

Clean label trends in North America



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Introduction and Methodology

This report examines the topic of clean label in North America across the food and beverage market. North America is defined as Canada, Mexico, and the USA. The report has been compiled using FMCG Gurus proprietary data that can be found on its database. The report has a specific focus on what the key consumer need states are that are driving the clean label trend across the industry, and how this will continue to evolve in the wake of COVID-19.

When discussing the topic of clean label there are two important factors to take into consideration. Firstly, clean label remains very much an industry-led term, meaning that simply branding a product as clean label will not be enough to capture consumer attention. In fact, this is something that could be damaging to a brands image as a lack of transparency around the definition could mean the claim is deemed as nothing more than marketing language. Secondly, the underlying need states that are driving demand for clean label style products is nothing new, with natural claims being a high priority for consumers for decades in relation to food and drink. Instead what is different is that consumers want maximum transparency and validation of such claims. This is linked to consumers becoming increasingly concerned about the use of chemicals and artificial ingredients in products because of the impact it can have on them and the environment.

This report examines what issues are important to consumers when selecting food and beverage products and how promoting these product attributes are more important than defining clean label. In addition, the report will also examine how the clean label movement can interact with the sustainable diet trend to maintain relevance.



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Executive Summary

Although clean label is a phrase that has been touted around amongst food and drink professionals for at least a decade, it is something that remains very much an industry-led phrase. Indeed, most consumers in North America say that they have not heard of the phrase clean label in relation to food and drink. However, when given a definition, most consumers find the concept appealing. Whilst some consumers are skeptical to such products, overall, these products appeal because they are deemed to be healthier, better quality, and more sustainable.

These are need states that will intensify in importance over the next couple of years because of the threat posed by COVID-19. For instance, consumers are becoming more conscious about their eating and drinking habits as they look to maximize wellbeing, meaning they want to avoid ingredients that are deemed to be detrimental to their health. At the same time, consumers are also becoming more concerned about the state of the environment, especially as they believe it is something that has a direct impact on their health. As such, there will be a growing demand for products that are deemed to be green and clean over the next few years.

However, the reality is that the demand for clean label style products is not new at all. For instance, consumers have prioritized natural claims when seeking out food and drink for decades, with this product attribute being especially influential on willingness to pay a premium. This is linked to consumers wanting products that contain only real and authentic ingredients which not only offer nutritional value but are also purer, which in turn equates to superior taste. The only difference is that consumers want more transparency and authenticity around such claims.

The demand for transparency is linked to consumers becoming less trusting of the practices and policies of brands. This is because consumers can sometimes feel that brands do not have their best interests at heart and as such, can make misleading claims around health and sustainability issues to charge a higher price. Given that these two issues are central to natural formulation, it is understandable that consumers want brands to prove their credentials.

In terms of natural formulation and the importance of this, a key reason for this is because consumers are concerned about ingredients that sound chemical. This is because consumers can feel that such ingredients are not only damaging to their health but also the wider environment. As such, health conscious consumers are prone to checking nutritional labeling to ensure that products contain only ingredients that they recognize and which they deem trustworthy. If a product contains an ingredient that they believe sounds chemical, they can often be inclined to put the product back on the shelf.



Linked to all this is the importance of simplicity. Consumers can often have negative perceptions towards nutritional labeling. This is because they believe that brands can sometimes look to make labeling deliberately confusing to disguise the use of certain ingredients in products, or make products appear healthier than they are. As a result of this, consumers like products with fewer ingredients and with simplified nutritional information that allows them to easily monitor what is in the product.

The concept of clean label is something that will continue to appeal to consumers across all product categories, irrespective of whether they are deemed better-for-you or inherently associated with indulgence. Real and authentic ingredients are associated with a variety of favorable attributes such as products being tastier, healthier, and more sustainable because of the issue of purity, meaning such products will appeal irrespective of the category. This means that the brands need to continue to look for ways to offer transparency around ingredient claims.

Finally, the industry needs to capitalize on the growing demand for vegan, vegetarian, and flexitarian-style products. This is because such products are synonymous with the free-from trend that offers simplicity and transparency. Moreover, such products are often seen as stylish and a form of self-expression, meaning that claims such as vegan can give a product genuine identity and make products appear cool, something that will influence purchasing habits.

