangosteen
- Pineapple
- Pomegranate
- Rambutan

WHOLE FOODS MARKET



Cut Fruit



Fresh Cut Fruit

Fresh C





There is an easier way to eat pure mixed fruit.



TESCO

Blueberries



Tangy and sweet with an
intense flavour **BY05L58039**

See reverse for nutritional information.
Wash before use. Keep refrigerated.

Packed for Tesco Stores Ltd.,
Cheshunt EN8 9SL U.K © 2007.



Display until

21 NOV

Produce of

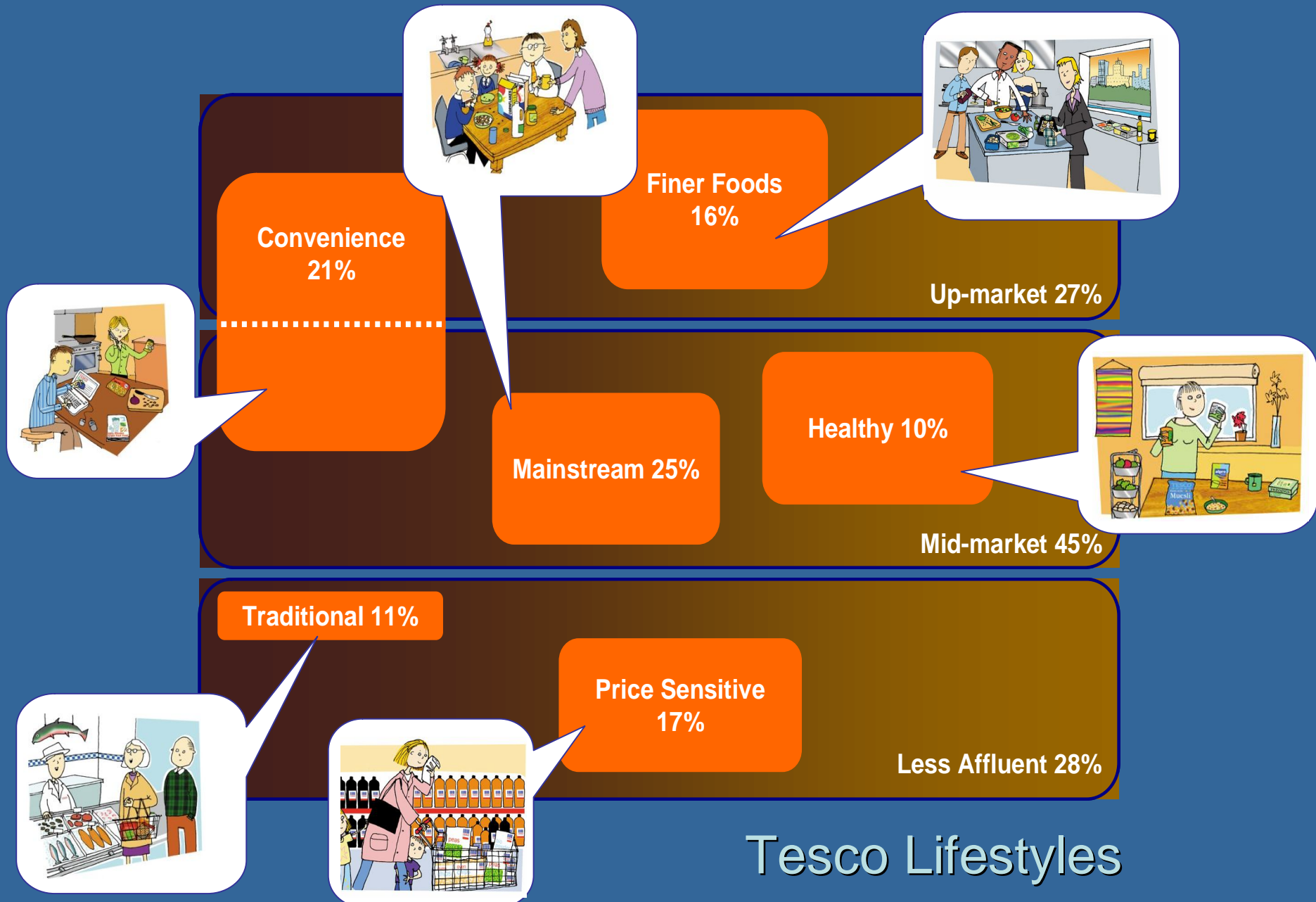
ARGENTINA

Best before

22 NOV

Weight

225g^e



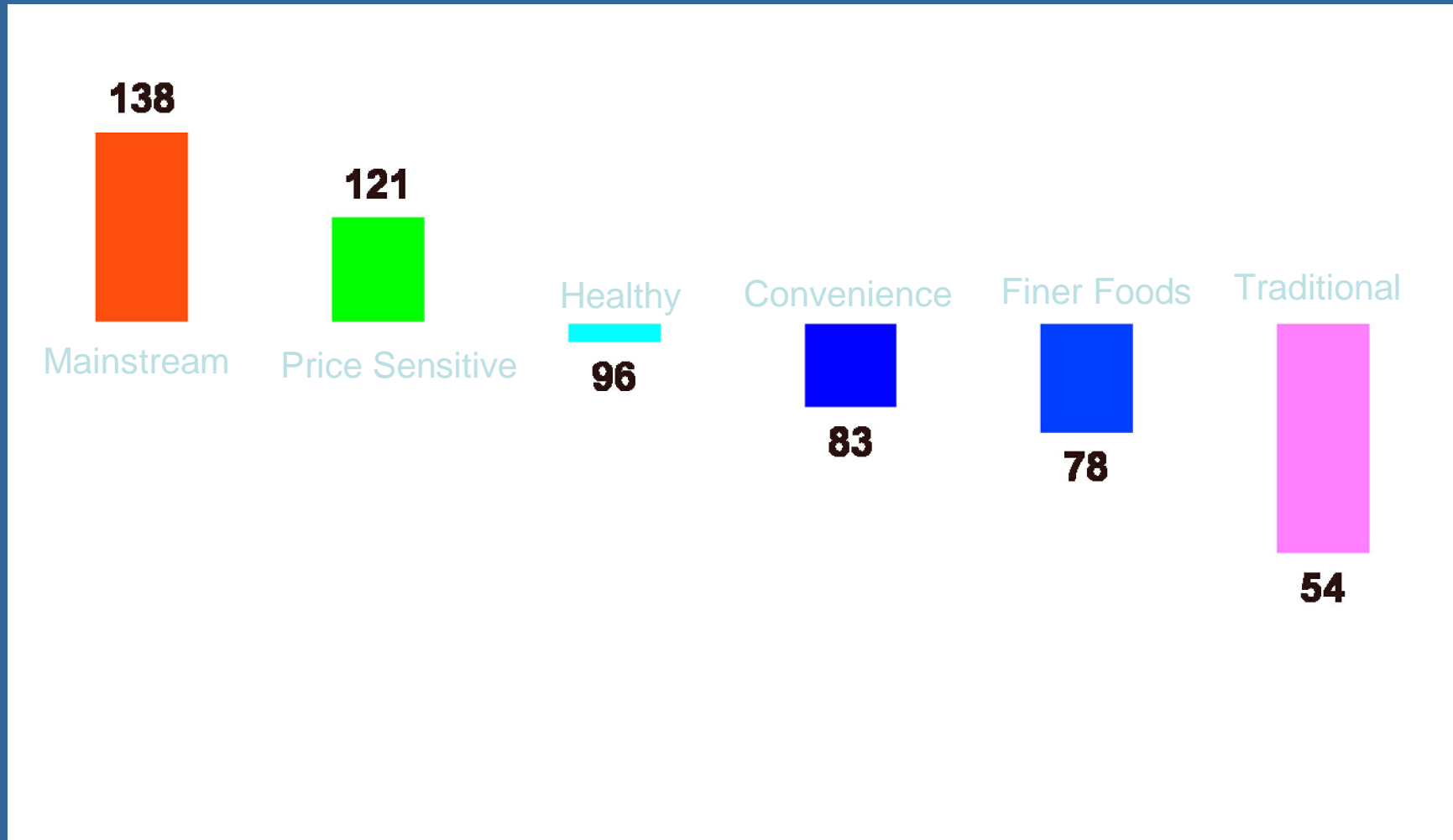
Tesco Lifestyles

Source: Tesco

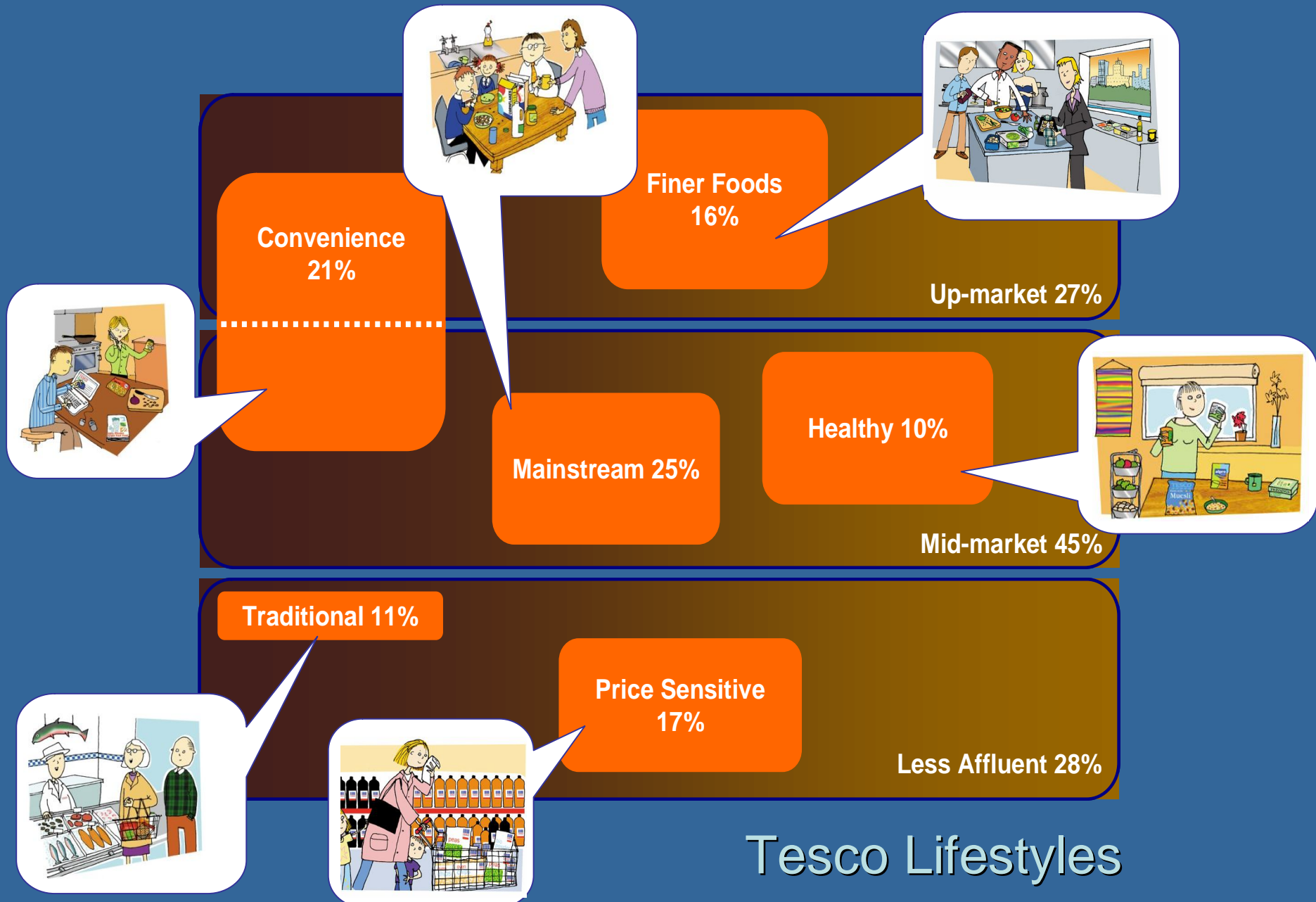
* 84% shoppers buy Value lines

64% shoppers buy both Value and Finest

