



## TRANSLATING “CLEAN” INTO GREEN:

How ingredient perceptions  
can influence purchase decisions

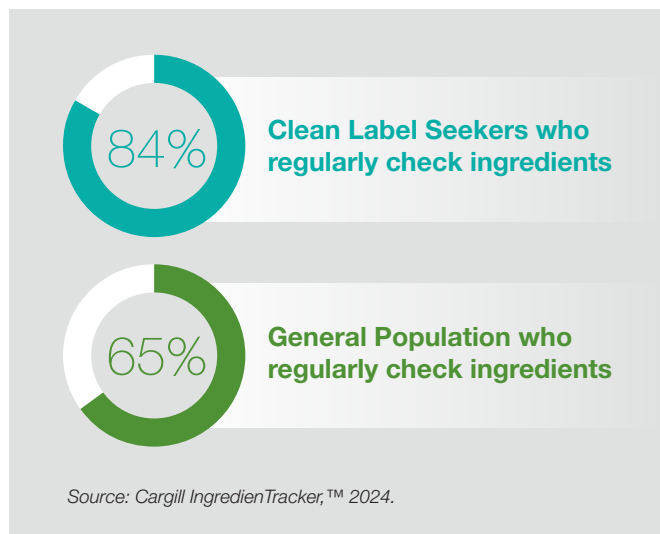
Label-friendly formulation remains a top trend, influencing nearly every segment of the food and beverage landscape... but hitting the “clean label” sweet spot in the snack and bakery aisles isn’t always easy.

With no hard-and-fast definitions or clear-cut consumer motivations, it often feels like aiming at a moving target. For some consumers, it represents a desire for more “natural” foods; others scrutinize labels hoping to make more-healthy choices – whether for themselves or the planet. Still, some themes consistently rise to the top. Most universal of these is the idea of products made with familiar (or at least understandable) ingredients. But increasingly, label-friendly perceptions may extend to how those ingredients are sourced, processed and whether they are sustainably sourced.

### Ingredient insights

Cargill proprietary research offers additional insight into consumer behaviors and perceptions as it relates to ingredients and package labels. It finds that consumers continue to lean into “clean eating,” using claims like “natural,” “organic,” “non-GMO,” or “free-from-artificial” to navigate toward products they perceive as more aligned with their individual needs.

A subset of American shoppers, which Cargill has dubbed “Clean-Label Seekers,” are especially attuned to label scrutiny. In the company’s most recent IngredienTracker™ survey, which measures consumer attitudes towards more than 300 ingredients, this psychographic segment represented 41% of all participants, a percentage that has held steady in recent years. As a group, they are more educated, more affluent and far more scrutinizing than the general population, with 84% reporting they are “extremely” or “very” likely to check ingredients.



However, there’s one thing the majority of consumers agree on – and that’s concern about sweeteners. The Cargill survey assessed more than 40 sweeteners, but only six ranked as being sought out by consumers. Another six were deemed to have a neutral-to-positive impact on purchase, but the remaining sweeteners led to consumer avoidance.

On the plus side, honey remains the gold standard for sweeteners; it’s highly sought out and its consumer perception scores in the Cargill survey have only grown more favorable in recent years. Stevia and stevia leaf extract also rank more positively than most sweeteners, while artificial sweeteners remain weighed down with negative perceptions.

## NET HEALTH PERCEPTIONS

NET Scores = Good for You (top 2 boxes) – Bad for You (bottom 2 boxes)

**Stevia Leaf Extract**

17%

**Stevia**

17%

**Sucralose**

-33%

**Aspartame**

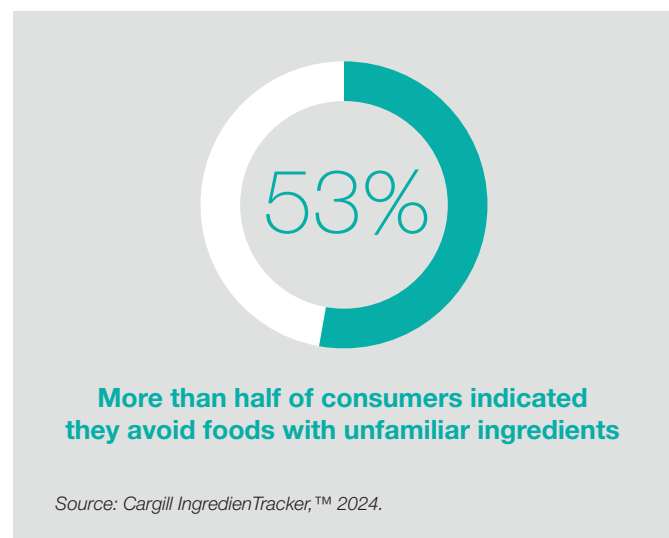
-45%

Source: Cargill IngredienTracker,™ 2024.



