

Daymon

INNOVATION REPORT

20TH EDITION – PART 1

SPECIAL EDITION:

THE NEW RULES OF HEALTH – PART 1

DIG INTO HEALTH TOPICS

*EXPLORE INNOVATIVE CONCEPTS FOR
EACH TOPIC*

10 CONCEPT FOLLOW UPS

2 BRAVE NEW INNOVATIONS



EDITORIAL

Despite the current global atmosphere of financial uncertainty, consumers are not pausing their quest for a healthier life. If, on one hand consumers are paying attention to the cost of living, on the other, recent events have strongly contributed to redefining their personal concept of health.

The trend towards holistic wellbeing has been around for some time, with businesses seizing the momentum for a while now. Nevertheless, this has been a daily reality for few. Up until now, living a healthy life has only been an option for those who could understand it and/or afford it. What we are seeing now is that health in its broadest sense is becoming a priority for everyone, not just to address a problem but also to take preventative measures. Because they have more information at their disposal, customers can choose different options and create a diet that is better tailored to their needs. Additionally, it is becoming crucial for customers to enjoy the moment of consumption, adding a new component to the health equation.

In this edition of the Innovation Report, we will explore the evolution of the health topic, and its' influence in this shift, and how the industry can adapt to meet consumer demands. The report is divided in 2 parts – part 1 explores the health topics, illustrated with concepts and part 2 will be focused on the 9 key health drivers which are influencing the new rules of health.

AGENDA

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- *The broader definition of health*
- *The different layers of health*
- *Health topics*

KEY THEMES: HEALTH TOPICS 6

- *Physical Health:*
 - *Nutritive Health*
 - *Functional Health*
- *Environmental Health*
- *Mental Health*

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WHY ARE WE TALKING ABOUT HEALTH?

THE BROADER DEFINITION OF HEALTH

In today's fast-paced and ever-changing world, we are seeing that the meaning of health is changing, in tandem with consumers own evolution. As demonstrated in the B-Well microtrend 'Balanced Self', the definition of wellness is becoming holistic, expanding beyond the physical to encompass a balance of mental, emotional, social, financial, spiritual, environmental, and intellectual wellbeing.

Though the topic of health is not new, as consumers are changing, their definition of health is getting broader, going beyond the personal realm. As they strive for a better quality of life and longevity, they are demanding products and services that cater for those needs. Thus, the industry is recognising new opportunities to provide meaningful solutions that support those evolving health aspirations.

The rules around health have been further impacted by the Covid-19 pandemic, geopolitical factors, and general high inflation. Hence, the question of access to health solutions is a key consideration for consumers striving for quality of life and longevity.



66%

of global consumers say that their health is made up of 4 dimensions*



64%

of global consumers say that how a product or service impacts their health and well-being often and always has an influence on their choice of food and drink

WORLD HEALTH ORGANISATION DEFINITION OF HEALTH



World Health Organization

Health

is a state of complete physical, mental and social well-being



Healthy Food is about the positive impact of product and production on Peoples' health

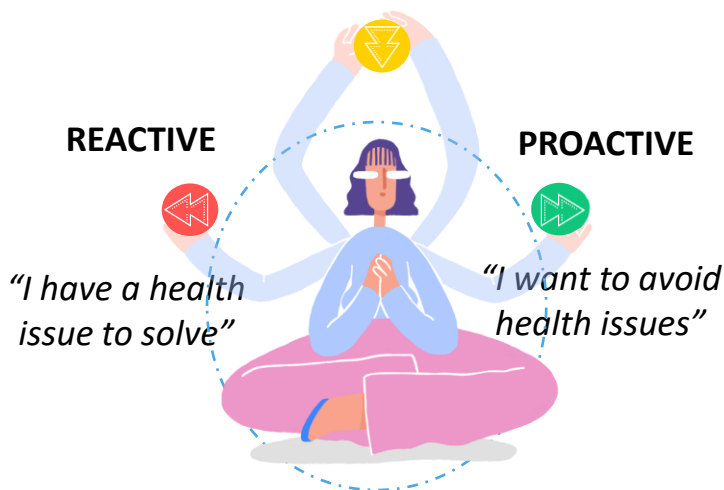
WHY ARE WE TALKING ABOUT HEALTH?

THE DIFFERENT LAYERS OF HEALTH

The new definition of health expands from reactive health to encompass proactive health and the moment of holistic wellbeing, moving from solving an issue: **Reactive** “I have a health issue to solve” to also prevent a specific issue: **Proactive** “I want to avoid health issues” and aiming to feel well at the same time: **The moment** “I want to be happy at the moment of consumption”.

“I want to be happy at the moment of consumption”

THE MOMENT



Consumer's Individual Health Needs

Consumers are making subtle adjustments to their habits, in an effort to prevent both future health problems and enjoy improved wellbeing. It is important for the industry to keep monitoring consumer trends in order to adapt its strategies to meet the ever-evolving demands.

Reflecting on the Hartman Group Health Model, to be meaningful to consumers, retailers and brands need to be strong at the core by developing healthier products and addressing their specific needs. But they also need to support consumers in their healthy lifestyle choices, going beyond products, to include tracking and monitoring of their health. By acting on the full spectrum, retailers and brands will become health partners.

72%



of US consumers agree they are **proactive about their health**, by doing things to lower health risks and prevent disease

of global consumers, state that when considering their personal outlook in 5 years, they **expect to be healthier than they are now**

48%

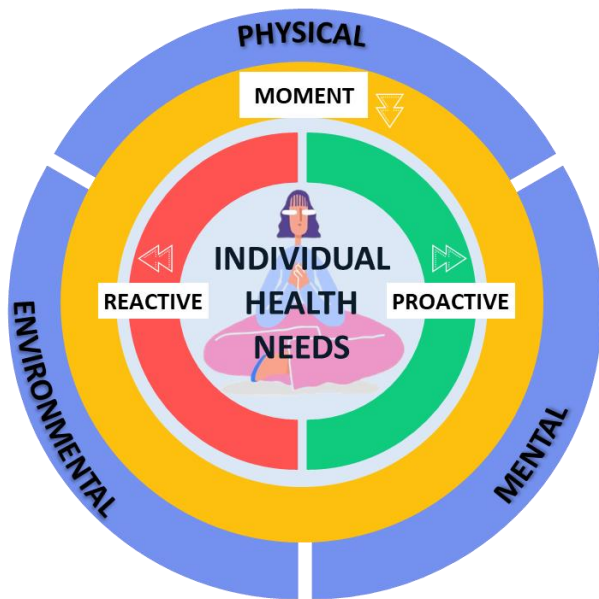


WHY ARE WE TALKING ABOUT HEALTH?

HEALTH TOPICS

Consumers are becoming more aware of how their daily habits affect the spectrum of health, from **physical wellbeing (me and my body)**, to **mental wellbeing (how I feel)**, and **environmental wellbeing (how I act to have a positive impact on the health of the planet)**.

PHYSICAL: Physical health combines both a functional relation to health and a nutritive one.



- **FUNCTIONAL:** The functional topic includes products that aim to bring additional benefits and functionalities to consumers. These enhanced products tend to be easy to consume when taking into consideration the added benefits, as they aim to make functionality easily accessed.
- **NUTRITIVE:** Nutritive health is more about solutions that aim to bring a balanced and healthy lifestyle, making sure that consumers eat a diversified, complete diet, in the right proportions, providing the body the essential nutrition it needs.

MENTAL: Mental health is linked to functional solutions that act on how customers feel. Functionality is no longer about the physical state but the mental one. It includes products that are designed to offer functional benefits on the cognitive functions, or even help to reduce stress, or improve sleep.

ENVIRONMENTAL: Environmental health includes products that aim at answering the connection between personal health and the health of the planet, going broader than the topic of sustainability. If the topic of environmental wellbeing is part of the broader area of sustainability it is also becoming more connected to health in this new, more comprehensive definition.

HEALTH TOPICS

PHYSICAL: NUTRITIVE HEALTH

Nutritive health is related to products that aim at bringing a balanced and healthy lifestyle, focused on making sure that consumers eat a wide variety of foods in the right proportions and provides the body with essential nutrition.

58%

of global consumers find health labelling (nutrition) often to always influences their product choice *



VEGGIE-RICH BREAD



COATED SUNFLOWER SEEDS



PLANT-BASED TODDLER DRINKS



AVOCADO COFFEES



ELECTROLYTE-PACKED FREEZER POPS



ELECTROLYTE-PACKED FREEZER POPS



CHICKPEA & CHEESE SPREAD



HEALTH TOPICS

PHYSICAL: FUNCTIONAL

Functional health is related to products that aim at bringing additional benefits and functionalities to consumers. These enhanced products tend to be easy to consume, the aim is to make functionality easy to access.

