

PLATAFORMA
DE VALORIZAÇÃO,
INDUSTRIALIZAÇÃO
E INOVAÇÃO
AGROALIMENTAR



**PORTUGAL
FOODS**

Atlantic meets Mediterranean

Clean Label Food & Drink products in Europe

T: (+351) 220 966 021
geral@portugalfoods.org
www.portugalfoods.org

**Knowledge Division
2023**



New Product Development of Clean Label products



PORTUGAL
FOODS

Atlantic meets Mediterranean

Date Published matches January 2020 to December 2022

Category matches Food & Drink

Market matches Europe

Product positioning matches Clean Label (simultaneous use of at least 2 of the following positionings: GMO Free, Natural, No Additives/Preservatives, Organic)

7 676 products found

Positioning Definitions



GMO Free

Includes all products which claim to be GMO (genetically modified organisms) free. Typical claims include: GMO free, no-GMO, free of genetically modified, non-genetically modified, free of gm ingredients, without GMO, etc.

Natural

Includes all products which claim to be natural or made from natural ingredients, 100% natural (naturally smoked, natural color or flavor are not included).

No Additives/Preservatives

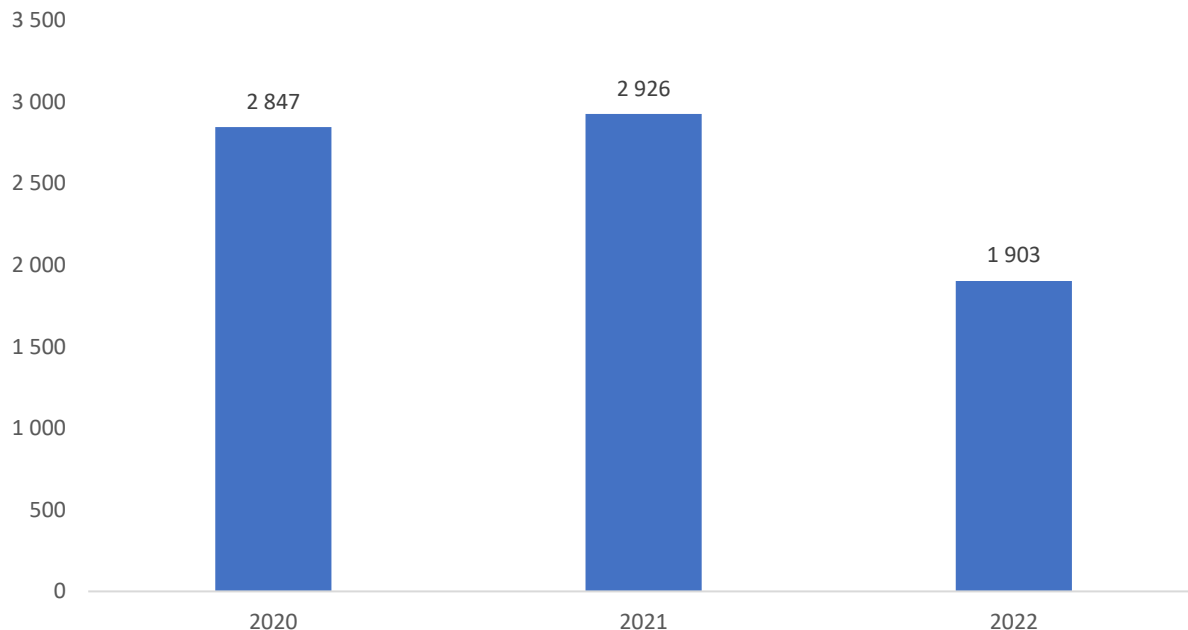
Includes all products which claim to be free from additives or/and preservatives. Includes products which claim to be free of added colors, MSG, flavors, additives, dyes, etc.

