FUTURE FOOD TRENDS

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Abstract
This article reviews the literature on the future food trends with the aim to analyze the consumer changes and the way they impact the food markets. The consumer changes of the past two – three decades have influenced the new product development process (NPD) of food companies. Also these changes will continue to impact the new type of products that are going to be launched in the next ten years. The changes that have occurred in the consumers attitudes regarding food choice are a result of the influence of multiple factors. To understand the key factors influencing on consumers food choice is necessary to look at the macro environment of today's society and its influence on consumer's lifestyle. Some of the consumer changes that are going to be discussed in this article are: 1) demographical changes (income level, age, educational level, and house hold size); 2) urbanization; 3) life style and value changes (influenced by multiple factors, such as globalization, trade liberalisation, and increased income level, etc.). From the analysis on the consumer changes that impact the food choice, the authors deducts that the main food trends that will influence the NPD process of food companies in the next ten years are: a) health and wellness trend; b) convenience trend; c) pleasure and indulgence trend and d) value and quality trend. Aside these four mega trends, the analysis will reveal also other smaller trends, which included cosmetic food and beverage, free-from, simplicity, and variety seeking trend.

Key Words: food choice, consumer changes, consumers' attitudes, functional foods, convenience trend

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INTRODUCTION

During the past two decades, there have been many changes in the consumers' attitudes toward the food choice. These changes have an impact not only on the consumer part (regarding the food they consume) but also on the manufacturer of these foods (regarding the foods they produce), since the foods that used to be consumed 20 years ago now don't exist or are consumed by fewer consumers. Now days market orientation is needed more than ever for the food manufacturer because these changes have shaped a more heterogynous population in terms of needs. The world population of 2013 is much more segmented (heterogynous) than the world population of 2000 or 1990s (especially in the developed countries). In order to understand the complex needs of today consumers and be competitive in the market place, market orientation of the food companies should be at the heart of their strategy and NPD process.

1 CONSUMER CHANGES THAT IMPACT FOOD CHOICE

Consumer attitude toward food choice have change immensely during the last two decades. These changes are a result of multiple factors, such as increased income level of consumers, increased product availability, technological changes, etc. In this section some of the consumer changes that are going to be discussed include demographical changes, urbanisation, life style and value changes.

1.1 Demographical changes

In the field of consumer research the demographic variables are an accepted construct of the food choice model (Bell, 2007). Some of the components of the demographical variables that have change during these past decades include income level, age, household size, and educational level. Alongside with the demographical changes, we have the consumer changes in their food choice. The question that the authors raise in this section is how the demographical changes affect the food markets?

1.1.1 Income level

The income level is one of the basic determinates of food choice. According to the economics theory with the increase of income level, the percentage of disposal income allocated to food by the consumer is reduced. This does not mean that the amount of food consumed is reduced. Consumers cannot increase the amount consumed at the same level as their increased income because they have a limit level of food consumption per day. This is the main reason for market saturation especially in the developed countries. The economics law stays more for staple food or generic foods with the increase of the income level the demand for these foods is reduced. Higher quality products and built-in service products have replace the reduced demand for the generic foods.

The changes of income level in these last decades have made the consumers to require higher quality product with specific attributes. Except this, eating out of home pattern has increased as well. Datamonitor (2010) report that the global food-service industry is expected to have a strong growth in the coming period, by 2015 is projected to reach USD 2.2 trillion in revenues. The main reason behind this is the growing food market outside home (Datamonitor, 2010). Another explanation to the changes in the food choice of the consumers has to do with the production part. The only way for food companies to survive in 2013 competitive and saturated market is to create higher quality product with added benefits that can attract the consumers.

1.1.2 Age

According to Meulenberg and Viaene (2005) the population older than 65 years old (or the "greying" population as they refer to it) in the EU is expected to increase to 21% by 2020. The over 65 year's population is expected to grow especially in the developed world. What are the implications of this change in the food markets? There are significant differences between elderly consumers compared to the other part of the population in terms of sensory aspect to food, with ageing the sensory aspects decrease. Hence, it is required of food companies to produce products targeted at this segment with enhanced sensory attributes. Another issue that comes along with aging is health related diseases like cardiovascular diseases, osteoporosis, and diabetes (Bleiel, 2010). By being more likely to encounter these diseases, elderly consumer should be more health oriented in their food choice (Herne, 1995). This segment offers big opportunities to food manufacturer since it's going to have a considerable growth. However, as Bleiel (2010) argues targeting this segment will be a big challenge for the food industry since people do not want to be addressed as old.

