What, When and Where

Americans are snacking around the clock. *In fact, snacking accounts for more than half of all eating occasions.* Photo © BLOOMimage/Getty Images, © Purestock/Thinkstock, © eyewave/iStock/Thinkstock, © Olga Nayashkova/iStock/Thinkstock. Image composite by Leslie Pappas

BY A. ELIZABETH SLOAN

America Eats

Changing consumer priorities, including a penchant for around-the-clock consumption and more interest in sophisticated everyday fare, demand close attention from food and beverage companies.

American consumers are reorienting their priorities and behaviors to get just what they want to eat, when and where they want it. While taste still is the most important criteria for food selection (cited by 89% of consumers), followed by price cited by 71%, healthfulness 64%, convenience 56%, and sustainability 36%, consumer priorities are changing. The number of consumers citing price as having a great impact fell seven percentage points from 2011 to 2013, and sustainability was down 16 points. The impact of healthfulness and convenience each rose 3 points since 2012 (IFIC, 2013).

Three-quarters (74%) of consumers bought specialty foods in 2013, up from 66% in 2012. Two-thirds buy gourmet items for everyday meals at home, 63% buy these products to treat themselves, and 30% do so for special at-home occasions (Tanner, 2013a).

More than half of adults buy specialty chocolate, oils, and cheese. Gourmet yogurt, coffee, salty snacks, specialty nonalcoholic drinks, frozen desserts, meat/poultry/fish, and bread/baked goods are bought by more than 40% (Tanner, 2013a).

With those ages 18–24 the most likely to buy gourmet foods and to cut back on restaurant visits, it is essential for packaged goods makers to deliver more sophisticated, restaurant-style products (Tanner, 2013a). Although it is too early to tell if at-home eating is plateauing, the percentage of all meals eaten and prepared in the home in 2013 was exactly the same as in 2012—72.9%, up from 69.8% five years ago (NPD, 2013a).

The percentage of all meals that were carried from home rose by one meal per person over 2012 to 5.1%, still below the all-time high of 5.5% meals per person in 2011 (NPD, 2013a).

Americans ate 13.5 different foods including sandwiches, fruit, vegetables, carbonated soft drinks, milk, coffee, potatoes, salty snacks, juices, and ready-to-eat cereal in a typical day in 2013. The only change from 10 years ago is that salads ranked tenth then, and salty snacks weren't on the list (NPD, 2013a).

Two-thirds of the best-selling new foods/beverages in 2012 touted distinctive or new flavors or combinations, 27% were bite-sized or handheld, 23% added convenience/ease of preparation, 21% were ready-to-use or on-the-go ready, and 5% included a serving dish. One-quarter made a texture claim; 16% were targeted to kids (IRI, 2013a).

With Baby Boomers and seniors now making more visits to every segment of the restaurant business than their younger counterparts, expect menu modifications catering to their food preferences. Over the past five years, restaurant per capita meals and snack occasions for those ages 18–47 fell from 240 visits per person per year in 2008 to 211 in 2012 (NPD, 2013b).

Younger adults have traditionally been the heaviest users of restaurants for dinner, but increasingly foodservices outlets will depend more on older adults to drive dinnertime traffic. Since 2006, restaurants lost over 650 million dinner visits (NPD, 2013c).

U.S. restaurant traffic increased by 1% in the second quarter of 2013 vs one year ago; consumer spending, driven by average check growth, grew 3%. Despite growth, foodservice traffic remains at the 2009 level (NPD, 2013d).

Visits to quick-service restaurants—which represent 78% of industry traffic—were up 1%, fine dining/upscale hotel restaurants up 6%, and fast casual up 8%. Casual dining traffic, after several quarters of declines, held steady while midscale/family dining fell another 2% (NPD, 2013d).

Breakfast traffic rose 3% in the second quarter; p.m. snacks were up 1%. Lunch and supper traffic were flat. The NPD Group forecasts that restaurant traffic will end 2013 flat; spending will rise by 2.7% in 2013 (NPD, 2013c).

McDonald's remains America's largest restaurant chain with U.S. sales of $35.6 billion, +4.2% in 2012, followed by Subway $12 billion, +6.1%; and Starbucks $10.6 billion, +8.7%. Wendy's, Burger King, Taco Bell, Dunkin' Donuts, Pizza Hut, KFC, and Chick-fil-A rounded out the top 10 list (Technomic, 2013a).

