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IACM Global Color Conference

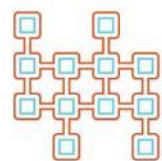
# A Colorful World: New Product Innovation Trends in Food Colors



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VP Strategic Insights – North America November 17, 2022

# World leader in food ideas and answers



## WORLD'S BIGGEST FOOD DATABASE

GLOBAL  
CONSUMER  
INSIGHTS



25 YEARS OF  
TRENDS  
INSIGHTS

LARGEST COLLECTION  
OF NEW PRODUCTS  
ANNUALLY



TRULY GLOBAL  
CONSISTENT  
COVERAGE

Our networks  
are paid  
professionals

In-Country  
Researchers

MARKET  
SIZING

# Trends and opportunities in food colors

## Key Trends

Instagrammability →  
personal appeal

## Naturalness

## Cleaner labels

## Plant based alternatives

## Opportunities for NPD – watch for more of these coming

*Bolder and more  
vibrant colors adds  
value on-shelf and the  
plate*

*The value of natural  
colorings for their  
environmental or  
ethical benefits*

*Areas such as organic  
foods and plant-based  
products are important  
growth markets*

*Top performers include  
spice-derived  
ingredients and  
coloring foods (e.g.  
spirulina, black carrot  
and red beet)*



**From Personal  
Appeal to  
Instagrammability**

# The role of color in food

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An attractive  
appearance

On-shelf and on the plate



Complementing  
taste

Matching color to flavor



Instagrammable  
products

Sharing novel experiences



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**Source:** Innova Market Insights

# New generations of digital consumers are living their food lives online

Millennials and Generation Zs are becoming more wedded to online interactions around food

29%

of consumers in 2019 said that they took pictures of their food and drink and **shared them online at least once a week**

33%

of consumers in 2021 said that they actively **shared their opinions regarding food** on social media

This rose to **44%** among Millennials and **37%** among Generation Z...



This rose to **43%** among Millennials and **40%** among Generation Zs...

...but fell to just **8%** among Boomers



...but fell to only **19%** among Boomers

**Sources:** Innova Trends Surveys 2019 and 2021

# Retail brands also target foodservice for more opportunities

- The most Instagrammable foods tend to be found in the foodservice market, with restaurants having more scope for experimentation than FMCG brands.
- Although taste is key, more restaurants are recognizing the benefits of colorful products that appeal to the Instagram generation. Recognizing this, many retail brands are teaming up with foodservice operators for more colorful and Instagrammable products.



## Taco Bell Brisk Dragon Paradise Sparkling Tea

Taco Bell in the US has teamed up with leading iced tea brand, Brisk, to offer Brisk Dragon, the brand's first ever sparkling tea, which is flavored with tropical dragon fruit, raspberry and blackberry flavors. It has a striking, on-trend purple color.



## Sonic Sour Patch Kids Slush Float

Sonic Drive-In has teamed up with Mondelez International to launch a colorful watermelon-flavored slush float drink with an ice cream topping and chewy balls of Sour Patch Kid candies both on top and floating in the drink.

## Sweet Frog Cherry Icee and Blue Raspberry Icee Swirl

A frozen yogurt that combines the new Cherry Icee and Blue Raspberry Icee sorbets inspired by the popular retail soft drinks.



