

THE LATEST **INGREDION IDEA LABS™ i2S BRIEF**

# THE RISE OF CLEAN LABELS

New research reveals what consumers  
really want to see—and not see—on food  
and beverage labels.

Ingredion each year surveys and analyzes consumer attitudes toward clean labels in 17 countries around the world, documenting the rise of this megatrend over the past five years. This brief offers a snapshot of 2015 results with U.S. consumers.

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CONSUMERS WANT  
INGREDIENTS THEY  
RECOGNIZE AND  
UNDERSTAND.

U.S. consumers aren't just reading labels, they're scrutinizing them. **Standing in the grocery aisles with heads bent and products in hand, they are searching for claims and ingredients that make their buying choices easy.** This one goes in the cart; this one goes back on the shelf. Which product will yours be?

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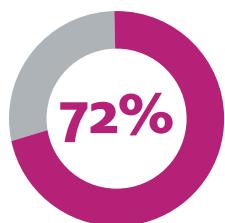
For detailed survey results, please contact Ingredion at 1-866-961-6285.

# WHAT CONSUMERS WANT TO KNOW

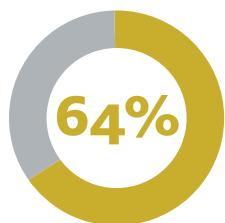
Clean labels are more important than ever. In the United States, the drive for clean and simple continues to expand, with nearly three-quarters of U.S. consumers finding it important to recognize the ingredients used in the products they buy.<sup>1</sup>

## Reading labels front and back

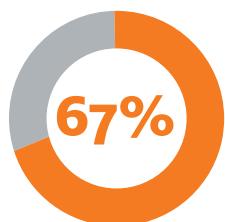
While the majority of consumers look at front-of-pack claims, many also are interested enough to turn packages over to look for the ingredients that led to the claim—and to see if they can find other reasons to buy or not.



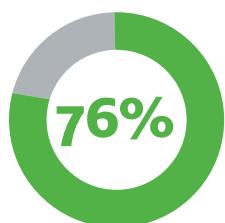
OF CONSUMERS USUALLY OR ALWAYS **READ CLAIMS OR DESCRIPTIONS ON THE FRONT OF THE PACKAGE**<sup>1</sup>



OF CONSUMERS USUALLY OR ALWAYS **READ CLAIMS OR DESCRIPTIONS ON THE BACK OF THE PACKAGE**<sup>1</sup>



OF CONSUMERS FIND IT **IMPORTANT TO HAVE A SHORT AND SIMPLE INGREDIENT LIST**<sup>1</sup>



OF CONSUMERS FIND THE **INGREDIENT LIST VERY IMPORTANT—ONLY PRICE AND BRANDS MATTER MORE**<sup>1</sup>

The ingredient list helps justify price in the minds of consumers and is of particular interest to shoppers over age 30. Ask us for additional demographic insights.



## “Natural” beats “no artificial ingredients” in appeal



**40%**

40% ranked “**natural/all natural**” as #1 in terms of appeal on the front of food or drink packaging<sup>1</sup>



**31%**

31% ranked “**no artificial ingredients**” as #2 in terms of appeal on the front of food or drink packaging<sup>1</sup>

## Yet more would switch brands for “no artificial ingredients”



**58%**

58% of consumers ranked “**no artificial ingredients**” as the claim most likely to make them consider switching brands<sup>1</sup>

## Recognizing and accepting ingredients

Kitchen cupboard ingredients like sugar, flour and corn starch are known and accepted by consumers as ingredients they want to see in foods and beverages.



There are a number of ingredients that consumers aren't sure about and still others that consumers are wary of.<sup>2</sup>

### FAMILIAR INGREDIENTS

#### Ingredients that are unambiguous and accepted by a majority of consumers<sup>1</sup>

Natural flavors	Whey protein
Antioxidants	Soy protein
Natural colors	Corn starch
Sugar	Gelatin
Flour	
Vegetable oils	

(in order of acceptability)

### UNFAMILIAR INGREDIENTS

#### Ingredients that are unambiguously not accepted by a majority of consumers<sup>1</sup>

Guar gum	Monosodium glutamate (MSG)
Maltodextrin	Carboxymethyl cellulose (CMC)
Carrageenan	Microcrystalline cellulose (MCC)
Mono- and diglyceride fatty acids	Hydroxypropyl methylcellulose (HPMC)
Hydrogenated fats	
Caseinate	

(in order of non-acceptability)

Ask us about the full rankings and the best places to use—or not use—these ingredients in your formulations.