The fastest-growing menu categories in limited-service restaurants were Asian/noodle restaurants with sales up 14.6%, bakery café +10.4%, Mexican +9.7%, chicken +8.8%, coffee cafés +7.4%, and sandwich chains +5.9%. Steak grew 5.9%, seafood 4.5%, Italian 2.8%, and Asian 1.9% in the full-service restaurant category (Technomic, 2013a).

Dickey's Barbecue Pit, Firehouse Subs, Jersey Mike's Subs, Raising Cane's Chicken Fingers, Jimmy John's Gourmet Sandwich Shop, Chipotle Mexican Grill,

9 What, When and Where America Eats

***Texas-style barbecue fare** has helped make Dickey's Barbecue Pit one of the nation's fastest-growing restaurant chains.* Photo courtesy of Dickey's Barbecue Pit

Panda Express, Noodles & Company, Wingstop, and Zaxby's were the fastest-growing U.S. restaurant chains in 2012 (Technomic, 2013a).

Half of adults bought prepared foods at a convenience store in 2013. Hot dogs, followed by deli sandwiches, breakfast sandwiches, pizza, and other breakfast foods were the most popular items (CSNews, 2013).

Americans are cutting back on takeout, delivery, and catering orders from restaurants (Technomic, 2013b). Consumers are entertaining more at home; 41% regularly host guests, up from 35% in 2012 (Tanner, 2013a). Four in 10 (42%) planned to serve finger foods, 40% sandwiches, 38% desserts, and 36% everyday meal items (e.g., pizza, wings, and potato salad) when entertaining (Technomic, 2012a).

E-commerce food orders are still less than 1% of all food sales (Bishop, 2013). Forty percent of specialty food consumers bought food online, led by chocolate and coffee (Tanner, 2013a).

Lastly, the U.S. nutraceutical food and drink market experienced its strongest growth in five years, up 15.6% in 2012 (Mintel, 2013a).

Figure 1. Top 10 Eating Occasions in American Food Culture. From The Hartman Eating Occasions Compass database, 2013.

Type of Eating and Occasion	% of All Occasions
Instrumental Afternoon Snack	10.5
Instrumental Lunch	10.1
Instrumental Dinner	9.6
Instrumental Breakfast	9.4
Savoring Dinner	9.3
Savoring After-Dinner Snack	7.1
Instrumental After-Dinner Snack	6.3
Instrumental Morning Snack	5.9
Savoring Lunch	5.8
Savoring Breakfast	5.3

NOTE: Instrumental eating involves eating out of necessity, while a savoring occasion entails a more culinary-driven food experience.

How We Eat

Dramatic changes in Americans' eating practices are creating a plethora of new food/beverage opportunities, forcing an historic reorientation of consumer demands and industry marketing strategies.

According to the Hartman Group's *Eating Occasions Compass* (2013a), consumers' food choices are driven not just by demographics but by the occasion. The Hartman Group has classified contemporary eating occasions into three categories, which increase in sophistication.

• **Instrumental occasions**. This involves eating simply because it's time to do so, or you need to eat. Price sensitivity, an iconic experience (e.g., McDonald's), quick and easy, moderation, positive nutrition, absence of negatives, and functional benefits are important influences.

• **Savoring occasions**. These are higher quality, more sophisticated, and culinary-driven food experiences defined by freshness, unique flavors, compelling narratives/origin, and seasonal or culinary traditions. It's when the food really matters.

• **Inspirational occasions**. At the epicenter of emerging trends, inspirational occasions are often characterized by how the food is produced (e.g., small craft production, organic, heirloom/heritage, artisanal, slow-cooked, etc.).

Although "must-do" instrumental eating occasions are still the most frequent, four of the top 10 eating occasions fall into the savoring category, further reflecting the potential for upgrading traditional fare (Figure 1; Hartman, 2013a).

Eating alone has become as important as eating together. Nearly half (46%) of all adult eating occasions are alone, up from 44% in 2010. Half of these alone occasions take place in the home (Hartman, 2013a).

One-third of adults' solo eating involves savoring. Hartman also observes that when adults eat alone, they are more likely to replace frozen with fresh meals (Hartman, 2013a).

The demise of the family meal continues. Nearly eight in 10 family eating occasions (78%) involve only adult family members and no kids under age 18; this is up from 72% in 2010, and it excludes "couples only" occasions (Hartman, 2013a). Seven in 10 U.S. households have no children under age 18 (U.S. Census, 2010).

Immediate consumption, which is defined as occasions when food is eaten within an hour of purchase, now drives one out of every 10 adult eating occasions; nearly two-thirds of immediate consumption purchases are for snacks (Hartman, 2013a).

8

Most important, as Millennials—those ages 18–34, who now comprise 27% of the population—become full-fledged consumers, appealing to Americans' food preferences will become even more difficult.

