



'Natural'

What does it mean to consumers?

April 2018

Spain

The 'Natural' trend

Consumers are more conscious than ever about the safety and trustworthiness of food and drink, which has led to an increase in the use of natural, as well as ethical and environmental claims in food and drink innovation.

In the Mintel Global New Product database, natural product claims (which include no additives, preservatives, organic and GMO free) appear in 29% of global food and drink launches (Sep 2016-Aug 2017). This is an increase from 17% from the claims we saw between September 2006 – Aug 2007.

Food and Drink manufacturers are having to become more open about their ingredients, production processes, and supply chains.

Ultimately, this helps consumers feel more confident about the safety and purity of the food and drink that they purchase



Kale-O's Sweet Chilli and Mint Kale crisps are organic green kale leaves with fresh mint, cayenne chilli and olive oil dressing. It is free from gluten, nuts, trans fats and is organic. The packet is also compostable

Source: Mintel Global Food and Drink Trends 2018

What does the word 'natural' mean to consumers?

We asked consumers across 28 countries what the term 'natural' meant to them if communicated on food or drink packaging.

Most commonly associated attributes

	Global	Spain
1	Without artificial ingredients 52%	Without artificial ingredients 49%
2	100% from nature 44%	100% from nature 43%
3	Healthy 43%	Healthy 41%

Least commonly associated attributes

	Global	Spain
1	Not mass produced 6%	Not mass produced 4%
2	Ethically produced 9%	Ethically produced 5%
3	Locally sourced 10%	Locally sourced 6%

Source: Ipsos MORI Global Advisor Survey. N=14002 28 countries

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There are more consistencies than differences across the 28 markets

'Without artificial ingredients' is the most common attribute associated across the markets (the most common association in **18 of the 28** markets)

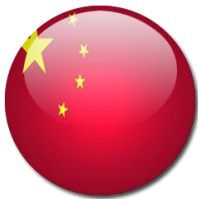
Some market differences



In Germany 'Sustainably produced' is the 4th most common association (**23%**) – this is **higher** than all other markets.



In Saudi Arabia and Hungary, 'Allergen Free' is the 4th most common association (**16%** and **13%**). 7 other markets have 13% of the population or more associating natural with 'Allergen Free'. It is most common in Peru (**19%**)



In China and Serbia, 'Ethically produced' is the 5th most common association (**19%** and **12%**) – For China, this is **higher** than all other markets. 4 other markets in addition to China and Serbia have 12% of the population or more associating natural with 'Ethically produced'.

There are some regional variations in the association of the term 'natural'

North America is significantly more likely to associate natural with 'without artificial ingredients' (57%) and 'unprocessed' (41%)

The region is less likely to associate natural with allergen free (6%)

LATAM is significantly more likely to associate natural with 'healthy' (59%), and less likely to associate natural with 'mass produced' (4%)

Europe is significantly less likely to associate 'natural with 'organic' (21%)

APAC is significantly more likely to associate natural with 'authentic' (23%)

Source: Ipsos MORI Global Advisor Survey. N=14002 28 countries

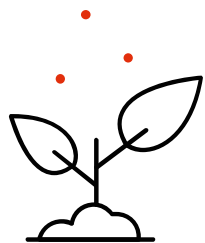
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Whilst younger age groups associate 'natural' more with organic, older age groups focus on the ingredients

(Significantly more likely to associate 'natural' with... (vs. 35-64))

Under
35 y.o.



Organic (34%)

Locally sourced (11%)

Ethically produced (10%)

(Significantly more likely to associate 'natural' with... (vs. under 35 and 35-49))

50-64
y.o.



Without artificial
ingredients (57%)

Unprocessed (27%)

Source: Ipsos MORI Global Advisor Survey. N=14002 28 countries

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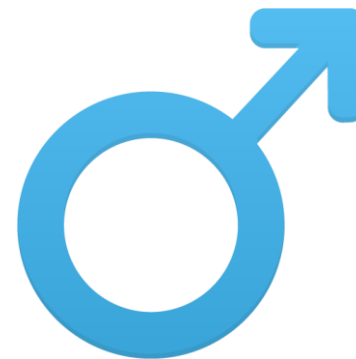
Females are significantly more likely to focus on the ingredients vs. males. Males are significantly more likely to associate natural with authentic

(Significantly more likely to associate 'natural' with... (vs. males))



Without artificial ingredients (54%)
Healthy (44%)
Unprocessed (28%)

(Significantly more likely to associate 'natural' with... (vs. females))



Authentic (19%)

Source: Ipsos MORI Global Advisor Survey. N=14002 28 countries

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In Spain, we see few significant differences across age gender



*Significantly more likely to associate
'natural' with... (vs. Male)*

Without artificial ingredients (57%)



Source: Ipsos MORI Global Advisor Survey. N=14002 28 countries

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Thank you

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