Organic

Includes all products which claim to be organic, organically grown or biodynamic. The non-English translation for organic can be referred to as Bio. If a singular ingredient is claiming to be organic and there is a clear claim being made - the position is assigned. Organic claims in the ingredient field with no reflection of a clear claim will not be assigned the positioning.



Clean Label product launches, by Year, in Europe, 2020 - 2022



From 2021 to 2022, Food & Drink product launches with Clean Label positioning registered a decrease of 35%.

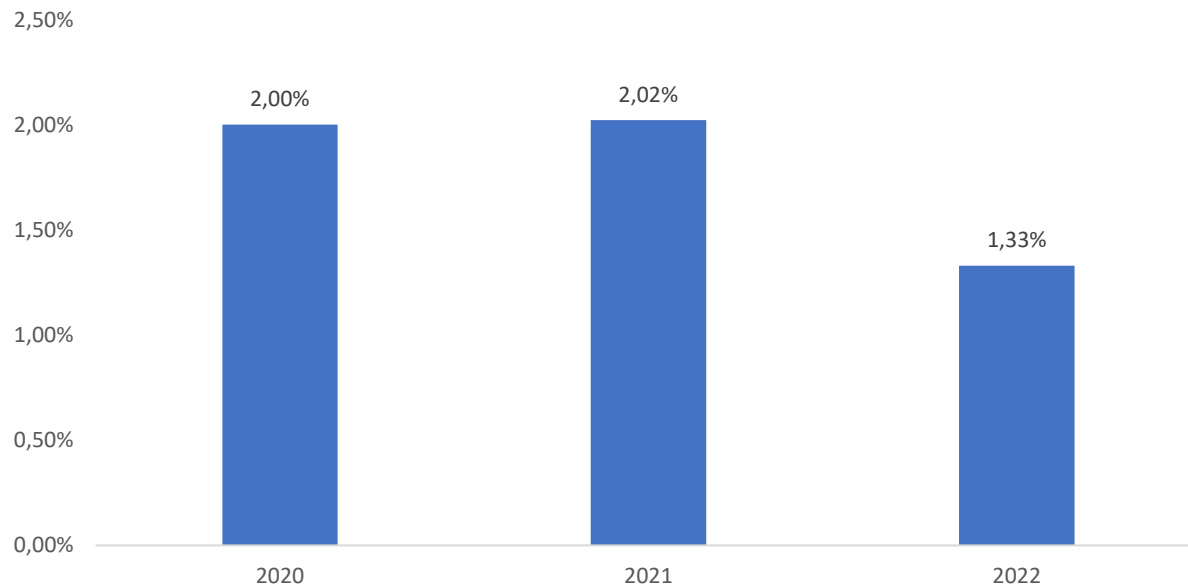
Date Published - Percentage of Food & Drink



