

The background of the slide is a vibrant blue. In the upper center, a wooden robotic hand is shown holding a single, bright red cherry. Below the hand, a chocolate muffin topped with chocolate chips is visible. The entire scene is framed by a white dashed line that forms a large, irregular shape on the left side of the slide.

Smarter Sweetening – Consumer Needs & Consumption Drivers of Tomorrow

Südzucker Consumer Study
Processed Foods & Drinks 2021

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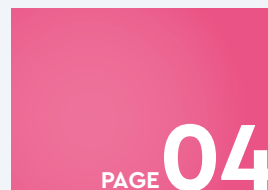
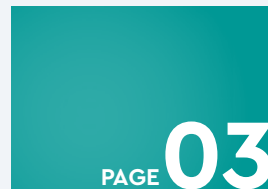
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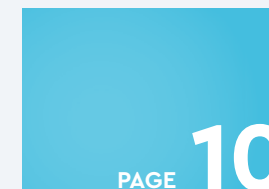
Discover the main drivers for consumption



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1. Why a consumer study about sweetening?

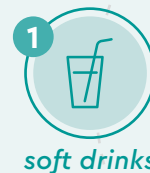
What is driving the consumption behaviour of consumers with regards to processed foods and drinks today and in the future? Trends and drivers influencing consumer choices are constantly changing and evolving. To best serve consumers with the most successful product offering, it is essential to gain solid insights and understand their attitudes and needs.



*This new, representative Südzucker consumer study **aims to provide insights into the consumption behaviour of processed foods and drinks containing sugar.***

Five key consumer goods categories

that contain sugar as a key ingredient are focus of this study.



A total of 5,000 consumers – 1,000 each interviewed in  Germany,  France,  Belgium,  Poland and the  UK

answered our questions regarding the following key research fields:

sustainability



organic



health



product transparency





2. Our key findings: Discover the main drivers for consumption

Taste – it's the main reason why people decide to consume certain foods and drinks. However, besides this need for indulgence, consumers are also concerned about their health. After price, naturalness, sustainability, organic and lastly regionality were prioritized.

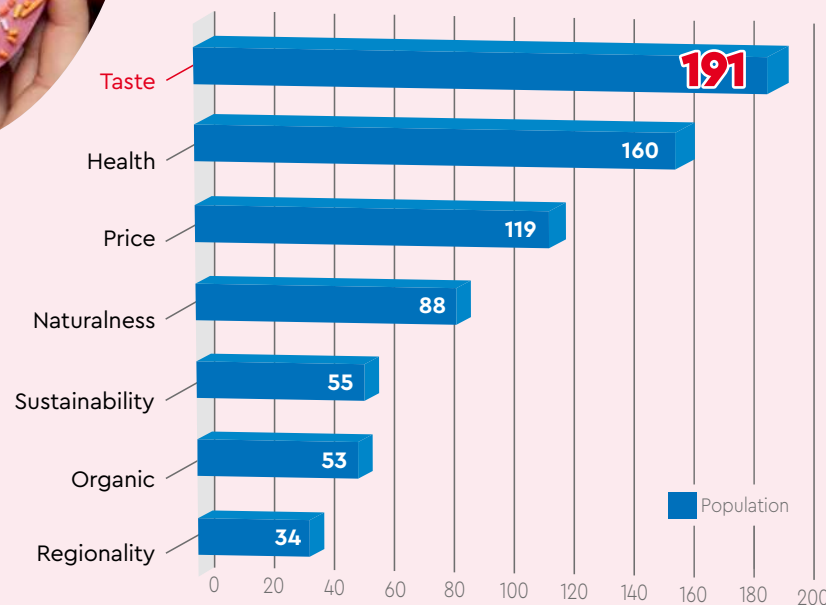


When comparing results between countries, health and naturalness were rated highest in Poland. In Germany sustainability and regionality were rated comparatively highest. Moreover younger consumers place higher importance on organic and sustainability compared to the rest of the population.

Health was indicated as second most important aspect for consumption choice.



Most important consumption drivers



This is a relative index ranking on a scale from 0 to 200. All items scoring higher than 100 can be considered more important than average. If an item scores double the index of another, it can be considered twice as important as the other.

Q: When consuming foods and beverages, how much impact do the following aspects have on you? Please indicate which of them are most and least important to you.

