

Market Intelligence Digest

Volume 1 Issue No. 23 - 24 | December 2019



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Export Marketing Bureau

G/F and 2/F DTI International Bldg.

375 Sen. Gil Puyat Avenue

Makati City 1200, Philippines

Tel. No.: (632) 465 3300

Fax No.: (632) 899 0111

<http://www.dti.gov.ph/exports/>

<http://tradelinephilippines.dti.gov.ph/>

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Ingredients to Watch in Asia Pacific in 2020

This covers five ingredient groups that Mintel is watching and why. They correspond to the emerging food and nutrition trends that appeal to APAC consumers.

Mintel Recommends:

✓ Take a holistic approach to health

Mental and physical health are becoming equally as important. Brands should focus on solutions to help consumers relax, meet their stress relief goals, and optimize their mental performance.

✓ Go traditional and natural

Food and drink brands in APAC favor naturally sourced nutrients from ingredients with specific functionality. The use of ancient/traditional ingredients and techniques are shortcuts that help position products as having natural and holistic benefits.

✓ Validate with solid science

Brands of functional products should provide proof of efficacy and ingredient purity based on scientific research studies.

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❖ ADAPTOGENS AND NOOTROPICS FOR MENTAL HEALTH AND WELLBEING

In an increasingly hectic world, where consumers make inseparable links between mental states and performance, solutions that support people with focus, attention and even mood elevation are in demand. It is now time for companies and brands to offer consumers solutions supporting the multiple areas of mental health that have the potential to grow in an era where consumers are starting to prioritize self-care and holistic wellness. There are two groups of ingredients that are emerging to support consumers in their mental health and wellbeing:

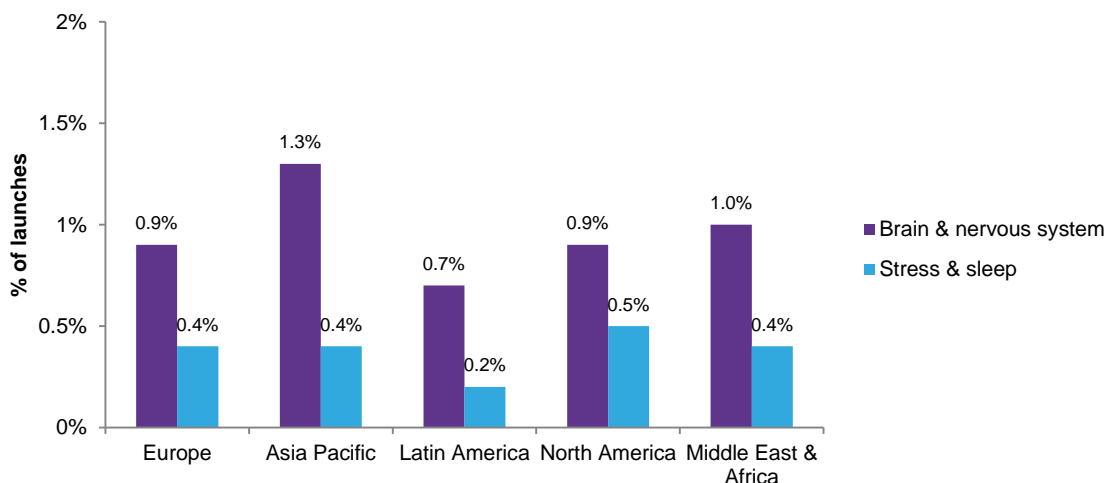
- Adaptogens which are said to focus on reducing physical, chemical and biological stress.
- Nootropics which aim to enhance brain health and performance.

Asians look at food, drink and supplements to support their mental health and wellbeing

Consumers are switched on to their own mental/emotional wellbeing and are looking for ways to support and build on this, as discussed in Mintel's Trend [Mood to Order](#).

Bring to Asia more products that support mental health and wellbeing

Global: new food, drink and healthcare products with mental health and wellbeing claims*, by region, Aug 2014-Jul 2019



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What is a nootropic?