+60%

Of European consumers (DE, PL, SP, UK) use functional or fortified food and drink at least once a week*



**HIGH-PROTEIN CEREAL
MADE FROM PULSES**



**EGG WHITE
SPORTS DRINKS**



DRAGON FRUIT SNACK



**PROBIOTIC PLANT-BASED
BEVERAGES**



**FUNCTIONAL TUNA
CANS**



**PET SUPERFOOD
SPRINKLES**



HEALTH TOPICS

PHYSICAL: FUNCTIONAL



VITAMIN-ENRICHED SUN PROTECTION



KETO FRIENDLY BAKERY



GUT-FRIENDLY CHOCOLATE



LIDL'S SKINCARE AWARENESS CAMPAIGN



HEALTH TOPICS

ENVIRONMENTAL HEALTH

Environmental health is related to products that aim at answering the connection between personal health and the health of the planet and goes broader than the topic of sustainability.

79%

of global consumers, when they think about health, they think about community livability (healthy planet)*



VEGAN SCRAMBLED EGGS



OAT-BASED YOGURT DRINKS



PLANT-BASED FROZEN YOGURT



PROBIOTIC PLANT-BASED BEVERAGES



PLANT-POWERED DOG FOOD



HEALTH TOPICS

MENTAL

Mental health is related to products that aim at providing functional solutions to how customers feel. Products that are designed to offer functional benefits related to improving cognitive function, reducing stress, or improving sleep.

44%

of global consumers are quite to extremely concerned for their mental wellbeing, reaching 55% for the 18-24 age group*



SNACKABLE SMOOTHIE BITES



REST-PROMOTING ADAPTOGEN BLENDS



MENTAL PERFORMANCE ENERGY BLENDS



BRAVE-NEW-INGREDIENT

A curated selection of some of the most unusual product ideas to inspire creativity and give us a preview of what the future may hold.

PONOVA™ CULINARY OIL



- High in Omega 9
- Non-GMO
- Traceable supply chain
- Fair Trade

25%

In the UK, 25% of yellow fats and oil consumers are interested in sustainably sourced edible oils

Pongamia oil, known as Ponova™, is extracted from Pongamia “super-trees”. Developed by Terviva, Ponova™ has revolutionised the use of vegetable oils and the practice of regenerative agriculture. With new regulations related to deforestation, the ingredient represents an opportunity for product (re)formulation, among others.

The oil is obtained from the seeds of the climate-resilient Pongamia tree, which has historically been used for reforestation in Asia. This tree traps carbon while improving the health of the soil and the quality of the water. Since they naturally resist pests and require minimal water, they are highly durable, low maintenance, and environmentally friendly. The oil has been utilised in Ayurvedic medicine and cosmetics for countless years, but it has only lately been used in food.

Ponova™ oil is a lightly refined vegetable oil and a plant-based ingredient that revitalizes the soil and enriches the lives of the community who cultivate it, if combined with ethical and traceable supply chain. The end-product is a neutral oil with a buttery feel that enhances food texture.

BRAVE-NEW-TECHNIQUE/SHOPPING EXPERIENCE

A curated selection of some of the most unusual product ideas to inspire creativity and give us a preview of what the future may hold.

AIR FRIED

#airfryer

8.9B views on TikTok*

42%

Growth in “air-fried” on-pack communication, 2022 vs 2021**



Air-fried foods have grown in popularity since their introduction in 2010, as health-conscious customers become more aware of which ingredients and cooking techniques are the healthiest. The cost-of-living crisis has further influenced this boom as the technique offers a more energy-efficient cooking method than conventional ovens and grills. As customers become more informed about healthy ingredients and cooking methods, brands are becoming more aware of how they can prepare and label their products in order to appeal to the educated consumer.

With a growing number of consumers using air fryers at home, brands are releasing products specifically designed for air-frying. Packaged food products are also being marketed as air-fried to attract health-conscious customers. The air fryer aisle at one London store of The Food Warehouse, part of Iceland, is a trial, but it signals a permanent change in supermarket design. The first of its kind, there will be nearly 300 products in the air-fryer speciality aisle. Additionally, products with air frying instructions will be available in all stores from the banner.

*Source: TikTok-#airfryer up until June 2023, **Mintel GNPD_Product Description “Air fried”_full year 2022 vs 2021

Health is key driver of future food product development

By Elizabeth Green and based on Innova Market Insights - 07-Jul-2023

Extracted from Food Ingredients First

Despite the current atmosphere of financial uncertainty and the cost-of-living spiraling, consumers surveyed by Innova Market Insights revealed that health is the number one driver of future F&B product development. Notably, consumers of all demographics and income levels prioritize health over affordability, among other factors.

“Health benefits remain at the top of the list for consumers, even in financially challenging times,” says Lu Ann Williams, global insights director at Innova Market Insights.

Consumer food choices involve a “weighted balancing” of a number of factors such as cost savings, health messaging, sustainability and indulgence. “How each factor is weighted depends on culture, country, income level, product category and a host of other revolving factors. Certainly, health and well-being remain a top spending priority for consumers, with the primary goal of healthier living and following a healthy, nutritious diet,” said Williams.

Health amid inflation

She added, “Health and well-being remain a top spending priority for consumers, with the primary goal of healthier living and following a healthy, nutritious diet. Price tends to play a bigger role in food choices during times of inflation and economic uncertainty and consumers plan to compensate most by buying lower-cost items.”

“Three in five North American consumers surveyed by Innova Market Insights in 2023 report that they are looking for simple and more affordable nutritional solutions to meet their needs, and nearly half agree that it is difficult to eat healthily because nutritious foods are less affordable.”

COVID-19 impacts health

“Since the pandemic, more and more people have been struggling with their mental health and going forward, there will be a rising demand for ways to deal with this,” Williams noted. “Aging well” is also a top consumer driver for adopting a healthier lifestyle, rising in importance with age. Consumers will continue to have more significant control over their health with access to more information and tools.”

Future food

Furthermore, she flagged the fact that plant-based is still struggling in some markets, but that it’s here to stay as health remains a key driver. “It’s the beginning of the beginning, and we are learning what works and what doesn’t. The industry is looking for ingredients that will help plant-based delivery of taste and texture because this is still a barrier.”

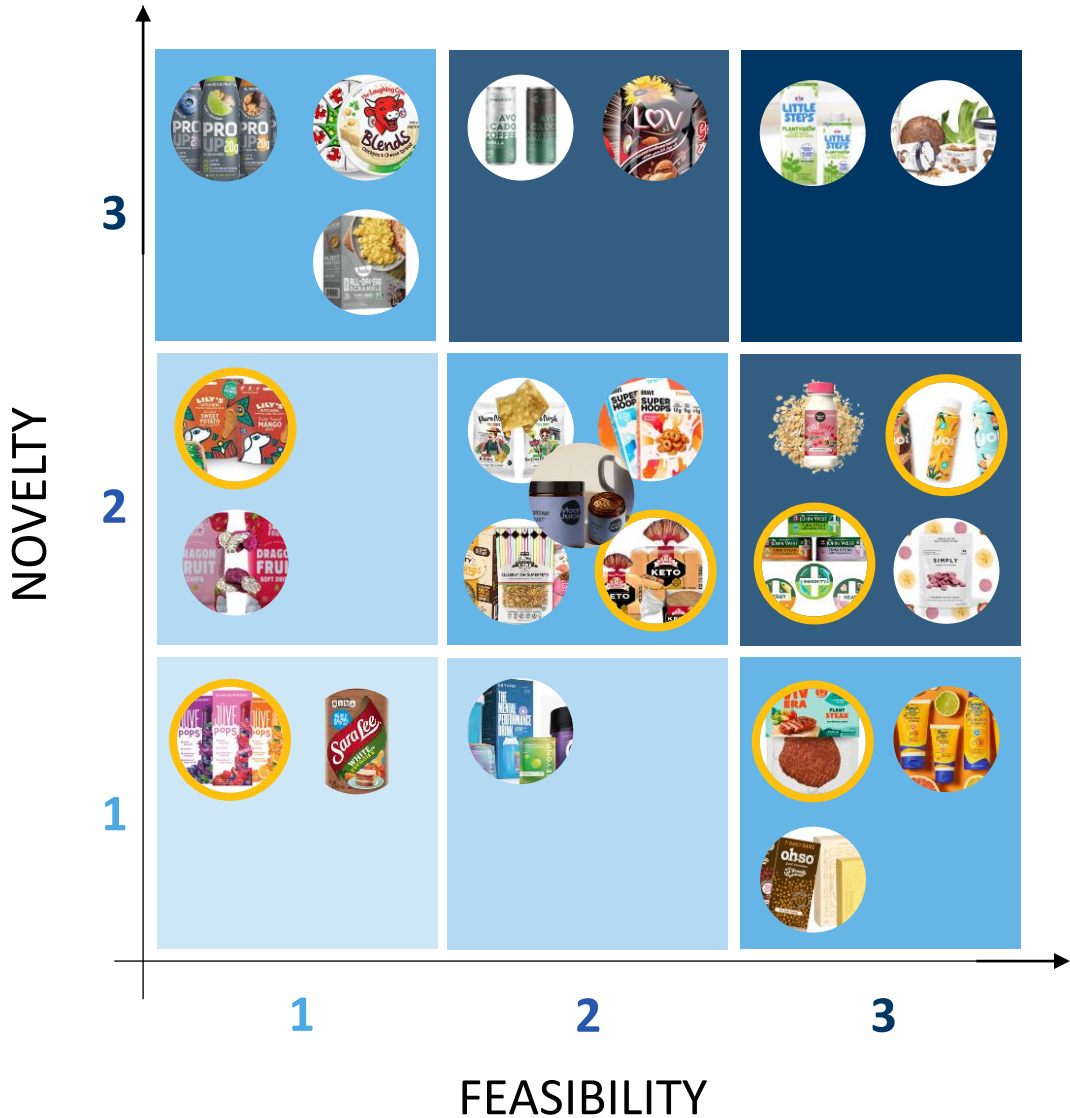
Moreover, interest in botanicals for health is prevalent in the area of gut/digestive health and immunity and even for detoxifying the body. “Probiotic and prebiotic ingredients are increasingly recognized in the world of gut health and continue to perform well within NPD,” she concluded, adding that, “In recent years, postbiotics have emerged as the next stage in biotic development.”