**PORTUGAL
FOODS**

Atlantic meets Mediterranean

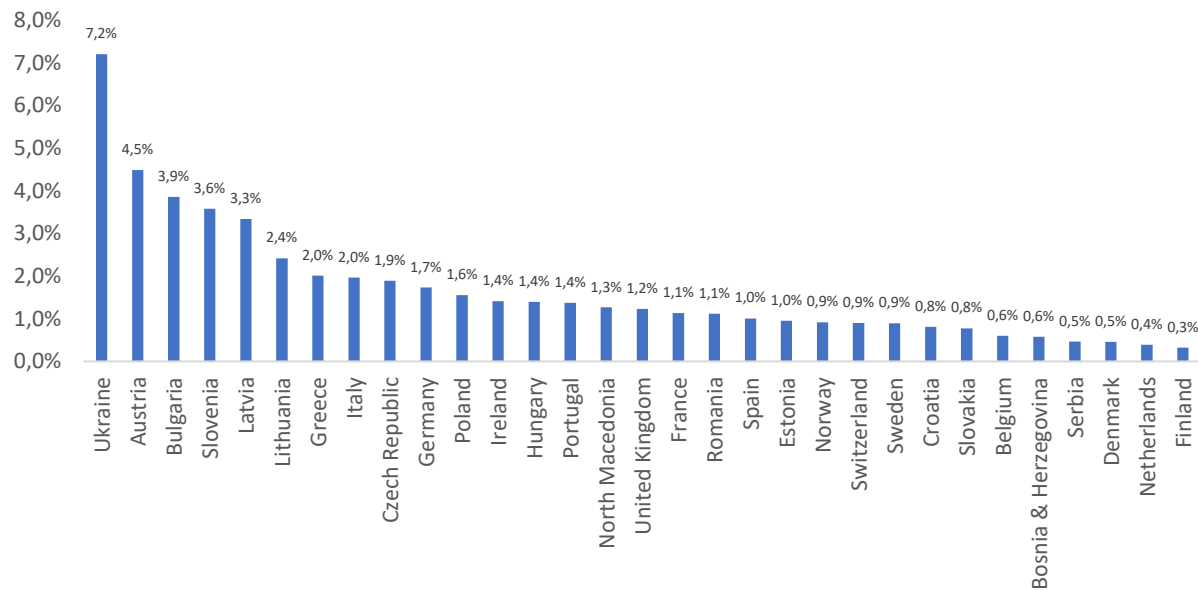
Percentage of Clean Label product launches, by Year, in Europe,
2020 - 2022



In 2022, a little over 1% of all Food & Drink products launched to the retail market featured the Clean Label positioning. In previous years, this percentage was around 2%.



Percentage of Clean Label product launches, by Country, in Europe, 2020 - 2022



In the last three complete years, the most active market in terms of Clean Label product launches was Ukraine, where 7,2% of all Food & Drink product launches featured the positioning.

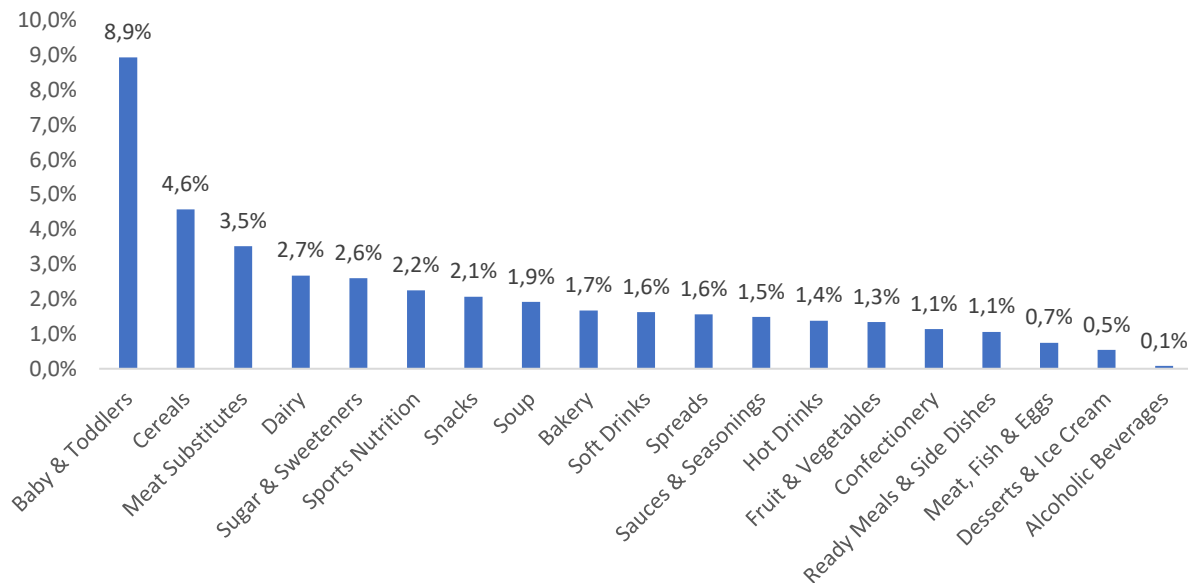
Product Categories



PORTUGAL
FOODS

Atlantic meets Mediterranean

Percentage of Clean Label product launches, by Category, in Europe, 2020 - 2022



Almost 9% of the products launched in the Baby & Toddlers category were Clean Label. The Cereals and Meat Substitutes categories registered percentages of 4,6% and 3,5%, respectively.

