

EXPLORE THE  
**TRENDS +**  
**TREASURES**  
AT EXPO WEST '24



PRESENTED BY LEADERS FROM:



**SPINS**<sup>®</sup>

**MOXIE SOZO**<sup>®</sup>

# YOUR EXPERT GUIDES TO EXPO WEST '24

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We bring a holistic approach to food and beverage development, utilizing our decades of cross-category experience to deliver a bespoke, end-to-end solution.

We combine trend forecasting, market insights, and product development to create successful products driven by strategy, innovation, and insights.

It's this approach that's enabled us to create one-of-a-kind products over our 45+ years in the innovation business.



SPINS connects shopper values to product innovation by combining POS data from conventional, eCommerce, and natural channels with deep product knowledge. By translating product data into attributes, we ensure retailers, brands, and partners know as much about the products they create, stock, and sell as the shoppers that buy them. These attributes create a common language that enables ecosystem growth.



For 25 years, Moxie Sozo has partnered with brands of all sizes that are ready to act rather than react. Our extensive approach to brand building empowers bold decisions that embrace both beauty and effectiveness to reach business goals, capturing consumers' attention in increasingly competitive buying environments.



01

## Food Rx

The Food as Medicine trend prioritizes healthspan over lifespan, driving demand for functional foods targeting specific health needs like blood sugar management and cognitive enhancement, highlighting the link between diet and mental well-being.



02

## Manifeasting Mushrooms

Mushrooms, prized for health and eco-benefits, are surging in popularity. Functional types offer cognitive boosts, while others enhance texture in plant-based foods. Mushroom cultivation's sustainability aligns with conscious consumers' preferences for eco-friendly ingredients.



03

## Carbon Foodprint

The global food system is responsible for 30% of the world's greenhouse gas emissions. Using whole plants and upcycling food ingredients cuts emissions and reduces waste while innovative packaging helps align profitability with environmental stewardship, offering consumers products that are sustainable, innovative, and delicious.



04

## Regenerative Revitalization

Regenerative agriculture emerges as the new standard, offering benefits for consumers, farmers, and the environment. By focusing on soil health and biodiversity, it yields nutrient-dense foods, mitigates climate change through carbon sequestration, and promotes safer working conditions by reducing chemical use.



05

## Gen Z Tastes On Tour

Gen Z's culinary exploration expands with a focus on global flavors, like rising popularity of flavors inspired by Latin American, African, and Asian countries. Rising interest in sauces and condiments offers a low entry cost for consumers to experience authentic tastes, fostering inclusive diets like the Blue Zones and Mediterranean diets, promoting health and cultural appreciation.

# 01

## Food Rx



01

## Food Rx

The Food as Medicine movement is making its mark across a swath of food and beverage categories. Consumers (and not just the old ones) are evolving their perspective on aging, from seeking merely a longer lifespan to ensuring a high quality healthspan free of health issues. It's driving a growing preference for food and beverage products that not only fuel our bodies but also offer functional benefits grounded in science to improve health, beauty, and vitality.

This shift is evident in products that are designed to help manage blood sugar levels, contain functional ingredients like probiotics, or are tailored for specific health benefits like immune support, skin or digestive health.

There is also an increasing focus on cognitive acuity, reducing stress and mood-enhancing food and beverages. Products in this category often include ingredients known for their mental health benefits, such as adaptogens and nootropics. This trend reflects a growing understanding of the interplay between diet and mental well-being.



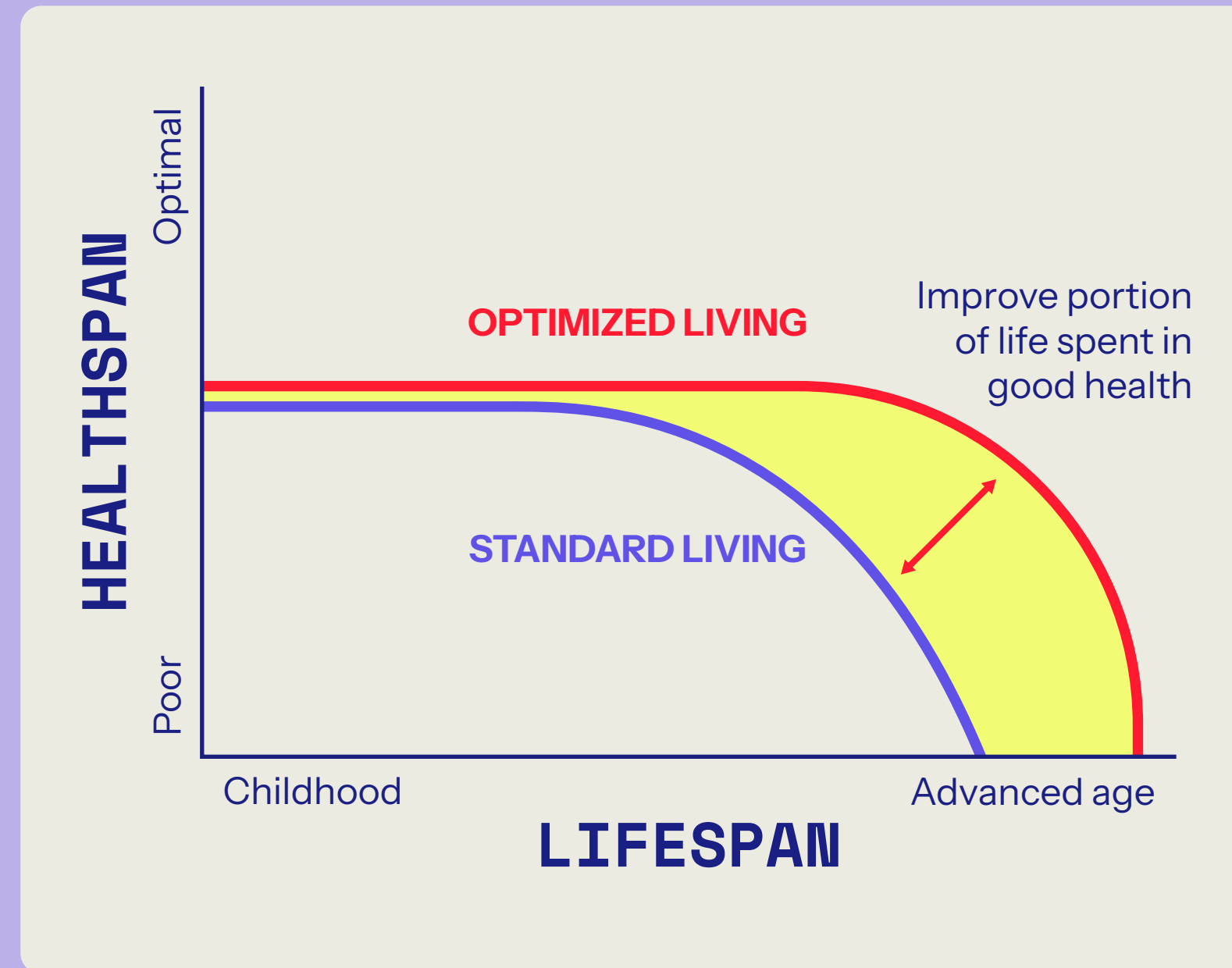
# WHAT IS HEALTHSPAN?

While lifespan is the total number of years someone lives, **healthspan is the years someone lives in good health—free from disease or serious illnesses.** The focus is the quality, not quantity, of life.



**TREASURE INSIGHT**  
Today we live up to **20% of our lives unhealthy.** The average lifespan in the United States is 79 years, while the average healthspan is only 63 years.

## THE LONGEVITY CURVE IMPROVING HEALTHSPAN



# WHAT IS HEALTH-HACKING?

Health-hacking is the idea of enhancing the human experience through diet and lifestyle.

**Participating in elimination diets** like Whole30 or intermittent fasting.

**Focusing on sleep and relaxation,** not more, but better.

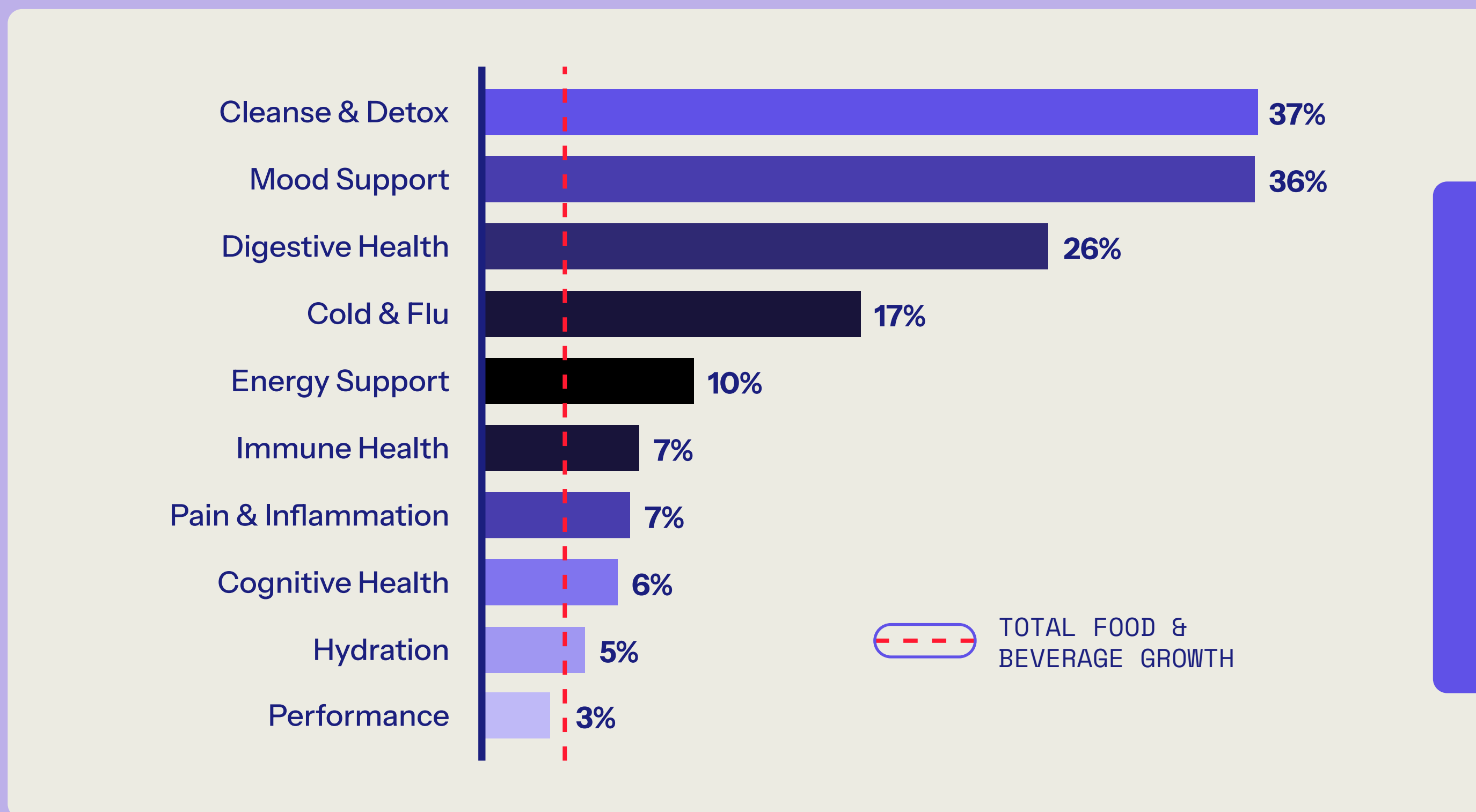
**Using nootropics** like caffeine, terpenes, Curcumin, and Ashwagandha.

SPINS Health Focus attribute identifies a primary health condition for which a product is marketed.

Products with purported benefits are gaining share across food and beverage as consumers seek holistic health.

## TOP 10 FASTEST GROWING HEALTH FOCUS ACROSS BEVERAGE

DOLLAR % CHANGE



**TREASURE INSIGHT**

Fastest growing functional ingredients include Beetroot, Wheat Grass, Barbery and Vitamin A.

Wellness Shots continue to innovate on health focus while Digestive Health is being driven by probiotic laden sodas.

**TREASURE TIP**

Watch for which functional ingredients are being leveraged by brands to support their health claims.

Source: SPINS Health Focus Attribute. Dollar % Change across Beverage Departments. SPINS Satori. 52 Weeks ending 12.31.2023. Total US- MULO + Natural Channel.

