TOP 10 TRENDS FOR 2018
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From key nutrients (for people and pets alike) to special diets to sustainable innovations, SPINS industry experts forecast what will disrupt the retail marketplace in 2018.

**ADAPTOGENS**

**BY-PRODUCT PRODUCTS AND PASSING ON PLASTIC**

**CBD STIRS THE POT**

**COLLAGEN SHAPE-SHIFTS**

**ELEVATED INDULGENCE FOR PETS**

**FODMAP ON THE MAP**

**NOOTROPICS**

**PREBIOTICS ARE THE NEW PROBIOTICS**

**SELF-STARTING CERTIFICATIONS**

**SWEET TREATS TO GET YOUR PULSES RACING**

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ADAPTOGENS

The mind-body connection is a powerful concept, and consequently, stress is often considered a factor in illness. This notion has consumers seeking preventative measures to deal with everyday stressors, especially in this new age of self-care and for those seeking alternatives to pharmaceuticals. Loosely defined over half a century ago, the term *adaptogen* is characteristic of any substance that promotes resistance to stress. SPINS sees the relevance of stress-reducing ingredients increasing in the coming year, not just in herbal formulas but also in functional food and beverage applications.

In the food and beverage department, vehicles for adaptogens have primarily been in the form of functional beverages, such as kombucha or other drinks that market energy, mood, or immune support benefits. This has branched out to include functional coffee drinks, as well. Especially notable is the use of the adaptogen herb ashwagandha, which is featured in grab-n-go options such as Living Intentions’ Activated Superfood Popcorn and Blue Buddha’s Blueberry Rose Organic Wellness Tea. Medicinal mushrooms such as reishi and cordyceps have become successful in powdered supplement drink formulas, such as Four Sigmatic’s Adaptogen Blend, encouraging consumers to “keep calm and mushroom on.” We predict continued (and progressively innovative) applications of functional mushrooms across food, beverages, and dietary supplements, plus the integration of other ingredients that focus on adaptogenic properties. Ayurvedic adaptogens including amla (also known as gooseberry) and shilajit may also gain more recognition in 2018 for their history in traditional medicine and for research on their immune supportive benefits.
BY-PRODUCT PRODUCTS AND PASSING ON PLASTIC

While sustainability has always been essential to the Natural Products Industry, SPINS predicts that reducing and repurposing food waste will be a prime area of focus for 2018, along with replacing plastics from common household materials.

We’ve already seen several savvy innovations that upcycle less familiar parts of the coffee plant (such as the cherry and leaves) to create new markets and divert would-be waste, including cascara beverages, Coffee Flour’s nutrient-dense alternative to grain, and Wize Monkey’s coffee-leaf tea. Our team at Expo East loved the fresh flavor of Repurposed Pod’s cacao juice, pressed from the fruit around the better-known bean (which becomes chocolate). And from bars to barley milk drinks, companies such as ReGrained and Canvas – a startup with supply support from its parent company, Anheuser-Busch InBev – are getting creative with the spent-grain by-product of beer-making.

There’s a larger market cropping up for ugly produce, too, or the fruits and vegetables previously deemed unsuitable for retail for cosmetic reasons. Home-delivery service Imperfect Produce has expanded distribution from the West Coast into the Midwest. Dieffenbach’s launched Uglies kettle-cooked chips, taking pride in “rejected” potatoes, and Misfit Juicery brings zesty blends to market with a pledge to use at least 70% ugly produce. Our team is intrigued by KaroPRO fiber and others from the pulp of juiced vegetables from the Swiss FoodSolutionsTeam, an ingredient manufacturer focused specifically on the sustainable use of what it calls “sidestreams.”

SPINS expects this kind of consciousness to grow in household merchandise, too, with reusable and biodegradable food storage solutions like those from Beeswrap and Etee to replace plastics. In the same spirit, The Rice Way’s reusable travel mugs, made from husks of rice normally wasted in processing, will last for years in customers’ kitchens before biodegrading in nature. Even home pregnancy tests could go plastic-free: a discreet new design from Lia Diagnostics is both biodegradable and flushable.

