

CONSUMER INSIGHTS



Going Against The Grain

Once difficult to identify, the universe of gluten-free products is now huge — and expanding. BuzzBack, LLC's Christina Ton examines the forces behind the surging popularity of these items.

GLUTEN-FREE CLAIMS are popping up on more and more product packs, even on foods that are naturally so. Beyond labels and packaging, "gluten-free" continues to surface in the news. In fact, during a recent webinar produced by the Institute of Food Technologists, David Sheluga, PhD, of ConAgra Foods, Inc., shared findings showing U.S. retail sales of these products increased by nearly 50 percent in 2013, with a significant portion of the growth coming in snacks.

What started out as a need-based diet for individuals diagnosed with celiac disease and gluten intolerance has since catapulted into a category boom for both food makers and consumers, but just how is the gluten-free phenomenon sustaining itself?

WHO BUYS GLUTEN-FREE?

BuzzBack, LLC conducted a study in February 2014 to learn more about consumer perceptions surrounding the gluten-free phenomenon. The research included 244 U.S. residents responsible for household grocery shopping, with an additional segment of gluten-free purchasers. The study was also conducted in the U.K.

In addition to trying to live a healthier lifestyle, the majority of respondents say they buy gluten-free products to ease stomach-related issues. Other reasons include a desire to reduce or eliminate unhealthy carbohydrates, improve energy levels and aid digestion.

When it comes to shopping habits, four in 10 consumers say they buy gluten-free items most of the time; and more than half say they make these purchases at standard grocery

stores. However, 40 percent of consumers also agree gluten-free items are hard to find. In addition, eight in 10 confirm it is difficult to stick to eating gluten-free when dining out, and only one-third indicate they know of restaurants, bakeries or coffee shops with gluten-free items on their menu.

As expected, bread, pasta and cereal emerge as the top gluten-free products purchased. However, gluten-free purchases are also growing beyond the usual clan of carbohydrates. At least three in 10 consumers surveyed say they have bought gluten-free snack-related foods — cookies, crackers, chips, candy — with similar numbers reporting purchasing these items in the past month.

It is not so surprising then, that according to ConAgra, the top-selling gluten-free products for 2013 coincide with consumers' taste buds: Gluten-free crackers raked in \$156 million in sales, followed by salty snacks and chips, with \$125 million.

The BuzzBack study also revealed interesting differences among gender and age groups. For instance: More women than men purchase gluten-free to treat other health-related conditions and because they experience stomach aches and bloating. Compared with consumers aged 18 through 39, those between ages 40 and 64 buy gluten-free items to reduce their risk of heart disease and lower their intake of unhealthy carbohydrates or eliminate them altogether.

Conversely, among those who don't buy these products, price, taste, availability and nonessential concerns (i.e., not having celiac