

# Health & Well-Being Trends: Nonsense or Potential for Profit?

Imperial College  
London

Dr. David Hughes  
Emeritus Professor of Food Marketing

**meatup** Seminar Programme  
NAEC Stoneleigh, UK  
Wednesday, July 1<sup>st</sup>, 2015



@profdavidhughes

[www.supermarketsinyourpocket.com](http://www.supermarketsinyourpocket.com)



# High-protein diet of meat and cheese linked to middle-aged cancer and death

Too much animal-based proteins could lead to early death, study says

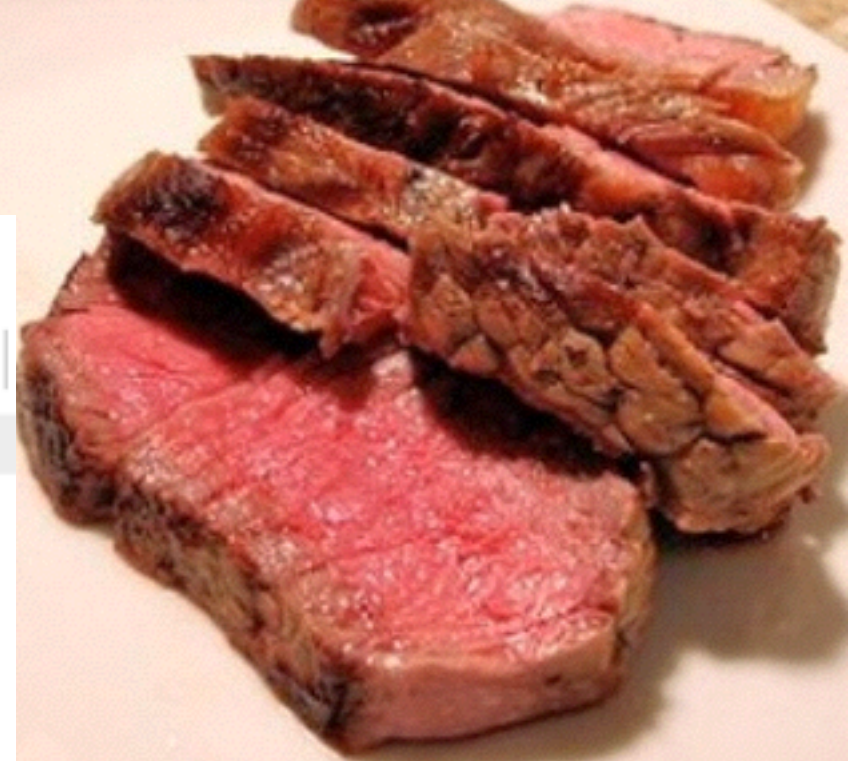
theguardian

News | Sport | Comment | Culture | Business | Money | Life & style |

News > Science > Nutrition

## Diets high in meat, eggs and dairy could be as harmful to health as smoking

People under 65 who eat a lot of meat, eggs and dairy are four times as likely to die from cancer or diabetes, study suggests



