

Trend Watch - July 2020



Where next for immunity support?

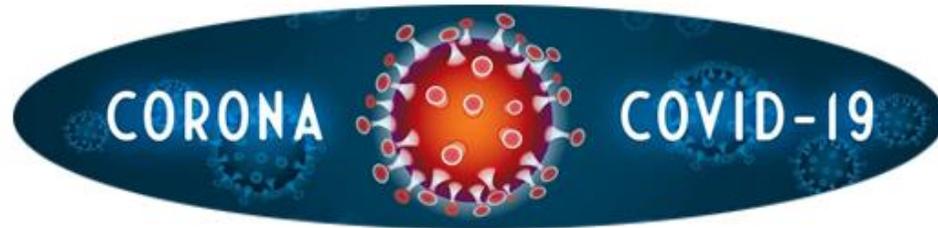
10 functional trends & ingredients to watch in the new normal

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A 'new normal' for immunity support



COVID-19 is a watershed moment for functional foods and beverages. Interest in the category has skyrocketed in the wake of the pandemic, and products associated with supporting the **immune system** – previously a small but steadily growing segment of the market – have been the main beneficiary.

“Interest in **immune system** is up

66% MoM.”

March 2020, Tastewise

The research company Tastewise reports that consumer interest in the immune system shot up by 66% month on month in March, confounding expectations. “As we approach the end of winter, we expect to see less of a focus on this function – but COVID-19 has changed the pattern.”

This comes on the back of **strong existing shopper preferences** for functional products.



[1] Tastewise: Food for immunity? Food for thought during coronavirus, March 2020

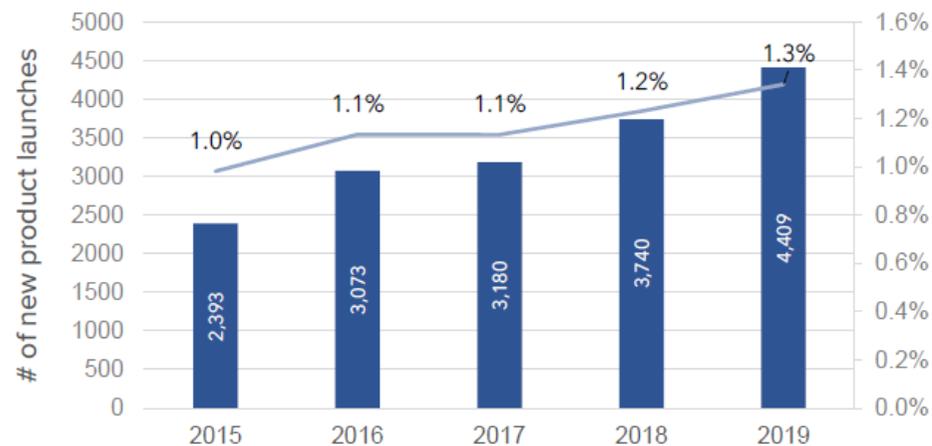
A 'new normal' for immunity support

Steady growth for immune health claims prior to COVID-10

+16.5%

growth rate in new food and beverage launches with a **immune health** claim (Global, CAGR 2015-2019)

Number of new F&B launches tracked featuring an immune health claim and share as percentage (%) of total F&B (Global)



[2] – Innova Immunity boosters: trends overview, 2020

In 2019, one in two global consumers increased their consumption of functional food and drinks, according to research by Innova.

“1 in 2 global consumers increased consumption of functional food/drinks over the past year.”

2019, Innova

With even more consumers making preventative health and wellbeing a priority in the wake of COVID-19, **immunity-focused product innovation** will be a focus for many manufacturers.

The disruption caused by the pandemic has delayed some NPD plans, as manufacturers focus their efforts on maintaining essential manufacturing operations and supplying existing product lines to market.

Therefore, making decisions on NPD in the current climate is no easy feat. Market forecasts are being revised in light of **rapidly changing shopper behaviour** and there is little, if any, visibility on which of the changes will translate into permanent new behaviours.

A 'new normal' for immunity support

Leading functional food and beverage categories in 2019

"Sports nutrition and dairy dominated new functional food products launches during 2019."

"New functional beverage launches during 2019 spanned a diverse range of sub-categories including: vitamin fortified waters, gut health drinks, juices and juice shots, CBD drinks, energy drinks and RTD drinks."

