



# The evolving world of “clean label”

If there was ever a loaded term in the food and beverage space, “clean” would certainly be a top contender.

While the idea of “clean label” was first associated with recognizable and naturally perceived ingredients on a short, simple ingredient list, the concept has now come to be associated with a broad range of important trends, including sustainable and transparent sourcing, plus organic and unprocessed, just to name a few. In fact, one could argue that for consumers, the idea of “clean” eating transformed into a lifestyle that supports eating healthy for both humans and the planet.

“Clean” undoubtedly is becoming a new baseline for product development, with the global market for these label-friendly foods now estimated at \$180 billion in 2020, according to Euromonitor International,<sup>1</sup> and the label-friendly ingredient market predicted to jump from \$38.8 billion in 2018 to \$64.1 billion by 2026.<sup>2</sup> But for brands, producing a label-friendly product now involves many layers of

complexity – from developing traceable supply chains to addressing the challenges of reformulating products with label-friendly ingredient alternatives.

It doesn’t help that “clean label” is not well-defined. Similar to other mega-trends, consumers are now shaping their own personal definitions of what it means to eat “clean”... while doubling down on broader concepts around “clean,” according to a new study on consumer perceptions about food ingredients from the International Food Information Council (IFIC). Consumers, for example, are definitely paying attention to ingredients, according to the report, with two in three saying ingredients have at least a moderate influence on their food and beverage purchases, and 63% noting they “somewhat” or “strongly” agree that they pay more attention to the ingredients on food and beverage products than they did five years ago.<sup>3</sup> In fact, more than half now say they look for label-friendly ingredients.

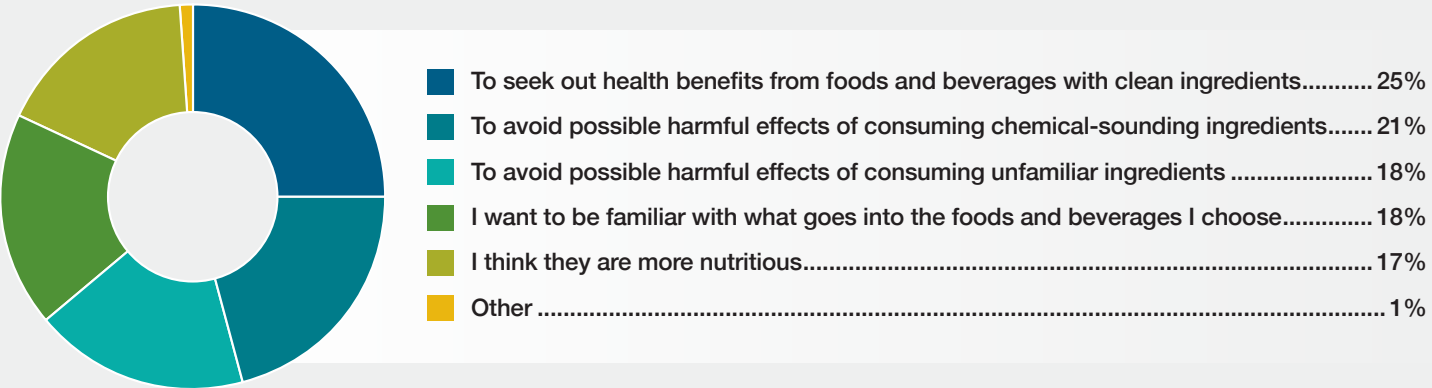
## Consumer perspectives on ingredients

	Strongly agree	Somewhat agree
I try to choose foods and beverages with clean ingredients whenever I grocery shop in person	26%	32%
I try to avoid buying foods and beverages with chemical-sounding ingredients	25%	31%
I try to choose foods and beverages with clean ingredients whenever I grocery shop online	22%	26%
I consider myself to be a “clean eater”	18%	28%

Source: International Food Information Council. “From ‘Chemical Sounding’ to ‘Clean:’ Consumer Perspectives on Food Ingredients.” June 2021.

## Why do you choose foods and beverages with label-friendly ingredients?

**Perceived health benefits** tend to be a top reason consumers choose label-friendly food ingredients; however, the connection between label-friendly ingredients and health benefits is not clinically proven.



Source: International Food Information Council. “From ‘Chemical Sounding’ to ‘Clean:’ Consumer Perspectives on Food Ingredients.” June 2021.

What’s more, nearly half of those who characterize themselves to be “clean eaters” define the term as eating foods that are not highly processed, with fresh, organic and simple ingredients also ranking high among these shoppers, according to the IFIC survey.

That noted, the concept of label-friendly products is moving beyond the perceived idea of health and nutrition to include a more holistic view of wellness, which includes both food safety and transparency.<sup>4</sup> At the same time, Euromonitor analysts suggest that the perceived link with health is strong enough that it is not likely to be broken – even as the term continues to be reinvented.

The last couple of years have also increased the focus on transparency, food safety and sustainability under the “clean label” umbrella. The connection was evident in early 2020 when a survey by FMI–The Food Industry Association and Label Insight noted that consumers linked the idea of transparency with a complete list of ingredients (62%), ingredients described in plain English (53%), certifications like USDA organic (48%) and in-depth nutritional information (47%).<sup>5</sup>





## All the right stuff

The good news for brands and product formulators is that label-friendly ingredient solutions have become more effective in the last few years, addressing these demands along with potential product functionality issues of taste, texture, shelf life and cost.

