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Nightmare on Claims Street sends a chill through the industry

By Richard Clarke

As the month of Halloween, October is no stranger to horror stories. So perhaps it was appropriate that the European Food Safety Authority (EFSA) chose it to reveal the latest chapter in the food and drink industry's very own living nightmare.

On 1 October, EFSA published scientific opinions for 523 claims submitted for evaluation under the European Union's Nutrition & Health Claims Regulation. They represented the first batch of Article 13.1 claims to be assessed for inclusion on the 'Community List' of health claims, which will be available to be used by any company wishing to do so.

About two thirds of the claims were rejected, continuing a depressingly familiar trend that has seen EFSA turn down the vast majority of all of the claims it has so far examined under the various sections of this regulation.

The prevailing mood was summed up neatly by the Alliance for Natural Health (ANH), a UK-based group that campaigns for access to natural health products.

"The graveyard of disallowed claims is not a pleasant place to be," it said in a statement released just days after the 1 October opinions. "The list of failed claims applications is seemingly endless and it makes

very disturbing reading when you see the level of proof that EFSA is relying on. If such a level of proof were used for drugs, most would not make it to market. The regulation is designed to protect the interests of consumers. It's meant to stop them being fed a diet of misleading misinformation.

PROBIOTICS ARE THE BIGGEST LOSERS SO FAR

While it cannot be denied the food and supplement industry has entertained its fair share of cowboys, our concern is that the regulation goes so far as to throw the baby out with the bathwater.

"At the very point in time when consumers need most information to help them make the right food and supplement choices to help them offset largely preventable chronic diseases, we see the industry being gagged. We regard this regulation as probably the greatest infringement of freedom of speech to impact the health food industry anywhere in the world."

There will be many, in the food industry and beyond, who agree wholeheartedly with these eloquently-phrased sentiments. The mainstream media, however, is unlikely to be among them. When the 1 October opinions

came out, they sparked a predictable industry-bashing frenzy in which probiotics – the highest profile of all functional ingredients – were the biggest losers. In a typical story in the aftermath of 1 October, the UK's *Daily Mail*, which is read by millions of people every day, reported: "Claims that probiotic yogurt drinks packed with so-called 'good bacteria' improve your health can not be proven."

It is true that no claims for probiotics were given positive opinions on 1 October. But scratch the surface of this apparently startling fact and the story isn't quite as clear cut, or as dramatic, as it might seem. In fact, dozens and dozens of claims for probiotics were rejected simply because the micro-organism cited in the application hadn't been "characterised" to EFSA's satisfaction. In other words, they were not identified in enough detail, mainly because although the species was specified the strain number was not. In fact, in total, nearly half of all the rejected 1 October claims were turned down on the basis of characterisation rather than the evidence itself.

It was, in essence, a case of failing on a technicality, though this was not how it was interpreted by many consumer journalists. The probiotics sector was given yet another

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Swiss iced tea drink “tooth-friendly”

By Kati Weiss

Take the fizz out of your soft drink and replace cavity-causing sugars with healthier sweeteners – that is the essence of Swiss Bischofszell’s approach to creating a tooth-friendly iced tea drink.

Launched in October by the leading Swiss retailer chain Migros, Bischofszell’s toothfriendly “Good for Me” iced tea drink comes in 330ml PET-bottles priced at 1 CHF (€0.60), on a price-per-litre basis a 100% premium over rival iced teas. By comparison, for example, Nestea Vitao – the largest iced tea brand with health positioning on the Swiss market – costs CHF1.50 (€0.90) per 0.5 litre. Good for Me is available in two flavours: Orange and Honey.

“In Switzerland, a beverage can be labelled as “toothfriendly” only if it demonstrably causes neither caries nor dental erosion,” Bischofszell’s Product Group Manager Arnold Graf told *New Nutrition Business*. “Consequently, the Good for Me concept had to be built on a product formulation which did not contain any fermentable sugars or unacceptable amounts of citric or phosphoric acids.”

Good for Me is sweetened with isomaltulose, a toothfriendly disaccharide derived from sugar beet. Isomaltulose received its novel food status in Europe four years ago and has since been used as a bulk sweetener in beverage formulations such as Yakult Bifiene or Ovomaltine.

“Isomaltulose provides excellent mouth feel which is usually lacking in beverages sweetened solely with intense sweeteners,” explains Graf. “However, as isomaltulose has a sweetness level only half that of regular sugar, we added some sucralose to round up the flavour.”

The limitation on citric acid use was more difficult to overcome, as relatively low levels of acid can attack dental enamel. “After a period of trial and error, we came up with a totally acid-free recipe,” says Graf. “The product was tested at the Dental Institute of Zurich University and was approved by a team of experts as safe for teeth.”

According to Graf, Good for Me is

positioned between traditional iced tea products and lifestyle brands with mass market appeal. Primary target consumers are described by the company as health-conscious shoppers – especially mothers. Nevertheless, Bischofszell carefully avoids branding the beverage as a “kids’ drink”.

“Parents are clearly one key target group as they often worry about the effects that soft drinks might have on their children’s teeth. However, we believe that the toothfriendly concept has relevance and novelty value for a much wider audience.”

To attract the masses, the communication around Good For Me doesn’t mention unpleasant medical terms such as dental caries. Instead the message is focused on positive aspects of oral health or, as highlighted on the front of the label, the “toothfriendly” benefits.

In addition the label carries the “Happy Tooth” logo which is widely used on sugar-free confectionery products in Switzerland. Signalling that the product meets criteria developed by Swiss University Dental Institutes, the logo is governed by the non-profit organisation Toothfriendly International (www.toothfriendly.ch) and



is available for any company to use whose products meet its standards.

According to the University of Zürich, Good for Me is the first commercial soft drink product to pass the stringent testing procedure and qualify for the “safe for teeth” claim.

Graf is aware of the unique proposition: “Dental benefits are a new area in beverage marketing and we strongly believe we have a first-comer advantage on the market. This is a product which tastes good and will have a nationwide distribution by the country’s number one retailer. In addition, we have the necessary scientific back-up for our dental claim.”

PR and professional endorsements form a large part of the brand building. In the product launch phase, Bischofszell is hoping to promote Good for Me mainly through dentists and other opinion leaders. The retailer Migros will do its part of the communications, but advertising on a larger scale will follow only once the product has established its niche in the market. “The sales results of the first few months will determine the size of our marketing muscles in the future,” says Graf.

FORMULATING TOOTH-FRIENDLY BEVERAGES

For the formulation of a tooth-friendly beverage, acids with no or low buffering capacity are required. Adding calcium will compensate only for some but not all the negative dental effects of the acids. Therefore, adding calcium salts and thickeners is not a solution. The most effective measure is to lower the acidity of the product. This, however, may have implications for the microbiological stability of the product, except if aseptic packaging can be guaranteed.

The only reliable way to test the dental risks of a product is by means of intraoral plaque-pH telemetry. The test is conducted by certified University dental faculties (Zürich, Jena, Sendai). This test is generally recognized by the dental profession for identifying foods or food ingredients that cannot be degraded by the micro-organisms of the dental plaque to tooth-destroying acids.

Comparative health claims? No can do, says EFSA

By Kati Weiss

The charade around the EU health claim regime continues as the European Food Safety Authority (EFSA) recently announced that it is unable to assess around 280 health claims pending for EU approval. Worst hit are so-called “comparative” claims which refer to satiety or dental health.

In its draft minutes made public in July, EFSA is requesting that the EU Commission delete 278 claims from the list of notified Article 13(1) claims on the basis that they are “not fit for evaluation”. As a direct consequence, these health claims – once the initiative is officially accepted by the EU Member States – cannot be authorized and are therefore bound to disappear after a transition period.

For example, EFSA now declares itself unable – or unwilling – to evaluate claims which are “comparative” in the sense that the claimed positive health effect is the consequence of the absence of a negative effect – such as *toothfriendly* or *non-cariogenic*.

EFSA justifies the elimination of such claims with the argument that a health benefit can only be accepted if it can be attributed to a food component or substance which exerts a certain measurable physiological effect. In other words, EFSA applies an approach that is typical for the assessment of pharmaceuticals.

Following this same approach, EFSA refuses to assess claims referring to the health benefits of foods low in salt or trans-fatty acids, as the claimed positive health effect is not the consequence of an active effect but merely the result of substituting food with a more favourable nutritional profile for a product with a less desirable one. Also many fruits and vegetables will not be eligible for EFSA's assessment, as the main health benefit of low-caloric fruits and vegetables is the replacement of high-energy foods in the diet.

Similarly, EFSA has stated that it cannot assess claims referring to a satiating effect. The industry is baffled, as satiety and weight management claims are explicitly mentioned as a subgroup of Article 13.1 claims. If comparative claims are indeed excluded from the EU's final positive list, this is a death

stroke for claims such as *helps to eat less* or *helps to keep you fuller longer*.

EFSA's decision to declare certain claims “comparative” seems to lack any scientific rationale. Firstly, the term is a misnomer as “comparative claim” is defined in the regulation differently and refers to nutrition claims only. Furthermore, only a claim *safer to teeth* would be truly comparative – not the term *safe for teeth*.

Curiously enough, EFSA was perfectly capable of expressing its scientific opinion on the dental benefits of sugar-free chewing gum a month ago. As a consequence, manufacturers may soon use the claim “*sugar-free chewing gum supports localized tooth mineralisation*”, but they are unable to say “*sugar-free chewing gum is toothfriendly*”. Did EFSA forget that the claims regulation has been made to help consumers?

SCIENTISTS QUESTION EFSA'S LOGIC

Dental professionals fear that EFSA's ignorance of simple dental claims may drive the industry right back to producing sugar-loaded products.

“The *toothfriendly* claim has previously been evaluated and accepted not only by the US FDA but also by the German Food Control Authority,” says Prof. Stefan Zimmer from the Dental University of Witten/Herdecke, Germany. “It has been used on European confectionery products for more than 25 years. EFSA's request to withdraw the claim certainly does not have the support of the dental community.”

Fighting against the EU's regulatory windmills may seem hopeless though. “There is no remedy against negative EFSA opinions,” says Dr. Albert Bär of Toothfriendly International, which governs the use of the “Happy Tooth” logo in Switzerland. “Only a full-scale media campaign which spells out the faults in EFSA's arguments could perhaps make the Member States more critical about EFSA's own interpretation of the claims regulation. Nowhere in the regulation is it said, however, that foods should be treated like medicines”.

At this time consumers and nutritionists still appear to not have realized that EFSA's zeal to kick out health claims that do not fit into its guidelines will obstruct rather than facilitate healthy food choices. It is also problematic that in this process only the opinions of EFSA's panel members count while divergent opinions of other qualified scientists are completely ignored.

With the opinions of EFSA being discussed behind closed doors and without any public comment period, this process appears to be opaque rather than transparent and, on occasion, obstructive rather than constructive.

Since both the Commission and Member States appear to accept the science monopoly which EFSA exercises, the only hope for a corrective course remains with the EU Parliament, which after all has played an important role in the modelling of the claims regulation. However, any corrections should be made now, and not when it is too late.

EFSA CONSIDERS THE FOLLOWING TYPE OF HEALTH CLAIMS AS NOT SUITABLE FOR A SCIENTIFIC ASSESSMENT:

- 1) Claims for branded products.
- 2) Claims which are not sufficiently characterized to allow an assessment – e.g. “low-GI” and “antioxidant”.
- 3) Claims which are comparative in the sense that the claimed positive health effect is the consequence of the absence of a negative effect – e.g. “safe for teeth”, “helps to eat less”.

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pounding in the media, with market leaders Danone and Yakult forced to rush out statements clarifying that their particular probiotic strains had not yet been evaluated.

OPINION DIVIDED OVER WHERE BLAME LIES

The inevitable public fall-out from EFSA's opinion rather begs the question: could the agency have been more helpful? Given the way its complex, jargon-rich opinions were likely to be interpreted by a media that favours simplicity over the truth, should it have made more of an effort to enable companies to get the most basic information right before casting judgment?

There is a feeling among some, for example, that the agency could have referred poorly characterised probiotic claims back to member states for clarification before issuing an opinion on them. It has already done this in some cases, where a claim was considered too vague for assessment for example.

Certainly this is the view of the European Federation of Associations of Health Product Manufacturers (known as EHPM). Its director of regulatory affairs, Lorène Courrège, says: "We have noted that many claims have been rejected for lack of characterisation, for example some probiotics or botanicals. We are somewhat puzzled that EFSA has not asked for further clarification on those claims to member states, as it has done for so many other claims. We believe further clarification on this would be of interest to all, industry as well as consumers, and would avoid discrimination between the claims already evaluated and the ones that will be evaluated at a later stage."

Consultant David Richardson of London-based DPR Nutrition agrees. "Clearly, there are concerns that EFSA or the Commission had plenty of time to ask for further information about the characterisation of the food or constituent," he says. "Guidance from EFSA should have been provided before it undertook its assessments. If the industry had been told claims would be rejected on the basis of a lack of characterisation they probably would have been able to provide EFSA with more information. But they didn't come back and ask, apparently."

In contrast, however, Nino Binns of Ireland-based NB Consulting says it would have been a lot to expect EFSA to have screened claims out early on the basis of characterisation. "That involves quite a detailed assessment," she says. "The first

screen was done largely by the [EFSA] secretariat. There would have been information there about the characterisation and it would have looked OK. So they weren't aware then there wasn't sufficient characterisation, until they looked in more detail."

Nigel Baldwin, scientific and regulatory consultant at Cantox Health Sciences International, says that from a scientific perspective failing to characterise a probiotic correctly is a basic and avoidable error. "It's fundamental," he says. "The first thing that happens in any kind of review for any kind of natural ingredient is they bombard you with questions about the composition. For cultures it's vitally important. Take *acidophilus*. There are probably loads and loads of strains, and if you boil down the research you'll probably find most of what's meaningful covers a couple. Take *E-coli*. *E-coli* 0157 can kill you. But your gut's full of *E-coli*. It's a perfectly normal enteric micro-organism. One strain of *E-coli* can kill you and another forms a perfectly normal part of your gut. Strain is very important in micro-organisms."

The good news is that characterisation needn't be a major impediment to success in the claims approval process. "It's easily rectifiable," says Baldwin, although as there is no appeals procedure in the 13.1 process this will have to be done through a new 13.5 dossier.

CLAIMS PROCESS WAS FLAWED FROM THE START

Baldwin believes the member states, not EFSA, should have weeded out poorly characterised ingredients before they got to the evaluation stage. "There's an awful lot of rubbish in there," he says. "There's a lot of stuff which should have been challenged and screened out by member states, and now EFSA is having to do the dirty work."

Here, Baldwin is referring to a screening process that began about three years ago when member states began working with the industry to collate a list of claims for consideration for inclusion on the Community List. The idea was that the member states would vet those claims before putting them EFSA's way. Notoriously, the states submitted a combined 40,000 claims, which EFSA then whittled down to about 4,000 or so, having removed multiple duplications.

It has subsequently emerged that Article

13.1 claims are being assessed in exactly the same way as Article 13.5 claims (which cover new and proprietary science) and Article 14 claims (which cover children's and disease risk reduction claims). Crucially, however, the manner in which the evidence for them was submitted differs greatly. EFSA requires detailed dossiers to accompany Article 13.5 and 14 claims applications. Conversely evidence for 13.1 claims was submitted on a simple table that contained little more than details of the claim to be made and the references for the studies that were being cited as evidence to back it. No narrative, or explanation of the references, was required or indeed offered.

This process lies at the heart of today's problem, says Baldwin, who adds that the industry bears some responsibility for this. "The whole thing was flawed from the beginning," he says. "They [the Commission] put the Article 13.1 list in [the Regulation] with the good intention of saying: there's a lot of stuff which is generally accepted, which we can just whip through straight and quick, and said the requirement for that was to supply a list of references to accompany each claim.

