School of Natural and Environmental sciences

Newcastle University

Presentation prepared for the TRUE project Atlantic region network meeting

Pulse market trends, opportunities & challenges

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Outline

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- Pulses market outlook
- Alternative market channels
- New pulse based products
- Consumer segments
- Nutrition and Health claims
- Challenges & Research needs

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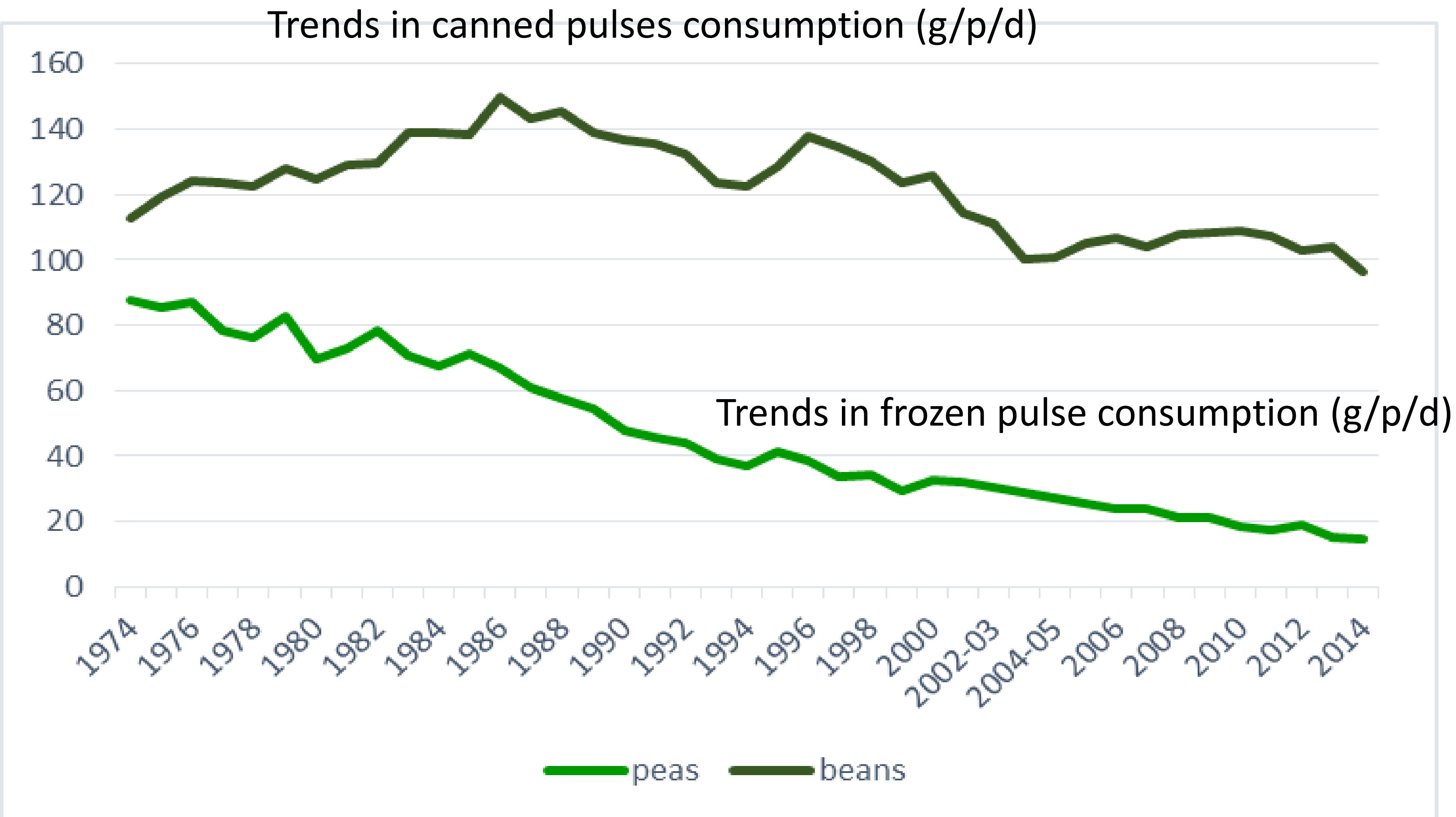
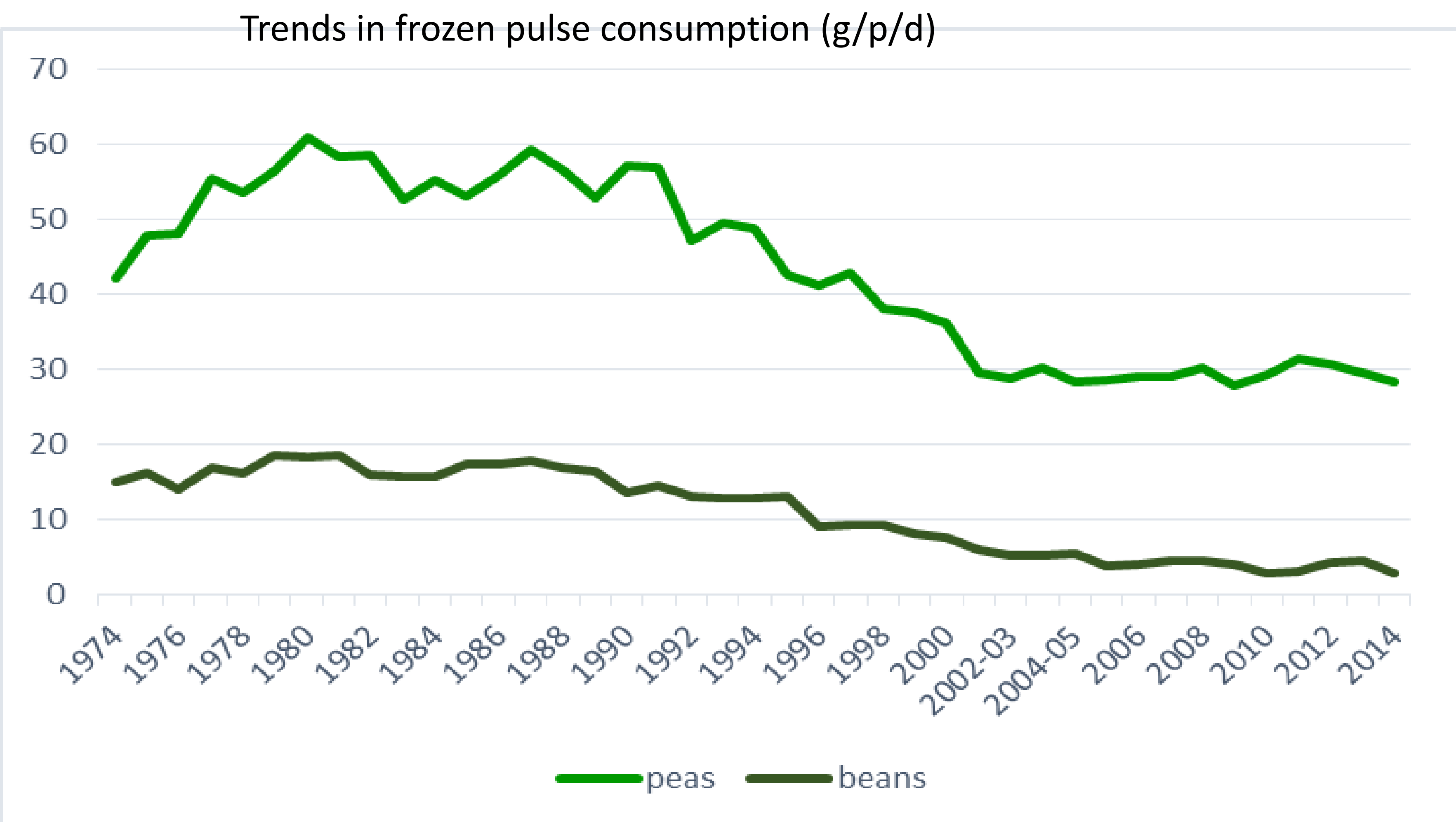
Canned peas are in decline, but canned beans are not!