## The many facets of clean label

**recognizable**  
on trend kitchen cupboard ingredients  
**short ingredient list**  
minimally processed non-GMO  
**real authentic additive-free**  
**transparency**  
**healthier and safer**  
**natural acceptable**  
no artificial ingredients

### Defining clean label for you<sup>3</sup>

To help our customers develop successful clean label products, Ingredion has developed this best practice definition, based on extensive research:

- ✓ Simple ingredients that consumers understand
- ✓ Free from chemical additives
- ✓ Minimally processed foods

### HealthFocus International research identifies shopper attitudes toward "natural"<sup>2</sup>



## Retailers are advancing clean labels

Retailers are raising consumer consciousness and expectations. Examples include:



## % of new clean label products among all launches in North America<sup>4</sup>

Types of claims tracked include "natural," "organic" and "no additives/preservatives"



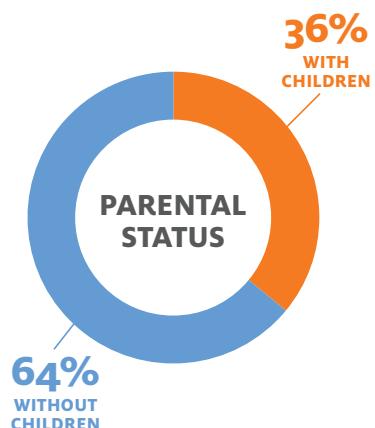
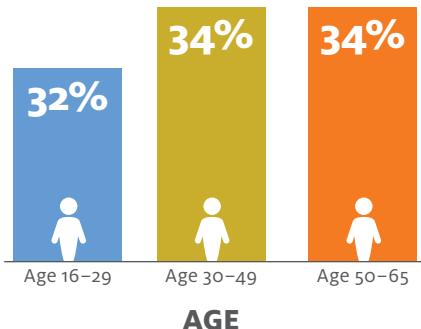
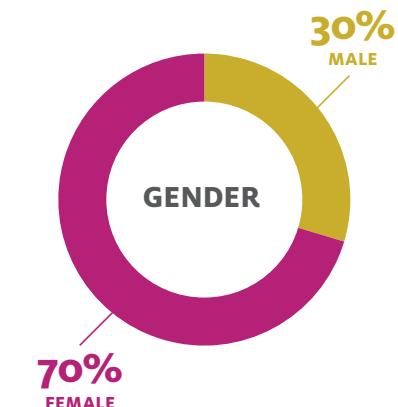
While Europe embraced the clean label trend many years ago, North America manufacturers are still replacing or reducing additives—primarily preservatives, artificial flavors and colors.

## Where do consumers most value clean labels?

Ask us for the ranking of food and beverage categories consumers most want to be "additive-free."



## The consumers we surveyed<sup>1</sup>



### SOURCES

<sup>1</sup> Ingredion proprietary research, MMR, Consumer Study, 309 consumers, USA, April 2015

<sup>2</sup> HealthFocus International, Natural Survey, USA 2013

<sup>3</sup> International Food Ingredients, No. 3, 2010; clean label industry definition by Ingredion

<sup>4</sup> Mintel GNP, new products launched, February 2015, U.S./Canada Food

# INNOVATE IN CLEAN LABEL WITH INGREDION IDEA LABS™ SCIENCE-BASED PROBLEM SOLVING

Only Ingredion helps you achieve your clean label goals with cutting-edge innovation in the U.S. and around the world. Bring chef appeal and restaurant-level quality to your products with our CULINOLOGY® capabilities. Take advantage of consumer insights, applied research, applications knowhow and process technology at our global center in Bridgewater, N.J., and get access to expertise at all of our 25 centers.

## Expertise and innovative clean label ingredients

As a pioneer in the clean label movement, we bring two decades of clean label formulation expertise to your team, plus a broad portfolio of clean label ingredients.

- **Wide range of non-GMO ingredients.** Benefit from starches, flours, sweeteners, emulsifiers, hydrocolloids and nutrition ingredients, all meeting third-party non-GMO standards and the legislative requirements of the countries in which Ingredion operates and supplies ingredients. Today, 47 of our ingredients are verified by The Non-GMO Project.
- **More than 25 NOVATION® functional native starches.** Deliver the same shelf life stability and process tolerance as traditional modified starches with the advantage of clean labeling.
- **HOME CRAFT® functional flours.** Choose from functional tapioca, rice and pulse-based flours to help you maintain a clean label as you target texture profiles and maintain functionality.
- **Vegetable-based VITESSENCE™ Pulse proteins.** Boost the nutritional profile of your formulations while supporting a clean label.
- **ENLITEN® stevia.** Achieve taste, quality and performance backed by Ingredion's Americas-based farming and production process.
- **Q-NATURALE® high-efficiency emulsifier.** Create clean label beverages and higher margins.



Put the insights and expertise of Ingredion to work for your next clean label innovation.

**Innovate with us**  
[ingredion.us/cleanlabelnow](http://ingredion.us/cleanlabelnow)  
**1-866-961-6285**