"Then the trade associations drew up a kind of table with a series of headings for the claim, the references and so on, and said: is this a suitable format for us to submit the claims in? They promoted that to the European Commission, and I don't think the Commission physically approved it but I don't think they disagreed with it either.

"But no one really asked EFSA whether there would be a two-speed scientific process. And as far as EFSA is concerned, you either review the science or you review the science. So you're asking EFSA to review the science, but you're just providing them with a list of references. You're not providing them with information about why you chose those references, how those references hold themselves together, about the interpretation of the totality of the references. All of that is in the dossiers [for 13.5 and 14 claims], but not in the article 13.1 process."

Baldwin's point is that the industry and member states used a mechanism to apply for claims which was perhaps the easier route to take but also the riskiest. "If you submit a dumb list of references with no comment on them then you just leave EFSA to interpret them as they will," he says.

Hindsight is always a marvellous thing, and many in the industry will complain they were left to second-guess EFSA's requirements

in the early days of the regulation. But even if the latest wave of opinions do shed an unforgiving light on past mistakes made by the industry, they also throw the spotlight once again on the enormous scientific hurdles food and beverage companies will have to overcome to gain a positive opinion from EFSA.

BENEFITS FOR GENERAL POPULATION HARD TO PROVE

One criteria that is proving particularly difficult to satisfy is that an ingredient should be shown to benefit the general population, not just people who are diseased. Glucosamine and chondroitin, popular ingredients linked with joint health, are good examples here. There were no claims approved for these ingredients on 1 October, largely because EFSA did not feel their effectiveness was proven in normal people – only those with joint health problems.

Richardson says: “This is where some of the controversy is: what evidence you can actually use in support of a health claim for the general population. If you are carrying out studies in nutrition to see the beneficial effect of something, you tend to use biomarkers that have been developed for disease conditions. You typically do many of your experiments in populations that already have pre-clinical or clinical conditions. So, for example, with inflammatory joint disease the chances of you seeing the effect of a beneficial component on joint health is likely to be in those people that have already got some kind of condition. If you did it in a healthy population, it would be unlikely to show anything. Such people take a product in the hope they don’t get a joint problem. But EFSA is certainly focusing very much on the demonstration of conclusive evidence of cause and effect in the general population and frankly I think that is virtually unachievable.”

On this point, the ANH highlights a 1 October opinion concerning the precursor of tryptophan, 5-HTP, which it says helps the body produce more serotonin, thereby helping to manage anxiety. “While EFSA recognised this fact, it argued that this is only of benefit when serotonin production is suppressed in anxious people, who do not exhibit ‘normal attention,’” says ANH. “EFSA, not surprisingly, failed to find benefits for

people exhibiting ‘normal attention’, given that such people are already producing more than enough serotonin. And that’s why, dear EFSA, some of us use 5-HTP when we are stressed out, and not when we’re on holiday! Please – pass me 100 mg of 5-HTP before they ban it – reading these EFSA opinions is very stressful!”

Baldwin says the general population stipulation needn’t mean despair, as it may sometimes be possible to filter studies and extract relevant data which could persuade EFSA they are relevant to the general population. He says: “Perhaps – and I’m not saying for definite – if you look at a study in more detail you’d be able to demonstrate that within the study population there are people you would consider normal. You could go through the multitude of data on glucosamine and chondroitin, for example, look at the subjects in all the studies and try and tease out those subjects we consider to be normal within the definition of osteoarthritis. Then you may be able to make a case for why a study in this population can be extrapolated to the normal population.”

A third of the opinions issued on 1 October were positive, but these were largely related to vitamins and minerals that have

been considered essential nutrients for decades. As such EFSA was, if not more lenient, then at least more accommodating than it has been for ingredients not considered so essential to human survival.

Tellingly, however, the claims approved for vitamins and minerals are hardly likely to set the functional food industry on fire. “All the claims are pretty bland,” says Binns. “Everything is ‘supports the normal function of ...’. It’s going to be a real test of marketing skills.”

GREY AREAS REMAIN IN TRANSITION PERIOD AND WORDING

There are still issues to be ironed out. Transition periods for companies to stop using rejected claims remain to be confirmed, with concern that the widely touted six months will not be long enough for dried products with long shelf lives (which could be anything from supplements to breakfast cereals and snacks).

Wording is another grey area, specifically whether and how EFSA’s approved claims will be turned into consumer-friendly language. Those adopted into law already by the European Commission (see <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L2009:277:0003:0012:EN:PDF>) are generally pretty consumer friendly. But others may be less so. Furthermore, how will approved claims be translated into foreign languages for use across the EU?

The timeframe is finally becoming clear, however, as is the fact that EFSA will not complete its evaluation of 13.1 claims for some time yet. According to Brussels-based consultancy EAS, the next batch of opinions – covering 700 claims – will be published in February 2010. A further batch covering 500 claims will be with us next July. But the final batch will not appear until summer 2011.

What do these opinions hold in store? Stefanie Geiser, EAS Italy regulatory affairs manager, says the 1 October batch of opinions “raises the question of why there have been so many negative evaluations on similar categories of substances or types of claims all in one go”.

She adds: “Indications from EFSA are that its NDA Panel [which is conducting the assessments] chose this first series based on ease of decision: those for which a positive evaluation was easier to adopt, for example vitamins and minerals, and those which EFSA realised lacked the sufficient characterisation or other data for it to



EFSA has ruled that glucosamine products that are intended for healthy people to consume in order to maintain their health can no longer claim any benefits. EFSA is only interested in conclusive proof of cause and effect in populations with inflammatory joint disease, a hurdle that regulatory experts describe as “virtually unachievable”.

perform a detailed claims assessment.”

So can we infer from this that things might not be so bad next time around? Not necessarily, says Geiser. “The significant negative outcome of this first series of assessments should not be seen as fully indicative for the next series expected in February 2010. However, it demonstrates clearly that few claims are now expected to make it through the process unscathed.”

MOVING FORWARD FROM ARTICLE 13.1 SHOCK

It is possible to take something positive from the Article 13.1 experience, says Baldwin. “In effect you have got a gap analysis. You can say: now I have to focus my R&D plan or my regulatory plan on what they didn’t buy. It might be the composition, or the strain number. But at least you can go forward and

say: I know what they don’t like and I have a strategy going forward for a 13.5 dossier. I can see a lot of dossiers starting off with the 13.1 opinion and moving forward on the basis of what’s missing from the 13.1 opinion.”

On a positive note, there is also the potential to build on the successes. “Should the generic claim be OK, now you could have a follow-up 13.5 dossier which looks at your specific form or specific application or your specific dosage. You might say: we know calcium is good for bones, but I’ve got a form that is ten times more bio-available, or something like that.”

Ultimately, however, the fact remains that the industry is facing censorship on a massive and potentially catastrophic scale. “It’s difficult to get conclusive evidence,” says Richardson. “There should be a focus on evidence-based nutrition rather than a

domination of using pharmaceutical type experimental methods.

“Health claims on foods, applied correctly, have the potential to enhance consumers’ nutritional knowledge and healthy eating patterns, as well as complement national agendas in public nutrition, health protection and improvement.

“The clear aims of the European legislation are to achieve a high degree of consumer protection, to ensure confidence in claims on foods by requiring that all authorised claims should be scientifically substantiated, and to promote and protect innovation. The EFSA assessments need to be proportionate to meet the legitimate expectation of applicants for authorisation of a health claim and to link the totality of the available data and weight of the evidence to claims that are meaningful to consumers.”

ADVERTISING REGULATOR TAKES CUE FROM EFSA – AND SAYS EVIDENCE IT ONCE ACCEPTED IS NOW NOT ENOUGH

Danone’s claims for its highly successful Actimel and Activia probiotic yoghurt products have yet to be evaluated by EFSA. But this didn’t let the company escape media embarrassment in the wake of the 1 October opinions when, exactly two weeks later, the UK’s Advertising Standards Authority (ASA) ruled that health claims used in an advert run by the French dairy giant for Actimel were misleading.

The voluntary UK advertising watchdog has told Danone to cease broadcasting TV adverts that stated its one-shot probiotic drinking yoghurt, Actimel, could boost the immune system of children.

The irony in the ASA’s decision is that the dossier it has just rejected had previously been reviewed and approved as adequate by expert reviewers appointed by the ASA, according to industry sources. Even more ironic, it was the same advisors who have rejected the evidence this time who were previously satisfied with the evidence presented.

The TV commercial in question was aired back in 2006, when implementation of the EU Nutrition & Health Claims Regulation was just beginning. It showed a bottle of the product jumping over a skipping rope, with the sound of children playing in the background. A voice-over stated: “Kids love Actimel and it’s good for them too”. The ad then featured the sound of children cheering. The voice-over continued: “Actimel. Scientifically proven to help support your kids’ defences”. The final image showed the text: “Scientifically proven” stamped on the screen.

The ASA’s investigation into the ad was, in theory, not linked to the health claims regulation, but the methodology used to evaluate the evidence supplied by Danone – and subsequently ban the advert – has clear echoes of an EFSA opinion.

Having taken unspecified “expert advice”, out of a total of 24 studies, the ASA rejected two studies because they involved diseased rather than healthy children; one study because it didn’t examine immunity and was therefore considered irrelevant; another because it was in babies and was not considered pertinent for an advert that appeared to target school age children; and one because it did not show enough of a beneficial effect.

The ruling received enormous media coverage. Danone expressed its disappointment at the ASA ruling and insisted its evidence was strong. But the story was yet another blow for an already-beleaguered probiotics sector, which is finding itself constantly under attack.

The Actimel brand is the UK’s largest probiotic daily dose drink, with retail sales of £200 million (\$326 million/€219 million) in 2008. Sales grew 9% in the first quarter of 2009 in an otherwise static category.



Now EFSA has satiety claims in its sights

By Kati Weiss

The European Food Safety Authority (EFSA) is giving a hard time to Fabules – a clinically-proven, appetite-suppressing ingredient based on palm and oat oil emulsion that is being used in a range of satiety shots including Campina's successful Optimel Control – by proposing a withdrawal of the ingredient's key claim "helps you to eat less".

Since its launch in 2006, the Swiss-based ingredient company DSM Nutritionals has made Fabules one of the key ingredients that food, beverage and supplement companies can turn to if they want to market a product for satiety.

And many have done so: latest product developments include French dairy specialist Candia's Silhouette Active or US-based IdeaVillage's successful dietary supplement SlimShots. A common denominator for these brands is appetite control – they all claim to aid weight management by suppressing the need for snacking.

Eager to get the EU's approval for its satiety claim, DSM is meticulously collecting scientific data to back up Fabules. In one clinical study, for example, the ingredient has been proven to decrease appetite a couple of hours after intake and lower food intake in subsequent meals in the range of 10%-15%. In another more recent study, Fabules was shown to prolong food passage time from mouth to large intestine, demonstrating its potential to stimulate natural appetite control mechanisms.

In fact, Fabules has been the subject of multiple human studies dating back to 1997, all of which have confirmed its effectiveness in causing people to want to eat less. And as a concept, satiety and weight management claims have a place in Europe's regulation and are explicitly mentioned as a subgroup of Article 13.1 claims.

EFSA, however, is not impressed. The notified claim "helps to eat less" was declared unfit for the EU's health claim assessment model based on its "insufficiently characterized and comparative nature", thus

facing a withdrawal from the list of accepted claims without any EFSA opinion. EFSA has decided – see page 7 – that it doesn't like comparative claims, a decision which is widely regarded by regulatory experts as well as industry as a misinterpretation of its brief, and of the regulations.

Bas van Buijtenen, Vice President Human Nutrition & Health at DSM, told *New Nutrition Business* he does not follow EFSA's logic to withdraw satiety claims. "With Fabules, the product composition and active ingredients are sufficiently characterised to allow an assessment. In addition, EFSA already accepted this claim for assessment and an opinion had been previously announced by 31 July 2009."

Furthermore, van Buijtenen argues that the claim "helps to eat less" is by no means a comparative claim in the sense of the EU Regulation. DSM is strongly expressing this view via industry associations and in direct communication with member states. "We are also considering making an article 13.5 submission that would incorporate recent additional scientific evidence," says van Buijtenen.

INNOVATION DRIVEN FROM EUROPE TO ASIA?

According to Emily Tellers, Product Manager of Fabules, it is difficult to say whether EU's health claim regulation has stifled innovation around Fabules in Europe. "Some companies may hold back product development until there is definitive clarity about what can be claimed and what not, but many still show interest in Fabules and go ahead despite the regulatory situation."

"Especially since Fabules was launched in a powder format, we have seen a huge interest in new product applications," says Tellers. "We started with a strong focus on dairy, but lately there has been plenty of innovation going on in the supplement area, as well as in beverages, bars or even soups."

A logical outcome of the EU health claim

regulation is that major companies begin to concentrate their efforts outside Europe. "In the past few months, we have seen many interesting product launches in the US, Asia and Latin America. Personally I consider Asia a key future market for Fabules as the speed of product development is extremely high there."

With all the buzz around Fabules, DSM is confident that satiety will remain an attractive area for food marketers – but not one without challenges. Weight management claims on dairy products make for very skeptical buyers, and deservedly so. "I myself do not like the word "slimming" in the context of Fabules marketing," says Tellers. "Consumers often expect a [magic bullet] when trying to lose weight. It is very important to remain specific to your message and not to overpromise anything."



Launched in the Netherlands and Germany in early 2007, Campina Optimel Control, made with Fabules and carrying the claim that it "helps you eat less" became an immediate success, despite selling at a super-premium price. In Germany, for example, it was the most successful new product launch of 2007 in any category, even out-selling new beers, chocolate bars and energy drinks.

Europe: health claim regulator's decisions "ill-informed and badly-researched"

Imagine a world in which even fruits and vegetables cannot communicate their health benefits or be marketed as something that you should include in your diet as a healthy alternative to high calorific foods. Imagine if you could not advise consumers about the benefits of foods low in salt. Improbable? Not in Europe, where this increasingly is what the future holds in store as a result of decisions by a regulator – EFSA – which is daily proving itself unfit for the task it has been given.

Alarming, so confident is EFSA that it seems that only the opinions of EFSA's panel members count while divergent opinions from other qualified scientists are completely ignored. As a result, leading scientific researchers have already expressed horror at its thinking in the most damning terms possible: "Should such ill-informed and badly-researched conclusions be reached as is the case with the EFSA judgment made here, then we fear for the future of this research in the EU."

Europe has created for itself a health claims system which:

- is even more rigorous than that which applies to pharmaceuticals;
- claims to have a basis in science but where the regulator in practice ignores scientific opinion; and
- will prevent consumers from making healthier choices.

So badly executed is the European health claims regime that recently hundreds of dossiers for probiotic bacteria were rejected not because of science, but because the bacteria had not been sufficiently characterised in the dossier. These dossiers included well-proven bacteria from reputable companies who actually did have the information required – but EFSA had failed to sufficiently define its requirements before the dossiers were submitted and hence the information was not included.

As a result of EFSA's blundering, the mass media has been filled with headlines saying that probiotics "don't work".

Most alarmingly, EFSA has appointed itself the ultimate scientific expert in Europe – alarming companies that are involved in dietary fibre and prebiotics, as well as probiotics, by sending out the message that, as several industry executives told *NNB*, EFSA "doesn't like Bifidus bacteria" and allegedly doesn't want industry to talk about benefits such as "improving the balance of your intestinal flora".

EFSA has seemingly ignored expert researchers' opinion. In July three University of Reading scientists wrote to the European Commission expressing concern about EFSA's approach to evaluating probiotic article 13.1 dossiers, saying that they "vehemently disagree" with EFSA's view that there was no evidence to show that "increasing the number of bifidobacteria in humans is per se beneficial to a normal GI function".

The researchers' letter is lent weight because it comes from a globally recognised scientific expert on gut health – the renowned Glenn Gibson, Professor of Food Microbiology and Head of Food Microbial Sciences Unit – with his colleagues Bob Rastall, Professor of Biotechnology and Head of Department of Food and Nutritional Sciences and Ian Rowland, Professor of Human Nutrition and Head of Nutrition Research Group at Reading University.