Consider stevia-based sweeteners, which have a natural perception among consumers and can achieve sugar reductions of 50% or more. In addition, suppliers are pushing the envelope to produce stevia-based ingredients in ways that are more sustainable and traceable than ever. Cargill's next-generation stevia sweetener, EverSweet®, uses fermentation to sustainably produce the sweetest components of the stevia leaf, Reb M and Reb D, which can enable up to 100% sugar reduction. Taking that innovation a step farther, Cargill recently introduced EverSweet® stevia

sweetener + ClearFlo™ natural flavor, a groundbreaking solution for fully utilizing stevia sweeteners' sugar-reduction potential without off-notes. EverSweet + ClearFlo combines stevia sweetener plus natural flavor in a single solution to significantly impact flavor and sensory performance, while dramatically enhancing stevia's solubility.

Other ingredients in the sugar reduction space include sugar alcohols like erythritol, which is present in some vegetables and berries and made commercially via fermentation. Other important options include hydrocolloids such as gums and pectins with thickening and stabilizing properties; food enzymes to address texture, shelf life and healthfulness; as well as fruit and vegetable pieces and powders that provide sweetness, color and flavor.<sup>6</sup>

The concept of plant-based ingredients is another growing trend for label-friendly products, with all things plant-based seeing increased momentum among consumers.<sup>7</sup>

Cargill's latest innovation combines our next-generation EverSweet® stevia sweetener and ClearFlo™ natural flavor in a single solution for enhanced sweetness and sensory performance with dramatically improved solubility.

**EverSweet®  
+ ClearFlo™**  
Stevia Sweetener + Natural Flavor



## The future of “clean”

Ultimately, consumers want it all when it comes to the foods and beverages they purchase – from recognizable ingredients to sustainable and transparent production. There’s a growing upside for brands that can capitalize on a wide range of these “clean” characteristics.

But with this expanding interest comes additional label-claim scrutiny. In the plant-based product space, for example, The Hartman Group found that experimentation and demand for these products brought greater consumer analysis of ingredients and processes, noting that more-evolved wellness consumers, in particular, will not take product claims at face value.<sup>8</sup>

Looking ahead, this means communication about label-friendly properties will be critical. According to findings from Innova Market Insights, attributes that have long been associated with label-friendly, such as zero additives and minimal processing, will still be important, but the definition of “clean label” is expanding beyond

the product itself to ethical and environmental attributes around its production.<sup>9</sup>

It will be important to communicate these ideas in ways that are both meaningful and verifiable, including use of certifications and demonstrable concepts like use of recyclable packaging materials.<sup>10</sup>

As consumers become more astute about shopping and buying online, their ability to research and choose label-friendly products will grow, so they’ll be looking for deep information and strong storytelling about a product’s label-friendly attributes.

**Learn more** about Cargill’s industry-leading resources for label-friendly formulation at [cargill.com/labelfriendly](https://cargill.com/labelfriendly).

EverSweet™ is a product of Avansya, a joint venture of DSM and Cargill.

<sup>1</sup> Euromonitor International data in Brewster, E. “The Changing Face of Clean Label.” Institute of Food Technology’s *Food Technology Magazine*. September 1, 2021. <https://www.ift.org/news-and-publications/food-technology-magazine/issues/2021/september/columns/ingredients-clean-label>

<sup>2</sup> Allied Market Research. “Clean Label Ingredients Market By Type, Application and Format: Global Opportunity Analysis and Industry Forecast 2019-2026.” July 2021. <https://www.alliedmarketresearch.com/clean-label-ingredients-market>

<sup>3</sup> International Food Information Council. “From ‘Chemical Sounding’ to ‘Clean’: Consumer Perspectives on Food Ingredients.” June 2021. Food-Ingredients-LSI-Survey-May-2021.pdf (foodinsight.org)

<sup>4</sup> Euromonitor International. “Clean Label from Health to Transparency.” March 2021.

<sup>5</sup> “New Research from FMI and Label Insight Reveal Omnichannel Grocery Shoppers See Transparency as Essential Across In-Store and Online Shopping Channels.” June 23, 2020. <https://www.prnewswire.com/news-releases/new-research-from-fmi-and-label-insight-reveals-omnichannel-grocery-shoppers-see-transparency-as-essential-across-in-store-and-online-shopping-channels-301081610.html>

<sup>6</sup> Wilson, R; Walter, P. “How the Clean Label Megatrend is Changing the Food Ingredients Landscape.” LEK Consulting. <https://www.lek.com/sites/default/files/insights/pdf-attachments/2174-Clean-Label-Food-Ingredients.pdf>

<sup>7</sup> The Hartman Group. “Scrutiny of Plant-Based Ingredients and Labeling an Ongoing Consumer Priority.” June 1, 2021.

<sup>8</sup> <https://www.hartman-group.com/newsletters/367376129/scrutiny-of-plant-based-ingredients-and-labeling-an-ongoing-consumer-priority>

<sup>9</sup> Ibid.

<sup>9</sup> Innova Market Insights. “Transparency Triumphs in Building Trust and Safeguarding Brands.” May 26, 2021.

<https://www.innovamarketinsights.com/press-release/transparency-triumphs-in-building-trust-and-safeguarding-brands/>

<sup>10</sup> Innova Market Insights. “Successfully Communicating Sustainability Leads the Top Packaging Trends.” June 10, 2020.

<https://www.innovamarketinsights.com/press-release/successfully-communicating-sustainability-leads-innova-market-insights-top-packaging-trends/>

**Claims:** The labeling, substantiation and decision making of all claims for your products is your responsibility. We recommend you consult regulatory and legal advisors familiar with all applicable laws, rules and regulations prior to making labeling and claims decisions.