

## **About the author**

Disclaimer

## **EXECUTIVE SUMMARY**

Introduction

Market drivers and dynamics

New product launches

Technical innovations in fat reduction and replacement

Conclusions

## **Introduction**

Summary

Introduction

Fat reduction and replacement – opportunities and challenges

The importance of healthy foods

Market opportunities

The reduction and replacement challenge

Target fats for replacement

Total fat

Saturated fatty acids

Trans fatty acids

Cholesterol

Fat types and levels in food and drinks

Functionality of fats in foods

The ideal fat replacer

Scope and structure of the report

Methodology

## **Market drivers and dynamics**

Summary

Introduction

Public health and fat consumption

Links between fat consumption and health

Fat consumption trends around the world

High prevalence of relevant disease and risk factors

Metabolic syndrome

Diet and obesity in children

Dietary advice/guidelines

International guidelines

Nutritional advice for disease prevention and at risk groups

Recent developments

Campaigns aimed at fat reduction

Trans fat as an example

New technologies, channels, and partnerships

Regulation, claims, labeling, and advertising

Permitted levels

Claims

Labeling

Advertising and marketing

The market potential for reduced fat type foods

Health-related food and drink sectors

Concerned consumers and governments

Opportunities in all geographic regions

## **New product review**

Summary

Introduction

Summary and claim analysis

'Reduced fat type' claim frequency on new products

Breakdown of 'reduced fat type' claims

Additional tags on new 'reduced fat type' foods

Health-related claims and tags

Category analysis

Bakery and cereals

Dairy

Savory snacks

Frozen food

Oils and fats

Regional analysis

North America

Europe

Asia Pacific

South and Central America

Middle East and Africa

The role of key food and drink manufacturers

General manufacturer strategies

Key food and drink manufacturers

New products and innovation focus

## **Technical innovations in fat reduction and replacement**

Summary

Introduction

Categorizing fat replacers

Composition

Functionality

Target for reduction or replacement

Innovations in ingredients and technologies

- General fat reduction and replacement
- Saturated fat reduction and replacement
- Trans fatty acid replacement
- Cholesterol reduction

Fat reduction and replacement as a multi-component approach

Emerging opportunities in metabolism, satiety, and perception

- Natural ingredients with benefits for body fat reduction

- Digestion and satiety

- Fat perception and preferences

## **Conclusions**

Summary

Introduction

What will make a future successful reduced fat product?

Key claims, categories, and regions

- Claims/fat reduction targets

- Categories

- Regions

Current and future successful fat replacers

Challenges and issues

- Real technical challenges

- Consumer expectations and acceptance

- Is fat reduction and replacement actually leading to improved health?

Future opportunities

- Positive claims

- Reduced fat in the context of an overall healthier lifestyle and diet

- The Holy Grail

## **Appendix**

Scope

Methodology

- Secondary research

Glossary/abbreviations

Bibliography/references

- Chapter 2

- Chapter 3

- Chapter 4

- Chapter 5

## **TABLES**

Table: Industry executives' opinion on the availability and acceptability of reduced fat type food and drink offerings, 2011

Table: Obese adults (%), by country, 1995–2015

Table: Estimated prevalence of dyslipidemia in the seven major markets, 2009

Table: Estimated prevalence of hypertension in the seven major markets, 2009

Table: Epidemiology of diabetes by region, 2010–30

Table: WHO population nutrient intake goals

Table: Diet food and drink market, Europe and the US (\$m), 2006–10

Table: Use of nutrient content claims on new food and non-alcoholic drink products, 2008–10

Table: Top 20 claims/tags on new food and non-alcoholic drink products, 2008–10

Table: Share of 'reduced fat type' launches, by category, 2008–10

Table: Comparison of overall product launches\* versus 'reduced fat type' launches, by category, 2008–10

Table: Frequency of word appearance of a selection of thickeners/gelling agents/texturizers in ingredients lists of new 'reduced fat type' food and drinks, 2008–10

Table: Approximate frequency of use of oils with lower saturated fatty acid levels in new 'reduced fat type' products, 2008-2010

Table: Industry executives' opinion on the importance of calorie/fat reduction claims

Table: Industry executives' opinion on the potential for new reduced fat food and drink products across a range of categories, 2011

Table: Industry executives' opinion on the potential for reduced fat food and drink products across global regions

## FIGURES

Figure: Manufacturer and consumer roles in creating the reduced fat market

Figure: Examples of potential higher fat food products within major categories

Figure: Functions of fats in food and drinks

Figure: Fat and carbohydrate intake in nutrition transition

Figure: A selection of books about trans fats available at Amazon UK

Figure: Codex Alimentarius conditions for fat-related nutrient content claims

Figure: Sainsbury's front-of-pack multiple traffic light labeling

Figure: Share of 'reduced fat type' claims for new products, 2008–10

Figure: New single serve 'reduced fat type' products

Figure: Products with heart health claims and 'ticks'/seals of approval

Figure: New 'reduced fat type' products claiming to be cholesterol-lowering

Figure: New 'reduced fat type' Weight Watchers-branded products

Figure: New reduced fat digestives

Figure: New cookies targeted towards kids with no trans fat and no cholesterol

Figure: New low fat bread products

Figure: Examples of new 'reduced fat type' breakfast cereals from Kellogg's

Figure: New low fat, low sugar, and low salt breakfast cereals

Figure: New 'reduced fat type' Nabisco crackers

Figure: New non-fat yogurts

Figure: New "natural" and 'reduced fat type' yogurts containing rice starch

Figure: New 1% fat milks

Figure: New reduced fat milks with functional ingredients

Figure: New reduced or low fat and low sodium cheeses

Figure: New reduced fat PepsiCo/Frito-Lay savory snacks

Figure: New "no trans fat" savory snacks containing high levels of oleic vegetable oil

Figure: New "healthy" and low or "reduced fat type" potato chip-style products

Figure: New reduced fat savory snacks based on a traditional theme

Figure: Breyers low fat ice cream made using the "cream press system"

Figure: A selection of new "reduced fat type" ice creams containing polydextrose

Figure: New frozen ready meals with 0g trans fat claims

Figure: New non-fat cooking sprays

Figure: New cholesterol-free ghee products

Figure: Proportion of reduced fat products among all food and non-alcoholic drink launches, by region, 2008–10

Figure: Regional share of food and non-alcoholic drink launches, 2008–10

Figure: Examples of novel North American reduced fat product launches

Figure: New Marks & Spencer "Count on Us" reduced fat chilled products

Figure: Noodle products with 'reduced fat type' claims launched in Asia Pacific

Figure: New South American products with a "no trans fat" claim or tag

Figure: New reduced fat Nestlé ice cream products

Figure: New reduced fat and "enriched" Unilever spreads

Figure: New Unilever 'reduced fat type' mayonnaise products

Figure: New lower fat Philadelphia cream cheese

Figure: Different modes of categorizing fat replacers

Figure: Products made with Olean brand Olestra

Figure: A hierarchy of fat replacers, by functionality

Figure: Ingredients and technologies for fat reduction and replacement

Figure: New functional drinks containing medium chain triglycerides

Figure: New 'reduced fat type' products containing tapioca maltodextrin

Figure: New reduced fat products formulated with several texturizers, thickeners, or stabilizers

Figure: Examples of Egg Beaters products recently launched in the US

Figure: A multi-component approach to fat reduction and replacement