## Meat and cheese may be as bad for you as smoking

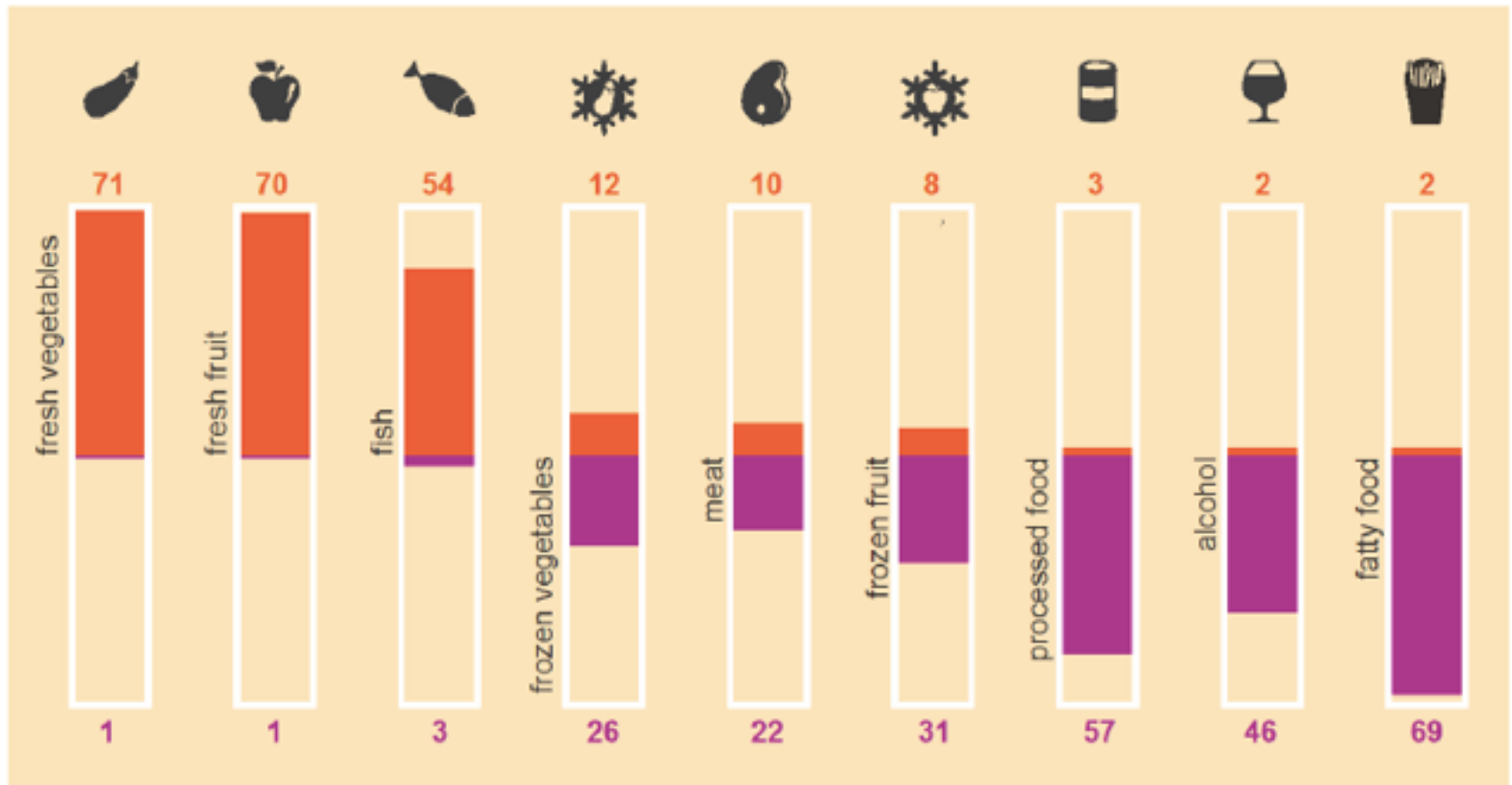
Although Chicken Seen as a “Healthier Meat” and Fish as a Paragon of Healthy Eating (but is it sustainable?)



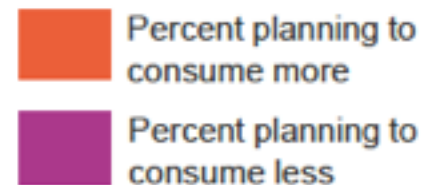
## What Consumers Believe Can Really Help Their Health

Source: Healthy, Wealthy & Wise  
dunnhumby Global Trends Unit  
Global Survey, 2014

## Planned changes in food consumption in the next six months



Source: Healthy, Wealthy & Wise  
dunnhumby Global Trends Unit  
Global Survey, 2014





# Global Trends for Innovation “SIAL World Trends Tour”

## Attributes of Successfully Launched Products, 2014



- tasty/irresistible (addictive?!)
- convenient (buying, preparing, eating)
- health, nutrition and wellness hooks
- local (provenance, heritage, producer link)
- values – environment, sustainability, animal welfare
- natural, minimally processed, “clean” simple ingredients
- “magical” health properties ( e.g. omega-3 and fish)
- premium: affordable luxury/indulgence
- classic comfort foods with modern retro twist
- pack sizes to meet my family’s eating occasions
- snackable