Product Examples - Baby & Toddlers



PORTUGAL
FOODS

Atlantic meets Mediterranean



Strawberry and apple puree for babies from 5 months onwards. Natural and GMO Free. (Ukraine)



Instant organic porridge with delicate organic wholegrain flakes, banana and raspberry, for babies from 8 months. Organic and GMO Free. (Austria)



Garden vegetables with organic turkey for toddlers from 1 year. Organic and GMO Free. (Germany)

Product Examples - Cereals



PORTUGAL
FOODS

Atlantic meets Mediterranean



Organic ginger and lemon tempeh bar. Organic and GMO Free. (Portugal)



Oatmeal with apple, cinnamon and chia. Organic, GMO Free and No Additives/Preservatives. (Poland)



Granola with a perfect mix of nuts, oats and seeds together with cocoa and coconut chips. No Additives/Preservatives, Natural and GMO Free. (Spain)

Product Examples - Meat Substitutes



**PORTUGAL
FOODS**

Atlantic meets Mediterranean



Two plant based burgers in a plastic standard tray. No Additives/Preservatives and GMO Free. (Latvia)



Grilled organic tofu in a 200g plastic vacuum pouch. Organic and GMO Free. (Bulgaria)



Barbecue flavored shredded plant-based meat alternative with pea, sunflower and oats. Natural, No Additives/Preservatives and GMO Free. (France)

Consumer Research



**PORTUGAL
FOODS**

Atlantic meets Mediterranean

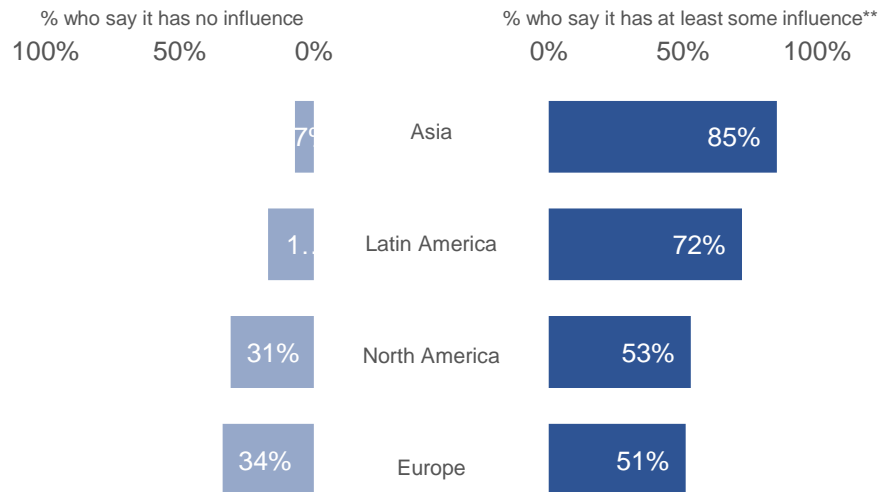
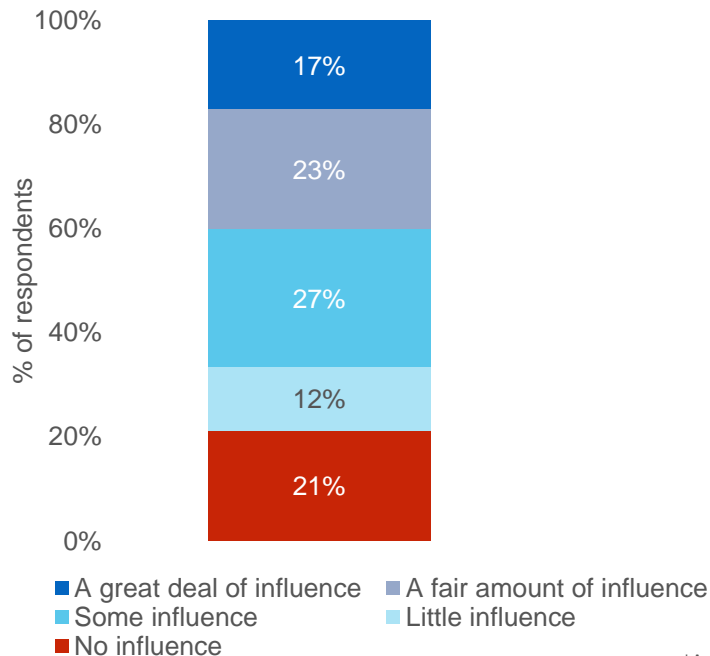
Clean labels have at least some influence on more than 2 in 3 consumers