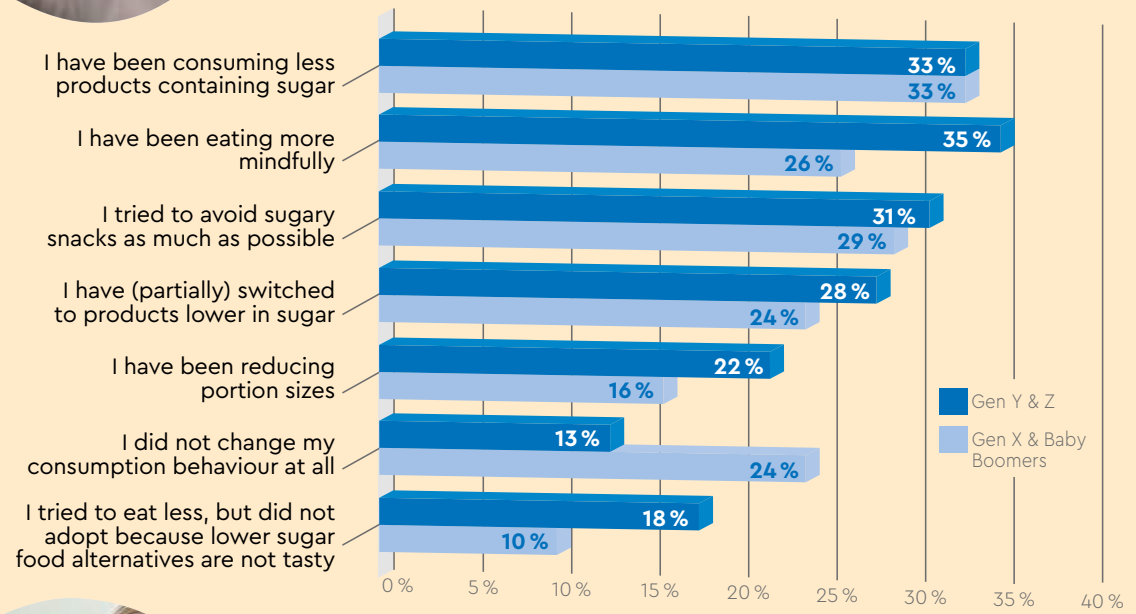
Online survey 03/21 | N=5020

Consumers change how they manage their everyday sugar consumption

Regarding taste and health, we also asked the participants of our study about their consumption changes of processed foods and drinks that contain sugar. Independent of age, about 1/3 of consumers state that they have started to consume fewer products containing sugar. The majority of consumers seem to not yet have changed their consumption behaviour in that respect. Yet, young consumers are less willing to compromise on taste for sugar reduction. These generational differences are slight but indicate a shift that has started and is going to continue. Looking at the overall low confirmation rates of the tested statements, this seems to be in line with the low adoption of sugar-reduced items, especially in indulgent food categories.



Consumption change of processed food/drinks



Q: How (if at all) did you change your consumption of processed foods and drinks containing sugar?
 Online survey 03/21 | N=5020



Especially younger consumers are changing their consumption towards eating more mindfully.



Sustainability! Everyone is talking about it.



In addition to omnipresent key issues like food waste and reducing (plastic) packaging materials' environmental impact, caring about flora and fauna is of the highest importance for consumers.

2/3 of consumers consider sustainable farming practices very important.

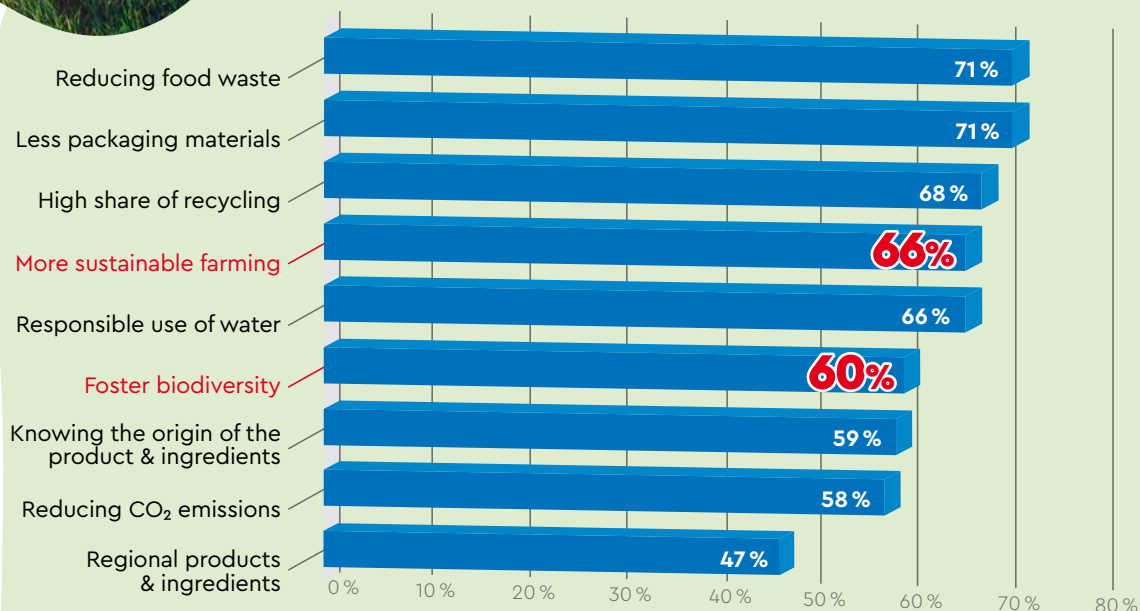
For 60% of consumers, fostering biodiversity is essential! Surprisingly, sustainable farming (66%) and biodiversity were rated even higher than CO₂ emissions. Related to this, more than 50% of consumers in our study indicate that it is important to consume products that contain sustainably sourced or produced ingredients. The high importance of ratings related to ecology, agricultural practices and ingredients confirms a strong consumer desire for food products with a better ecological sustainability footprint.