Index of Tesco Club Card Customer Purchases of Red Apples by Segment



Source: dunnhumby, 2006



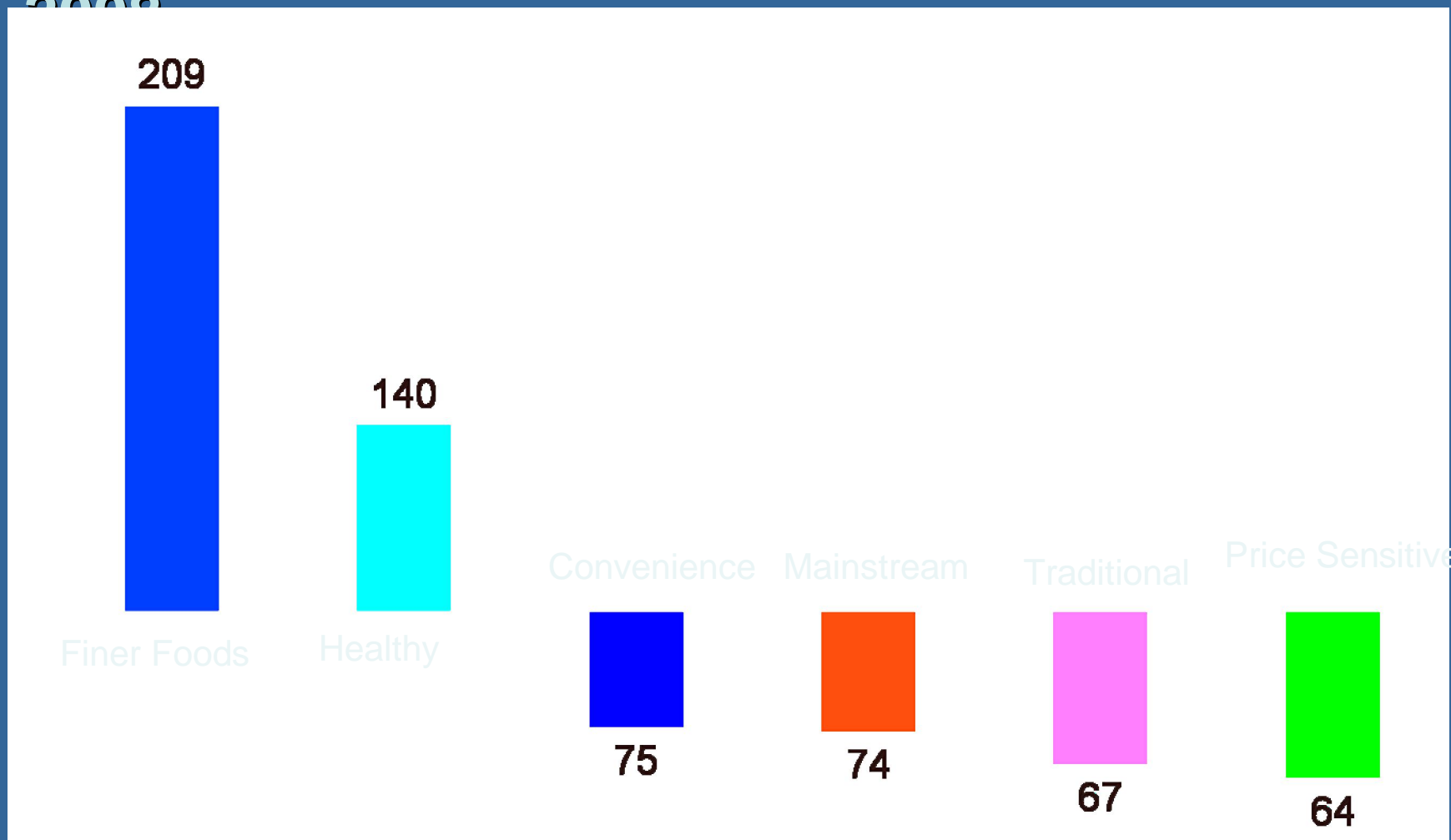
Tesco Lifestyles

Source: Tesco

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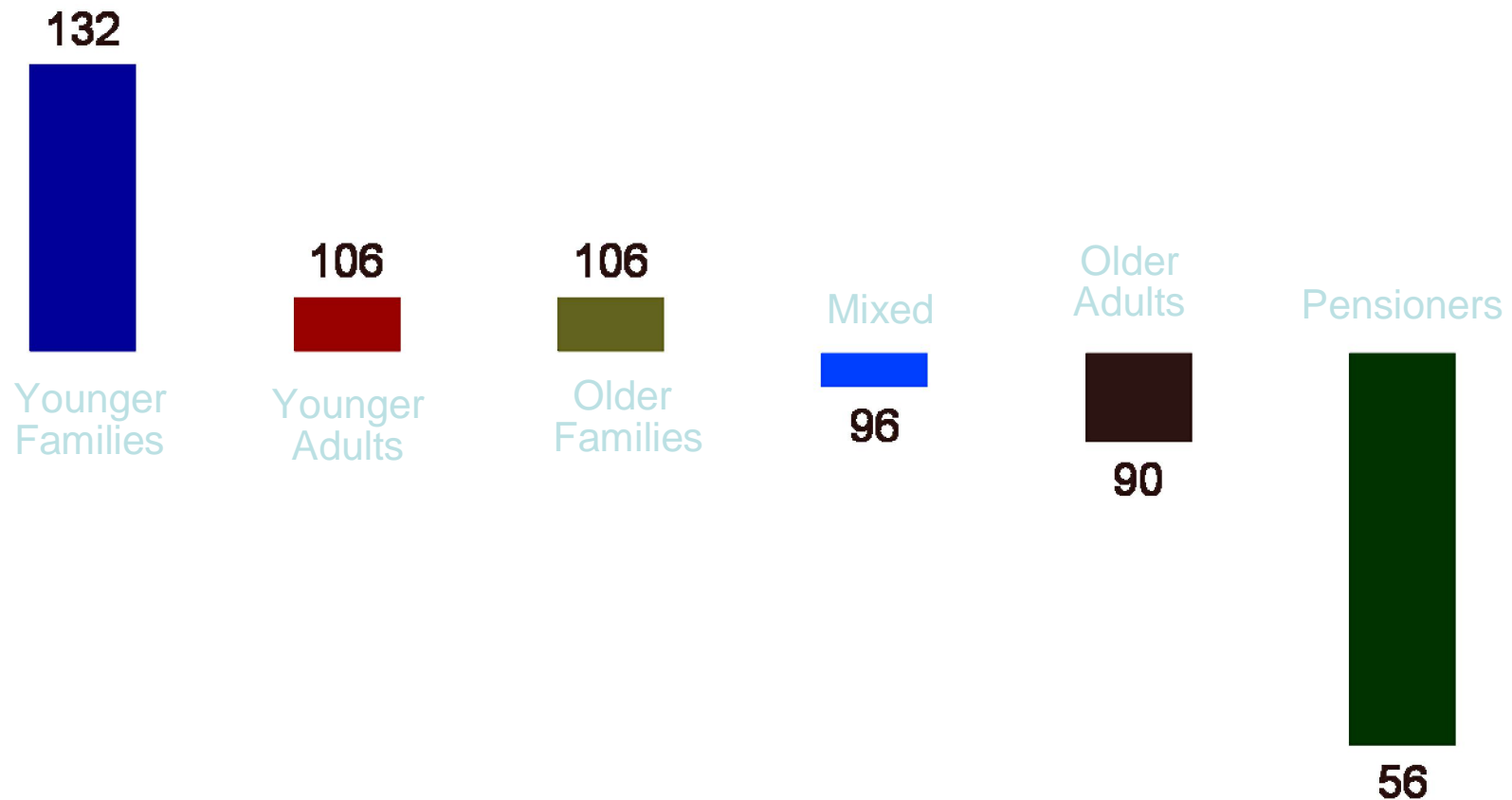
Index of Tesco Club Card Customer Purchases of Fresh Mangoes by LIFESTYLE Segment, UK, 2008