# IRI NPD Poll of Top Selling Food & Beverage Products in the USA, 2014

## Shared Attributes of Top Selling Products:

- snack-friendly, portable, convenient (quick/easy)
- health & well-being hooks (controlled cals, etc.)
- indulgent, but affordable treats
- natural, simpler ingredients (but still many)

Kraft



Lunchables \$143 million



STRAW-ber-RITA  
\$132 million





# Top 5 Most Successful Food Product NPD Launches UK, 2014



£46.0 m.



£29.4 m. (£6.7 m. ad spend)



£25.4 m.



£23.0 m.



£17.3 m.



Source: Kantar Worldpanel, 2015





"I'm betting on junk food"!



The future is all about fresh, natural, minimally processed, health and well-being, green .. etc.? Warren Buffet isn't betting on an immediate global dietary transformation! (he's a big Coke & Burger King investor and co-owns Heinz and Kraft).

Addictive power of fat, sugar and salt!



Not All Companies  
Follow the Health &  
Well-Being Route!



**Dr. Food** @ProfDavidHughes

USA's Fatburger coming to London: large burger, chili cheese fries & onion rings, chocolate shake a modest 2900 cal!



The Widowmaker 1 lb. Burger for Hungrier Customers.  
Taking the Indulgent rather than Health & Well-Being Route.  
(with “cheese fries”, it just tops the 3,000 calories hurdle!).

**WING ZONE**

DELIVERY & TAKEOUT



**Wing Zone introduced the Widowmaker, a hamburger with four quarter-pound patties, four slices of American cheese and four slices of bacon on a brioche bun.**

*Photo courtesy of Wing Zone*

**(US\$12.99)**

# WHO boss says Big Food, Big Soda and Big Alcohol as bad as Big Tobacco



Public health faces "daunting challenge" from "Big Food", Dr Chan believes

## FOOD POLITICS

JUN  
27  
2013

### World Health Organization takes on the food industry

I've just been sent a copy of [the opening address](#) given by the Director-General of the World Health Organization, Dr Margaret Chan, to a Global Conference on Health Promotion in Helsinki on June 10.

Here is an excerpt from her extraordinary remarks:

Today, getting people to lead healthy lifestyles and adopt healthy behaviours faces opposition from forces that are not so friendly. Not at all.

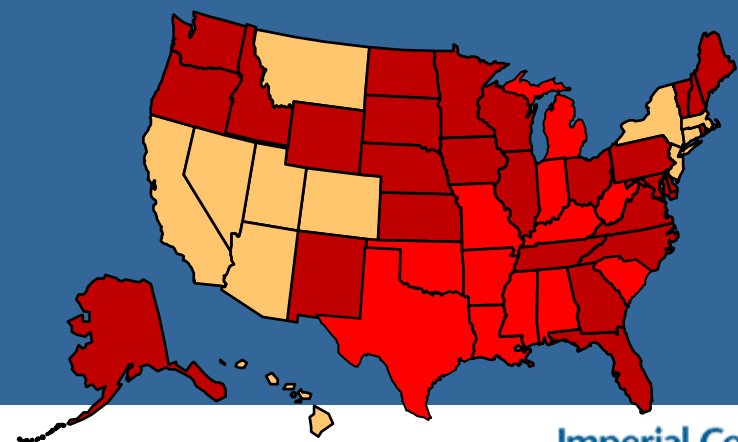
Efforts to prevent noncommunicable [chronic] diseases go against the business interests of powerful economic operators.

In my view, this is one of the biggest challenges facing health promotion...it is not just Big Tobacco anymore. Public health must also contend with Big Food, Big Soda, and Big Alcohol.