As more brands innovate and more conscious consumers buy in, we’re keeping a close eye on waste-reducing tactics as a top trend for 2018.
The battle over the legality of cannabidiol, or CBD, will continue to be contentious in 2018 at both federal and state levels. This cannabinoid can be derived from both cannabis and hemp and does not offer the same euphoric effects as tetrahydrocannabinol (THC). By way of background, certain state universities and agricultural departments were allowed to grow hemp when Congress passed the 2014 Farm Bill, and while the Drug Enforcement Administration (DEA) continues to consider CBD an illegal marijuana extract, certain manufacturers are sidestepping the issue by deriving it from hemp, which is legal under the Farm Bill but not without its own challenges. (Also according to the Farm Bill, hemp plants must not exceed 0.3% THC by dry weight.)

All the while, manufacturers are moving right along with CBD and hemp product innovation – oft championed for their functional and medicinal properties – and these same manufacturers will plausibly continue to fight for their right to do so in the coming year. We predict that CBD and hemp products won’t clear off the shelves or vanish from the internet anytime soon. The application of these ingredients will be far-reaching, from food and beverage to supplements and powders to candy and gum to tinctures and beyond.

Supplements like the lineup from HempFusion offer cannabinoids to target digestive, sleep, and stress functions, while Earthshine Organics released sugar-free CBD chewing gum marketed for anxiety-relief in flavors like Winter Breeze and Raspberry Sorbet. KickBack Cold Brew brings CBD from Colorado hemp into the ready-to-drink beverage set with organic, shade-grown, single-origin coffee. We also peg hemp as a growing player in the protein powder space from brands like Victory Hemp Foods, growing hemp domestically in Kentucky, and in the sports nutrition arena specifically, with brands like Just Hemp Foods touting their hemp protein powder as plant-based and allergy-friendly.
Collagen is no stranger to the Natural Products Industry or lifestyle diet trends, as this animal-sourced, amino-acid-based protein was called out by SPINS last year as a functional ingredient in bone broth, skin care, and sports nutrition products. SPINS sees collagen leaping into new categories and products in 2018, marketed for various benefits to bones, joints, hair, skin, and nails.

Beyond supplements, gummies, and protein powders, collagen will increasingly augment new foods and beverages in the coming year. Primal Kitchen now makes a lineup of protein-packed bars featuring 8,500 milligrams of grass-fed bovine collagen in flavors like Chocolate Hazelnut and Dark Chocolate Almond, which the brand touts as offering more collagen than a cup of bone broth. Vital Proteins’ Collagen Creamers in Coconut, Gingerbread, and Vanilla flavors offer 10 grams of collagen peptides sourced from grass-fed, pasture-raised cattle. The creamers, though, are made with coconut milk, free of dairy and soy, and are suggested for use in coffee, tea, baked goods, and desserts.

In the beauty sphere, we wouldn’t be surprised to see more vegan products containing not animal-derived collagen but other formulations intended to produce a similar benefit or improve the body’s own collagen production. The new GENIUS Liquid Collagen from Algenist promises restored skin radiance and resilience with its formula of vegan plant collagen and microalgae oil beads. The brand creates plant collagen by binding together corn, soy, and wheat protein fibers, resulting in vegan amino acids that structurally mimic animal-derived collagen and act as its functional equivalent. Meanwhile, The Beauty Chef’s Collagen Inner Beauty Boost is a bio-fermented probiotic elixir, which the brand proffers to boost skin’s natural collagen production through its vegan blend of certified organic maqui berry, acai, papaya, blueberry, goji berry, and pomegranate powders, with grape seed extract, zinc, and vitamin C.
SPINS has been talking about clean-label and human-grade ingredient trends transforming the pet industry for some time now, but the specific space we think will change the most in 2018 is treats. We’re predicting a spike in better-for-you pet treats across the board: from a variety of functional claims and ingredients in packaged treats at pet stores and online, to freshly baked goodies going mainstream at standalone pet treat shops and food trucks.