Europe led the way on food and beverage product launches with immune health claims during 2019, boasting over 50% of the total new launches.

"14% of new launches with immune health claims also feature a vitamin/mineral fortified claim."

Global, 2019, Innova

So which **immunity support trends** are likely to stay the course? And what are the **emerging functional trends** that should be on manufacturers' radar right now?

Based on our years of experience in the food and beverage industry and drawing on the findings and forecasts of leading analyst houses, we have put together the **10 trends** we believe will define the 'new normal' for the immunity support market in the coming months and years.

We hope you will find them interesting food for thought!

[2] – Innova Immunity boosters: trends overview, 2020

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Trend 1 – Classic citrus reinvented



Sales of **orange** and other **citrus** juice have soared in the wake of the pandemic, as consumers seek out a hit of vitamin C-rich citrus to support their immune system.

“US orange juice retail sales have risen by 46% year on year.”

Bloomberg, May 2020

Functional citrus pairings to watch

- Clementine, Ginger & Turmeric
- Orange & Cranberry
- Lemon & Lavender
- Yuzu, Ginger & Turmeric
- Lemon & Honey
- Lemon & Rosemary
- Jasmine & Mandarin
- Orange & Cinnamon

High consumer awareness of the health benefits of vitamin C make citrus an ideal platform for engaging consumers on immunity support. But to keep shopper interest high beyond the immediate COVID-19 spike, eye-catching product and flavour innovation will be key.

Promising NPD strategies include adding fibre and probiotics for additional functional benefits and pairing citrus with other on-trend functionals such as **ginger**, **turmeric** and **lavender**.

More unusual citrus, such as **yuzu**, offer further opportunities to provide a fresh twist on the citrus trend.

[3] Bloomberg, May 2020: <https://www.bloomberg.com/news/articles/2020-05-18/orange-juice-prices-soar-with-americans-seeking-immunity-boost?sref=Hhue1scO>

Trend 2 – Botanicals boom

Bumblezest: Fire + Fortify Ginger, Turmeric CBD Drink



Claims: a natural fiery **ginger, turmeric**, CBD drink with a lemon base infused with other botanical ingredients...The vegan drink comprises half a **lemon, black pepper, cinnamon**...only 20 calories, and is described as a **great booster** to drink before a meeting and post work.

June 2019, UK [Mintel GNPD]

Botanical and ‘clean label’ ingredients, such as fruit, herb and spice extracts, are paving the way in the functional beverages’ arena, featuring heavily on front of pack to appeal to consumer demands for health and wellbeing products.

“Botanical ingredients in functional beverages will be seen more and more, with claims around immunity and overall wellbeing shifting the demand from consumers.” *May 2020, Innova*

Grass Fed Iconic Protein: Turmeric Ginger Protein Drink



Claims: ...cinnamon, **ginger** and black pepper that are a natural solution to **inflammation** and **oxidative stress**. **Turmeric** with curcumin are claimed to **support recovery** and **vitality**, while **black pepper** and **cinnamon** enhance **nutrient absorption**.

April 2020, Lebanon [Mintel GNPD]

Pairing and combining ingredients with perceived health benefits is becoming more and more popular in both functional foods and beverages, with established ingredients such as **ginger, turmeric, lemon** and **orange** continuing to see significant growth globally.

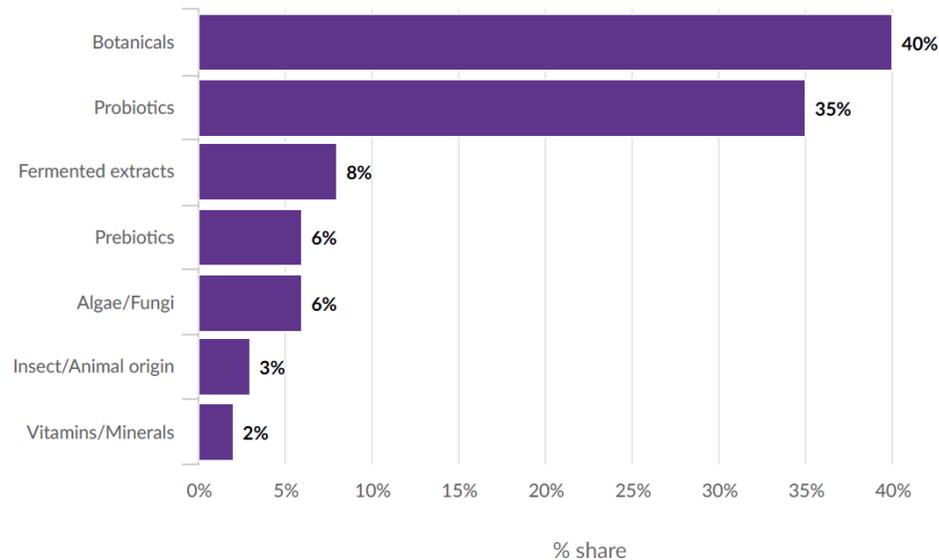
Black pepper and **cinnamon** are also appearing more frequently with various claims around anti-inflammatory effects, nutrient absorption and gut health support.