## SOME GEN Z-ERS ARE SEEKING TO IMPROVE THEIR RELATIONSHIP WITH FOOD

### GEN Z & FOOD



**BELIEVE THAT THEIR EATING PATTERNS ARE “WRONG.”**

More likely than other generations to say that food makes them feel guilty, anxious, uncomfortable, and stressed

The least likely generation to say that they have a positive relationship with food

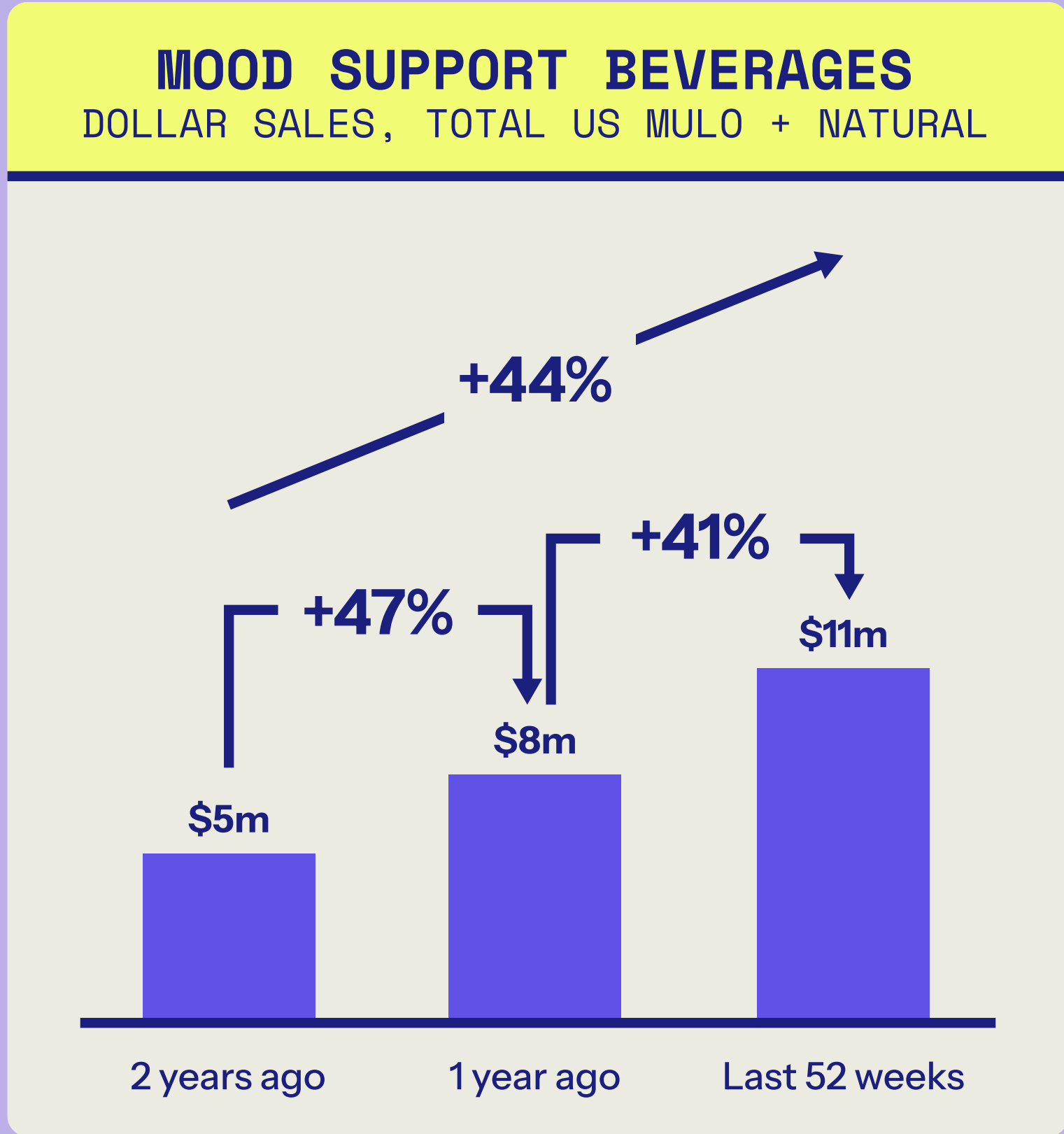
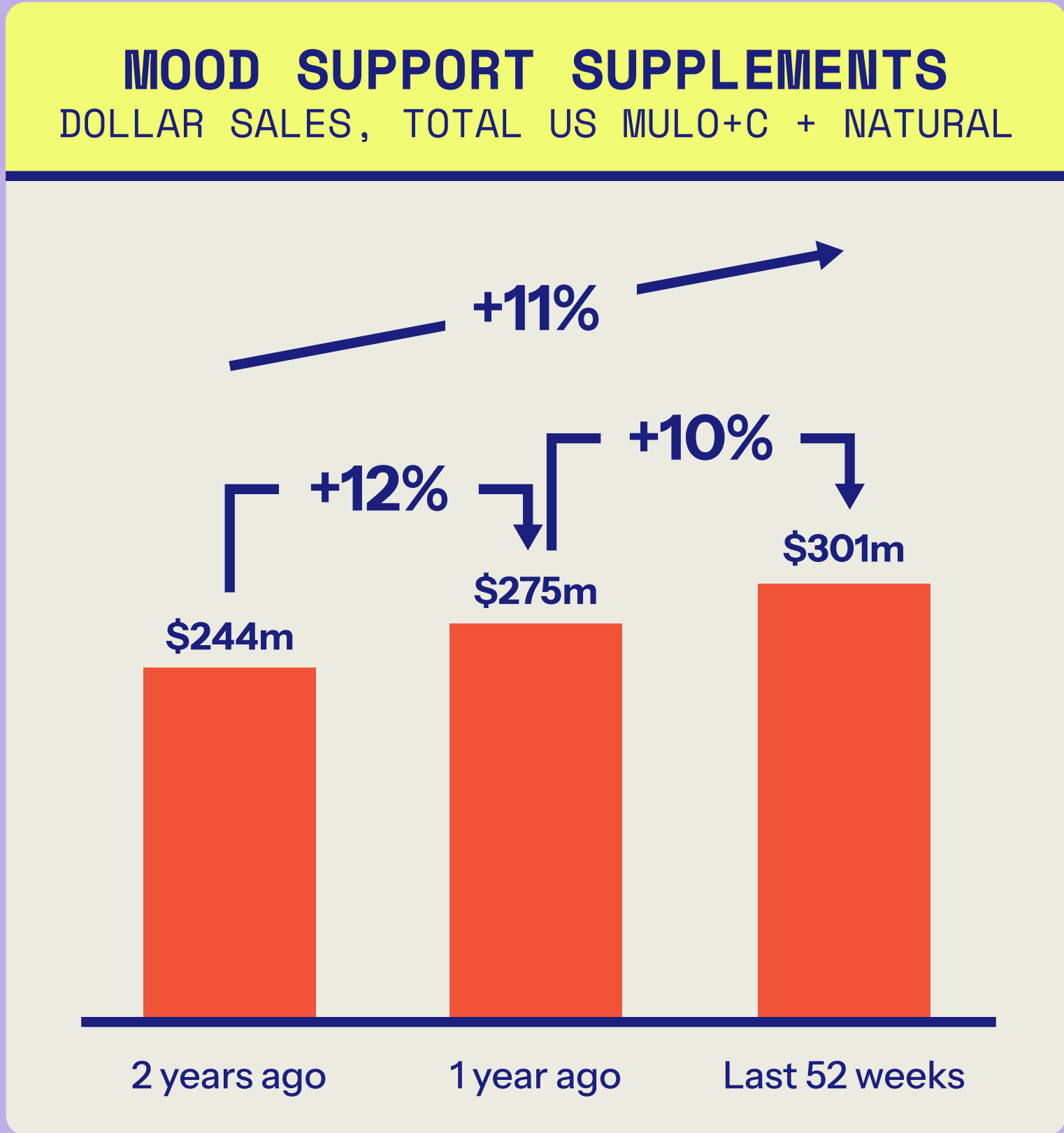
### TOP 4 BENEFITS SOUGHT BY GENERATION

GEN Z	MILLENNIAL	GEN X	BOOMER
<b>40%</b> Energy/less fatigue	<b>42%</b> Energy/less fatigue	<b>40%</b> Energy/less fatigue	<b>44%</b> Healthy aging
<b>34%</b> Weight loss + management	<b>38%</b> Weight loss + management	<b>39%</b> Weight loss + management	<b>40%</b> Weight loss + management
<b>33%</b> Emotional + mental health	<b>32%</b> Emotional + mental health	<b>35%</b> Healthy aging	<b>38%</b> Heart + cardiovascular health
<b>31%</b> Muscle health/ strength + endurance	<b>32%</b> Digestive health + gut health	<b>33%</b> Heart + cardiovascular health	<b>38%</b> Energy/less fatigue



# NEXT FUNCTIONAL BEVERAGE DISRUPTION WAVE FROM VMS TO BEVERAGE

## MOOD SUPPORT



The **Health Focus** positioning attribute identifies a primary health condition a product is marketed for, based on label claims and intended use. **Mood Support** refers to supplements marketed for anxiety, depression, and stress (excludes sleep).

Source: SPINScan; Total US — Natural + Total US — MULO + C (powered by Circana), VMS Department, Soda Category Health Focus — Mood Support, Data Ending 10/08/23



**Timeline Nutrition** (4218)

Crafted with scientific precision and packaging devoid of unnecessary marketing jargon, these products offer simplicity and efficacy. Timeline does not shy away from scientific terms like mitochondrial, indicating their desire to connect consumers with scientific innovation.



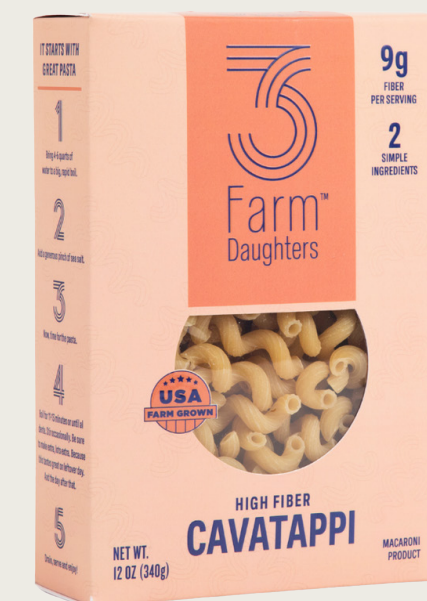
**Mixhers** (N1647)

The brand name Mixhers speaks volumes, targeting their consumer base directly with products like hertime, herbaby, and herdigest. Iconic functional callouts add to Mixher's clarity in quickly communicating to its consumer.



**Recess** (5789)

Recess prioritizes mood-enhancing benefits, placing its "mood" function at the top of its hierarchy. Its visual identity supports its claims with calming, monochromatic sunset-inspired designs that aim to cultivate a zen-like mindset for the consumer.



**3 Farm Daughters** (N245)

3 Farm Daughters' pasta boasts just two simple ingredients yet packs a punch with benefits, including 9g of fiber, offering both simplicity and nutrition.

**Chewsy** (N2310)

This is unlike any vitamin you've experienced—neither a pill nor a gummy. Chewsy engages consumers with color cues that reflect the hierarchy of ingredient profiles, ensuring transparency and connection.



**Brain Juice** (N817)

With BrainJuice, the benefits are front and center, positioned right above the logo for easy recognition. Its functional ingredients are included lower in the overall hierarchy, creating an educational moment that connects beyond function.



**Poppi** (5689)

Poppi introduces visual vibrancy with its deliberate colorful selections, highlighting significant flavor cues. Its name implies it's more than just soda—it's a healthier better-for-you pop alternative.



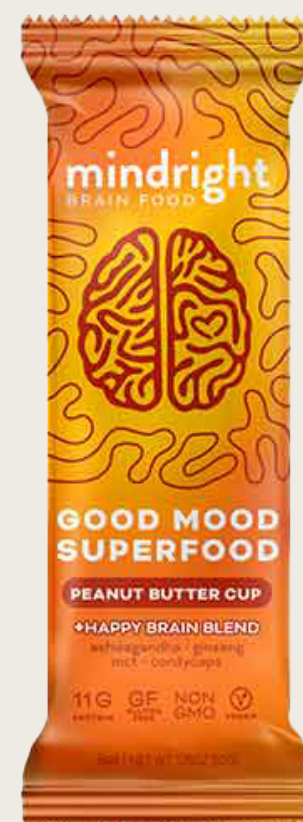
**MOSS** (8204)

For centuries, marine plants have been cherished for their medicinal benefits, renowned for restoring balance. Moss's visual identity reflects the tranquility of the ocean with a harmoniously clean design aesthetic.



**Mindright** (N2213)

The name Mindright perfectly aligns with the benefits of these protein bars infused with superfoods. Their monochromatic packaging and visual cues provide a bright backdrop to the key attribute in its hierarchy, its "Good Mood Superfood" claim.



**Local Weather** (5248)

Local Weather's vibrant color cues and dynamic illustrations catch the eye, while its minimalist design emphasizes its identity as a cleaner, more functional, sports drink.



**Moment** (5499)

Moment's adaptogen drink designs are minimalistic, straightforward, and devoid of any excess. With an aura-esque color scheme, they evoke the sense of calmness they offer the consumer.



**Nirvana Super** (N2129)

Nirvana embodies serenity, while Super denotes excellence, prioritizing its mention in the messaging hierarchy while also meticulously highlighting their functional ingredients, including their multi-patented myHMB® Clear formulation.

