



The
Food & Drink
Innovation
Network

Innovating for Free-From

» *FREE-FROM AS A BUSINESS OPPORTUNITY, NOT A CHALLENGE*
September 11th
Sara Adams @ Happen.com



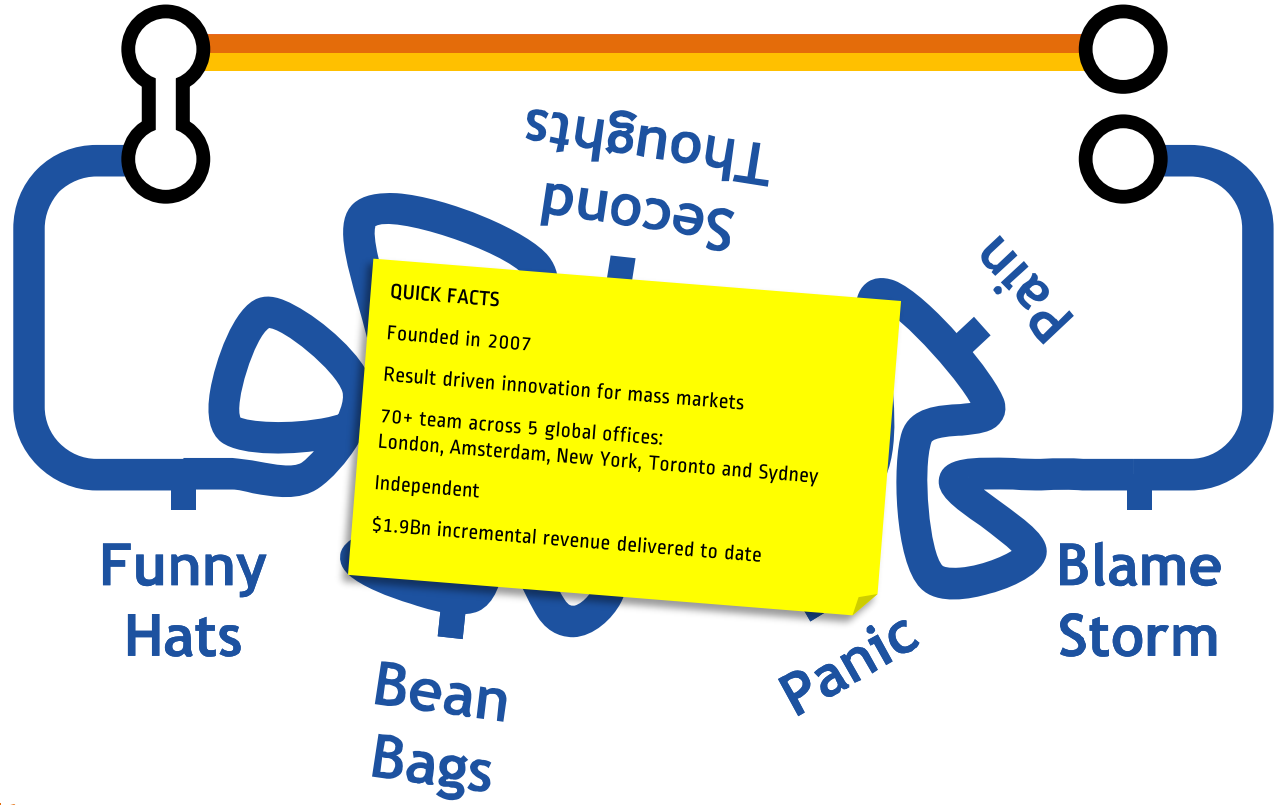
In the next 20 minutes

- » The FreeFrom Everywhere challenge: **Who** are we talking about?
- » Insights and trends – **Why** it's worth talking about this now
- » **How** to position allergen-free as a *positive* lifestyle choice.
- » **What** could be the market impact?
- » **How** to use your current assets to supply FreeFrom food & drink everywhere.
- » **What** to do? Five top tips for turning free-from into an opportunity rather than a challenge.