[4] Innova – Functional Beverages Tap into Consumer Demands for Convenience, Sleep Support and Immune Health – May 2020

Trend 2 – Botanicals boom

Botanicals are the most frequent ingredients cited in food & drink patents to support immune health

Global: % share of patent inventions based on immunity-enhancing ingredients, published between 2010-19



Source: Cipher/Mintel

“Immunity-enhancing functional claims have grown in product launches containing probiotics. In the last five years, manufacturers have increased the incorporation of probiotics into food, drink and healthcare product launches to improve gut health, thereby influencing immune function.” [5]

The number of patent filings for foods and beverages with claims to support immune health has seen steady growth over the last ten years, with botanicals as the most frequently listed ingredients in these products, closely followed by probiotics.

“The numbers of patents for immunity-improving food and drinks continue to increase, with the majority of recent patents focusing on botanicals.”

May 2020, Mintel

The use of botanicals, prebiotics, probiotics and postbiotics in functional foods and beverages is predicted to grow rapidly in line with ongoing scientific research which suggests that the use of these ingredients not only supports normal immune functionality, but can also improve and strengthen the immune system.

In December 2018 Seoul National University had a patent granted claiming the use of **ginger** and **cinnamon** extract in food to improve intestinal health and to enhance immunity.

[5] Mintel – Patent Watch: Boosting Immune Health a Future Focus – April 2020

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Trend 3 – florals get functional

Yocha: Earl Grey & Lavender Stress Away Kombucha



Claims: 100% natural, unpasteurised, gluten-free, contains **live cultures** and is suitable for vegans. The product is the **winner of the Best Health/Wellness Product** Asia Food Innovation Awards 2018, is described as **gut health** in a bottle. Functional – **stress & sleep**.
Mar 2020, Singapore [Mintel GNPD]

Activa: Vanilla-Lavender Active Probiotic Yogurt



Claims: probiotic yogurt with refreshing **natural herb flavours**...feel good from the inside out... contains one billion **active probiotics** per serving, said to contribute to **healthy gut flora**.
March 2020, Canada [Mintel GNPD]

[4] Innova – Functional Beverages Tap into Consumer Demands for Convenience, Sleep Support and Immune Health – May 2020

As consumers get a taste for more adventurous flavours, florals help give immune support foods and beverages an on-trend **multifunctional** edge and a strong point of difference.

“Floral ingredients will also offer a fresh and appealing take in the functional beverage space.” *May 2020, Innova*

COVID-19 has put a huge strain on the **mental health** and **wellbeing** of consumers. ‘Calming’ florals such as **rose** and **lavender** complement immunity support ingredients especially well, creating well-rounded products that target consumer needs around immunity as well as **sleep, stress relief** and **relaxation**.

Hibiscus, traditionally brewed in tea, is on the rise as a ‘hero’ ingredient in a number of other functional food and beverage categories, including Kombucha, nutrition bars and probiotic yoghurts. **Geranium** is another floral to watch, thought to have antioxidant and antibacterial properties.

The boom in ‘infused’ waters also has big potential for florals, as illustrated by brands such as Recess and Petal.