**Rootine** (8920)

Rootine leaves no room for ambiguity with its clear visual hierarchy, highlighting the product's benefits effortlessly while also listing the specifics of its adaptogenic ingredients. The simplicity and flavor-forward visuals make understanding Rootine a breeze.

When food is medicine, benefits take precedence over flavor profiles, emphasizing the question, “How does this product help my personal well-being?”



# FUNCTION ISN'T BORING

While function-forward foods want to claim their efficacy, they want to avoid looking like actual medicine. The best brands engage the mind with vibrant color cues spanning the rainbow, clearly indicating that while their offering is function-forward, it's anything but boring.

# CALL IT WHAT IT IS

Brands like Brain Juice, Mind Right, and Moment use the key features in their hierarchy and name, to ensure that consumers cannot miss the product's benefits.

02

Manifeasting  
Mushrooms



# Manifeasting Mushrooms

Mushrooms of all sorts are manifesting across the aisles, driven by both health and environmental factors. The use of functional mushrooms, such as reishi and lion's mane, is gaining popularity in beverages, snacks, and supplements due to their reputed health and lifestyle benefits – offering a range of advantages, including cognitive enhancement, stress reduction, and immune system support.

In other foods, the properties of mycelium, the root-like structure of mushrooms, are being leveraged for their texture, bite, and protein content. This is particularly significant in plant-based and alternative protein products.

The environmental sustainability of cultivating mushrooms, notably their low water and land use, and resulting small carbon footprint, positions them as an eco-friendly ingredient choice, aligning with growing consumer demand for sustainable food options.

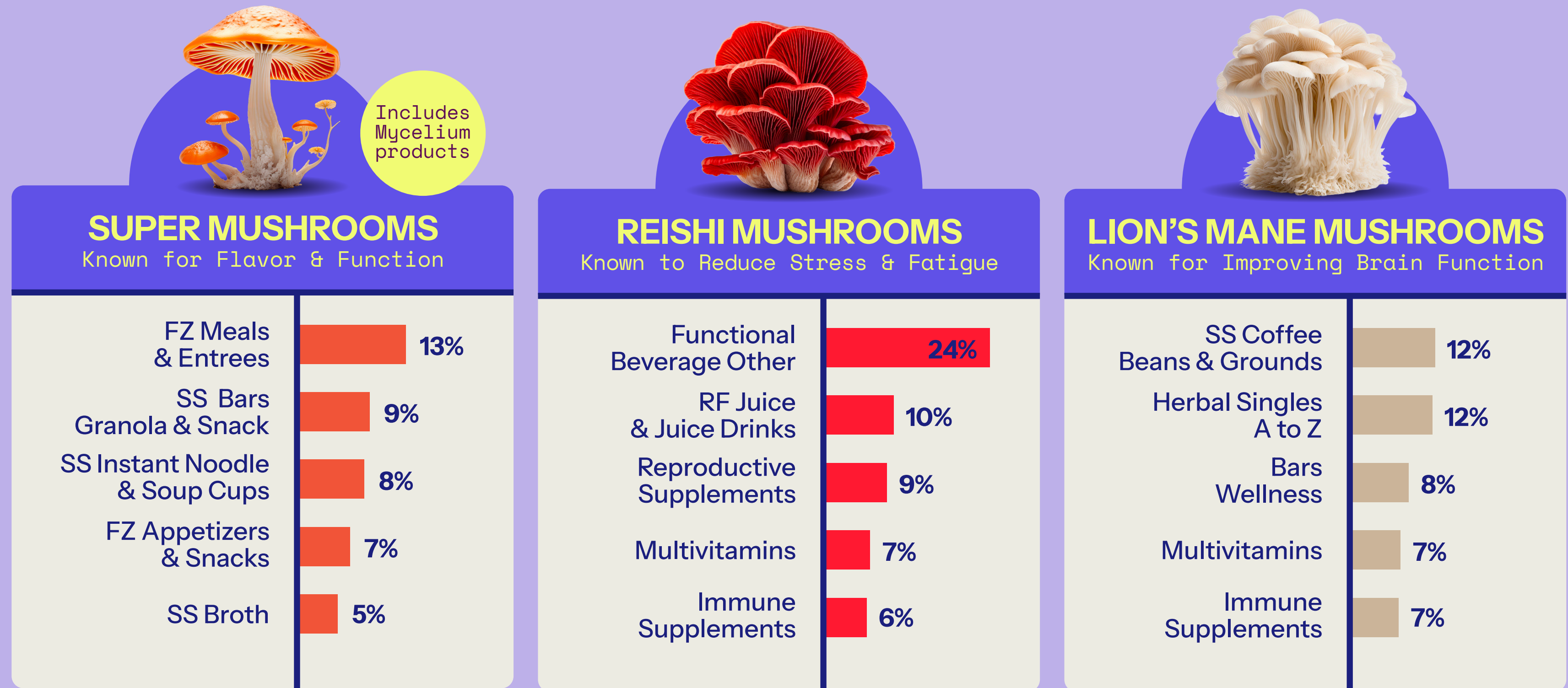
02



SPINS Ingredient Attribute enables identification of product prevalence across differing types of mushrooms.

Mushrooms long used for flavor and foundational ingredients are increasingly being incorporated into formulations for functionality.

## TOP 5 LARGEST CATEGORIES FOR EACH MUSHROOM TYPE



Source: Subcategory Dollar Share of SPINS INGREDIENT - SUPER MUSHROOMS, INGREDIENT - MUSHROOM REISHI and INGREDIENT - MUSHROOM LIONS MANE across Grocery, Refrigerated and Vitamins & Minerals Departments. SPINS Satori. 52 Weeks ending 12.31.2023. Total US- MULO + Natural Channel.

**TREASURE TIP**

Watch for which day-part need products with mushrooms are intended to fulfill.

**Everyday Dose** (N2006)

Everyday Dose leans into mushrooms' sometimes countercultural reputation with its brand name, visual identity, and communications hierarchy. Mushrooms receive top billing on-pack.



**Shroomeats**

4199A | Hall D

Shroomeats relies heavily on photography to signal mushrooms' ability to mimic the texture (and presumably, taste) of meatballs while making no mystery of its hero ingredient.



**MyForest Foods** (N1123)

MyBacon puts the focus on its farm-fresh, kraft-heavy visual identity and its animal-free, gluten-free, dairy-free, soy-free attributes. By the time mushrooms first appear in its hierarchy, MyBacon has made a strong case for its use as a meat substitute.

**Om Mushroom Superfood** (1441)

Suggesting its growing acceptance among supplement consumers, Om calls out its Lion's Mane varietal first, placing it above mushroom and functional benefits in its packaging hierarchy.



**Odyssey Elixir** (5469)

As a functional beverage, Odyssey calls out its mushroom ingredient most prominently, followed by functional benefits. Paired with strong brand cues, it offers an approachable entrypoint into the ingredient trend.



**Three Spirit** (N2301)

Non-alc beverage Three Spirit doesn't mention its mushroom ingredient profile, instead leaning on brand-forward visuals and functional effects for a sophisticated libation.



**Meati** (4981)

Meati does a great job of keeping it simple. The brand blocks well with its flood of orange. Without overpromising, they lead with the brand name and taste appeal, before finding what the product is made with and its benefits.



**Wise Bar** (N2109)

Wise Bar also eschews mentioning mushrooms on its front-of-pack, instead calling out function and varietal, signaling its expectation that consumers are quite familiar with the trend.



**Deux** (N1909)

As an indulgent alternative to raw cookie dough, Deux doesn't let its mushroom-based formulation get in the way of its pursuit of taste appeal — mushrooms appear nowhere front-of-pack.



**Space Tea** (1760)

While Space Tea's visual identity includes mushroom illustrations and mentions them as a key ingredient, its brand-forward approach puts interest and flavor ahead of the mushrooms themselves.



**Holi Scoops** (N2316)

Meanwhile, Holi Scoops does not mention its mushroom ingredients at all on the front-of-pack. Instead it relies on brand personality and visuals to convey functional benefits to position itself as a smart choice with consumers.

Overall, the mushroom trend has established itself after several years of growth. As a result, many brands no longer dedicate valuable front-of-pack real estate to consumer education, instead relying on functional benefits and varieties to inform rather than persuade.



## FUNCTIONAL PROMINENCE

Mushrooms are prominent in functional categories long-used to mushrooms, like coffee and supplements.



## MUSHROOM AS MEATS

Meat substitutes continue to point out mushroom ingredients as a signifier of texture with very little focus on functional attributes.



## SHROOM-DULGENCE

Indulgent products haven't started featuring mushroom ingredients front-of-pack, suggesting that this trend hasn't seen peak adoption; consumers may still be cautious about mushrooms' effect on overall flavor.





03

**Carbon  
Footprint**

# Carbon Foodprint

The global food system is responsible for 30% of the world's GHG emissions. This stark reality is driving an increased focus on reducing the carbon footprint of food, a movement that includes reducing reliance on animal-based foods and shifting towards a more plant-forward diet. To echo the wise words of Michael Pollan: "Eat food. Not too much. Mostly plants."

A key aspect of this shift is the evolution of plant-based foods from merely being meat analogs to embracing more whole-plant ingredients. This evolution reflects a deeper commitment to sustainability, as whole-plant foods generally require less processing and have a significantly lower environmental impact than animal products, particularly beef.

It doesn't stop there. There is also a focus on reducing food waste: using upcycled food ingredients and more sustainable packaging solutions, repurposing by-products that would otherwise go to waste. This approach helps in significantly cutting down the greenhouse gas emissions associated with food waste in landfills, aligning profitability with environmental stewardship, and offering consumers products that are sustainable, innovative, and delicious.

03

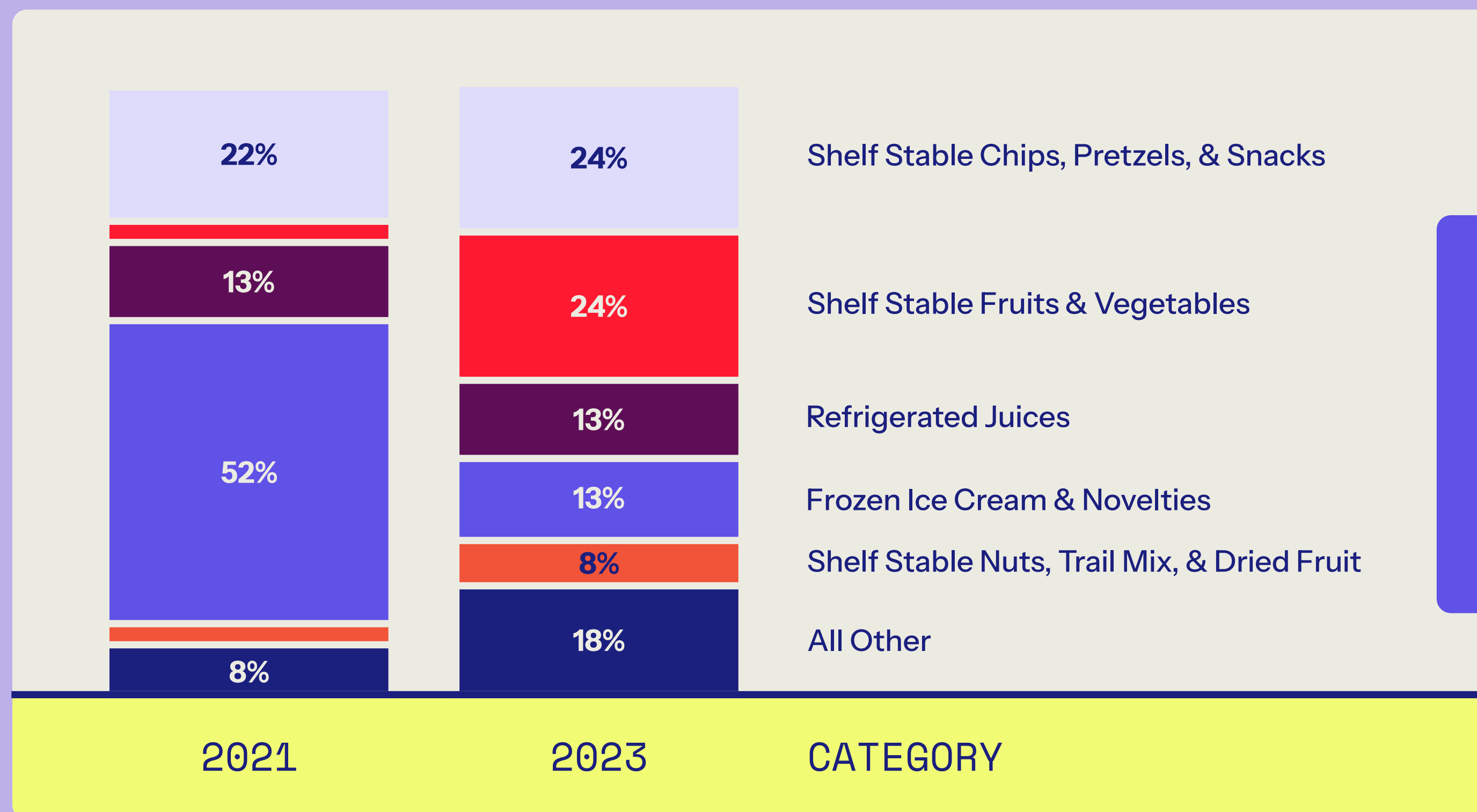


SPINS & the Upcycled Association partnered to track the market sales performance of Certified Upcycled Products.