For example, 75% of Millennials decide what they're going to have within an hour of eating vs only two-thirds of Boomers; 45% of Millennials and 24% of Boomers have adopted a special diet (e.g., gluten-free or vegan). One-third (35%) of all Millennial eatings involve global cuisine; 56% of Millennials want something healthy for their next snack (Hartman, 2013b).

Millennials are round-the-clock eaters; 12% of their eating occasions are for breakfast, 16% are for a.m. snacks, 15% lunch, 17% p.m. snacks, 18% dinner, and 20% evening snacks (Hartman, 2013b).

Fresh and Convenient

Without a doubt, the biggest change in American eating and food preparation habits is the move to convenient, ready-to-eat fresh fare.

Nearly nine in 10 U.S. households purchased deli prepared foods in the year ending June 15, 2013. Deli prepared food dollar sales rose 7.7% and account for 56% of total deli sales (IDDBA, 2014).

Deli snacks experienced the highest growth, up 16.2%, followed by soups +14.4%, sushi +11.4%, dips/spreads/toppings +10.9%, and appetizers +10.1%. The list of strong sales gainers also includes prepared chicken, entrees, salads, sides, prepared sandwiches, desserts, platters, and pizza. While still a small category, deli breakfast food sales jumped 34.0% (IDDBA, 2014).

Four in 10 shoppers would like to see an expanded salad bar in their store's fresh prepared foods department; one-third seek a taco/burrito/wrap, pizza, or fruit bar (IDDBA, 2013). In 2012, 40% of adults, including half of those ages 25–44, bought fresh retail meal solutions more than four times per month. One in five bought prepared meals for their kids under age 12, and 10% did so for teens (Technomic, 2012b).

Fresh vegetable kits posted double-digit growth for the year ended June 28, 2013 (Strailey, 2013). Fresh convenience meats are also performing well; 42% of consumers use heat-and-eat meats at least once a week, up 4% vs 2012; 39% use ready-to-eat meat, up 6% vs 2010 (FMI, 2013).

Although it is too early to tell if at-home eating is plateauing, ***the percentage of all meals eaten and prepared in the home in 2013 was exactly the same as in 2012.***

Mealtime Choices and Behaviors

On weekdays in 2012, 56% of meal preparers made the prior night's dinner at home from scratch; 24% did so with prepackaged foods needing preparation; 9% used frozen/heat-and-serve packaged foods; 6% bought take-out; and 4% ate at a restaurant (MSI, 2012a).

Poultry was the entrée those surveyed said they had most frequently eaten for dinner in the past week in 2012; it was consumed within the week by 69%. Next on the list was pizza at 44%, soup 37%, fish/seafood 35%, sandwiches 32%, burgers 31%, beef/steak entrées 29%, pork chops/roast 25%, Mexican food 25%, and hot dogs 18% (MSI, 2012a). Shrimp, canned tuna, salmon, tilapia, pollock, pangasius, crab, cod, catfish, and clams were the most consumed fish/shellfish in 2012 (NFI, 2013).

Vegetables round out the dinner menu. Nine in 10 consumers report having vegetables at dinner in the prior week; 78% had potatoes, and 57% had a green salad (MSI, 2012a). Tomatoes, onions, potatoes, carrots, bell peppers, celery, cucumber, lettuce, broccoli, and corn are the most purchased fresh vegetables (Packer, 2013).

For the year ended July 7, 2013, cooking greens, value-added vegetables, packaged salad, squash, and mushrooms posted the highest gains for fresh vegetables; avocado, pineapple, and specialty

Consumers say they'd be more apt to order soup *if it included more vegetables.* ©IldikoPapp/iStock/Thinkstock

8

items had the largest gains in the fresh fruit category (Major, 2013).

Nearly half (48%) of meal preparers buy frozen vegetables, and 42% buy canned; for fruits, the figures are 15% for frozen and 14% for canned (Mintel, 2013b). Grilled chicken, Caesar, taco, Greek, Cobb, and Asian are America's most popular salads; up-and-coming salad dressing varieties include champagne, Greek, Chipotle, and peanut (Technomic, 2012c). Seven in 10 adults use flavored rice mixes; 44% have eaten ancient grains in the past three months (Mintel, 2013c).

Nearly two-thirds of consumers say they would order more soup if it included a serving of vegetables, and more than half would up soup intake if it were high in protein or delivered heart health benefits (Technomic, 2012c).

