



Food Processing
InPerspective™
by Cargill Salt



Grab, Go, Indulge: The New Breakfast Breads

Bread rises in breakfast category as consumers demand more convenient, portable, and wholesome options.

Move over low-carb diets—on-the-go breakfast breads, pastries, and breakfast sandwiches are here to stay for busy American families looking for quick breakfast options. Today's consumers are looking for convenient, nutrition-packed, portable options that still meet their desire to indulge.

The breakfast foods category is expected to grow by nearly 26% from 2012 to 2017, according to Mintel. Sixty-two percent of consumers say they would prefer products that are high in fiber, low in sugar, or low in sodium. Moreover, the top attributes consumers seek in breakfast foods are low in cholesterol, high in protein, low in fat, high in fiber, and whole grain.

Despite their focus on nutrition, consumers aren't afraid to indulge—perhaps just on a smaller scale. Mini muffins, muffin tops, mini doughnuts, and mini coffeecakes are examples of offerings that encourage portion control without compromising taste. One example of a company aiming to satisfy consumer desires is Sara Lee® who offers Wholesome Indulgence® Mini Muffins that are made with whole grains for its foodservice segment.

To take advantage of the trend, Vitalicious®, which makes VitaMuffins® and VitaTops® Muffins, is trying to strike a balance between nutrition and indulgence, with flavors such as Deep Chocolate, Banana Choco Chip, Dark Chocolate Pomegranate, and Carrot Cake—all of which have reduced calories and fat while being high in fiber and protein.

Frozen waffles, breakfast pastries, packaged doughnuts, and toaster pastries are among the top weekday breakfast bread types consumers choose at home for a quick, convenient

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breakfast. Consumption of these same items declines over the weekends, when consumers are not as pressed for time.

Breakfast sandwiches are the top breakfast option for consumers eating away from home, with nearly half of consumers (49%) indicating they eat them at least once every 90 days, according to Technomic. Twenty-seven percent of consumers eat breakfast burritos or breakfast wraps at least once every 90 days, as well.

Biscuits and bagels hold the lion's share of the most popular bread types used on breakfast sandwiches, but new bread types such as paninis, ciabatta, flatbread, tortillas, and multigrain bread are beginning to emerge.

"Just as there has been innovation in sandwich breads overall...there has been innovation in breakfast sandwich breads," says Mary Chapman, director of product innovation at Technomic. "[B]rands tend to focus on breads that will hold a sandwich together if eaten with one hand [or] in the car."

For example, Jimmy Dean® launched its frozen Jimmy Dean Delights® line of flatbread breakfast sandwiches last year at under 300 calories each. Vitalicious® also offers two egg and cheese varieties of its VitaSandwich® sandwiches on whole grain English muffins at only 150 calories each.

Indeed, food manufacturers have room to innovate in the breakfast bread segment. However, consumers have laid out a challenging bill to fill—options that are convenient, portable, and wholesome without sacrificing taste.

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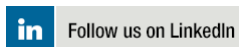
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Consumers Seek Nutrient-Rich Foods

From potassium to iron, consumers are looking for more nutrients in the foods they buy.

Consumers are increasingly interested in making what they believe to be healthful choices regarding their diet and are beginning to pay attention to nutrients in their foods and beverages. According to an International Food Information Council (IFIC) 2014 Food and Health Survey seventy-one percent of consumers state that “healthfulness” influences their food choices, a 15 percent jump from 2010. Furthermore, nearly nine out of ten consumers have given some thought to food and beverage ingredients, and two out of five have given a lot of thought to ingredients in the past year, according to the IFIC survey.

Specifically, foods and beverages rich in vitamins, minerals, protein, whole grains, omega-3 fatty acids, probiotics, and other nutrients are catching the eyes of consumers. Polyphenols, which are antioxidants found in spices such as cloves, peppermint, and star anise as well as other herbs and foods, also seem to be sought-after nutrients.

