Sweeteners in the Crosshairs: How Do Consumers Really Feel About Sweeteners and are These Feelings Changing?

By Tom Vierhile, Innovation Insights Director, GlobalData

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We also continually track FMCG innovation in over 50 markets to discover game-changing innovations and new product trends.
About GlobalData's primary consumer research

GlobalData's proprietary TrendSights framework interprets consumer trends through an organized "trend hierarchy"
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Consumers today are more "ingredient-aware"

A majority of consumers globally – 54% – say they are paying a high amount of attention to the ingredients in the foods or drinks they consume.

Growing interest in "cleaner" foods, rising worries about food allergies, and food contamination issues are making consumers more "ingredient-aware."

Source: GlobalData Q1 2017 consumer survey; Images from Shutterstock
Ingredient awareness spikes for kids' foods, drinks

Ingredient concerns tend to be much higher for food or drink products that are aimed at children than for products that are not age-specific.

Twice as many consumers globally say they pay a "very high amount of attention" to ingredients in children's food, than ingredients in their own food (42% versus 21%).

Source: GlobalData Q1 2017 consumer survey; Images from Shutterstock
Globally, concern is high for sugar and fat

<table>
<thead>
<tr>
<th></th>
<th>Global</th>
<th>US only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sugar</td>
<td>43%</td>
<td>42%</td>
</tr>
<tr>
<td>Fats</td>
<td>41%</td>
<td>42%</td>
</tr>
<tr>
<td>Calories</td>
<td>35%</td>
<td>46%</td>
</tr>
<tr>
<td>Carbohydrates</td>
<td>26%</td>
<td>33%</td>
</tr>
</tbody>
</table>

Source: GlobalData Q4 2016 consumer survey; Image from Shutterstock
A majority of consumers globally are keeping close tabs on sweetener consumption (especially sugar)

87% of consumers globally (86% in the US) are either actively trying to reduce consumption of sugar (43%) or are trying to consume sugar in moderation (44%).

Source: GlobalData Q4 2016 consumer survey; Image from Shutterstock
Sugar concern: top countries by world region

Chile is most eager to cut sugar; the US is just below the global average

Percentage of consumers "actively trying to reduce consumption of sugar"

Source: GlobalData Q4 2016 consumer survey
Concern about sugar tends to rise with age

Global: "What best describes your consumption of products containing sugar?" Response for "actively trying to reduce consumption," by age, 2016

- Women (of all ages) tend to be more concerned about sugar consumption than men, though concern levels by gender tend to converge with age.

Source: GlobalData Q4 2016 consumer survey
Consumers increasingly link sugar with weight gain

US: "What source of calories is the most likely to cause weight gain?", 2012–17

- **Sugars**: 20% in 2012 and 21% in 2013, reaching 32% in 2017.
- **Carbohydrates**: 19% in 2012 and 19% in 2013, remaining consistent at 20% in 2017.
- **Fats**: 18% in 2012, increasing to 16% in 2013, then 15% in 2014, 13% in 2015, 15% in 2016, and 20% in 2017.
- **Protein**: 1% in 2012, remaining consistent at 1% in subsequent years.
- **All sources the same**: 30% in 2012 and 30% in 2013, decreasing to 29% in 2014, 27% in 2015, 28% in 2016, and 20% in 2017.
- **Not sure**: 11% in 2012, increasing to 14% in 2013, then 15% in 2014, 11% in 2015, 13% in 2016, and 10% in 2017.

32% of Americans now say that sugars are the most likely calorie source to cause weight gain, a dramatic increase from 25% in 2016.

Source: International Food Information Council Foundation “2017 Food & Health Survey” (2017)
Obesity issues escalate as the US leads the pack

According to the latest data from the OECD, 19.5% of people aged 15 or over in OECD countries are obese.

The US is the most obese country in the world, with 38.2% of the adult population being obese.

The OECD sees "no clear sign of retrenchment" of the obesity epidemic.

Source: OECD "Obesity Update 2017" (2017)
Taxing consumers seems likely to change behavior

US: "What effect do you think a tax/price increase on unhealthy food/drinks would have on your purchase decision?", 2016

Responses for "would buy products less"/"would stop buying altogether"

Most negative on taxes? 25–34 year-old men. 85% would buy less or stop buying altogether.

