

# EXPO WEST

## SPINS Reviews the Show Trends

Transparency and accountability were the underlying values that drew my attention to the companies and products featured at Expo West this year. Mounting interest in the backgrounds behind brands, eco and social impacts resulting from business choices, quality and sourcing of ingredients, and expanding options in organic, Fair Trade, vegan, and allergen-free continue to push our industry “beyond.”

At this year’s show, there seemed to be a prevailing trend: products are not only touting one Natural and Organic Products Industry (NPI) positioned attribute, but many. Furthermore, there was increased emphasis on the the story behind the brands. In response to consumers placing greater value on brand transparency, manufacturers are making their backgrounds and their missions known through new and innovative marketing efforts and packaging design. Today’s dedicated natural consumer considers a multitude of factors in their purchasing decisions at retail, transparency and accountability being two of them. These qualities are not new, but have recently gained more ground.

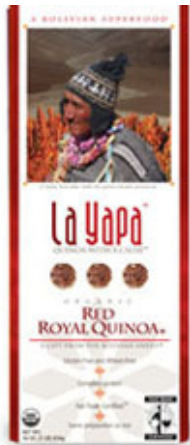
Our choices in natural food, beverages, body care, general merchandise, and herbal and vitamin supplements have given rise to a unique industry. The “beyond organic” theme witnessed at last year’s show was symbolic of a whole new set of standards that we have set as natural consumers. As we make way for and embrace new product attributes, these areas continue to develop and move forward. We look forward to a successful and compelling future for our industry, one that has no bounds and will have a strong impact on the underlying dynamics of consumer’s decisions.

\*\*The following review is not comprehensive of the proposed segments. Its purpose is to highlight these areas but not to define them.

Thanks,  
Brent Coons  
Director – SPINS Product Library  
productlibrary@spins.com



## A Background Behind the Brand



- **Organic Valley:** Offering new milks featuring individual farmers on the label
- **Divine Chocolates:** Worker owned, with its farmers as shareholders and on the board of directors
- **Sunland Peanut Butters:** Farmer owned and grown in New Mexico and Texas. The butters come in unique flavors like banana, thai ginger, raspberry, vanilla cranberry, and onion parsley.
- **La Yapa:** “Quinoa with a Cause.” This company is not only fair trade certified but also works directly with farmers and Andean Naturals to ensure access to education for Andean children
- **Hacienda El Castillo:** Family owned chocolate plantation that is Rainforest Alliance Certified
- **Just Bare Chicken:** Each product can be traced the family farm on which the chicken were raised. Farms are domestic and cage free; chicken are vegetarian feed and hormone free.

## Eco and Social Impacts of Business Choices

### Charitable Support

- **Nutiva**
- **Shaman Organic Chocolates**
- **Numi Tea**
- **NOW**
- **Ruth's Hemp Foods**, HempPower bars, donating 20% of profits to **Vote Hemp**, a non-profit organization aimed at legalizing commercial hemp in the US
- Various companies are members of **1% For the Planet**, an alliance of businesses that donate at least 1% of their annual revenues to environmental organizations worldwide.
- Companies are becoming certified **B Corporations** that use the power of business to solve social and environmental problems



## Quality and Sourcing of Ingredients

### BPA free

- **Revolution Foods & Plum Tots:** Market to children
- **Rainbow Light**
- **Made:** Ready-to-drink beverages that are also vegan, gluten-free and organic
- **Dragon Pearl:** BPA free plastic bottle for their green tea shot

## Non GMO:

Gaining ground and expected to attract more attention.

There are different levels of non-GMO claims, including manufacturer label claims and 3<sup>rd</sup> party certification that involves testing of ingredients. The Non-GMO Project is a non-profit organization made up of leaders in the Natural and Organic Products Industry with a common mission of ensuring the sustained availability of non-GMO choices to consumers. The organization is working to position itself as a leader within the non-GMO arena and to build trusted brand recognition.



Base commodity ingredients like corn and soy are now generally considered to be genetically modified if they are not organic or verified non-GMO. Trust in our suppliers and product manufacturers is becoming increasingly important as the Natural Product Industry's standards continue to evolve.

I feel that non-GMO will face a similar threat to that of gluten-free, namely cross-contamination within the supply and manufacturing chain. If this is the case, it will become relevant to all product categories and ingredients, and brands will push industry standards by working in dedicated GMO free systems.

