Trends for senior food products
AGENDA

- The world’s demographic milestone
- Dietary and nutritional considerations for seniors
- Marketing and Messaging to the silver generation
The world’s aging population will bring new opportunities

Percentage of population aged 65 and above, by country, 2015

By 2020, the number of people in the world aged 60 years and older will outnumber children younger than 5 years.

Source: worldbank.org
Asia Pacific at the forefront of aging

• Nearly two-thirds of the world’s older people – close to 1.3 billion – will be living in Asia-Pacific.

• In North-east and East Asia, this proportion will be more than one in three people.

• Women currently constitute the majority – some 54% – of the older demographic in Asia-Pacific.
In China, health is the top priority

China: Activities on which over-55s like to spend more time, December 2016

- Maintaining health (a): 49%
- Entertainment (b): 46%
- Socialising with my friends: 42%
- Sleeping/resting: 36%
- Taking care of my (grand)children: 35%
- Travelling: 28%
- Going shopping (c): 21%
- Improving my look (d): 18%
- Attending cultural activities (e): 17%
- Planning my children's future (f): 14%
- Learning new skills/hobbies (g): 13%
- Managing and increasing wealth (h): 11%
- None of the above: 4%

Note:

a: eg doing exercise, watching health TV program
b: eg watching TV, play cards/mahjong
c: including online and in store
d: eg doing hair, buying new garments
e: eg art exhibitions, concerts
f: eg arranging blind dates, purchasing or looking for apartments
g: eg languages, musical instruments, computer
h: eg doing a part-time job, buying stocks
In ‘Greynnaisance’ society, age is just a number!

Hidekichi Miyazaki, 107y
Shizuoka, Japan

Dr. Frank Shearer, 101y
Lorna Linda, US

Helen “baddie” Winkle, 89y
Kentucky, US

Wang Deshun, 83y
Beijing, China
In China, physical pain is a key health indicator

China: Health issues, December 2016

<table>
<thead>
<tr>
<th>Health Issue</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poor eyesight</td>
<td>56%</td>
</tr>
<tr>
<td>Weak memory</td>
<td>53%</td>
</tr>
<tr>
<td>Chronic back/shoulder pain</td>
<td>44%</td>
</tr>
<tr>
<td>Insomnia/other sleep disorders</td>
<td>44%</td>
</tr>
<tr>
<td>Three &quot;highs&quot; (a)</td>
<td>42%</td>
</tr>
<tr>
<td>Poor immunity (b)</td>
<td>40%</td>
</tr>
<tr>
<td>Digestive problems (c)</td>
<td>36%</td>
</tr>
<tr>
<td>Osteoporosis</td>
<td>35%</td>
</tr>
<tr>
<td>Overweight</td>
<td>29%</td>
</tr>
<tr>
<td>Cardiovascular disease</td>
<td>26%</td>
</tr>
<tr>
<td>Diabetes</td>
<td>20%</td>
</tr>
<tr>
<td>Anxiety disorders/depression</td>
<td>18%</td>
</tr>
</tbody>
</table>

Note:
- a: eg high blood pressure, high blood sugar, high cholesterol
- b: eg prone to cold
- c: eg stomach ache, indigestion

Base: 800 seniors aged 55-74
Source: KuRunData/Mintel
A good eating habit is of great importance to seniors

China: Ways to achieve a healthy diet, December 2016

- Eating more seasonal foods (a) 66%
- Eating three meals regularly 57%
- Cooking with less oil 56%
- Eating more coarse grain (b) and less refined grain 56%
- Eating slowly 43%
- Controlling food intake to 80% for one meal 43%
- Eating fewer genetically modified foods 40%
- Using fewer sauces and seasonings when cooking 38%
- Snacking less (c) 30%
- Eating a variety of food in a meal 29%
- Eating more white meat and less red meat 20%
- Being a vegetarian 17%
- None of the above 2%

Note:
- a: eg vegetables, rice of the year
- b: eg maize, sorghum
- c: eg cakes, chocolate

Base: 800 seniors aged 55-74
Source: KuRunData/Mintel
Asia Pacific dominates in senior product launches

Between May 2013 and April 2018, Asia Pacific is the leading region that launches senior food, drink, and healthcare products, globally.

Percentage of global food, drink and healthcare launches with a seniors claim, by region, March 2011 to February 2017

<table>
<thead>
<tr>
<th>Region</th>
<th>Total Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific</td>
<td>72%</td>
</tr>
<tr>
<td>Europe</td>
<td>17%</td>
</tr>
<tr>
<td>North America</td>
<td>6%</td>
</tr>
<tr>
<td>Latin America</td>
<td>4%</td>
</tr>
<tr>
<td>Middle East &amp; Africa</td>
<td>0.3%</td>
</tr>
</tbody>
</table>
Prepared meals and white milk are the most common sub-categories for senior products

Majority of the senior products in APAC are in prepared meal, white milk, and hot cereal, and vitamins and dietary supplement sub-categories.