Nootropic is taken from the Greek word 'noos' for intellectual awareness – also known as 'brain boosters' or 'smart drugs'. They are substances that improve cognitive functions like memory, focus, creativity or motivation. Caffeine is considered the most common nootropic. Other emerging nootropics are B vitamins, choline, L-theanine, MCT oils, omega-3s and ginkgo biloba.

Why they have potential

Consumers are taking an interest in their health and engaging in practices of self-betterment (ie wearing fitness trackers).

Nootropics tap into Mintel's [Augmented Human](#) Trend, which discusses how recent innovations are enhancing the way we live – offering opportunities to push the body beyond its limits.

Nootropic products are still niche but have potential to expand as products to support brain health grow.

Nootropic drinks supportive of mental performance



Highlight naturalness

[Herbal Fix Focus Passion Fruit Flavored Drink](#) contains a unique herbal blend of **amla, gotu kola, ginkgo biloba, siberian ginseng, green tea and B vitamins and zinc** to boost focus (Australia).



Add solid science

[Arepa Nootropic Beverage](#) contains **L-theanine Suntheanine, NZ Neuroberry Juice and NZ Pine Bark Extract Enzogenol** for mental focus and clarity (New Zealand).



Educate on nootropics

[Shine+ Smart Drink Shot](#). The caffeinated beverage is made with natural functional ingredients like **ginkgo biloba, turmeric, siberian ginseng, green tea, caffeine, vitamin B6 and vitamin B12** for mind and health benefits (Australia).

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What are adaptogens?

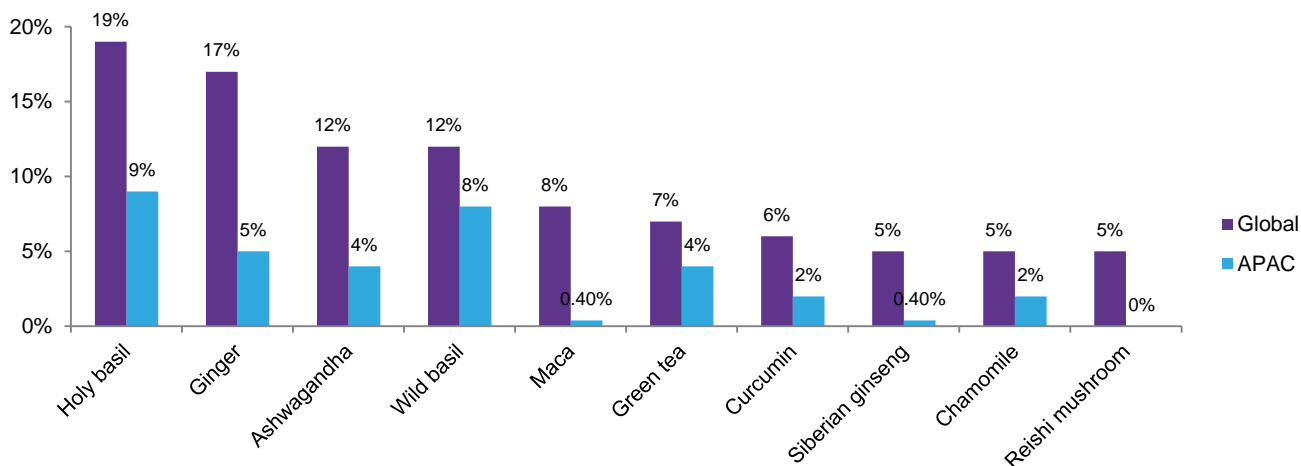
'Adaptogen' is the latest buzzword in the health and wellness space. Although there is no legal definition, adaptogens are generally defined as any ingredient that can help the body to better cope with physical or mental stress.

Why they have potential

Stress and anxiety are common problems faced by consumers around the world. There are opportunities for food and drink manufacturers to incorporate adaptogens into products for [stressed-out consumers](#) to help them gain control over their stress.