18–24s
74%

25–34s
79%

35–54s
67%

55-plus
50%

Source: GlobalData Q4 2016 consumer survey.
Informing consumers may change behavior too

Panera Bread's new "sweet facts" cup puts sweetener content in a place it has never been before, on cups used for fountain soft drinks

- Panera Bread's new "Sweet Facts" cup lists the number of teaspoons of added sugar in its six new low-to no-sugar craft beverages, plus regular cola.

- Panera says 99% of Americans do not know the amount of added sugar in a serving of cola; 83% underestimate the amount.¹

- Since rolling out its craft drinks in March, Panera has seen an 8% shift from fountain soda to more lightly sweetened beverages.¹

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"Less bad for you" versus "good for you"

Consumers generally recognize that sweeteners are unlikely to have a positive impact on health.

Agave and stevia (outside of honey) are seen as most healthful; just over one third of consumers globally say each has a positive health impact.

Source: GlobalData Q1 2017 consumer survey; Images from Shutterstock
Views toward specific types of sweeteners are as varied as sweeteners themselves are.

Global and US: "Do you think the following will have a positive or negative impact on health?" Response for "negative," 2017

- Aspartame: 39% global, 31% US
- High-Fructose corn syrup/GFS*: 51% global, 26% US
- Xylitol: 21% global, 16% US
- Stevia: 13% global, 8% US
- Agave syrup/nectar: 6% global, 6% US
- Honey: 3% global, 3% US

_views toward artificial sweeteners like aspartame are now more negative globally than they are for sweeteners like high-fructose corn syrup (HFCS)._

Source: GlobalData Q1 2017 consumer survey; Images from Shutterstock; *GFS = "glucose-fructose syrup"
Where sweeteners come from matters

Sweeteners that are "natural" or are derived from nature are more likely to have a positive perception than sweeteners that are not.

This explains honey's health halo. 77% of consumers globally (63% of Americans) believe honey has a positive impact on health.

Source: GlobalData Q1 2017 consumer survey; Images from Shutterstock
But views toward honey and stevia are changing

Global and US: "Do you think the following ingredient will have a positive or negative impact on health?" Responses for "positive," 2017

- Honey cannot escape worries about chronic health issues like obesity or type 2 diabetes.
- The positive "buzz" around honey may be easing as a result of these concerns.

- Stevia is in the opposite position as honey. Worries about obesity and so on may be helping stevia.
- As consumers learn more about stevia (plant-based, calorie-free, versatile), views turn positive.

Source: GlobalData Q1 2017 consumer survey; GlobalData Q2 2015 consumer survey; Images from Shutterstock
Views toward aspartame are mixed

Global and US: "Do you think that aspartame will have a positive or negative impact on health?" Response for "negative," 2015 and 2017

- 2015: 29% (Global) 31% (US)
- 2017: 45% (Global) 39% (US)

Global consumers have become more negative about aspartame; Americans less negative.

American men and women do not see eye-to-eye on aspartame. Men's views have changed; women's have not.

US consumers may feel less negative as other sweeteners have grabbed the spotlight.

In 2017, just 23% of US men said aspartame would have a negative effect on health, versus 36% in 2015.

Source: GlobalData Q1 2017 consumer survey; GlobalData Q2 2015 consumer survey; Images from Shutterstock
Views toward high-fructose corn syrup change too

Global and US: "Do you think that HFCS* will have a positive or negative impact on health?" Response for "negative," 2015 and 2017

- Negativity toward HFCS has eased significantly in the last two years.
- Removing HFCS from food or drink products is no longer as newsworthy as it once was.
- There is a generation gap over HFCS. Negativity toward HFCS is down by half for 18–24 year olds.
- But Americans aged 45-plus have hardly changed their views on it at all.

Source: GlobalData Q1 2017 consumer survey; GlobalData Q2 2015 consumer survey; Image from Shutterstock; *High-fructose corn syrup/glucose-fructose syrup
Consumers are not ingredient experts, and are unfamiliar with some sweeteners

A surprisingly high percentage of consumers globally say they are not familiar with the following sweeteners:

- Xylitol: 45%
- Agave: 26%
- Monk fruit: 64%*
- Erythritol: 73%*

Source: GlobalData Q1 2017 consumer survey; *GlobalData Q2 2015 global survey; Images from Shutterstock
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There is little consensus around sweetener claims

Examining sweetener claims in the context of sugar, no single claim emerges as the most attractive to consumers.

Consumers perceive that eliminating sugar comes at a cost since sugar substitutes have their own issues.