1.1.3 Household size and Educational level

During the past decades there has been a decrease in the household size. The average household size in the US is around 2.5 individuals, while in 1990s it was around 3.5 individuals (Bell, 2007). According to Meulenberg and Viaene (2005) the trend toward smaller families, with both of the partners working have stimulated the demand for convenience food and the consumption out of home. Regarding the educational level, the consumers of 2013 are better educated than they used to be. As a result, the consumers are better equipped in understanding the information provided by the advert or the information contained in the product label (Bell, 2007). According to Nayga *et al.* (1998) consumers with college education, a bachelor degree, or graduates are more likely to use nutrition labels than individuals with no college education. This leads to the logical assumption that there is a correlation between the consumer educational level and quality of food purchased. Popikn (1999) concludes in his study that in the urban areas of Brazil the more educated consumers are less likely to be over weight than the less educated. Being better educated makes consumers to be more discerning in terms of the product they eat.

1.1.4 Urbanisation

According to Hines (2008), the urbanisation rate of the developed countries is above 75% and in the developing world; the urbanisation process is increasing rapidly. The effect of the urbanisation process in consumer's life is that the level of activities that they used to do (i.e. working in agriculture) is replaced by jobs with less physical activities (i.e. office work). Another effect of urbanisation is the reduction of leisure time, which leads consumers to changes in their consumption patterns (Popkin, 1999). Popkin (1999) highlight that this consumption patterns are more toward convenience food, which in turn are highly processed food and very high in sugar and fat compared to traditional meal. The results of this type of diet combine with the reduced level of physical activity leads to increased levels of health diseases such as obesity, diabetes, cardiovascular disease, etc. (Kearney, 2010)

The implication of this change to the food markets is the growth of eating out of home market and increased awareness of healthy eating. According to Datamonitor (2010) the spending on food away from home is expected to increase by 10% per capita by 2025.

1.1.5 Changes in life style and values

Meulenberg and Viaene (2005, p25) define values as "... *the mental representation of important life goals that consumers are trying to achieve*." Values such as self-fulfillment, better quality of life, and work to live are increasing in importance to consumers (Plummer, as quoted by Meulenberg and Viaene, 2005, p26). According to Meulenberg and Viaene (2005) the increased importance level of these values impact consumer food choice. As a result, consumers (especially in the developed world) are becoming more and more environmentally concern when they choose their foods (Reusswig *et al. 2003,* Meulenberg and Viaene, 2005). According to Tranter *et al.* (2009) consumers are willing to pay more for organic food since they are perceived to be environmental friendly and healthier. This trend toward more natural foods is increasing and will continue to increase in the future because of the increased public awareness of environmental problems (such as climate change, reduced bio diversity, etc.). Furthermore, there are incentives by governments to convert to organic farming. The EU with its CAP (common agriculture policies) reforms, which came into effect in 2005, has increased the agri-environmental payments and assistance to organic farming (Tranter *et al*., 2009). Aside government intervention, there is also an increase interest of the private sector to reduce the environmental impact of their production systems. One of the main reasons behind this is the increased importance level of values such as environmental sustainability to consumer's food choice.

Life style changes are another factor that influences food choice. Life style is defined as "*patterns in which people live and spend time and money"* (Engel *et al*. as quoted by Meulenberg and Viaene, 2005, p26). Life styles are related to consumption patterns, the changes in life styles are reflected to the food choice. For example, in developing countries there is a shift in their lifestyle because of rapid urbanisation and globalisation. As a result, they are adopting more of the life style of developed countries characterised by extended working hours, smaller hose hold size, consumerism, etc. Aside urbanisation and globalisation, life style changes are impacted also by trade liberalisation. The latter enables greater availability and affordability of food, especially those that are calorie-rich, high saturated in fats & sugar and nutrient-poor (Thow and Hawkes, 2009). Kearney (2010), argues that the traditional diet featuring vegetables and grains are being replaced by meals high in fat and sugar. The result of this shift is the rapid increase in the disease such as obesity, cardiovascular diseases, cancer, and diabetes in developing countries (Popkin, 1999). Bleile (2010) highlights in his paper that obesity and overweight are the biggest health concerns of now day's society, with more than 1 billion obese people in the world. Furthermore, Bleile (2010) is congruent with Popkin (1999) by pointing out the alarming fact that developing countries are having the highest increase in obese and overweight peoples, due to the fact of changing life styles[1].