Adaptogens and nervines provide natural stress relief

Global vs APAC: new food, drink and VMS containing select adaptogenic ingredients*, Sep 2014-Aug 2019



Adaptogens, such as holy basil, ashwagandha and medicinal mushrooms, are ingredients that help the body better cope with stress and help consumers to relax.

[Nervines](#) are another group of stress-fighting herbs related to adaptogens. Sedative nervines include chamomile, lemon balm, valerian and lavender.

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Innovative beverage brands from the US showcasing adaptogens



Rise of medicinal mushroom for stress and fatigue

[Om Reishi Mushroom Powder](#) contains reishi mushroom that claims to balance mental and physical stress, nourishes the heart and soothes an overactive immune system and helps enlighten and relax.



Nervines: lavender, chamomile, lemon balm etc

[Goldthread Lavender Bliss Tonic](#) is formulated with 'super-herbs', spices and adaptogens. The formula features linden flowers, lavender, saffron, chamomile, elderflowers, lemon verbena, sage leaf and butterfly flower.



Hemp extract and ginseng

[Recess Blackberry Chai Sparkling Water](#) is infused with hemp extracts and adaptogens, including American ginseng for focus and memory, L-theanine to reduce stress and schizandra to boost immunity and promote balance.

❖ SYNBIOTICS AND POSTBIOTICS FOR GUT HEALTH AND WELLNESS

Digestive health and wellness is increasingly recognized as an integral part of wellbeing. Scientific research has found links between the gut microbiome and many aspects of health: from mental health to skin health and even obesity. Brands are taking advantage of gut health awareness among consumers as the launches increase year on year.

Synbiotics and postbiotics are the new category of ingredients in the gut health and wellness field.

Synbiotics, which are specific combinations of probiotics and prebiotics that work synergistically within the body, are starting to be added to food and drink product to provide health benefits.

Postbiotics, a relatively new term for the beneficial waste products of probiotic bacteria, is also emerging as a new ingredient to watch.

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What are 'synbiotics'?

'Synbiotic' is a combination of synergistically acting probiotics and prebiotics added to food ingredients or supplements. The [United Nations Food & Agriculture Organization](#) recommends that the term "synbiotic" be used only if the net health benefit is synergistic. Known synbiotic formulations are *Bifidobacteria* with fructooligosaccharides (FOS) and *Lactobacillus rhamnosus* GG with inulin. Products launched with 'synbiotic' in the product description are still niche.

Why they have potential

Following the success of probiotics, the addition of synbiotics could be the next evolution for gut health products. With some [backlashes on probiotics efficacy](#), there is an opportunity for synbiotics to flourish as a way to nurture the gut microbiota.

For probiotic brands to survive in the gut health market and to improve the viability of probiotics in their products, they can add prebiotics. The rationale behind synbiotics is that they overcome possible survival difficulties for probiotics during the passage through the upper intestinal tract.

Brands could capitalize on Asian consumers' growing [interest](#) in gut health and in getting [more fiber](#) in their diet.

Big brands are diving into the niche 'synbiotic' trend



GOS-enhanced yogurt drink

[Yakult Synbiotic W Drink](#) is a fat-free yogurt drink containing 0.1% milk fat, *Lactobacillus casei Shirota* and galactooligosaccharides (GOS) to maintain healthy gut and everyday health (Japan).



Convenient "daily shot" format

[Danone Activia Probiotic & Prebiotic Shot Vanilla Yogurt](#) claims to deliver billions of active probiotics, fortified with prebiotic chicory root fiber (Australia).



Highlight the pre- and probiotic combo

[Dutch Mill Delight Probiotic + Prebiotic Fiber Drink](#) contains DUO ACTIVE combo of probiotics *Lactobacillus paracasei* and *Streptococcus thermophilus* plus inulin for a healthier and happier digestive system (Philippines).