*Source: Food Ingredients First

INNOVATION MATRIX

Nutritive and Environmental health

Highlighted products have the highest **APPEAL**



The Innovation Matrix shows all product concepts from the edition along with their KPIs in a graphic format (novelty, feasibility, and appeal).

It allows for both a targeted selection of the product concepts and the comparison of several concepts based on how inventive they are.



FEATURED CONCEPTS

PHYSICAL: NUTRITIVE HEALTH

Nutritive health is related to products that aim at bringing a balanced and healthy lifestyle, focused on making sure that consumers eat a wide variety of foods in the right proportions and provides the body with essential nutrition.

VEGGIE-RICH BREAD

FEATURED IN 19th EDITION



Consumers today are increasingly conscious of their health and the value of a balanced diet in enhancing well-being. In light of this, numerous conventional products have undergone re-formulations to add more nutrients to enrich consumers' diets. A good example, are vegetable bread loaves - enhancing nutritional value and adding extra vitamins to a type of food that can be eaten throughout the day at various meals. For people who struggle to increase their daily vegetable consumption, such options might substantially simplify their lives.

DAYMON TRENDS



KPIs*

NOVELTY



APPEAL



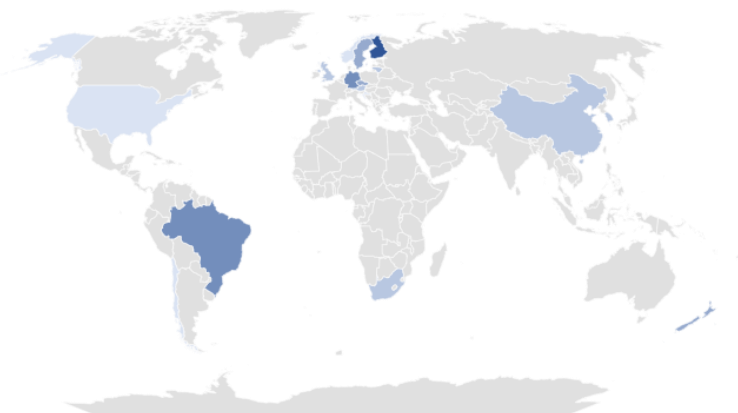
FEASIBILITY



*KPI scores from Daymon experts

Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

INTERNATIONAL REACH



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COATED SUNFLOWER SEEDS

FEATURED IN 19th EDITION 



Because they are so rich in minerals and vitamins, sunflower seeds are excellent snacks and have numerous health advantages.

These seeds are typically eaten in their natural state or with some flavours or salt added, but now they have a novel twist. A savoury coating that adds more taste and crunchiness and demonstrates how small changes can give everyday snacks a novel and unexpected texture and flavour.

DAYMON TRENDS



KPIs*

NOVELTY



APPEAL

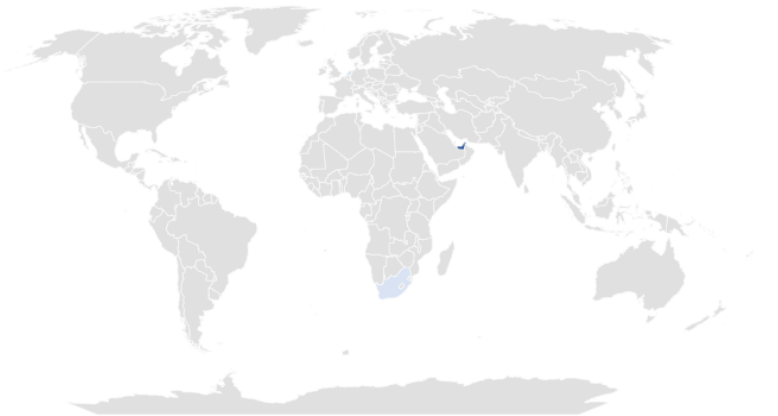


FEASIBILITY



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PLANT-BASED TODDLER DRINKS

FEATURED IN 19th EDITION 



The number of customers adopting plant-based diets has increased due to environmental and/or health concerns.

New drinks can be developed so that these customers, that are also parents, can pass along their habits to their kids and assist them in making the switch to a more plant-based routine. A solution that was created specifically with toddlers in mind, taking into account their unique nutritional requirements. This kind of solution addresses both parents' values and lifestyles and toddlers' specific needs.

DAYMON TRENDS



KPIs*

NOVELTY



APPEAL



FEASIBILITY



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AVOCADO COFFEES

FEATURED IN 19th EDITION



Avocado has been in the spotlight for some time, being popular not only for its good taste but also for its healthy fats and nutrients. So too, milk alternatives have also become increasingly popular, as vegan and flexitarian dietary habits grow.

Avocado milk therefore seems to be the ideal ingredient for a product such as avocado coffee – a coffee that boasts healthy fats and is nut-free. It represents an excellent choice for those who seek a tasty coffee with added benefits and a whole new flavor experience.

DAYMON TRENDS



KPIs*

NOVELTY



APPEAL



FEASIBILITY

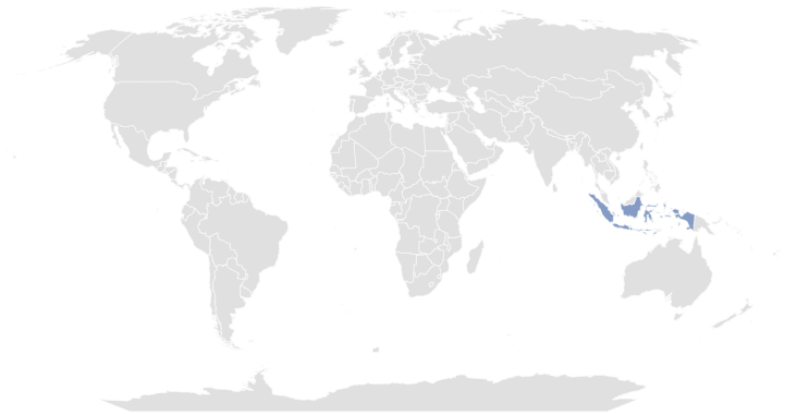


* fooddive.com 2021

** KPIs score from Daymon Experts

Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

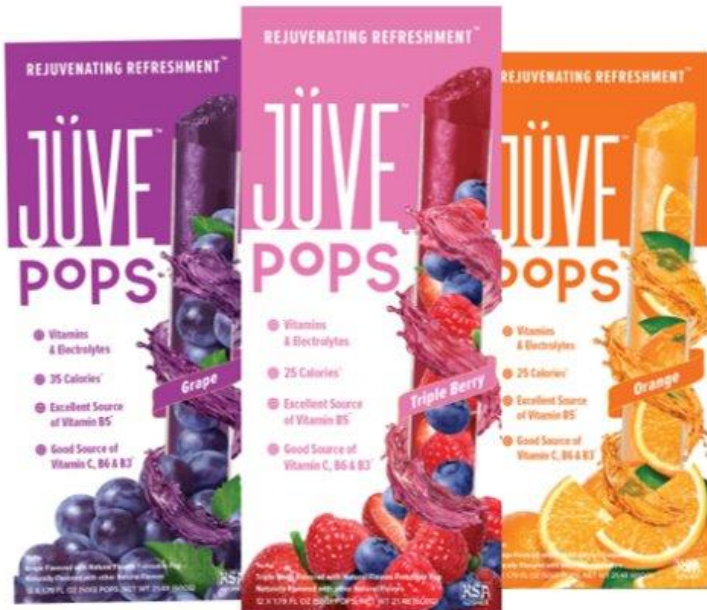
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ELECTROLYTE-PACKED FREEZER POPS

FEATURED IN 19th EDITION 



Functional claims are appealing to different categories across the store, including frozen treats. Electrolytes are essential for the healthy functioning of our bodies introducing calcium, potassium and sodium, common types of electrolytes. These are already being included in water and other functional drinks.