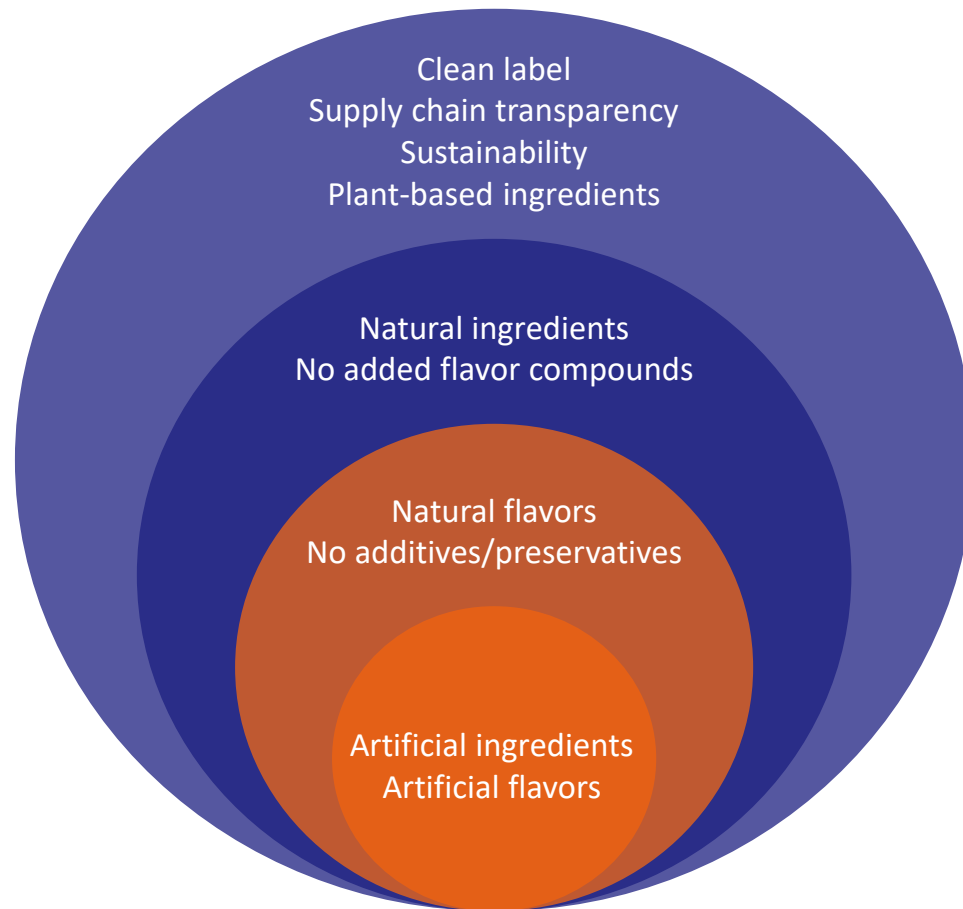
**Sources:** Innova Market Insights, [Taco Bell](#), [Sonic Drive-In](#), [Sweet Frog](#)



**Demand for  
Natural Coloring**

# Innova's Top 10 Trends spotlight the evolution of ingredients choices

Innova's Top 10 Trends: the evolution of ingredient and flavor choices to include clean label, transparency and sustainability features



## The Progression of Color Use

### Coloring foods

- The push for “clean labels” is prompting replacement of color compounds with natural ingredients that can make their own contribution to coloring.



### Natural colors

- Boosted by growing demands for more natural and traceable foods and beverages.