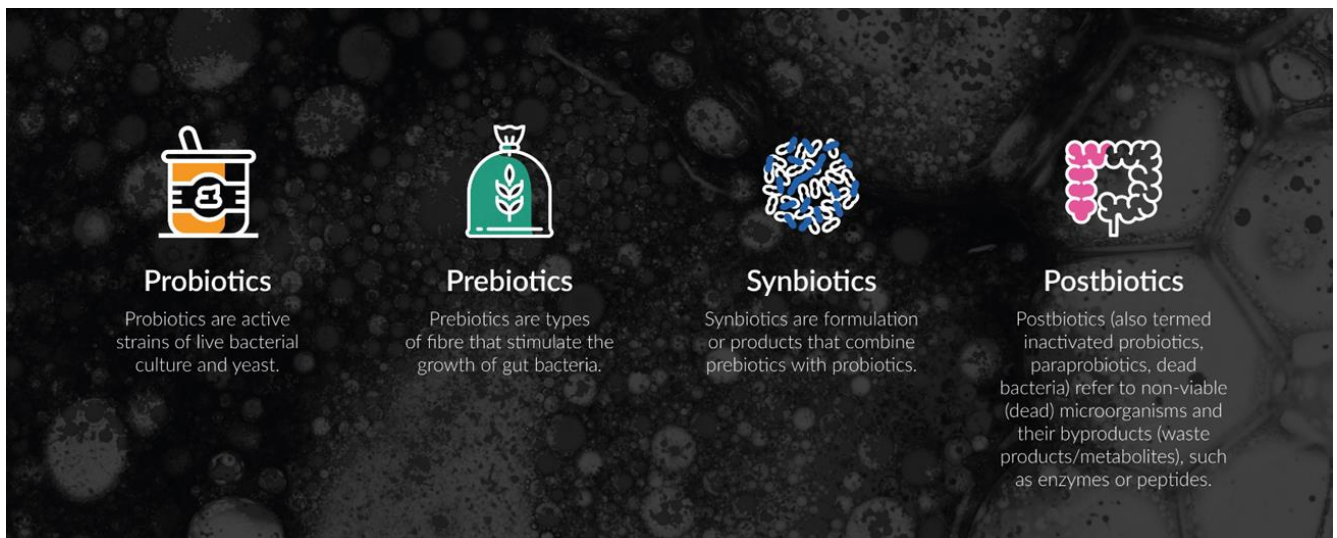
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What are 'postbiotics'?

According to a [recent study](#) published by Trends in Food Science & Technology, [postbiotic](#) is a newly coined term for metabolic byproducts or "beneficial waste products" of probiotic bacteria, such as organic acids or short-chain fatty acids, peptidoglycans, and polysaccharides. These bacteria, produced in our gut, could be key regulators of [gastrointestinal \(GI\) health](#) and boost immunity.

To date, very few products containing postbiotic ingredients have launched; they mostly come from [Asia Pacific](#). Chiefly applied commercially in personal care products, postbiotic potential is now appearing in pharmaceutical and functional food and drink categories. For example, [Danone Nutricia](#) have reformulated their [Aptamil follow-on formula](#) to contain a blend of 'prebiotics and postbiotics' which offers immunity and gut health benefits for infants.



❖ BANANA BLOSSOM FOR MATERNAL NUTRITION

Nutritional needs of modern women change with their life stage and nutritional status, giving brands opportunity to develop formulations that cater to these. The use of banana blossom in postnatal care products provides traditional and natural nutrition, which can help boost nursing mothers' milk production.

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What is banana blossom?

Known as "banana heart", banana blossom is a fleshy, purple-skinned flower, shaped like a tear, which grows at the end of a banana fruit cluster. It is loaded with fiber, protein, potassium, calcium, copper, phosphorus, iron, magnesium, and vitamin E. Traditionally used in Southeast Asian and Indian cooking, it can be eaten raw or cooked and added to salads, soups, stir-fries and herbal teas.