**PORTUGAL
FOODS**

Atlantic meets Mediterranean

How much influence does clean label have on your buying decisions? (Average: 11 countries*) (2022)



Asians are most likely to be influenced by clean labels, with Europeans showing least demand for them. However, even in Europe, it is still the case that more than half say that clean labels have at least some influence

*Asia = China, India, Indonesia; Latin America = Brazil, Mexico; North America = Canada, US; Europe = France, Germany, Spain, UK **Combined responses of "some influence", "a fair amount of influence" or "a great deal of influence"

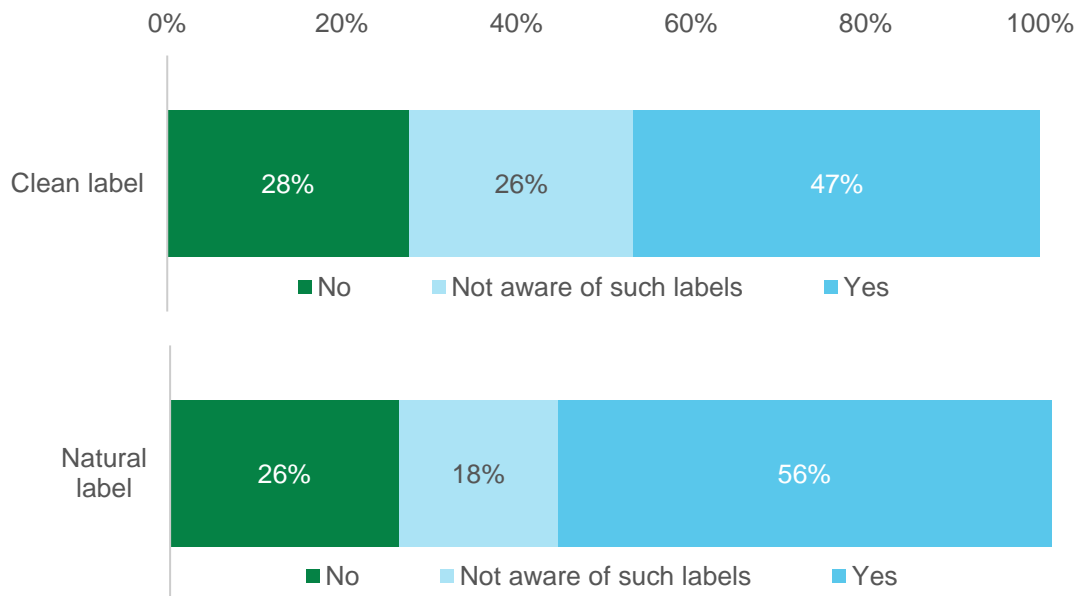
Almost half of consumers would pay more for clean labels