Source: GlobalData Q1 2017 consumer survey. Images from Shutterstock
Global consumers see few differences between "no added sugar" and "low sugar" claims

Global: "How appealing do you find the following food and drink product claims?", 2016

- No added sugar
- Low sugar
- Zero sugar*

Very/somewhat appealing:
- No added sugar: 70%
- Low sugar: 72%
- Zero sugar: 58%

Neither appealing nor unappealing:
- No added sugar: 18%
- Low sugar: 19%
- Zero sugar: 25%

Somewhat unappealing/not appealing:
- No added sugar: 12%
- Low sugar: 10%
- Zero sugar: 18%

Source: GlobalData Q4 2016 consumer survey; *Question limited to non-alcoholic drink claims for "zero sugar"
Americans also see few differences between "no added sugar" and "low sugar" claims

US: "How appealing do you find the following food and drink product claims?", 2016

Source: GlobalData Q4 2016 consumer survey; *Question limited to non-alcoholic drink claims for "zero sugar"
Interest in sugar reduction claims skews young for Americans

US: "How appealing do you find the following food and drink product claims?" Response for "very appealing," 2016

✓ The claim "no added sugar" suggests a product offered in a more natural state, an appealing proposition for younger consumers.

Source: GlobalData Q4 2016 consumer survey; Image from Shutterstock; *Question limited to non-alcoholic drink claims for "zero sugar"
Unsweetened products are seen as more healthful, but lacking in taste appeal

Over two thirds of consumers globally believe that unsweetened food or drink products are healthier for them.

But a minority of consumers globally believe that unsweetened food or drink products taste better than sweetened versions.

Source: GlobalData Q4 2016 consumer survey. Images from Shutterstock.
The evolution of the clean label concept may cause more pain for artificial sweeteners going forward.

US: "What does the term 'clean label' mean to you? Select all that apply," top six responses shown, 2015 and 2017

- Free from artificial ingredients: 30% (2015), 38% (2017)
- Natural / organic claims: 29% (2015), 38% (2017)
- Do not know what "clean label" means: 45% (2015), 31% (2017)
- Minimally processed: 24% (2015), 27% (2017)
- Free from allergens: 22% (2015), 26% (2017)
- No pesticides/toxins: 25% (2015), 24% (2017)

✓ The "clean label" concept is coalescing around freedom from artificial ingredients, including artificial sweeteners. This shift will make life more difficult for any sweetener that is perceived to be "artificial."

Source: GlobalData Q4 2015 consumer survey; GlobalData Q1 2017 consumer survey.
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Mixed results for sweetener changes shows there may be no magic bullet for sweeteners

Replacing one artificial sweetener with another one backfired for PepsiCo's Diet Pepsi in 2015 as fans of the original aspartame-based formulation rebelled.

In Australia, Coca-Cola ran into resistance rolling out Coca-Cola No Sugar to replace Coca-Cola Zero (both with aspartame). Woolworths initially refused to stock it.¹

Source: [1] Sydney Morning Herald, "Woolworths Refusing to Stock Coca-Cola No Sugar," (July 2017); Images from PepsiCo, Coca-Cola
Ditching artificial sweeteners altogether catches on

Dannon's new Light & Fit Greek no-fat yogurt with zero artificial sweeteners makes a clean label pitch to consumers

- Light & Fit Zero is sweetened with stevia leaf extract and cane sugar. It has 90 calories per serving.
- Dannon says 39% of Millennials are switching from artificial sweeteners to no/low-calorie substitutes.¹

Source: [1] Business Newswire "Dannon Introduces New Choices in Light Yogurt – Minus The Artificial Sweeteners" (July 2017); Image from Dannon
Nestlé uses more milk and cocoa, and less sugar

In April 2017, Nestlé introduced a new KitKat chocolate bar in the UK with more milk and cocoa, and no front-of-pack mention of less sugar.

- As part of its plan to cut sugar use by 10% across its confectionery range in the UK and Ireland, Nestlé launched a new version of KitKat in April 2017.

- The recipe does not use Nestlé's new hollow sugar crystals. Instead, it uses 13% more cocoa, and 20% more milk.¹

- Sugar is reduced from 54g per 100g to 51g per 100g. The new bar contains 209 calories, versus 213 for the old bar.²

Using spicy or floral flavors to outflank sugar issues

**Skittles and Starburst Sweet Heat candies**

- Coming in December 2017, Skittles and Starburst Sweet Heat features fruity flavors with a spicy kick.¹
- Spicy flavors can potentially be used to help mask a reduction of sugar.