Most tellingly of all, the researchers write: "We cannot understand the panel's statement on bifidobacteria and health. It seems to ignore a large body of published data."

They point out that their view is supported by 150 research projects over 20 years in the prebiotic area, concluding that: "Although it could be argued that these studies alone do not necessarily indicate causality, when combined with the results of trials in human subjects and animals supplemented with live bifidobacteria they do indeed provide compelling evidence that the relationship between intestinal bifidobacteria and health is causal."

They said EFSA's position threatens Europe's leading academic research position

in the area: "Should such ill-informed and badly-researched conclusions be reached as is the case with the EFSA judgment made here, then we fear for the future of this research in the EU."

"We can foresee a situation whereby major sponsors will concentrate their efforts outside of Europe – for example North America and Asia where government agencies, scientists and industry seem to working together in a much more transparent, informed and constructive manner than in Europe. Ultimately, European consumers will lose out on a critical area of public health."

In an ideal world, sooner or later Europe's health claims system must collapse under the weight of its own contradictions. But that might still take years, and while we are waiting innovation and health science in Europe might be killed off.

A CALL TO ACTION

Industry is taking too timid a view of what to do. Many companies are in the process of changing labels and marketing campaigns so that their products will comply with the new, ultra-restrictive claims regime by the middle of 2010. That is an unavoidable necessary step.

Many companies are "waiting to see" whether the EC committees that ratify EFSA's opinions might not take a kinder view. That is a foolish policy that tackles the symptoms, rather than the root cause of the problem, which is that Europe's health claims regime is badly designed, badly implemented and badly executed.

What we need are more companies with the *cocones* of Red Bull, the energy drink giant, which said that the recent rejection of taurine-based energy health claims by EFSA won't have any bearing on its own claim-making.

EFSA's Panel on Dietetic Products, Nutrition and Allergies (NDA) found causality had not been demonstrated between taurine, once extracted from bull bile but now made synthetically, and boosted energy levels.

Taurine, Red Bull points out, is just one of a number of energy-giving ingredients in its product.

In short, we are fast coming to the point where Europe's health claims system needs a massive – and ideally collective – challenge from industry, in the courts if necessary.

In the meantime industry needs to fund a communications body that tackles each and every piece of disinformation and misinterpretation that is now appearing in the consumer media, writing individually to each and every journalist who publishes an article to provide correct information and an alternative to the opinions of almighty EFSA.

Unless we do that, then the only message that the consumer will hear is that our industry has been making fraudulent claims for years, claims now “rejected by EU scientists” as one newspaper recently said. And that will inflict a level of damage on the public's trust in the food industry which could have repercussions far wider than we can imagine.

WHAT DO THE NEXT TWO YEARS HOLD?

As it currently stands, the outcome of the EU health claims regulation process will be that:

1. Small companies will flee from using health messages of any kind – hardly a benefit to Europe's consumers – rather than entangle themselves in the nightmare of the health claims system
2. This will leave only a few large companies to innovate in health. Only they have the financial muscle to create the science at the pharmaceutical level that EFSA is looking for.
3. The main winners from the EU's new health claims regulation will be PR companies, who food manufacturers will turn to for help in finding ways of getting their message into the media without using an overt claim.
4. Europe will slide from being a leader in health innovation to an also-ran.
5. Sooner or later the food industry will be forced to mount a legal challenge to the regulation. But given the agonisingly slow processes of the EU, that challenge could spend years in the courts.

Europe has become a place of contradictions – and the lobbyists who want to stop health claims of any kind have succeeded. It will be a place where a face

MARS UNDETERRED BY PROBIOTIC CLAIM PROBLEMS

With the probiotics industry seemingly riding on a one way ticket to health claims Armageddon, you'd be forgiven for thinking now would be a terrible time to launch a new probiotic shot. This doesn't appear to have been a concern for Mars UK, however, which has waded into the category with a Galaxy chocolate flavour active mini milk drink.

According to UK trade publication *The Grocer*, Mars is targeting sales of 10% of the £220 million (\$359 million/€241 million) UK dairy shots market within the next few years. “The category is flat, with sales up 1% and volume down 2%, so retailers have been looking to liven things up,” consumer drinks chief Michelle Frost told the magazine. “They are excited by the launch as everything on the market is yoghurt and fruit-flavoured.”

This was the first chocolate flavour shot, she added. “All the drinks out there are focused on the functional benefits, but with our new product you can get probiotics as well as Galaxy chocolate in 68 calories,” she said, adding that Mars' debut would attract new people to the category. It would also open up usage occasions beyond breakfast, she said. “It will attract those who aren't that bothered by probiotics but like the idea of a guilt-free bit of chocolate.”

If the Galaxy shot launch was successful, Mars would launch shot variants of some of its other chocolate brands, said Frost. “If this takes off it could revolutionise the market,” she said. “Once we have established this category, within one or two years we will look at other brands. If we have rip-roaring sales then we will pull out all the stops and move quickly.”

The Grocer also reported that the launch, which had been in the pipeline for two years, would be supported by a TV campaign breaking in mid-November on breakfast TV, as well as in-store activity and a £2 (\$3.26/€2.19) trial price (normal price £2.89/\$4.71/€3.17). The advert's strapline would be ‘Real Galaxy chocolate in a probiotic shot. What a delicious idea’. The campaign would focus on the indulgence of Galaxy rather than “the typical bug message”, Frost said.



cream can claim that it makes your skin healthier, with almost no science to support it, but a yoghurt can't tell you that it contains bacteria to support your digestive system, even though the science is a hundred-fold that of some face-creams.

It will be a place where fast-food chains can spend hundreds of millions advertising products that contain higher levels of saturated fats and salt than are good for you, but you can't tell someone that cranberry juice contains anthocyanins and what the specific benefits of cranberry juice are in terms of fighting urinary tract infections, because EFSA thinks the scientific evidence that was good enough for Harvard Medical School is not good enough for EFSA.

At the time of its adoption in 2006, Markos Kyprianou, the then European Commissioner for Health and Consumer Protection, was quoted as saying: “The health and nutrition claims regulation will allow EU consumers to be fully aware of what they are eating. They can no longer be duped by false or confusing assertions on food labels.”

What the Commissioner did not envisage was that far from protecting the consumer against false claims, the health claims regime eliminates scientifically well-founded information that helps people to a healthier diet and, by kicking out anything that does not match EFSA's beliefs, it obstructs rather than facilitates healthy food choices.

Second wind for UK energy shots market as big boys wade in

The EU's ill-conceived and worse-executed health claims regime may be causing health brands to suspend innovation and withdraw marketing, but it's proving no barrier to an explosion of activity in the market for "daily dose" energy drinks. Big brands Coca-Cola, GSK and others are racing to get a slice of a UK energy shots market that has rocketed from almost zero to over £40 million (\$65.3 million/€43.9 million) in the space of just over a year. By RICHARD CLARKE.

Competition in the UK's energy shots market is heating up after the three main energy drink players – Coca Cola, Red Bull and GlaxoSmithKline (GSK) – launched new products into the category.

All three products are extensions of existing energy drink brands. Coca Cola has launched 50ml Relentless Shots; Red Bull has unveiled 60ml Red Bull Energy Shots; and GSK has developed 60ml Lucozade Alert Plus shots.

All three were launched in the space of

just over two months between the end of July and the beginning of October. The proximity of the launches was no coincidence. Far from being innovators, this was a case of three major players moving quickly to follow smaller, obscure rivals into what is new territory for the UK grocery market.

Earlier this year, *New Nutrition Business* reported on the launches of two new energy shots into the UK – American brand Quick Energy and Danish offering Powershot (see *MNB* May 2009). The companies told us they

believed energy shots were the next big thing, primarily because many consumers wanted a functional energy hit without having to drink a long, fizzy beverage loaded with sugar.

These companies were pioneers, who believed they could replicate in the UK the success of energy shots in the US, where category sales are expected to double year-on-year to \$700 million (€471 million) in 2009, according to IRI estimates. Whether their belief is correct remains to be seen. But, having seen niche operators paving the way for them, it's clear that Coca Cola, Red Bull and GSK agree with their vision of the future.

It's tempting to think these three large companies are launching shots at least in part to protect their existing sales from a dangerous new rival proposition. If consumers are so desirous of energy shots, it stands to reason that many may abandon energy drinks for them. The UK's energy drinks market grew 5.8% year on year to £535 million (\$873 million/€587 million) in the 12 months to 5 July, according to Nielsen, so there is a lot at stake.

But it would be over-simplifying things to suggest this is simply a case of defence being the best form of attack. There is, among these leading suppliers of beverages, a distinct feeling that energy shots will appeal not just to existing energy drink consumers but to new consumers, too.

COCA COLA, GSK ANTICIPATE BOOST IN SALES, VALUE

The first of the trio to launch an energy shot was Coca Cola, whose Relentless energy drink brand, launched back in February 2006, was worth £45 million (\$73 million/€49 million) in the year to 27 June 2009, according to Nielsen.

Introduced in July this year, the Relentless energy shot provides the same amount of



energy as 250ml of the Relentless drink (which sells in 500ml cans). It contains 80mg of caffeine and vitamins B6 and B12 and retails for about £1.69 (\$2.76/€1.85).

“The energy shot moves away from the refreshing, longer drink commonly found with energy to the immediately consumed, big energy hit that consumers require,” says Dave Leslie, brand manager for Relentless. “Essentially, the functional nature of shots has a much wider appeal to a bigger audience. Following the huge success of energy shots in the US we are confident this launch will drive penetration and the overall result should be increased sales and value driven into the energy sector.”

Rival GSK believes the UK’s energy shots market will be worth £114 million (\$186 million/€125 million) a year by 2013, and is confident Lucozade Alert Plus, launched at the end of September, will represent a big chunk of those sales.

Like Relentless, the 60ml orange-flavoured Lucozade Alert Plus shot contains caffeine and B vitamins as active ingredients. Curiously it also contains ginseng and guarana but not for their reputed health benefits. “These are only added to make it taste good,” says the company. The shot has no added sugar and just two calories, and carries a recommended price point of £1.49 (\$2.43/€1.63).

GSK, whose Lucozade brand as a whole was worth £343 million (\$560 million/€376 million) in 2008, up 2.8%



Red Bull launched its energy shot in the UK at the beginning of October, following the launch of its US energy shot (pictured) some months earlier.

year on year according to Nielsen data, says Lucozade Alert Plus shot “can help mental performance, focus, memory and alertness”.

It is “designed for people who are looking for a fast-acting addition to their energy purchase and are in need of a portable mental boost.” It will particularly appeal to students and people at work or on-the-go, the company says.

According to Mark Sterratt, category controller at GSK, the presence of major brands in the energy shots space will make the category mainstream. “The energy shots category is a category for the future,” he says. “The format and functionality of energy shots meet the needs of current and future soft drinks customers and presents a massive sales opportunity for retailers. The presence of trusted brands such as Lucozade in the energy shots market will rapidly accelerate consumer awareness and demand for energy shots and drive overall category growth.”

His colleague, brand manager Alex Saunders, adds: “The shot has been specifically developed for the UK market. Lucozade Alert Plus has undergone considerable consumer testing – both qualitative and quantitative – in the UK to

ensure that the concept, usage occasions and taste fit with consumer demands. In addition to this, Lucozade is an essentially British brand with considerable heritage and expertise in the UK market that it is able to apply to this launch.”

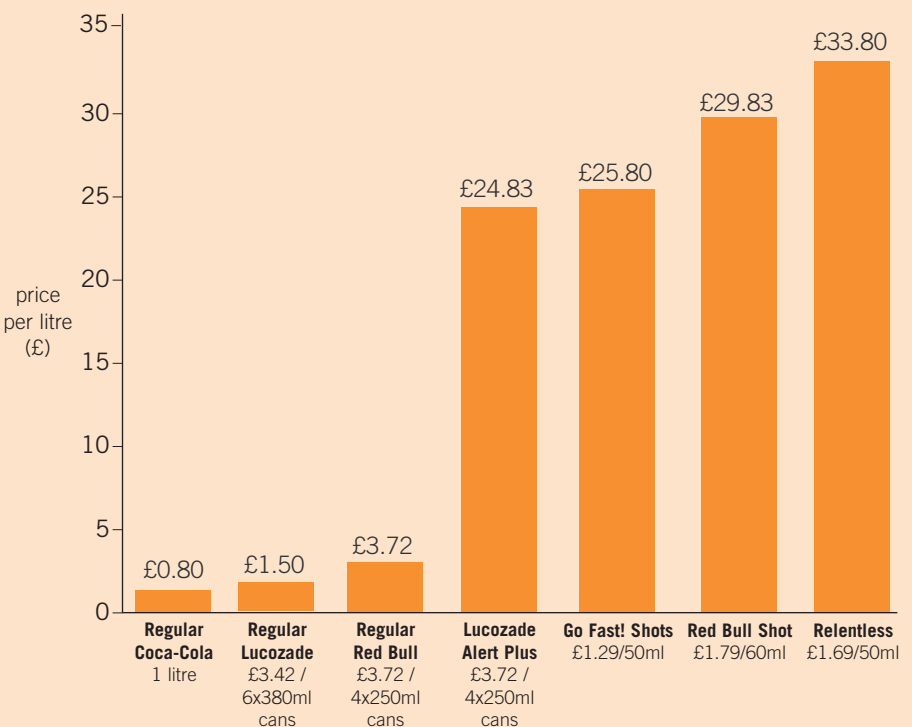
AMBIENT SHOTS WILL DRAW MORE CONSUMERS, RED BULL BELIEVES

The last to join the party was Red Bull, whose own energy shot product was announced in the UK at the beginning of October, having already been launched in the US some months earlier (see *NMB* May 2009). Retailing at £1.79 (\$2.92/€1.96), the product offers the same amount of energy as a 250ml can of Red Bull. The Red Bull brand was worth £182 million (\$297 million/€200 million) in the UK in 2008, according to Nielsen, registering growth of 8.7% year on year.

“We are the most recognised energy brand in the world and this will be one of the most distinct energy products on the market,” Red Bull head of off-trade Matt Hollier told *The Grocer* magazine. “There are still lots of people who don’t engage with energy

CHART 1: ENERGY SHOTS - THE NEW SUPER-PREMIUM CATEGORY

The bar chart compares the prices of new energy shots with “regular” energy drinks and with regular Coca-Cola. Prices are shown as a price per litre equivalent.



Source: NNB supermarket survey at Tesco and other outlets.

drinks at all for various reasons, whether it's formulations or the amount of liquid. There are also customers who will go into a store and not go near the soft drinks chiller. But with this being ambient it gives another opportunity for customers to pick it up."

Energy drinks, of course, are ambient too. But to be enjoyed at their best they require chilling. The point Hollier is making is that a shot doesn't require chilling because it is not being consumed as a beverage. Once the cap is open, the liquid will barely make contact with the consumer's taste buds.

POSITION IS EVERYTHING

In their marketing material, there is a great deal of emphasis placed by all three companies on the correct positioning of their energy shots in store. This is in part because energy shots are a new concept and consumers will not necessarily go to a shop looking for them. But it also reflects the fact that energy shots are viewed by the suppliers as the sort of product that will sell well through smaller, convenience stores. These are, essentially, products people buy on impulse if they are feeling jaded; they are not necessarily something they pop into their trolley while doing the weekly shopping.



In a convenience store, GSK recommends its shots are placed at either: the till point to capitalise on impulse purchases; by the confectionery aisle because this is where people often head for a pick-me-up; near newspapers and magazines on the basis that about a quarter of people go into c-stores to buy these; or by soft drinks, on the basis that one in every four soft drinks sold in a c-store is an energy drink. GSK has developed shelf-ready packaging such as clip-strips to help merchandising in different parts of the store. "We expect the distinctive bottle to draw attention from consumers at till sites in on-the-go environments such as convenience stores and forecourts, as well as in major supermarkets," says GSK's Saunders.

