

International Macadamia Symposium 2023



IMS'23

MOVING FORWARD TOGETHER

Macadamias South Africa (NPC)
(SAMAC)



Consumer trends

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World Macadamia Organisation

New Nutrition Business tracks mega-trends and key trends over time

MEGA-TRENDS



KEY TRENDS



There are also changes in the way we shop

Seeking convenience

Consumers are buying food in more places, including food service outlets, and take less steps in food preparation when at home.

Ecommerce

Buying is shifting from shops to screens, although most consumers move across the channels.

The disappearing middle

Consumers are seeking value offers, and also more premium and lifestyle offers. The “middle of the road” brands and offers are facing the biggest challenges.

Why do trends matter?

Because the products and brands that connect to the long-term consumer trends are the ones that become sustainably successful.





Relevant trends for macadamias





Naturally functional

- Influences all other trends and all categories.
- Reflects that what people want, more than anything else, is for their foods and beverages and ingredients to provide a health benefit they perceive as natural and intrinsic to the food.
- **No health claim needed:** Naturally functional foods don't need to be backed up by scientifically-proven health claims.



How to use
ELDERBERRIES
Immune-boosting tea,
syrup & gummies



Naturally Functional is behind the success of almonds, pistachios, avocados, kale, turmeric, matcha, olive oil, blueberries, elderberries and many others.



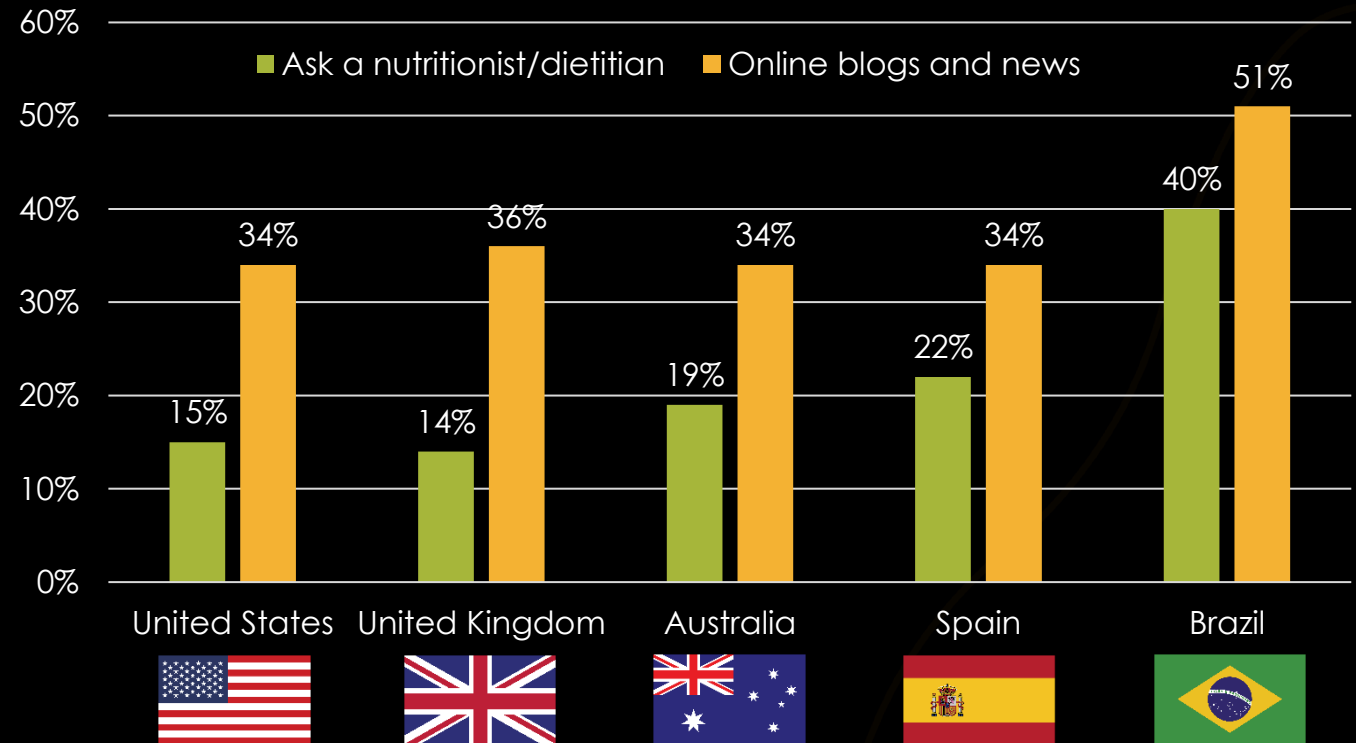


MEGA TREND: Fragmentation of people's beliefs about food & health

- Dr Internet is where people go first for their information.
- The huge diversity of information about health and nutrition on the internet helps drive diversity of consumer beliefs.