Share of sub-categories in APAC food, drink and healthcare launches with a seniors claim, by region, May 2013 to April 2018

<table>
<thead>
<tr>
<th>Sub-category</th>
<th>Total Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepared Meals</td>
<td>29%</td>
</tr>
<tr>
<td>White Milk</td>
<td>18%</td>
</tr>
<tr>
<td>Hot Cereals</td>
<td>8%</td>
</tr>
<tr>
<td>Vitamins and Dietary Supplements</td>
<td>8%</td>
</tr>
<tr>
<td>Meal Replacements &amp; Other Drinks</td>
<td>7%</td>
</tr>
<tr>
<td>Instant Rice</td>
<td>6%</td>
</tr>
<tr>
<td>Malt &amp; Other Hot Beverages</td>
<td>5%</td>
</tr>
<tr>
<td>Wet Soup</td>
<td>3%</td>
</tr>
</tbody>
</table>
Functional claim leads in senior products

Global VS APAC: Claim category penetration of senior food, drink, and healthcare products, May 2013 – April 2018

Source: Mintel GNPD
## Top functional claims for senior products

**Global: Functional claim penetration of senior food, drink, and healthcare products, by region, May 2013 – April 2018**

<table>
<thead>
<tr>
<th>Claim</th>
<th>%</th>
<th>Asia Pacific</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other claim</td>
<td>34</td>
<td>Other claim</td>
<td>20</td>
</tr>
<tr>
<td>Bone Health</td>
<td>26</td>
<td>Bone Health</td>
<td>17</td>
</tr>
<tr>
<td>Immune System</td>
<td>12</td>
<td>Digestive Health</td>
<td>7</td>
</tr>
<tr>
<td>Brain &amp; Nervous System</td>
<td>10</td>
<td>Antioxidant</td>
<td>5</td>
</tr>
<tr>
<td>Digestive Health</td>
<td>9</td>
<td>Cardiovascular Health</td>
<td>3</td>
</tr>
</tbody>
</table>

*Note: ‘Other claim’ includes food, drink and healthcare products with functional benefits not covered by the other functional claims such as “nourishes the lungs” and rehydration are examples of this type of functional claim.*
Target senior women with bone health products

- Asian women are not getting enough of these nutrients, which increase their risk of osteoporosis and other diseases.

- Chinese elderly women aged 60 years or older have an average Vitamin D level of <30 nmol/L, presenting vitamin D deficiency compared to the recommended Vitamin D level is 50-74 nmol/L, according to The Asia Pacific Regional Audit of IOF.

- In China, 21% of females aged 55-74 have osteoporosis but not taking any measures.

The product contains whey protein; vitamin D, magnesium and zinc to help maintain strong and healthy bones; and collagen for joint health and flexible movement and is specially designed for adults from 51 years of age.

Contains 600mg calcium and 125 IU/IU vitamin D3 to replenish calcium and to aid in bones formation. It is said to help prevent osteoporosis, and is recommended to serve one to two tablets daily.

Source: Mintel GNPD, International Osteoporosis Foundation
Immunity health products for seniors have an untapped potential in China

IsoWhey Clinical Nutrition
Advanced 55+ Nutritional Support for Healthy Ageing with Fibre (Australia)

Contains **vitamin C, B6 and B12** which contribute to a normal immune system and energy.

Ozi Choice Seniors Milk Powder (China)

The milk is enriched with vitamins and minerals including: vitamin E for strong bones; vitamin D to boost vitality; **vitamin A for vision and immunity**; protein for healthy tissue repair; and added magnesium for mobility.

- With Asia’s elevated ageing population’s vulnerability to various diseases, there is an opportunity for manufacturers to tap seniors as their potential market.

- 40% of Chinese seniors aged 55-74 are aware of having poor immunity.

- only 6% of senior Chinese with poor immunity are taking health supplements for this and 21% are not taking any measure to improve their poor immunity.

Source: Mintel GNPD
Opportunities for products that help seniors to stay active

The World Health Organisation recommends, for adults age 65+:

At least **150 minutes of moderate-intensity aerobic activity** throughout the week.

or

At least **75 minutes of vigorous-intensity aerobic physical activity** throughout the week.