Freezer Pops with electrolytes represent an opportunity to add electrolytes and minerals to consumer diets. By introducing electrolytes into fruity pops, it enhances the functionality of frozen treats.

DAYMON TRENDS



KPIs*

NOVELTY



APPEAL



FEASIBILITY



* Globaldata Q2 2021

** KPIs score from Daymon Experts

Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

INTERNATIONAL REACH



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TOFU CHIPS

FEATURED IN 17th EDITION



Chips are a delicious and easy-to-eat snack. The various ranges are often made of potatoes or other vegetables, with different flavor options. Tofu chips have recently joined the market as a novel flavor and formulation variation.

Tofu is a popular protein-rich ingredient among vegans and vegetarians. Using it as the base ingredient for chips, opens the door to new flavor experiences that appeal to a wide range of consumers. From those looking for flavor sensations to those who prefer healthier options - free from specific ingredients.

DAYMON TRENDS



KPIs*

NOVELTY



APPEAL



FEASIBILITY



* Mintel 2021

** KPIs score from Daymon Experts
Novelty and Appeal KPI's based on similar concepts already observed in the mass market.

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CHICKPEA & CHEESE SPREAD

FEATURED IN 16th EDITION 



Cheese spreads are a great source of nutrition and enjoyment and an excellent snacking option. With the growth of flexitarian diets, animal-based industries can deliver blended products that combine animal protein with plant-based protein and in so doing, exploring new flavour options.

There is an opportunity to develop cheese spreads that reinforce their protein content by bringing together two familiar products - cheese and chickpeas - a popular food among vegetarians and vegans and the base product for hummus.

DAYMON TRENDS



KPIs*

NOVELTY



APPEAL



FEASIBILITY

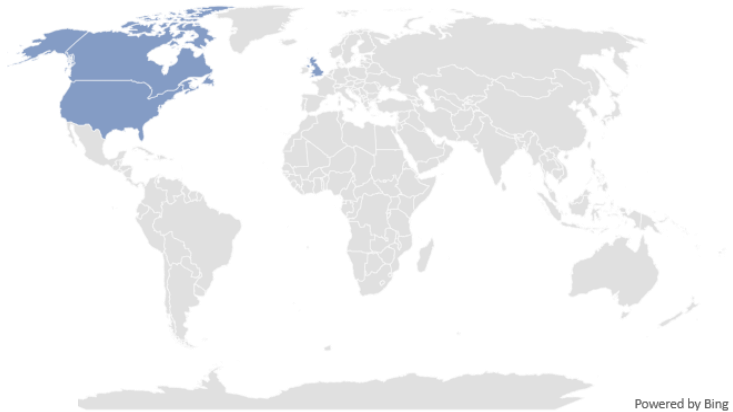


* Mintel 2021

** KPIs score from Daymon Experts

Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

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PHYSICAL: FUNCTIONAL HEALTH

The Functional Topic relates to products that aim at bringing additional benefits and functionalities to consumers. These enhanced products tend to be easy to consume when taking into consideration the added benefits, the aim is to make functionality easy to access.

HIGH-PROTEIN CEREAL MADE FROM PULSES

FEATURED IN 19th EDITION



For those who enjoy cereals but look for grain-free versions, there is an opportunity to provide new product solutions that, in spite of the name, don't contain cereals and that bring a combination of fibre and protein from peas, chickpeas, and chicory.

These "cereals" offer grain, whey, or soya-free choices thanks to this mix, which also makes them low in sugar and carbohydrates. As the world fights more and more for healthier versions of popular foods, with less sugar and allergens, these can become a perfect choice for many consumers.

DAYMON TRENDS



KPIs*

NOVELTY



APPEAL

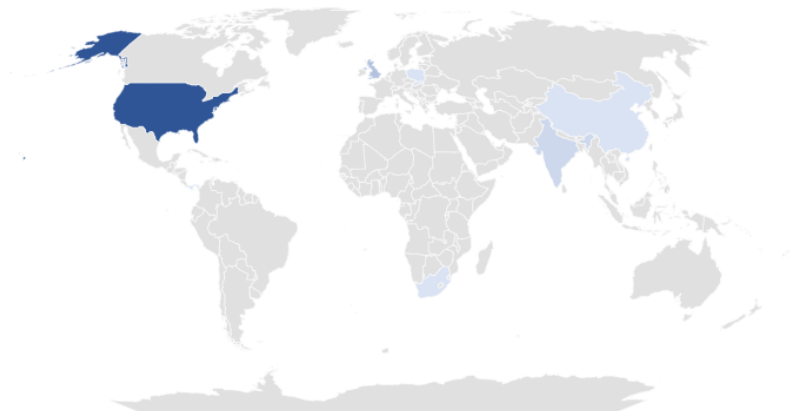


FEASIBILITY



*KPI scores from Daymon experts
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EGG WHITE SPORTS DRINKS

FEATURED IN 19th EDITION



Sports drinks are a crucial dietary supplement for people who want to work out and want to perform at their best.

In their honour, a brand-new idea for dairy-free beverages that are prepared with egg whites and packed with protein, a crucial component of healthy muscles, has been developed. Although those who are health-conscious tend to use these goods more frequently, those who want to enhance their protein consumption can also gain tasty benefits from them.

DAYMON TRENDS



KPIs*

NOVELTY



APPEAL

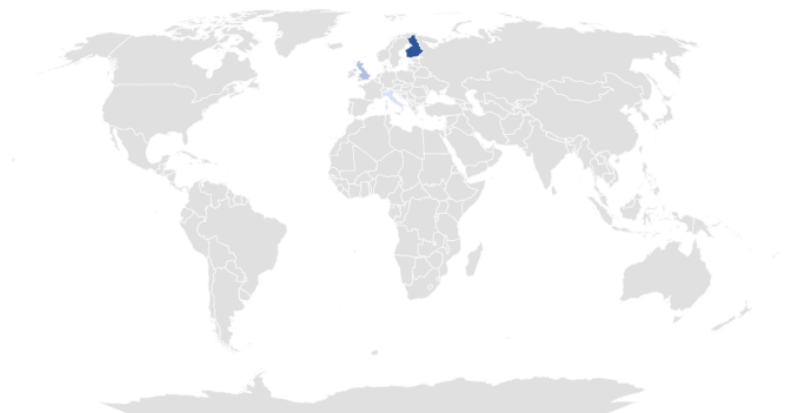


FEASIBILITY



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DRAGON FRUIT SNACK

FEATURED IN 17th EDITION



Today's consumers look for flavourful yet health-conscious options when looking for snacks. Dried pitaya snacks, also known as dragon fruit – can be the product that consumers are craving.

Dragon fruit is known to be a superfood for its high fibre content, vitamins, antioxidants and other beneficial elements. Combined with its exotic appearance and the fact that it is a relatively uncommon fruit to find in supermarkets - makes it an exciting snack for curious consumers and for those who enjoy health-conscious snacking.

DAYMON TRENDS

INTERNATIONAL REACH



KPIs*

NOVELTY



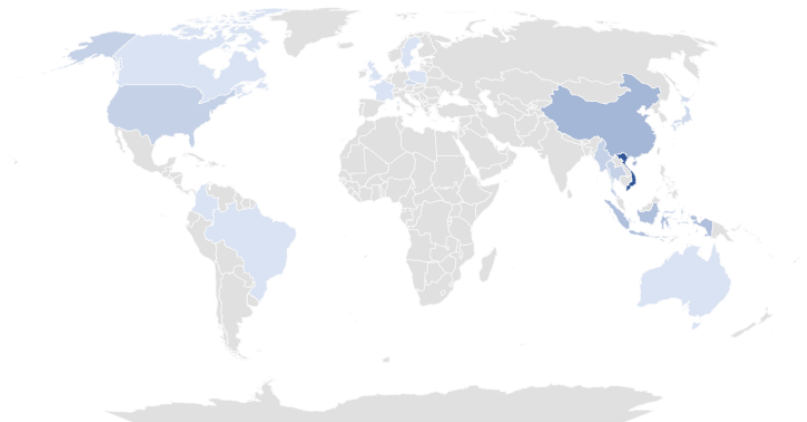
APPEAL



FEASIBILITY



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PROBIOTIC PLANT-BASED BEVERAGES

FEATURED IN 15th EDITION



Given that 19% of the global population claim to be actively attempting to boost consumption of plant-based dairy alternatives* - adding probiotics to the formulation can be an ideal way to increase its appeal.