Trend 4 – Alcohol with a functional twist

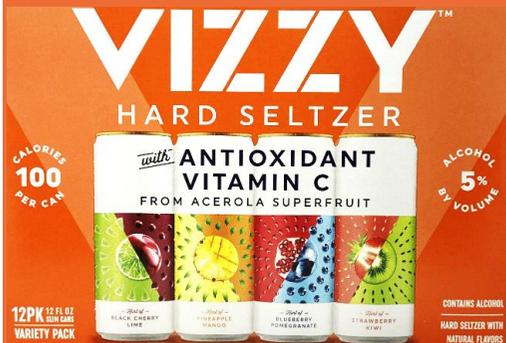
US consumer interest in immunity-boosting cocktails is up a staggering +1060% [6]



The lockdown has inspired an at-home **cocktail** making craze, with sales of cocktail ingredients and DIY cocktail kits soaring as consumers look for alternative at-home means of entertainment and **healthier indulgent** options.

“Cocktails that offer an immunity boost are especially in-demand; power up your kit offerings and marketing with a focus on immunity.” *May 2020, Tastewise*

Vizzy: Hard Seltzer Variety Pack with Antioxidant Vitamin C



Claims: with natural flavours made with **antioxidant vitamin C** from **acerola superfruit**.

Apr 2020, US [Mintel GNPD]

As consumers experiment at home, they are discovering more sophisticated, less sweet flavour profiles and looking for ways to get a health kick at the same time. **Ginger, turmeric** and **rosemary** are ‘standout stars’ for health-conscious cocktail makers.

The **hard-seltzer*** market, which saw exponential growth across the US, and is now taking off in the UK market, is also turning to ingredients with functional benefits and natural flavours to enhance health perceptions.

*(*Hard seltzer is an alcoholic low calorie, low carb, flavoured fizzy water.)*

Data Sources: [6] Tastewise Cocktail Kit Report – May 2020 | [7] Tastewise: Ingredient Spotlight, Hard Seltzer – March 2020

Trend 5 – Gut health gets indulgent

Twisted Healthy Treats: Lite Ice Cream + Probiotic Power



Claims: ...contains one billion live and **active probiotics** per tub which are said to do amazing things for inner health from **boosting immune** and **digestive systems** supporting a healthy lifestyle...**75 calories**

Mar 2020, Australia [Mintel GNPD]

Real Kombucha: Dry Dragon



Claims: ...notes of **grapefruit** and **lemon**, with the clearly detectable undertone of green tea. It contains **only 50 calories** per bottle and all the benefits of tea plus organic acids that **support a healthy gut** and active **digestion**.

Mar 2019, UK [Mintel GNPD]

Gut health remains one of the defining functional trends for 2020 and beyond, driven by growing consumer understanding of the microbiome and the gut's role in a healthy immune system.

“68% of UK adults say that actively looking after your gut health is essential to overall health.”

Mintel British Lifestyles Report 2019

As the trend goes ever more mainstream, gut health is shedding its serious, ‘health food store’ image in favour of more playful executions and **indulgent** formats, including **ice cream** and even **alcoholic drinks**.

Luxury **kombucha** brands are also leveraging the complex flavour profiles of their fermented drinks to tap the trend for non-alcoholic beverages. UK brand Real Kombucha has secured listings in high-end restaurants on the strength of its sophisticated brews, while Canada’s Silver Swallow is positioning itself around premium non-alcoholic cocktails.

[8] Mintel British Lifestyles Report: <https://www.mintel.com/press-centre/social-and-lifestyle/healthy-ethical-and-experiential-the-holy-trinity-of-british-consumer-spending>

Trend 6 – Immunity support on the go

Regrained: Honey Cinnamon Supergrain+ Immunity Bar



Claims: made with **turmeric** and Manuka **honey**, and contains 5g fibre and 160 calories. This non-GMO product also contains prebiotic fibre to **support gut health** and power the active, **healthy lifestyle**.

Jan 2020, US [Mintel GNPD]

As more consumers make immunity-boosting ingredients part of their everyday routine, expect demand for **easy, convenient** formats to increase.

With lockdown restrictions easing and people returning to work, many will be looking for an immunity-boosting hit that doesn't require lengthy at-home preparation.

Convenient formats suitable for **on-the-go** consumption will become increasingly important to keep shoppers engaged with immunity support long term.

Katjes VitaMinis: Yogurt Fruit Gummies with Vitamins & Fruit Juice



Claims: ...fruit gummies containing **six vitamins**... contribute to the normal functioning of the **immune system**.

April 2020, Germany [Mintel GNPD]

RTD products, including **vitamin-fortified** drinks and juice shots, nutrition bars and snacks that allow consumers to get a hit of functional ingredients while on the go, will be a strong area of focus. But suppliers are also increasingly experimenting with more unusual formats to deliver functional ingredients, including frozen lollies, sweets and chocolate.