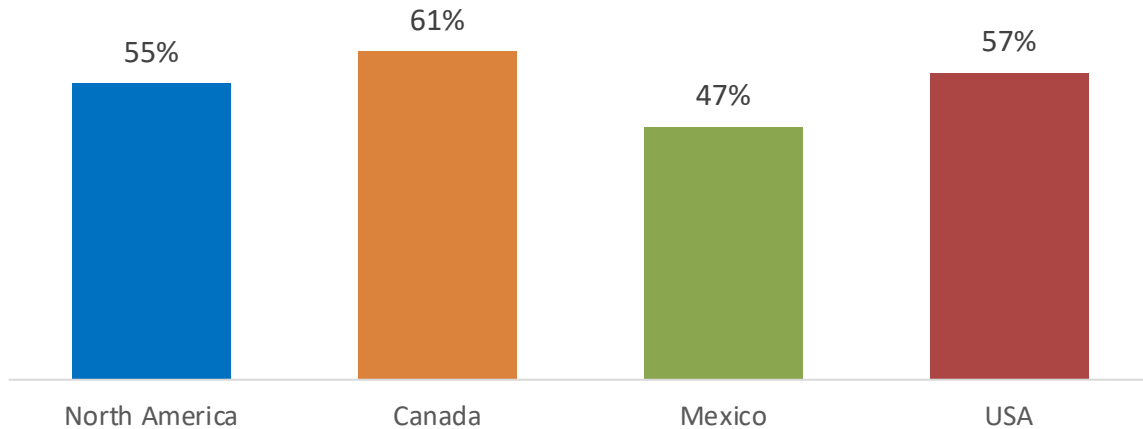
When launching such products, it is important that they are deemed to be affordable (especially in a recessionary environment) and are not seen to be making misleading claims in relation to formulation, health, or sustainability.

Demand for clean label products is being driven by the desire for real and authentic products

Whilst clean label remains an industry-led term, the need states of consumers is clearer

Over the last decade, clean label has been a buzzword that has dominated the food and drink industry, with brands looking for various ways to make products appear as clean as possible. Despite this, clean label remains very much an industry-led term with a lack of clarification surrounding what products are. Moreover, unlike the craft industry in North America, there is no stringent definition of what a clean label product is, something that ultimately increases the risk of the word being nothing more than an industry buzzword in the eyes of some. Whilst the industry continues to question what constitutes such a product, the reality is that a high proportion of consumers in the region have not heard the phrase before, as FMCG Gurus research conducted over the period 2019-2020 shows.

Proportion of consumers who say that they have not heard of the phrase clean label



Source: Clean Label & Naturalness survey Q1 2019/Q1 2020

Given that most consumers in North America say that they have not heard the phrase clean label in relation to food and drink, the reality is that priority should not be given to tightly defining what such a product is but instead, ensuring that new product launches align with evolving consumer need states when it comes to health, sustainability, and transparency. For instance, when FMCG Gurus gave consumers a definition of what such a product is, overall, it was seen favorably by consumers.

A clean label product can be defined as one that is “natural, contains only real ingredients and is synthetic free and is also free from artificial ingredients”

Proportion of consumers who say that such products sound appealing



Source: Clean Label & Naturalness survey Q1 2019/Q1 2020

When given a definition of what a clean label product is, a total of three quarters of consumers in North America say that such products are appealing, ranging from a high of 80% in Mexico to a low of 70% in the USA. FMCG Gurus attributes that some consumers may not have deemed such a concept appealing either because of skepticism about whether such products can be mass-produced, whether such claims would be misleading to charge a premium price, or if removing certain ingredients can compromise on the sensory appeal of products.

Of those consumers who say that they find clean label appealing, the three main reasons given for the popularity of such products related to offerings being free from additives, better quality, and healthier. Such products being deemed more environmentally friendly is also an important reason why such products are appealing.