**PORTUGAL
FOODS**

Atlantic meets Mediterranean

Are you willing to pay more for food and beverage products with the following types of labels? (Average: 11 countries*) (2022)



	Clean	Natural
Asia	65%	77%
Latin America	56%	65%
North America	32%	36%
Europe	29%	39%

Asians were more likely than any other regional population to pay extra for clean and natural labels

*Asia = China, India, Indonesia; Latin America = Brazil, Mexico; North America = Canada, US; Europe = France, Germany, Spain, UK

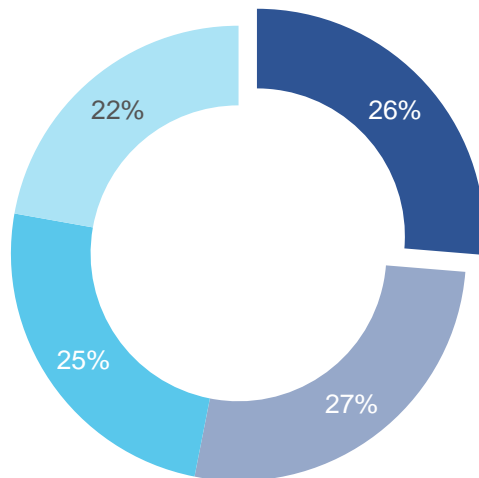
More than 1 in 4 looks to clean labeling as a primary route to health



PORTUGAL
FOODS

Atlantic meets Mediterranean

How would you categorize your predominant approach to healthy eating?
(Average: 11 countries) (2022)



- I choose natural products to avoid additives and preservatives as much as possible
- I choose products that positively boost my nutrition or benefit how my body functions (e.g., high in protein)
- I try to limit or reduce products/ingredients that are bad for me (e.g., high in fat, sugar, salt)
- I choose natural foods for their inherent nutrition (e.g., fruit, vegetables, nuts)



More than

1 in 4

consumers globally tackle healthy eating by avoiding additives and preservatives as much as possible, so clean labels are a core health demand for a significant section of the world's population.



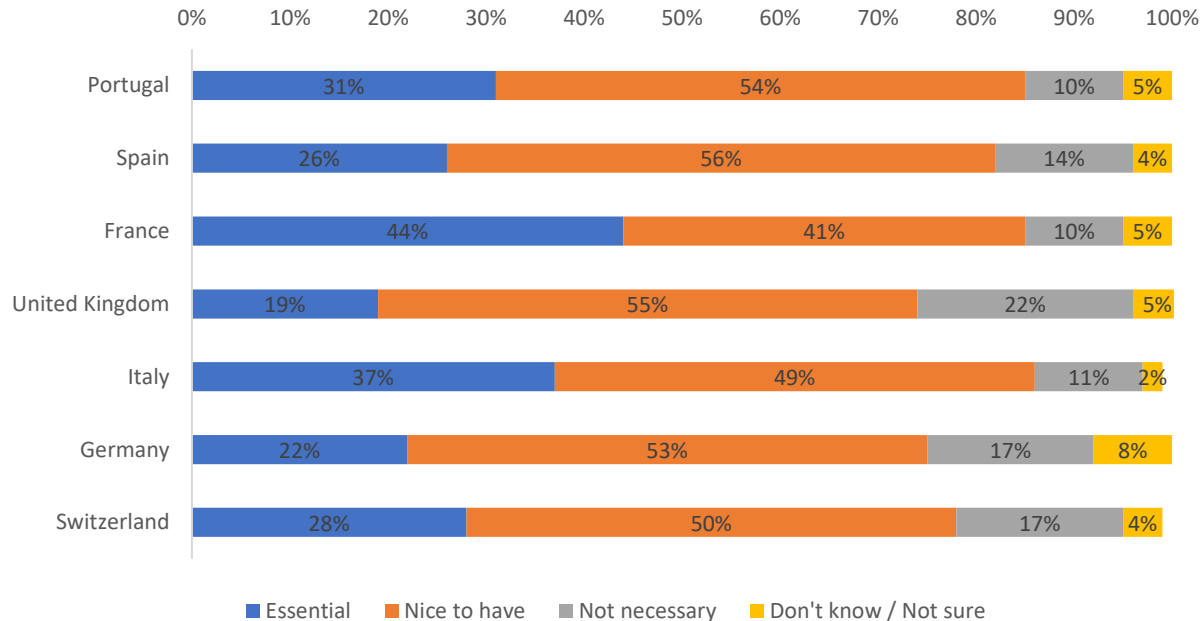
Consumer Data - Most desired feature of products