Consumers turn to Dr Internet for health and nutrition advice

"Where do you get your information about food and health?"





Source: NNB 5-country consumer survey 2022



Declining faith in experts thanks to changing – and often contradictory – messages has helped drive fragmentation of consumer beliefs about food & health

Changing views on saturated fat: from enemy to ally

<p>1961</p>  <p>Influential researcher Ancel Keys: "Eat less fat meat, fewer eggs and dairy products."</p>	<p>2022</p>  <p>"...there is no scientific ground to demonize SFA as a cause of CVD. SFA naturally occurring in nutrient-dense foods can be safely included in the diet".</p>
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≡ **MEN'S JOURNAL** No Shock Here: Lose Weight by Eating Less Fat

FOOD & DRINK

No Shock Here: Lose Weight by Eating Less Fat

≡ **MEN'S JOURNAL** Why Experts Now Think You Should Eat More Fat

HEALTH & FITNESS

Why Experts Now Think You Should Eat More Fat





Fat fuels growth

Fear of fat is receding – consumers are rediscovering that fat = flavour, and can even be good for health.

Satisfying taste and texture

More natural and less processed

Why consumers love full-fat products

Often lower in sugar than low-fat options

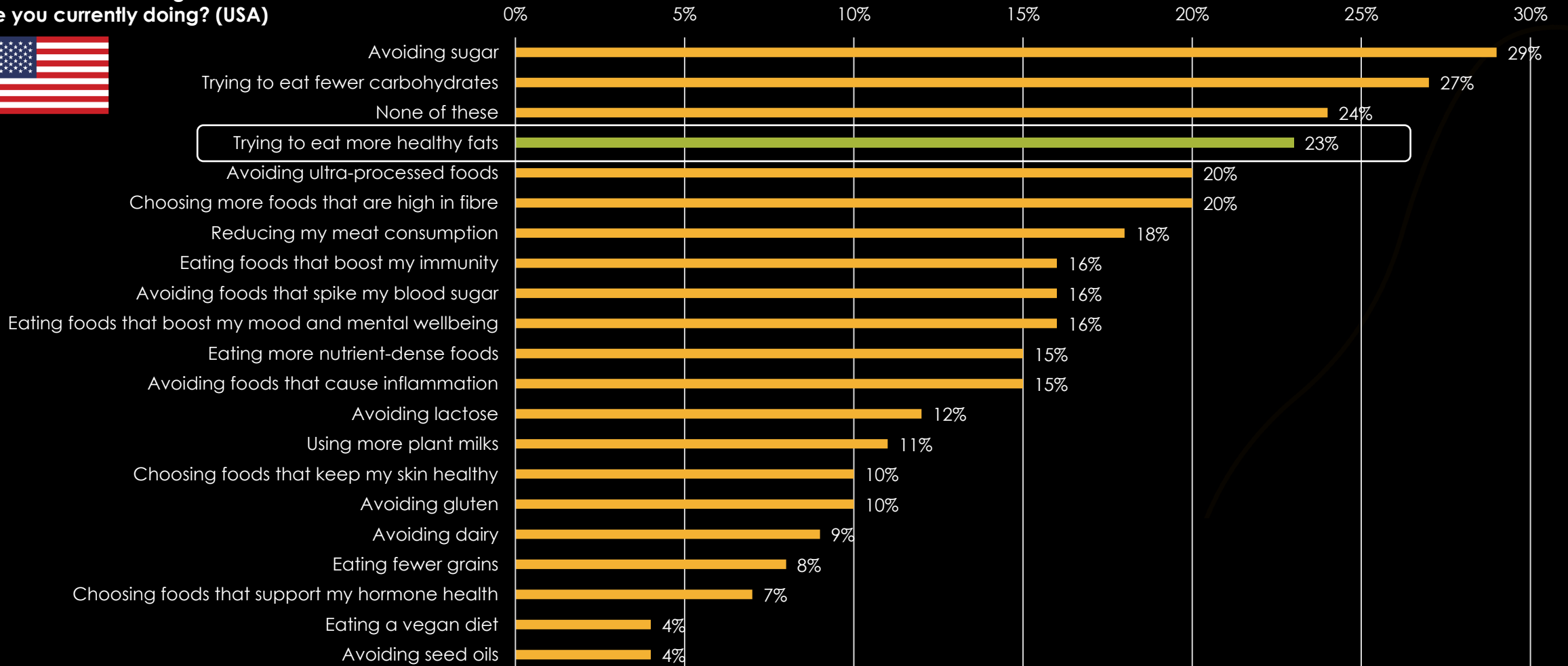
Growing science questioning previous dogmas

Fit in LCHF strategies for weight wellness



The number of US consumers choosing 'healthy fats' is steadily increasing.