Why do clean label products appeal to you? Consumers who say that such products are appealing

	North America	Canada	Mexico	USA
I am concerned about the use of synthetic ingredients used in products	47%	45%	37%	58%
I prefer products that are better quality	60%	69%	55%	56%
I prefer products that are free from additives	68%	88%	49%	67%
I prefer products that are fresh	46%	49%	37%	51%
I prefer products that are healthier	56%	79%	47%	42%
I prefer products that are more environmentally friendly	55%	68%	57%	40%
I prefer products that are natural	53%	57%	51%	49%
I prefer that I know the origin of the ingredients	44%	54%	35%	43%
I want maximum transparency over the ingredients used in groceries	41%	56%	22%	45%
Product contains recognized ingredients	53%	69%	37%	53%
Product is traceable/ ingredients can be sourced	40%	48%	32%	40%
Products are free from ingredients that are "bad" for me	44%	40%	40%	51%
Products are tastier	31%	51%	23%	19%
Products contain ingredients that are "good" for me	45%	53%	36%	47%
Other	5%	6%	3%	6%

Source: Clean Label & Naturalness survey Q1 2019/Q1 2020

- Additive-free:** Consumers are being attentive to the ingredients that are contained within the food and drink that they purchase. Like all other health and wellness related trends, such behaviors will intensify in a COVID-19 environment as consumers become more conscious about their health. With additives, consumers are concerned about the use of such chemical and artificial ingredients in products because they offer no nutritional value and can lead to long-term health problems. As such, consumers are making conscious efforts to avoid additives, driving demand for clean label style products.

- Quality:** Consumers are becoming more discerning of the products that they buy, expecting brands to push the boundaries of premium even for everyday food and drink offerings. When defining what constitutes good quality, ingredients are central to this. As will be highlighted later, consumers want ingredients that are natural, real, and authentic. Such ingredients are not only associated with being tastier, but also healthier, more sustainable, and more trustworthy. As consumers seek out products that they believe push the boundaries of indulgence, they are seeking out products that are free from chemicals and artificial ingredients.

- Healthier:** Consumers are conscious about what they eat and drink, especially as the rate of lifestyle-related health problems such as obesity and diabetes increases. Again, this attitude is something that will intensify in a COVID-19 environment. Whilst consumers are looking to improve their dietary habits to reduce vulnerability to disease and illness, they also do not want to compromise on the enjoyment element of eating and drinking. This is often why so many dietary plans fail. Clean label style products that are 100% natural and offer nutritional value are a keyway of marrying the need states of health and indulgence in a guilt-free and conveniently nutritious manner.

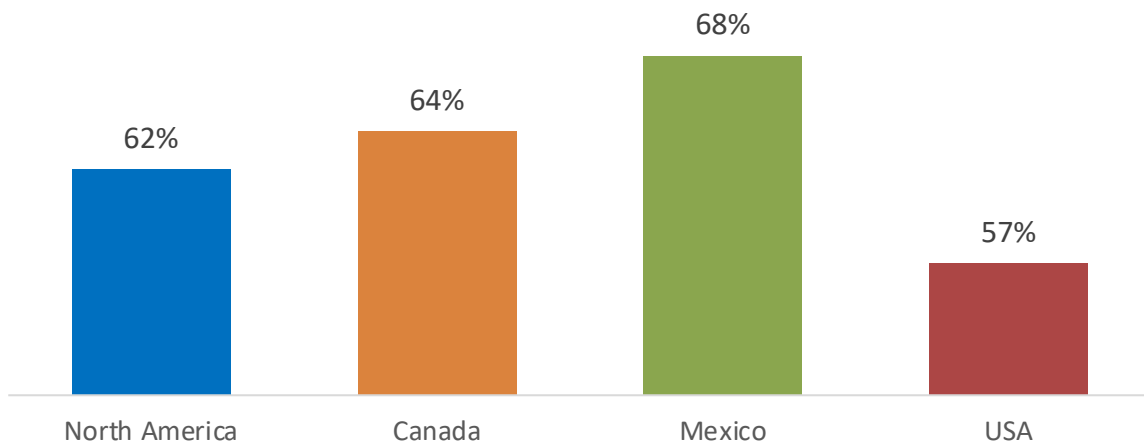
- Sustainability:** Consumers are adopting the notion of Good for Me, Good for the Earth. This is where consumers believe that the issues of sustainability and health and wellbeing are linked. Consumers are becoming more concerned about both issues and as such are changing their dietary plans to address this. This is driving demand for products that are chemical-free as chemicals are seen to be detrimental to health and the wider environment.