Also worth watching are **meal kits** and **recipe boxes** that curate immunity-boosting dishes and ingredients. In the APAC region **meal replacements** in particular are gaining pace in new product launches with immunity claims.

[9] Mintel – Nutrition Watch: Immunity in APAC

Trend 7 – Vitamins take centre stage

Get More Vits: Multi Vits, Sparkling Lemon And Lime Drink



Claims: Supports a healthy body...Low calorie...**Multivitamins** give you your daily dose of vitamins...**B6** and **B12 support your immune system**, and **vitamin D** helps maintain healthy bones and muscles. **Vitamin fortified.** With natural flavours. *Dec 2019, UK [Innova]*

Vitamins, especially vitamin D are receiving unusually high levels of media attention as a result of the coronavirus outbreak. Some governments have widened official guidance on vitamin D supplementation in light of the lockdown.

“Consider taking 10 micrograms of vitamin D a day to keep your bones and muscles healthy.”

NHS coronavirus guidance

Interest over time

Google Trends

● vitamin d foods ● vitamin d coronavirus



Worldwide. Past 12 months. Web Search.

This led to a spike in consumer interest in foods high in vitamin D, which has remained high since. There is a well-established practice of fortifying products such as cereal, milk and milk alternatives. **Vitamin fortified** launches are also rapidly increasing in a number of other beverage sub-categories, including flavoured waters, juices, RTD, sports and energy drinks.

Manufacturers that use relevant ingredients and/or fortification have an increased opportunity to highlight the vitamin content of their products as a key benefit in the current climate.

[10] NHS guidance: <https://www.independentnurse.co.uk/news/nhs-advises-public-to-take-vitamin-d-supplement-while-in-lockdown/226468/>

Trend 8 – Homegrown functionals

“Grow your own **immunity boosting** garden at home”

Times of India, April 2020 [12]

“How to plant a **wellbeing** garden”

The Guardian, March 2020 [13]



Immune System
Elderberry +108%



Stress Relief
Rosemary +114% YoY

Elderberry is up +108% in consumer conversations at home about "**immune system**".

Rosemary is up 114% YoY for "**stress relief**".

[1] Tastewise: Food for immunity?

Food for thought during coronavirus, March 2020

The lockdown has inspired thousands of people to grow herbs, vegetables and fruit in their gardens and on windowsills.

“**42%** of Brits turned to **gardening** to cope with lockdown restrictions.”

Office for National Statistics, April 2020 [11]

Seed companies have reported record demand for tomatoes, rocket and lettuce seeds, while search trends data suggests booming interest in **basil**, **rosemary**, **parsley** and **thyme**.

Green and red chilli peppers, which are associated with immunity support thanks to their high vitamin A and C content, as well as **lavender** and **peppermint** also feature regularly in advice columns for budding gardeners.

Increased interest in plants with functional properties could create a ‘halo’ effect far beyond gardening: consumers that grow and cook functional ingredients are more likely to recognise and look out for them when **choosing packaged foods and drinks**, too.

Trend 9 – Functional ingredients with an ethical edge



The pandemic is changing consumers' relationship with food, with interest in local and **ethical sourcing** on the rise.

Younger demographics (Gen Z and millennials) are especially interested in responsible and ethical brand choices, research by PwC suggests.

“Consumers indicate they will shop more **ethically in the future.”**

PwC Consumer Sentiment Survey, May 2020

Provenance and **traceability** have also become more of a focus in the wake of COVID-19, as consumers seek assurance about the quality and safety of ingredients in the products they buy.

As sourcing credentials become more important in general, products and **trusted ingredients** are likely to become more sort. Suppliers that demonstrate an edge (organic, upcycled, ethically sourced ingredients and food waste prevention initiatives), as well as provenance and traceability, are set to benefit.

[14] PwC Consumer Sentiment Survey, May 2020: <https://www.pwc.co.uk/issues/crisis-and-resilience/covid-19/consumer-sentiment-tracker-may.html>

Trend 10 – Adaptogenic everything

Recess: Pom Hibiscus Sparkling Water



Claims: sparkling water infused with hemp extract and **adaptogens**...American ginseng, is claimed to **improve memory** and **help to focus**; L-theanine, is claimed to **reduce stress**; schisandra is said to **boost immunity**, promote balance.