Paralleling our prebiotic trend prediction for humans, we also expect to see more prebiotics (and prebiotics blended with probiotics) in pet treats in 2018. SPINS data shows that pet treats with prebiotics are a small but burgeoning market at $1.4 million dollars, growing at a rate of 31.6% this past year. The Bear & The Rat’s Bacon Peanut Butter Barker functional frozen yogurt for Fido packs probiotics in dog-friendly flavors like bacon, peanut butter, and pumpkin.

We’ll also look for more standalone retailers that specialize in freshly baked goods, handmade frozen desserts, and other scratch-made treats for pets, such as The Naked Dog Bistro and Pussy & Pooch in California. For a more niche and perhaps higher-income group of pet owners, the indulgence of their pets will even go beyond edible treats in the coming year and increasingly focus on yoga (“doga”), chiropractic care, and upscale spa treatments such as massage and reiki. When it comes to beloved furry family, pampering is a favorite pastime for many, and we expect to see this trend grow in 2018.

SPINSscan Natural and Specialty Gourmet (proprietary), SPINScan Conventional Multi Outlet (powered by IRI), 52 Weeks Ending 2017-Nov-05.
FODMAP ON THE MAP

FODMAP is an acronym for fermentable oligosaccharides, disaccharides, monosaccharides, and polyols. These are all short-chain carbohydrates and sugar alcohols that can cause digestive distress in some people. A low-FODMAP diet is a therapeutic diet commonly used for people with Irritable Bowel Syndrome (IBS) and other Functional Gastrointestinal Disorders (FGID). There is some research exploring the use of a low-FODMAP diet for people with Non-Celiac Gluten-Sensitivity (NCGS), as well. With a few brands already on our radar, we expect to see low-FODMAP foods gain greater traction in the marketplace in 2018.

The **FODY Food Co.** has an extensive line of seasonings, condiments, soup bases, bars, cereals, trail mixes, chips, and more that are certified low-FODMAP. The company is helmed by the co-founder and former CEO of **Glutino**, a brand that helped increase the reach and accessibility of gluten-free foods. **FODMAPped for You!** offers pasta sauces, soups, stocks, and simmer sauces as well as recipes to help make home-cooked meals on a low-FODMAP diet. In its line of seasoning blends suitable for special diets, **Paleo Powder Seasoning** makes a versatile FODMAP-friendly seasoning without hard-to-absorb ingredients like onion or garlic. It’s also gluten-free and does not contain MSG or sugar.

In the age of transparency, we expect to see a rise in low-FODMAP certifications. Monash University in Australia coined the term FODMAP, has done extensive research into the FODMAP diet, and offers the **Monash University Low FODMAP Certified** seal as well as an app that allows people to easily find suitable products for the diet. Another notable certification that recently entered the marketplace is **FODMAP Friendly**, also from Australia. SPINS expects seals like these will help consumers locate more low-FODMAP foods on U.S. shelves in the near future.
Nootropic, a term to describe agents that enhance cognition or support mental calm and clarity, is becoming more prevalent in industry news and ingredient marketing in supplements. Made popular by the Bulletproof diet, nootropic products encourage getting in tune with one’s own biology (or biohacking) to upgrade performance of the body and mind. They also tie in concepts of self-care for prevention and treatment. Brain supplements and herbal adaptogens come into play for managing stress, cognition, sleep, and aging. Take, for instance, Jubi’s Tropical Punch nootropic, promoting increased focus, motivation, and stress relief on the front of the label.

