



2023 Health & Wellness Trend Predictions



SPINS Sustainability Data Trends

Labels and Certifications are not only useful and necessary but help set an industry wide standard for defining sustainability and what to look for on shelf.



+6% | \$38B

Certified Non-GMO

+6% | \$17B

Certified Organic

+5% | \$12B

Certified B Corp

+3% | 813M

Certified Plant Based Foods

+2% | \$426M

Certified Marine Stewardship Council

+21% | \$25M

Certified Upcycled

Upcycled Gaining Traction

Using upcycled ingredient sources adds innovation opportunities across an increasing number of categories that capitalize on once discarded food sources as a solution to mitigate negative climate impacts.



Dollar Sales
\$30M

YoY Growth
+21.0%

Categories where Upcycled Certified is showing growth

Category	%growth YoY
Frozen Desserts	+9.5%
SS Fruits & Vegetables	+44.0%
Pet Treats	+86.5%
SS Fruit Spreads & Jams & Jellies	+3,740.0%
SS Chips, Pretzels & Snacks	+27.1%
Refrigerated Plant Based Milk	+99.4%
FZ & RF Meats, Poultry & Seafood	+409.7%
SS Nuts & Trail Mix & Dried Fruit	+6.6%
SS Baking Mix & Ingredients & Flour	+220.7%



Sustainability through packaging

Single serve beverages pivot towards easier recycling options

Pod & Cup systems have been criticized for being impossible to recycle, ultimately end up in public landfills and other bottled beverages are switching from glass and plastic to aluminum and other metals which is easier to recycle and reuse.



Pod/Cup System -
Recyclable:
+18%

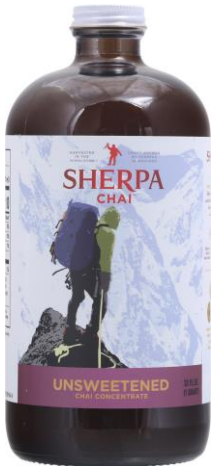


Pod/Cup
System:
-10%

Shelf Stable &
Refrigerated Beverages
+10%



Bottle –
Aluminum:
+28%



Bottle –
Glass:
-18%

Centered on Nutrition

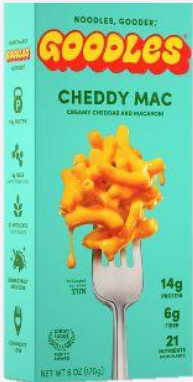
Shoppers will find extra value and invest in products that innovate with BFY nutrient profiles

LOW CARB (KETO FRIENDLY)

Category Examples	YoY Growth
Cold Cereals	+46.6%
Yogurt	+32.7%
Bread & Baked Goods	+21.1%

PROTEIN PACKED (20+G)

Category Examples	YoY Growth
Cold Cereals	+882.8%
Cookies & Snack Bars	+589.1%
FZ Plant-Based Meats	+45.4%



Elevated **micronutrient** profiles sourced from a range of superfoods continue to leave an impression on shoppers across a wide range categories.



Nutrition basics such as Whole grains and a focus on clean label ingredient profiles will be a feature tenant as established brands look to expand their footprint

Return to Paleo

Grain free products continue to show strong growth buoyed by younger shoppers looking to decrease consumption based on diet preferences, product innovation, and a wider presence when dining out.

Certifications

Category Examples	YoY Growth
Certified Whole Grains Council	+1.3%
Certified Paleo	+16.6%
Certified Paleo Foundation - Grain Free	+16.3%

Label Based Claims

Category Examples	YoY Growth
Gluten Free	+8.1%
Paleo Positioned	+18.6%
Grain Free	+15.9%
Allergy Friendly	+7.9%
Ancient Grains	+12.3%



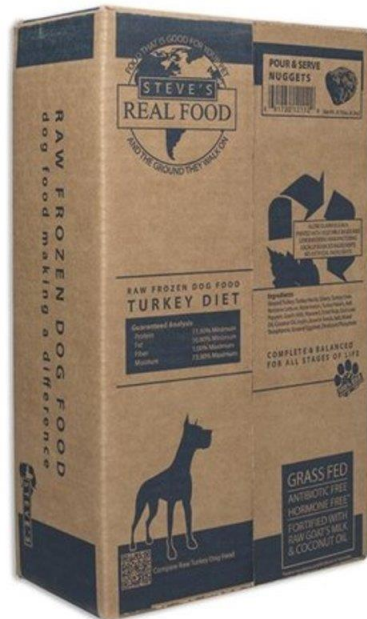
Pairing global flavors with Certified Paleo ingredients and protein without added antibiotics provides a **Refrigerated Entrée** capitalizing on current consumer preferences



Certified Paleo and Keto, Whole 30 diet, zero sugar, with 7g of protein without added antibiotics for this **SS Jerky & Meat Snack** show how layering multiple attributes appeals to a larger segment of shoppers

Pet Stores expand their offerings

Fresh and clean labels come key drivers in pet store foot traffic



Frozen



Fresh



Plant Based

The Future of Meat & Poultry

Where's The Beef?



Winner, Winner



Value Plays



KEY TREND: Animal Free Dairy



‘NEXT GEN’ INGREDIENTS ARE CATEGORY DISRUPTORS

Derived through precision fermentation, animal free dairy proteins are considered a sustainable alternative to animal derived milk proteins

Poised for broader proliferation across categories.

Identical to animal derived milk proteins and must be labeled as a milk allergen

SPINS Attribute “Ingredient – Non Animal Dairy Protein” will allow for trend tracking beginning P12 2022.

Beauty: Not Always So Beautiful

% Of Shoppers Believe
Personal Care Products
Are Unsafe

59%



Number Of FDA
Chemically Prohibited
Ingredients

11



Number Of Plastic
Cosmetic Packaging Units
Produced Each Year

120 Billion



% Of Worldwide
Industry That Allows
Animal Testing

80%



Social Media – Quick Pivots

Social media is no longer limited to Gen Z and Millennials looking for How To's on the latest personal care trends. In fact, a recent study by Harvard Business School found that 62% of women follow beauty influencers on social media. With trends changing faster than data can predict or keep up – what could be in store for 2023?

2022'S Biggest Trends

1. Retinol \$ -4% | Units -1%
2. Skincare
3. DIY Skincare
4. Customizable beauty
5. Hyaluronic Acid \$ +11% | Units +1%



What's Next For 2023?

1. #cleanlook
2. Celebrating Sustainable & Clean Products
3. Skincare
4. Bakuchiol \$ +33% | Units +23%
5. Algae & Sea Fennel \$ +17% | Units +16%



Thank you!

We'd love to hear from you. **Get in touch:**



Scott Dicker

Senior Market Insights Analyst, SPINS
sdicker@spins.com



Jessica Maniscalco

Senior Retail Insights Manager, SPINS
jmaniscalco@spins.com



Jeff Crumpton

Retail Product Marketing Manager, SPINS
jcrumpton@spins.com



Jake Knepper

Sr. Data Analyst – PI Strategy & Solutions,
SPINS
jknepper@spins.com

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