In the dessert category, cakes account for about half of dessert sales in in-store bakeries. Mini/bite-sized products, donuts, tortes/cube cakes, occasion/hand-cut cookies, tropical flavors/colors, and classic French patisserie are driving in-store bakery sales (IDDBA, 2014).

One in five (18%) often eat frozen dinners; those ages 18–24 and seniors are the heaviest users (Packaged Facts, 2012). Under-20-minute meal preparation rose 11% over the past five years. Crock-pot meals were up 11%, one-pot meals +10%, pastas/casseroles +9%, and meal salads +6%. Frying fell 30%; roasts are declining in popularity, down 10% (FMI, 2013).

Seventy percent of meal preparers used the oven for cooking in the past week, 60% the grill, and 48% the microwave. The breakout of other meal preparation methods include 47% fried, 45% boiled, 43% sautéed, 42% "no cook" preparations, 35% stir-fried, and 33% steamed (Mintel, 2012a).

Delivering on Dayparts

Snacking now accounts for just over half of all eating occasions. One in five people (17%) eat one snack per day; 41% have two, 24% three, 13% four, and 4% five or more (Hartman, 2013c).

More than half (56%) snack in the afternoon, 51% snack at night, 34% in the morning, and 31% midday.

Nearly half (49%) of adults look for snacks that provide an energy boost; 45% seek snacks that go beyond basic nutrition (Wyatt, 2013). Among healthier snacks, frozen yogurt posted the highest growth in volume sales in 2012, up 13.6%. It was closely followed by hummus, +13.5%, light ice cream +7.3%, natural string cheese +6.1%, and nutritional snack/trail mixes +3.5% (Wyatt, 2013).

U.S. retail sales of yogurt are projected to hit $9.3 billion by 2017, a significant increase from $7.3 billion in 2012. Greek yogurt currently holds a 35% share (Packaged Facts, 2013a).

Bananas, apples, strawberries, grapes, watermelon, cantaloupe, blueberries, lemons, and peaches are the most purchased fresh fruits (Packer, 2014). Grapefruit fell off the top 20 list; mangoes moved onto the list (Packer, 2014).

Specialty cheeses account for more than two-thirds of deli cheese sales. Gouda, Brie, blue, and goat cheese are increasingly strong sellers as are Mediterranean and Hispanic cheeses (IDDBA, 2014). More U.S. cheesemakers and retailers are embracing affinage, the art of aging cheeses. Protected Designation of Origin cheese is another hot trend (IDDBA, 2014). Specialty meats (e.g., prosciutto, pancetta, Mortadella salamis, and asada beef) enjoyed the largest gains in deli meat sales (IDDBA, 2014).