According to IFIC, 77 percent of Americans believe that packaged foods can include nutrients needed for good health. Processed foods, such as frozen fruits and vegetables, yogurt, canned beans, granola bars, cereal, and frozen meals, can provide important nutrients such as iron, folate, fiber, potassium, calcium, vitamin B12, vitamin D and others.

“Functional foods” and “superfoods” are often marketed as “nutrient rich” and may provide certain perceived health attributes. The Institute of Food Technologists (IFT) Expert Report defines functional foods as “foods and food components that provide a health benefit beyond basic nutrition (for the intended population). Examples may include conventional foods; fortified, enriched, or enhanced foods; and dietary supplements.” Certain foods such as blueberries, cranberries, walnuts, spinach, and dark chocolate, may sometimes be called potential superfoods, because they may contain higher levels of certain vitamins,

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antioxidants, or other nutrients thought to be beneficial though it's a new and emerging area that needs further research.

“Consumers have long been trained to buy fortified foods, because of a strong belief in the virtue of getting extra basic vitamins and minerals (e.g., vitamin C, folic acid, vitamin A and D),” says Laurie Demeritt, CEO, The Hartman Group. She adds that “the list of potentially healthy ingredients/nutrients is changing rapidly — almost on an annual basis.”

In April, IFT contributing editor, A. Elizabeth Sloan, outlined food trends for 2014 which pointed to consumers shifting away from nutritional supplements toward consumption of fortified and functional foods to obtain nutrients, vitamins, minerals, herbs/botanicals, and more omega-3s in their diets.

Indeed, food manufacturers are responding to consumers' desire for more nutritional benefits by incorporating many of these nutrient-rich ingredients into their products. For example, says Demeritt “snacks containing naturally occurring protein and fiber are appealing to consumers looking to replace, bridge and upgrade their current snack repertoire.”

Sloan also predicted that for 2014, digestive health and immune health would continue to be important to consumers, potentially leading to demand for more products with probiotics.

Indeed, Greek yogurt has exploded onto store shelves, with 50 percent growth from 2012 to 2013. Featuring probiotics that may aid digestive health, Greek yogurt has consumers flocking to it for its nutritional claims. In fact, the top two new food or beverage products in 2013 were both Greek yogurt: the Dannon® brand's Light & Fit®¹ Greek yogurt was the best-selling new food product of 2013 with \$145 million in first-year sales, followed by the Yoplait Greek 100® with \$135 million in first-year sales.

Today, consumers are doing much more than just avoiding too much of something in their diets. Today's consumers are actively seeking out nutrients to incorporate into their everyday diet. And manufacturers are responding.

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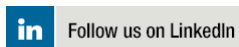
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Slow and Steady Wins the Race

Innovative Ingredients for Steady Energy

Energy is something many Americans would like more of—energy to get through the work day, energy to enhance physical or athletic performance, energy to stay awake or focused, or simply energy to combat everyday fatigue. In today's marketplace, what kinds of ingredients do we see being used to make foods and beverages that claim to supply a steady source of energy?

Jack Heffern, market development manager for Cargill, defines food and beverage products for “steady” energy as those that provide consumers with a steadier source of fuel to engage in everyday activities without experiencing peaks and valleys in energy levels. For example, many foods and beverages claim to give consumers an instant energy “boost” (primarily from caffeine and/or sugar), which is often followed quickly by a perceived crash in energy. While some consumers still seek this type of quick energy fix, “there is a growing consumer desire for a source of energy that doesn't have the ‘highs and lows,’” he explains.¹

Heffern explains that food and beverage producers may want to consider Cargill's **Xtend®² sucromalt**, a nutritive sweetener that contains slowly digestible carbohydrates as a source of steadier energy for applications in this area. “Sucromalt has a low glycemic index, which may help to support a healthy blood sugar response (already in the normal range). It provides carbohydrates or energy with less fluctuation in blood sugar levels after eating as compared to other more rapidly digested carbohydrates. Sucromalt can be used as a carbohydrate source and sweetener for many food and beverage applications,” he says.³ “However, the glycemic index or glycemic impact of the food/beverage or meal will depend on its final formulation and composition during the eating occasion.”³