There is opportunity to find new categories for expansion of upcycled products as consumers continue to find interest.

## CERTIFIED UPCYCLED CATEGORY SHARE SHIFT COMPARISON

2021 VS. 2023



Source: SPINS Certified Upcycled Dollar Sales by Categories across Total Store. SPINS Satori. 52 Weeks ending 12.31.2023. Total US- MULO + Natural Channel.

**TREASURE TIP**

Watch for the shift away from produce-oriented products to those that have a higher processing perception.



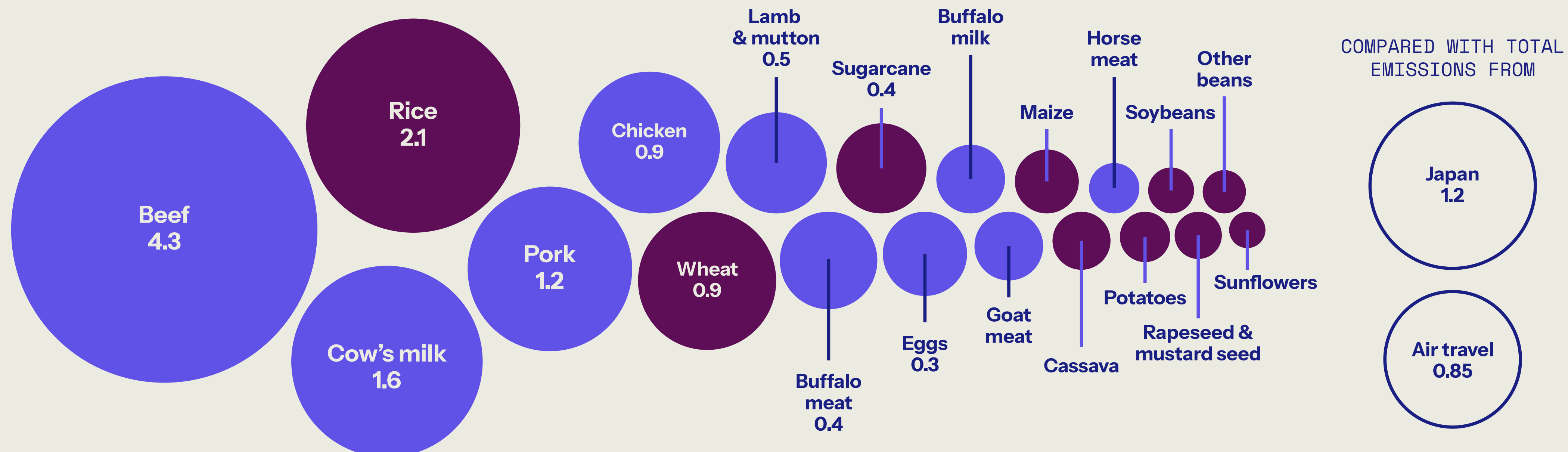
**TREASURE INSIGHT**

>120 items in the market tout reuse of by-products of foods unfit for sale.

Categories such as Chips appease consumer hesitancy with familiar format.

# ANNUAL EMISSIONS, CO<sub>2</sub>-EQUIVALENT GIGATONNES

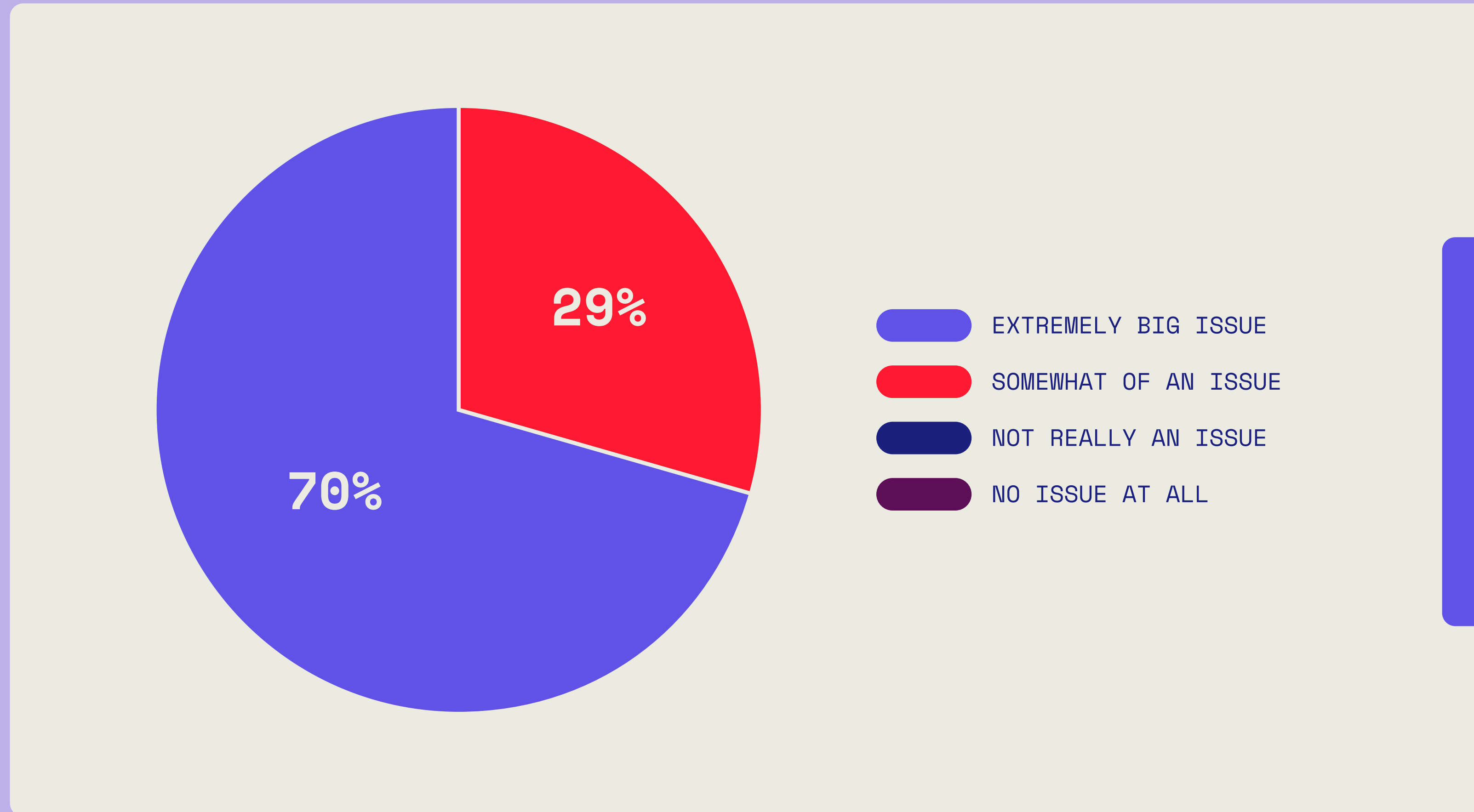
## TEN BIGGEST SOURCES IN EACH CATEGORY



ANIMAL-BASED FOODS      PLANT-BASED FOODS

Source: "Treating Beef like Coal Would Make a Big Dent in Greenhouse-Gas Emissions." The Economist, 2 Oct. 2021

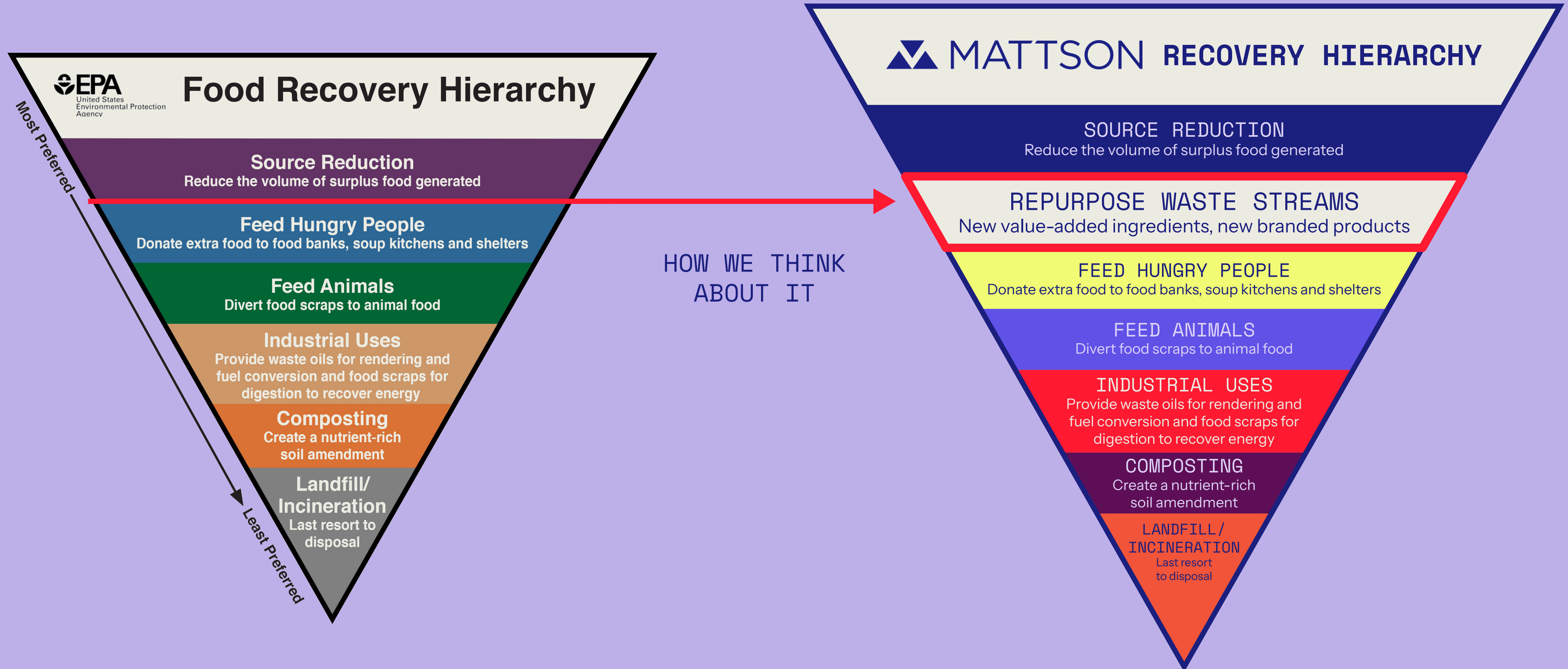
## FOOD WASTE AS AN ISSUE IN THE UNITED STATES IS...



**TREASURE INSIGHT**  
99% of consumers **saw food waste as an issue!**  
Nearly **ZERO** people feel food waste isn't important.

Source: Mattson 2021 Study on Food Waste

# FOOD RECOVERY HIERARCHY



**It's Skinny** N1506

It's Skinny highlights Konjac, a globally revered root vegetable. Though not explicitly stated, their minimalist design embodies the "less is more" philosophy, ensuring clarity and simplicity in their messaging.



**Seal the Seasons** N2006

Seal the Seasons' packaging guarantees transparency by clearly communicating the direct sourcing of their products through friendly, approachable "farm-to-table" imagery.



**LOVO** N1107

LOVO Chocolate's capitalization ensures every message within their hierarchy stands out. While flavor profiles shine, secondary messaging emphasizes Swiss Made and plant-based attributes for added consumer appeal.



**Omni Foods** N2101

Omni captivates consumers with visual representations of their plant-based meat replacements, prioritizing taste over their plant-based secondary messaging in their approach.



**Brami** 8106

Brami prominently features their nutrient-packed Lupini beans with Italian verbal and visual callouts, drawing attention to their authentic origins.



**SOMOS** N836 / 837

Creative ingredient callouts like "Peacadillo" nod to traditional picadillo with a pea protein upgrade, enhancing the visual appeal and peaking consumer interest.



**Dona** N2118

Dona's packaging design is straightforward, neat, and impactful, with their logo taking center stage. Renowned for traceable ingredients sourced from a single origin, they aim to foster an equitable food system and offer a product you can trust.



**Daring.** N2053

Daring, akin to other plant-based meat alternatives, relies on product photography for taste appeal, maintaining simplicity in their packaging, mirroring their minimal ingredient list.

**Ponder / MNMLST** N1601

MNMLST's name, clean ingredients, and simplistic design seamlessly align, reflecting their core minimalist ethos.



**Konscious** 5679

Konscious' name hints at a more conscious, plant-based, sustainable approach to eating. Their packaging prioritizes taste, assuring consumers they won't sacrifice flavor when choosing their plant-based options.

**Mellody** N445

Mellody's visual branding may not initially convey their honey as plant-based. However, honey dripper illustrations and golden visual cues subtly guide consumers to associate the product with traditional honey.