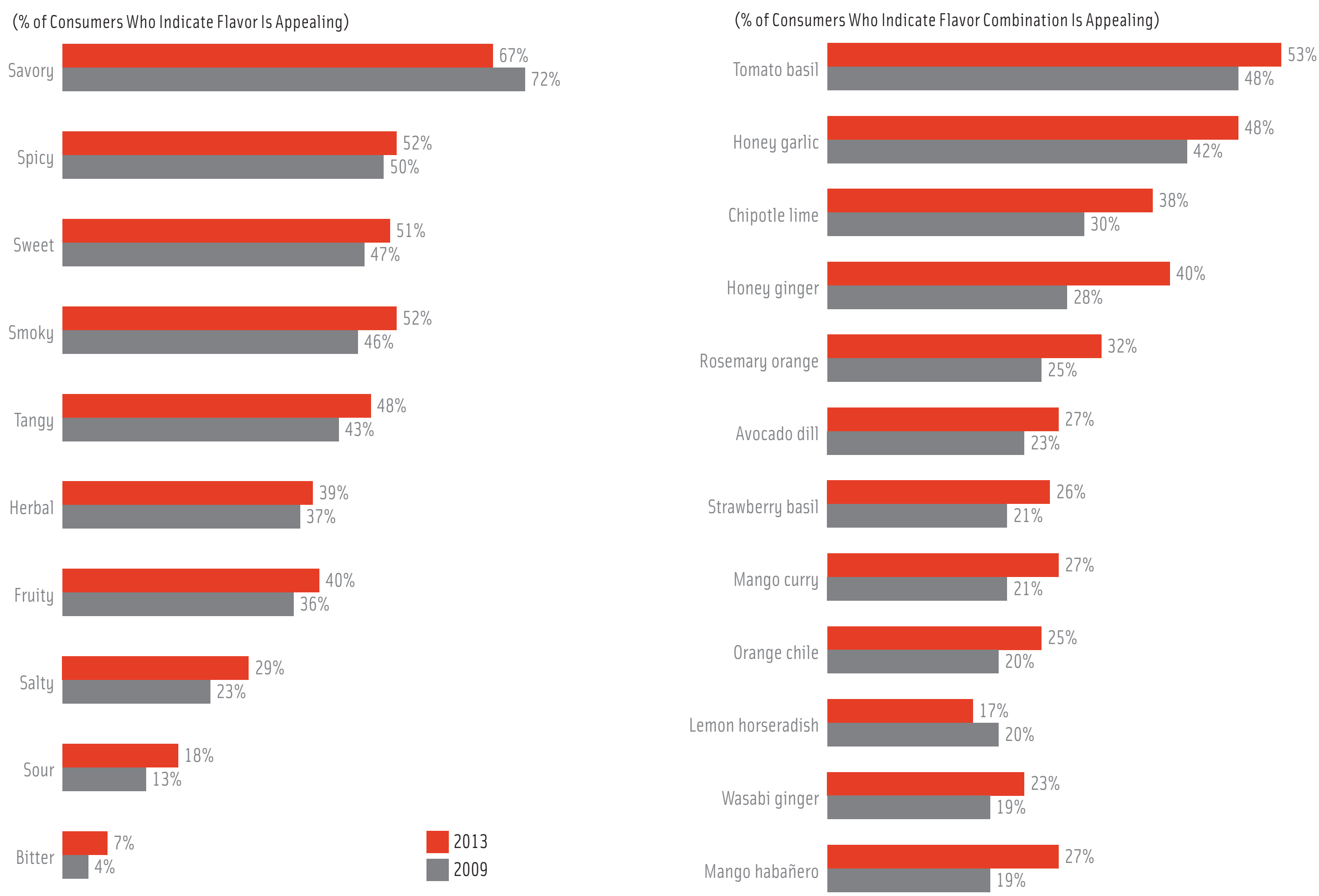
Fried Asian egg rolls/spring rolls, Mexican (e.g., nachos and quesadillas), and boneless Buffalo wings/chicken strips are the most preferred protein appetizers (Technomic, 2013c). Bread appetizers (e.g., garlic bread, bread sticks, and cheese bread) appeal to more adults than any dip including salsa, seafood, spinach/artichoke, and cheese dip (Technomic, 2013c).

About one-third of the best-selling new foods/beverages introduced in 2012 fell into the "breakfast solutions" category (IRI, 2013a). Eight in 10 adults eat breakfast at least sometimes although 57% of adults skip breakfast at least once during the week. About one-third are devoted breakfast-eaters who never pass it up (Technomic, 2013d). Two-thirds of adults eat breakfast at home most of the time, 27% often bring breakfast from home to eat en route to work, and 25% consume it at work (Technomic, 2013d).

Coffee, cold cereal, fruit juice,

***Greek yogurt currently accounts for more than a third** of yogurt category sales.* Powerful Yogurt *in 'man-size' 8 oz. cups is a Greek yogurt targeted specifically to men.* Photo courtesy of Powerful Yogurt

Figure 2. Exploring the Appeal of Flavors and Flavor Combinations From Technomic Inc., 2013



milk, bread, eggs, fruit, hot cereal, tea, and sandwiches are the most-consumed breakfast foods (NPD, 2013e). The percentage of adults having ready-to-eat cereal for breakfast fell from 64% in 2011 to 52% in 2013; those consuming hash browns/potatoes dropped from 46% to 38% (Technomic, 2013d).

In restaurants, flatbread, parfaits, chilaquiles, upscale French toast, burritos, oatmeal, and huevos rancheros were among the fastest-growing breakfast items (Datassential, 2013). One-quarter of adults would like to see more ethnic items at breakfast time (Technomic, 2013d).

Made-from-scratch, real, and house/homemade are the descriptors most likely to increase price thresholds for breakfast offerings. Only one in five consumers are willing to pay more for breakfast fare that is low in fat, carbs, sodium, or calories (Technomic, 2013d). Increased energy/mental focus, weight management, and greater satiation are the top benefits that would persuade noneaters to give breakfast a chance (IFIC, 2010).

Moving to the midday meal, ham, turkey, salami, and beef are the top choices among sliced luncheon deli meats (IDDBA, 2013). Ham and cheese, caprese, pulled pork, Cobb, and fried shrimp are among the fastest-growing sandwiches in restaurants. Brioche, flatbread, pretzel, and ciabatta are the fastest-growing breads (Datassential, 2013).

What's on the Beverage Menu

Milk, followed by fruit juices, bottled water, and carbonated soft drinks are the top beverages; all are consumed by more than six in 10 adults, and milk is consumed by more than nine in 10 (Packaged Facts, 2013b).