In Thailand, mothers turn to banana blossom soup to nurture breastfeeding.

Why it has potential

In Asian countries where rates of exclusive breastfeeding are [slowly increasing](#), the demand for lactation-boosting products see modern mothers turning to traditional remedies to address their lack of breast milk.

This is evidenced from the rising interest on lactation techniques, with mothers actively sharing tips on social media. Traditional postpartum foods like banana blossom consumption serve as a reference point for lactating mothers. These [lactogenic](#) food helps [increase levels of prolactin](#) for breastmilk production support.

Thai companies are creating convenient ready-to-drink beverages containing banana blossom for mothers



In meal replacement beverage

[Tiny Tree Banana Blossom Breastfeeding Drink](#) is a herbal drink that is made from 100%-premium-natural banana blossom, lemongrass and ginger for milk stimulation (Thailand).



In RTD and instant powder mix

[Plee Preme Banana Blossom Infusion Ready-to-drink and Powdered Instant Banana Drink](#). Supported by Thailand Research Fund, the RTD and powdered supplement are derived from the banana flower to increase breast milk production (Thailand).



In can

[Mommylicious Juice Super Huaplee Plus+ Drink](#). This Thai-style delicious health drink is made from banana blossom juice, ginger, Thai eggplant and holy basil. It is easy to drink, convenient and tastes good (Thailand).

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❖ KONJAC ROOT FOR WEIGHT AND DIABETES MANAGEMENT

In Asia Pacific, food, drink and supplement products that support weight and diabetes management are here to stay. Brands could leverage on using konjac root and position them with weight and diabetes management related claims such as reduced carbs, slimming, high fiber, and high satiety.

According to International Diabetes Federation, [84 million adults aged 18-99](#) are living with diabetes in the Southeast Asia region. This figure is projected to increase to 156 million by 2045.

In [2017/18](#), 32% of New Zealanders aged 15+ were obese, increasing from 27% in 2006/07.

In the same year, 67% of [Australian adults](#) were overweight or obese (12.5 million people), an increase from 63.4% in 2014-15.

In [Malaysia](#), 30% of children and teenagers aged 6-17 are either obese or overweight.

What is konjac root?

Traditionally used in Japanese cuisine and Chinese medicine, konjac root is high in beneficial soluble fiber called *glucomannan*. It is used as a dietary supplement and to make high-fiber flour.

Made from konjac yam, shirataki are traditional Japanese noodles that contain 97% water and 3% glucomannan fiber; are low in calories (7kcal per 100g) and are a source of calcium, iron, and fiber.

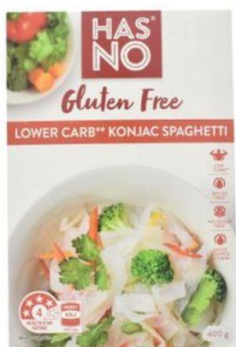
Why they have potential

Brands could leverage konjac root as an ultimate diet food, due to their rich health and nutrition attributes, for weight management and diabetes support. According to the [International Journal of Biological Macromolecules](#), glucomannan can reduce the levels of triglycerides, glucose and blood pressure, enable weight loss and work as a prebiotic.

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Position konjac and shirataki with weight management-related claims



Reduced carbohydrate

[Has No Gluten Free Lower Carb Konjac Spaghetti](#) contains no gluten, 99% fat-free, 99% sugar-free, low in carbohydrates and energy and has a good source of fiber (Australia).



Weight loss

[Glam.D 4kcal Peach Flavoured Konjac Water Jelly](#) is made with 0.162% konjac powder and 0.027% peach juice concentrate and provides four calories per pack that contributes to weight loss (South Korea).



High fiber/high satiety

[Grn+ Konjac Bar](#) contains 13% konjac powder and 0.2% glucomannan to offer high satiety and is said to be ideal as a healthy children's snack as well as a breakfast placement (South Korea).