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Heffern adds that Xtend® Sucromalt has similar functionality to other nutritive syrups. “It is heat and acid stable, and is 70% as sweet as sucrose. Based on its composition (a mixture of slowly digestible higher saccharides with mono- and disaccharides), it may enable sugar reduction in a formulation, by itself, or with high intensity sweeteners,” he says.³

Steady energy products are gaining momentum in the market, and as a result, food and beverage manufacturers are seeking ingredients that may offer such steady-energy properties, concludes Heffern. “And, for a slowly digested low glycemic index sweetener like Xtend® sucromalt, that’s pretty, well, sweet!”³

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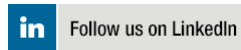
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Reinventing Popcorn

From savory to sweet, new flavors are popping up in this snack category.

Popcorn has been an all-time American favorite in homes and movie theaters for decades. Yet, today's popcorn has had a face-lift to appeal to both the health-conscious consumer and those looking to indulge. Gourmet, ready-to-eat popcorn makers, in particular, are experimenting with innovative flavors to give consumers a new spin on popcorn.

“Popcorn is hitting this sweet spot for snack foods—it can be sweet, savory, or salty,” says Matthew Hudak, research analyst for Euromonitor International. Packaged popcorn sales have grown from \$918 million in 2012 to \$1.34 billion in 2014, according to Euromonitor International; and 2014 is the first year in the last five years packaged popcorn has outpaced microwave popcorn in retail sales. Indeed, Nielsen reports that caramel corn/popped popcorn dollar sales have grown by nearly 25% in the past year and popped popcorn varieties have grown by 30% in the past year. Compared to a -2.4% decline for unpopped popcorn (e.g. microwaveable), the trend toward ready-to-eat popped popcorn appears to be strong.

In addition, certain lines of popcorn are being touted as a more “healthful” choice for snacking. Low-calorie varieties, such as SkinnyPop®¹ and Popcorn, Indiana's®² FIT™³, usually have only 30-40 calories per cup. Indulgent savory and sweet varieties can sometimes add to the calorie count, but the whole-grain, fiber-rich aspects of popcorn attract consumers of all ages. “Popcorn is a satisfying health snack—you can eat a lot of it and not feel guilty about it,” says Hudak.

“Our customers generally are very nutrition conscience,” states Cecilia Johnson, office manager for 479°™⁴ popcorn. Hudak says that brands such as SkinnyPop®, Boomchickapop®⁵, Popcorn, Indiana® and others are filling a unique all-natural popped

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popcorn niche. “The health aspects of all-natural, gourmet popcorn include gluten-free, peanut oil-free, few ingredients, and a popcorn that isn’t loaded with preservatives,” says Hudak. Whole Food’s® 365 Everyday Value®⁶ Organic popcorn also comes in a reduced sodium and reduced fat variety. To that end, many parents feel comfortable letting their kids gobble up these “all-natural”, ready-to-eat popcorn varieties.

Many popcorn makers started from humble beginnings. Angie’s™⁷ (maker of Boomchickapop® and Angie’s™ Kettle Corn) started out as a husband (teacher) and wife (nurse) team making small batches of kettle corn in their home kitchen and selling it at events. At 479°™, founder Jean Arnold took her culinary training and put it to the test on one of her family’s favorite traditions growing up—making homemade popcorn. Arnold’s 479°™ is pushing the envelope with trendy flavors such as Creamery Butter, White Cheddar + Black Truffle, Farmers Market Herbs, Toasted Sesame + Seaweed, and Chipotle Caramel + Pumpkin Seeds. Johnson says, “Sea Salt Caramel is a big favorite across gender and age. [It] has mass appeal without being too exotic.”