Source: DEFRA 2015

Story inverts in the frozen category!



Source: DEFRA 2015

Market channels

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Sales of pulses by marketing channel
(% of Total Volume)

	2010	2011	2012	2013	2014	2015
Retail	89.0	88.0	87.5	87.0	86.5	86.7
Food service	10.6	11.4	12.0	12.2	12.5	12.3
Institutional	0.4	0.6	0.5	0.8	1.0	1.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor 2016

- Pulse based products have increased sales in retail
- But there is higher potential in **food service**
  - Expenditure on food away from home is close to 50% in the UK

Exponential growth of pulse based new products lines

Figure 1: Trends in new Pulse based products launches

Source: Mintel 2015

Snacks and Bakery leading innovation!

Leading categories using pulses as ingredients

Top 10 category (2011-2015)

	Category	Number of launches
1.	Snacks	289
2.	Bakery	204
3.	Processed Fish, Meat & Egg Products	202
4.	Side Dishes	126
5.	Soup	80
6.	Meals & Meal Centers	69
7.	Sauces & Seasonings	59
8.	Desserts & Ice Cream	29
9.	Savoury Spreads	14
10.	Chocolate Confectionery	13

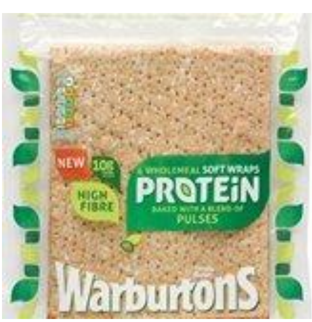
Source: Mintel, 2015

Pulses in new product lines

Meat substitutes

Soups

Snacks



Bakery products

Potential pulse consumer segments

Mintel (2017) found that 86% of British consumers tried or considered adopting a healthy diet!