2 THE FUTURE FOOD TRENDS

In this section are outlined the key trends that will influence the new type of product that are going to be developed by food companies. These trends are a result of the changes discussed in the previous section. From the discussion in the above section, the authors deducts that the main trends that will influence the NPD process of food companies in the next ten years are:

- Health – as a motive to purchase food, being healthy, proactive measure for later life.
- Convenience – time saving, easy to prepare and clean up.
- Natural and Organic foods – increased importance level of the consumers of environmental sustainability values
- Pleasure – Premium quality foods, fun, enjoyment.

  Aside these trends in this section, the authors will discuss other trends[2] that did not come out from the discussion of the first section.

2.1 Health and wellness trend

From the discussion so far the consumer changes that have occurred in the previous decades have resulted into changes in consumption patterns. The increased income level and rapid urbanisation combined with the busy life style of consumers have led to increase consumption of fast foods. These foods usually are unhealthy, high in fats and sugar, high in calories and poor nutrients. As a result, there have been rapid expansions of health disease related to poor diets, such as obesity and diabetes. However, consumers around the world are becoming increasingly aware of eating healthy and its impact on their health status (Vaidya and Mogelonsky, 2007; Kearney, 2010). Bogue and Yu (2009) showed in their results that, the participants in their study were aware of the relationship between health and diet. Kerney (2010) is congruent with Bogue and Yu (2009) by pointing out that consumers are aware about the strong link between diet and their health. It should be noted that while ten to fifteen years ago consumers related eating healthy with the avoidance of disease; now days, the emphasis is placed on health as 'wellness', eating healthy as part of a daily life style (Vaidya and Mogelonsky, (2007). Schaafsma and Kok (2005) indicate that most of the top managers of the food companies and retail expect a strong and further growth of the health food trend.

Another factor that suggests the further expansion of this trend is the aging population, with the segment of over 65 years increasing. It is well known that with age the probability of health problems increase. According to Euromonitor (2011) by 2020 one in five people in Europe will be over 65, moreover, in Europe this market segment is expected to be EUR 10 billion worth. These figures suggest that in the next ten years the number of products with health benefits and increased sensory aspects targeted at the elderly will increase.

2.1.1 Functional foods trend

Functional foods are commonly described as products that promise a health-related benefit. In Europe, there is no approved definition of functional foods. However, the most used definition about functional foods is: "*functional foods are 'satisfactory demonstrated to affect beneficially one or more target functions in the body, beyond adequate nutritional effects in a way that is relevant to an improve state of health and well-being and/or reduction of risk diseases*" (Diplock *et al.* as quoted by Lähteenmäki *et al*., 2007, p.412). From this definition two important categories of

[1] Life style changes is a result of other factors such as increased income level, food availability, urbanization, globalisation, trade liberalisation etc.

[2] It should be noted that some of the trends overlap with each other. For example the natural foods trend with the health trend. Consuming natural foods (e.g. organic foods) have benefits for health but these foods are also bought from the consumers for their environmental sustainability.

functional foods emerge, 1 improve state of health (i.e. Activia with its claim that improves the digestive system), 2 reduction of risk diseases (i.e. Actimel increases immunity reduce the chances to get cold and flu). According to Lähteenmäki *et al* (2007) the functional foods market is a fast growing market in Europe, USA and Japan and is predicted to continue to grow in the future.

Considering the 2013 society (developed countries) with busier lifestyles, increased inters in convenience and health, rapid growth of nutritional diseases and aging population, it suggests that the development of functional foods will continue to grow in the future (Kearney, 2010; Bleiel, 2010). Another factor that reinforces the growth of this trend is the increased educational level of consumer, which helps them to better understand the benefits of the functional foods. However, for being successful in the functional foods market is increasingly dependent on four success factors: 1) finding the unsatisfied needs and target group; 2) simple ingredients, understandable by the consumers; 3) understandable benefits; 4) trust in the brand (Frewer *et al*., 2003; Bleiel 2010).