Many adaptogenic herbs are considered natural nootropics, including ashwagandha, bacopa, and ginkgo biloba. Amino acids are also a big component of nootropic formulations, such as L-Theanine, marketed to promote mental relaxation without sedation. In sports nutrition, nootropic often describes pre-workout formulas for energy and focus, such as Garden of Life’s Sport Organic Plant-Based Energy + Focus pre-workout supplement. The booming popularity of the ketogenic diet will likely continue to increase attention on nootropics, too. On this diet, medium-chain triglycerides (MCTs) are lauded as a premier source of energy from fat. Even for brands whose primary products aren’t keto, we’re seeing new line extensions to meet this growing body of consumers. We’ve noticed a specific rise of MCTs in sports nutrition products, such as Finaflex PX Ketoburn, marketed to help enhance performance.

One trend we expect to see more of this year is herbal formulations that contain other trending functional ingredients with similar physiological benefits. Think turmeric paired with black seed oil or herbal adaptogen/nootropics paired with neuro-supportive amino acids. SPINS expects that nootropics will continue to grow in mainstream popularity in 2018 with a variety of innovative ingredient combinations.
Digestive health has been a growing trend for the last several years. Consumers are more knowledgeable and comfortable talking about gut health, and we have certainly seen a proliferation of probiotics in the marketplace. In 2018, we predict prebiotics, which nourish the intestinal flora to keep the digestive system running smoothly, will feature more prominently in consumer conversation. While prebiotics are often bundled with probiotics, SPINS researchers are seeing more prebiotics called out on their own in certain categories around the grocery store.

In the hot cereal segment, one of our favorite prebiotic finds is Peak Sherpa Himalayan-Style Tsampa Barley Cereal. Made with Himalayan sea salt and certified organic, non-GMO, sprouted, roasted barley, tsampa is a versatile ready-to-eat cereal that can be enjoyed hot or cold. Plus, tsampa is a high-fiber, low-fat, resistant-starch prebiotic with plant-based protein. Peak Sherpa is a Washington State Social Purpose Corporation and a pending Certified B Corporation organization.

More and more, we see prebiotics popping up in the bar segment. One innovative example comes from the DNX (Daily Nutrition Excellent Taste) brand. These bars are made of meat with no added hormones or antibiotics, plus organic fruits and vegetables, and no added sugar, artificial preservatives, dairy, or GMOs. Each gluten-free, low-sodium bar is a nutritional source of prebiotics from organic inulin, and the bars contain other ingredients of note like organic moringa and sacha inchi.

As more shoppers seek sources of prebiotics, we’ve got our eye on tiger nuts as a versatile source across food and beverage categories. Not actually nuts but small tubers, tiger nuts are a versatile ingredient for a wide range of applications. Known to many as the basis of the traditional Spanish horchata beverage, tiger nuts can also be ground into an alternative flour, pressed into a cooking oil, or eaten simply as a salad topper or snack. Naturally gluten-free and Paleo-friendly, tiger nuts show strong potential to become more popular in 2018. We’re watching brands like Organic Gemini and Tiger Nuts USA for new value-added line extensions, and we wouldn’t be surprised to see more brands enter the market in the year ahead.

In terms of supplements, Prebio Thrive formulates with five organic prebiotic ingredients – acacia gum, agave inulin, flaxseed, galacto-oligosaccharides, and guar gum. Each scoopful is stirred into a beverage of choice, but the brand recommends enjoying it with a probiotic drink to create a synbiotic, or synergistic, effect. The term synbiotic is not in the common vernacular just yet, but we think we might see it more frequently in 2018 on products with complementary pre- and probiotics.
SELF-STARTING CERTIFICATIONS

The Natural Products Industry is no stranger to self-propelled evolution, setting and raising the standard for authenticity, environmental impact, quality, and transparency across categories. SPINS is keeping its eye on new label claims and third-party certifications emerging from this drive for better in 2018, particularly the following three areas of interest.