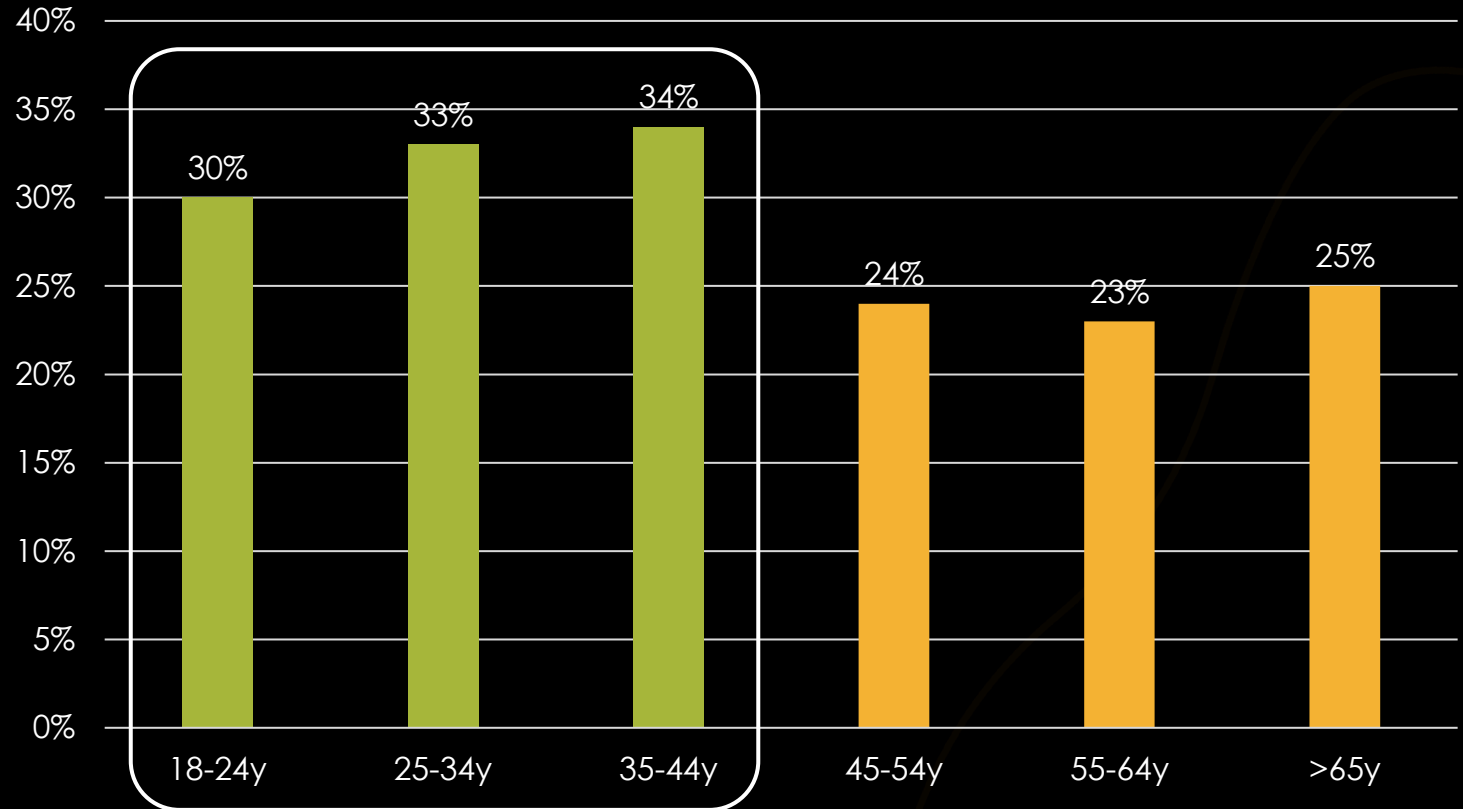
Which of the following are you currently doing? (USA)



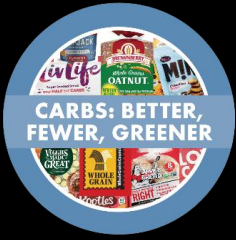


Younger consumers are more open to 'good fat' messages

- Younger consumers are more positive about fats.
- More younger consumers (below 44 years of age) are trying to consume healthier fats.
- The number is lower among older consumers, who have lived with the 'fat is bad' message most of their lives.