In addition to incorporating plant protein, adding probiotics to plant-based drinks allows consumers to enjoy the health benefits that probiotics offer, such as improved digestion, reduced inflammation, and immune system support without having to rely solely on dairy products. As for dairy drinks – different flavours enlarge the offering and trigger excitement.

DAYMON TRENDS



KPIs*

NOVELTY



APPEAL



FEASIBILITY

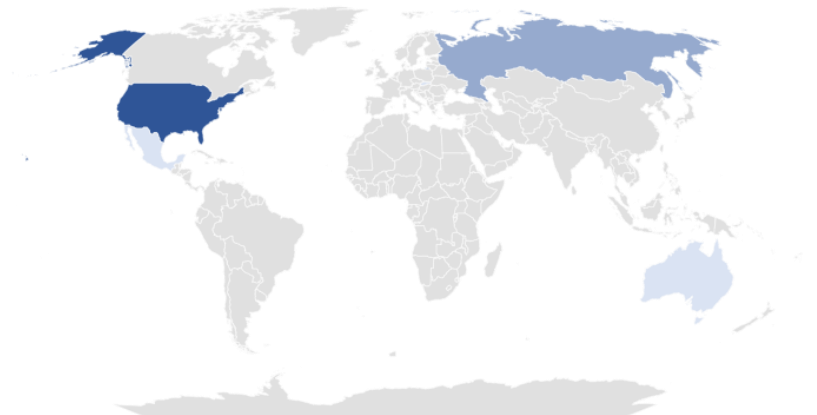


* Globaldata Q3 2019

** KPI score from Daymon Experts

Novelty and Appeal KPI's based on similar concepts already observed in the mass market.

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FUNCTIONAL TUNA CANS

FEATURED IN 15th EDITION



Functionality is gaining traction across categories, with consumers looking to incorporate more functional foods into their meals. Since the Covid-19 pandemic, people have been on the lookout for food that provides more than just nutrition.

Many of the ingredients are inherently functional, such as tuna which is naturally high in Omega-3 fatty acids. Promoting awareness around additional functional benefits such as contributing to healthy energy levels or a robust immune system, may entice consumers to buy canned tuna more regularly.

DAYMON TRENDS

INTERNATIONAL REACH



KPIs*

NOVELTY



APPEAL



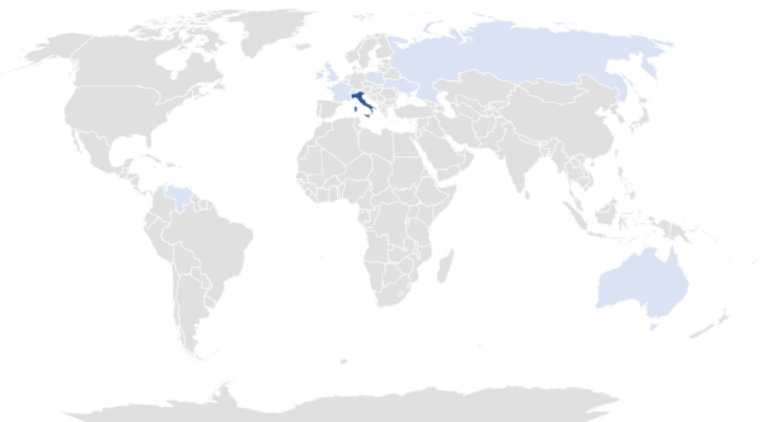
FEASIBILITY



* Globaldata Q3 2019

** KPI* score from Daymon Experts

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PET SUPERFOOD SPRINKLES

FUNCTIONAL HEALTH



Pets have been humans' companions for years and as pet owners increasingly 'humanise' their pets, their focus on health has further spilled over. People are spending extra time on their pet's personalised well-being and treating them with little indulgencies.

We have seen the pet cupcake mix in Edition 17 which explored new treat experiences for pets. These superfood sprinkles and toppers build onto the theme of pet health with their additional health benefits and appetite-enhancing formulations.

DAYMON TRENDS

INTERNATIONAL REACH



KPIs*

NOVELTY



APPEAL



FEASIBILITY



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Novelty and Appeal KPIs based on similar concepts already observed in the mass market.



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VITAMIN-ENRICHED SUN PROTECTION

FUNCTIONAL HEALTH



Sunscreen, often known as sunblock or sun lotion, is primarily used to prevent sunburn and skin diseases. Moisturisers and other inactive ingredients can have an impact on how well the sunscreen applies and dries.

Recently, there has been a greater focus on other ingredients with a focus on skin health. These multifunctioning SPF's with vitamin enrichment aim to nourish, hydrate and rejuvenate the skin whilst providing UV protection. The opportunity exists across application formats (sprays, lotions etc.) and pre- and post-sun exposure.

DAYMON TRENDS

INTERNATIONAL REACH



KPIs*

NOVELTY



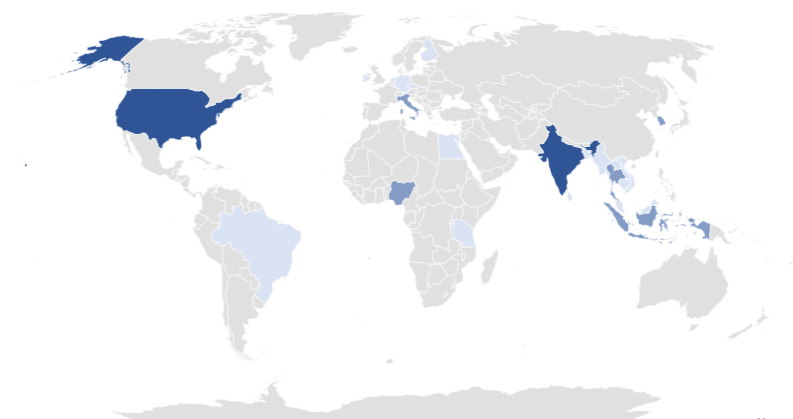
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FEASIBILITY



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KETO FRIENDLY BAKERY

FUNCTIONAL HEALTH



There are a variety of reasons why consumers follow lifestyle diets, whether they are reacting to an existing health issue or proactively thinking about their future health. Specialised diets continue to evolve to address good food and nutrition while also protecting against illness and disease.

Bakery industry players are starting to associate themselves more and more with diets like Keto (high fat, moderate protein and low-carb), to differentiate their product offering and by giving ketogenic consumers the choice to keep eating bread.

DAYMON TRENDS



KPIs*

NOVELTY



APPEAL

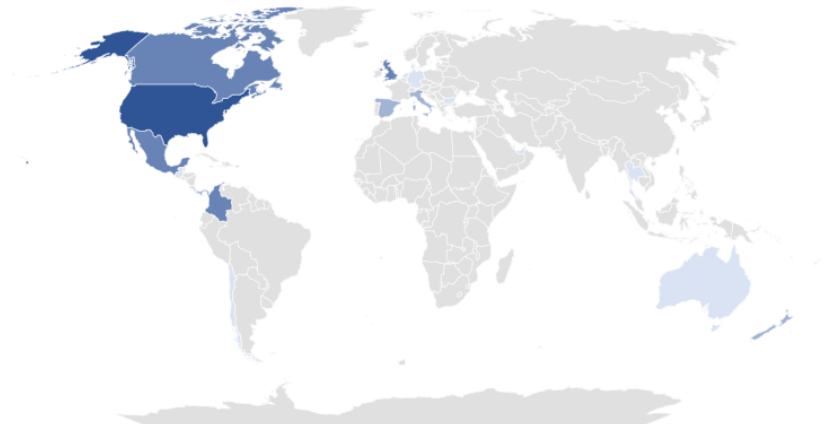


FEASIBILITY



*KPI scores from Daymon experts
Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

INTERNATIONAL REACH



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GUT-FRIENDLY CHOCOLATE

FUNCTIONAL HEALTH



Health-conscious consumers are looking to balance indulgence with nutrition, searching for products that answer their “in the moment” need rather than completely eliminating indulgences.

Chocolate brands can incorporate ingredients that improve gut health with the claims of the addition of live cultures, probiotics and prebiotics, and ingredients that are beneficial to gut bacteria, gaining visibility on the pack. These products represent the best of both worlds - tasty treats with added health advantages.

