



WHAT TO EXPECT IN 2021:

The 5 Themes for Natural & Wellness Trends That Will Shape the Industry



THEME ONE

REALISTIC DIETARY HABITS



REALISTIC DIETARY HABITS

Mealtime at Home

The trend of cooking at home is expected to continue once Covid-19 restrictions are lifted. However, shoppers may be experiencing fatigue from preparing so many meals at home. This provides a perfect window of opportunity for kits that help to decrease the effort needed to prepare restaurant-quality meals for consumers and their families as well as create additional easy options for maintaining lifestyle diets.

DIY MEAL KITS

Many retailers are offering home meal kits assembled in-store. Sales of unprepared brands like HelloFresh and Local Crate are surging in conventional retail.

Hello Fresh	+79%
<hr/>	
Local Crate	+64%

NATURAL POSITIONED SHELF STABLE SOLUTIONS

While shoppers may prefer fresh meal solutions for certain occasions, overall growth trends show shelf stable solutions as the preferred everyday choice.

Shelf Stable Entrees & Mixes	+31%
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Frozen Entrees	+17%
<hr/>	
Refrigerated Entrees	+4%

NATURAL POSITIONED REFRIGERATED OPTIONS

There are promising fresh segments to key-in on. While on-the-go segments cut into the category's growth, other meal-driven solution segments skyrocketed.

RF Entrees	+56%
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RF Burritos & Tamales	+24%
<hr/>	
RF Sushi	+8%



REALISTIC DIETARY HABITS

Snacking is reinforced with a look at functional ingredient trends

Shoppers are looking to get more from every bite. Turning to healthy fats like Coconut Oil and MCTs are a direct result of the popularity of Keto and Clean eating trends while Probiotics and Ginger show that shoppers are keying in on digestive health aspects.

What's Hot

Functional Ingredient	\$, % Growth v Yago (Total 52wk Volume)
Protein – Animal – Whey & Egg	+412% (\$0.8m)
Ginger	+323% (\$1.1m)
Coconut Oil	+130% (\$2.3m)
Gluten Products	+66% (\$8.7m)
MCT (Medium Chain Triglycerides)	+65% (\$54m)
Probiotic Supplement	+62% (\$13m)
Protein – Animal - General	+54% (\$7.5m)
Protein – Plant – Pea	+37% (\$31.9m)
Turmeric	+33% (\$0.8m)
Protein – Plant - General	+21% (\$19.3m)

What's Not

Functional Ingredient	\$, % Growth v Yago (Total 52wk Volume)
Fish Oil Concentrate	-50% (\$5.1m)
Guarana	-44% (\$3.5m)
Protein – Animal – Egg	-31% (\$79.7m)
Chia Seed Oil	-29% (\$37.2m)
Cocoa Extract	-27% (\$1.6m)
Protein – Animal - Multi	-25% (\$41.5m)
Protein – Plant - Rice	-24% (\$9.1m)
Antioxidant Combo of A C & E	-21% (\$8.1m)
Whole Foods Concentrate	-16% (\$367.1m)
Soy Foods	-16% (\$635.3m)



THEME TWO

FOOD AS MEDICINE

Core Wellness Ingredients Still Top of Mind

Consumers continue to seek natural solutions with beverages that will boost immunity and reduce stress and anxiety.



IMMUNITY BOOSTING

Immune function | Antioxidants | Antibacterial

Key ingredients: Elderberry, Echinacea, Camu camu

RF Juice, Juice Drinks, Other Func Bevs	+135%
SS Tea Bags Herbal	+131%
SS Tea Bags Green & White	+127%
SS Juice & Juice Drinks	+47%
SS Tea Bags Wellness	+28%



REST & DESTRESS

Anxiety | Stress | Insomnia

Key ingredients: CBD, Melatonin, Theanine, Valerian

SS Coffee RTD	+13,606%
SS Water Sparkling Flavored	+1,339%
SS Water Enhanced	+87%
RF Juice, Juice Drinks, Other Func Bevs	+81%
SS Tea Bags Wellness	+24%