**MORE BRANDS TO WATCH**

- Harmless Harvest
- Unlimeat
- Supplant
- Mezcla
- Eathos Foods
- Good Culture

Brands continue to grapple with how to best position their sustainability efforts with consumers. While some brands rely heavily on minimalist branding, others highlight their plant-based ingredients or locations of origin, hoping that sustainability-minded consumers understand the benefits.



## CAPTURING CONSUMERS

Brands such as BRAMI, MNMLST, and Omni prioritize their logos and secondary messaging by frequently utilizing capitalization to capture consumers' attention.



## CLASSIC CALLOUTS

Carbon Foodprint packaging often prioritizes messaging hierarchy, highlighting "Plant Based" and "Super Food" callouts to stress sustainability and health-conscious decisions.



## ORIGIN AWARENESS

The origin of your food matters. Carbon Foodprint brands like Seal the Seasons, SOMOS, and LOVO emphasize front-of-pack directly where their products are sourced.



# 04

## Regenerative Revitalization



# Regenerative Revitalization

Regenerative Organic is the new high bar, and both consumers and farmers across produce, grains, meat, and dairy stand to benefit. Regenerative agriculture focuses on restoring soil health, increasing biodiversity, and improving the water cycle, offering a myriad of benefits.

For consumers, it means access to more nutrient-dense food options, as regenerative practices often lead to richer soil, which can produce more nutritious crops.

From an environmental perspective, this approach is a powerful tool against climate change by sequestering carbon, reducing greenhouse gas emissions and mitigating heavy metal levels in our soil, thereby contributing significantly to environmental sustainability, food safety, and security.

Additionally, for farmworkers and surrounding communities, regenerative agriculture can mean safer and more sustainable working conditions, as it often involves reduced chemical use and promotes a healthier ecosystem.

04





# REGENERATIVE CASE STUDY: TOPSOIL EROSION

The average topsoil depth at the beginning of the 1900s was 14-18 inches. In 2000, it was 6-8 inches.

## Why should we care about topsoil?

<p><b>Agriculture Productivity</b> Topsoil is nutrition for plants</p>	<p><b>Loss of Soil Biodiversity</b> Microorganisms and insects</p>	<p><b>Water Quality</b> From runoff that pollutes</p>
<p><b>Climate Change</b> Soil is a significant carbon sink</p>	<p><b>Economic Impact</b> Higher costs for farmers, fertilizer &amp; more</p>	<p><b>Land Degradation</b> Land can become unsuitable for growing</p>

Practices include: **cover cropping, reduced tillage, terracing, and maintaining vegetation cover.**

45%

of Americans say knowing that the workers who produce, distribute, or serve the food are treated in a fair and equitable way is important.

37%

seek information on social sustainability of foods and beverages from labels on their food.

1 in 5

of those who consider the treatment of workers important get information on it from the news and social media.

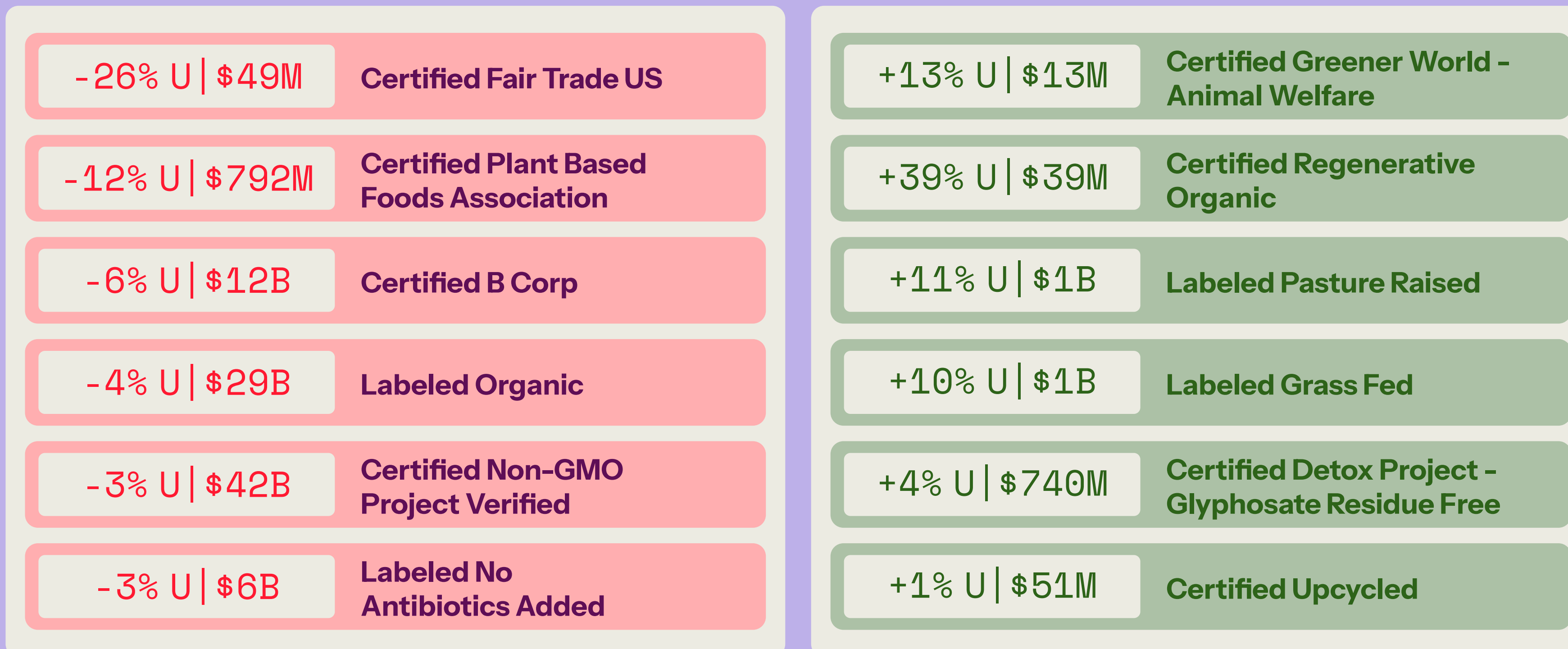
35%

will seek information on social sustainability of foods and beverages from labels on the manufacturer's website.



## SUSTAINABLE PRODUCTS SHOW MIXED RESULTS

Consumers are buying sustainable products—but not uniformly. Looking at sustainable products in conventional (MULO) and Natural channels, units are down -3%. However, there are plenty of bright spots showing growth when looking at unit performance (and correlating dollars).



Source: SPINS Natural Channel, SPINS Conventional Channel (powered by Circana) data 52 Weeks Ending 11.5.23  
Frozen, Grocery, Produce & Refrigerated Departments

SPINS & Regenerative Organic Alliance partnered to track the market sales performance of Regenerative Organic Certified products.

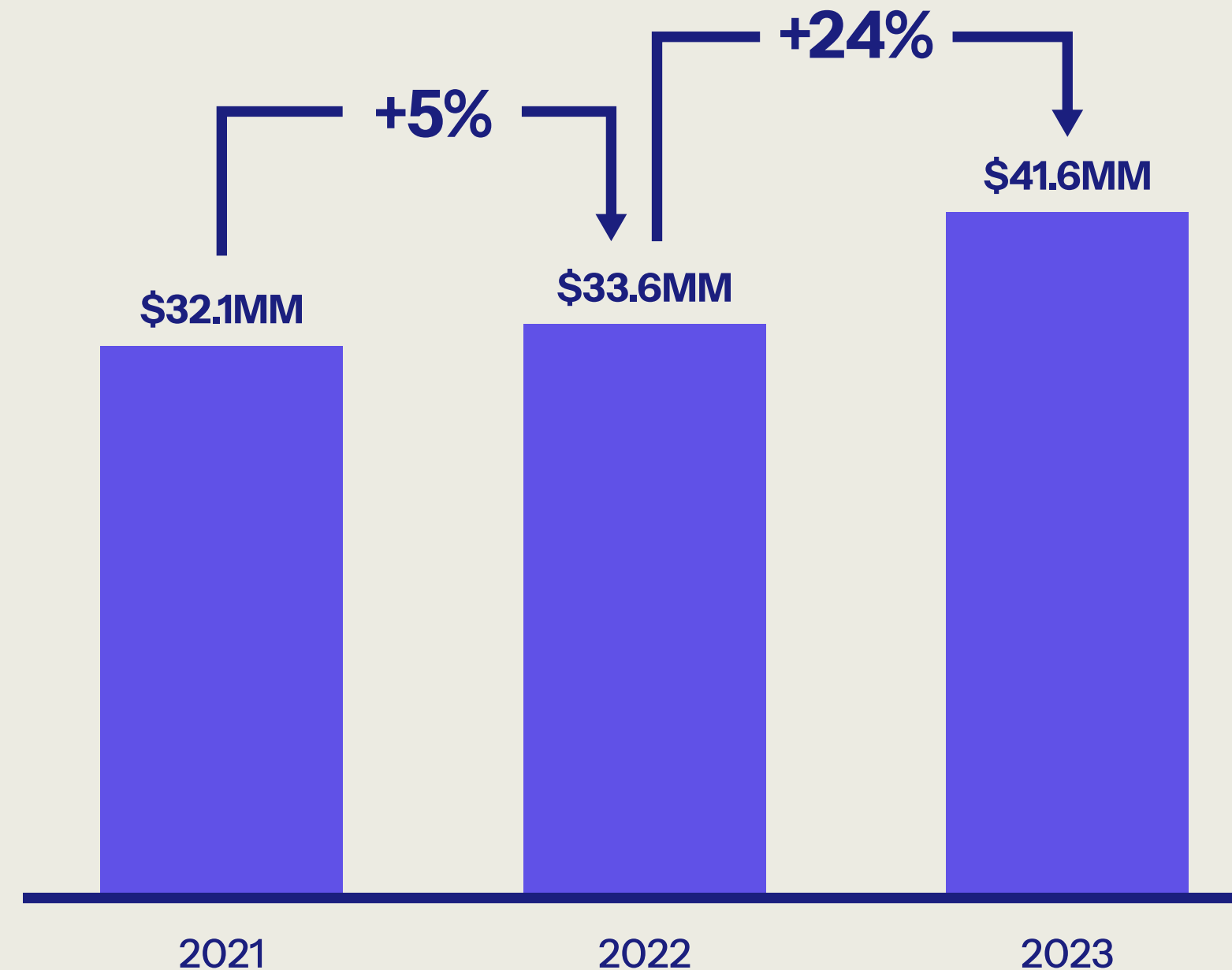
Accelerated growth of the certification exemplifies continued consumer interest for planet and people friendly products.

## REGENERATIVE ORGANIC CERTIFIED PRODUCT PERFORMANCE

### THREE YEAR DOLLAR SALES GROWTH



Regenerative Organic Certified™



Source: SPINS Certified Regenerative Organic Dollar Sales across All Departments. SPINS Satori. 52 Weeks ending 12.31.2023. Total US- MULO + Natural Channel.

**TREASURE TIP**

Watch for the prevalence of the attribute across pantry staples and value-added proteins as the certification seeks to revitalize supply chains.

# CROPS BEING DEVELOPED THROUGH TRADITIONAL AGRICULTURE TECHNIQUES

## Kernza® Perennial Grain Intermediate wheatgrass grain recently developed

- Perennial grain, cousin of wheat
- Ecologically beneficial perennial grain
- Yield potential of Kernza® is rapidly increasing
- After harvest, leaves and stems are grazed by cattle
- New varieties will enable farmers to grow it at scale



Long Root Pale Ale made with Kernza®



Kodiak Kernza® Cakes



Cascadian Farm Cereal made with Kernza® Grains



Patagonia Provisions Organic Kernza® Fusilli

# IT ALL STARTS WITH REGENERATIVE

Regenerative agriculture doesn't just affect crops, it affects the entire food chain. Products like regenerative meat, specifically beef, allow us to positively impact more land than any other species. Backed with empirical data, regenerative beef is combatting climate change at a rate that, when adopted at a larger scale, has the potential to sequester all human-generated carbon annually. Regenerative meat is good for you and it's good for the planet.



## HOW DO YOU COMMUNICATE REGENERATIVE BENEFITS TO CONSUMERS?

Many consumers may be aware of the concept of regenerative agriculture, but might not understand its actual impact on the planet and the food they're buying. Through using clear and simple language, emphasize how regenerative practices improve soil health, promote biodiversity, and sequester carbon, leading to more sustainable and resilient ecosystems. Along with the environmental benefits, provide transparent information about the specific regenerative practices employed to build trust and credibility in your practices and products. Finally, emphasize how the process impacts the products through superior taste, nutrition, and overall quality of products grown or raised using regenerative methods, appealing to consumers' desire for healthier and more ethical food choices.





**Salt Spring Coffee**

Hall B | 1856

Salt Spring Coffee's packaging welcomes consumers with a visual representation of grassroots innocence, complemented by symbols affirming their commitment to organic and fair trade practices, assuring consumers of their conscious choices.



**Big Picture Foods** N221

Big Picture Foods prominently displays regeneratively farmed, USDA organic, and naturally pasteurized callouts, providing clear cues to consumers right at the forefront of their packaging.