**Turmeric for arthritic pain**

The supplement may be beneficial for temporary relief of arthritic and osteoarthritic pain, by reducing joint inflammation and swelling, increasing joint mobility associated with arthritis. (New Zealand)

**Capsules for walking**

Formulated with black ginger extract, to maintain walking ability of the middle-aged and the elderly. (Japan)

Source: Mintel GNPD
90 years apart but they have very similar needs

- Smaller appetites
- Limited motor skills
- Taste and nutrition challenges
- Difficulties chewing and swallowing
From baby foods to senior foods

Kewpie Baby Food White Fish & Vegetable Stew (Japan)

Kewpie Baby Food Happy Recipe Creamy Codfish Gratin with Rice (Indonesia)

Kewpie Yasashii Kondate White Fish & Vegetable (Japan)
Japanese producers use a system that guides caregivers

- Japan’s Universal Design Food provides guidance for seniors and caregivers.
- Soft foods fall into one of four categories that rate the food based on hardness, stickiness and how easy it is to chew.

<table>
<thead>
<tr>
<th>Group 1</th>
<th>Group 2</th>
<th>Group 3</th>
<th>Group 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Able to chew easily</td>
<td>Able to smash with gums</td>
<td>Able to smash with tongue</td>
<td>Able to swallow without chewing</td>
</tr>
</tbody>
</table>

Source: Mintel GNPD
Demographic focus: NHS’ Meritene for healthy ageing

MERITENE® is a range of nutritional products designed to address the needs of older adults. Each MERITENE® formula consists of one or more nutrients such as dietary fiber, protein, vitamins and minerals.

Global: Percentage change of nutritional therapy* food, drink, and healthcare product launches, February 2011 – January 2018

<table>
<thead>
<tr>
<th>Claim</th>
<th>% change: Feb 2011 - Jan 2012 - Feb 2017 - Jan 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seniors (aged 55+)</td>
<td>585</td>
</tr>
<tr>
<td>Children (5-12)</td>
<td>-8</td>
</tr>
<tr>
<td>Babies &amp; Toddlers (0-4)</td>
<td>-35</td>
</tr>
</tbody>
</table>

*Nutritional therapy products include food, drink, and healthcare products with specialized nutrition (e.g. Foods for Medical Purposes, Specialised Nutrition – unspecified)
Source: https://www.nestlehealthscience.com/brands/meritene
Senior nutrition for sarcopenia

- Research shows that proper protein distribution also may help prevent age-related sarcopenia, the loss of muscle mass with age. To lower the risk, research suggests **25g to 30g of protein per meal** in older people.

**Nutricia FortiFit Vanilla Flavoured Dietary Food for Medical Purposes (Italy)**
Contains **21g of protein/serving**, sweeteners with essential amino acids, including **leucine**, that stimulate muscle protein synthesis and play a vital role in the reconstruction of the muscles.

**Maeil Dairies**, a Korean agro-industry giant has launched a research center dedicated to research and development projects focused on muscle loss resulting from aging.

Looking to branch out into businesses targeting senior customers, as low birth rates and an aging population are changing the country’s demographics.
Engay food: Textured modified food development for seniors in Japan

- Engay/Enge (嚥下) is Japanese for swallowing.
- Dysphagia is difficulty in swallowing or the accidental breathing in of food or liquid into the trachea.
- Problems caused by dysphagia:
  1. Less enjoyment of eating or drinking
  2. Poor nutrition and dehydration
  3. Risk of aspiration and risk of choking

Regular Food
Texture-modified-food
Minced Food
Pureed Food
NUTRI has developed food texturizer for dysphagia patients

NUTRI Instant Food & Liquid thickener

NUTRI food thickener for jelly & texture modified food

NUTRI food thickener for Rice porridge jelly & texture modified food

3g=0.1oz
World’s awareness on ageing through initiatives and programs
Anlene repositions brand to be less for silver generation

- Traditionally Anlene's proposition has been around **mobility** and **prevention of bone health**.

- **Heart Max** targeted towards maintaining heart health is about growing young together – communicating the message that life should be lived in full
THRIVE for better nutrition strategy for seniors

Thrive Ice Cream and Gelato are ideal meal supplement, dessert, or snack to support nutritional strategies for healthcare patients and seniors.
Key takeaways for the future:

**Consumer & Medical needs**

- Seniors’ challenges: smaller appetite, taste and nutrition, limited motor skills, and difficulties in chewing and swallowing.
- Consider the key health and nutrition targets and issues for seniors.
- The opportunities for foods for medical purposes are likely to expand as populations continue to age.

- Senior consumers are health conscious, and want to preserve their good health for the future. Products that enable consumers to stay healthy, fit and active should prove attractive.

**Preventative**

- Seniors do not want to be categorised, but do have some age-specific dietary and nutritional interests and considerations. Food, drink and supplement manufacturers can innovate in these areas.
- To reach seniors effectively, empower them to go on living the life they love rather than selling cures for being old.

**“Ageless”**

Thanks! Get in touch

Michelle Teodoro
Food Science and Nutrition Analyst
mteodoro@mintel.com