Coca-Cola's Leslie echoes these sentiments in relation to Relentless shots. "Proximity to other impulse categories in store is key to ensure success of this launch," he says. "Till-point merchandising is vitally important to capture impulse sales."

Coca Cola and GSK have pledged to back their energy shots with major marketing campaigns. Relentless shots will benefit from a "multi million pound marketing spend" that will include advertising, PR and nationwide sampling. Billboard advertising, including along motorways, will be used in a bid to reach as many consumers as possible. Coca Cola claims: "In 2009 alone, the Relentless [shots] media plan will reach 78% of its target market an average of 30 times."

Red Bull's marketing plans are unknown,

but GSK says it will spend £6 million (\$9.8 million/€6.6 million) marketing its Lucozade Alert Plus shots, in a campaign featuring TV and outdoor advertising, sampling and PR and employing the strapline "Sharpen up, fast".

GSK says it will also be sending its sales force out to visit thousands of independent retailers throughout the UK "to educate them on the energy shots category and ensure they understand the benefits of stocking up on Lucozade Alert Plus." Interestingly, the company will also be undertaking sampling in wholesale depots to persuade retailers of the benefits of the product.

LITTLE GUYS FIGHT FOR SPOT IN UK MARKET

Just because the big boys are now trying to take the ball away, it isn't stopping smaller companies attempting to secure a slice of the UK's energy shots market. Denver-based Go Fast! Sports & Beverage Co has just launched its eponymous Go Fast! Energy Shot into the UK market with an all-natural, value-for-money proposition.

Priced at between £1 and £1.29 (\$1.63-\$2.11/€1.10-€1.42), the shots are designed to "attract new consumers that are currently not served by the energy drinks category". The shot is described as a "bio energy" shot that "plugs a gap in the existing market for a high-quality, value proposition that fits into the pockets and lifestyles of the busy adult

population". It features "a unique blend of herbal ingredients and a low-GI, fruit-based sugar compound for a fast-acting, sustained energy lift with only five calories".

Kris Yule, UK director of Go Fast! Sports, which also markets an energy drink, says: "The herbal blend in Go Fast! is made up of ginseng, guarana and ginkgo biloba – all natural ingredients that have a proven energy benefit. Combined with fruit sugars, B vitamins, amino acids and caffeine, the shot delivers an energy boost that can last for hours. The Go Fast! Energy Shot, like our energy drink, is a top-quality product at a reasonable price. Retailers should expect some exciting new revenue opportunities as the category develops. Evidence from

the US shows that the energy shot has the potential to reach a much wider consumer demographic than typical canned energy drinks."

"People who have been turned off by the taste, name or image of an energy drink, health conscious individuals who are watching their calorie intake, particularly women, are all receptive to the shot proposition."

The focus on value for money by Go Fast! gets to the heart of why energy shots, and energy in general, is an attractive space for companies to play in. Even at £1-£1.29, Go Fast! Shots are relatively expensive for 50ml of liquid. This compares with £1.49/60ml for Lucozade Alert Plus, £1.69/50ml for

Relentless and £1.79/60ml for Red Bull.

Energy shots are expensive, but then so are energy drinks, and this has not been an impediment to their success in the UK. In fact, the energy category is a classic case study that illustrates the argument put forward previously by *New Nutrition Business* that functional foods which offer benefits consumers can feel will thrive even in the face of economic adversity.

Energy shots will no doubt sell. The question for the likes of GSK, Coca Cola and Red Bull is: will they really bring in new consumers to the energy category, or will they simply cannibalise sales of energy drinks? For now, the jury is out.

SUMMARY OF THIS ARTICLE

The EU's ill-conceived and worse-executed health claims regime may be causing health brands to suspend innovation and withdraw marketing, but it's proving no barrier to an explosion of activity in the market for "daily dose" energy drinks.

- Coca Cola, Red Bull and GlaxoSmithKline (GSK) all launched new 50ml-60ml energy shot products in the months between July and October. The proximity of the launches was no coincidence. Far from being innovators, this was a case of major players moving quickly to follow smaller, obscure rivals – such as category pioneers Quick Energy and Powershot – into what is new territory.
- According to Mark Sterratt, category controller at GSK: "The energy shots category is a category for the future. The format and functionality of energy shots meet the needs of current and future soft drinks customers and presents a massive sales opportunity for retailers."
- All three companies emphasise the correct positioning of their products in store. This is in part because energy shots are a new concept and consumers will not necessarily go to a shop looking for them. But it also reflects the fact that energy shots are viewed as the sort of product that will sell well through convenience stores. These are, essentially, products people buy on impulse if they are feeling jaded; they are not necessarily something they buy as part of the weekly shop.
- In a convenience store, GSK recommends its shots are placed either: at the cash-register, to capitalise on impulse purchases; by the confectionery aisle because this is where people often head for a pick-me-up; near newspapers and magazines on the basis that about a quarter of people go into c-stores to buy these; or by soft drinks, on the basis that one in every four soft drinks sold in a c-store is an energy drink. GSK has developed shelf-ready packaging such as clip-strips to help merchandising in different parts of the store.
- The shots are super-premium products – when compared on a price per litre basis (see bar chart) – but the premium has been no barrier to their becoming a huge success in the US, despite economic recession.
- Shots are designed to attract new consumers that are currently not served by the energy drinks category: people who have been turned off by the taste, name or image of an energy drink, health-conscious individuals who are watching their calorie intake, particularly women, are all receptive to the shot proposition.
- **UK energy drinks market:** £535 million (\$873 million/€587 million), growth of 5.8%.
- **UK energy shots market:** £40 million (\$65.3 million/€43.9 million).
- **US energy shots market:** Sales expected to double year-on-year to \$700 million (€471 million).
- **Coca Cola Relentless:** Brand worth £45 million (\$73 million/€49 million).
- **GSK Lucozade:** Brand worth £343 million (\$560 million/€376 million), growth of 2.8%.
- **Lucozade Alert Plus:** Marketing spend £6 million (\$9.8 million/€6.6 million)
- **Red Bull:** Brand worth £182 million (\$297 million/€200 million) in the UK, growth of 8.7%.

Low GI enters the sweetener war

A low glycemic-index sugar – made by returning extracts of molasses to cane sugar to make its release into the body slower – has enjoyed a good reception so far in its home market of Australia. But Australia is where GI originated and consumers there are highly aware of the concept. Will plans to take the sugar global fare so well in regions where consumers will need educating about GI? By RICHARD CLARKE.

The battle for the sweeteners market has traditionally been a contest between sugar and low/zero calorie substitutes. But now a new 'low Glycemic Index' cane sugar called LoGiCane is set to shake things up.

Marketed by Horizon Science, LoGiCane is a conventional cane sugar that has been treated with an extract of molasses, a by-product of sugar processing that is usually thrown away or burnt. This extract contains high levels of polyphenols which, when consumed at the same time as sugar, are said to make the body release the sugar into the blood stream more slowly than is usually the case.

Horizon has managed to re-combine these polyphenols with sugar by turning the molasses extract into a syrup that is sprayed directly onto the sugar, all using patented technology. The resulting product, LoGiCane, has a GI rating of 50 – considered low under the GI system – compared with a rating of 65 for ordinary white sugar, which is classed as medium to high.

LoGiCane – its name an amalgam of 'low GI cane sugar' – can be used one-to-one in place of standard sugar, says Horizon, and is completely natural because it still contains only what was in the original sugar cane plant before processing.

The glycemic index (GI) ranks carbohydrates according to their effect on blood glucose levels. Carbohydrates with a low GI (55 or less) are believed to make the body's blood glucose rise slowly and fall gently over a longer time. Carbohydrates with a high GI (over 70) are digested quickly, causing blood glucose levels to surge and then crash.

Fans of the GI regime say it helps with weight management because when energy is released more slowly into the blood stream, the consumer stays satiated for longer. It is also considered beneficial to diabetics. The

concept has given rise to the GI diet, which has become widely used in some parts of the world.

LOW GI GARNERS GOOD PRESS

One market where the GI diet has gained particularly strong mainstream acceptance is Australia, which also happens to be where Horizon is based. It is here that LoGiCane has made its debut in a co-branding agreement between Horizon and Sugar Australia, which markets the CSR range of sugar products. CSR LoGiCane was launched in Canberra on 16 March this year, amid a blaze of publicity driven by a big-budget, high profile advertising programme, devised and funded by Sugar Australia.

This was complemented by an expertly executed PR campaign run by Horizon, whose marketers managed to generate prime-time TV news coverage for the launch of LoGiCane featuring supportive comments from key opinion informers. They included Professor Jennie Brand-Miller, an

Australian nutritionist who has been at the forefront of the GI movement and who is a household name in her home country, and Dr Alan Barclay, the chief scientific officer of the influential Australian Glycemic Index Foundation.

The remarkable thing about these endorsements was that they cost Horizon nothing. "LoGiCane was endorsed gratis because they saw the benefits of the product," says Ashok Dhanrajgir, president and CEO of Horizon. "With these individuals on board, it was fairly easy to leverage that and we got good press."

It's clear that by launching in its home market, Melbourne-based Horizon gave itself the best possible start. "Low GI is very popular in Australia," says Dhanrajgir, "so there was not much education needed in terms of communicating the business proposition and the benefits to the consumer. Most of the big multinational food companies have low GI endorsements."

Specifically, by "endorsements" Dhanrajgir means the GI Foundation 'Symbol'. In Australia, the Foundation tests products claimed to be low GI and, if this status is proven, they are permitted to carry its symbol. LoGiCane succeeded in winning the right to carry this logo, something Dhanrajgir says has been vital to the success of the product.

"The GI label on your product has great value. It creates so much more impact in terms of penetration. It wasn't a *fait accompli*. The GI Foundation, in conjunction with the University of Sydney, do their own independent verifications of products they are asked to endorse. But they were extremely enthusiastic."

If getting the GI Foundation Symbol on pack was important, then so too was the decision to co-brand with Sugar Australia's CSR brand because it was already well known in the marketplace, says Dhanrajgir.



“LoGiCane is a new brand and we wanted to leverage a household name.”

The GI Foundation Symbol is carried prominently on the front of pack, where LoGiCane is described as “Low GI Cane Sugar”. The pack also carries a logo stating “Better For You” and two flashes indicating that the product is “100% Natural” and offers “Longer Lasting Energy”.

On the side of the pack, text reads:

“CSR LoGiCane Low GI Sugar from the CSR Better for You range is made from 100% sugar cane. We’ve retained more of the goodness found in molasses to create a great tasting cane sugar that provides a slower and more sustained energy release. Perfect for all your everyday sweetening needs.”

Elsewhere, the pack indicates that LoGiCane has a GI of 50, which is described as low. An explanation reads: “*The Glycemic Index is a ranking of carbohydrates according to their effect on blood glucose levels.*” The pack also suggests a recipe for blueberry muffins, using LoGiCane instead of conventional sugar.

Available in 375g and 750g packs, the retail price of LoGiCane is typically about double that of standard sugar, which Dhanrajgir says has not proven off-putting to Australian shoppers even during these difficult times. “Although it’s double the price, we are talking from a dollar to two dollars,

not 50 dollars to 100 dollars,” he says. “It’s not a barrier to purchase.”

The premium is justified, he argues. “A lot of R&D has gone into this,” he says, although he won’t reveal just how much has been invested in developing LoGiCane over the years, admitting only it has been “many millions”.

Ambitiously, Dhanrajgir even believes there will be scope for increasing the price further. “The whole strategy is that if we can strengthen claims and add more science to the product we’ll certainly have the opportunity to do that in the end,” he says. “We are always researching how to increase the low GI component, or possibly create a hybrid sugar. Today LoGiCane has the same calorific content as any normal sugar. We are not a low calorie sugar. However, if there is a possibility of combining low GI with low calorie – my goodness!”

Target consumers for LoGiCane are divided into two groups, according to Horizon:

- Primary: the main grocery buyer who is interested in healthier food options for herself and/or her family.
- Secondary: diabetics who are currently either not consuming sugar or sweeteners or who are now only consuming artificial sweeteners.

Sales since launch have exceeded expectations, says Dhanrajgir. LoGiCane is sold nationwide in Australian supermarket chains Coles and Woolworths and has been selling at a rate of 18 to 20 packs per store per week. Expectations for a speciality product of this nature, carrying such a significant price premium, would normally be around the 12 packs per store per week mark, says Dhanrajgir.

INDUSTRY HOLDS GROWTH OPPORTUNITIES

With the Australian market yielding good results, Horizon is beginning to look further

Enjoy the trusted taste of CSR

Sugar just got better with CSR’s Better For You sugar range. Look out for the other products within the range:

CSR Organic Sugar.

Golden raw sugar made from organically grown sugar cane and certified by Australian Certified Organic. CSR Organic sugar can be used wherever you would use white or raw sugar.

CSR Smart™ Sugar is a blend of natural sugar and sweetener. It has 50% less calories - twice as sweet so you use half as much. Enjoy it daily for all your sweetening needs.

How does LoGiCane® compare with white sugar?

Component	Low GI Sugar Range	White Sugar (Comparison)
Sucrose (%)	98.8 – 99.2	99.6 – 99.7
Polyphenols (mg CE/100g)	25 – 40	0
Antioxidant (mg GAE/100g)	6 – 12	0
Organic Acids (mg/100g)	22 – 32	0
Potassium (mg/kg)	300 – 400	0
Calcium (mg/kg)	180 – 380	0
Magnesium (mg/kg)	20 – 50	0
Sodium (mg/kg)	20 – 32	0
Colour (ICUMSA)	800 – 1350	< 200
Glycemic Index	50 +/- 5	65 – 70

afield. What the company has achieved so far is merely “the tip of the iceberg”, says Dhanrajgir. “The bigger opportunity commercially for us is business to business and the industrial market. The opportunity to have LoGiCane in a Coca Cola is where we want to go. And that’s the next stage of our collaboration with Sugar Australia and the international partners we are talking with.”

Dhanrajgir says Horizon is six to 12 months away from launching LoGiCane into the Australian market as an ingredient. Right now, the company is working on “product application, stability, colouring, taste profile and sensory issues”, he says.

There are plans, too, to extend the reach of the tabletop version of LoGiCane. A launch is planned for neighbouring New

Zealand in the fourth quarter of 2009, says Dhanrajgir, while a deal is imminent in the US. A launch in Europe is a little further off, he says. “We are in preliminary discussions. We are not in a tearing hurry because we are selective and we want to get into long term commitments with the right partner.”

Arrangements abroad will mirror the deal with Sugar Australia, in that the rights to manufacture LoGiCane and market the brand either as a tabletop product or an ingredient will be licensed to a local sugar processor. But the ingredients sector will be the opportunity companies will be keenest to exploit, says Dhanrajgir. “The main strategic driver for these companies is not retail.

Retail is nice to have but it’s what we can do industrially that counts.”

Exporting the LoGiCane brand may be straightforward, but what about the GI concept, which has had mixed success outside of Australia? Dhanrajgir says that where necessary, more focus will be placed on the product and its benefits rather than its GI status.

“For me, it’s nomenclature,” he says. “Call it what you will: GI in Australia; postprandial [post-eating] peaks in Europe. This product has compelling benefits to the end user. LoGiCane reduces the spikes in blood glucose levels, it maintains them at a constant manageable level and as a result of that it delays the onset of hunger. These are compelling selling points. We would like to talk universally about the benefits of LoGiCane rather than tagging it.”

CHALLENGES OF GOING GLOBAL

Horizon Science is majority-owned by two venture capital groups – Inventages of Switzerland and BioPacificVentures of New Zealand. It was their backing, in 2006, that enabled Horizon to develop the technology that separates from the molasses the polyphenols that give LoGiCane its special qualities. The two companies have invested a combined AUS\$14 million (\$12.7 million/€8.6 million) in Horizon, which is also working on developing a number of other functional ingredients derived from sugar cane.