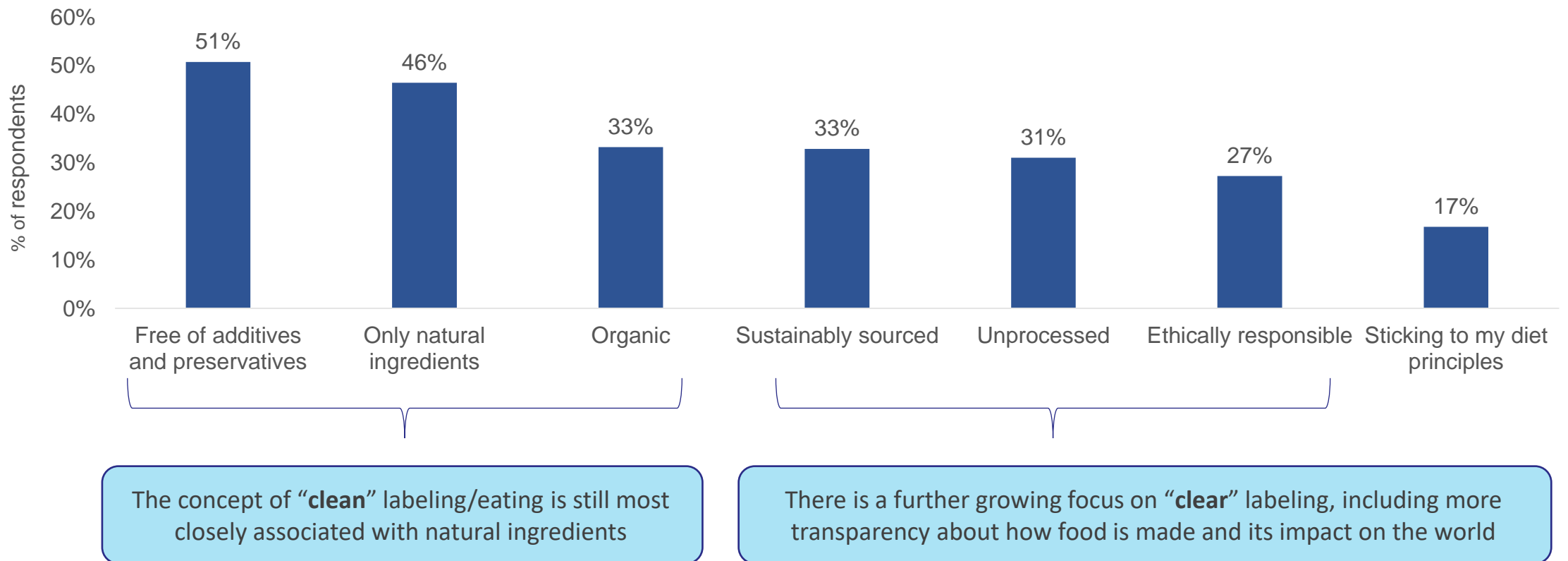
### Artificial colors

- Delivered more exciting and vibrant colors to the food and drink market.

Source: Innova Market Insights

# “Clean” eating starts with naturalness

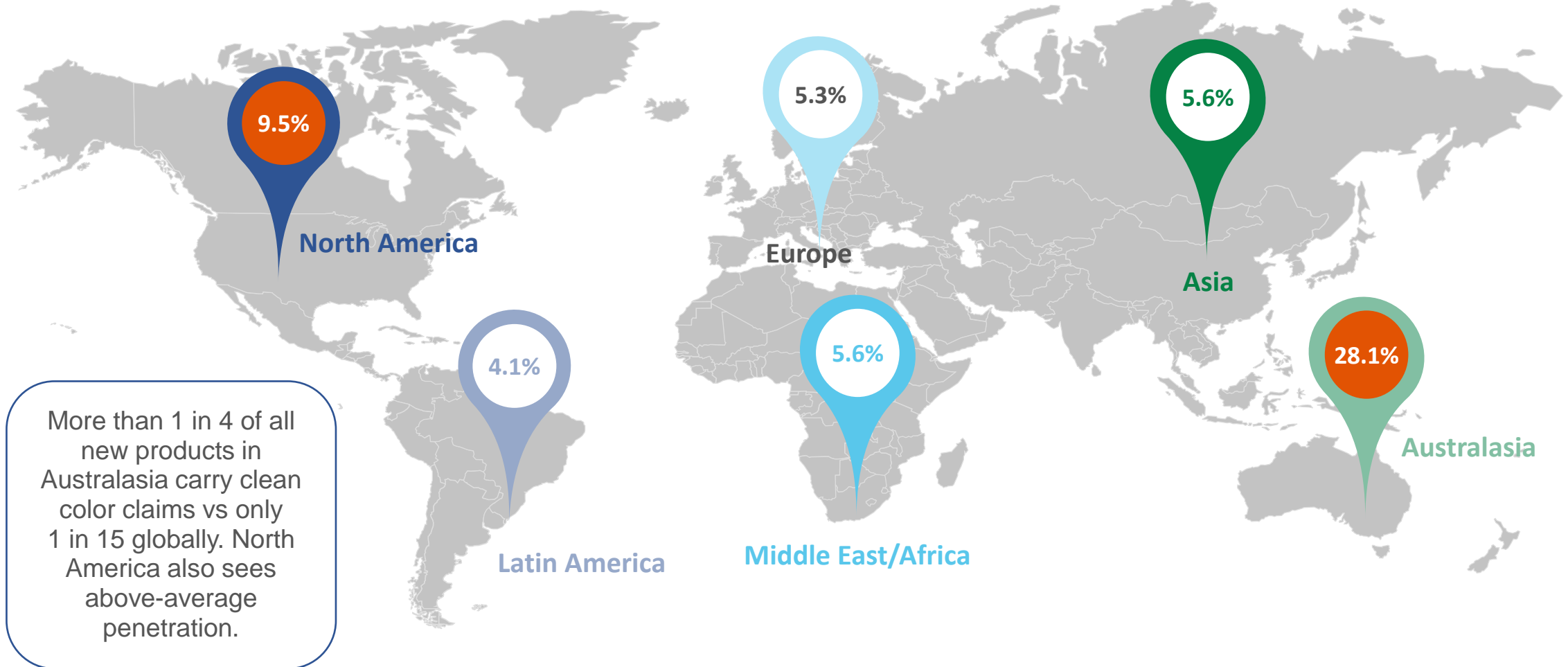
Figure | What does the term “clean eating” mean to you? (Average: 10 countries) (2020)