## Mexico takes title of "most obese" from America



## Self-Reported Obesity Among U.S. Adults



Imperial College

20%–<25%	25%–<30%	30%–<35%
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*Coca-Cola*

**“Smart” Marketing Idea  
Turns Sour as Anti-Coke  
Activists Go Viral!**





# Dunkin' Donuts to remove titanium dioxide from donuts



The baked goods giant says it will remove whitening agent from its powdered donuts over fears it might contain toxic nanomaterials



# **SUBWAY:** Stop Using Dangerous Azodicarbonamide in Your Bread!



Azodicarbonamide is the same chemical used to make yoga mats and shoe rubber. It's banned all over the globe because it's linked to respiratory issues, allergies and asthma. **This is not eating fresh!**

North America

**VS**

UK, EU, Australia

Subway uses **Azodicarbonamide** in their 9-Grain Wheat, 9-Grain Honey Oat, Italian White, Italian Herbs & Cheese, Parmesan/Oregano, Roasted Garlic, Sourdough, and Monterrey Cheddar breads.

Subway **does not** use Azodicarbonamide in other countries.



**We deserve the same safe ingredients that Subway uses around the world.**

**SIGN THE PETITION:** [foodbabe.com/subway](http://foodbabe.com/subway)  
#NoWaySubway



Subway to remove 'dough conditioner' chemical from bread



Imperial College  
London



**SCRAMBLED EGG PATTY** (WHOLE EGGS, WHEY, EGG WHITES, NONFAT MILK, SOYBEAN OIL, MODIFIED FOOD STARCH, CONTAINS TWO PERCENT OR LESS OF DICALCIUM PHOSPHATE, SALT, SODIUM BICARBONATE, XANTHAN GUM, GUAR GUM, CITRIC ACID, PEPPER), **MULTIGRAIN FLATBREAD** (WATER, WHOLE WHEAT FLOUR, ENRICHED FLOUR [WHEAT FLOUR, MALTED BARLEY FLOUR, NIACIN, REDUCED IRON, THIAMIN MONONITRATE (VITAMIN B1), RIBOFLAVIN (VITAMIN B2), FOLIC ACID], YEAST, SUGAR, WHEAT GLUTEN, OAT FIBER, WHEAT BRAN, CONTAINS TWO PERCENT OR LESS OF MODIFIED WHEAT STARCH, VINEGAR, SOYBEAN OIL, SALT, CULTURED WHEAT FLOUR, ROLLED WHEAT, CULTURED WHEAT STARCH, RYE NUGGETS, CORN GRITS, ROLLED OATS, MONOGLYCERIDES, RYE FLAKES, SODIUM STEAROYL LACTYLATE, TRITICALE FLAKES, BROWN RICE FLOUR, MONOCALCIUM PHOSPHATE, CALCIUM SULFATE, GUAR GUM, BARLEY FLAKES, HULLED MILLET, WHOLE FLAX SEED, ENZYMES, ASCORBIC ACID, CALCIUM PROPIONATE [PRESERVATIVE]), **SAUSAGE PATTY** (PORK, MECHANICALLY SEPARATED TURKEY, WATER, SALT, SPICES, CORN SYRUP SOLIDS, DEXTROSE, SPICE EXTRACTIVES), **PASTEURIZED PROCESS WHITE CHEDDAR CHEESE PRODUCT** (CHEESE [PASTEURIZED MILK, CHEESE CULTURES, SALT, ENZYMES], WATER, CREAM, SKIM MILK, SODIUM PHOSPHATES, CASEIN, NATURAL CHEDDAR CHEESE FLAVOR [CHEDDAR CHEESE (PASTEURIZED MILK, SALT, CHEESE CULTURE, ENZYME), WATER, SODIUM PHOSPHATE, SALT, BUTTER OIL, XANTHAN GUM], SALT).



**Convenient but are they consonant with consumer trends for natural, lightly processed, “clean” labels?**



# General Mills to Remove Artificial Flavors & Colors From its Cereals

Email  Print  Share



23 Jun 2015 --- US food giant General Mills cereals has joined a number of other food producers by making a commitment to remove artificial flavors and colors from artificial sources from 90% of its cereals in response to consumers' changing preferences. It plans to have more than 90 percent of the portfolio free of artificial flavors and colors by the end of 2016.