The clean label trend relates to consumers wanting more transparency around natural claims

Natural remains the priority for consumers in terms of product claims

Whilst much attention has been given to clean label, it is important to note that the underlying principles that are driving the demand for such products is not new at all. Instead, clean label is an evolution of the natural trend, with consumers simply wanting more transparency and authenticity around such formulation. Natural claims have been a high priority for consumers in North America for many years, especially in Mexico where food safety can be a big concern.

Proportion of consumers who say it is important that food and drink is 100% natural



Source: Clean Label & Naturalness survey Q1 2019/Q1 2020

The importance of natural claims will intensify because of COVID-19

In the wake of COVID-19, consumers are re-evaluating their eating and drinking habits as they look to maximize their wellbeing and reduce the risk of vulnerability to disease and illness. This is motivated in part by the recognition that dietary plans are not as healthy as they should be, something that could lead to health problems later in life. As a result of this, consumers will increasingly seek out products that promote these three product attributes. This is because these attributes are linked to health and safety:

- **Locality:** In times of uncertainty, consumers tend to demonstrate more ethnocentric attitudes, whilst also being concerned about products from another country. This is because consumers want reassurance about the safe handling of products along the supply chain whilst also being concerned about safety standards in other parts of the world. As a result of this, consumers want local products that they know and trust. This is due to local production being associated with being green and clean, making products good for the individual and the wider environment. Given that locality is a phrase that can be subjective in nature, it is crucial that brands validate any claims made.

- **Sustainability:** The importance of products being good for the individual and the wider environment will intensify because of COVID-19. This is due to two reasons. Firstly, consumers have a renewed sense of optimism that the environment can be repaired and secondly, consumers are assessing whether the impact of the virus may have been influenced by the state of the environment. Given that consumers believe that the state of the environment has a direct impact on their wellbeing, sustainability claims will be more important than ever before.

- **Natural:** When looking to improve their health and wellbeing, consumers will adopt a back-to-basics approach to nutrition. This means that whilst functional ingredients such as protein will be important for consumers, priority will be given to products containing real and authentic ingredients that offer a nutritional boost and are not detrimental to health. This is especially true as consumers will look to everyday food and drink that they know and trust to improve their diet.

Given that these three need states are interlinked, it is something that will drive demand for clean label products across the region over the next couple of years. As already mentioned, given the subjectivity that exists around these phrases, it is crucial that brands look to validate any claims made.

Proportion of consumers who say that they are being more attentive to natural ingredient claims as a result of COVID-19. 2020



Proportion of consumers who say that they are being more attentive to locality claims as a result of COVID-19. 2020



Proportion of consumers who say that they are being more attentive to sustainability claims as a result of COVID-19. 2020



Source: COVID-19 survey series, April-July 2020 (aggregated)

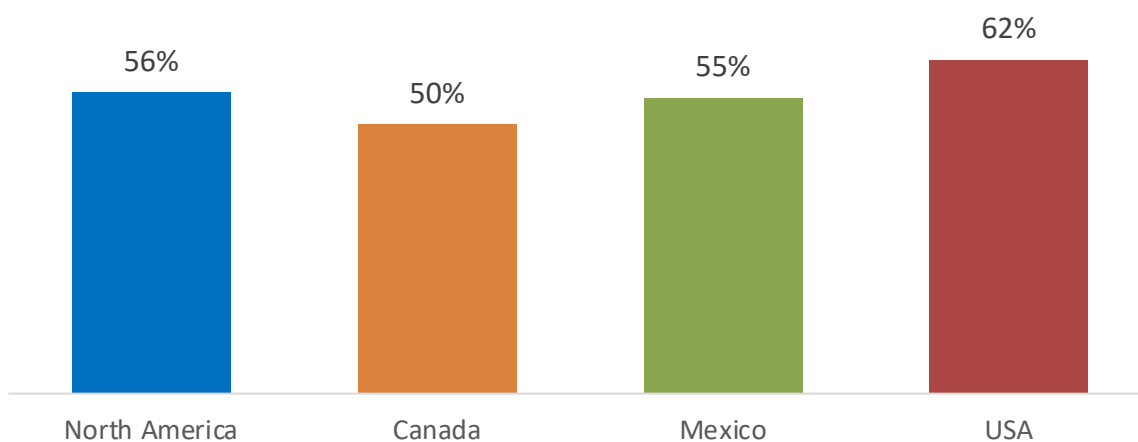
Consumers want maximum control over their nutritional intake

One key need state that is driving the demand for clean label style products is the issue of control. Indeed, consumers can accept at times that the products they turn to are not the healthiest. However, what is important is that they arrive at that decision themselves and are not being misled by nutritional labeling. This is something that they are less accepting of. As such, simplicity is key to transparency so that consumers can make informed decisions in a quick and easy manner.