Source: Innova Health & Nutrition Survey 2020

# Australasia is way ahead of other regions in use of clean color claims

Figure | Clean color claims\* as a % of new food and beverage launches tracked by region (2021-2022, 12-month period ending Q1)



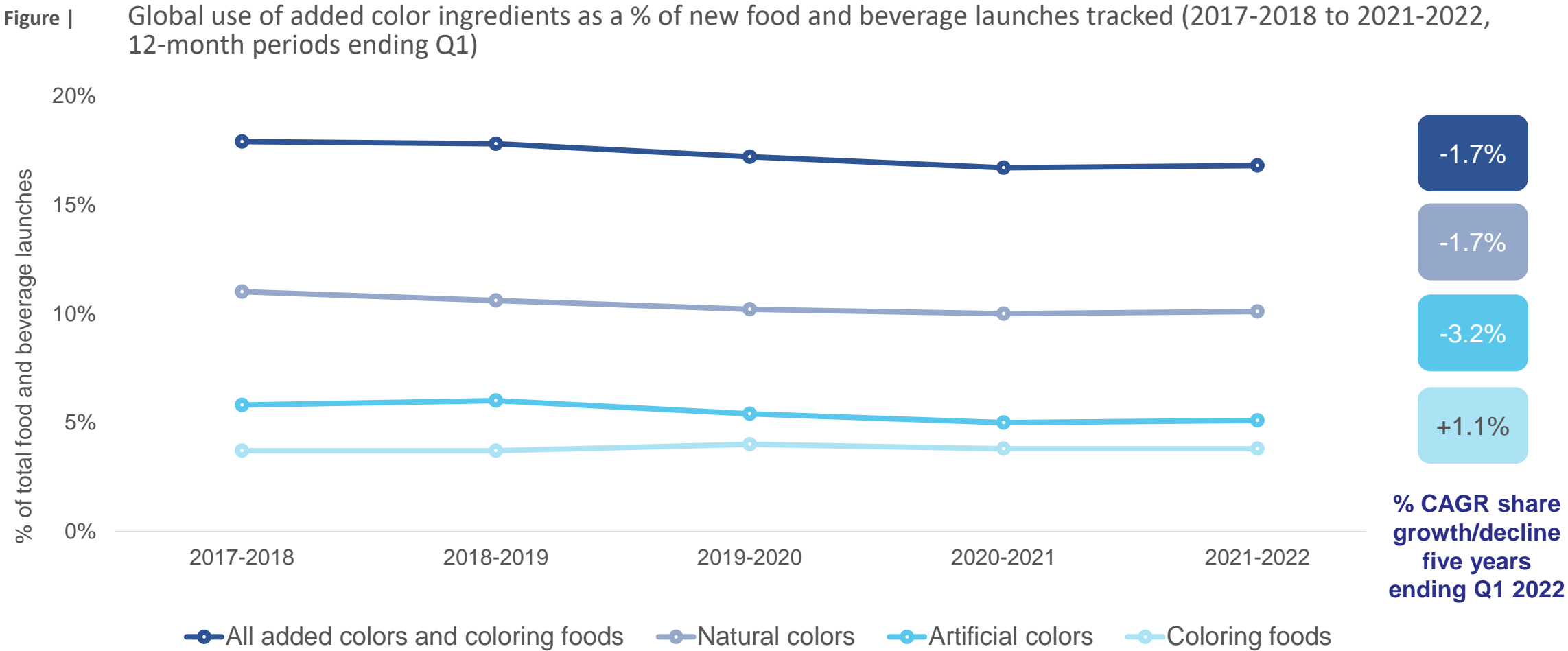
**Source:** Innova Market Insights

\*Based on free text searches of product claims and features for no artificial colors, no added colors and natural colors



## Use of Color Ingredients

# Coloring foods is the only area in growth for new product launches



**Source:** Innova Market Insights  
**Note:** Categories are not mutually exclusive; products may contain more than one type of coloring agent

# Fast-growing categories across color choices

Selected fast-growing categories in average annual growth of new food and beverage products tracked with colors  
(% CAGR 2017-2018 to 2021-2022, 12-month periods ending Q1)

**Artificial colors:** wide use in energy drinks



**+24.8%**

Energy drink launches with artificial colors

## Monster Energy Ultra Peachy Keen

United States, May 2022

A summer flavor variant, colored with tartrazine (yellow 5) and sunset yellow (yellow 6) colors.