## Coca Cola Enterprises Makes 10% Full Range Calorie Reduction Pledge by 2020



Launched in 2009: Early Adopter of “Clean and Clear” Ingredients



NO ONE  
EVER  
SAYS  
“MMM,  
SODIUM  
STEAROYL  
LACTYLATE”

At Nature's Pride® we don't think you should put anything in your mouth you can't pronounce. So taste the difference natural makes.


**100% NATURAL. 100% DELICIOUS.™**

[Nature'sPrideBread.com](http://Nature'sPrideBread.com)



For ketchup bursting  
full of Heinz Tomatoes



For more tomato growing activities visit us on Facebook 

IT HAS TO BE **HEINZ**



# Ingredient List:

## Beef



### Nutrition Facts

Serving Size 4 oz (112g)

raw, as packaged.

Servings Per Container varied

Amount Per Serving

**Calories** 150    **Calories from Fat** 50

% Daily Value\*

**Total Fat** 6g 9%

Saturated Fat 2.5g 13%

**Cholesterol** 70mg 23%

**Sodium** 75mg 3%

**Total Carbohydrate** 0g 0%

**Protein** 24g 48%

**Iron** 15% \*

Not a significant source of dietary fiber, sugars, vitamin A, vitamin C, and calcium

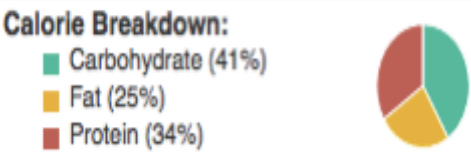
\* Percent Daily Values are based on a 2,000-calorie diet

Nutrition Facts	per 400g pack (400 g)
Energy	1423 kj 340 kcal
Protein	28 g
Carbohydrate	32.8 g
Sugar	2 g
Fat	8.8 g
Saturated Fat	4.4 g
Fibre	4.4 g
Sodium	0.72 mg

[Edit this Food](#)

Information for this food was submitted to the FatSecret food database by [rob turner](#) on 14 Feb 13.

Is this information inaccurate or incomplete?  
Click [here](#) to edit.



\*Based on an RDI of 2000 calories



Health & Well-Being A Major Driver of Sales







After China Meat Scandal, Troubles for OSI Reflect Broader Perils for Business

# KFC's China sales plunge on tainted food scare

By Paul R. La Monica @lamonibuzz September 4, 2014: 9:59 AM ET



**McDonald's, KFC in China caught up in scandal over expired meat**



**Bird Flu Threatens KFC's New Year Recovery**

lege



**COPS 'KILLER' STANDS TRIAL**  
 That was the headline of a news item about a trial in Oregon. It was a story about a man who had been charged with the murder of a police officer. The headline was a play on words, as the man was not a 'killer' but a 'cop'.

**EXCLUSIVE** **IT'S SHERGAR & PASTA**

# 99% HORSE IN FINDUS LASAGNE



Alert... food firm's pasta dish

**By STEVE HAWKES**  
 BEEF lasagne meals sold by Findus were up to 99 per cent horse, it emerged last night. Scandal-bred trigger-happy firms they also contained a cancer-causing preservative used by vets. Mistakes were covered over the scandal and consumers warned to take meals back to shops.  
 Full Story - Page Four

**And traces of animal painkiller**





# Food safety inspectors investigating horsemeat scandal find pizza with 35 ingredients from 60 countries

- The ready meal contained 35 different ingredients from all around the world
- It was used as an example to show how difficult it is to verify food's origins
- Watchdog the National Audit Office claims that 'food fraud' is rife

**BEWARE  
“MEAT-GATE”!**

As the range of meat products with “Credence Attributes” increase, so will the risk of Fraud.