DAYMON TRENDS

INTERNATIONAL REACH



KPIs*

NOVELTY



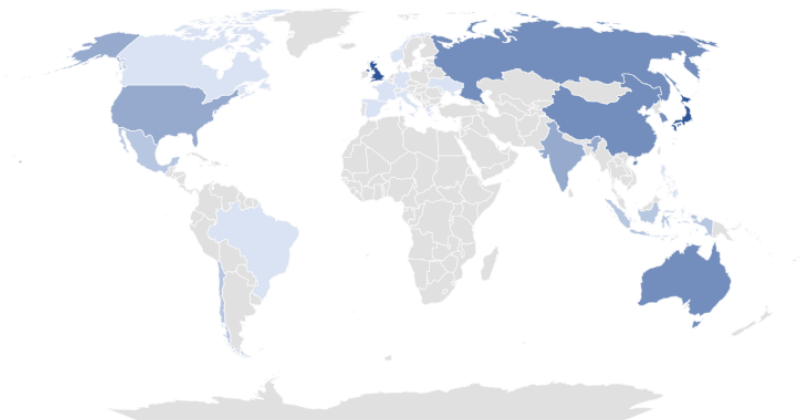
APPEAL



FEASIBILITY



*KPI scores from Daymon experts
Novelty and Appeal KPIs based on similar concepts already observed in the mass market.



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LIDL'S SKINCARE AWARENESS CAMPAIGN

FEATURED IN 19th EDITION



The risks of unprotected sun exposure is well documented and sensible sunscreen use is required to avoid the potential health risks. Despite this, many people fail to apply sunscreen every time they are exposed to the sun or fail to reapply it every couple of hours as recommended. Knowing this, Lidl Belgium decided to intervene and conducted a unique campaign in August 2021.

The purpose was to increase awareness about skin cancer and the significance of wearing sunscreen. Lidl made available sunscreen dispensers on popular Belgium beaches and inland locations where people like to gather outdoors. Lidl used its Cien Brand and related products for the campaign.

Aside from providing Cien products for free to trigger a trial period, they also awarded discount vouchers for their sun care goods and offered sun protection advice.

DAYMON TRENDS



ENVIRONMENTAL HEALTH

ENVIRONMENTAL HEALTH IS RELATED TO PRODUCTS THAT AIM AT ANSWERING THE CONNECTION BETWEEN PERSONAL HEALTH AND THE HEALTH OF THE PLANET AND GOES BROADER THAN THE TOPIC OF SUSTAINABILITY.

SUNFLOWER SEED MILK

FEATURED IN 19th EDITION



In recent years, numerous vegan egg substitutes, mostly in liquid form, have been introduced. However, making the ideal scrambled eggs with vegan substitutes is still a difficult task to accomplish. Vegan scrambled eggs that are ready to eat, address this need.

Such products can be ideal not only for vegan consumers but also for health-conscious people who have fast-paced lives and enjoy quick solutions without needing preparation time. Ready-made vegan scrambled eggs are an excellent option for making consumers' daily lives easier.

DAYMON TRENDS



KPIs*

NOVELTY



APPEAL



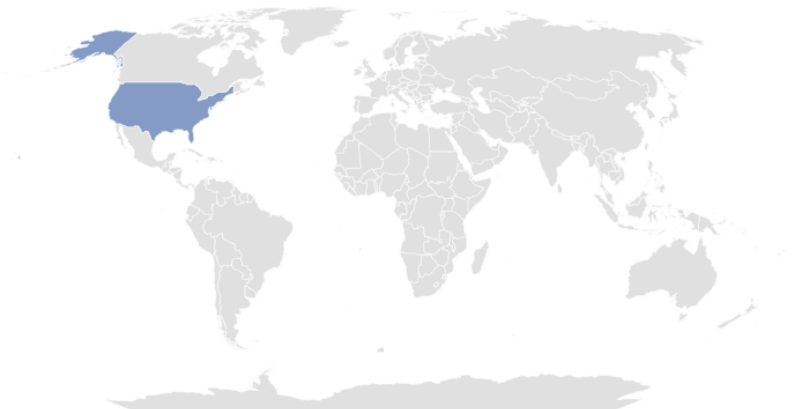
FEASIBILITY



*KPI scores from Daymon experts

Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

INTERNATIONAL REACH



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OAT-BASED YOGURT DRINKS

FEATURED IN 19th EDITION 



Plant-based alternatives are widely available, and people are increasingly eager to test them and include them into their diets. Some products, particularly those made of soy, have become more prevalent in the yogurt sector.

Oat-based yogurt drink varieties provide a new chance to broaden the selection for customers seeking comprehensive dairy-free solutions. Depending on the formulation, these oat-based products can also be low in sugar, and rich in vitamins and probiotics, thereby appealing to a variety of consumers.

DAYMON TRENDS



KPIs*

NOVELTY



APPEAL

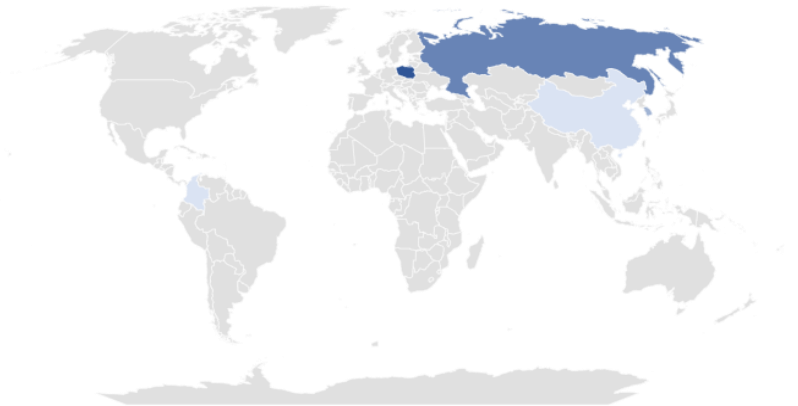


FEASIBILITY



*KPI scores from Daymon experts
Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

INTERNATIONAL REACH



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PLANT-BASED FROZEN YOGURT

FEATURED IN 17th EDITION 



In recent years vegan ice cream and sorbet options have taken over frozen sections. Yet, consumers, when looking for an indulgent tasty ice cream moment, are also looking for healthier solutions. This is where plant-based frozen yogurts come into play.

Frozen yogurts are an appealing option to those wanting to opt for a healthier alternative to ice cream or those who simply want to stay away from animal-derived products. Frozen yogurts provide an opportunity for players to develop comprehensive ranges, bringing frozen yogurt assets to frozen plant-centric solutions.

DAYMON TRENDS



KPIs*

NOVELTY



APPEAL



FEASIBILITY



* Mintel 2021

** KPIs score from Daymon Experts

Novelty and Appeal KPI's based on similar concepts already observed in the mass market.

INTERNATIONAL REACH



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REAL PLANT-BASED MEAT

FEATURED IN 17th EDITION 



Meat categories were amongst the first to explore the plant-centric trend with imitations of processed meat such as sausages and burgers. Efforts were made to improve the taste while also maintaining the protein content.

Recently, the industry has been able to create products that explore flavour and texture while maintaining the overall experience of eating meat. It is now possible to produce for instance beef alternatives for wagyu and sirloin steaks. With an increasing number of consumers wanting to reduce their meat consumption, such solutions should encourage real meat-eaters to try plant-based alternatives.

DAYMON TRENDS



KPIs*

NOVELTY



APPEAL



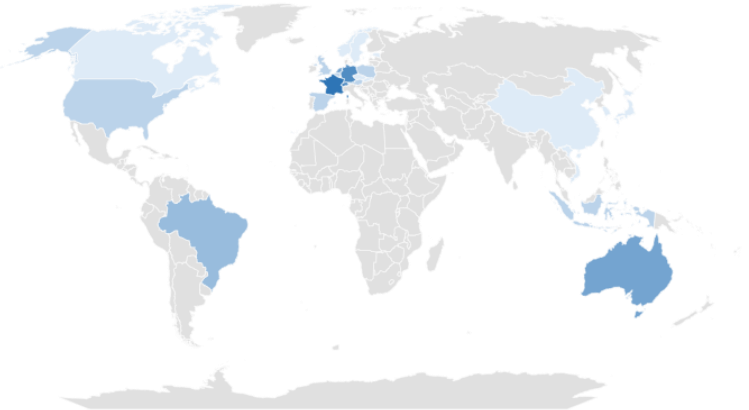
FEASIBILITY



* Mintel 2019

** KPIs score from Daymon Experts
Novelty and Appeal KPI's based on similar concepts already observed in the mass market.

INTERNATIONAL REACH



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PLANT-POWERED DOG FOOD

FEATURED IN 15th EDITION 



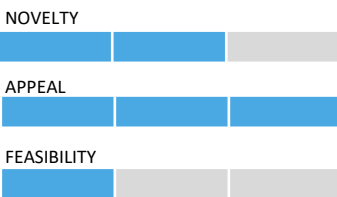
Plant-based diets have been booming around the globe across all categories. Pet owners are now able to offer their dogs nutritious and complete vegan options.