**Natural colors:** boosted by plant-based



**+30.1%**

Burger, ground meat & meatball substitutes with natural colors

**+46.2%**

Non-dairy cheeses with natural colors

## Good Catch Plant Based Salmon Burgers

United States, Jan 2022

Frozen plant-based alternative to salmon burgers with annatto extract as an added color.

**Coloring foods:** strong focus on kid's foods



Coloring foods overlap with flavorings as many are used for taste rather than color.

**+15.7%**

New cold cereal launches with coloring foods

## Kellogg's Special Edition Strawberry Mini Wheats

Canada, Apr 2022

A special edition wheat cereal with strawberry flavor. Contains red beet juice, red radish juice and paprika extract as colors.

**Source:** Innova Market Insights

# Color is key in children's foods and there is still demand for colorings here

Artificial colors still popular for vibrancy

Other products mix natural colors and coloring foods for optimum results



**Huer Strawberry Frosty Gummies**

Philippines, Apr 2022

Gummy sweets with a strawberry frosty flavor. **The vibrant cerise color comes from use of artificial Allura Red.**



**Nestle Smarties White Chocolate**

United Kingdom, May 2022

A white chocolate version of Smarties chocolate beans in crispy sugar shells. **Carries a no artificial colors claim and uses beetroot red, beta-carotene, curcumin, spirulina concentrate, safflower concentrate, and radish concentrate.**



**Katjes Plant Based Rainbow Gummy Candy**

United States, Jun 2022

Gelatin free gummies in strawberry, orange, cherry and blueberry flavors. **Fruit and vegetable juices are included for color along with spirulina extract.**

**Source:** Innova Market Insights

A glass of golden turmeric latte with a frothy top, garnished with a dusting of spices. The glass is surrounded by fresh ginger root, sliced turmeric, cinnamon sticks, and a small wooden spoon filled with turmeric powder.

# Ingredient Trends and Developments

# Color Innovation: Sensient explores blues, purples and greens from butterfly pea

- In September 2021, the USDA approved Sensient's range of colors derived from the **butterfly pea flower**, revered as a holy flower in India where it is used in Ayurvedic medicine.
- Butterfly pea is already popular in the food industry in SE Asia, where it is used to make a tea known as **blue tea** thanks to its vibrant blue color.
- Natural blue colors are hard to come by and the color industry has been focused on innovation in natural blue color. **Spirulina** has built a strong position here, but better, less expensive alternatives are still desired.



The butterfly pea flower makes a vibrant blue tea

## Asian innovators start to experiment with butterfly pea

- Launches of food and beverage with **butterfly pea rose** 5x from 2017-2018 to 2021-2022, albeit from a very small base.
- The focus of development is still on the Asian tea market but there are signs of interest from other markets.



Sunkrisps Instant Rainbow Noodles With Cheese Flavor

Indonesia, Feb 2022



Double Happiness Breakfast Butterfly Pea Pancake Premix

Hong Kong (China), Oct 2021

Sources: Innova Market Insights, [Sensient Food Colors](#)

# Color Innovation: Oterra targets beverage replacement of Allura Red (Red 40)

- In early 2022, Oterra added to its Hansen Sweet Potato range of natural anthocyanin colorings. FruitMax Red 116 WS is a better replacement of bold Allura Red (or Red 40) colors in beverage applications.
- Bolder colors are increasingly popular in beverages, so delivering such colors naturally and effectively has never been so important.



Oterra uses sweet potato to deliver bold reds

## Bold reds are achieved both naturally and artificially

- Red 40 or Allura Red remains a popular choice in beverages but demand for natural alternatives is high.
- Suppliers are already turning to fruit- or vegetable-derived ingredients.



### Splash Fizz Raspberry And Blackberry Sparkling Beverage

United States, Apr 2022

With Red 40 coloring.

VS

### Fever Tree Sparkling Italian Blood Orange Drink

France, Jun 2022

With sweet potato, carrot, safflower and lemon coloring concentrates.



# Future directions for NPD: tapping into natural alternatives

## Safflower has clear potential as a coloring concentrate

- **Safflower concentrates** are already used for their coloring properties in food and beverages, although they are rarely referenced as colors. The emphasis is on Europe and Asia, with safflower still not approved as a coloring agent in the US.



### Ah Cookie Bites Confetti Cookies

Belgium, Jun 2022

Safflower is listed as a coloring concentrate.



### Meiji Mouth Mika Tagumi Innocent Type Lemon Gummies

Japan, May 2022

Listed as safflower color.