Source: dunnhumby, 2008

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Index of Tesco Club Card Customer Purchases of Fresh Mangoes by LIFESTAGE Segment, UK, 2008



Source: dunnhumby, 2008

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NEWSPAPER OF THE YEAR

THE AGE



ESTABLISHED IN MELBOURNE SINCE 1854

AUSTRALIA'S INDEPENDENT NEWSPAPER

FRIDAY, JUNE 20, 2008 \$1.50

OBESITY EPIDEMIC Nine million adults classed as overweight or obese

Australia's ticking 'fat bomb'

AUSTRALIA has become the fat-test nation in the world, with 9 million adults now

THEN... ... NOW


47 litres	FOOD Average volume of soft drink consumed per person per year in Australia in the 1970s and in the 2000s	113 litres
12-24 grams	Fast food burger fat content is twice level of 20 years ago	24-42 grams
30 grams	PORTION SIZE Standard packet of chips size in 1970s and now	50 grams
	INACTIVITY Increase in number of cars driven to work each day in Australian capital cities between 1976 and 2006:	70% (more than 1.4 million cars)

FAT NATION
Motto: Our girth is plain to see



TESCO

HEALTHY LIVING

Tracker 



TESCO

light choices...



"We want to grow from the respected and trustworthy food company that we are known as now, into a respected and trustworthy food, nutrition and wellness company"

Peter Brabeck-Letmathe

Blue Print for the Future, October 2001

The 100% breakfast

Quaker Oats and Tropicana have a lot in common.
They're both 100% pure and 100% natural.

Quaker Oats are 100% supergrain (the only wholegrain officially recognised to help lower cholesterol*).

While a 250 ml glass of Tropicana gives you 100% of your RDA of vitamin C.

So if you want a healthier start to the day, don't settle for anything less.



Is your breakfast as healthy as the 100% breakfast? Find out at www.healthierstart.co.uk

*as part of a diet low in saturated fat and a healthy lifestyle.



Get half your daily
fruit and whole
grains before
you're even out
of your slippers.

That's right. Half of the new U.S.D.A. recommended servings for fruit and whole grains can be satisfied with just a bowl of Quaker® Old Fashioned Oatmeal* and a glass of Tropicana Pure Premium® Orange Juice**. That ought to get you hopping.



100% Pure Fruit Smoothies



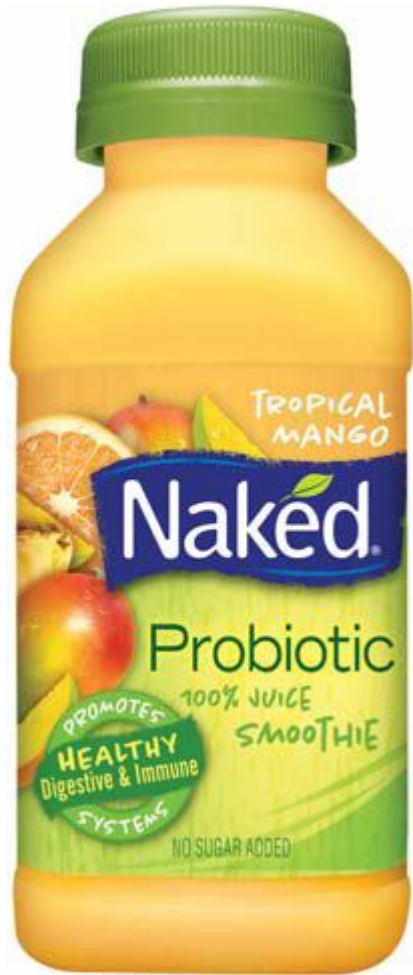
Expertly Blended for your Business

We're all trying to do a little bit of good for ourselves. That's why we've launched our new range of Pure Fruit Smoothies. Made from 100% pure fruit, they're available in 5 great tasting flavours that your customers will love, including Mango, Passionfruit and Pineapple, Strawberry & Banana and Blackberry & Blueberry. So why not do a little bit of good for yourself and stock new Tropicana Smoothies.

Tropicana®

Tropicana Smoothies are also available in 250ml packs RRP £1.79. 1 litre RRP £2.99.