## Crime gangs expand into food fraud

Draft EU report says increasingly sophisticated techniques being used to counterfeit and adulterate food

**US sets up fish fraud task force**

# MEET THE PRODUCERS

*Experts from around Britain who help us bring 100s of fresh ideas to your table*

ENGLAND



STRAWBERRIES | MARION REGAN

*Awarded an MBE for her services  
to the fruit industry*

SCOTLAND



ORKNEY CRAB | RONNIE NORQUOY

*Fishing for 40 years and helping  
us source sustainable crab from  
the wild Atlantic seas*

WALES



WELSH CAKES | ROBIN JONES

*All our Welsh cakes are hand-  
turned in the bakery*

IRELAND



POTATOES | MICHAEL MCKILLOP

*Plants new varieties every season in  
nutrient-rich soil for delicious  
potatoes full of goodness*



“How’d You Like Your Meat?”

“With Adjectives, Please”:

- free-range ....;
- free-from ..
- British/Yorkshire ...
- Gloucester Old Spot
- Beryl Wilcox’s ....
- grass-fed ...
- organic .....
- new season ...
- happy ...
- environmentally-friendly ...



# Values: For Shoppers, It's Not ONLY about Price



PRICE



PROMOTIONS



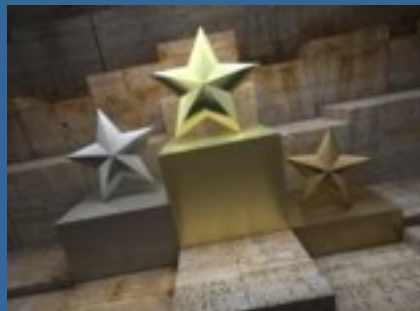
ETHICS



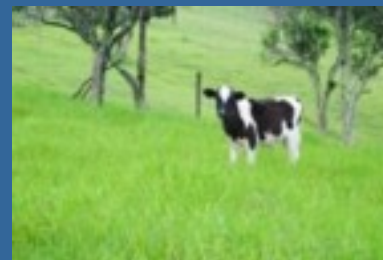
SUSTAINABILITY

*VALUE*

*VALUES*



PERFORMANCE



PROVENANCE



HERITAGE



PACK SIZE



# How Chipotle Led to McDonald's Ditching Human Antibiotics

## KFC faces pressure after McDonald's says no antibiotics in chicken

## McDonald's to cut use of antibiotics in chicken

# Perdue Significantly Cuts Antibiotic Use in Chickens

## Tyson to phase out antibiotics in chicken

Tyson Foods on Tuesday became the latest chicken company to begin phasing out antibiotics amid concerns that they are overused and could be putting humans at risk.

### KEEP HORMONES AND ANTIBIOTICS OFF THE MENU

October 1, 2013

Meat may seem to be a fundamentally natural product, but the beef, pork, chicken, turkey, and more that graces our tables typically comes from animals treated with hormones and other unappetizing substances.



Imperial College London



100% GUARANTEE



100% pure beef

Raised without  
the use of hormones  
or steroids

No preservatives  
or additives



FEATU  
BURG

ROOT BEER  
**ROOT**  
BEER  
**ROOT**



*One hot day*  
IN JUNE OF 1919  
ROY ALLEN  
SERVED  
**THE FIRST**  
*fruity mix of creamy*  
A&W ROOT BEER



**RAISED**  
*without*  
- ANY ADDED -  
**HORMONES**  
OR **STERIODS**

**NO**  
PRESERVATIVES  
*Or additives*





## CARL'S JR. REVOLUTIONIZES FAST FOOD WITH NEW ALL-NATURAL BURGER

*New All-Natural Burger features the first all-natural, no added hormones, no antibiotics, no steroids, grass-fed, free-range beef patty from a major fast food company*



WHAT IS

# FOOD WITH INTEGRITY?

FOOD WITH INTEGRITY IS OUR COMMITMENT TO FINDING THE VERY BEST INGREDIENTS RAISED WITH RESPECT FOR THE ANIMALS, THE ENVIRONMENT AND THE FARMERS.



It means serving the very best sustainably raised food possible with an eye to great

taste, great nutrition and great value.

It means that we support and sustain family farmers who respect the land and the animals in their care.