March 2019, US [Mintel GNPD]

Pop & Bottle: Golden Turmeric Almond Latte



Claims: warming blend of **adaptogenic turmeric**, spices, pure almond milk and a hint of dates...made with adaptogenic turmeric & cleansing ginger. Plant-powered – dairy-free, no lactose, no cholesterol...no refined sugar...no preservatives.

Feb 2020, US [Mintel GNPD]

‘**Adaptogen**’ is becoming an important **wellness** buzzword for millennials and Gen Z consumers.

Adaptogens are a select group of herbs (and some mushrooms) that support the body’s natural ability to deal with stress. They are called adaptogens because of their believed ability to **“adapt”** their function according to the specific needs of the body.

Adaptogens have been on beverage makers’ radar for some time, but we’re now starting to see more brands use the term explicitly in their branding and marketing. This is partly driven by **celebrity endorsements** of ‘adaptogenic’ products, which have driven consumer understanding of the term.

Tea and coffee are important areas of focus for adaptogenic NPD, but the ‘ingestible beauty’ trend is opening up new opportunities for other beverage sub-categories, including RTD drinks, sparkling and flavoured waters.

Interest in **turmeric** – already a functional superstar – is set to be boosted even further by this trend. Other ingredients that are well positioned to tap the ‘adaptogenic’ boom include **hibiscus**, **goji berries** and **holy basil**.

Trend watch – ingredient combinations and pairings

Traditional combinations and new concepts to watch out for:

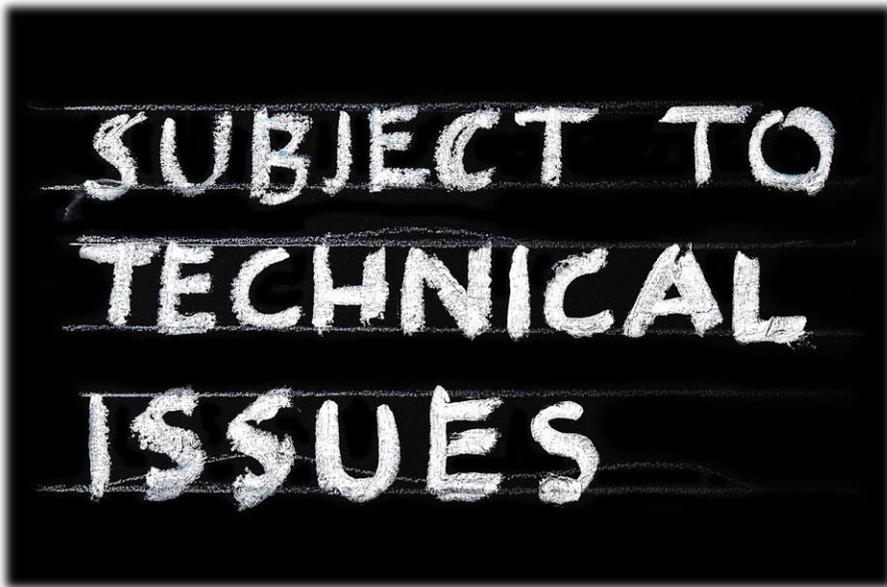
- Elderberry & Hibiscus
- Jasmine & Mandarin
- Lemon & Lavender
- Cardamom & Rose
- Elderberry & Strawberry
- Elderberry & Honey
- Honey & Lemon
- Lemon & Rosemary
- Goji Berry & Ginger
- Yuzu, Ginger & Turmeric
- Clementine, Ginger & Turmeric
- Cinnamon & Ginger
- Cinnamon & Coconut
- Blueberry & Cinnamon
- Blueberry & Honey
- Blueberry & Cranberry
- Orange & Cranberry
- Orange & Cinnamon
- Garlic & Rosemary
- Fig, Rosemary & Black Pepper
- Black Pepper & Turmeric
- Watermelon & Kiwi

To summarise, in addition to the traditional ingredients associated with immune support, such as **ginger** and **turmeric**, watch out for new combinations incorporating **florals** and **berries**. These don't just create excitement and a point of difference for immune-support foods and beverages, but also add **multifunctional** dimensions, including through calming, relaxation and sleep aid properties.