**Force of Nature** N347

Force of Nature adopts a vintage-inspired design, reflecting their commitment to regenerative agriculture and timeless values.

**Pasture Bird** N244

Pasture Bird's packaging visually communicates its benefits through plant-forward illustrations, prioritizing claims of pasture-raised, fresh grass, and healthy soil in its messaging hierarchy, ensuring a conscious consumer choice.



5185 & 890 **King Arthur Baking Company**

King Arthur Baking Company prioritizes planet-friendly farming practices. Though not explicit on packaging, secondary cues like Non-GMO symbols and real ingredients highlight their commitment to sustainability.



3033 **Dr. Bronner's Chocolate Bars**

Every inch of Dr. Bronner's packaging is adorned with Organic and Fair Trade certifications, leaving no question about their dedication to regenerative organic agriculture.



**Patagonia Provisions** N842

Patagonia Provisions' clean packaging conveys simplicity, letting the product speak for itself without overwhelming messaging, ensuring transparency for consumers.



**Annie's** 717

Annie's emphasizes its "bunny seal of approval" and organic certification in their messaging, highlighting their commitment to environmental sustainability.

**Cheddies** N1438

Cheddies' messaging hierarchy emphasizes their dedication to planetary preservation, with packaging symbols providing conscious consumers immediate proof points of their support for regenerative farmers.



N911 **Alexandre Family Farm**

Alexandre Family Farm packaging emphasizes simplicity and nostalgia, featuring symbols that reflect their commitment to both the planet and personal health.



**Organic Valley** 1840

Organic Valley proudly displays its ethical values on the front of their packaging, supported by illustrations and positive impact messaging throughout.

**SIMPLi** N2239

SIMPLi prioritizes packaging to visually communicate its purpose, emphasizing food certifications and sustainability credentials for transparent messaging about their products.



**Lundberg Family Farms** 1641

Within window box packaging, Lundberg Wild Grain rice is spotlighted, visually presenting its whole grain goodness. Sustainable and non-GMO certifications prominently underscore their commitment to quality.

Regenerative revitalization isn't confined to one category—it extends across every grocery aisle, encompassing various initiatives for a more sustainable and environmentally friendly future.



# NOSTALGIC SUSTAINABILITY

The Regenerative Revitalization category relies on nostalgic design to evoke a sense of personal purpose for our planet, appealing to consumers' environmental consciousness.

# CONCIOUS CONSUMERS

Regenerative-focused CPG brands are aligned in their mission: to drive positive change, one product at a time, and inspire more conscious consumer choices.



Gen Z Tastes  
on Tour

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# Gen Z Tastes on Tour

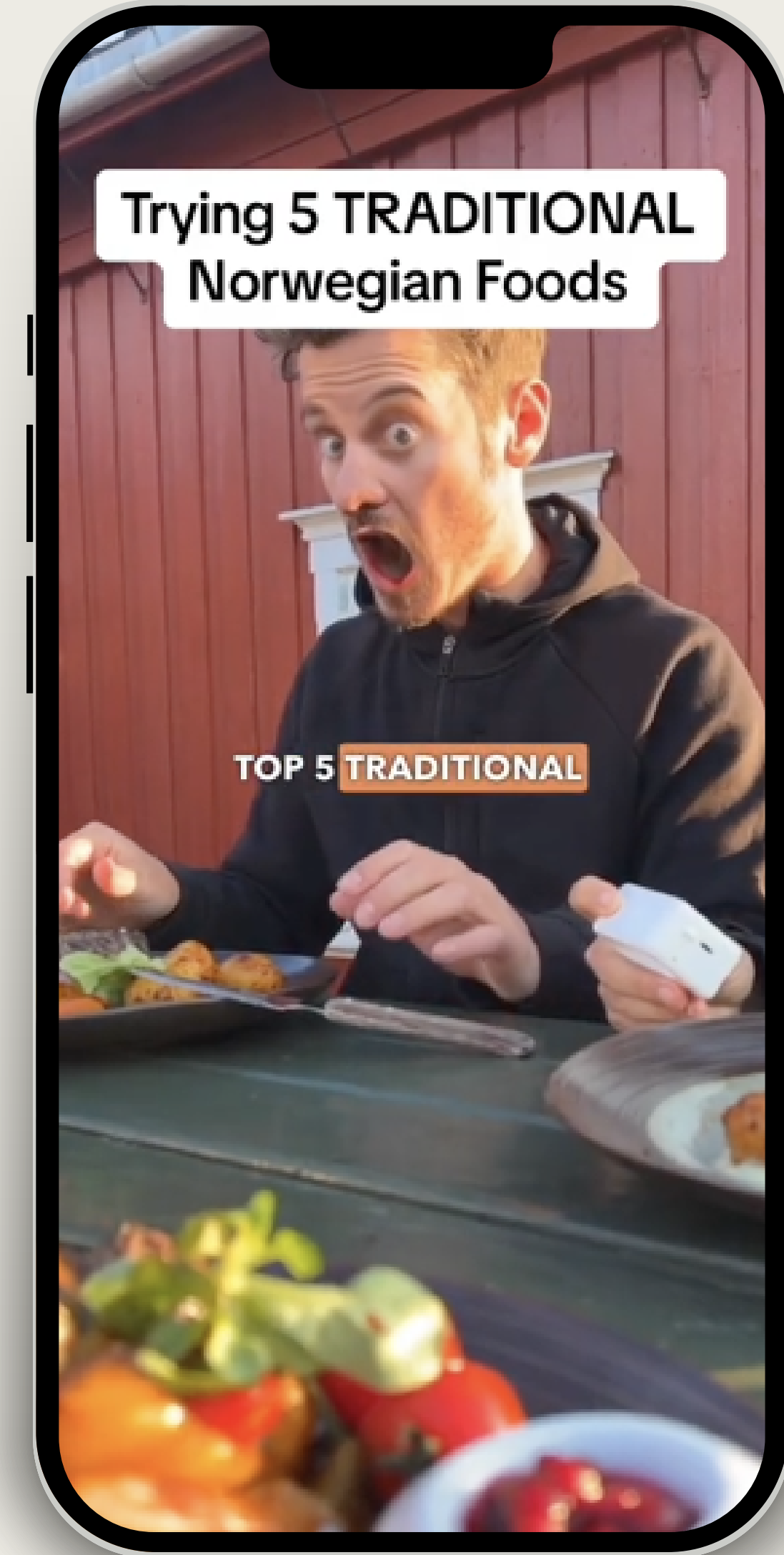
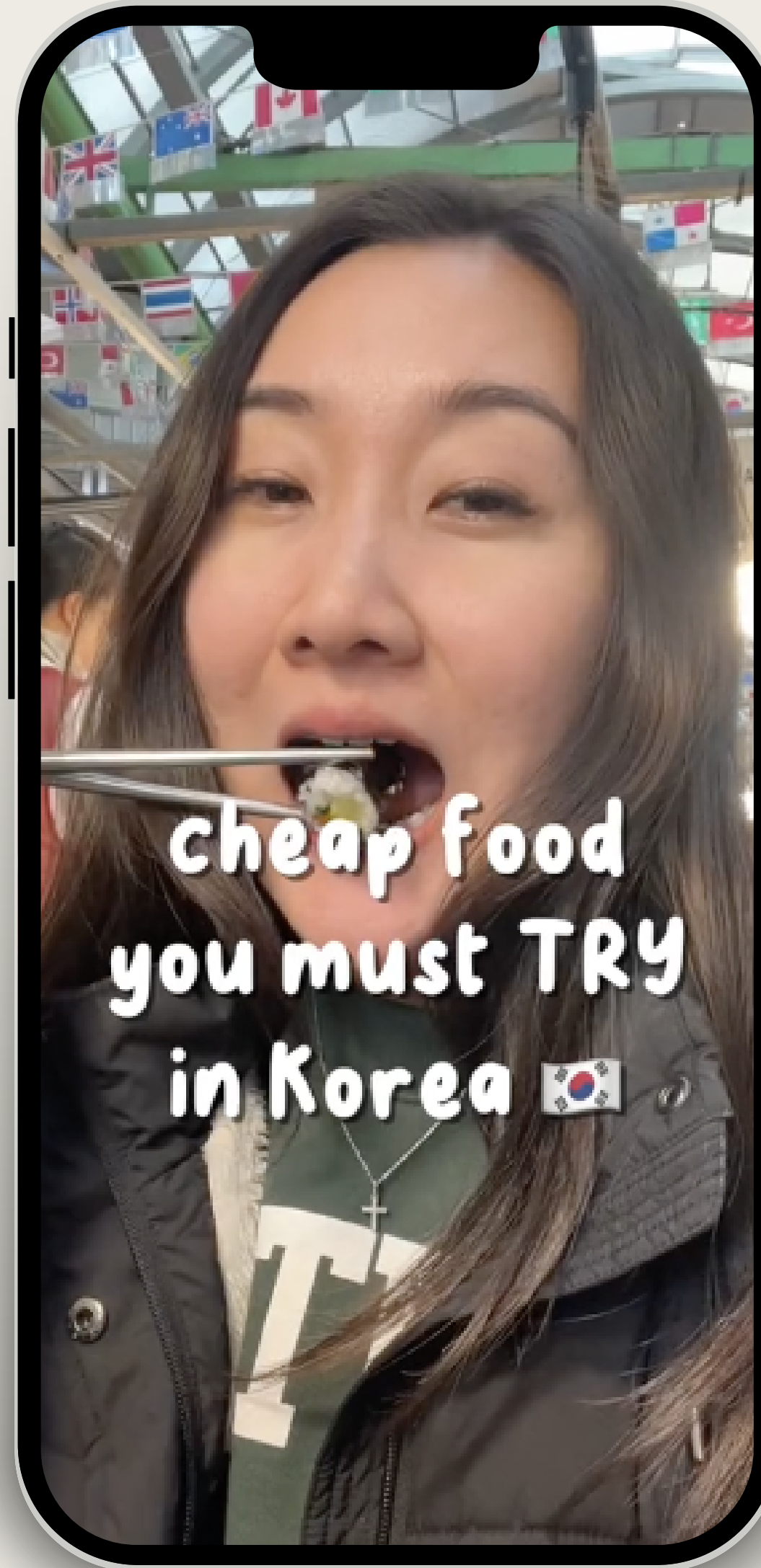
Global cuisine exploration continues to gain significant traction among Gen Z consumers, driven by a curiosity and appreciation for diverse cultures and exciting culinary experiences without the plane ticket. One key territory of this trend is the rising popularity of food and flavors inspired by Latin American, African, and Asian countries, especially in the sauces and condiments categories. These products offer authentic and unique tastes at a low entry cost, allowing consumers to taste culinary traditions from various parts of the world right from their kitchens. And as a condiment they can customize their experience to boot.

This exploration includes everything from spicy, tangy flavors to exciting new textures. The growing interest in flavor tourism is drawing Gen Z to globally-inspired diets that are more inclusive and focus on whole foods, such as the Blue Zones Diet and the Mediterranean Diet, which emphasize more produce, grains, and healthy fats – bringing health benefits and cultural richness while building more friendly relationships with the world of dieting.

05



# GEN Z'S DAILY MEDIA FEED IS GLOBAL.



Compared to 1986, in 2015 females who had dieted or exercised to lose weight and those who described themselves as overweight had greater depressive symptoms\*. The same pattern was not observed in males.

**#1 DIET DRIVER:**  
Improve physical appearance

\*Y axis represents the mean difference in standardised depression scores for adolescents 'with' vs. 'without' the behaviour.