Our research and Mintel data suggests there are 3 consumer segments looking for healthier, environmental friendly, ethical products:

1. Consumers with food related diseases

2. Flexitarians and ethnic consumers

3. Vegetarian and vegans

Perceived benefits & barriers

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Perceived Benefits	Perceived barriers
Healthiness	Image and recognition
Nutritional quality	Convenience of usage or preparation
Value (low cost)	Availability (how easy is it to find in shops)
Weight control and satiety	Anti-nutrients and flatulence

The 2016 Year of the pulse helped improve the image …
but more is needed!

Health and nutrition Claims

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- **Nutrition claims**

- **Comparative claims**

Potentially achievable but expensive

- **Health claims**

Claims already usable

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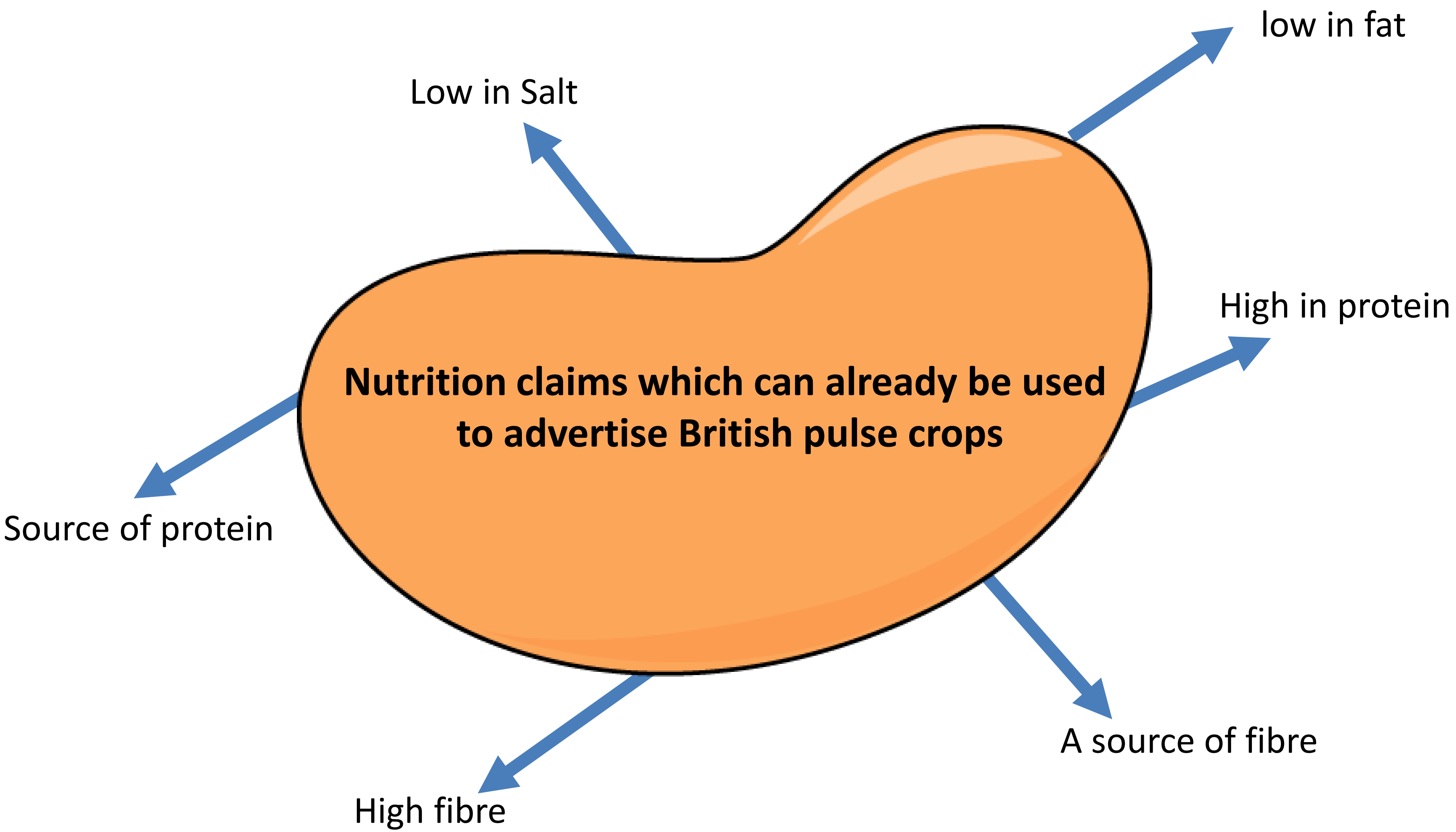

Challenges & future research

1) How to match new pulse products with emerging consumer segments?
2) Which nutrition and health claims are more valuable to consumers?
3) What are the consumption pattern of the flexitarian and healthy minded consumers?
4) How can we communicate pulse benefits to consumers?
5) What pulse tastes are acceptable or not to consumers?
6) What are the food technology challenges to successfully increase the use of British pulses in new product categories?

Thank you!

Any questions?

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