## EU ban on titanium dioxide will require changes

- **Titanium dioxide** is still appearing in EU food and beverage NPD in the first half of 2022 but is currently in a “phase out” period and will be banned outright in August. Many products will need to seek alternatives, with a couple of examples here.



### Ah Snowman Donuts

Netherlands, Dec 2021

With titanium dioxide, plus beta-carotene and paprika oleoresin colors.



### K Classic Spear Mint Sugar Free Chewing Gum

Germany, Nov 2021

With titanium dioxide color.



**What's next?**  
Future directions for NPD

# Purple and violet are on-trend

## Very Peri is the Pantone color of the year

- In 2022, Pantone announced **Very Peri** as its color of the year. The new color is described as a “dynamic periwinkle blue hue with a vivifying violet red undertone” and blends “the faithfulness and constancy of blue with the energy and excitement of red”



## Food industry to explore more purple hues

- Increased interest in purple as a natural color has **purple yam (ube)** and **purple sweet potato** offering natural solutions for this hue. At the same time, violet flowers have already been used in specialty food and drinks for many years so these could also feature more prominently.



### Gin Lane 1751 Violet Gin

United States,  
May 2022

Gin infused  
with all-natural  
violet leaf oils.



### Sorbetero Purple Yam Ice Cream

Canada, Jan 2022

Ice cream with purple yam purée  
for a natural purple color.

**Sources:** Innova Market Insights, [Pantone](#)

# Health strategies: Plant-based diets can now take precedence over additives

Health is the #1 driver, but health of the environment gains prominence

Figure | Why would you consider 100% plant-based alternatives?  
(Average: 11 countries) (2021)



Similarly positive views of health and sustainability benefits

Figure | In my opinion, a plant-based diet is... (Average: 11 countries) (2021)



Views around health now include a “healthy planet”

28%  
consumers globally

“I include **environmental wellbeing** when thinking about holistic health”

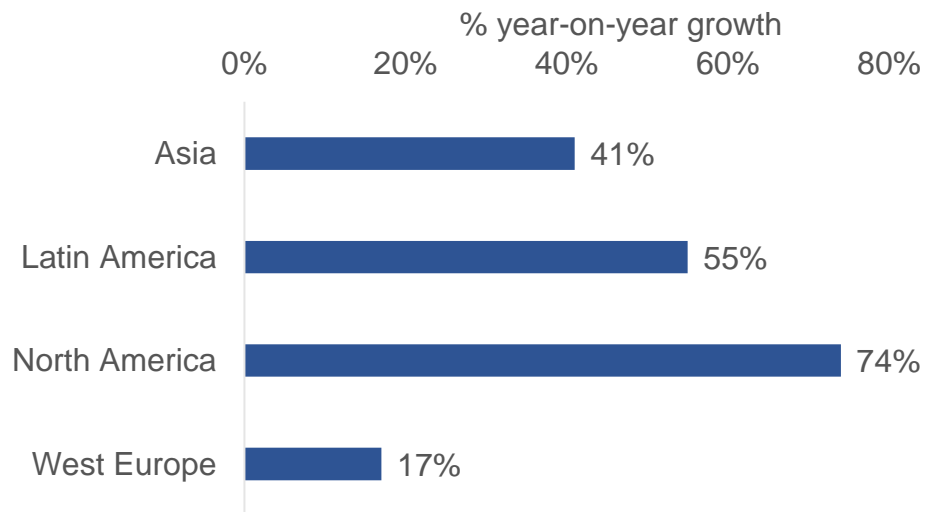
Sources: Innova Trends Survey 2021, Innova Meat, Dairy & Alternative Protein Survey 2021

# Plant-based movement to boost demand for natural browns, reds and yellows

The provision of authentic colors is important to establish plant-based alternatives to meat and cheese

Advances in natural browns, reds and yellows will be increasingly important as suppliers seek to deliver products that closely mimic animal-derived variants.

Figure | Regional growth in launches of meat substitutes (% year-on-year growth) (2020-2021 to 2021-2022)



## Jumbo Plant Based Alternative To Grated Gouda

Netherlands, May 2022

An alternative to grated gouda, with **carotenes, olive extract and paprika extract as added colors.**

**West Europe and North America** still represent 71% of all launches of non-dairy cheese, but other regions are showing strong growth.

Source: Innova Market Insights

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# THANK YOU!

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## For insight-led future growth opportunities

The Innova Database is an online, cutting-edge food and beverage product database – created by a dedicated team of industry-leading food and beverage experts that collect the latest data from more than 90 countries.

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