ADAPTOGENS

Fight fatigue | Immunity | Mood enhancing

Key ingredients: Chaga mushroom, Reishi mushroom, Ashwaghandha, Maca, Holy basil

SS Tea Mix & Iced Tea Loose	+81%
SS Coffee Beans & Grounds	+49%
RF Kombucha & Fermented Beverages	+42%
SS Hot Cocoa	+31%
SS Tea Bags Wellness	+30%

FOOD AS MEDICINE

Navigating Beyond the Core

As they seek to improve their health, consumers are expecting more from the foods they eat. Whether looking to shed extra pounds gained in 2020 or to optimize health and mitigate the risks of the virus, these 'food as medicine' themes are resonating with shoppers.



PLANT-BASED

Plant-based lifestyles have been touted for helping reduce cancer, heart disease, stroke, diabetes, and possibly some mental health illnesses

RF PB Grounds	+315%
SS Coffee RTD	+182%
FZ PB Meatballs	+131%
SS PB Milk Coconut	+65%
FZ PB Novelties	+57%



LOW GLYCEMIC & UNSWEETENED

Consumers are increasingly recognizing the many benefits of carefully watching their sugar intake

FZ Novelties	+871,544%
SS Cookies	+2,289%
Bread Loaves	+167%
SS Sodas Alt Sweetened	+96%
Bars Wellness	+22%



NUTRIENT DENSE

Consumers are looking for their products to be packed with heavy loads of protein, ancient grains and other nutrient dense ingredients

SS Crackers Snack & Sandwich	+386,210%
SS Ramen & Udon Noodle Blocks	+53%
SS Cookies Fresh	+43%
SS Pretzels	+26%
FZ Waffles	+19%

WHAT TO EXPECT IN 2021

5 Themes that Will Define Natural & Wellness Trends in 2021



Realistic Dietary Habits

Spotlight on: Functional Snacks and DIY Meal Kits



Plant-based Innovation

Spotlight on: Plant-based jerky, seafood, supplements



Alcohol with a Twist of Wellness

Spotlight on: Lighter calorie and functional beverages



Responsible Body Care

Spotlight on: Superfoods and eco-friendly products



Food As Medicine

Spotlight on: Supplements, functional ingredients, and CBD

Follow the trends at spins.com/resources/trends-research/



Helping shoppers make the switch to better products

Launch your product on Social Nature to drive discovery, trial and insights at your retailers

Jessica Malach, VP Partnerships & Insights
Email: jessica@socialnature.com





Top 5 Permanent Lifestyle Changes

60% preparing more meals at home.

45% taking more preventative health measures.

41% exercising more at home.

38% taking immune supplements.

36% spending more time outside.





Top 5 Permanent Shopping Habits

51% shopping in stores less frequently.

Note: On average 1x week; 28% never shop online for groceries

46% buying healthier products.

43% shopping online from Amazon.

38% buying more products on sale.

31% shopping locally.





Trend #1: Greater focus on health & sustainability



Top health goals for 2021 - 85% of consumers more proactive compared to a year ago

Top 10 Goals

1. 53% Eat healthier
2. 49% Increase exercise/fitness
3. 48% Reduce stress
4. 47% Lose weight
5. 44% Get better sleep
6. 42% Increase energy
7. 37% Be happier
8. 32% Restore emotional balance
9. 27% Improve cognitive performance
10. 26% Improve immune health



Key insight: Consumers are taking a holistic approach to their health.



4 Key Themes & Opportunities

- 1) **Plant-based foods growing in demand across all dietary preferences** - market is broadening.
- 2) **Desire for novelty & new products to support new health routines** 79% purchased new product in last 30 days.
- 3) **Desire for comfort & convenience** - growth in meal-kits, ready-prepared foods, healthier indulgences.
- 4) **Greater storytelling around supply chain:** demand for transparency of ingredient sourcing. Innovations in sustainable packaging.