It means that whenever possible we use meat from animals raised without the use of antibiotics or added hormones.

And it means that we source organic and local produce when practical. And that we use dairy from cows raised without the use of synthetic hormones.



Food With Integrity is a journey that started more than a decade ago and one that will never end.

ANIMALS ↑

PEOPLE ↑

ENVIRONMENT ↑



## FUNKY CHICKEN &amp; RIBS



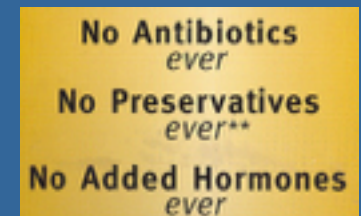
**A lot of our stuff is all natural, organic, chemical free, farm friendly & sustainable but more importantly, it tastes great!**

Start with great ingredients and you get great food. At Funky Chicken we use only the highest quality, local, natural ingredients so you know everything from our mouthwatering chicken & ribs, to our delicious sides and vegetarian option is the best.



# Consumers Want Their Meat “-Free” Across the Globe! And They Want Adjectives Added and Not Additives Added!

- Antibiotic-free
- Hormone-free
- Additive-free
- Campylobacter-free
- Salmonella-free
- E.coli-free
- GMO-free
- Free-range
- Gluten-free



Contact a Salmonella Lawyer Now  
Free Case Evaluation  
**1-888-377-8900**





Not Just Quirky,  
Self-Indulgent  
Rich Countries:  
e.g. Thailand no  
different







Not My Hot Tip for Success  
in the UK Snacking Market!

**NEW**

THE PLANT-BASED PROTEIN THAT  
LOOKS, FEELS, TASTES & ACTS  
LIKE CHICKEN - WITHOUT THE CLUCK.



**BEYOND  
MEAT**

## CHICKEN-FREE STRIPS

Gluten-free | 20g cholesterol-free protein | Vegan

**LIGHTLY SEASONED**



PLANT-BASED PROTEIN MADE FROM SOYBEANS & PEAS\*

100% PLANT PROTEIN.

ONLY 2g SATURATED FAT,  
WITH 10g OF PROTEIN  
PER SERVING.



**BEYOND CHICKEN**

SESAME GINGER POPPERS



NEW! 1.5 OZ (42g) | 100% MEAT, CHICKEN, LIVER



**SESAME GINGER  
POPPERS**

**BEYOND**  
meat



100% PLANT PROTEIN.

ONLY 2g SATURATED FAT,  
WITH 10g OF PROTEIN  
PER SERVING.