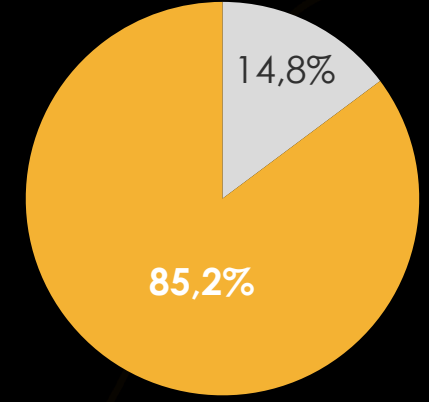
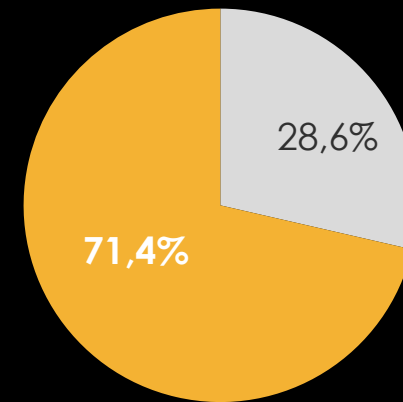
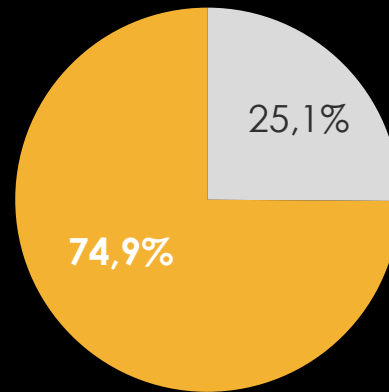
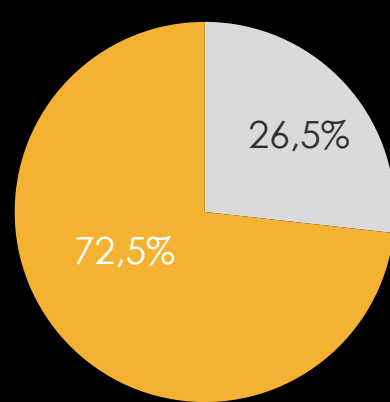
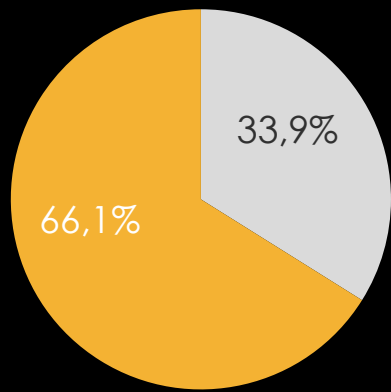



Source: NNB 5-country survey 2022, USA, UK, Australia, Brazil, Spain, n = 5,200



Hand-in-hand with 'more fat' is 'fewer carbs'

A long-term shift, fuelled by consumer interest in weight management and declining fear of fat.



 % of consumers who say they are trying to reduce their carbohydrate consumption

Emergent – better blood sugar



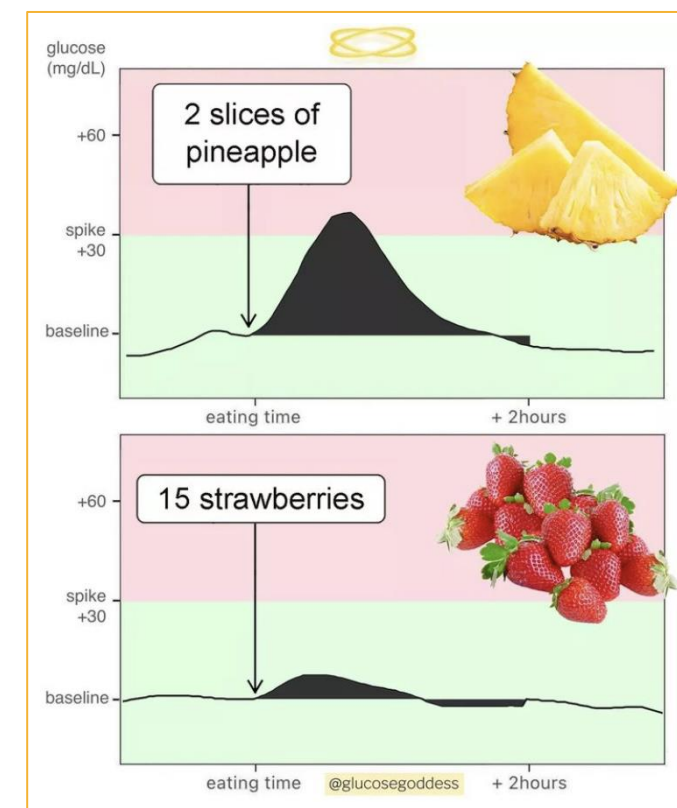
1. People who are trying to manage their blood sugar for weight management or because they are concerned about diabetes or for more energy.

