

THE FUTURE OF SPECIALISED NUTRITION: 2020

Global Annual Review: what's now and what's next for the specialised nutrition market.



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Report Content

- A look back, and a look ahead

THE BIG STORIES

- Mintel's perspective

IMF ingredients emphasise gut-brain health

- Resolving digestive problems and gut-brain axis dominate IMF patent activity
 - Graph 1: % share of infant formula patent (granted and pending) inventions by proposed therapeutic effect, Sep 2019
- Globally, prebiotics remain more prevalent than probiotics in IMF
 - Graph 2: percentage of baby formula (0–6 months) and baby formula (6–12 months) launches that contain select functional ingredients, by region, Sep 2014–Aug 2019
- Standout patents that aim to enhance infant brain and immune system development, as well as reduce cow's milk protein allergy risk

Transparency is growing in specialised nutrition

- Blockchain makes transparency for specialised nutrition a reality
- Traceability is developing quickly across specialised nutrition categories
- US VMS brands make the move to full transparency to support consumer trust

Plant-based, sustainable sports nutrition increases

- Research confirms and media attention drives awareness that plants can fuel sports performance
- Global plant-based performance nutrition launches show rise in launch activity
 - Graph 3: % performance nutrition launches with select claims, Dec 2014–Nov 2019
- Potatoes could be the next sustainable sports performance fuel

IN THE NEXT TWO YEARS

- Mintel's perspective

FSMPs begin to embrace a plastic-free positioning

- Healthcare's heavy reliance on plastic is its Achilles' heel; but that is changing
- An ageing world population means nutrition support from FSMPs will continue to grow
- Abbott and Nestlé are making the transition in sustainable FSMP race

Integrated infant and maternal nutrition emerges

- Infant formula patent activity will continue to increase to improve nutritional link between mother and baby
 - Graph 4: infant formula, number of patent families published each year (2009–Oct 2019)

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- New technology can make infant nutrition more personalised
- More proven infant probiotics and maternal microbiome tests will emerge

Personalised sports nutrition is the next phase

- "Office worker by day, extreme athlete by night" will drive personalisation within sports nutrition
- Protein will be one of the first nutrients to be personalised
- Personalisation is being lead by the VMS sector but sports nutrition could easily follow

IN FIVE YEARS AND BEYOND

- Mintel's perspective
- FSMPs will reduce their environmental impact
- Global FSMP brands set out their future environment conservation and sustainability plans
- Nutrition to protect against pollution will grow
- Lab cultured protein will relieve exposure to environmental pollutants
- Watch how detection of volatile organic compounds in our breath could detect serious diseases faster
- VOC testing could appear very soon in consumer devices
- Smart homes and virtual assistants will revolutionise specialised nutrition

KEY MARKET DATA

- Global infant formula launches by region
- Global infant formula launches, top claims
 - Graph 5: % infant and maternal nutrition* launches, by select claims, Dec 2018-Dec 2019
- Global infant formula launches, top companies
- Performance food and drink launches, by region
 - Graph 6: % performance food and drink launches, by region, Dec 2018-Dec 2019
- Performance food and drink launches, top claims
 - Graph 7: % performance food and drink launches, by claim, Dec 2018-Dec 2019
- Performance nutrition launches, top companies
- Weight management food, drink and healthcare launches, by region
 - Graph 8: % weight management nutrition food, drink and healthcare launches, by region, Dec 2018-Dec 2019
- Weight management food, drink and healthcare launches, top claims
 - Graph 9: % weight management nutrition food, drink and healthcare launches, by claim, Dec 2018-Dec 2019
- Weight management nutrition launches, top companies
- Foods for special medical purposes food, drink and healthcare launches, by region
 - Graph 10: % FSMPs food, drink and healthcare launches, by region, Dec 2018-Dec 2019
- Foods for special medical purposes food, drink and healthcare launches, top claims
 - Graph 11: % FSMPs food, drink and healthcare launches, by claim, Dec 2018-Dec 2019

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- FSMPs launches, top companies

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