 **PEPSICO**
INTERNATIONAL



Propel

FITNESS WATER

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[PROPEL YOUR WORKOUT](#)

[YOUR BONES YOUR BODY](#)

[GUNNAR ONE-ON-ONE](#)



PROPEL FITNESS WATER MADE FOR BODIES IN MOTION

- [▶ LEARN ABOUT PROPEL FITNESS WATER](#)
- [▶ LEARN ABOUT PROPEL CALCIUM](#)



FLAVORED RIGHT SO YOU HYDRATE BETTER

[SEE FLAVORS & SIZES](#) ▶

MELON

PEACH

GRAPE

LEMON

BERRY

BLACK
CHERRY

KIWI
STRAWBERRY

MIXED
BERRY
CALCIUM

MANGO
CALCIUM

MANDARIN
ORANGE
CALCIUM



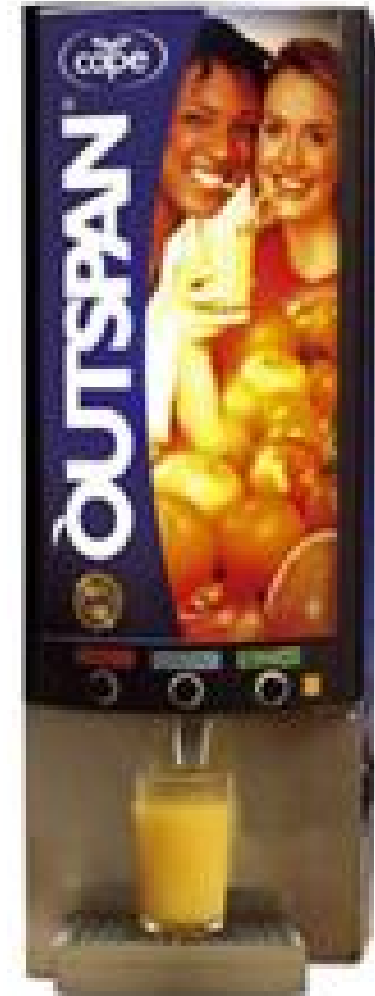
Bursting with Fruit and Vegetable Goodness - Knorr Vie



A delicious “smoothie” style drink of **concentrated fruit and vegetable juices**



At least **half your daily recommended intake** of fruit and vegetables crammed into one mini bottle







Health and Well-Being Trends 2008

- Weight Management
- Digestive Health
- Super Fruits and Veggies
- Naturally Healthy
- Beauty Foods (and mood foods, too)
- Common Sense Re-emerges
- Healthy and Reduced Guilt Snacking
- Kids Nutrition
- Health Claims and Corporate Performance
- Well-Being of the Planet



Enjoy Longer Lasting Satisfaction



NEW Danone Shape 'Lasting Satisfaction'

With a total launch package of **£5m!** including TV, on air August 2006

- The first diet yogurt to offer consumers an **added health benefit**
- Contains a unique blend of **Effective Fibres and Proteins (EFP-)** proven to keep you feeling **satisfied for longer**
- A range of **delicious new flavours** in 5 pack varieties; Raspberry and Strawberry, Strawberry, Peach & Passion Fruit and Mango, Blackberry and Cherry, Banana and Apricot
- Since launch, 48% of sales incremental to the diet category*

* Source: AC Nielsen homescan. 15 weeks ending 15/7 vs previous 15 weeks.

Available in store now!

Weight Burner™ Super Boost

When combined with a balanced diet and exercise, Weight Burner is part of an effective weight management program.* Contains extracts from the safflower plant to help reduce body fat and promote lean muscle mass.** Best with Jamba Light or All Fruit Smoothies.

What's right for you today?



LESS
CALORIES?

-OR-



BOOSTED?

-OR-



TREAT?

-OR-



SOMETHING
DIFFERENT?





Say hello to our low GI smoothies

Diets are about as exciting as cleaning out the cupboard under the sink. But we have to say that we've recently become quite excited by the thinking behind the GI diet. It's full of sensible advice - the stuff that your mum's been telling you for years i.e. stay away from junk and eat your fruit and veg. And do you know what? Because we use lots of whole crushed fruit, which is full of fibre, all of our smoothies have a low GI score. For example, mangoes 🥭 and passion fruits 🍌 is a 46 whilst strawberries 🍓 and bananas 🍌 is a 52. Which officially makes them low GI foods and gives us a chance to sound all hip and 'now' by name-dropping GI. We're, like, so cool.



Coca-Cola



Nestlé



Enviga, a very new name for Coca Cola's new calorie-burning, carbonated green tea drink

8x100g e = 800g



Keep refrigerated at
+ 4°C max. Use by:

SHAKE BEFORE USE.

Actimel®

L. CASEI IMUNITASS



BLUEBERRY

Probiotic drinking yogurt with L.casei Imunitass® cultures
and blueberry



PlumSmart® delivers all the digestive benefits of prune juice, but is clear, tart-crisp, and refreshing. It tastes fantastic!



Food groups of fruits, vegetables and whole grains serve up plenty of fiber, so eat them in abundance.



Riding on the Coat Tails of the Health and Well-Being Mega Trend

Sales and Sales Growth for Fresh Berry Fruit in the UK Retail Market, 2004-2007

	€Millions		
	2004	2007	% change 07/04
Strawberries	271	391	+44
Raspberries	65	112	+72
Blueberries	20	73.9	+370
Blackberries	4	17.3	+433
All Berry Fruit	366	602	+64

Source: TNS UK, various years









THE CRANBERRY Ranks **Number 1**

IN ANTIOXIDANT AND ANTIADHESION BENEFITS

Thirty-five studies, worldwide consumer appeal and the support of the world's leading cranberry supplier place this berry healthily ahead of the rest.