**PORTUGAL
FOODS**

Atlantic meets Mediterranean

Natural



The French and Italian respondents stand out as the consumers that value a natural product the most. On the other hand, 22% of the United Kingdom consumers said it was an unnecessary feature in a product.

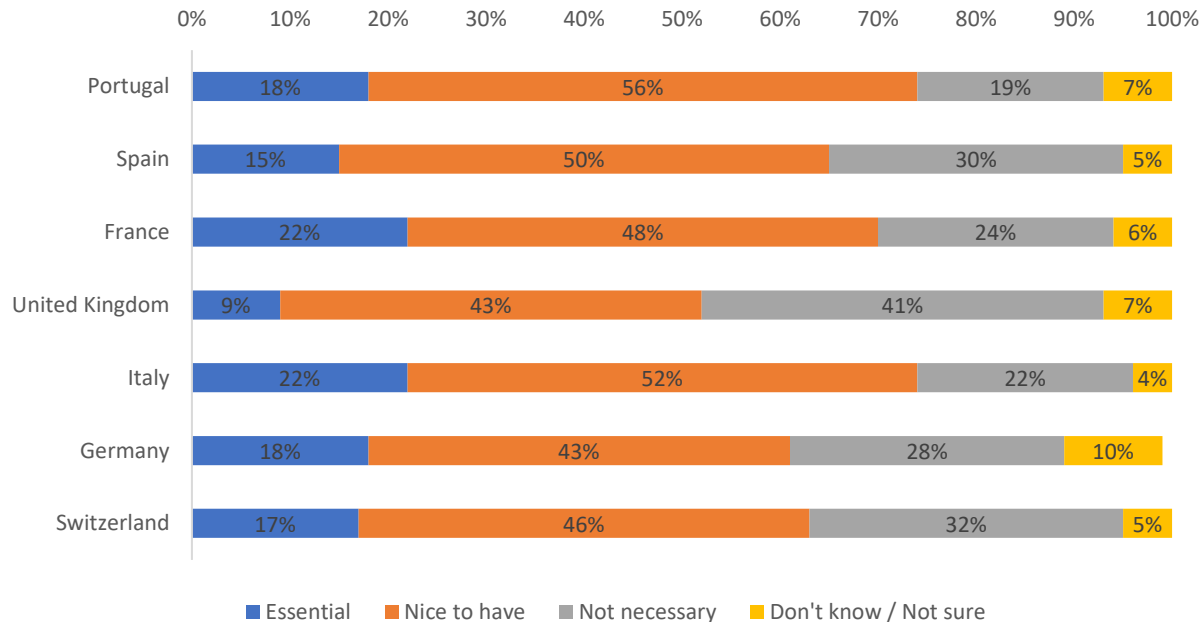
Consumer Data - Most desired feature of products



**PORTUGAL
FOODS**

Atlantic meets Mediterranean

Organic



When it comes to organic certification, 41% of consumers in the United Kingdom feel that it is not a necessary feature in a product.



**PORTUGAL
FOODS**

Atlantic meets Mediterranean

Para qualquer questão e/ou feedback, por favor contactar knowledge.division@portugalfoods.org

www.portugalfoods.org



PORTUGALFOODS



PORTUGALFOODS