Happen® Group

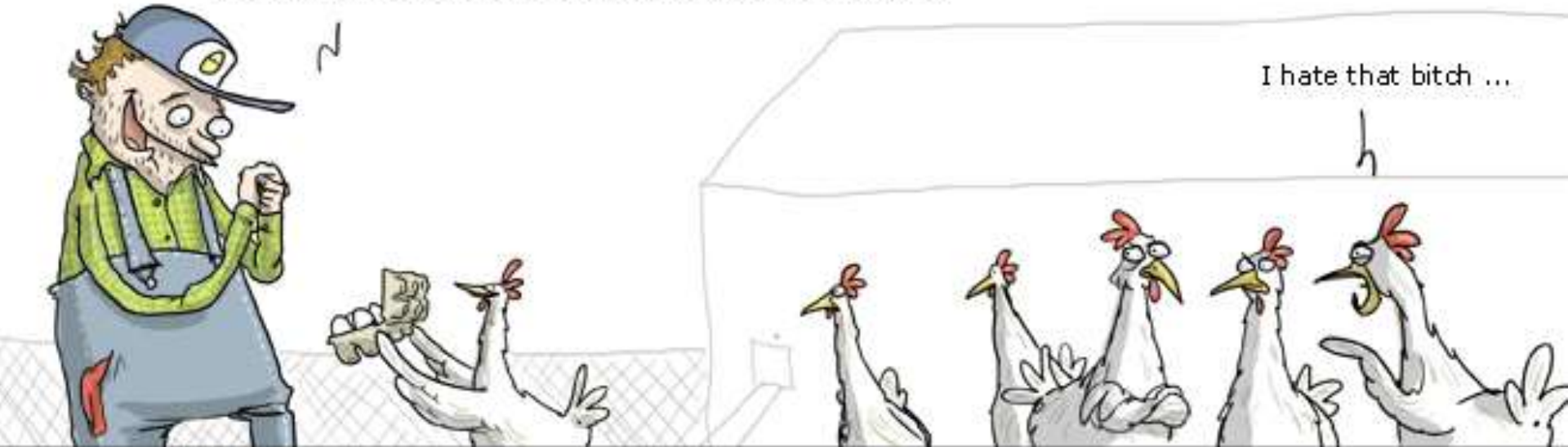
Mass Market Opportunity

Innovation Success



Our trade: successful differentiation in crowded markets

Wow, you've laid eggs AND packaged them!
How nice of you. You are definitely my favourite hen ...



Who? Tell me about yourselves...



WHO? A paradigm shift

Free from is not just for the super users

Who is interested in free from in food service

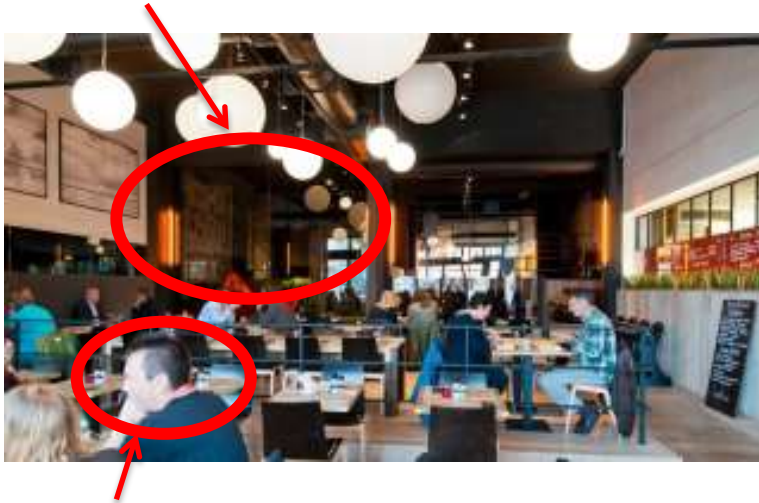
- **The Super Users, the “Cannots”**
prescribed lifestyle [diabetic, celiac] or identity users [halal, kosher, veggie]
- **The Lead Users, the “Rather Nots”**
vocal, loyal and drive business
- **Tag Along Users, those connected to super users or lead users**
follow suit, hidden volumes





