



1st Edition

Clean Label in Food & Beverages:

Perception vs. Reality

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Base Year: 2019

Regional Coverage: United States

An increasing number of consumers opt for food and beverage products that they perceive to be “clean” or “natural.” Gluten-free, non-GMO, no artificial colors, organic, grass-fed, and preservative-free are claims consumers pay attention to in their quest for cleaner, greener living. However, what does “clean” mean to consumers? And what labeling do they look at when perusing products? This report will focus on providing a value chain analysis of the clean label food and beverages that includes a market overview, consumer perception survey, retailer initiatives, category offerings and ingredient analysis.

This Report Will Help Subscribers Address the Following Questions:

- What are the key trends and developments in “clean” food and beverage products?
- What is the consumer perception of “clean” products?
- What labeling is most appealing to consumers in different product categories?
- How clean are the products that claim the exclusion of specific ingredients?
- What initiatives are key retailers taking to attract consumers looking for “clean” products?
- What are the market opportunities throughout the value chain, from ingredients to consumers?

Featuring a Consumer Perception Survey



Report Contents

Introduction

Market Overview

- Market analysis and segmentation
- Key trends and developments
- Value chain analysis
- Future outlook

Consumer Perception Survey

Consumer perceptions and definitions of clean label and associated concepts such as organic and GMO-free

- Importance of buying “clean” and “natural” food and beverage products
- Overall level of trust in “natural” or “clean” labels
- Perception of “clean” and what it means to consumers
- Purchases of “natural,” organic, or “clean” within categories in Table 1
- Brand awareness
- “Clean” label importance to overall category (categories highlighted in Table 1)

Retailer Initiatives

Key initiatives by select retailers

- Standards and requirements
- Offerings
- Private-label offerings

Category Offerings

For key categories listed in Table 1, the following information will be provided:

- Clean label importance to overall category
- Labels and claims
 - Key and rising claims (see Table 3)
 - Commonly omitted ingredients
 - Promoted end benefits
 - Sourcing and sustainability

Ingredient Analysis

- Analysis of ingredients used within categories
- Rating of key ingredients and their clean label/organic/GMO-free alternatives
- Brand offerings and ratings

Table 1: Retailers analyzed

Kroger
Target
Trader Joe's
Wegmans
Whole Foods

Table 2: Product Categories

Baby food
Cereal
Cold beverages (i.e. juices)
Cultured meats (cold cuts and sausages)
Dairy (milk, cheese, yogurt, eggs)
Hot beverages (coffee and tea)
Meat and poultry
Meat replacement products
Packaged bread and other baked goods
Plant-based milk products
Ready-to-eat meals
Sweet and savory snacks

Table 3: Key Labeling Examples

Gluten-free
Non-GMO
No artificial colors
No artificial flavors
No artificial sweeteners
Organic
Preservative-free
Vegan





Scope

Clean Label in Food and Beverages: Perception vs. Reality Report will be an analysis of the market for products that are perceived as “clean” or “natural” in the United States. The report will analyze how important “clean” and “natural” is for consumers and their perception of what “clean” and “natural” is in the food and beverages category. The categories covered are:

- Baby food
- Cereal
- Cold beverages (juices)
- Cultured meats (cold cuts and sausages)
- Dairy (milk, cheese, yoghurt, eggs)
- Hot beverages (coffee and tea)
- Meat and poultry
- Meat replacement products
- Packaged bread and other baked goods
- Plant-based milk products
- Ready-to-eat meals
- Sweet and savory snacks

Key Benefits

This report will help identify business opportunities by analyzing the dynamics of the market. It will also:

- Provide an understanding of the market and the growing movement in food and beverages toward “clean”
- Offer an understanding of the consumer and the perception of what “clean” means
- Rate key suppliers of “clean” and natural products in the market based on the ingredient list
- Evaluate retailer initiatives toward more sustainable products
- Assess market opportunities throughout the value chain, from ingredients to consumers



Methodology

Kline's approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 60-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

Primary Research

We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline's analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Marketers/manufacturers
- Distributors
- Government agencies
- Retailers
- Suppliers
- Trade organizations

Secondary Research

We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline's internal database, consisting of over half a century's syndicated research.

Comprehensive Market Intelligence

We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline's proven methodology allows exceptionally effective, precise, and reliable market

intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for more than 60 years.

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