The first priority, however, is to globalise LoGiCane. Erich Sieber, investment director at Inventages, says the experience with LoGiCane so far in Australia demonstrates that the concept can work, though he also concedes the Australian market is a benign environment because the population there is so receptive to the GI concept. Of the wider opportunities, he says: “It’s mainly the Anglo-Saxon markets that know the GI concept. The US and the UK are natural target markets for us. The Western Europeans and South Americans don’t know the concept, so that’s where the challenge is.”

But Sieber also contends that the GI diet is gaining credibility globally. “For the consumer it is a very simple concept,” he says. “More and more people are saying: maybe it’s not perfect but it’s the best diet you can have. As long as you eat low GI foods and avoid high GI foods overall, you will be healthier.”

Because of the simplicity of the concept, Sieber thinks there are markets which can be “educated quite fast” about the benefits of LoGiCane. These include “the entire Middle East, which has up to 60% diabetes”, and India, where he says people eat a sweet diet but are “open to new concepts”.

LoGiCane will also appeal to consumers who want a healthier option to sugar but prefer to avoid artificial sweeteners, Sieber says, as well as those who are not willing to compromise on taste by consuming natural sugar alternatives, such as Stevia, whose star is rising rapidly since it was Generally Recognised as Safe (GRAS) in the US.

Whether LoGiCane will require similar such approval in the US, and indeed Europe, is a moot point. Sieber is of the opinion generally that LoGiCane should be considered no different from ordinary sugar from a regulatory standpoint because it contains nothing that was not already in the sugar cane before processing. But he admits, too, that he is not particularly well versed in this area.

Ashok Dhanrajgir, Horizon’s CEO, offers little more in the way of enlightenment on this subject. Asked whether LoGiCane will require GRAS approval in the US he replies: “We haven’t crossed that bridge yet and this is the discussion we are having with our potential partner in the US.” Gaining GRAS status might prove to be “the pathway to least resistance and the most consumer acceptance,” he concedes.

Regarding whether Novel Foods approval will be required in Europe, he adds: “I suspect you might not [need it] because you could just register it as a sugar.” This has been the experience in Australia, he says.

Separately, Horizon appears to have made no start yet to gaining approval under the EU Nutrition & Health Claims Regulation for any health claims that might be made for LoGiCane. This may be essential, as any programme to educate European consumers about the benefits of the product would probably be difficult without such approval.

This is just one of the hurdles Horizon must overcome to make LoGiCane a global success. For Sieber, however, the Australian experience is enough reason for confidence. “We have proven we can produce it, we can distribute it and we can sell it at a premium over sucrose,” he says. “And after six months it is still selling above expectations. The challenge now is to make this a global product.”

Strategy rethink boosts oral health probiotic

Probiotic company BLIS Technologies has recovered from a shaky start with a dramatic rethink of its marketing strategy. With new products in the pipeline and new markets in its sights – an anti-caries probiotic product has just debuted in America – it seems the company's willingness to change has been rewarded. By RICHARD CLARKE.

BLIS Technologies, the New Zealand company behind an innovative anti-sore throat probiotic called K12, says it expects revenues to double this year in the wake of a change in strategic direction.

The Dunedin-based outfit expects growing sales in its home market and penetration into the massive US retail sector – starting with a 50-store trial with the warehouse club chain Costco, the fifth-largest general retailer in the US – to help increase turnover from NZ\$1.2 million (\$880,000/€600,000) in the 2008/09 financial year to as much as NZ\$3 million (\$2.2 million/€1.5 million) in the current one. Business is also set to receive a boost thanks to the launch of a new probiotic called M18, closely related to K12, which is said to offer benefits to dental health.

This probiotic, specifically developed for the prevention of tooth decay, has made its debut as a kids' oral care product from US dietary supplement manufacturer Nature's Plus. Animal Parade Tooth Fairy was launched to coincide with the start of the

new school year in early September.

But the future hasn't always looked so rosy for BLIS. The company was established in 2000 when a scientist from the University of Otago, John Tagg, persuaded an entrepreneur, the now-deceased Howard Paterson, to invest in the commercialisation of a probiotic strain he had recently discovered.

The bacteria – called *Streptococcus salivarius* – was found in the mouth of a young boy Tagg had been monitoring. The special thing about this boy was that he was highly resistant to winter sicknesses such as seasonal flu, coughs and colds.

While *Streptococcus salivarius* is a bacteria found in all of us, this boy had a particular variant of the organism, which Tagg dubbed *Streptococcus salivarius* K12. Tests subsequently showed that K12 had an ability to secrete an antibacterial substance that killed off the pathogens in the mouth that caused illnesses such as sore throats.

Paterson was convinced of its commercial

merits, and established BLIS – an acronym of the words 'Bacteriocin-like inhibitory substance'. The following year, in 2001, BLIS was listed on the New Zealand stock exchange. By 2002 the company had launched its first product, Throat Guard, into the pharmacy sector. Backed with an expensive TV and print advertising campaign, the product was positioned as a supplement designed to help prevent catching sore throats and winter chills.

But sales disappointed. "The reality was that there was a lot of money spent for relatively small returns," says Grant Washington-Smith, who is business development and marketing manager at BLIS. Washington-Smith explains that while there was no doubt K12 was effective, there were two major problems with the Throat Guard concept at that time:

- **Delivery:** to colonise K12 in the mouth, consumers had to swish a mouthwash as a pre-treatment to prepare the mouth for inoculation, and then – two hours later – sucking a K12-fortified lozenge. What made this delivery method cumbersome was that users had to go through this procedure not once but three times a day. "It was a very, very laborious process," says Washington-Smith.
- **Regulatory restrictions:** under New Zealand law, it was not permitted to make structure function claims for probiotics. This meant BLIS was unable to explicitly discuss the benefits of K12 in its advertising. To exacerbate this, back in 2002 probiotics were not a widely understood concept among New Zealanders, though that has changed now. Unable to explain the benefits of Throat Guard explicitly, BLIS resorted to creating adverts that depicted cartoon 'good guys' using K12 bacteria to battle against bad bacteria in the mouth.



It is Washington-Smith's view that Paterson took BLIS K12 to market a little too early. "My sense was that, at the time, it was really an R&D project," he says. "They had a lot of work to do and it's only been in the last few years, since 2006, that BLIS has really cracked the nut around issues of colonising [the mouth with K12] without having to use a mouthwash as a pre-treatment three times a day. Now we can colonise just by sucking one lozenge a day."

REGULATORY CHALLENGES PROMPT CHANGE OF STRATEGY

Not only has BLIS "cracked the nut" in terms of product delivery, the company has also switched its focus in terms of commercial strategy. "From 2002 to 2006 BLIS thought it could be a fully-integrated biotechnology company," says Washington-Smith. "They would take the New Zealand retail model and replicate it around the world. What they didn't anticipate were the regulatory requirements and the cost of compliance. These were major obstacles for them. There were problems, a never-ending barrage of regulatory approvals, especially in the EU."

There was also a general lack of enthusiasm for the Throat Guard concept globally. "We actually had very little uptake abroad," says Washington-Smith. In Europe, there were failed efforts to launch in Spain and Germany. The one notable success was in Ireland where a pharmacy chain agreed to stock the product. It still does, although Washington-Smith says: "We don't get a lot of repeat orders from them, that's for sure."

In 2006, three years after Paterson's death, a new chief executive joined BLIS,

Dr Barry Richardson. "Barry has a track record of exporting value-added ingredients into the food sector around the world," says Washington-Smith. "Barry had this vision – which was also mine – of retaining the New Zealand market as a place to test new ideas, test new delivery systems and play around with the whole retail concept, but then market the branded ingredient on an industrial basis to various countries, starting with the US and then migrating that through to the Asian market and finally into Europe as regulatory issues allowed us. That's our strategy today – to develop branded ingredients." And this strategy has been declared a success. In July, Richardson told shareholders retail sales in New Zealand had doubled and that "significant sales momentum" had been gained in the US.

Future prospects in the pipeline also offer cause for optimism. BLIS has an ongoing licensing and option agreement with Nestlé Nutrition, which currently holds exclusive rights to use K12 in infant formula products. Nestlé is researching how K12 may help to inoculate very young children against pathogens from birth.

In June this year, BLIS entered into a contract with "another major international consumer products company". The details remain confidential, but BLIS says the deal "resulted in a payment to the company of a substantial sum to enable BLIS to undertake

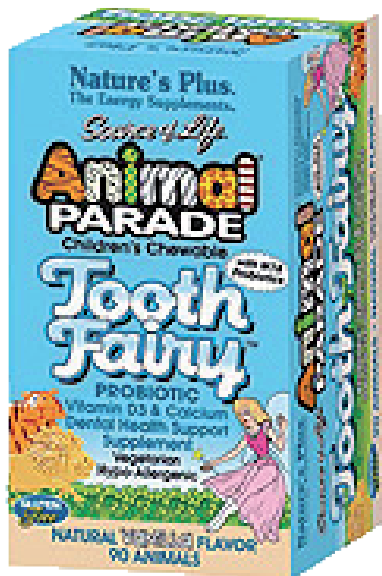
specific work over the coming months with a view to eventually bringing further BLIS products to the retail market in specific applications."

Meanwhile, in spite of its focus on licensing K12 as an ingredient – which is underpinned by a global distribution agreement with Frutarom – BLIS has made further inroads in the sale of its finished products, too. Regulatory approvals are being sought in both China and Korea, where the company has struck distribution and marketing agreements with local firms for Throat Guard lozenges.

CAREFUL APPROACH TO TACKLING EUROPE

Europe, with its particularly tough regulatory environment, is currently on the backburner. The company had hoped it could bypass the EU Novel Foods approval process by "grandfathering" K12 into the market. That would mean proving the bacteria had been available in the EU before 1997, the cut-off point for enforcement of the Novel Foods Regulation.

Streptococcus salivarius, says Washington-Smith, is similar genetically to a starter culture used widely in the European dairy industry. However, BLIS's advisers have told the company this will not be sufficient to circumnavigate the onerous Novel Foods



NATURE'S PLUS TOOTH FAIRY NUTRITION AND INGREDIENTS FACTS

Supplement Facts		
Ingredient	Amount	% Daily Value
Calories	5	
Total Carbohydrate	2 g	1 %*
Xylitol	2 g	†
Vitamin D3 (as cholecalciferol)	400 IU	100 %
Calcium (as amino acid chelate/complex)	300 mg	30 %
L. acidophilus (2 billion viable cells‡)	150 mg	†
S. salivarius M18 (1 billion viable cells‡)	10 mg	†
‡ at time of manufacture		†
* Percent Daily Values are based on a 2,000 calorie diet.		
† Daily Value (DV) not established.		

Other Ingredients:

Xylitol, di-calcium phosphate, stearic acid, natural vanilla flavor, **Dental Support Herbal Complex** [spinach (*Spinacia oleracea* leaf extract), broccoli (*Brassica oleracea* floret extract), fig concentrate (*Ficus carica*), date concentrate (*Phoenix dactylifera*)], magnesium stearate, guar gum.

system. So BLIS has hired consultancy firm Cantox International to steer it through a Novel Foods petition.

Washington-Smith admits, however, that he knows little of the EU Nutrition & Health Claims Regulation and how this may affect BLIS's European endeavours. The priority, it seems, is simply to win approval for the ingredient.

FOCUS ON THE US

In terms of geographies, however, the US is BLIS's priority. Washington-Smith says *Streptococcus salivarius* was used commercially before 1994 in America, when the US Dietary Supplement, Health and Education Act was implemented, which means it can be grandfathered into the country's supplements market. BLIS is now embarking on gaining Generally Recognised as Safe status for the ingredient, which is required if it is to be used in the US food and beverage sector.

America is a good opportunity for BLIS, says Washington-Smith. "The market understands the concept of probiotics, by virtue of the fact that Danone has done a great job with their range of gut probiotics. They've lit a fire under the mainstream of North American consumers about probiotics

in general and the benefits. It isn't a very great leap of faith from a gut probiotic to an oral probiotic."

Major US retailer Costco is to stock dietary supplements containing BLIS K12 from the fourth quarter of this year in a 50-store trial.

It is in America that BLIS has debuted M18, its newest probiotic strain, which is said to live around the teeth and gums and help prevent tooth decay. Billed as a "Children's Chewable Dental Probiotic", Animal Parade Tooth Fairy from Nature's Plus is said to contain "live M18 probiotic cells, *L. acidophilus*, tooth-building vitamin D3 and calcium, and xylitol, which may reduce the risk of tooth decay!" The vanilla-flavoured animal-shaped chewables, sweetened with xylitol, "also contain a targeted whole food blend of natural tooth-friendly nutrients".

Dr Richardson has also told BLIS shareholders that six new retail products containing either K12 or M18 probiotics would be launched in the US by the end of March 2010.

"Americans are very big in the oral care space in general," says Washington-Smith. Applications for M18 are likely to include chewing gum, toothpaste and mouthwashes.

BLIS SEES ITS FUTURE IN FOOD APPLICATIONS

For K12 the future may lie increasingly in food and beverage products. Washington-Smith says BLIS has been working with the ingredient in yoghurt applications. "Our yoghurt delivery system is well advanced," he says. "I see greater and greater effort going into the functional food space, especially the yoghurt area. In South East Asia and Singapore we have had a lot of discussion with companies about the inclusion of K12 in yoghurt products. Our future is going to be in functional foods."

Functional candy may be another key application in the food sector. "I see [Throat Guard] as far more akin to a functional confectionery than I do a dietary supplement," says Washington-Smith. "The loading dose in a lozenge is about 17mg of active K12 in a 600-700mg lozenge, so there's plenty of scope for a great tasting product. I've seen some of the products our contract manufacturers in the States have put together and they are more akin to sweets." Washington-Smith says a dose of K12 adds about four US cents to a product, be it a lozenge or a pot of yoghurt.

BLIS says it has also established that K12 kills bacteria associated with bad breath. As a result it has launched the BLIS K12 Fresh Breath Kit, which consists of lozenges and mouthwash, as well as a "tongue cleaner/scrapper".

BLIS still advertises in New Zealand, focusing on radio and print, but now also concentrates much of its NZ\$100,000-a-year (\$73,500/€49,500) marketing efforts on targeting pharmacies as well as consumers. "In the last 12 to 18 months we have put a lot more effort into building relationships with retail pharmacists," says Washington-Smith. "It is extraordinarily important to bring the decision influencers on board with us, so that pharmacists are not only aware of but endorse the concept. Those that take K12 love it and we get a lot of repeat business."

BLIS has clearly examined its business model from top to bottom and shown itself to be unafraid of making changes wherever change is considered necessary. "We have basically wiped everything we have done in the past and started afresh," says Washington-Smith. That alone won't guarantee success; but it's a start and there are positive signs for the business, particularly in the US and Asia, that bode well for the future.

BLIS PRODUCT RANGE

In New Zealand, where it all started, BLIS now markets a range of products designed to help fight sore throats, including*:

- **Throat Guard Daily:** the flagship product in the range, sold in packs of 30 lozenges in Strawberry and Vanilla flavours. It is designed to be used daily as a precautionary health measure to help prevent common throat conditions associated with the winter season. A pack retails for around NZ\$19 (\$14.00/€9.40).
- **Throat Guard Boost:** said to offer "immediate and intensive results" in a "pharmacy strength mouthwash". The product will "rapidly establish the BLIS K12 Probiotic inside the mouth and oral cavity, while soothing and comforting the throat," says BLIS.
- **RapidEze Gargle:** a powder "formulated to provide rapid soothing of your throat" when mixed with water and gargled.
- **Travel Guard:** "Used by flight crew and international travellers," says BLIS. "Airborne germs are a common cause of concern for travellers. Additionally, when you arrive at your destination, you may often encounter germs that the body is not used to. Many of these germs enter the body through the nose and mouth. BLIS K12 Travel Guard lozenges contain BLIS K12 which has been shown to support the throat's natural immune defence system." Recommended dose is: "Four lozenges on the day before travel; four lozenges on the first day of travel; and four lozenges during travel."