FIGURE 1

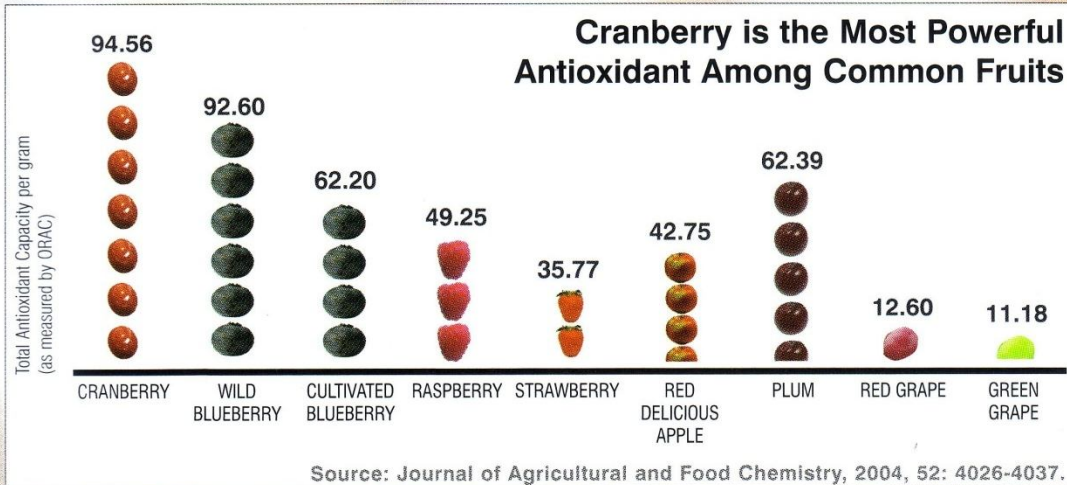
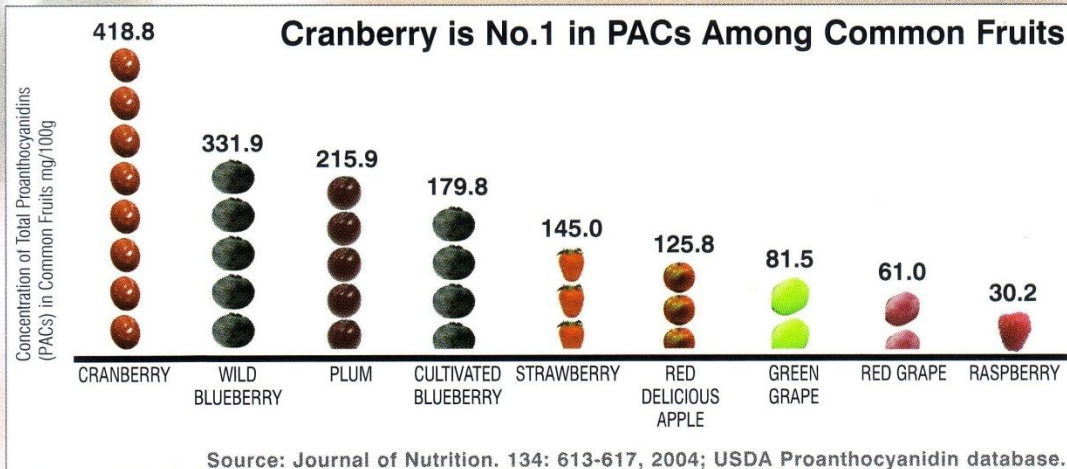


FIGURE 2





It's Naturally Healthy if:

- No e-numbers/artificial additives/sweeteners
- Naturally high in fibre, calcium, anti-oxidants
- All natural
- Wholemeal
- Organic, free range, outdoor
- Made with real vegetables/fruit
- Free from ... gluten, lactose, meat
- No saturates/trans fats
- Low fat/salt/sugar
- Cooked in olive/sunflower oil

NEW!

Everything in life is better, when your day starts with a touch of chocolate!

- ✓ Made with real chocolate
- ✓ Made with whole grain Quaker Oats
- ✓ Good source of fiber
- ✓ Low in fat

NEW!

MADE WITH REAL CHOCOLATE



life CEREAL

chocolate OAT CRUNCH

NATURALLY & ARTIFICIALLY FLAVORED
Whole Grain Oat Cereal with Real Chocolate in Chocolate Flavored Oat Clusters



ENLARGED TO SHOW TEXTURE

Ⓛ D

NET WT 13.3 OZ • 379 g



Danone Yoghurt: Beauty from the Inside Out!



Beauty, day and night

Dairy-based health drinks have recently tended to be positioned as a daily shot (e.g. Yakult), and are more often than not consumed at breakfast. Nestlé has taken the



concept one stage further, borrowing an idea from the skincare market where day and night creams are commonplace. The company's Day & Night collagen-enriched low fat drinks, on sale in Hong Kong, each come in a 225ml bottle. The Day drink is in a Brightening Grapefruit flavour, in a white bottle, while the Night variety, in a black bottle, comes in

Vitalising Mixed Berry flavour. The drinks are formulated with water, juice, sugar, milk solids, live yoghurt culture, and 1.3g of collagen per 100ml, and are said to maintain skin elasticity and moisture. A pack of two bottles sells for the equivalent of around €1.50.

OPEN HERE

**Jack
Klijn**

Rijk aan
● vitamine E
● magnesium
● fosfor

Bron van
● vitamine B2
● ijzer
● foliumzuur

BEAUTY *mix*



Vitamine B2 en E helpen je huid zijn
natuurlijke glans te behouden

Een heerlijke mix van amandelen, hazelnoten,
ananas, cranberry's en rozijnen

125g e



This is a mix of almonds, hazelnuts, pineapple, cranberries and raisins, and is claimed to be a good source of vitamins B2 and E, which help to enhance the skin's natural glow.



Using Fresh Fruits
and Vegetables

Commonsense Re-Emerges: For Instance

- Don't use the golf cart
- Don't use the elevator
- Get off one stop before ...
- Use a smaller dinner plate
- No salt on the table
- One booze free day a week
- Choose a wine under 13% ABV

Twenty easy ways to lose 100 calories



An extra 100 calories here and there may not sound like a big deal if you are watching your weight. Yet if over the course of one year you saved

yourself this number of calories each day, you could save 36,500 in total, which equates to dropping 10lb in weight.

- drop cereal and toast for muesli and fruit
- ditch croissant for poached egg, tomato and toast
- have baked potato with beans and salad, not cheese and butter
- eat a few chocolate buttons, not a chocolate slab
- Kit Kat + 2 servings fruit, rather than Mars Bar
- skinny rather than whole milk Cappuccino

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- Health Claims and Corporate Performance
- Well-Being of the Planet



- Creation of healthy crisps sector
- Healthy tasty alternative to crisps and chocolate
- No Fat, No Sugar, No Salt - Five-a-day DOH endorsement!
- Impulse snacking - perfect for lunchboxes and on the move

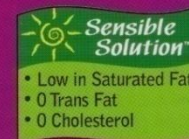


Apples contain many essential nutrients such as vitamin C and Calcium. They help maintain a healthy digestive system.

NEW THINSATIONS
RECOGNIZE A SIMPLE TRUTH.
SOMETIMES YOU JUST WANT TO
Eat The Whole Bag.