Glyphosate, a prominent herbicide that’s well known to be the key ingredient in Monsanto’s RoundUp, was classified by the World Health Organization’s International Agency for Research on Cancer as “probably carcinogenic to humans” in 2015. Numerous developments have kept the herbicide in the headlines, including disputation of the IARC’s findings, on one side of the debate, and California’s Office of Environmental Health Hazard Assessment effectively listing glyphosate as a carcinogen in July 2017, on the other. Outside the U.S., the European Union voted to allow continued glyphosate use for five years in November 2017. (Although following this decision, French president Emmanuel Macron called for his country to ban the chemical within the next three years.)

The controversial chemical has become a household name for many consumers who seek to avoid it, and SPINS saw two certifications emerge last year from The Detox Project and BioChecked to help shoppers steer clear. We predict the rise of glyphosate-free and glyphosate-residue-free language on labels as well as the adoption of third-party verification by a growing number of brands in 2018.

Another industry-led certification to watch in 2018 is the Regenerative Organic Certification, created by the Rodale Institute and administered by NSF International with support from a variety of leading brands. The new label espouses the principles of the USDA organic certification, but its focus also extends beyond farming inputs to improving conditions in three major arenas: soil health, social fairness, and animal welfare.

Last but not least, SPINS will keep its eye on the Certified Grass-Fed Organic program, led by Maple Hill Creamery and Organic Valley brands and administered by Earth Claims, LLC. The new certification, like the Certified Grassfed standards of the American Grassfed Association (AGA) before it, aims to protect the integrity of grass-fed claims in the absence of strict federal regulation. While AGA launched its certification at Expo West 2017, the Certified Grass-Fed Organic program is set to roll out at Expo West 2018, adding a foundational requirement of organic certification to its parameters for forage diets and living conditions. Many industry hands have helped shape developments on this topic, including the Northeast Organic Farming Association of New York (NOFA-NY) and Pennsylvania Certified Organic (PCO), underlining the importance of the issue to numerous committed stakeholders in the Natural Products Industry. SPINS forecasts that these industry-led initiatives will take root and flourish in the year ahead.
The Food & Agriculture Organization (FAO) of the United Nations declared 2016 the International Year of Pulses (referring to the dried seed of a legume, such as a bean or lentil), and in 2017 we saw several savory iterations of these nutritional powerhouses in new categories. In 2018, SPINS expects to see additional intriguing applications of these ingredients: pulses that satisfy our sweet tooth.

What have we seen so far? **Biena** recently expanded its snack line to sweet flavors. The brand’s chocolate-covered chickpeas offer 4 grams of fiber per serving along with a plant-based protein punch. These gluten-free, vegetarian gems are also non-GMO and feature fair-trade chocolate in three flavors: dark chocolate, milk chocolate, and salted caramel. Spotted at the Sweets & Snacks Expo and highlighted among SPINS’ summer snacking trends, **Lebby** offers a gluten-free, kosher, non-GMO, and vegan assortment of sweet chickpeas with 5 grams of fiber and 6 grams of protein, as well, in flavors like Cinnamon Crunch, Dark Chocolate, and Sesame Honey. Bean-based snack pioneers at **Beanitos** are paving the way for more sweet pulses in the snack aisle, too, with the brand’s recent foray into flavors like Cinnamon and Salted Caramel. The new crunchy white-bean twists are also Certified Gluten-Free by the Gluten-Free Certification Organization (GFCO) and verified by the Non-GMO Project.

Crossing categories, **Delighted By Hummus** offers unusual hummus flavors like Brownie Batter, Choc-o-Mint, Snickerdoodle, and Vanilla Bean, blending chickpeas with creamy, rich ingredients like coconut milk and coconut oil, and sweeteners like coconut sugar and organic turbinado sugar. With a variety of serving suggestions, such as fruit, graham crackers, pita chips, pretzels, and toast, these treats are also labeled gluten-free, non-GMO, and vegan.

What’s next for pulses in 2018? We wouldn’t be surprised to see beans in baked goods like brownies and cookies or in other portable, snackable options like bars.
Did you enjoy your taste of the trends ahead in 2018?
Register today for our webinar on Thursday, February 1, for more insights on these trends and a preview into what we’re watching for at Expo West 2018.

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