[*product descriptions taken from BLIS website]

But General Mills believes that by trading more explicitly on the traditional athletic positioning of Wheaties, and by more directly involving some of the same athletes who have graced the front of the packages of its regular cereal over the years, Fuel can target “a broader psychographic” of men “with a competitive spirit”, as Stangler put it.

And Stangler defended the company’s decision to aim marketing explicitly at men rather than at women, who typically buy most cereal. “Trends are changing – more than 70% of men grocery shop at least once per week,” Stangler said.

Furthermore, “there are plenty of products designed and targeted for men that are successful now and have been historically,” including razors and deodorant. “Men don’t use their wives’ razors or deodorant,” Stangler said. “Why would they eat their wives’ cereal?”

Some outside experts believe that General Mills actually might be on to something with Fuel, especially given the particular timing of its debut. “This economy has impacted men more than women,” said David Becker, president of Philippe Becker, a packaged-goods branding consultancy in San Francisco. “They’re bearing the brunt of the layoffs, spending more time at home – and doing more shopping. You see men in the aisles that you didn’t used to see.”

What’s more, 20-something men in Generation Y are more likely to be open to marketing messages aimed specifically at them, even for cold cereals, than older generations, noted Rodney Mason, chief marketing officer of Moosylvania, a St. Louis-based branding firm.

Plus, Becker said, Fuel’s distinctively male positioning “makes it easier for women to sell the idea of bringing [better-for-you] products into the home when the marketing cues are less traditionally feminine than they typically are for healthy products. ‘Diet’ or ‘natural’ don’t work with most men.”

General Mills is helping on the Wheaties web site with, among other things, webisodes that show “the creation process” of Fuel starring the athletes and the nutritionist. You can view the videos of the “creation process” by going to <http://www.wheaties.com/evolution/index.html#/idea>.

GRAPE NUTS’ ATTEMPTS TO WOO MEN BEAR NO FRUIT

The trouble is, this whole approach sounds a lot like what Post Foods tried to do last spring when it launched a new advertising campaign for Grape Nuts that was aimed specifically at men.

The cheeky campaign included a special web site on MSN.com with dozens of two-

minute videos. “When you tackle something tough at work or at home, that doesn’t just take know-how – that takes Grape Nuts,” said a voice-over uttering the thinly veiled reference to testosterone, which touted the cereal’s quality and offered advice on topics such as how to ask for a raise during a recession.

Post even enlisted Kenny Mayne, a well-known personality on ESPN – the Entertainment and Sports Programming Network, an American television channel which broadcasts sports 24 hours a day – to narrate the videos.

The Grape Nuts site also offered “The Guy’s Manual”, with tips on topics such as restoring vintage cars. Print ads in *Sports Illustrated* featured men fishing and golfing.

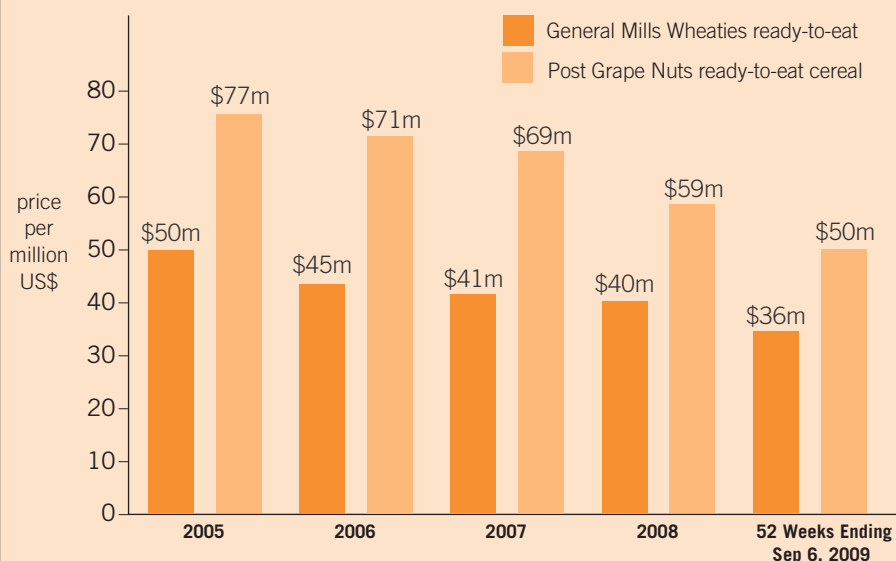
It turned out that Grape Nuts traditionally have been eaten mainly by men but the brand had continued to orient itself toward women. In 2006, for example, the Grape Nuts campaign focused on a healthy-eating message with ads that ran during daytime soap operas and even *Oprah*.

But as of around the time that General Mills launched Fuel, the company could take no encouragement from early sales returns after Grape Nuts launched its male-oriented marketing campaign: Sales of Grape Nuts during 2008 were down 14%, according to IRI data. And in the 52 weeks ended September 6 2009, they were down 13%, this decline coming despite a price point in line with regular cereals.

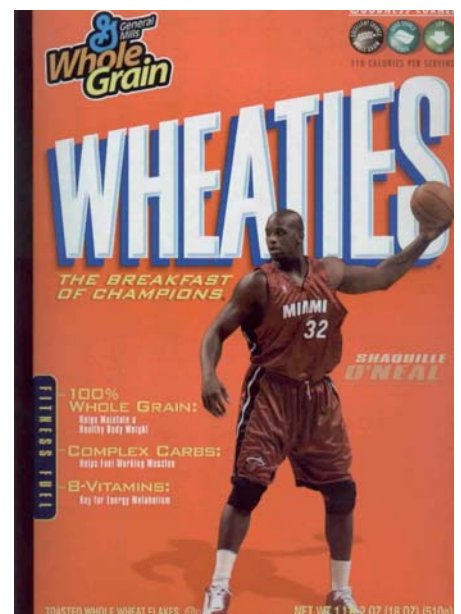
CHART 1: CAN A MALE HEALTH FOCUS REVIVE DECLINING CEREAL BRANDS?

General Mills is adopting an overtly male re-positioning for its declining Wheaties cereal, but such a male focus has done nothing to revive the declining fortunes of the Post Grape Nuts brand.

Sales shown are US supermarkets and other mass merchandisers, excluding Wal-Mart



Source: Infoscan Reviews, Information Resources, Inc. (IRI)



How the Wheaties brand looked before its recent make-over.

Campbell's takes Chunky from "beefy" to better-for-you

For years Campbell's Chunky range of soup has got by very well by appealing to the hearty appetites of 'real men' – the sort who would respond to advertising featuring football-playing athletes. But times have changed, sales have slumped, and it seems these men have families and are thinking harder about health. Campbell's makeover for Chunky sees lighter, leaner, better-for-you soups that are targeting women as much as men. By DALE BUSS.

For a while now, Campbell Soup executives have been trying to unlock at least a couple of mysteries that are important to their business. First: How do we most effectively exploit the intrinsic better-for-you qualities of soup? And, second, how do we capture the male audience that is so crucial to soup sales?

Now, they're hoping that a new approach to Campbell's Chunky soup line – based on reformulated products, a new emphasis on vegetables and lean meat on labels, and a fresh marketing campaign – will help the Camden, N.J.-based giant answer both questions.

"We realized that men really wanted to eat better but didn't want to think very hard about it; the majority of men aren't turning packages over to the back panel," Doug Brand, Chunky's senior brand manager, told *New Nutrition Business*. "They're looking for quick and simple solutions that don't require them – in their cluttered, busy lives – to work hard to know that they're getting good food that is good for them.

"So our internal rallying cry became, 'Chunky can be the perfect solution to the male meal dilemma'."

TACKLING SALES SLUMP

The new Chunky initiative also clearly is aimed at solving the brand's sales dilemma. Overall US sales of canned soup have performed rather well lately, having risen an average of 3% to 4% annually for the last few years, and Campbell leadership has been projecting gains just as healthy as strapped American consumers increasingly favour the economical food.

But Chunky's performance lately has been a different story: Its sales have slumped badly over the last few years, and its overall market share has dwindled even as Campbell's added Chunky's Fully Loaded and Chunky's Healthy Request sub-brands.

For the 52 weeks ended August 9, sales of the main Chunky line were down more than 9%, to about \$325 million (£219 million) in outlets measured by Information Resources Inc., the Chicago-based outfit that monitors sales in US supermarkets, drug stores and mass merchants except for Wal-Mart Stores.

That decline followed annual declines of 13%, 9% and 6% for calendar 2008, 2007 and 2006, when regular Chunky was still a \$432-million (£291 million) brand in IRI-measured outlets. Meanwhile, market share for all Chunky SKUs declined from more than 29% in 2006 to only about 26% for the most recent 52 weeks.

Clearly, stale marketing was one reason that the brand had stagnated. The brand's long-running "Mama's Boys" campaign had featured well known professional football players and their "mothers" who brow-beat them into making sure they were eating their

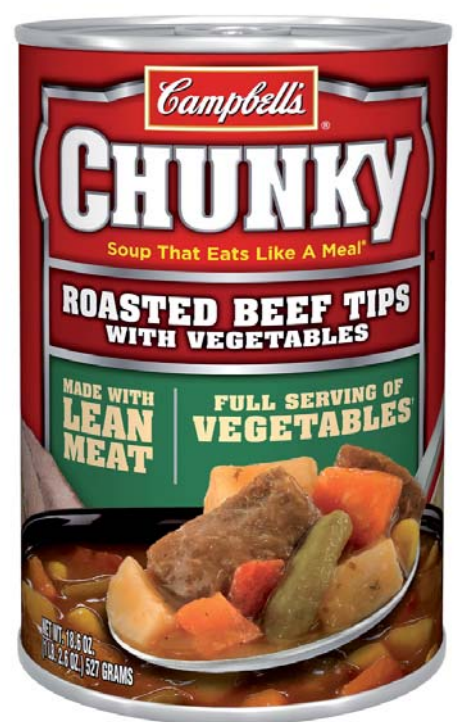
Chunky soup.

"We delivered a strong message that we were the heartiest and most satisfying soup in the aisle, and it doubled growth" between 1999 and 2007, Brand noted. "That campaign spoke incredibly well to men and to women for 10 years. It delivered the message that Chunky's 'fills you up right'."

But in the wake of recent sales woes, he explained, "Now we've decided to define what 'right' means. Consumers are looking not just to be full, but to be full of something that gives them confidence that they've made a good choice for themselves, and their families."

NEW 'POWER CLAIMS' – PROTEIN, VEGETABLES AND LEAN MEAT

Given how exhaustive the Chunky's makeover would be, Campbell decided



to start with the products themselves, and nutritional expectations, and to build a new marketing campaign on top of them. Executives wanted to get consumers – both men and the women who shop for them – to focus anew on Chunky's nutritional attributes and then to reformulate the actual soups as necessary to best support those claims.

"We established in our minds three what we called 'power claims' that we wanted to celebrate with consumers and that Chunky could deliver as a brand," Brand explained. The claims are that a soup is a "good source of protein," contains "100% lean meat" and includes a "full serving of vegetables". He said that "these are powerful to the consumer and also are recognized by them as claims of quality."

Most Chunky varieties already could deliver on at least one of those claims, and many on at least two. But Campbell executives understood that relatively minor tinkering with a handful of their SKUs could take the overall brand a long way toward even more strongly fulfilling these newly important nutritional criteria. So they took about 18 months to reformulate 11 varieties and add two new ones for a total of 40.

Sirloin Burger was one of the reformulated varieties. As the No. 3-selling item in the Chunky line, putting the "power claims" on the label of this product would be crucial. But previously, the beef in Sirloin Burger couldn't be described as "lean". So product developers took fat out of the sirloin while trying to maintain the product's robustness.

"As you take fat out of the product, you lose a little bit of the texture and mouthfeel and quality of the burger," Mark Tolbert, a Campbell research scientist, explained to *New Nutrition Business*. The leaner burger pieces were reconstituted to keep the requisite mouthfeel, while Campbell bumped up the levels of certain spices to counter the effects on taste of lost fat.

Similarly, Campbell had to tweak certain other varieties in order to be able to state truthfully that they contain a "full serving" of vegetables. "That required quite a bit of work on several SKUs," Tolbert said.

For example, Chicken Broccoli Cheese needed a boost in that area. However, broccoli isn't a very dense vegetable, and so formulators were going to have trouble fitting more of it into a can so that this variety could qualify for the claim. At the same time, using a relatively dense vegetable to help out – such as tomato paste – would pose colour problems for this SKU. R&D's solution included using less-dense, golden-colored vegetable pastes and squeezing some water out of Chicken Broccoli Cheese.

All told, about two dozen varieties of Chunky now can make all three power claims. And Campbell has leveraged that by making two of the relevant claims very prominent on the front of each can – and reducing the size of the "spoon shot" photo of the soup. On the back, Campbell also has put a box above the nutrition label that checks off secondary nutrition claims such as "0g of trans fats" and "excellent source of vitamin A".

"This shows to the consumer our commitment to better-for-you products in a way that we're proud of," Brand said.

SOFTER ADVERTISING – BUT FOOTBALL STILL FEATURES

Chunky's new TV advertising is focused on Everyman – a farmer, for instance – rather than celebrity athletes. The brand also is more explicitly pursuing the women who purchase most soup and actually consume about half of the Chunky products on their shelves.

"Why we made Campbell's Chunky soup," says one recent spot, over scenes of a shipyard worker leaving the job. "Why we're making Chunky better," the ad says next, as the worker arrives home to his kids."

Still, Campbell is using at least one well known NFL icon, former Dallas Cowboys quarterback Troy Aikman, as a print spokesman. And Campbell continues to target pro-football fans with Chunky's marketing.

At the same time, given the economic backdrop, the last thing Campbell is going to do is raise prices. Most Chunky varieties carry suggested retail prices of around \$2.59 (€1.74), but Wal-Mart carries them in the winter for as low as \$1.50 (€1.00) a can.

"Value is a hot button in our industry, and it's really a function of quality over price," Brand said. "We've pumped up the quality of our brand and invested in it financially as well as nutritionally."

NOW CAMPBELL'S CHUNKY™ HAS 34 SOUPS THAT ARE A
GOOD SOURCE OF PROTEIN

BETTER THAN EVER

Advertisement for Campbell's Chunky soup highlighting protein content. The ad features a large 'GOOD SOURCE OF PROTEIN' headline with a bowl of soup and a spoon. Below is a can of Campbell's Chunky Beef Sirloin Burger soup. The tagline 'BETTER THAN EVER' is at the bottom.

NOW CAMPBELL'S CHUNKY IS
BETTER FOR YOU

BECAUSE TWENTY-THREE SOUPS HAVE 100% LEAN MEAT AND A FULL SERVING OF VEGETABLES

BETTER THAN EVER

Advertisement for Campbell's Chunky soup highlighting lean meat and vegetables. The ad features a large 'BETTER FOR YOU' headline with a bowl of soup and a spoon. Below is a can of Campbell's Chunky Beef Sirloin Burger soup. The tagline 'BETTER THAN EVER' is at the bottom.

NOW CAMPBELL'S CHUNKY HAS TWENTY-THREE SOUPS WITH
100% LEAN MEAT AND A FULL SERVING OF VEGETABLES

BETTER THAN EVER

Advertisement for Campbell's Chunky soup highlighting 100% lean meat and a full serving of vegetables. The ad features a large '100%' headline with a bowl of soup and a spoon. Below is a can of Campbell's Chunky Beef Sirloin Burger soup. The tagline 'BETTER THAN EVER' is at the bottom.

Print ads for Campbell's better-for-you Chunky range focus on three "power claims": That the soups are a "good source of protein", are made from lean meat, and contain more vegetables. About two-dozen varieties of Chunky soups can now make all three claims.