Non-GMO Brands and Products:

- **Jolly Llama** squeezups
- **Suzie's** crackers
- **Sweet Leaf Teas**
- **Ruth's Hemp Foods** tortilla chips with chia and hemp
- **Lundberg**
- **Food Should Taste Good**, moving to label all their products as such
- **El Burrito** non-GMO soy sausage
- **VerMints**
- **Clif Bar**, new granola bars
- **V Bites**, new vegan cheese, meat substitutes, and frozen entrees
- **Mediterranean Snack Food Co** lentil chips, also vegan and gluten-free
- **Guayaki** energy shots
- **Viana** veggie meat subs, also vegan and made with organic ingredients
- **Maria and Ricardo's** tortillas, also vegan and gluten-free
- **Nature's Path**

# Options that go "Beyond" Natural and Organic

## Vegan

There were many vegan products featured at the show, most of them now falling under other attribute buckets as well. This is encouraging as vegan options continue to find their way into a wide variety of brands and products. In addition, proper labeling, marketing, and even certification continue to be on the rise.



## Low Glycemic

- **Lo-Gly** beverages
- **Luna and Larry's Coconut Bliss** vegan ice cream
- **Silver Hills Bakery** sliced bread, with several SKU's formulated for diabetics
- **Alvarado Street Bakery**, introducing new high fiber breads. After conducting extensive research, the

company opted to use oat fiber as opposed to inulin. A study by the Glycemic Research Institute revealed that some people have passed out after consuming inulin.

## Raw:

Consumers have embraced the movement; branding, product offerings and packaging design are catching up.



- **Artisana**
- **Divine Organics**
- **SunFoods**
- **Raw Maker**
- **Kaia Foods** kale chips, fruit leather, and sprouted flavored sunflower seeds
- **Essential Living Foods**
- **Living Intentions**
- **Earthling Organics**
- **Rhythm Chips**, a new line of kale chips that are raw, vegan, non-GMO, and offer strong flavors, good packaging design and solid branding

## Influenced by the Raw Foods movement

Primary characteristics of Raw include lower manufacturing temperatures, sprouting, and simple core ingredients. Interestingly, Raw is beginning to influence products that are not considered raw:

- **Artisana** lightly roasted nut butters provide roasted flavor without totally nuking the ingredients, though temperature is not disclosed
- **TruRoots** sprouted quinoa, lentils and mung beans
- **Buenatural** tortillas features two SKUs that contain only corn, water, and a trace of lime

# Gluten Free

Don't expect a shortage of new item releases within gluten-free in the future: the segment is still in demand.

In fact, many companies are moving to further develop the arena by manufacturing products in dedicated gluten-free facilities, while continuing to support 3<sup>rd</sup> party certification and product testing. Gluten-free foods appeal not only to those with celiac disease or who are gluten intolerant, but also to those looking for alternatives to homogenized wheat.

These brands are Certified Gluten-Free:

- **Adina**
- **Republic of Tea**
- **Mareblu Naturals** (peanut free too!)
- **Pastariso**, also uses a gluten-free manufacturing facility

Many brands are developing gluten-free products within their lines:

- **Food for Life** new gluten-free English muffins
- **Kinnikinnick Foods** has a variety of gluten-free, dairy free, and nut free foods
- **King Arthur** baking mix line
- **Glutenfreeda** gluten-free granola and new gluten-free frozen burrito. All products are produced in dedicated gluten-free facility.
- **Dogswell** has a unique cross-contamination free manufacturing facility
- **Clean Cravings** crackers, pizza crust and pizza



# Agave:

Everywhere and in everything!



- **Suzie's** spelt puffed cakes
- **Sambazon** antioxidant elixir beverages
- **Luna and Larry's Coconut Bliss** vegan ice cream
- **Nature's Path** agave plus granola
- **Organic Valley** pre- and probiotic drinkable yogurt, sweetened with agave
- **Stash Tea** new organic agave nectar sticks
- **Simply Boulder** sauces, also vegan and certified gluten-free
- **Nature's Agave**
- **Agave Dream** ice cream and sorbet
- **Ojio** agave, focused on quality and terroir
- **VivAgave** organic agave inulin product, marketed as a powdered fiber product and for its pre/probiotic effects
- **Clean Cravings** gluten free pizza crust, sweetened with agave, also certified vegan

# Stevia

After the FDA's decision last year to allow Stevia extract of 95% Rebiana-A to be considered Generally Regarded As Safe (GRAS), confidence in the sweetener has heightened. With new offerings, particularly within beverages, Reb-A has expanded its position beyond that of a dietary supplement and found a place within the food and beverage world.