**Lifeway Strained blueberry and lavender kefir cup**

- Kefir Cup has the thick, creamy texture of Greek yogurt with up to twice as many probiotics.²
- Sugar content for this flavor is just four grams per cup.

Sugar reduction efforts now include staples

Heinz's new ketchup with 50% less sugar and salt shows that staples like condiments are a new target for sugar reduction

- Foods like condiments can be a "stealthy" source of sugar.
- New in France, Heinz tomato ketchup with 50% less sugar and salt acknowledges that.
- Britain's National Health Service lists savory food like ketchup as one of six food types that are the top sources of added sugar.¹

Source: [1] NHS, "Top Sources of Added Sugar in Our Diet" (February 2016); Image from Heinz Ketchup
Top added sugar sources loom as reduction targets

The UK's National Health Service has quantified sources of added sugar, citing the six foods below as top sources of added sugar in the UK diet. This provides a roadmap for reformulation.

UK: sources of daily intake of added sugar (%), 2017¹

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table sugar, candy, jams</td>
<td>27%</td>
</tr>
<tr>
<td>Non-alcoholic drinks</td>
<td>25%</td>
</tr>
<tr>
<td>Biscuits, buns, cakes</td>
<td>20%</td>
</tr>
<tr>
<td>Alcoholic drinks</td>
<td>11%</td>
</tr>
<tr>
<td>Dairy products</td>
<td>6%</td>
</tr>
<tr>
<td>Savoury food (sauces, ready meals, chips, etc.)</td>
<td>5%</td>
</tr>
</tbody>
</table>

Sugar reduction tends to focus on soft drinks and confectionery. Many other categories offer reduction opportunities.

Source: [1] NHS, "Top Sources of Added Sugar in Our Diet" (February 2016); Images from Shutterstock
Sugar reduction targets now include bread, wine

Nature's Own Life 100% whole grain sugar-free bread

Ingredients: whole wheat flour, water, wheat gluten, yeast, maltitol, contains 2% or less of each of the following: butter (made from milk), salt, cultured wheat flour, vinegar, monocalcium phosphate, enzymes, ascorbic acid, and soy lecithin.

One slice of bread has 50 calories, and zero grams of sugar.

Zero chardonnay wine

This 11% ABV chardonnay has a reduced sugar content because of the addition of specific yeast selected to ferment almost the entire sugar content.

The sugar content for Zero wine is just 1.3 grams per bottle. The average glass of Zero chardonnay has 85% less sugar than the average glass of dry chardonnay.¹

Source: Nature' Own; The Veeno Store; [1] Manchester Evening News, “Skinny Wine is Here With Less Sugar Than an Avocado - and it’s BOGOF in Manchester” (July 2017); Image from Nature's Own
Even meat is taking steps to avoid sugar

Applegate Naturals launches the first sugar-free bacon

✓ Hormel's Applegate Naturals launches a "no sugar" bacon for ingredient-conscious consumers.

✓ The company says 65% of American adults want to reduce or avoid sugar in the diet.¹

Source: [1] Star Tribune, "Applegate Launches First Sugar-Free Bacon" (August 2017); Image from PR Newswire
Sugar reduction can pay off, big time

Bai Brands credits sugar reduction as a key factor in its sales success and $1.7bn sale to Dr Pepper Snapple Group

"In 2010, we noticed how consumers were turning bottles to see how much sugar was inside of them. You'd win or lose on that basis, and I saw it coming – a growing unwillingness in consumers to drink sugar. This is the issue that has fueled our growth."¹

- Ben Weiss, founder, Bai Brands

Source: [1] Inc. Magazine, "How Low Sugar Took Me to a Sweet $1.7 Billion Sale" (July/August 2017); Images from DrinkBai
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Re-engineering sugar to be less caloric has promise

Nestlé re-engineers sugar to cut calories and spur innovation

Regular sugar crystals

"This truly groundbreaking research is inspired by nature and has the potential to reduce total sugar by up to 40% in our confectionery."  

Stefan Catsicas, Nestlé chief technology officer

Nestlé's sugar crystals

✓ Nestlé has developed a new process that takes sugar and changes its physical structure. New hollow sugar crystals are said to dissolve faster and deliver identical sweetness as regular sugar, with fewer calories.  