In line with shifting consumer demands, expect to also see more products **fortified** with **vitamins**, **minerals** and **adaptogens** as well as accelerated growth in the 'healthier' **indulgence** trend.



The 'technical bit' - regulations around health claims



Many countries have strict regulations to ensure consumers aren't misled with false or unsubstantiated claims on foods and beverages around being 'healthy'.

In Europe, you can only make the claim “X contributes to the normal function of the **immune system**” for Copper, Iron, Selenium, Zinc, Folate, Vitamins A, B12, B6, C and D and only where the content in these foods, or a serving is **at least 15%** of the recommended daily intake; or **7.5% per 100ml** of beverages.

Rules for nutrition and health claims in Europe have been established by Regulation (EC) No 1924/2006.

Always check labelling regulations relevant to the country where the product will be marketed and sold.

[15] European Commission Nutrition & Health Claims: https://ec.europa.eu/food/safety/labelling_nutrition/claims_en

Quality ingredients sourced with integrity



With consumers increasingly looking for ethical and zero-waste credentials, it's good to know there's a great sourcing story behind Lionel Hitchen's high-quality ingredients.

Did you know that **misshapen** and **'wonky'** fruit are routinely used in the making of our citrus ingredients?

The 'perfect' fruit are selected for the fresh produce industry, but our citrus oils are a **by-product** of the citrus juice industry.

The oil we use is collected from the peels, which are discarded after the juicing process. Extracting oils from peels ensures we don't impact crops used for feed or fuel.

And the story doesn't end there. After the oils have been collected, the peels can be dried and made into water-soluble peel extract.

We select only the **best raw materials** to go into our ingredients – to add great taste to health foods and beverages.

How we can support your innovation plans

 Citrus Specialities	Capturing the authentic aroma and flavour of the world's finest citrus oils.
 Herb & Spice Extracts	Choose from our extensive portfolio of natural herb and spice extracts.
 Flavourings	Naturally fabulous flavours created with unique, in-house manufactured ingredients
 Creative Solutions	Turning ideas into commercial success for your business.

All of our products are suitable for vegetarians and vegans.

We operate a strict policy to exclude nuts and sesame seeds from our facilities to give our customers assurance regarding allergen controls.

Lionel Hitchen is an independent, family owned manufacturer and supplier of ingredients and flavours to the food and beverage industry.

From our manufacturing base in the UK, we supply our products all around the world. Since the business was founded, we have established a reputation for the high specification of our products, our flexibility, technical expertise and the creation of tailored and bespoke products to meet your needs.

Our product portfolio includes a diverse range of citrus oils, botanical extracts and natural flavours, including florals and berries, to add great taste to your health foods and beverages.

If you're looking for complementary natural flavours and botanical extracts for your NPD projects please contact Tim Brown, Sales and Marketing Director, to discuss your requirements and request samples:

contact@lionelhitchen.com

Follow us:



Lionel Hitchen Ltd manufactures and supplies complementary natural flavours and botanical extracts, to add great taste to health foods and beverages.



Naturally Fabulous Flavour Ingredients

Data Sources

- [1] Tastewise: Food for immunity? Food for Thought During Coronavirus – March 2020
 - [2] Innova Immunity Boosters: Trends Overview – 2020
 - [3] Bloomberg: <https://www.bloomberg.com/news/articles/2020-05-18/orange-juice-prices-soar-with-americans-seeking-immunity-boost?sref=Hhue1scO>
 - [4] Innova: Functional Beverages Tap into Consumer Demands for Convenience, Sleep Support and Immune Health – May 2020
 - [5] Mintel – Patent Watch: Boosting Immune Health a Future Focus – April 2020
 - [6] Tastewise: Cocktail Kit Report – May 2020
 - [7] Tastewise: Ingredient Spotlight, Hard Seltzer – March 2020
 - [8] Mintel British Lifestyles Report 2019: <https://www.mintel.com/press-centre/social-and-lifestyle/healthy-ethical-and-experiential-the-holy-trinity-of-british-consumer-spending>
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 - [14] PwC survey: <https://www.pwc.co.uk/issues/crisis-and-resilience/covid-19/consumer-sentiment-tracker-may.html>
 - [15] European Commission Nutrition & Health Claims: https://ec.europa.eu/food/safety/labelling_nutrition/claims_en
- Innova Database & Mintel GNPD (Global New Products Database)