**BEYOND BEEF**

SWEDISH MEATBALLS



NEW! 1.5 OZ (42g) | 100% MEAT, CHICKEN, LIVER



**SWEDISH  
MEATBALLS**



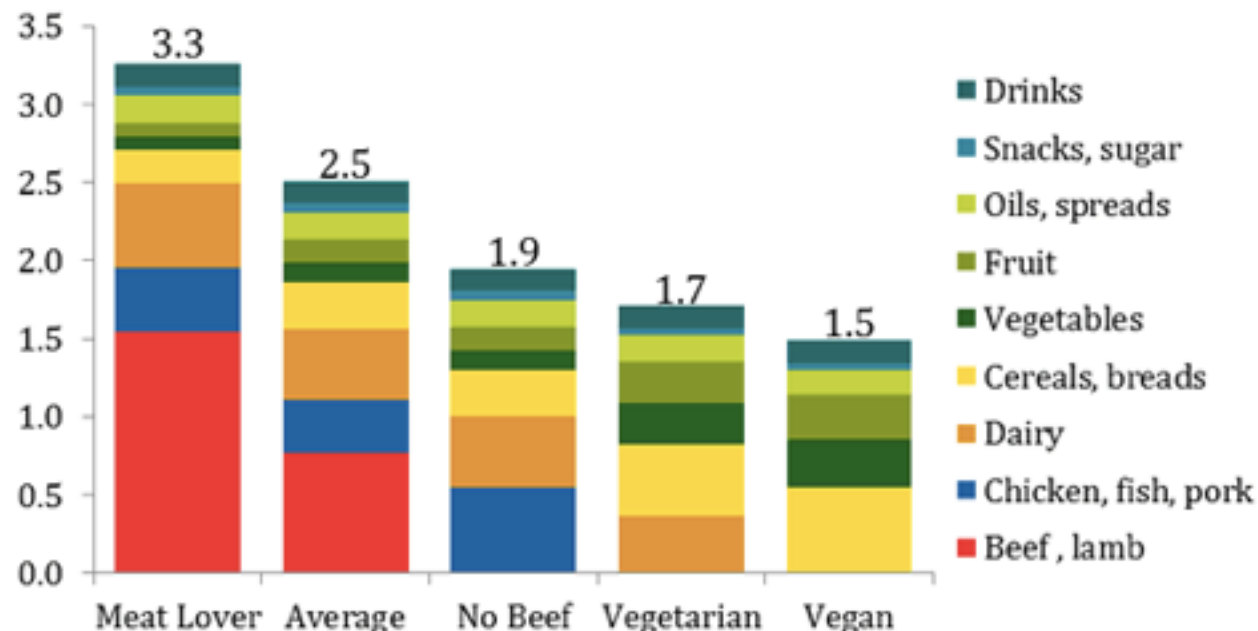
**HAMPTON CREEK<sup>™</sup>**  
*Food*

Bill Gates had a free sample.  
And now it's your turn.



Beef and Lamb  
Receive a Very  
Bad Press on  
Enviro-Impact

## Foodprints by Diet Type: t CO<sub>2</sub>e/person



Note: All estimates based on average food production emissions for the US. Footprints include emissions from supply chain losses, consumer waste and consumption.. Each of the four example diets is based on 2,600 kcal of food consumed per day, which in the US equates to around 3,900 kcal of supplied food.

Sources: ERS/USDA, various LCA and EIO-LCA data

Shrink That Footprint

## Giving up beef will reduce carbon footprint more than cars, says expert

Study shows red meat dwarfs others for environmental impact, using 28 times more land and 11 times water for pork or chicken

theguardian

Imperial College  
London

# What does it take to make a ¼ lb. burger?



feed

**6.7**

Pounds of grain  
and forage



water

**52.8**

Gallons for drinking and  
irrigating feed crops



land

**74.5**

Square feet for grazing  
and growing feed crops



energy

**1,036**

BTUs for feed production  
and transport – enough to  
power 7 iPads



GHG

**13.4**

Pounds of CO2 equivalent  
released



Grass-Fed Beef, Often, Gets Unwarranted Bad Press on Its Environmental Impact.

It's a Communication Issue.



# Buy Me Because I'm Green and Healthy!

- being “Green” (incl. Healthy) will not be a point of differentiation
- few/clean/clear ingredients is part & parcel of being “Green”!
- increasingly, consumers will simply expect “Green” and “Healthy” (say they’ll pay a premium but they won’t!)
- 3<sup>rd</sup> party accreditation important
- need consumer understanding of “why Green”. It means different things to different consumers: e.g. saving the world, or saving my children?
- few, simple direct messages (don’t dilute)
- tell your unique story
- your business must live by what you promise
- two-way communication between you and your customers – are we on track? (use of social media)

# Marketing Opportunities for Meat on Health

- red meat struggles to claim the high ground on health vis-à-vis chicken and particularly fish
- constant PR to reinforce health credentials of meat
- but taste/enjoyment and convenience trump health!
- be part of the meal solution not the meal problem
- health perceptions of food are complex and bundle nutrition up with provenance, safety/integrity, story etc.
- health of the planet increasingly important, too, and here red meats have work to do with unprecedented pressure building over this decade and on
- non-meat meals growing in popularity and taste good!
- but, we're carnivores and meat-eating is in our genes!

-



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@ProfDavidHughes

Consumer Blog: [www.drfood.ca](http://www.drfood.ca)

F  Blog: [www.supermarketsinyourpocket.com](http://www.supermarketsinyourpocket.com)