2.1.2 Natural/Organic food trend

In the last five to ten years, there has been an increase in the demand for organic foods. According to Risto and Oughton (2007), the worldwide value of organic market in 2003 was USD 25 billion, of this Western Europe accounts for 51% and US for 45%. The factors that have influenced to the growth of this trend are the increased public awareness of the environmental sustainability issues in production and the increased importance of consumers' ethics values. Furthermore, organic foods are often said to being healthier than conventional food. According to Kerney (2010) organic production places a strong emphasises on environmental protection. Walley *et al.* (2009) found that the main motives of the European consumers for choosing organics were 'it is healthier' (48%) and 'better for the environment' (16%).

Risto and Oughton (2007) argue that the growth of this trend is not entirely a result of increased demand, it is also apart supply led. Their argument is that the government incentives to increase the surface of land with organic production have led to a growth in supply. Considering the economics theory, an increase in supply leads to price decreases. Consequently, when price decreases demand for that product rises. Aside this fact, organic foods have become more available with the increased levels of production.

There are researchers who argue that the organic food trend will not have a long life. Tilman *et al.* (2002) argues that since organic food production is not an efficient production method in terms of quantity; it is unlikely that organic production will meet the increased global food demand by 2050, since is expected that the world population by that time would be 9 billion. However, in the authors' opinion the organic food trend will continue to grow in the future, we will see not only an increase in the organic agricultural food products (i.e. fruits, vegetables) but also an increase of processed foods that are produced from organic raw materials. The reasons why this trend will continue to grow in the future are:

- In the developed countries, markets have achieved a level of saturation, as a result, food producers need to differentiate and add value to their products in order to survive in the market place. One way to do that will be organic production.
- The number of ethical and environmental friendly consumers will continue to grow with the increased environmental problems such as global warming.
- The growth of world population by 2050 is expected to happen in the developing countries, the developed countries will have an increase in the elderly population, which are more threatened from health diseases and organic food will be to them a healthier option compared to conventional food.
- The problem of feeding the world with organics is not a production problem in terms of quantity produced but is more of

a problem of food distribution in the world.

- Lastly, organic foods are not meant to feed the world, it is more of a niche market focused in developed countries. As it can be seen from the figures shown above in 2003, 96% of the organic market was allocated in the developed countries.

2.2 Convenience trend

The word convenience is a very complex term to segment a population and to determine if the consumers seeking convenience is increasing or not. Convenience in itself is composed by many different attributes that in the end can be generalised with one word 'convenience'. Therefore, before continuing the discussion of convenience trend is necessary to define convenience as a motive that leads to food choice. According to Darian and Cohen (1995), convenience can be categorised along two dimensions:

- The effort that is being reduced – such as saving of time, saving of physical energy, or saving of mental energy.
- The phase in which the saving occur in the home food production chain – planning what to eat, purchasing, preparation, consumption, and cleaning up.

The demand for convenience food is a lifestyle issue, in developed countries the changes in lifestyle has led to increase demand for these types of foods (Bucley *et al.*, 2007). According to Research and Markets (2008) the convenience foods and drinks market in 2008 was worth USD 158 billion in Asia-Pacific; 40% of the convenient products launched featured related to speed of preparation, 30% featured single servings, and 15% featured fresh convenience. The number of dinners prepared from scratched is declining very fast (Research and Markets, 2008).

Considering the consumer changes discussed in the first section of this paper, declining average house hold size, aging population, busy life styles, etc. – suggest that in the future the convenience trend will continue to grow. According to Buckley *et al.* (2007) the implication of the decline in the household size with convenience foods, include increase demand for single servings and smaller portion sizes, for ready meals and eating out of home. Furthermore, the part of population that in 2013 is at middle age and is currently consuming ready meals, takeaways and eating out of home because of busy life styles, will demand more convenience foods than the actual generation of over 60 years (Bruner *et al.*, 2010; Buckley *et al.*, 2007).

2.3 Pleasure and indulgence trend

According to Luomala *et al.* (2004), food is one of the most fundamental sources of hedonic experiences in human life. Even though there is an increased awareness of healthy eating, consumers will always permit their self to indulge in delicious premium quality foods from time to time. Except the motive of enjoyment of food, another factor that suggests the continuity of the pleasure and indulgence trend is mood. Mood experience is negatively related [3] to the consumption of indulgence food, (Luomala and Laaksonen, 1999). Huges (2009) highlights that the pleasure and indulgence trend will continue also in the future. He states that the attributes that indulgence and pleasure foods should have include greater taste, premium product, premium price, and high quality. It can be argued that with the economic recession, this product category should have a decrease in sales, but in reality it is happening the opposite. Stone (2010) points out that the sales of chocolate products in the US are having a sharp increase, by 2014 is expected that sales will exceed USD 19 billion and the average growth rate is predicted to be 3%. This is a clear example of the continuity of this trend in the future.