FUNCTIONAL & HEALTHY-EATING NEW PRODUCT LAUNCHES

Each month we summarise new product launches from around the world.

• Part 1: North America • Part 2: Rest of the World

All new product information is sourced exclusively from Mintel's GNPD (Global New Products Database), which can be visited at www.gnpd.com. Mintel can be contacted at 18-19 Long Lane, London EC1A 9PL, U.K.. Tel. +44-(0)20-7606-4533, Fax +44-(0)20-7600-3327

Country	Company	Brand & Product	Description
PART 1: NORTH AMERICA – FOODS & BEVERAGES			
BAKERY			
USA	Kashi	Kashi Heart to Heart Whole Grain Crackers	Contain plant sterols, which "can help reduce cholesterol", & six natural antioxidants including green tea, white tea and grape seed, "which supports healthy arteries". Low in sodium and contains nothing artificial.
USA	Ralcorp Frozen Bakery Product	Krusteaz Multi-Grain Waffles	Formulated with CoroWise, a brand of cholesterol-lowering plant sterols said to promote a healthy heart. Low in fat, reduced in sodium, provide a good source of fibre, contain naturally sourced ingredients.
BEVERAGES			
Canada	Nestlé Waters	Nestlé Pure Life Splash Plus Cranberry Flavoured Water	Enhanced with vitamin E, and said to contain "protective antioxidants for the maintenance of good health". Also available are: Tropical Fruit variety for energy and vitality; and Raspberry Lime variety for bone health.
Canada	PepsiCo	Aquafina Plus+ Vitamin Enhanced Water	No artificial flavours, said to be an excellent source of antioxidant vitamins C and E, "which help protect the body from harmful free radicals that can cause cell damage", and B vitamins.
Canada	Premier Nutrition	Rocket Shot Energy Shot	Contains B vitamins, L-taurine and caffeine.
USA	Funktional Beverages	Supraliminal Labs Red Stuff Energy Dietary Supplement	Described as a "hybrid drink" that combines energy, appetite control, calorie burners and 100% natural GRAS fibre.
USA	Fuze Beverage	Fuze Empower Goji Wild Berry Flavour Beverage	Contains "a powerful blend of antioxidants A+C+E, chromium and l-carnitine".
USA	Stevenson Products	Mini Chill Berry Bliss Flavour Relaxation Shot	A sugar-free natural stress relief drink. Said to act on mood and focus, to be non-drowsy and free from caffeine.
BREAKFAST CEREALS			
Canada	Lucerne Foods	Eating Right Cranberry and Raisin Muesli	A source of seven essential nutrients and is very high in fibre.
Canada	Metro Brands	Irresistibles Rice Flakes with Probiotic Yogurt Drops	Contains probiotics and 15% yogurt drops with active <i>Lactobacillus acidophilus</i> bacteria.
USA	General Mills	General Mills Wheaties Fuel Cereal for Athletic Man	Said to be the first-ever cereal designed specifically to "help fuel wins". Developed with the help of athletes and sports nutritionist Dr. John Ivy. Features long-lasting energy from whole grains and 100% of the DV of five B-vitamins.
USA	Quaker Oats	Cap'n Crunch's Race Car Crunch Sweetened Corn and Oat Cereals with fun race car shapes	A limited edition product. Pack features the Smart Choices Made Easy logo as it is low in saturated fat and is cholesterol free, which "helps support healthy heart in children and adults".
DAIRY & DAIRY ALTERNATIVES			
USA	Stonyfield Farms	Stonyfield Organic Nonfat Yogurt	Available in a Super Fruits Pomegranate Raspberry Acai flavour. Said to contain antioxidant-rich fruits, to be fortified with vitamin D, and to be made from organic nonfat milk. Contains cultures to "enhance digestive and immune health", including: <i>L. bulgaricus</i> ; <i>S. thermophilus</i> , <i>L. acidophilus</i> , <i>bifidus</i> , <i>L. casei</i> ; and <i>L. rhamnosus</i> .
USA	Yoplait	Yoplait Yo-Plus Light Strawberry Banana Digestive Yogurt	A nonfat yogurt with sucralose and other sweeteners. Contains one-third fewer calories than regular low fat yogurts, and is enriched with vitamins A and D, and fibre.
USA	Redwood Hill Farm	Redwood Hill Farm Blueberry Pomegranate Kefir Cultured Goat Milk	With 10 live and active kefir cultures, is described as a great source of calcium, protein, and essential minerals.
USA	The Icelandic	Siggi's Icelandic Style Skyr Strained Non-Fat Yogurt	All natural, high protein yogurt comes in the following flavours: Orange and Ginger; Blueberry; Plain; and Pomegranate & Passionfruit.
DESSERTS & ICE CREAM			
USA	Better Bowls	Better Bowls Strawberry Gelatin Mix	An "excellent source of fibre and vitamin C". Fat free, gluten free, low in sodium, and contains 0g trans fat and only 120 calories per serving. No synthetic colours. Features the Heart Healthy logo.
USA	Luna & Larry's Bliss Unlimited	Luna & Larry's Coconut Bliss Dessert Bars	Made from coconut milk and are free from soy, dairy & gluten. Said to be "special because of the synergy between two amazing foods: coconut milk, which is cholesterol-free and rich in lauric acid and MCTs; & agave syrup, a natural low-glycemic sweetener that is gentle on the body".
MEALS & MEAL CENTRES			
USA	Fuji Food Products	Fujisan Brown Rice California Roll	Fortified with omega-3 DHA "for a healthy brain, eyes & heart", is said to be an excellent source of dietary fibre. Each serving provides 25% of the RDI of dietary fibre. No added MSG. Fully-cooked and ready to serve.
USA	Garden Protein International	Garden Meat Substitutes	Contain a mix of soy, wheat and pea proteins, vegetables, quinoa, amaranth, millet, and kamut. Includes the following varieties: Chick'n Scallopini; Beefless Tips; Buffalo Wings; Chick'n Good Stuff; and 7 Grain Crispy Tenders.

NEW PRODUCTS

Country	Company	Brand & Product	Description
PART 2: REST OF THE WORLD – FOODS & BEVERAGES			
BAKERY			
Brazil	Kodama	Seven Boys Benefice Pão de Cereais com Iogurte (Low Fat Cereal Bread with Yogurt)	Free from trans fat and added sugar. Contains added hydrolyzed collagen and vitamins A, C and E. These additives are said to help maintain skin elasticity and to fight free radicals.
Indonesia	NutriFood	Tropicana Slim DiabetaMil Nutty Chocolate Cookies with Oat Flakes	Now available in a new 200g carton. The cookies are said to control calorie intake and are free from added sugar. They contain fibre and are designed for diabetic sufferers.
Italy	AIA	AIA Aequilibrium Torta 5 Cereali (Sponge Cereal Cake Mix)	Now available in a 550g pack. A fresh liquid cake mix containing less than 30% fat and it is claimed to be naturally rich in corn fibre. "Dietary fibre, including corn fibre, contribute in the slowing the absorption of fats and reduce cholesterol levels, thus reducing the risk of cardiovascular problems".
Portugal	Ignoramus Productos Naturais	Cem Porcento Biscoitos de Tremçoço (Lupine Flour Biscuits)	Suitable for diabetics and free from milk, eggs and added sugar. Also provide a source of fibre. Lupine is said to control blood sugar levels, reduce appetite and cholesterol, to relieve constipation, and control obesity.
Portugal	Sos-Cué tara	Cué tara Equilibre Fibra Due L-Carnitina Integral Choc (Wholegrain Chocolate Biscuits)	Made with 3 cereals: wheat, barley, & rye. They provide a high fibre content, which "aids intestinal functioning, and L-carnitine, which helps burn fat during exercise". The biscuits contain 160mg of L-carnitine L-tartrate per 100g.
Sweden	Pyramid Bageriet	Pyramid Bread Hearts	Bread Hjärtan (Hearts), baked in a wood-fired oven, are formulated with omega-3 and less than 0.3g salt.
BEVERAGES			
Chile	MedCell	VNX Bebida Energética Zero (Zero Energy Drink, Guarana-flavour)	Free from calories and fortified with vitamins. Said to be suitable for sports people, as it contains caffeine, taurine, vitamins and L-carnitine.
Finland	Hartwall	ED Power Shot	New under the ED Power Shot brand is vitamin-enhanced Energy Drink. Said to contain as much caffeine in one 150ml can as regular ED Energy Drink does in a 250ml can, approximately equivalent to a cup of coffee.
Finland	Valio	Valio HeVi Shot Marja & Vilja Berry & Cereal	New to the Valio HeVi Shot range is Marja & Vilja (Berry & Cereal) a nutritious snack with strawberry, lingonberry and rye bran. This milk, preservative- and additive-free fibre-enriched product retails in a four-pack of 100ml cartons.
Germany	Carpe Diem	Carpe Diem Kombucha Fresh All Natural Herbal Fermented Beverage	Contains only ingredients from 100% natural source, contains natural antioxidants, and "harmonises the metabolism". Available in new flavours: Quitte (Quince), which is rich in vitamin C; and Cranberry, which is rich in antioxidants.
Hungary	Nestlé	Nestlé MamAlete Juice for Pregnant & Nursery Mothers, Apple-Traube Stillsoft (Apple-Grape Juice)	Especially developed for pregnant & nursing mothers. This 100% beverage with iron and folic acid is free from added sugar and rich in vitamin B12 and iodine. The gluten-free mild drink from selected ingredients is enriched with vitamin C, which "supports the power of resistance". Free from flavour enhancer, colourants and preservatives.
Italy	Coop	Coop Vivi Verde Infuso di Finocchio (Organic Fennel Infusion)	With a "light, refreshing and aromatic taste", the product is suitable in cases of a bloated stomach & features a diuretic effect. Said to be cultivated & manufactured using a production system that respects animals & the environment.
Italy	Hero	Hero Diet A+C+E Fruit Drink	A low calorie nectar, enriched with vitamins C, E, and provitamin A. Contains only 16 calories per 100ml, and features a juice content of 33%. Orange, lemon and carrot flavour.
Italy	Parmalat	Santal Top Active Tonic Ice Arancia Rossa e Carota (Blood Orange & Carrot Drink)	Now with new packaging and is formulated with a "refreshing and regenerating cooling factor" with added ginseng, magnesium and yerba mate. This preservative-free product contains vitamins C, E and provitamin A.
Japan	Ajinomoto General Foods	Blendy Café Au Lait Coffee with Oligosaccharides	Contains oligosaccharides to boost the bifidobacterium count in the intestines.
Japan	Coca-Cola	Daily Oligo Black Coffee	The new FOSHU-approved product in the Georgia range. Aimed at consumers concerned about body fat and was brewed from premium Emerald Mountain beans from Colombia's coffee association. Formulated with coffee bean mannooligosaccharide, which suppresses fat absorption.
Japan	Nagatanien	Ginger Beverage Concentrate in a Lemon flavour	Aimed at infants and primary school children as well as their mothers. Contains "body-warming ginger juice", as well as lemon juice, honey, quince juice and added vitamin C.
Mexico	Signa Grain	Miller's Avena Instantánea para Preparar Licuado Sabor Vainilla (Vanilla Flavoured Instant Oat Drink Mix)	Fortified with 14 vitamins and minerals and features a very low sodium content. Rich in fibre and protein. Repackaged in a 300g resealable pouch featuring Looney Tunes designs and containing a mini Looney Tunes toy.
Sweden	Kickup	Kickup Pureenergy Green Berries Energy Drink	New to the Kickup Pureenergy range is taurine-free Green Berries Energy Drink with vitamins and minerals.
BREAKFAST CEREALS			
Australia	Cereal Partners	Uncle Tobys Plus Omega 3 Lift Breakfast Cereals	Clusters with sultanas, almonds and flax seeds. The wholegrain cereal is claimed to be a source of omega-3, which is an essential fatty acid that "helps support well-being", and fibre. Retailled in a 430g pack as well as a 40g single serve pack.
Australia	Nestlé	Uncle Tobys Fruity Bites Wildberry Cereal	Described as a good source of fibre and is said to keep the digestive system healthy. This wholegrain cereal contains all three parts of the grain; bran layer, germ and endosperm. It also provides a natural source of complex carbohydrates, protein, vitamins and antioxidants. Now in a newly designed 500g pack.

NEW PRODUCTS

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Australia	Nestlé	Uncle Tobys HealthWise Cereals for Bone Well Being	Claimed to be rich in calcium and magnesium for strong bones, contains magnesium and zinc for bone structure and strength. The wholegrain product made with milk calcium is retailed in a 360g pack featuring the National Heart Foundation logo.
Greece	Nestlé	Nestlé Fitness Fruits Cornflakes with Antioxidants	Formulated with vitamin E and celery extract. This wholegrain product is retailed in a 375g pack.
Mexico	Kellogg	Kellogg's Special K Sabor Fruit & Yoghurt (Fruit & Yogurt Cereal)	Toasted rice flakes with fruit and yogurt flavoured oats and wheat. Low in fat, cholesterol free, and enriched with 14 vitamins and minerals. According to the manufacturer, the cereal contains: folic acid, "required during pregnancy for the formation of the baby's nervous system"; iron, which is "essential for the transportation of oxygen to cells"; calcium, "important for the formation of bones and teeth"; and proteins, which "help form muscle tissues and give structure to the body". Repackaged in a newly designed 315g recyclable carton. Contains only 120 calories per serving.
New Zealand	Sanitarium	Sanitarium Fibre Life Bran and Oats Cereal with Berry	Very high in fibre, provides a source of antioxidants and a good source of whole grain. Approved by the National Heart Foundation and contains no artificial colours or flavours. Said to "maintain inner digestive health, help you feel fuller for longer and curb the appetite for mid-morning snacks, and provide wholegrain goodness and carbohydrates for a healthy, energised start to the day".
Spain	Nestlé	Nestlé Fitness Cereales Integrales Chocolate Negro (Whole Wheat Dark Chocolate Cereals)	Contains 55% cocoa, calcium, nine vitamins and iron. It is said to help with weight control. Repackaged in a newly designed 375g pack. Also repackaged are the following varieties: Copos de Trigo Integral y Arroz (Whole Wheat Rice Flakes); and Frutas (Fruits).
CONFECTIONERY			
Japan	Ezaki Glico	GABA Chocolate, Milk flavour	Reformulated to improve the chocolate flavour. This "mental balance" product contains 280mg of GABA per 100g of chocolate. Also available are the following variants: Bitter; and Family Pack, which contains 15 individually-wrapped bags of two tablets each.
Thailand	Guylian	Guylian Extra 74% Cocoa Dark Belgian Chocolate	Rich in antioxidants and is made with Acticoa, fat-reduced cocoa said to help protect the body against free radicals.
DAIRY & DAIRY ALTERNATIVES			
Argentina	Danone	Danone Ser Calci+ Yogurt de Frutilla (Strawberry Yogurt)	Claimed to provide 100% of the calcium RDV. Contains <i>B-puritas</i> and is free from fats and cholesterol. Low in calories and fortified with calcium, folic acid, and vitamins A, D, and E. Packs feature the logo of the International Osteoporosis Foundation.
Australia	Freedom Foods	Australia's Own Organic Honey Oat Milk	Made with only all natural ingredients, including organically grown Australian oats. According to the manufacturer, oats are one of nature's most nutrient rich grains and they produce a highly nutritious beverage. Beta glucan is the naturally occurring soluble dietary fibre in oats and is said to have the ability to lower cholesterol for heart well-being. Lactose-free and a source of fibre. Also available is gluten-free Rice Milk.
Ireland	Glanbia Consumer Foods	Avonmore Super Enriched Whole Milk	With extra calcium and folic acid plus four vitamins A, B, D, and E. The milk is said to promote healthy bones and teeth, growth and repair, vision and skin, release of energy, healthy blood and nervous system, and pregnancy.
Italy	Danone	Danone Activia Con Fibre Miele e Germe di Grano (Honey & Wheat Germ Yoghurt)	Contains fibre and trademarked <i>Bifidus Actiregularis</i> , said to help improve slower digestive transit.
Italy	Exquisa	Exquisa Fibrattiva Prugna Cereali (Prunes and Cereals Yoghurt)	Said to provide regularity if consumed once a day. Contains culture <i>Bifidus actiflora</i> .
Italy	Trentinalatte	Collina Felice Yo Ben Drink Probiotic (Probiotic Drinking Yogurt)	With active ferments, available in an Frutti Esotici (Exotic Fruits) variety. Free from preservatives, and contains BB-12 <i>bifidobacterium</i> , LA-5, and L. casei-453. It retails in a 200g bottle.
Portugal	Danone	Danone Activia Bebida Láctea Fermentada com Coco e Muesli (Coconut and Muesli Flavoured Drinking Yogurt)	Formulated with <i>Bifidus Actiregularis</i> , said to aid in digestion and minimise bloating. Pack contains four 149ml bottles.
Spain	Puleva	Puleva Digestiva Complet Leche Baja en Lactosa (Skimmed Milk with Omega 3 DHA)	Low in lactose, and is claimed to promote digestion.
SNACKS			
Indonesia	Sanghiang Perkasa	Diabetasol Nulife Crispy Cereal Bar with a Chocolate flavour	This halal certified cereal bar is described as a calorie control snack, which contains fibre and is low in sugar, free from cholesterol and low in GI. Said to be suitable for "diabetic sufferers, old and young people, children who are suffering from obesity and people who are on a diet or need to reduce sugar intake".
Netherlands	Hero	Hero B'tween Kokos (Coconut Muesli Bar)	Reformulated and is claimed to taste better. Made with five wholegrain cereals and coconut pieces, and is partially coated with a layer of milk chocolate. It contains vitamins and minerals and no artificial flavours, colours or preservatives.
Portugal	Larsson	Trek Wholefood Energy Bar	Available in a Cocoa Brownie flavour. It is 100% natural, high in protein and free from added sugar, wheat and dairy. Described as a "sweet, rich, natural wholefood combination of fast and slow-release carbohydrates, protein, fibre, ginkgo biloba and ginseng for sustained alertness, endurance, recovery and hunger control".
UK	Applesnapz Limited	Snapz Crunchy Apple Chips	Repackaged and are now available in a newly designed 20g pouch, which contains snacks made from at least one fresh apple. The 100% natural chips have less than 1% fat, no added salt or sugar, are free from nuts, gluten, artificial flavourings, colourings and sulphur dioxide, and provide a good source of fibre. The product is neither baked nor fried.