So-called "rare sugar" could also shake things up

Rare sugar is only available in small quantities in nature and includes several types of sugar like D-allose, D-psicose, and xylitol. Commercial versions of rare sugar can have about 70% of the sweetness of sugar, with almost none of the calories.¹

Rare sugar was developed in Japan. Coca-Cola Systems' Yogur Stand rare sugar drinking yogurt smoothie is a recent example of rare sugar innovation.

Source: [1] Matsutani, "Functional Products – Rare Sugar Sweet (glucose syrup containing rare sugars)," (accessed October 2017); Image from Matsutani
Growing awareness of FODMAPs and the low FODMAP diet could hurt some sugar substitutes

**at a glance: FODMAPs and the low FODMAP diet**

FODMAPs are specific types of carbohydrates that can be poorly absorbed and cause digestive discomfort in some people. FODMAPs are found in a wide variety of food groups.

<table>
<thead>
<tr>
<th>Fermentable</th>
<th>Examples of High FODMAP Foods and Ingredients</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oligosaccharides</td>
<td>Fructans/GOS: wheat, rye, onions, garlic, artichokes, inulin, baked beans, red kidney beans, cashews</td>
</tr>
<tr>
<td>Disaccharides</td>
<td>Lactose: milk, yogurt, ice cream, pudding, custard</td>
</tr>
<tr>
<td>Monosaccharides</td>
<td>Excess Fructose: high fructose corn syrup, honey, agave, mango, watermelon</td>
</tr>
<tr>
<td>Polyols</td>
<td>Sorbitol/Mannitol: sugar-free products, blackberries, apples, pears, peaches, cauliflower, mushrooms, snow peas</td>
</tr>
</tbody>
</table>

Nestlé's launch of ProNourish could kick-start the FODMAP issue.

Source: ProNourish; Images from ProNourish
Low GI "natural" sugar could be a big deal

So-called "natural" sugar – as unrefined as possible, so it has a lower glycemic index (GI) – could drive future new product innovation.

Researchers at Australia's Monash University – which put FODMAPs on the map – think that low GI "natural" sugar could help lower type 2 diabetes risk.

The body treats unrefined sugar differently than refined sugar. The natural trace elements in unrefined sugar interfere with the transport mechanisms for moving sugar through the stomach, slowing the body's blood glucose response.¹

Refining sugar removes trace minerals that impact how sugar is digested by the body.

<table>
<thead>
<tr>
<th>Component (incl. trace minerals)</th>
<th>Low GI naturally milled sugar</th>
<th>White refined sugar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sucrose</td>
<td>98.8–99.2%</td>
<td>99.6–99.7%</td>
</tr>
<tr>
<td>Antioxidants</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Potassium</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Calcium</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Magnesium</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

Refined sugar is digested more quickly by the body, triggering inflammation.

Source: [1] Dr. David Kannar, associate professor at the School of Clinical Studies of Monash University, speaking at ConTech 2017, “Sugar: Cause or Cure?” (May 2017)
Artificial sweeteners may be in for a rough ride

A growing body of research suggests that artificial sweeteners adversely affect gut microbiota, causing health issues

✓ A new study published in the Canadian Medical Journal found that non-nutritive sweeteners were associated with weight gain, type 2 diabetes, and other health issues.

✓ The University of Manitoba study found a 14% higher risk of type 2 diabetes for those who consumed the most non-nutritive sweeteners versus those that consumed the least.

Researchers believe that non-nutritive sweeteners may alter gut microbiota, which can cause changes in metabolism.
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Tom Vierhile – Innovation Insights Director

Tom has over 20 years of experience in fast-moving consumer goods reporting and analysis, much of that with the Product Launch Analytics database of new products. Based in Fairport, New York, he is an internationally recognized expert on new product marketing and is quoted in media outlets like USA Today, The Wall Street Journal, BBC News, Supermarket News, and NPR.

His experience with GlobalData includes continuing contributions to the ForeSights report series, which aims to identify potential game-changing emerging trends in the fast-moving consumer goods industry. The annual 10 Trends in Fast-Moving Consumer Goods webinar is one of Tom's key contributions. Some of Tom's favorite activities include scanning store shelves for new products as well as attending industry trade shows to collect new products, spot emerging trends, actually consume new products, and interview current and future movers and shakers within the industry.

Tom has authored many articles on new products for a variety of publications, has given presentations on new product trends at various industry conferences in the US, Europe, and South America, and is a regular contributor to Prepared Foods magazine, Natural Products Insider, and Just-Drinks.

Tom has a bachelor's degree in marketing from St. Bonaventure University and an MBA from the State University of New York at Buffalo.
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