

New therapeutic era/area?

Innovation in the food industry is now largely driven by the recognition of 'new foods', the primary molecular structure of which has been changed, or had micro-organisms, fungi, micro-algae, plants, cell or tissue cultures, etc. incorporated into it. Food supplements, as one of the most dynamic segments of the OTC market, are achieving great success as a result of continuous innovation that means that a third of sales are generated with new products that have been launched within the past 3 years.

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Alongside the fundamental trends that are brushing 'low-fat' or 'light' products aside in favour of the normalisation of 'free-from' products, the necessary revision of business models relating to the weight loss segment and the high level of demand for snacking products to reflect lifestyle changes, there are a number of micro-trends emerging.

The majority of these could be considered real breakthroughs that might lead to profound and widespread changes in our eating habits.

In light of the need to find new sources of protein, insect production industries, for example, are being encouraged and companies such as Ynsect are developing the concept of biorefining these invertebrates. Sticking with proteins, the growth in the snacking sector, which was initially driven by lifestyle consumers and consisted primarily of fruits and cereals, is expanding to incorporate meat-based products with various bars and bite-size snacks marketed by Omnibar and Epic, for example. This is also promoting the diversification of our approach to vegetables as we now enjoy

them in a variety of new formats (Belicious in the USA) and even in chocolate squares (La Maison du Chocolat), or even by hiding them in biscuits (as demonstrated by Hidden Garden).

► Towards personalized foods

A number of potential applications have already been identified for the more technical and scientific field of nutrigenomics, which evaluates the impact of nutrients on the genes. This will eventually make it possible to effectively support medical treatments and encourage the production of functional foods with a high nutritional value. Within the NUGO (Network for Integrating Nutritional Genomics Researchers), the European organisation operating within the sector, research laboratories are working on identifying individual responses to nutrients with the aim of adjusting recommended doses according to certain sub-groups determined based on three criteria, namely genetic variations, gender and stage of life. American companies have been riding this trend since the late 1980s, as demonstrated by

MetaProteomics, which evaluates the efficacy of natural ingredients on cell models and supports the nutraceutical industry by selling supplement products online. Cellf Genetic Assessments, for its part, markets genetic devices that make it possible to issue personalised health and nutrition recommendations through pharmacies.

Historically, the food-processing and technological spheres have always evolved hand-in-hand, meaning that when one takes a step forward, the other follows. Nowadays, for example, the world of smart, connected cuisine gives the consumer the ability to ultra-customise their meals, habits and foods, recipes, etc., whilst the 3D printing of foodstuffs is now being used to help the elderly and the sick and assist in the automated preparation of meals in the home.

► Parallel with pharma industry

These days, thanks to heavy investment, new innovations in the healthcare sector are becoming increasingly driven by 'ingredientists', who can introduce them to large numbers of clients. Furthermore, we are witnessing the emergence of start-ups specialising in 'ag tech' (agricultural technologies) and 'food tech'.

The parallel with the pharmaceutical industry is becoming more and more evident. Indeed, the preemption approach adopted by the big pharma companies, which involves accessing the knowledge embodied in promising patents and candidate drugs as early as possible with a view to revising the products they have in the pipeline, notably where biotechnological companies are concerned, is also emerging in other value chains such as the bio-food industry. Biotechnology firms have distinctive skills that put them on the level of partners to major traditional companies for the purposes of establishing a form of cooperation that more closely resembles coopetition than subcontracting. In these technology-based or science-driven sectors, the growth of biotechs depends on a business model that focuses on managing innovation and their incorporation into a virtuous circle driven by a series of key factors that include access to intellectual property (patents and licences) and venture capital funding, as well as strategic alliances and collaborations for the purposes of marketing their knowledge and expertise.

The suggested changes that we must make to our dietary habits in order to eat healthily must reflect simple and practical instructions if they are to be readily adopted by the consumer, hence the need for marketing that focuses on educating the consumer. One of the major issues with regards to promoting performance is that of counterbalancing consumer demands (pull) with technological innovation (push).

The development and indeed the success of these new approaches will be based on scientific evidence, interest and trust on the part of the consumer and the existence of an appropriate regulatory framework.

Innovation in the health nutrition and nutraceutical fields is becoming increasingly complex and is based on increased segmentation and challenges that are becoming more intense over time. ■

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