One way in which consumers would like to see brands do this is through products having streamlined ingredient lists and a variety of free-from claims. This is a strategy that is becoming increasingly popular in product categories such as snack bars and is something that is paying dividends for some brands. After all, consumers are likely to decide more on on-pack claims rather than excessively monitoring ingredient lists. This means that if brands can list only a handful of ingredients on front of pack with a range of free-from claims, it is something that will be of high appeal to consumers.

When developing such a strategy, it is important that reducing ingredients within a product is not seen to be compromising on the quality of sensory appeal of the product.

Proportion of consumers who say the fewer ingredients in a product the better



Source: Clean Label & Naturalness survey, Q1 2019/Q1 2020

Consumers believe that brands are not fully trustworthy when it comes to making nutritional claims

One of the main reasons why consumers say that they want fewer ingredients in products and clean label style offerings is that they can often feel less than reassured about the credibility of nutritional labeling. Consumers say that they are prone to checking nutritional labeling on a regular basis. This is not surprising at a time when consumers are wanting to avoid dietary evils and ingredients that are deemed to be detrimental to their health.

Proportion of consumers who check nutritional labeling for artificial ingredients



Source: Clean Label & Naturalness survey Q1 2019/Q1 2020

However, consumers can often feel that these efforts to avoid artificial ingredients are being impacted by brands being deliberately misleading when listing nutritional information. Across North America, a growing proportion of consumers are becoming less trusting of food and drink brands, often believing that brands do not have their best interests at heart and are motivated more by corporate greed. As a result of this, consumers can feel that brands can often make misleading claims around the health, nutritional value, and sustainability benefits of products.

These feelings have been heightened in an age of information where there have been high profile cases of brands making claims about products that have later proved inaccurate. Examples of this include brands being accused of greenwashing via ethical and environmental claims and watchdog investigations that have shown that brands can make nutritional labeling misleading to hide sugar. All of this has led to consumers becoming more conscious about the actual ingredients in products and wanting nutritional information that is simple and transparent and trustworthy.

Again, this highlights the importance of control over nutritional intake in relation to the popularity of clean label style products amongst consumers. People are accepting that products may not be the healthiest and they are accepting of this, especially for consumption occasions motivated purely by indulgence. However, what they are less accepting of is nutritional labeling that they believe is intentionally designed to confuse people on issues such as health, nutrition, and sustainability.

Proportion of consumers who say that nutritional labeling is complex and confusing



Source: Clean Label & Naturalness survey Q1 2019/Q1 2020

Clean label brands need to capitalize on sustainable dietary plans

Consumers are changing their dietary plans to lead a more environmentally friendly lifestyle, driving demand for free-from claims

One question that is often asked in relation to a trend is how it will evolve, and the clean label movement is no exception to this. As highlighted earlier on in the report, the concept of clean label has been discussed for well over a decade within the industry whilst from a consumer perspective, wanting naturally formulated products is nothing new. Moreover, whilst this report has served to identify the underlying need states that consumers want in terms of such products, it must be remembered that consumers are demanding and constantly want new products. As such, clean label brands need to continue to look for ways to make products appear contemporary and modern and create stand out appeal. One way in which this can be done is through aligning products with the vegan, vegetarian, and flexitarian dietary trends which are becoming more popular amongst consumers.

Over the last couple of decades, consumers have become increasingly concerned about the state of the environment. Whilst previously they saw protecting the environment as more the responsibility of big business, increasingly this has been something of a collective effort between business and individuals. As a result of this, a total of 45% of consumers in North America say that they have make changes to their eating and drinking habits in the last two years to lead a more sustainable lifestyle. There are many strategies that consumers have taken to do this, ranging from cutting down on meat and dairy, to making greater efforts to avoid food waste and seek out more local products.