Flavored/chocolate milk, high-protein milk, and DHA/omega-3 milk were the big gainers in the milk sector in 2012 (Giles-Smith, 2013). Iced tea is the leading "tier two" beverage; it is consumed by 46% of adults. In addition, sports drinks are consumed by 40%, vegetable juices 39%, diet carbonated soft drinks 33%, ready-to-drink coffee beverages 25%, sparking waters/seltzers/natural sodas 22%, and energy drinks 17% (Packaged Facts, 2013b).

While sales of energy beverages slowed in 2013, the top 10 brands were still up 7.7% for the year ended May 19, 2012 (Anon., 2013). Along with energy drinks, ready-to-drink coffee, bottled water, and ready-to-drink teas are among the fastest-growing beverages (Beverage Marketing Corp, 2013).

8

Liquid/powdered meal replacements were second only to energy drinks as the fastest-growing consumer packaged goods food/beverage item and were the fastest-growing dietary supplement category, with sales up 14.8% to $3.6 billion (IRI, 2013b; NBJ, 2013).

One in five adults uses liquid meal replacements; 40% of parents with kids under the age of 12 purchase them, and 17% of kids. Protein is the top reason for use (Mintel, 2013c). The new wave of high-protein and cereal-enriched breakfast drinks are right on target.

Healthy is now the top consumer high need/high interest attribute for new beverages, cited by 47% of beverage executives, followed by natural/convenience, low sugar, low calorie, high protein, energy boosting, probiotic/prebiotic, and country of origin labeling (Cernivec, 2013).

More than 60% of children under age 12 consume 100% fruit juice, milk, and bottled water. More than half of kids drink fruit drinks/punches, 33% flavored milk mixes, 28% regular carbonated soft drinks, 28% smoothies, 22% sports drinks, 17% nutritional drink mixes, 13% vitamin water, 12% diet carbonated soft drinks, and 7% energy drinks (MSI, 2012b).

Black/green teas, raspberry lemonade, cranberry juice, soy milk, ginger ale, grapefruit juice, and smoothies posted the fastest growth in restaurant beverages (Datassential, 2013).

Flavored Focus

While just over one-third of consumers say they are more interested in trying new ethnic flavors than they were a year ago, "new and unique" flavors are less likely to lure consumers, dropping from 53% in 2011 to 41% in 2013 (Technomic, 2013e).

Consumers are more interested in nearly all of the basic flavor profiles than they were five years ago. They're most interested in savory, including spicy, smoky, and tangy flavors; sour and bitter flavors are also drawing increased interest from consumers (Figure 2).

For the first time, a majority of consumers say they prefer hot or spicy sauces, dips, and condiments and bolder flavors. Chile sauce, cayenne, Sriracha, and habanero and ancho peppers are delivering the "new" heat (Technomic, 2013e).

More consumers also find flavor combinations highly appealing compared to five years ago; 39% enjoy foods with paired flavors, and 30% enjoy fusion dishes (Technomic, 2013e). Tomato-basil, honey-garlic, chipotle-lime and honey-ginger are among the most appealing combinations as are sweet flavors paired with savory, sour, smoky, or spicy (Figure 2).

A signature sauce, particularly one with a unique or flavorful name, can influence about half of consumers to purchase the item (Technomic, 2013e). Bourbon/whiskey, ginger, lemon butter, wine, sesame, and béarnaise sauce are moving mainstream for chicken, pork, or steak. Wasabi, wine, garlic, and Asian sauces have gained in popularity for seafood dishes. Creamy curry and Gorgonzola sauces are fast emerging in Italian cuisines (Technomic, 2013e).

Tropical flavors (e.g., guava and pineapple) are also trending up as are ginger, sour flavors (especially paired with hot and sweet), and regional American flavors (Technomic, 2013e).

Consumers most prefer flavor delivered by the food's preparation or cooking style (e.g., grilling); just under two-thirds cite seasonings, dips, sauces, marinades, glazes, or spices (Technomic, 2013e).

Among fresh/dried herbs, consumers are most interested in basil, chives, rosemary, cilantro, and tarragon; about one-third look for lemongrass, ginger, cumin, and curry powder; one-quarter seek out wasabi, coriander, horseradish, or sea salt (Mintel, 2012b).

Barbecue sauces are now infused with alcohol, fruit, salsa, and coffee. Mustards are upgraded with champagne, herbs, key limes, and apples, and salsa benefits from the addition of seeds, fruit, tequila, and hotter-than-ever peppers (Mintel, 2012c).