As consideration for sweeteners has risen, watchfulness related to other categories – especially fats and oils – has waned. Still, consumers perceive some, including sunflower oil and canola oil, as “good” fats, while fully hydrogenated oils, tallow and lard are viewed more negatively.

Cargill's IngredienTracker™ survey offers additional insights into common considerations guiding label-conscious consumers. As a general rule, the more familiar a consumer is with an ingredient, the more comfortable they are with its inclusion in food and beverage products. Kitchen pantry ingredients like honey and chocolate typically score well, but consumer unease with unfamiliar ingredients has grown over the last four years, rising 3 percentage points. In the most recent survey, more than half of consumers (53%) reported avoiding unfamiliar ingredients.



Consumers also use nomenclature cues to influence their perceptions of ingredients. Those tagged with names that hint at being grown or more “natural” typically score better. Stevia leaf extract scores higher than steviol glycosides; sea salt is preferred to salt. Conversely, the Cargill survey found that consumers were more likely to consider an ingredient less healthy if its name had certain characteristics. Names with numbers like polysorbate 80, the letter “x” such as polydextrose, or words that suggested “more processed,” like hydrolyzed, were often viewed less favorably. Similarly, ingredients with acronyms or chemical-sounding names yielded negative purchase impact ratings, too.

## Implications for snacks & bakery

These underlying consumer perceptions may have implications for snack and bakery manufacturers, especially those aiming for the most label-conscious consumer segment. Fortunately, Cargill's broad ingredient portfolio includes options that may align more closely with these consumers' expectations.

### Emulsifiers

For brands striving for simple, straightforward labels, options like diacetyl tartaric acid ester of mono- and diglycerides (DATEM) and sodium stearoyl lactylate (SSL) may not make the cut. Other emulsifiers are more label-friendly, including Cargill's line of sunflower, canola and soy lecithins, though additional solutions may be needed to provide the same functionality.

### Hydrocolloids

Pectin, while not widely used in bakery, enjoys favorable consumer reviews thanks to its status as a staple in Grandma's pantry. It also has a compelling origin story, as pectin is made from the leftovers of juice production – apple pomace and citrus peels. Couple these renewable, upcycled roots with consumers' positive perceptions, and it easily checks the label-friendly box for bakers and snack makers.

### Maltodextrin

With few clues to its origin (and an “x” in its name), some consumers may be skeptical of maltodextrin. Cargill's SimPure® soluble rice flour gives formulators a label-friendly option, with an ingredient that offers similar functionality to 10DE maltodextrin, as well as an easy-to-understand name. The ingredient also has applications in some reduced-sugar products, such as replicating volume, texture and mouthfeel... adding to the toolkit for these challenging formulations.

### Artificial sweeteners

Consumers have long been wary of artificial sweeteners, which explains why this class of ingredients consistently scores near the bottom of our annual ingredient survey. In contrast, stevia leaf extract is one of the few sweeteners with positive perceptions. Cargill's stevia portfolio includes Truvia® and ViaTech® stevia leaf extracts, as well as EverSweet® stevia sweetener, backed by experts who can help developers build the best sweetening solution for their unique sugar-reduction needs.

### **Fats & oils**

Fully hydrogenated oils create confusion, and interesterified oils are unfamiliar to consumers. Both are processing techniques that yield highly functional fat and oil alternatives to the partially hydrogenated oils that are no longer GRAS in the U.S. However, Cargill's portfolio also includes options that label more simply, such as coconut, sunflower or canola oils, and our experts can work with customers to address their specific functionality and labeling needs.

### **Salt**

Sea salt continues to enjoy a halo with consumers, consistently perceived more positively compared to other salts. It's a prime example of how an ingredient's origin story matters to consumers and can have a positive impact on purchase decisions. Cargill's Pink Himalayan Salt options offer similar positive connotations.

### **Starches**

Modified starches bring unique functionality to recipes, but some brands prefer to rely on functional native starches, which label simply by their botanical source (e.g., tapioca starch). Cargill launched its SimPure® line specifically to address this need, developing a range of starches that combine functionality with a high level of process tolerance.

### **A proven partner**

Consumer scrutiny of package labels shows no signs of abating – if anything, their expectations will only grow. That's why Cargill has rapidly expanded its label-friendly toolbox and continues to monitor consumers' attitudes towards hundreds of ingredients. We also recognize, however, that ingredient replacement is rarely a straightforward exercise. Successful reformulation may require adjustments to inclusion rates, additional ingredients, changes to processing and more.

Cargill's ingredient and application experts can help brands navigate these challenges, with the ultimate goal of delivering finished products that are not only label-friendly, but taste great, too. It's a winning formula for brands and consumers alike – and illustrates how Cargill helps customers translate “clean” into green.

Navigate label-friendly perceptions – and formulation realities – with Cargill.

\* There is no single definition of “non-GMO” in the USA. Contact Cargill for source and processing information.