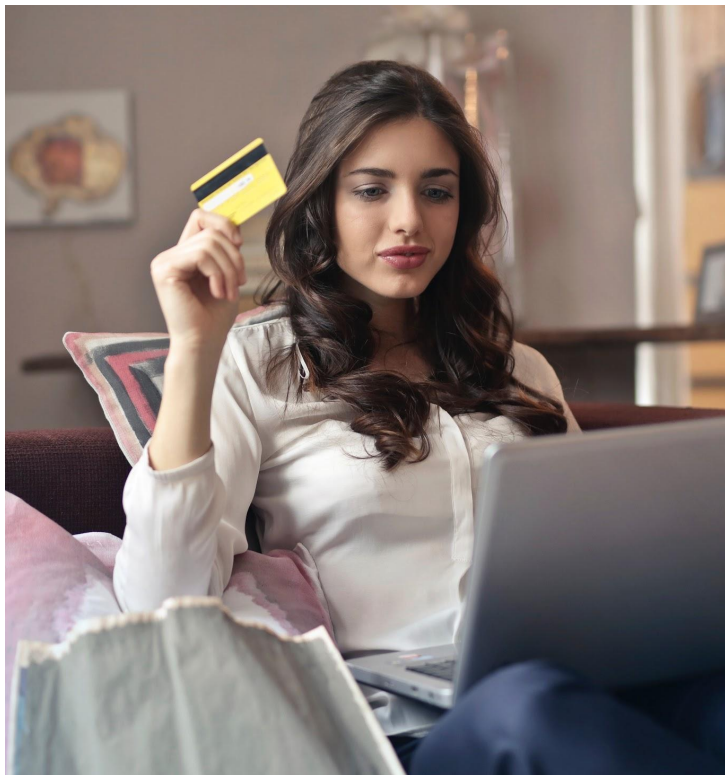
29% said
Brand Mission/Sustainability
is a key factor in brand loyalty



Trend #2: Growth in DTC shopping



Growing opportunity for DTC brands



USA

39%

Canada

40%

Shop brand-direct!

Trend is growing!

Since August 2020: **56% increase in USA**
38% increase in Canada



Top Drivers for Shopping Brand-Direct

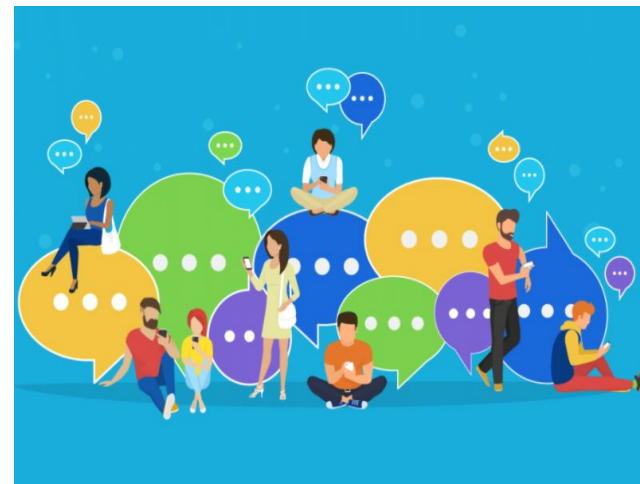
41% products hard to find at other retailers I shop at

29% say want to support mission of company

25% unique bundles/product assortment

20% better customer service

17% subscribe & save program



Tip: 88% said would like to give feedback to brands on new products. **Involve them in your innovation strategy.**



2021 Marketing Trend:

**Digital-first
Retail Marketing**

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Digital-first Retail Marketing: Convergence of traditional shopper & consumer marketing



In-Store

amazon

REAL CANADIAN
SUPERSTORE

Walmart

COSTCO
WHOLESALE

Walgreens

SPROUTS
FARMERS MARKET

Rexall

ShopRite

SAFEWAY

WHOLE
FOODS
MARKET

save on foods

SHOPPERS
DRUG MART

NOFRILLS

LOWE'S

IGA

CRANDALL TIRE

Loblaws

LONDON
DRUGS

TRADER JOE'S

Sobeys

petco

Well.ca

metro

ALDI

Pomme
NATURAL MARKET

THRIFTY FOODS
Eat happy

THE
HOME
DIRECT

SEPHORA

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