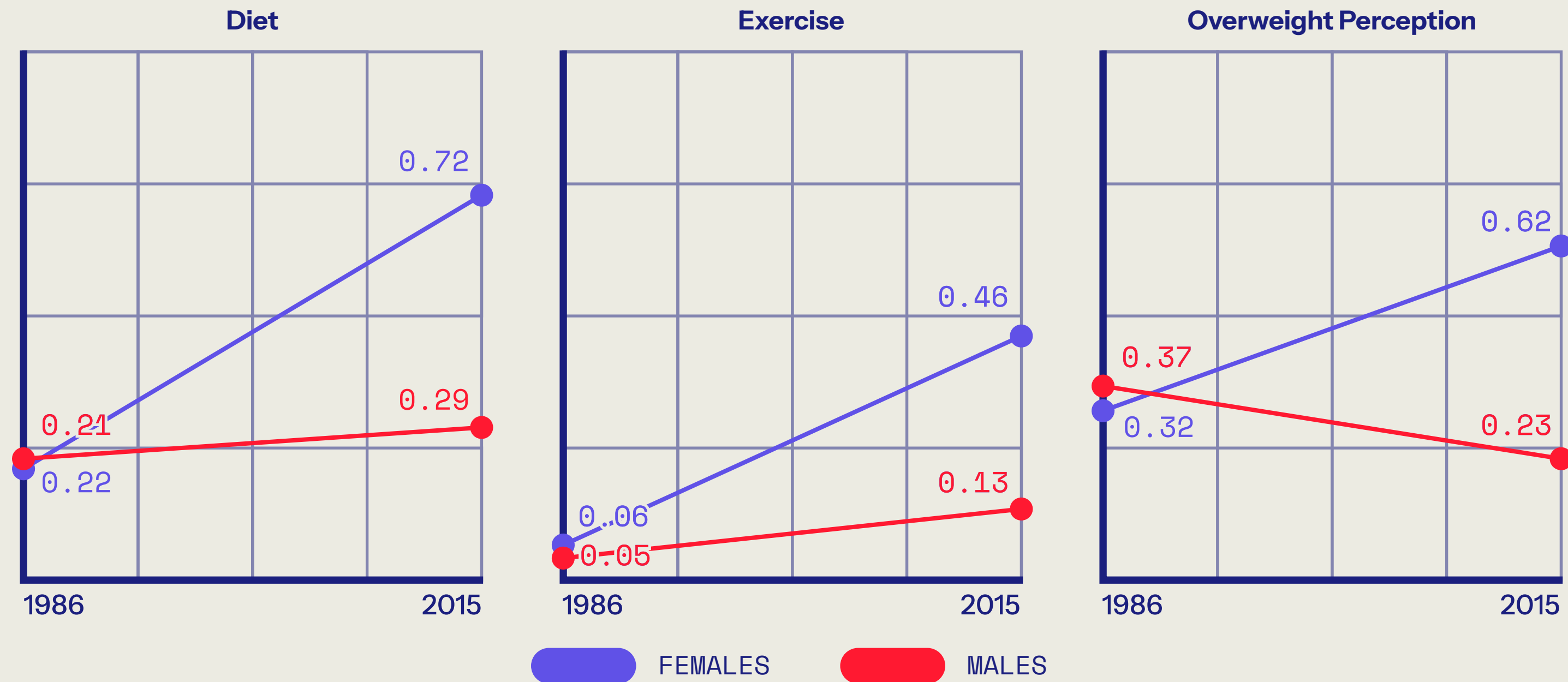
**TREASURE TIP**

**Female Gen Z-ers are more likely than Gen X or Millennials were at their age to follow diets despite being less likely to be overweight.**



## WHY IS GEN Z TURNING TO DIETS?

### WEIGHT LOSS BEHAVIOURS, WEIGHT PERCEPTION, AND DEPRESSIVE SYMPTOMS



Source: IFIC Food and Health Survey; Solmi and Patalay 2015

Social media plays a significant role in shaping the diet habits of Gen Z, influencing their food choices, preferences, and perceptions. With platforms like Instagram, TikTok, and YouTube flooded with content related to food trends, recipes, and dieting tips, young individuals are constantly exposed to a myriad of food options and nutritional information.

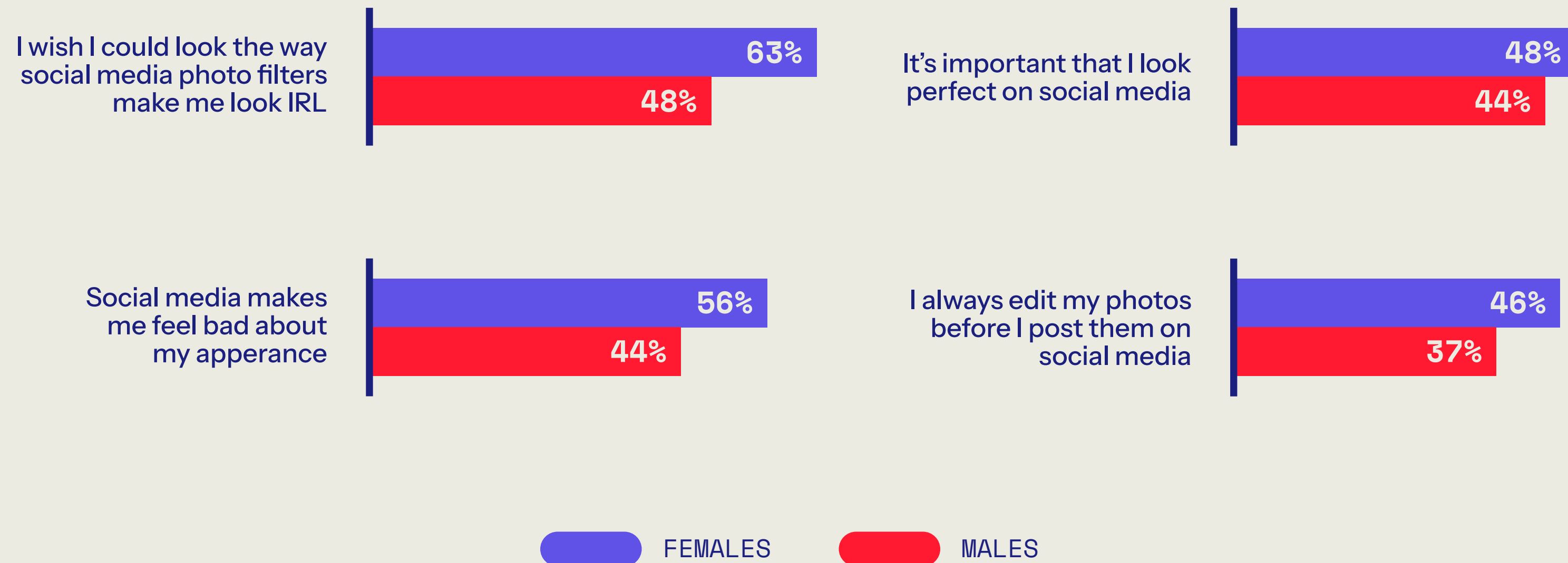
However, this exposure to curated representations of food can also contribute to unrealistic standards and unhealthy relationships with food among Gen Z. **Female Gen Z-ers are the most likely to experience the impact of social comparison from social media.**

**TREASURE TIP**

**Diet and nutrition brands can help Gen Z improve their relationship with food by leveraging their love of international flavors and cuisines.**

## SOCIAL MEDIA IS A KEY DRIVER FOR GEN Z'S DIET HABITS

### WHAT ARE THEIR THOUGHTS ON SOCIAL MEDIA AND BEAUTY?

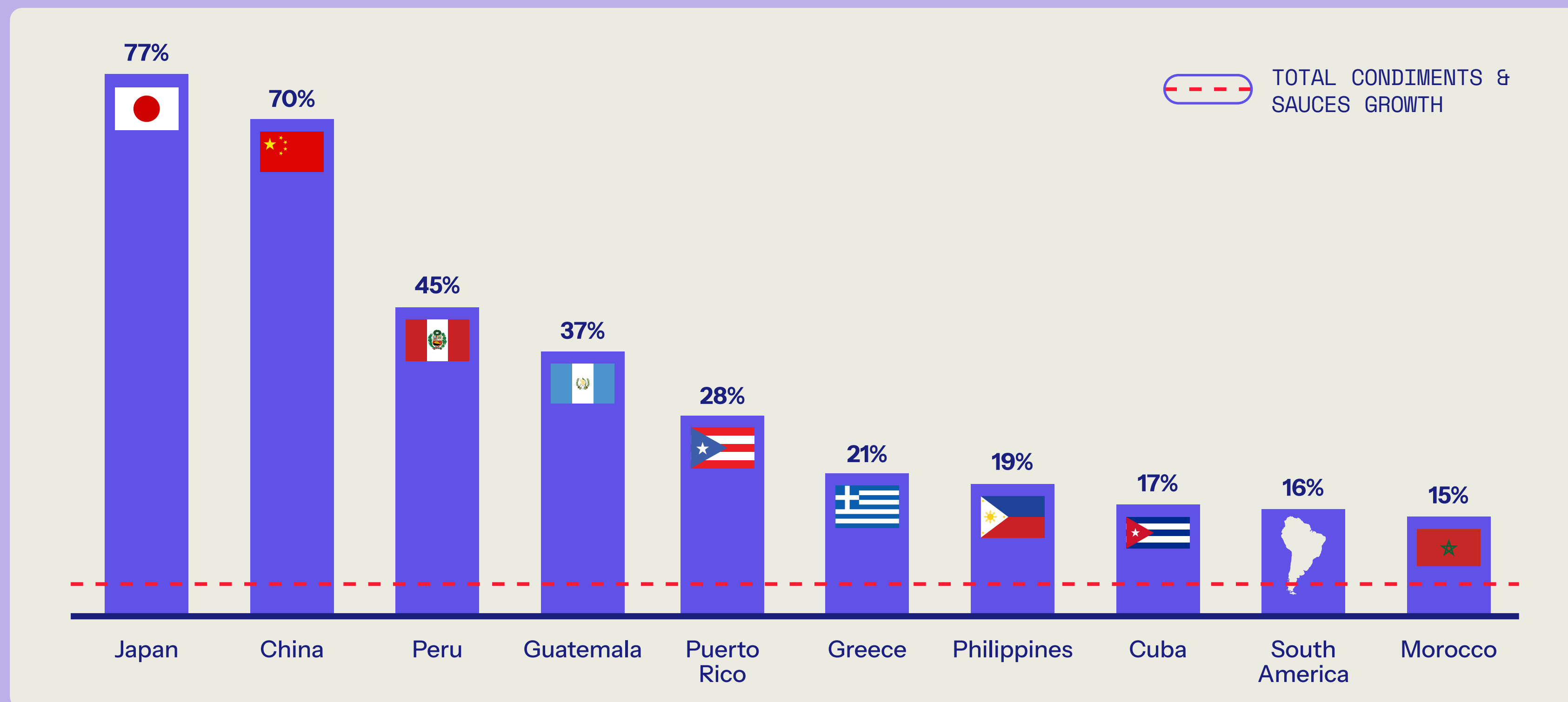


Source: YPulse Personal Care & Beauty Behavioral Report 2021

SPINS International Attribute tracks the market performance of products by geographic origin of taste and brand.

Products with international flavor profiles are gaining share across the retail landscape, signifying shifting consumer preferences.

## FASTEST GROWING INTERNATIONAL FLAVOR PROFILES ACROSS CONDIMENTS & SAUCES, DOLLAR % CHANGE VS. YA



Source: SPINS International Attribute (with Dollar Sales >\$500K) \$ % Change vs. YA across Refrigerated Condiments & Shelf Stable Condiments & Dressing & Marinade. SPINS Satori. 52 Weeks ending 12.31.2023. Total US- MULO + Natural Channel.

**TREASURE TIP**

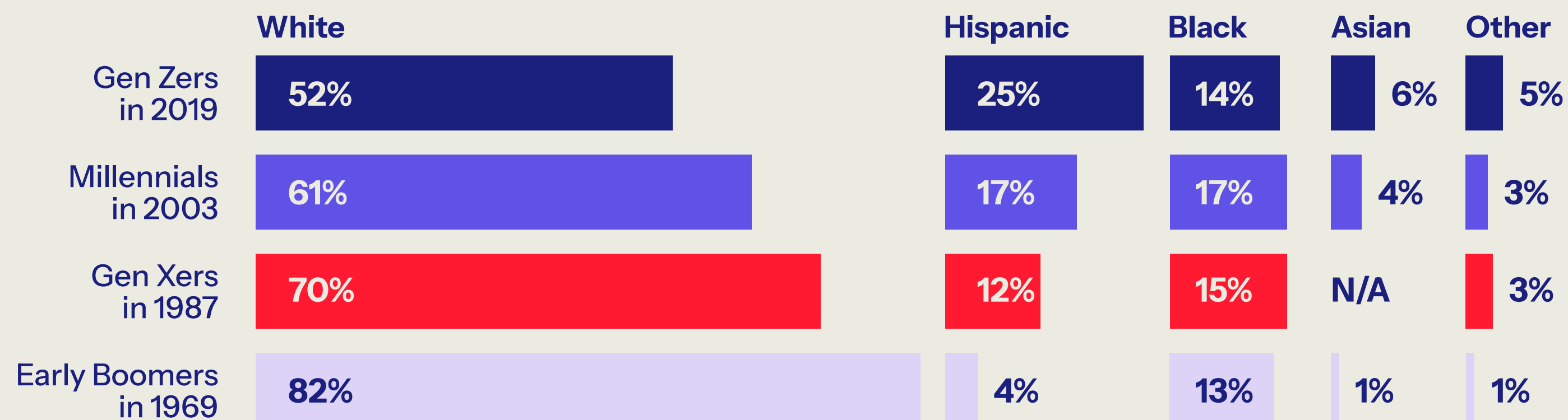
Watch for interesting heat sources and how global textures vary from traditional North American foods.



## AS THE MOST DIVERSE GENERATION IN HISTORY, GEN Z LOVES BOLD, AUTHENTIC FLAVORS

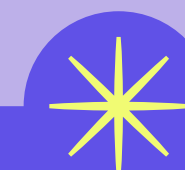
### ONE-IN-FOUR MEMBERS OF GEN Z ARE HISPANIC

% OF 7- TO 22-YEAR-OLDS WHO ARE...



Note: Figures may not add to 100% due to rounding. Racial groups only include only single-race non-Hispanics. Hispanics are of any race. Asians include Pacific Islanders. The CPS did not separately identify Asians until 1988. Hispanic origin was not collected until 1971. The racial and ethnic composition of Boomers in 1969 was imputed on the basis of 8- to 23-year-olds in the 1970 census. Source: Pew Research Center analysis of 1987, 2003, and 2019 Current Population Survey Annual Social and Economic Supplements and 1970 decennial census (IPUMS).