100 CALORIES
PER 23 GRAM PACK.



Switch to Dark™



Antioxidants never tasted so good

Dark chocolate is a surprisingly rich source of antioxidants.¹ Studies have shown it contains more antioxidants than the antioxidant heroes, red wine and tea.^{2,3,4}

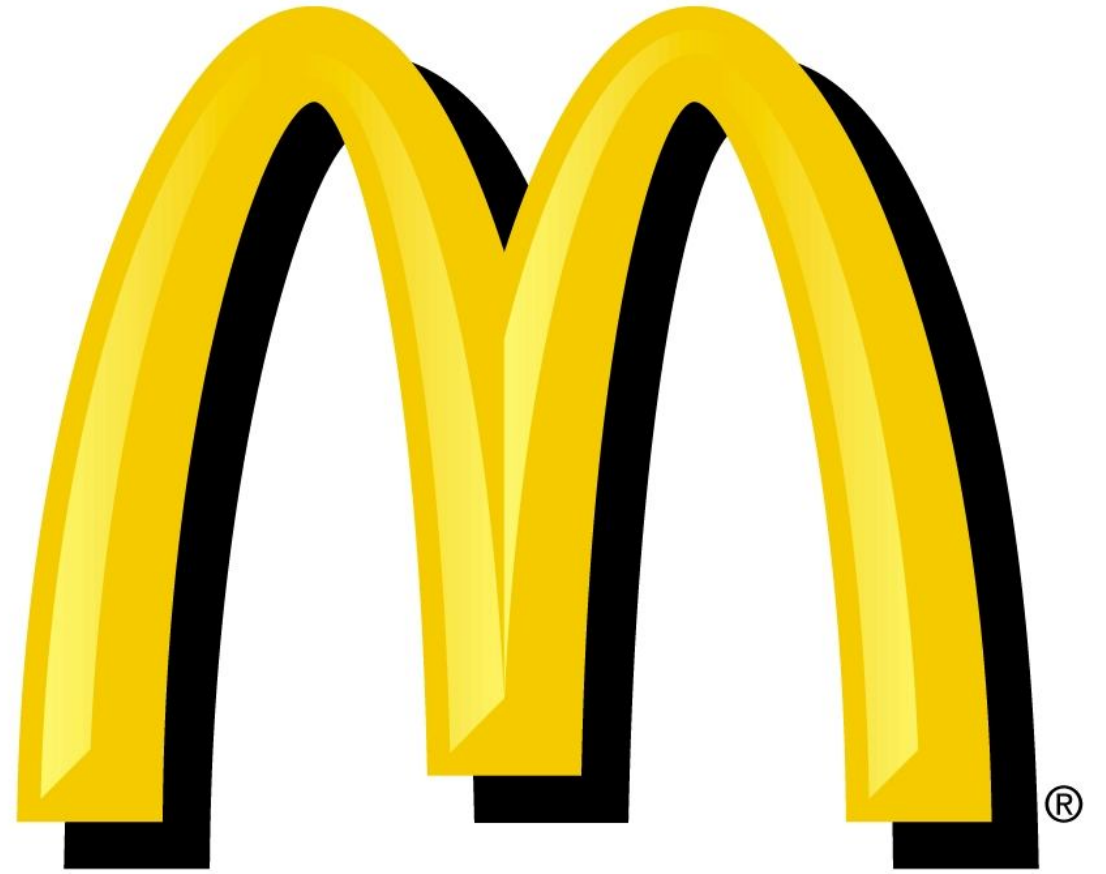


References: 1. Vinson JA et al. *J Agric Food Chem* 2006; 54(21): 8071-76. 2. Ding EL et al. *Nutr Metab* 2006; 3(2): 1-12. 3. Serafini M et al. *Nature* 2003; 424(1): 1013. 4. Vinson JA et al. *J Agric Food Chem* 1999; 47(12): 4821-24.



Nestlé

Good Food, Good Life



i'm lovin' it™

Kids should drink bananas, not go bananas.



When we sat down to make some kids' smoothies, we kept it natural. The only ingredients we use are the finest crushed whole fruit and pure juice. That's it. 100% fruit, with none of those weird additives or added sugar that will have your little ones running riot. Just a full portion of fruit in every little carton, and a whole seven portions in every big carton.

innocent smoothies for kids. nothing but nothing but fruit.

Health and Well-Being Trends 2008

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€3.00

Albania US\$2; Australia A\$6.50 (inc GST); Bulgaria BGL5.90; Canada C\$4.85 (Toronto C\$4.60); Croatia KN24; Cyprus CE1.60; Czech Rep. CK85; Denmark DK25; Estonia K30; Gibraltar GE0.80; Hungary F580; Kenya KSH185; Latvia LVL2.60; Malta ML1.00 €2.33; Morocco D25; Norway NK30; Poland ZL10; Romania €3.42; Russia US\$2.75; Slovakia SK100; Sweden SK30; Switzerland SF6; Thailand B190; Turkey YTL 4.50; Ukraine US\$3.50; USA US\$3.75

David Healy
Football's modest hitman

Sport Page 37



The ethics of air-freighting organic food

G2 Page 10

Michelle Paver
Is her stone age orphan the next Harry Potter?

G2 Page 8



International edition

Thursday 06.09.07

guardian.co.uk

the guardian

Danger to children from food and drink additives is exposed

● Study links to hyperactivity and disruptive behaviour

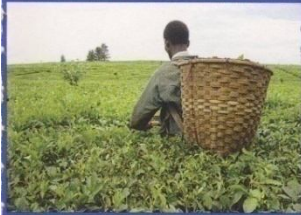
● Government body tells parents to check packaging labels

● Angry reaction as decision on law change is passed to Europe

Responsible Tea...



...makes a World of Difference



"All of a sudden everybody is talking about being ethical or responsible"

"At Tetley though, we've been practising this for years. For example, we've been members of the Ethical Tea Partnership, a non-commercial alliance dedicated to assuring the living and working conditions for people on tea estates, since 1997. But this is just the beginning. As the largest single importer of tea from Malawi we choose to give back to the villages in the tea growing region there, providing resources every year to give 10,000 people access to clean safe water near their home. And, with our environmental hats on, our factory is using less energy today to turn a tonne of raw tea into finished packs of Tetley tea than it did the previous year."



Why is this important to you?