One example is Edgard Cooper's vegan range, which ensures dogs receive all the nutrients they need, such as protein. Besides being an easy way to reduce meat consumption amongst dogs, plant-based food is an environmentally-friendly option. Edgard Cooper claim that its vegan recipes create 43% less CO2 emissions**.

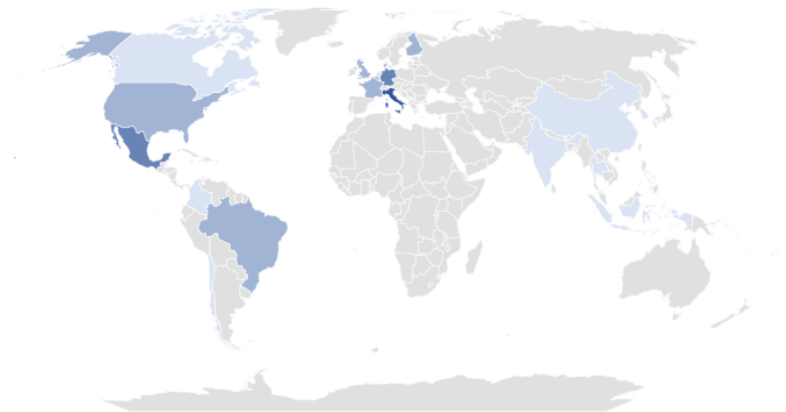
DAYMON TRENDS



KPIs*



INTERNATIONAL REACH



* Mintel 2021

** edgardcooper.com

*** KPIs score from Daymon Experts

Novelty and Appeal KPI's based on similar concepts already observed in the mass market.

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MENTAL

Mental health is related to products that aim at providing functional solutions to how customers feel. Products that are designed to offer functional benefits related to improving cognitive function, reducing stress, or improving sleep.

SNACKABLE SMOOTHIE BITES

FEATURED IN 17th EDITION



Snacks have been labeled as a guilty pleasure suffering from a bad reputation as many people reach for crisps, and sugary products to snack on. However, snacks have recently been reinvented in light of a better understanding of the impact diet has on health.

Snackable smoothie bites are a healthier snack option as they contain a combination of fruit that has been compacted together, providing a more natural and nutrient-rich alternative. These snacks are not only 100% fruit-based, but they are also shelf-stable to extend shelf life.

DAYMON TRENDS



KPIs*

NOVELTY



APPEAL



FEASIBILITY

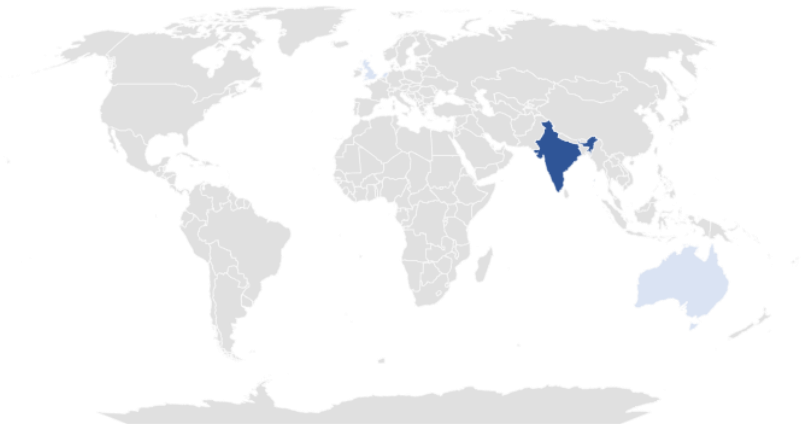


* Mintel 2021

** KPIs score from Daymon Experts

Novelty and Appeal KPI's based on similar concepts already observed in the mass market.

INTERNATIONAL REACH



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REST-PROMOTING ADAPTOGEN BLENDS

FUNCTIONAL HEALTH



Consumers searching for ways to combat stress and boost mental health have shown a growing interest in adaptogen products. Adaptogenic ingredients such as ashwagandha, tulsi and licorice, aid in promoting rest and reducing stress and tension.

Adaptogenic beverages were featured in Edition 5 and we have observed the uptake in the powdered beverage mixes category. These concentrated powders enable dilution with water/milk/tea as well as repeat servings, providing a healthy and convenient solution to contribute to the planet's health by acting on carbon footprint.

DAYMON TRENDS

INTERNATIONAL REACH



KPIs*

NOVELTY



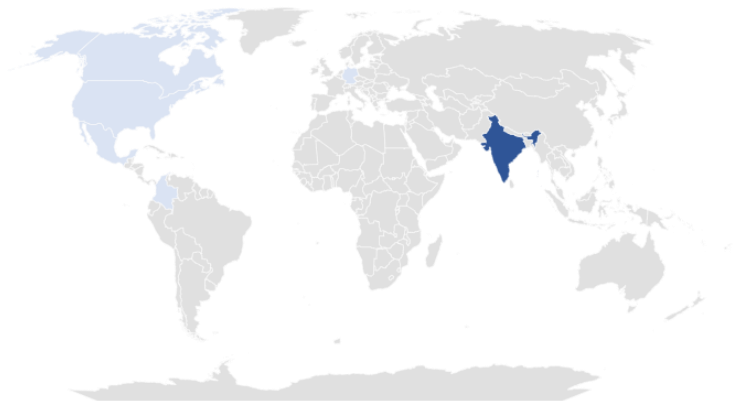
APPEAL



FEASIBILITY



*KPI scores from Daymon experts
Novelty and Appeal KPIs based on similar concepts already observed in the mass market.



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MENTAL PERFORMANCE ENERGY BLENDS

MENTAL HEALTH



The post-pandemic consumer is more focused on improving certain aspects of health, such as cognitive ability. The prevalence of nootropic substances has expanded in recent years in response to increasing demand for improved attention, focus, and mental energy.

Supplement industry players across regions are providing solutions that answer to improved mental functioning, said to include thinking, memory, mood, attention, creativity, and motivation.

DAYMON TRENDS

INTERNATIONAL REACH



KPIs*

NOVELTY



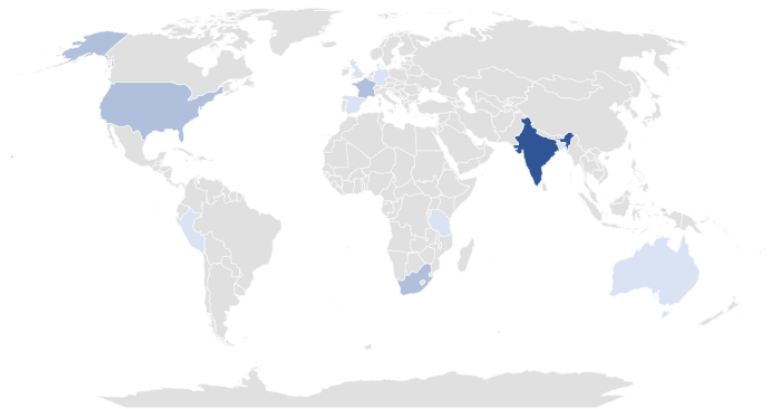
APPEAL



FEASIBILITY



*KPI scores from Daymon experts
Novelty and Appeal KPIs based on similar concepts already observed in the mass market.



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CONCEPT TO SHELF

A selection of concepts presented in previous editions of the Innovation Report that are now available on the shelves.

IMMUNITY TEA

FEATURED IN THE 7th EDITION

Tea serves different purposes. Many ingredients found in tea such as ginger, turmeric, green tea, echinacea or elderberry can be used to boost the immune system and serve a functional purpose for consumers looking for natural functional products to become part of their routine.

With the pandemic, consumers began looking for products that strengthen their immune system as well as complimenting their daily intake of food and beverages. Therein lies the opportunity to create a natural tea range which meets the desired healthy living criteria.



**NOW
SEEN IN
PB**

Retailer: Aldi
Country: USA
Brand: Simply Nature Organic



SOURDOUGH SLICES

FEATURED IN THE 16th EDITION

As consumers become more health-conscious - more attention is given to the ingredients used and the production processes applied. Bread has become more popular once again, in part, thanks to sourdough.

Sourdough bread is known for its healthy gut benefits and as a lower-gluten option. It is a naturally leavened bread that uses wild yeast and good bacteria, instead of using commercial yeast. This process gives the bread a sour taste, a chewy texture and specific health benefits as it is easier to digest and has a lower glycemic index.



**NOW
SEEN IN
PB**

Retailer: Aldi
Country: Australia
Brand: Bakers Life



A selection of concepts presented in previous editions of the Innovation Report that are now available on the shelves.