Proportion of consumers who say that nutritional labeling is complex and confusing



What changes have you made? Consumers who have made changes

	North America	Canada	Mexico	USA
Reduced/eliminated eating meat	40%	50%	59%	12%
Reduced/eliminated eating/drinking dairy	31%	33%	20%	41%
Reduced/eliminated eating fish	16%	19%	16%	13%
Followed a vegetarian diet	28%	28%	28%	28%
Followed a vegan diet	10%	12%	11%	9%
Turned to more local food and drink	44%	45%	23%	64%
Made greater attempts to reduce food waste	51%	73%	49%	32%
Eaten less processed food	29%	32%	42%	13%
Eaten more fresh food and drink	49%	55%	40%	53%
Made greater attempts to check out the environmental credentials of products	35%	45%	13%	47%
Other	9%	9%	11%	6%

Source: Clean Label & Naturalness survey Q1 2019/Q1 2020

When questioned about these sustainable diets, a total of 49% of North Americans also said that these diets were healthier. This resonates with the notion of green and clean and means that consumers will seek out more environmentally friendly products because they deem them to be beneficial to their health. As a result of this, clean label brands should increasingly look to incorporate claims such as vegan and vegetarian onto packaging.

Ethical elitism is something that will increase willingness to pay a premium

When adopting sustainable dietary plans, this is something that is often done for self-expressionist purposes. Indeed, consumers want products that reflect their attitudes and outlook on life. Moreover, they want products that they feel have a genuine sense of identity. In many instances, plant-based diets are not just seen as something that is necessary to improve health and save the environment, but in addition something that is trendy and cool. This is especially true in an era of social media where consumers like to upload pictures of food and drink on to sharing platforms. As mentioned in the previous section of the report, clean label brands should look to take inspiration from the growing popularity of products that are specifically positioned around being suitable for vegan and vegetarian diets. In many instances, the claims on these products align with the basic principles of clean label products. In addition to this, the coolness element of vegan, vegetarian, and flexitarian diets is something that will increase willingness to pay a premium for products – something especially important in a recessionary environment. To capitalize on this, clean label products can be positioned around the following traits

- **Trendy and cool:** Clean label products should be positioned not just as something that is important for health and the environment, but something that is fun, fashionable, and elitist. After all, self-expression is important to many consumers, whilst some can sometimes believe that better-for-you products are bland and boring. As such, clean label products need to be deemed as aspirational.
- **Niche and artisan:** Consumers tend to be more trusting of smaller, craft type products because they are more likely to believe that such brands have the best interest of the consumer at heart. As such, clean label products should look to highlight craft production techniques via story-based marketing to offer authenticity and reassurance that maximum care and attention has gone into products – and that products are chemical free.
- **Anti-Corporate:** At the other end of the spectrum, consumers can tend to believe that bigger brands are lacking in identity and do not reflect their attitude and outlook on life. Moreover, they can also feel that brands that have a corporate image are less trustworthy. As such, consumers want brands to demonstrate real behavioral traits that they can link to. From a clean label perspective this is especially important from a packaging perspective, with consumers wanting fun and friendly packaging.
- **Altruistic:** Consumers are re-prioritizing what is important to them in life. This is especially true in the wake of COVID-19. As such, the concept of non-material wealth is becoming important to consumers and they are seeking out brands that match their attitudes and outlook on life. This means that it is important that brands demonstrate traits such as kindness and compassion. From a clean label perspective, these traits are something that will directly shape perceptions of formulation, with many feeling that brands that demonstrate such traits are likely to adopt this mindset when making products, such as avoiding chemicals because they can be damaging to the environment.

Conclusions

Rather than focusing on defining what clean label is, brands should look to understand what the key principles are that make such products appealing in the eyes of the consumer. That is, consumers want products that they deem to be 100% natural and contain only ingredients that offer a nutritional boost. Related to this, consumers want products to demonstrate other attributes such as local production and sustainability benefits. Such products are deemed healthier, tastier, safer, and better quality amongst consumers, which is paramount in a pandemic environment.