2. **Untapped, pent-up demand from women** who feel their everyday struggles with hormonal health are dismissed or diminished by the medical profession and mainstream health experts. **This is reflected in the growing popularity of online information sources on the subject.**

glucosegoddess 1,186 Posts 2.1 M Followers 1,248 Following

Jessie Inchauspé
French Biochemist here to help you feel amazing
THE GLUCOSE GODDESS METHOD, my new book, is out now

- Eating almonds 30 minutes before meals reduced the glucose spike of the meal by 28% on average.
- It also improved insulin levels and other hormones that control glucose levels.





Emerging nutrient density

A long-standing concept in nutrition circles has been given new legitimacy – and is coming to the attention of more consumers.



New US dietary guidelines have put the spotlight on nutrient density - and companies have been quick to harness it.

Focus on meeting food group needs with nutrient-dense foods and beverages, and stay within calorie limits.

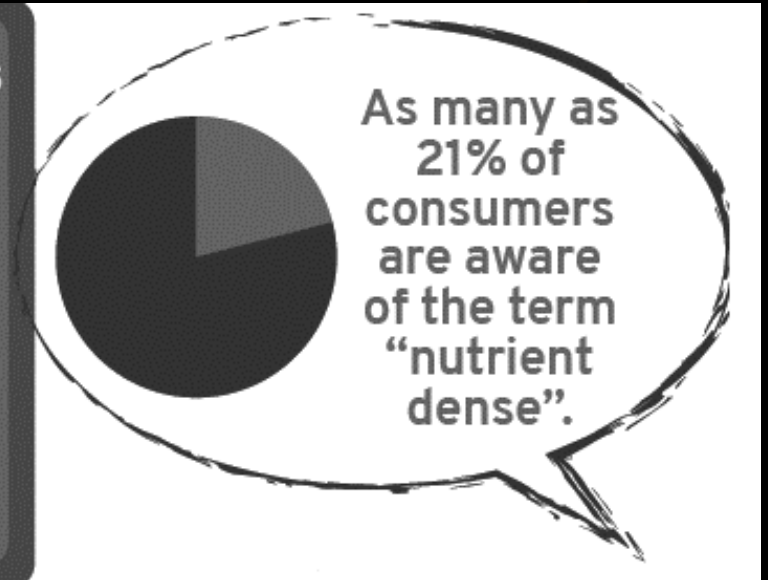
There are various technical definitions of “nutrient density”



What matters most is the definition in the mind of the consumer



Nutrient density encompasses many positive concepts for consumers (“real food”, soil health...)





Nutrient density

- Many foods are nutrient dense.
- Nuts are also a winner in the growing search for more nutrient dense foods.

Nutrient-dense vs nutrient-poor foods

Nutrient-dense foods examples

Cruciferous vegetables: kale, cabbage

Berries: blueberries, raspberries, acai, goji

Animal foods: salmon, fish, seafood, grass-fed beef, liver, bone broth, egg yolks, kefir, yoghurt

Legumes: beans, lentils, chickpeas

Whole grains: oats, rice, whole grain pasta

Nuts and seeds: chia, almonds, macadamias, flaxseed

Greens: spinach, broccoli, cauliflower, spirulina, asparagus

Fungi: mushrooms

Nutrient-poor foods examples

Ultra-processed foods: ready meals, chips, snacks

Confectionery: candies, gummies, desserts

Bakery: pastries, cakes, cookies

Drinks: sodas, alcohol

Source: NNB literature search



Macadamia demand can be much bigger because macadamias connect to long-term consumer trends





For WMO Members, more details on these trends and related opportunities for macadamias can be found on the WMO Members' Portal

www.worldmacadamia.com





QUESTIONS ?