- **Hansen's** Blue Sky Free soda
- **O.N.E.** coconut water with added electrolytes and functional ingredients like ginseng
- **Taylor's Tonics** Chai Cola Light
- **Zevia** new flavor Dr. Zevia
- **Sambazon's** new diet version of their energy drink with a stevia and cane sugar blend
- **Tazo** ready-to-drink tea line

## *New Marketing Efforts and Packaging Design*

### Packaging Innovation or Eco Enhancements

Product packaging continues to feature unique shapes and designs, but is also focusing on better sustainability choices. As consumers continue to incorporate eco friendly packaging in their purchase decisions, manufacturers are taking the initiative to create sustainable packaging for their products. Developments within the Conventional world, such as SunChips' Biodegradable bag, place even greater importance on how the Natural Products Industry will respond and take lead in further advancement.

Questions of sourcing from non-GMO corn, for example, will likely begin to arise and become prevalent and will impact the need for our industry to further define sustainable packaging. Also, as ecological issues are examined, it may be found that products need to not only be biodegradable, but also compostable and that waste management companies integrate new programs to collect these materials. (i.e. the program started in San Francisco). Of course, post consumer materials will be big as well.

- **Artisana:** Squeeze packs for nut butters
- **Natures Path:** Newly designed, smaller box for cereals and eco packs (same amount of product inside). Their new Sunny Hemp Granola Bar is a bold move, incorporating a hemp leaf in its packaging design
- **Silver Hills Bakery:** Biodegradable bags for sliced bread
- **Rainbow Light:** 100% post consumer plastic bottles!
- **Zico:** Coconut water now in plastic bottles that are 30% post consumer
- **Green Genius:** First biodegradable zip storage bags
- **Stahlbush Island Farms** is transitioning their entire product line to be packaged in biodegradable packaging that is sourced from non-GMO crops!



# Strong Design, Re-Branding, or Enhancement

Packaging is also undergoing a movement towards cleaner, more intriguing designs that are less glossy and more thoughtfully and artistically crafted.



- **Taylor's Tonic:** This top shelf soda brand features branding and design that is reflective of its flavor and distinct quality. With a Stevia-sweetened soda at 5 calories, Taylor's Tonic was easily one of my top "Best of Show" choices.
- **Oogave**
- **Suzie's**
- **EatSmart Naturals**
- **Corazonas**

- **Stretch Island Fruit Co**
- **Hint Water**
- **Ojio** agave, maca, and other superfoods featuring fantastic packaging design
- **Nature's Path**
- **Barbara's Bakery**



## Co-Branding:

Natural companies are partnering up to bring us unique products.

- **Nicobella Organics** with **Theo Chocolate**
- **Sambazon** energy drink with **Guayaki** mate extract
- **Hansen's Blue Sky Free** sweetened with **Truvia**
- **Kaia Foods** kale chips with **Real Salt**
- **Twin Hens** chicken and veggie pot pies, using **Cascadian Farm** peas and carrots

## Natural and Organic Product Brands with Mainstream Media Support

Check out in which publications these natural brands are being featured.

- **Alter-Eco**, O magazine
- **SoCal Cleanse** organic cleansing items, Vogue, Marie Claire, InStyle, and more
- **Hain Celestial**, partnering with Martha Stewart to release a baking mix and a green household cleaning line
- **Popcorn Indiana**, Shape magazine

## Show Favorites



- **Taylor's Tonics:** Unique and original sodas such as Chai cola, Mate Mojito, Azteca Mocha, and a 5- cal Stevia version of their Chai cola!
- **Maca Magic:** Maca extract (tincture like, great flavor with a slightly bitter taste)
- **Cocohydro:** Instant coconut water that offers the nutritional benefits of the drink, but in an eco-friendly way since it is not packaged in plastic bottles.
- **Ajmera's** Coco Energy is a similar product. In light of the move away from bottled water, these products are noteworthy in that they serve their purpose without creating additional waste.
- **Big Tree Farms:** Coconut palm nectar and coconut granulated sweetener
- **Lammsbrau:** Organic beer that is environmentally sound, using solar and thermal energy along with recycled paper. Brew waste is used to grow mushrooms and the company fleet runs on bio fuels.
- **Shaman Chocolates:** Organic, fair trade and directly supports Huichol Indians
- **High Country Kombucha:** Available on tap, excellent flavor line.
- **Guayaki:** Endless varieties of ready-to-drink beverages for an energy boost
- **Numi:** The brand's ready-to-drink puerh teas set it apart in a crowded segment.
- **Rainbow Light:** Certified organic multivitamins and 100% post consumer plastic bottles

## New Products Featured at the Show

- **Sahale Snacks** biscotti crisps
- **Nutiva** raw coconut oil, centrifuged below 118
- **French Meadow Bakery** gluten-free pizza crust and frozen entrees
- **Ruth's Hemp Foods** chia goodness hot cereal, also gluten-free, fair trade
- **Explorer's Bounty** gluten-free crackers made with organic yuca
- **Living Intentions** raw granola