2.4 Value and quality trend

The society of 2013 does not pay the same attention to nutrition as they did in 1990s and the reasons for this were discussed in the first

[3] Bad mood leads to increase consumption of indulgence food

section of this paper. Today's consumers are more interested in high quality products with added benefits that suit their lifestyles. According to Bleile (2010), they are demanding increased variety and high quality at reasonable prices. Consumers in 2011 are more price conscious then they used to be before the economic recession. Flatters and Willmott (2009) highlight that in the last three year's consumers are becoming increasingly thrifty. This can be explained by the increased consumers level of uncertainty for the future, the boost in the market share of the retailers own label products, and the raise in the discounters sales. By considering this trend, some food companies are trying to achieve a balance between product quality and price. Kerry group in one of its reports has targeted this trend in the development of its new future products (McCarthy, 2010). This trend suggests that the own label product will continue to gain market share. If food companies do not find the right mix and do not differentiate their products to make their brands stand out, they will suffer the strengthening of the retailers own label products (Gehlhar *et al.*, 2009).

2.5 Other food trends

Apart from the trends discussed so far, there are also other smaller emerging trends that will influence the NPD process of food companies in the next ten years. These trends are:

- Cosmetic food/beverages trend
- Free-from trend
- Simplicity trend
- Variety seeking trend

The cosmetic trend is part of the health and wellness mega trend. From the developments in the market, it can be deducted that in the future we will see more types of this category of products. The market of cosmetic foods in 2007 was worth EUR 1.2 billion and by 2012 is expected to be EUR 2.5 billion; the average growth rate per annum of this market is 15-20% (Euromonitor 2011). Some of the drivers of this trend are increased consumers awareness of health, aging population, growth in the income level, etc. An example of cosmetic foods launched recently in the market is 'Lumaé'. This product is a skin enhancing beverage tea-base ready to drink launched by Coca-Cola an L'Oreal.

The free-from trend is as well part of health and wellness mega trend. The drivers that suggest that food companies are going to launch more type of these products in the next ten years are:

- Health as a motive to buy free-from products, this product are perceived to be more healthy
- Higher profits for food companies because these products have high added value
- The global market in 2010 was worth USD 1.7 billion with a growth rate of 25% per year; by 2015 is excepted that the global market will be USD 4.3 billion (Euromonitor, 2011)
- Free-from as a means for food companies to differentiate their products in the saturated markets.

According to Flatters and Willmott (2009), downturns are stressful and usually this leads consumers to an increase desire for simplicity. Before the recession consumers were feeling overwhelmed by the increasingly options of food choice and were starting to demand more simplicity. Flatters and Willmott (2009) highlights that this trend will continue to grow also after the recession, consumers will buy simple offerings with the greatest value. Lastly, variety seeking is another emerging trend in the food markets. The main driver of this trend is the consumers' desire to taste and experience new type of foods. A clear example of this new trend is the EL Bulli restaurant in Spain. Carpenter and Doyle (2009) describe EL Bulli as "*a Meca for foodies*", every year EL Bulli receives millions of requests from all the around world, for just 8000 places. The high demand of request to seat in EL Bulli is a sign of the consumers desire to taste and experience new high quality foods and as well suggest a trend for the future food markets.

CONCLUSIONS

The consumer changes that have occurred during the past two – three decades have influenced the NPD process of food companies. These changes will continue to impact the new type of products that are going to be launched in the next ten years. Some of the consumer changes that were discussed in this paper were:

- Demographical changes (income level, age, educational level, and house hold size)
- Urbanisation
- Life style and value changes (influenced by multiple factors, such as globalization, trade liberalisation, increased income level, etc.)

From these changes new food trends have emerged. The analysis in this paper identified four mega trends:

- Health and wellness trend
- Convenience trend
- Pleasure and indulgence trend
- Value and quality trend

Aside the mega trends, the analysis revealed also other smaller trends, which included cosmetic food and beverage, free-from, simplicity, and variety seeking trend. By looking at the expected evolution of the consumer changes in the next ten years, it can be deducted that these trends will continue to grow and influence the NPD process of food companies.

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