FUNCTIONAL ICED TEA

FEATURED IN THE 16th EDITION

The trend of adding functional benefits to food and drinks is especially relevant when it comes to non-alcoholic beverages. Iced tea is a new addition to this category. By adding vitamins and minerals, iced tea can now be positioned as a functional drink that provides health and wellness benefits to consumers such as fatigue relief, stress relief or as an immunity booster.



These functional iced teas could be an interesting option for individuals wishing to add functional benefits to the products they already consume.



**NOW
SEEN IN
PB**

*Retailer: Jumbo
Country: Netherlands
Brand: Jumbo*



ENERGY WATER

FEATURED IN THE 7th EDITION

The wellbeing shift in the energy drinks sector has also resulted in a new crop of energising drinks - energising waters. Combining water as the main ingredient with natural fruit flavours or even tea-based flavours, the energy water is not a stand-alone opportunity and can carry as many SKUs as natural flavours.



These beverages aim to provide consumers with the rehydrating qualities of water and functional qualities of energy drinks.



**NOW
SEEN IN
PB**

*Retailer: Delhaize
Country: Belgium
Brand: Delhaize*



A selection of concepts presented in previous editions of the Innovation Report that are now available on the shelves.

Zero-Salt Stocks

FEATURED IN THE 13th EDITION

Excessive sodium levels in food have been a source of concern for many people due to potential health risks. Consumers are constantly on the lookout for healthier products as they become more aware of the dietary changes they can make to improve their health.

Zero-salt stocks give consumers control over how much salt they consume. The zero-salt option is a healthier alternative to traditional stocks, which are known to contain high levels of salt, which is a source of concern for many. Despite the absence of salt, these stocks ensure that flavor and taste are not compromised.



**NOW
SEEN IN
PB**

Retailer: Wegmans
Country: USA
Brand: Wegmans Food
You Feel Good About



Grain-Free Cookies

FEATURED IN THE 10th EDITION

Allergies, intolerance and a desire to avoid gluten, as well as overly-processed wheat in general, is driving people towards cleaner product solutions. As a result, consumers are shifting towards grain-free diets, negatively impacting snacking products, as these are usually made from grain-based flours.

Grain-free cookies/biscuits made from nuts or seed-based flours are an alternative option to traditional cookies. Made from flours such as coconut, almond or cassava, these cookies should appeal to those consumers aiming for healthy and grain-free snacks.



**NOW
SEEN IN
PB**

Retailer: Aldi
Country: USA
Brand: Benton's



A selection of concepts presented in previous editions of the Innovation Report that are now available on the shelves.

MUSHROOM SNACKS

FEATURED IN THE 12th EDITION

Mushrooms have the image of being both natural and healthy, with medicinal mushrooms such as Shitake or Reishi contributing to this. Mushroom snacks have been growing tremendously over the last few years in Asia, offering a more natural solution to snacks and capitalising on convenient on-the go packaging.

As Asia explores their potential with new flavour combinations and new product types, other regions are starting to invest such as the US and in South Africa with Woolworth's introducing mushroom biltong.



NOW
SEEN IN
PB

Retailer: Trader Joe's
Country: USA
Brand: Trader Joe's



CALMING SWEETS

FEATURED IN THE 7th EDITION

Calming sweets are all about combining the joyment and pleasant feeling of chewing a sweet with the functional attribute of a calming candy. When feeling stressed or anxious, what people eat or smell may help de-stress them. Just like tea, sweets and bubble gums may contain similar ingredients such as chamomile or other variants which help relax the nervous system.

The candy/bubble gum form makes it easier for consumers to have this "remedy" on-the-go and in any situation in a relaxed manner without having to take a pill.



NOW
SEEN IN
PB

Retailer: Target
Country: USA
Brand: Up & Up



A selection of concepts presented in previous editions of the Innovation Report that are now available on the shelves.

PROBIOTIC HOUSEHOLD CLEANERS

FEATURED IN THE 15TH EDITION

Addressing environmental issues can be accomplished through a range of everyday changes, such as using more natural formulations. Household cleaners are often perceived as chemical-based, and more natural alternatives as less efficient.



Probiotic household cleaners position themselves as earth-friendly options without compromising on quality or safety. These products use 'good' bacteria that break down dirt, grease and other residues without the need for toxic chemicals. They are an excellent option for the house, the environment, and people's health overall.



Retailer: Pick n Pay
Country: South Africa
Brand: Pick n Pay
Green

FISH-FREE STICKS

FEATURED IN THE 16th EDITION

As more individuals adopt vegetarian, vegan or flexitarian diets, the need for novel meat and fish substitutes grows. Fish fillets are being developed (Innovation Report Edition 8) and are considered finger food which creates interesting opportunities.



Fish-free sticks are an excellent option for those who want to limit their fish diet without sacrificing their protein intake. This is a plant-based variation of traditional breaded fish sticks with a similar flavour that provides an 'on-the-go' option that is quick and easy.



Retailer: REWE
Country: Germany
Brand: Rewe Beste Wahl



APPENDIX

KPIs USER GUIDE



- All concepts are grouped per *Key Theme*. Next to each picture, there is a link that, when clicked, sends the reader directly to the concept's own page. There, more information about the concept is provided such as Daymon Trends, International Reach, and the Novelty, Appeal and Feasibility KPIs.
- On each concept page, the same link icon is available. When clicked, it will bring the reader back to the corresponding *Key Theme*.



DAYMON TRENDS



Each new concept answers to one or several Daymon trends. The Daymon trend assessment provides a framework for identifying business opportunities.

NOVELTY

Novelty KPI is to understand if the concept has been tested worldwide for several years or if it is recent. Each concept is screened for the last 5 years.

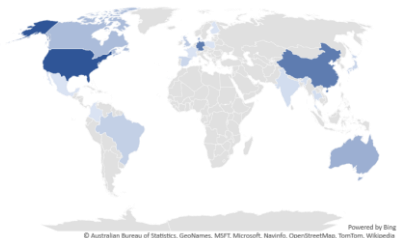
Low Novelty – the concept is being seen for several years, but with growing reach.

Medium Novelty – the concept is being seen for a few years, growing reach.

High Novelty – the concept is new (one year or less).

INTERNATIONAL REACH

The International reach map refers to time and reach. It analyses the number of years per country with similar concepts, the darker the colour implies similar concepts have been launched for longer than in other countries.



APPEAL

Appeal KPI refers to the growth of manufacturers developing the given type of concept for the last 5 years. The appeal is measured on the last 2 years.



Low Appeal – the share of new manufacturers developing the concept is low.



Medium Appeal – the share of new manufacturers developing the concept is between 30% and 60%.



High Appeal – the number of manufacturers and share of new joiners is larger and growing (60% and more).

FEASIBILITY

Feasibility KPI is to understand the level of complexity to develop a similar concept with suppliers (either current supplier or new supplier).

Low Feasibility - the concept is technically complex to co-develop with a supplier. It can also be patented.

Medium Feasibility – the concept requires time to co-develop with a supplier.

High Feasibility – not complex to develop as similar technologies are already used for other concepts.

6 MEGA TRENDS SHAPING WHAT'S NEXT



Societies are transforming, driven by shifting demographics, economic pressures, technology, and a newfound outlook around embracing individual differences. This increasingly diverse population has varying and specific needs, resulting in changing expectations of products and retailers as well as new buying behavior.



Health and Wellness has become a mainstream desire, with evolving and varying definitions across consumers and lifestyles. Consumers have a wide range of wellness aspirations, from simply looking to extend beyond traditional routines to achieving an ideal state of holistic wellbeing. This pursuit is driving demand for total solutions that are tailored to specific lifestyles and unique health needs, without sacrificing overall quality expectations.



As global digital adoption and seamless integration quickly accelerate, the lines between the physical and digital continue to blur. Ease of use, desire for connection, and expectations of “anything, anytime, anywhere” will continue to evolve retail and propel innovation forward across products, services, formats, and experiences – while at the same time demanding awareness of the negative impact of technology.



With historically unprecedented population migration and advances in technology, humanity has become globally linked. Interconnectedness is influencing behaviours towards global environmental issues, social justice concerns, sustainability initiatives, and the desire for community both locally and beyond borders. There is a growing awareness that individual actions affect the whole world, and vice versa, and that these networks are often inherently fragile.



In an increasingly turbulent world, consumers are looking for ways to drive satisfaction and happiness in everyday life – both for themselves and those around them. As a result, demand for products, services and experiences that deliver enhanced engagement, simple joys and empowerment is becoming more pronounced.



The definition of value is evolving, and one size does not fit all. Consumers are assigning value across multiple dimensions based on their personal needs such as quality, transparency, budget, and accessibility to reach a balance. Addressing this balance is key as shoppers are becoming more selective and mindful in their spending.



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