In addition to the big three (Italian, Mexican, and Chinese), 75% of consumers consider Japanese cuisine/sushi to be an everyday/mainstream ethnic flavor, and about six in 10 cite Cajun, Greek, French, Thai, and Indian. In addition, more than half characterize Tex-Mex, Spanish, and German as everyday/mainstream (Technomic, 2012d). Second-tier ethnic cuisines include Cuban, Caribbean, Korean, Szechuan, and Vietnamese (Technomic, 2012d).

Looking farther out, about half of specialty food retailers cite Mediterranean as the top emerging ethnic cuisine in 2013; other cuisines cited include Latin other than Mexican, Indian, Thai, Vietnamese, and Eastern European (Tanner, 2013b).

Fortified and Functional

Real/100% real was the top claim on the best-selling new better-for-you foods/beverages in 2012, followed by good source of vitamins/minerals, less calories/sugar, more natural/organic, a good source of protein, and high fiber/whole grain (IRI, 2013a).

Fiber/whole grains top the list of nutritional ingredients, with 62% of adults trying to include them in their diet, followed by protein, calcium, omega-3s, potassium, and probiotics.

And what about ingredients to avoid? Sodium/salt and sugars in general led the list, each cited by 58% of consumers, followed by high fructose corn syrup cited by 51%, *trans* fat 49%, saturated fats 48%, and monosodium glutamate 37% (IFIC, 2013; Figure 3).

Nearly nine in 10 consumers regularly consume fortified foods. Bread, cheese, cold cereal, pasta, peanut butter, and yogurt top the list (MSI, 2012c). Bioavailability is now a powerful mass market differentiator (Sloan, 2013).

In 2012, for the first time, consumers ranked specialty nutritionals ahead of minerals on the list of ingredients for which they are seeking to increase intake. Vitamins remained No. 1 on the list (MSI, 2012c). Choline, magnesium, potassium, hydroxytyrosol, astaxanthin, cocoa flavanols, curcumin, and prebiotics are among the next wave of important nutritional ingredients (Sloan, 2013).

More than two-thirds of moms say they are making a strong effort (20%) or some effort (49%) to buy fortified foods for their children. One-third of moms are making a strong effort to include whole grains, vitamins/minerals, calcium, protein, vitamin D, vitamin C, dietary fiber, and omega-3s/fish oil. One in five moms is making a strong effort to include more probiotics/prebiotics (MSI, 2012c).

Among health conditions, after weight management/weight loss, heart health has the biggest influence on food/beverage purchases. Also on the list of consumer concerns are avoiding empty calories, preventing cancer, energy, digestive health, mind health, building bone density, and building physical strength (FMI, 2012). Functional food and beverage sales topped $44 billion in 2012, up 7%; functional beverages accounted for 63% of sales (NBJ, 2013).

Yogurt that carried specific claims for digestive health was the most purchased functional food in 2012. Also on the list of popular functional foods were cereal with heart health claims, cholesterol-lowering butter/margarine, orange juice to lower cholesterol, and shakes/bars to reduce hunger (MSI, 2012c).

About two-thirds of consumers say they very frequently/occasionally bought condition-specific foods in 2013; 33% did so for cholesterol-lowering purposes, 28% for weight control, 23% blood pressure, 20% digestive health, 16% heart/circulatory health, 14% diabetes, and 13% bone/joint concerns (Sprinkle, 2013).

Lastly, while the controversy over what is natural continues, one thing is certain: consumers have their own interpretation of the concept. HealthFocus (2013) reports that to consumers, natural means “free from,” and the majority link natural to what is left out of a product. New in 2013, genetically modified organisms topped the list of ingredients that consumers want left out of food products. **FT**