While sea salt, caramel, kettle corn, and white cheddar may be more familiar standards when it comes to popped popcorn, “brands are also beginning to venture into adding new and different spices,” according to Hudak. Popcorn, Indiana®, for example, has introduced Sriracha and Chile Cheese varieties, punched up with flavor from various peppers to create spicy combinations. The company also launched ready-to-eat movie theater popcorn that consumers can warm up in a special microwavable bag to get the authentic “movie theater” popcorn experience. Popcorn makers are also branching into limited editions for different seasons and holidays. This holiday season, 479°™ is offering a limited edition Pumpkin Pecan Praline for the fall and Angie’s™ is offering three “Holidrizzle” varieties: Dark Chocolatier Sea Salt; White Chocolatier Peppermint; and Iced Gingerbread.

With a focus on “healthful”, yet tasty and sometimes indulgent snacks, Johnson believes the “future is looking very bright for the popcorn category.”

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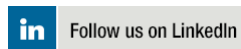
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The Millennial Influence

Millennials are an important cohort of today's consumers that is garnering attention from restaurants and food producers alike.

Bold. Adventurous. Diverse. Connected. Generally born between 1977 and 1995 and representing 77 million Americans, millennials have grown up in an ethnically and racially diverse culture. Younger millennials are almost constantly connected through their digital devices and social media, and are socially conscious, as well. The Great Recession hit this generation hard, with millennials accounting for 40% of the unemployed, or close to 4.6 million people. They watch their pocketbooks and are frequently on the prowl for a good deal. Despite the financial hardships the millennials are facing, the Pew Research Center describes them as "confident, self-expressive, liberal, upbeat, and open to change."

When it comes to food choices, millennials are looking for unique and authentic experiences. "They are young food lovers," says Marc Halperin, COO and principal of CCD Innovation. Millennials seek bold, flavorful, high-quality foods but also at a value. They buy locally made goods, value their families, friends, and communities, and want to share their food experiences with them. Convenience and speed are important to millennials, but so are comfort and indulgence. Ethnic cuisine appeals greatly to millennials' desire for strong flavors, with authentic and regional Italian, Mexican, and Asian flavors topping the list. They aren't afraid to try unorthodox flavor combinations such as a Mexican spice paired with Thai cuisine. "They love experimentation and mixing things together—or 'mash-ups,'" explains Halperin.

To that end, ShopHouse Southeast Asian Kitchen®¹ is a Southeast Asian spin-off of Chipotle Mexican Grill®² and offers customers creative customization while appealing to millennials' preference for bold, ethnic flavors. Starting with a base (rice, noodles or salad), individuals can add a protein (meat, such as chicken satay, or meatless tofu), vegetables like roasted

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chili jam green beans or charred corn, curry or tamarind sauces, and toppings such as crushed peanuts or Thai chilies to round out their bowl. Adding texture they can taste, see, and hear is paramount to the millennials' ideal food experience, says Halperin. "These hedonic experiences play very heavily with this group," states Halperin.

When cooking at home, millennials tend to choose foods that are semi-prepared, such as preseasoned meat or pancake batter. They are "sensibly involved" in their food and enjoy customizing meals but don't want to make everything from scratch. "They aren't becoming master chefs," says Darren Seifer, U.S. food and beverage industry analyst at The NPD Group, Inc., "They like convenience, but they also want to say they took their food across the finish line."

In addition, the lines are beginning to blur between snacks and meals for this generation. One growing food segment for millennials is ready-to-eat "better-for-you" snack foods, such as yogurt, granola, snack bars, and fruit, with an expected 4.5% growth in consumption from 2013 to 2018, according to The NPD Group, Inc. Savory snacks are expected to continue to be a large share of snack foods, but growth is expected to be flat; sweet snacks are expected to decline with millennials. "Anything with a health halo does well with this group," says Seifer. "They eat it up."

Foods on the perimeter of the grocery store such as fruits, vegetables, and protein are important to millennials. Due to many millennials' "flexitarian" (semi-vegetarian) eating behaviors, they are often open to alternative proteins and meatless options, such as nuts, seeds, vegetable protein, nut butters, and Greek yogurt, as well.

Seifer advises to "think young, and think multicultural" when targeting millennials. Having food "my way" will also influence where and how millennials eat, adds Halperin.

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