“On the Cusp of Adulthood and Facing an Uncertain Future: What We Know About Generation Z So Far”



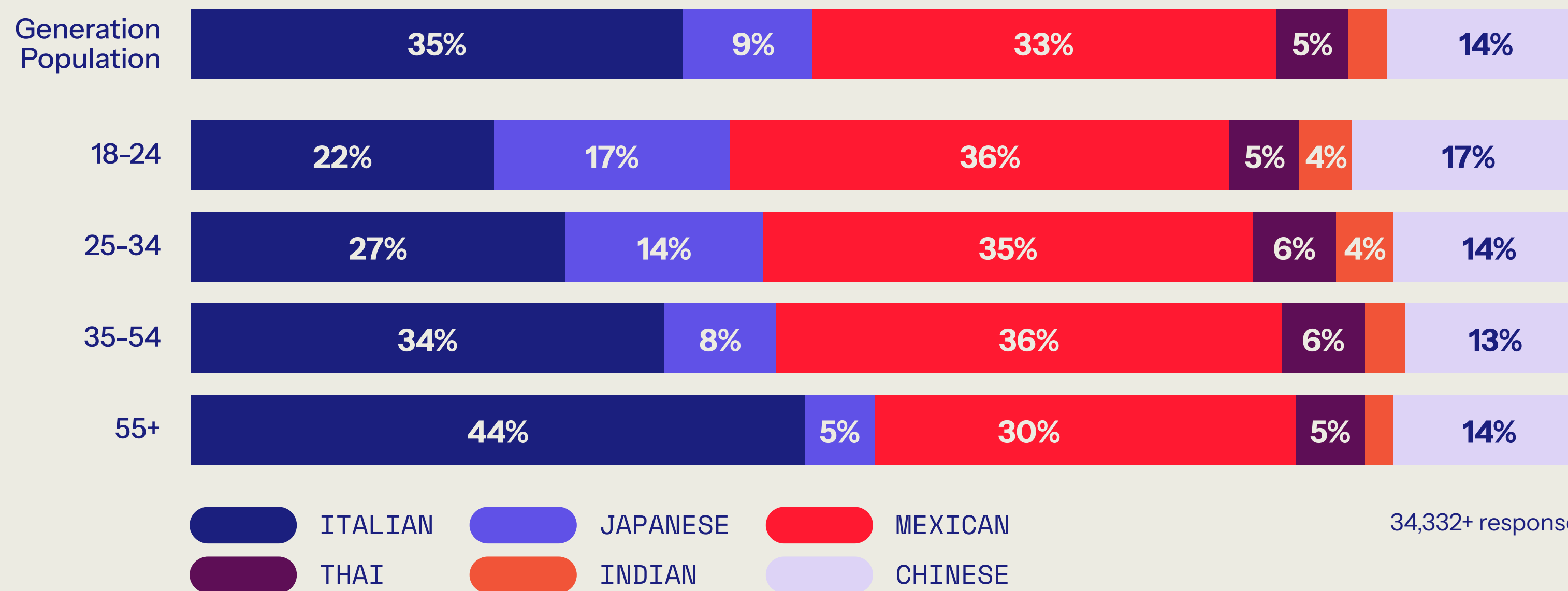
#### TREASURE INSIGHT

“[Gen Z] are more experimental and prefer authentic, bold and spicy flavors more than the generations before them.”

- **Brendan M. Foley,**  
**President of**  
**McCormick & Co.**

## GEN Z IS EATING MORE DIVERSE CUISINES AT HOME AND IN RESTAURANTS

WHICH ONE OF THE FOLLOWING TYPES OF FOOD DO YOU MOST PREFER?  
BY AGE

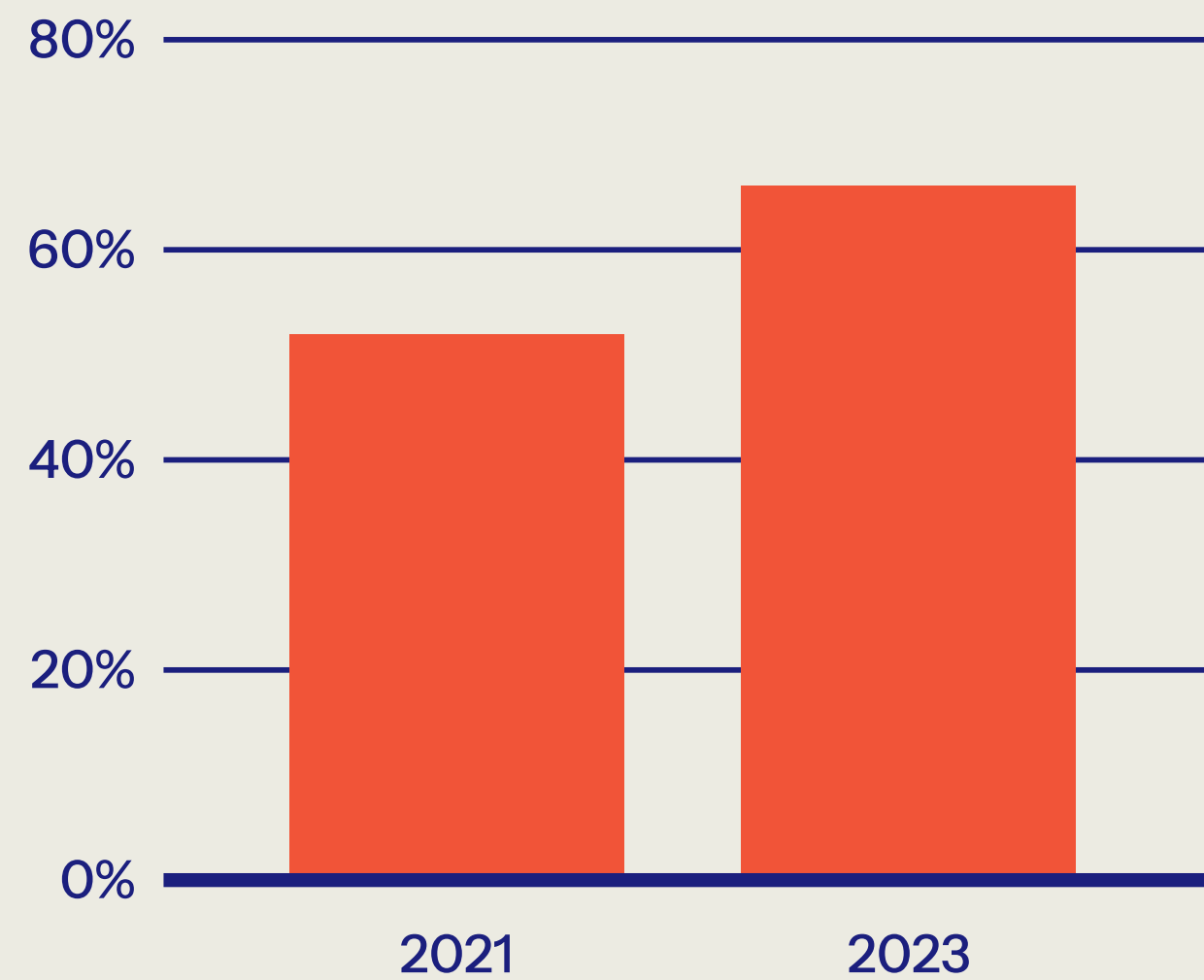


34,332+ responses from 04/24/2023 to 05/24/2023  
Weighted by U.S. Census 18+  
© CivicScience 2023

**TREASURE INSIGHT**  
58% of Gen Z has eaten a **globally inspired dish** within the last week versus just 19% of Boomers.

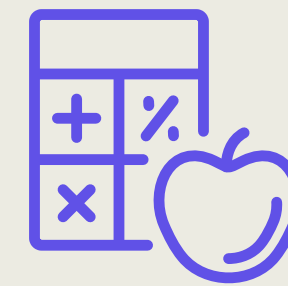
## YOUNGER GENERATIONS ARE TURNING TOWARDS DIETS AT RECORD RATES

% OF PEOPLE AGED 18-34 FOLLOWING A DIET/EATING PATTERN



Source: IFIC Food and Health Survey

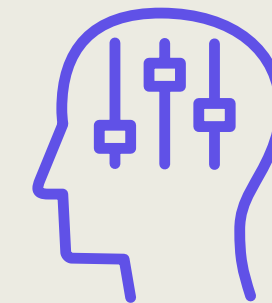
TOP DIETS/EATING PATTERNS



Calorie Counting



Clean Eating



Mindful Eating



Plant-based Eating



**Bachan's** 5256

These Japanese Barbeque Sauces boast bold, crave-worthy flavors rooted in tradition with authentic family recipes, embracing the essence of Japanese culinary heritage.

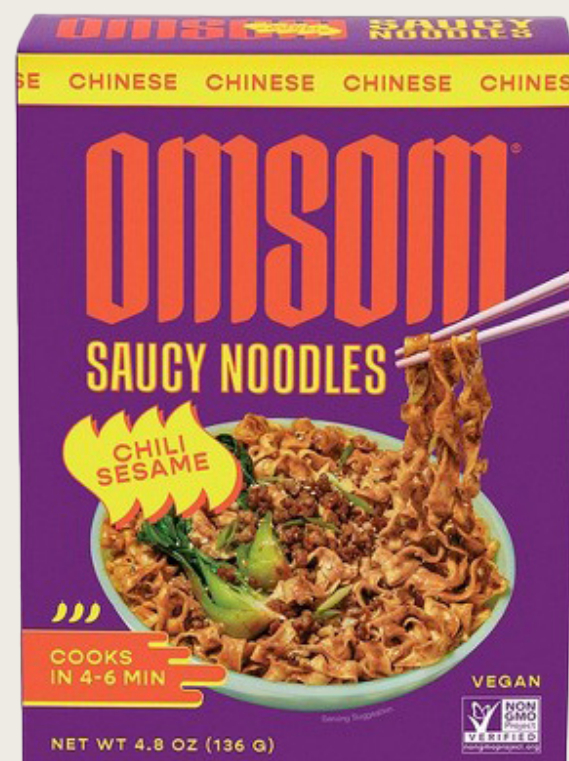
**Bowlcut** N1261

Bowlcut sauces offer rich, delightful flavors, echoing Asian sauciers' tradition. Their simple hierarchy and clear flavor cues maintain focus on each sauce's essence, prioritizing breakthrough on-shelf.



**Omsom** 8208

Omsom Noodles brings bold traditional Asian flavors with "saucy" creations and authentic cooking sauces. Their packaging features clear flavor and cultural callouts, balanced by a key feature within this category: ease of preparation.



**Fillo's Walking Tamales** N1424

Fillo's Walking Tamales stand out with vivid packaging and a flavor heat index, simplifying the shopping experience. The color-coded system indicates the spice level, making it effortless to choose the ideal level of heat.



**A Dozen Cousins** N213

A Dozen Cousins offers authentic cultural recipes inspired by Creole, Caribbean, and Latin American traditions. Their color-blocked packaging ensures easy flavor recognition, enhancing the shopping experience for delightful culinary exploration.



**¡Ya Oaxaca!** 4950

¡Ya Oaxaca! rich mole sauces, crafted in Oaxaca, promise an authentic taste of Mexican cuisine. Vibrant packaging enhances the experience, inviting consumers to savor every spicy, savory note.

**Anne's Toum** 8613

Anne's Toum packaging reflects authentic family recipes, capturing the essence of Lebanese culture. Though subtle, product titles and design hints infuse rich heritage and flavors, enticing consumers to experience its authenticity.



**Blue Zones Kitchen** N2141

Blue Zones' Sauces directly call out its convenience to consumers with the line "Make the healthy choice, the easy choice." Their packaging fosters inclusivity with native language and prominently features their Costa Rican origin at the forefront.



**Maazah** N2040

Maazah Sauces infuse Middle Eastern flavors into their packaging, echoing the essence of "flavor, taste, and joy." With vibrant colors and ingredient-focused designs, Maazah sauces stand out, making them easy to spot on shelves.



**Afia** N2308

Afia's Eastern Mediterranean falafel flavors are showcased on the packaging, simplifying flavor identification for customers. Utilizing a color-coded and ingredient-focused system, it provides clarity on each variant's ingredients.

The Gen Z Taste on Tour trend highlights the importance of understanding your food's origins. With a clear top-line hierarchy featuring places like Japan, Cuba, Oaxaca, and China, the era of not knowing where your food comes from is over.



## CONVENIENCE & AUTHENTICITY

In this category, flourishing brands strike a balance between Gen Z's appetite for convenience and their pursuit of authenticity, often underscored by design and place of origin rather than focusing solely on specific ingredients.

## CULTURAL CALLOUTS

Omsom Noodles and Afia use clear flavor and cultural cues on their packaging to appeal to diverse audiences. By highlighting their Eastern Mediterranean and Asian influences, they offer a taste of authentic cuisine from around the world.

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