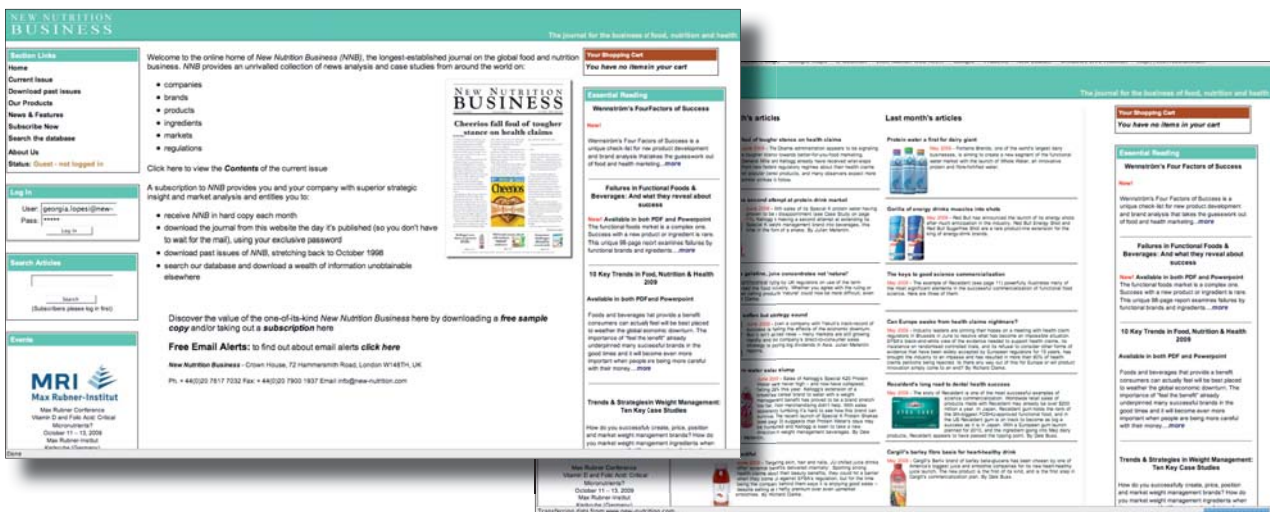
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And what they reveal about success

Published May 2009



PPT – 200 slides, product illustrations, charts and tables of data



PDF – 98 pages, 60 product illustrations, charts and tables of data

The functional foods market is a tough one and failure is more common than success. This report tells you what you must do to succeed.

This unique 98-page report examines fifteen case studies of brands and ingredients that have either been withdrawn from the market or have not performed as well as expected.

Part I is a concise 40-page analysis setting out which strategies are most effective and why.

Part II consists of 15 detailed case studies which summarise:

- success factors and common causes of failure
- common lessons for pricing, positioning and marketing
- key lessons in selecting ingredients
- key lessons in communicating benefits



The health benefit platforms covered include:

- Weight management (satiety and calorie-burning)
- Heart health (cholesterol-lowering, blood pressure-lowering)
- Bone health
- Joint health
- Beauty and skin
- Energy
- Digestive health
- Brain and eye development

Ingredients featured include:

- Probiotics
- Prebiotics
- Fibre
- Wholegrains
- Plant sterols and stanols
- Green tea
- Omega-3
- CoEnzyme Q10
- Protein
- Soy
- Calcium
- Glucosamine
- Antioxidants

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Marketing Kids' Healthy Beverages: Ten key case studies

NEW!

Published August 2009



PPT – 117 slides, product illustrations, charts and tables of data



PDF – 59 pages, product illustrations, charts and tables of data

In the market for kids' foods and drinks, it's in beverages that you will find the most examples of success – and some of the smartest innovations. The reasons include:

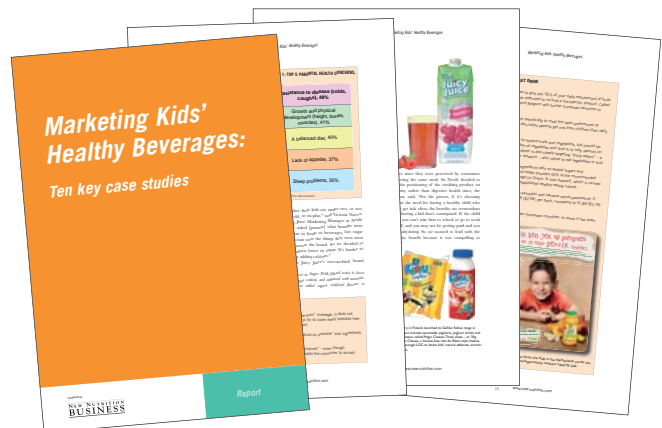
- superior convenience
- more scope for packaging innovation
- greater versatility in product formats
- beverage formulators are particularly skilled at making most things taste good
- consumers are more willing to experiment with beverages
- better margins encourage innovation.

The largest individual segment of the US kids' food and drink market is beverages, and it's a similar story in Europe.

Marketing Kids' Healthy Beverages begins with a concise 19-page summary of six possible strategies that beverage companies can follow whether they are renovating an old brand, as illustrated by the case study of Nestlé Juicy Juice and Britvic Fruit Shoot, or creating a new brand, as illustrated by the case studies of Crayons and Froose.

The report then sets out, over 38 pages, 10 detailed case studies based on interviews with the companies concerned and supported by supermarket sales data. They are:

- Nestlé Juicy Juice
- Smartfish
- Fruit Shoot
- Y Water
- Magic Fruit Potions
- Froose
- Republic of Tea
- Crayons
- The Switch



These case studies cover a wide range of possible categories and benefits including:

- Immunity
- Omega-3
- Free-from
- All-natural
- Digestive health
- Packaging innovation
- Teens and "tweens"

For any company, large or small, looking to create a successful proposition in kids' beverages, this report provides practical insights and examples.

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Probiotic juice: five key strategy lessons from Europe and the US

Case studies in digestive and immune health

Published October 2009



PPT – 100 slides, product illustrations, charts and tables of data

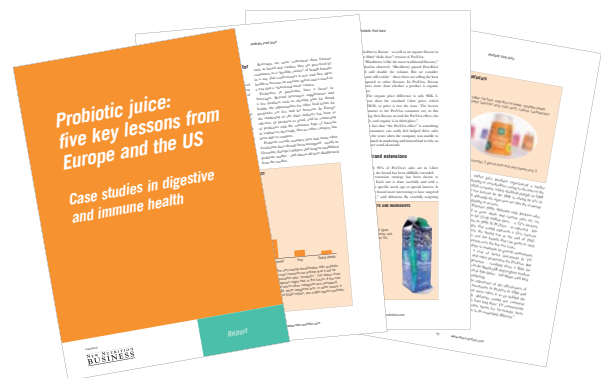


PDF – 40 pages, product illustrations, charts and tables of data

Probiotic juice is one of the biggest untapped innovation opportunities in the healthy beverage business, worldwide. The author of this unique report, Julian Mellentin, drawing on case studies from Europe and the US, sets out the five key lessons that are essential reading for anyone who wants succeed in probiotic juice.

The prevailing focus of interest in probiotics for digestive and immune health is dairy and solid foods, yet the biggest untapped opportunity lies in juice drinks.

In Europe it's already a success story. The ProViva probiotic digestive health drink has become a mass-market success in Sweden, where its per capita sales make it equivalent to a \$2.1 billion annual sales brand - as big as Gatorade. The brand has even maintained 8% annual growth during a year of economic recession, despite selling at a 50% premium to regular juices.



Underpinning Mellentin's concise analysis of the success factors are four case studies – all based on interviews with senior executives at the companies concerned - which include:

- supermarket sales data
- repeat purchase rates and market penetration
- strategies to penetrate the early adopter market and grow from there to the mass-market
- which marketing techniques are most effective and why
- communications strategies
- health claims and label messages
- how probiotic products are priced and how some can achieve super-premium prices
- taste trends
- brand extensions and new segments

This report – the only one of its kind on probiotic juice strategy - is written for anyone trying to develop an effective strategy in the challenging and fast-changing area of probiotics. It provides executives in marketing, technical, innovation and NPD roles with real-world insights that can be applied in any setting.

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PUBLICATIONS

Our case studies and reports give you unique insights into the vital and changing food, beverage and nutrition market.

REPORTS

Marketing Kids' Healthy Beverages: Ten key case studies **NEW!**

In the market for kids' foods and drinks, it's in beverages that you will find the most examples of success – and some of the smartest innovations.

Organic and all-natural kids' snacks and baby foods **NEW!**
Seven key case studies

Health-conscious parents seem committed to continuing to buy healthy food for their children despite the recession, even as they economise in other areas. This 42-page report looks in detail at these different approaches. Using seven detailed case studies we analyse the performance and strategies of leading organic and "all-natural" kids' snacks and babyfood brands in the US and UK.

Failures in Functional Foods & Beverages: **NEW!**
And what they reveal about success

The functional foods market is a complex one. Success with a new product or ingredient is rare. This unique 98-page report examines failures by functional brands and ingredients. It sets out the lessons that can be applied by anyone trying to develop an effective strategy for a brand or trying to commercialise nutrition science and offers concise strategies for reducing the risk of failure.

Energy shots: birth of a new premium-priced, high-growth category
Strategies, trends and case studies from the US and UK

Such is the value to consumers of the proposition of a daily dose of energy with no added sugar that in the US alone this new category has soared to over \$350 million in retail sales in less than two years - despite recession and despite selling at a massive 400% price premium over "mainstream" energy drinks such as Red Bull!

10 Key Trends in Food, Nutrition & Health 2009

Our annual review, *10 Key Trends in Food, Nutrition & Health*, is one of the most sought-after publications in the food industry. The report identifies the 10 mega-trends that will have the most impact on the food and beverage industries over the year ahead. It points companies towards some clear and practical strategies for their functional food and beverage developments, production and marketing.

Trends & Strategies in Weight Management:
Ten Key Case Studies

Our concise analysis shows which brand strategies are most effective and why, which ingredient strategies are most effective and why and sets out the key market and consumer trends. Our analysis is illustrated with ten detailed case studies which cover satiety and fat burning and look at how to use weight management to revive old brands or create new ones.

Superfruit: strategy for superfruit success

Superfruits are the product of a strategy, not something you find growing on a tree. Superfruits are revolutionising the way consumers relate to fruit and fruit-based products and they're growing their market fast – from 40%-100% every year. And yet just a handful of fruits have crossed over from commodity status to superfruit stardom. This guide provides a checklist for superfruit success.

Probiotics: Successful Strategies from the Global Marketplace

This report is written for anyone trying to develop an effective strategy in the challenging and fast-changing area of probiotics. It sets out the seven steps to creating a successful probiotic brand and describes probiotic strategy both in dairy and emerging new segments such as fruit juice and solid foods.

Functional and Health-Enhancing Juices: 7 Key Trends

Using 15 detailed case studies this report analyses the functional and health-enhancing juice business. It explains that digestive health, behind superfruits,

is the single most-promising trend for the juice industry – and demonstrates how two companies have quietly built digestive brands worth over \$50 million in annual sales. It explores juices with added ingredients and it points out that the areas of beauty, energy and weight management all have the potential for profitable growth.

The Food & Health Marketing Handbook

In a competitive world how do you take your technology to market so that it's your product that wins at the point of purchase? This handbook tells you how to get the best out of the science and the health benefits of your ingredients or products.

Price per unit SOLE USE ONLY (Multiple user price on request)

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CASE STUDIES

Anlene: What makes the world's biggest bone-health brand so successful?

Positioned as "Expert in Bone Nutrition", Fonterra's Anlene dairy brand dominates the high-calcium milk segment in Asia and is the biggest bone health brand in the world. Anlene has achieved that position as the result of both innovation in science and innovations in marketing, marketing communications, packaging and products. It's a case study that provides a model of best practice for anyone looking to communicate clinically-proven benefits.

Danone Actimel: Innovation Builds a Probiotic Mega-Brand

Danone's Actimel probiotic drinking yoghurt is the world's biggest immunity brand and one of the world's biggest and most successful probiotic brands. In this report Actimel's marketing communications, pricing, packaging, labeling, merchandising, advertising and consumer insights are analysed and explained in detail and illustrated with colour photographs, charts and images from advertisements to provide valuable lessons from which all food and beverage businesses can learn.

Innocent Drinks: What makes Europe's fastest-growing smoothie brand so successful?

For any company, large or small, looking to create a successful health proposition the story of the meteoric rise of smoothie makers Innocent Drinks shows what can be achieved in a tough, highly competitive category. Innocent's strategies are not elusive, nor unachievable – they are instead steps that any company can easily take to propel its brands to new levels.

Gainomax: How to create an expert brand in sports nutrition

Gainomax has shown how a brand can successfully broaden the market for a sports recovery drink, reaching beyond serious "elite" athletes to draw in occasional gym goers and other mainstream consumers while maintaining its loyal following among the elite athletes.

Cranberries: How Ocean Spray made them the world's most successful superfruit

Cranberries' rise to success as "the original superfruit" is well-known. Less well-understood is that cranberry sales actually declined for several years. That decline was turned around by a focus on innovative new product development and effective brand communications. This 35 page case study shows how Ocean Spray - and other companies in the cranberry field - have already moved cranberry far beyond simple cranberry cocktail.

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