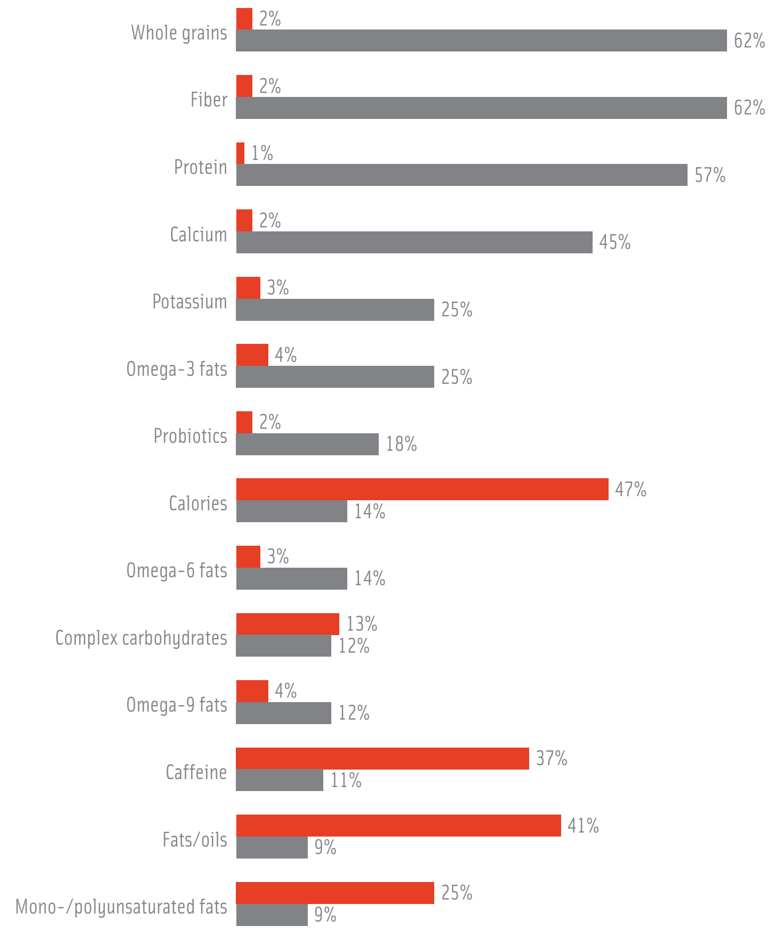


Figure 3. To what extent do you try to consume or avoid the following? From International Food Information Council Foundation, 2013

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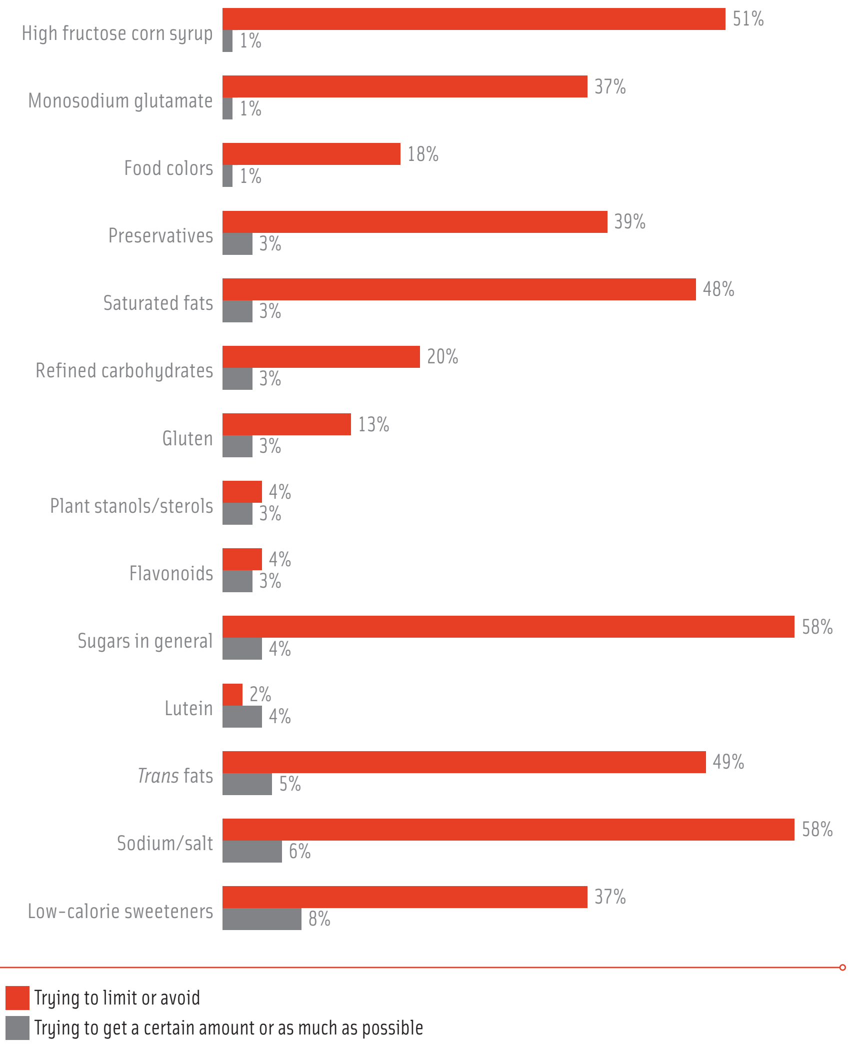

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