As such, priority for brands should be on offering maximum transparency around claims. Consumers can often be skeptical about the practices and policies of brands, especially in relation to claims that can sometimes be deemed ambiguous. As such, brands need to look for ways to offer maximum transparency and authenticity to offer reassurance around such claims. This is something that can be achieved through strategies such as using story-based marketing or becoming early adopters of blockchain technology that allows consumers to find out information about all aspects of the supply chain.

Related to this, it is also crucial that brands adopt a cradle-to-grave approach to sustainability, which includes monitoring the supply chain of its suppliers. This is to avoid any circumstance where brands make claims about ethical and environmental credentials which are later deemed misleading because of practices they were unaware of along extended supply chain.

In terms of transparency, another important issue for brands is to ensure that they do not over-promote the health benefits of clean label products. In a pandemic environment, consumers are becoming more conscious about their health and eating and drinking patterns and as a result, are adopting a back-to-basics approach towards nutrition. This means that it is important that products are free from chemicals that are deemed to be detrimental to health. However, when promoting products around containing real and authentic ingredients and that offer a nutritional boost, it is crucial that brands are not seen to be making misleading claims around how healthy a product is. For example, it is important that clean label products are not seen to be a magic bullet health solution for addressing issues such as immunity.

When launching clean label products, simplification and transparency is key. Brands should look to streamline ingredient lists when they can, ensuring products containing only real and authentic ingredients. However, it is important that brands are not seen to be omitting ingredients from lists at the expense of sensory appeal and quality. In addition to this, consumers want nutritional labeling to be as simple as possible. This is because consumers want reassurance that brands are not looking to disguise the use of certain ingredients in products. Indeed, consumers can be accepting that sometimes products are not the healthiest, however they are less accepting that they are being misled in terms of nutritional content.



Clean label brands also need to factor in the issue of affordability when launching clean label products. After all, consumers have high levels of concern about the impending recession faced and their financial status because of COVID-19. This is directly impacting on shopping habits, with consumers looking to stave money off their shopping bill when they can. This is a challenge for clean label brands given that healthier products are often associated with commanding a premium price. As such, brands need to look for ways to reassure consumers about maximum value for money when convincing them to pay extra for products or look for ways to make products as affordable as possible.



Going forward, clean label brands need to align with the growing proportion of consumers who are switching their diets to lead a more environmentally friendly lifestyle. This trend is driving demand for products that carry free from claims and are specifically positioned around claims such as suitable for vegan and vegetarian diets. Indeed, these claims are arguably more influential than claims such as organic when reassuring consumers around formulation. Moreover, if clean label products can be positioned around self-expression and ethical elitism, it is something that can increase willingness to pay a premium for products.

Appendix

FMCG Gurus used the following survey series for this report:

- Clean Label and Naturalness survey series (Conducted Q1 2019/Q1 2020) – 4,000 respondents across Canada (1,000), Mexico (1,000) and the USA (2,000)
- COVID-19 survey series (Conducted April, May, and July 2020) – 4,000 respondents across Canada (1,000), Mexico (1,000) and the USA (2,000) per wave
- Sustainability survey series (Conducted Q3 2019) – 3,000 respondents across Canada (1,000), Mexico (1,000) and the USA (1,000)

Demographics

	Male	Female	18-24	25-34	35-44	45-54	45-64	65+
Canada - Clean Label & Naturalness	49%	51%	14%	18%	15%	15%	13%	26%
Mexico - Clean Label & Naturalness	49%	51%	20%	24%	11%	17%	11%	17%
USA - Clean Label & Naturalness	49%	51%	11%	18%	21%	20%	13%	18%
Canada - COVID-19	49%	51%	13%	21%	15%	17%	12%	22%
Mexico - COVID-19	50%	50%	12%	22%	16%	16%	14%	20%
USA - COVID-19	48%	52%	13%	20%	15%	15%	13%	24%
Canada – Sustainability	50%	50%	10%	15%	17%	17%	17%	25%
Mexico – Sustainability	52%	48%	15%	17%	18%	15%	11%	24%
USA – Sustainability	52%	48%	11%	16%	17%	18%	17%	22%

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FMCG Gurus provides market research and insight into consumer attitudes and behaviours across the food, beverage and supplement markets around the world.