Medical and identity users: a question of **INCLUSIVITY**

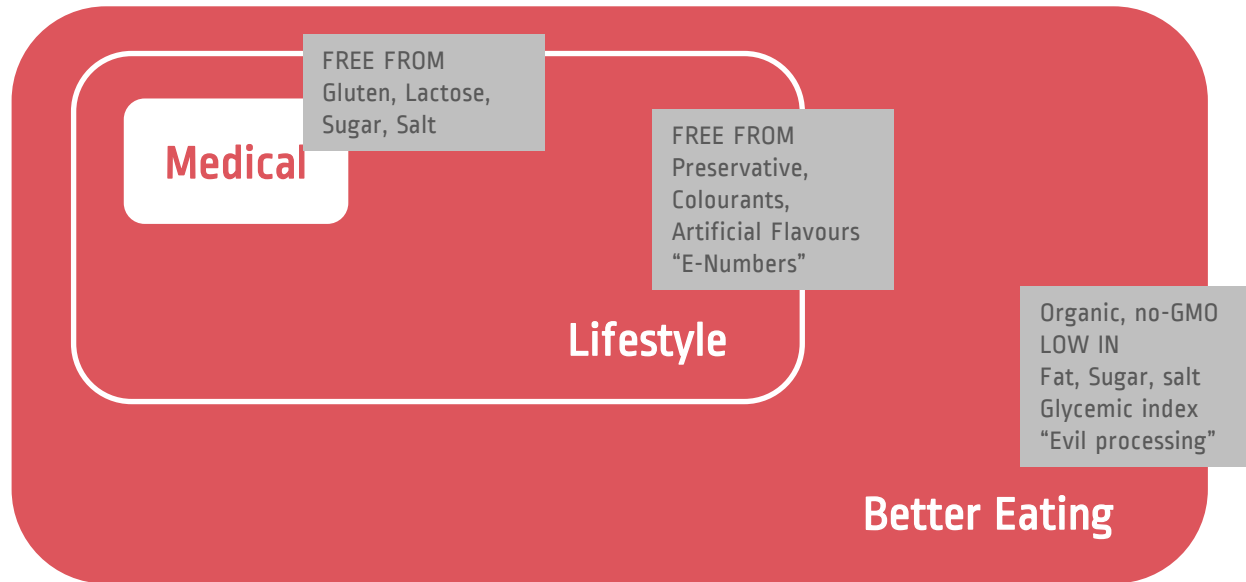
» Play room



» Relaxed parent

The Rather Nots (and their families): a **POSITIVE LIFESTYLE CHOICE**

Eating better – it's a TOWARDS motivation for "Rather Nots" as opposed to AWAY from motivation for "Cannots".



Trends: Gen Z

Gen Z - their protective parents are all about the reduction of risk and doing the best for their kids

“Two weeks ago I stopped giving her Gluten and I don't know if it is coincidence but she's stopped being so irritable and engaging more in play etc and wakes up happy”



Trends: cutting out not controlling

Pendulum has swung from too much to none
[eg 5:2 diet – it is easier to cut out than control]

Iv just eaten a big bowl of fruit & feel so good for it, iv cut out all c**p food ie: chocolate, bread [have wholemeal if i do have any], sweets etc etc
www.netmums.com

Diary of the 5:2 Fast Diet

Week 5

- * IT DOESNT FEEL LIKE A DIET
- * BEING ABOUT TO ENJOY FOOD WITHOUT "GUILT"
- * FEELING ENERGISED & FOCUSED
- * THE DISCIPLINE OF A FAST DAY SPILLS OVER INTO LIFE
- * FEELS LIKE SUCCESS
– NOT RESTRICTION

for more on the fast diet visit louisacclair.com

Trends: Nutritional density

According to Rosie Willis, the Pret a manger's Technical Development Manager, the drinks are proving "very popular" with customers. **"Sales are comfortably ahead of our initial projections,"** she says, adding that feedback on Twitter and Facebook is also **"hugely positive"**

<http://www.drinks-insight-network.com/>



Trends: Positive eating

“Here at Kallo, we don't think eating sensibly has to mean saying no to the things you love. We believe life is about what you can, not what you can't have and eating the right way is about loving food and living life in a positively fabulous fashion”



What eating out should be vs what it is

Eating out should be about having exactly what you want, with no stress involved.

But for:

The “**Cannots**” – difficulty, inconvenience and exclusion

The “**Rather Nots**” – compromise and peer pressure,

The “**Tag Alongs**” – hassle, inconvenience and guilt

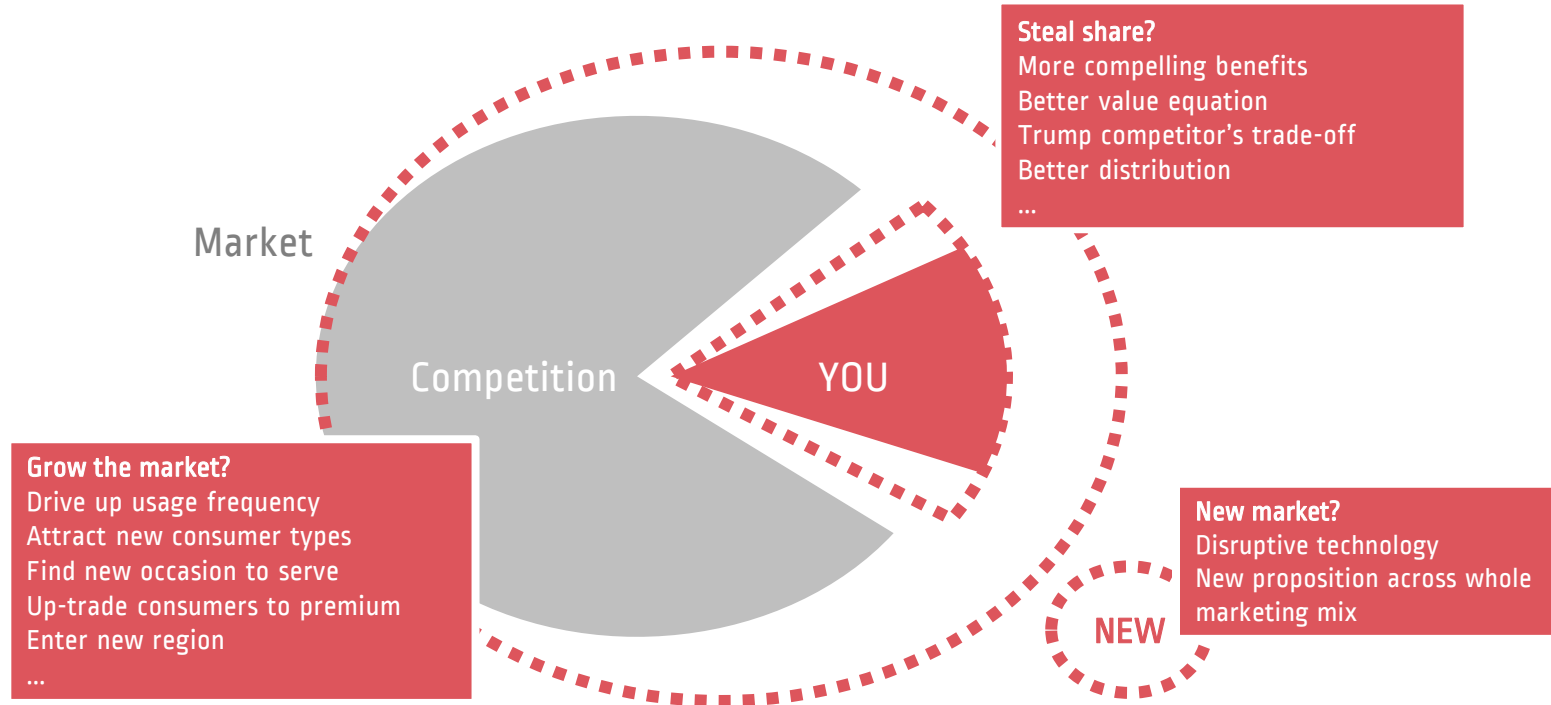
As a result:

Businesses are losing the whole family/ group – and the opportunity to become part of the repertoire, a ritual.



What? Free from everywhere: market impact

Steal share, grow the market and beyond!



How to use your current assets to supply FreeFrom food and drink everywhere

There are three levels at which you can get to work with this

1) Reframing what you currently have: product portfolio.

Your product portfolio is undoubtedly already free-from many various types of allergens [Cannots] and unfavourable compounds [Rather Nots].



How to use your current assets to supply FreeFrom food and drink everywhere

There are three levels at which you can get to work with this

- 1) Reframing what you currently have: **product portfolio.**
- 2) **Providing the support framework: apps & staff.** Not making free-from information available might well imply you're not even being considered. The Cannots and Rather Nots do their homework before buying, ask around and spread the word.



How to use your current assets to supply FreeFrom food and drink everywhere

There are three levels at which you can get to work with this

- 1) Reframing what you currently have: product portfolio.
- 2) Providing the support framework: apps & staff.
- 3) **Developing new foods & packaging**
 - Consideration 1: Upgrade existing recipes, single out a few or go whole hog? If you have multiple manufacturing sites, can you single out one?
 - Consideration 2: Make or buy? Do you want to own this expertise for it differentiation & market potential? Is the unwanted ingredient a barrier to your whole portfolio?



Five top tips to meet the Free From opportunity in food service

1. **Sell it in to the business** – by showing that this is going mainstream, you are no longer just talking to the medical minority. This is about consumers changing their diets and product repertoires along with it.
2. **Be positive** – this is about helping your consumers to make the best choices possible, not about excluding them from normal foods. Tap into their motivations and frame the choice positively.
3. **Be inclusive** – think *those connected* to your bullseye target users, family & friends. In out-of-home you'll create loyalty and become a preferred destination.
4. **Think Smart** – use what you already have by repositioning and apply filters to existing products and menus.
5. **Remember the cost of doing nothing** – the bandwagon is moving, customers are cutting out rather than lowering intake. **Don't let them go Free-From YOU!**

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