- Your customers make purchasing decisions based on products being ethical and responsible
- An ethical tea sits perfectly alongside other responsible beverages such as coffee and hot chocolate
- Offering an ethical tea shows you care about the ingredients and product you use in your operation

At Tetley we're committed to making sure our success does not come at the expense of the people, or the environments, that make it possible. We all have a shared responsibility for the social, ethical and environmental aspects involved in sourcing the Nation's Favourite Tea. Let's make it work together!"

Joyce Muendo

Joyce Muendo, Tea Buyer, African and Speciality

Tetley

164 P
enquiryexpress.com

Tetley. Everyone's cup of tea.

www.teaexperts.co.uk



Tetley is a member of the Ethical Tea Partnership, a co-operation between many of the largest tea manufacturers to ensure the tea they use is ethically sourced. Find out more: www.ethicalteapartnership.org

Meet the frog that made us sweat.



The frog that you'll see on our bananas from now on is not just any frog. It's the little frog certification seal of the Rainforest Alliance, an independent NGO whose mission is to protect eco-systems and the people and wildlife who depend on them. We've worked closely together with them to achieve harmony between nature and economy. That's no easy exercise, as you can imagine. But we did and are still doing a lot about it. Because who wants to argue with a frog?

www.rainforest-alliance.org

Chiquita. Growing a better banana.



The Economist

DECEMBER 8TH-14TH 2007

www.economist.com

Why you should still be scared of Iran

The world's best and worst schools

Unzipping your genes

The beginning of the end for Chávez

Our books of the year

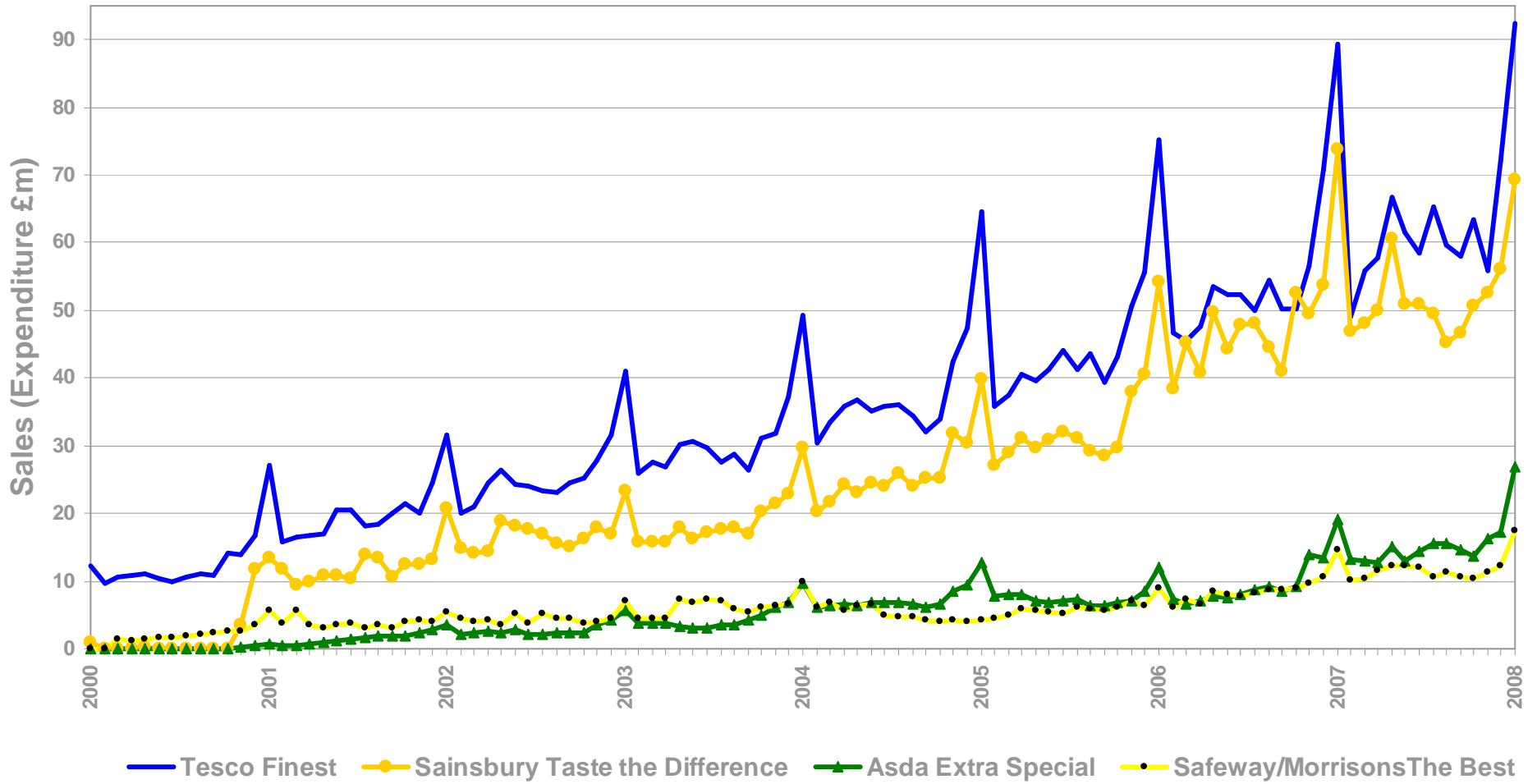


£3.60

49



Premium Private Label Sales Trends



Shopper Anticipated Responses to Household Budget Squeeze

Response	Percent
Increase spend on budget brands	33
Cut back on treats	26
Shop around for offers	25
Cut back on convenience food	22
Switch from brands to own labels	21
Change to discount retailer	13
Cut back on ethical buying	6
Spend same on food, cut back elsewhere	15

Source: IGD, Consumer Survey, 2008

Some Conclusions

- Health, well-being and beauty – genuine consumer mega-trend and *not* to be missed
- For “tropicals”, need to sort out consumer knowledge, convenience and social issues
- Fresh fruit exporter, or value-added processor?
- Need to build partnerships with key channel captains servicing high income markets
- Big FMCG companies see health/beauty attributes as delivering sales growth and margin

Some Conclusions

- Harness consumer “pull” of health trends and capitalise on *NATURAL* strengths
- Building consumer awareness requires smart use of PR – advertising too costly for most
- Intrinsic product health benefits need to have documented scientific credentials
- Household budget squeeze in a food price inflationary world, major challenge for premium tropical products

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