*44% of consumers would pay more for food and drink products that contain sustainably sourced sugar.**

*Q: How much do you agree with the following statements?

Importance of sustainability aspects



Q: When thinking of [product category] how important are the following factors for you?

Online survey 03/21 | N=5020

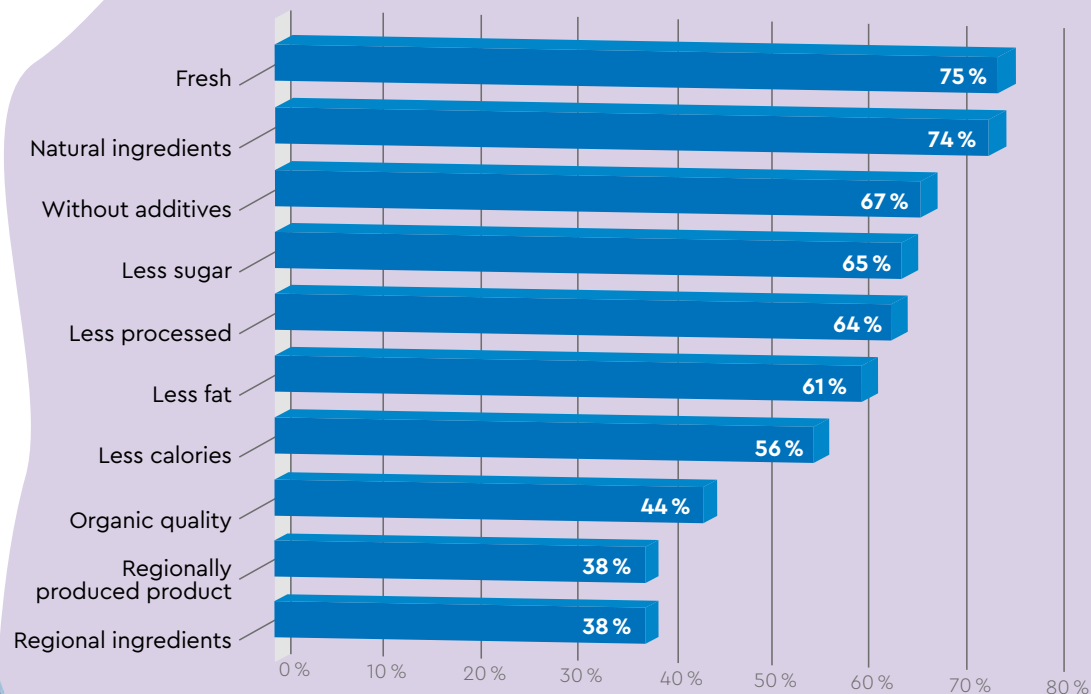


People care about their health

Across all five countries, most consumers rated health as the 2nd most important factor, closely behind taste. To respond to consumers' health concerns, it is crucial to understand key nutrition-related needs. Rather than reducing sugar, fat, and calories, **consumers favour fresh products (75%) and products with natural ingredients (74%)**. The key concern appears to be the desire to avoid any additives (67%) in foods and drinks. Consuming less sugar (65%) is followed closely by less fat (61%) and practical concern fewer calories (56%), with sugar currently as the key nutrient consumers worry about. The benefits of **regionally produced products (38%), regional ingredients (38%) and organic quality (44%)** appear to rank comparatively low in the graph. However, relative to actual market shares of regional and organic products in retail, this still indicates a massive opportunity and can be seen in the enormous growth of such categories.



Importance of product health drivers



Q: In case you try to consume healthier [product category], which aspects are most important to you to reach that goal?

Online survey 03/21 | N=5020



The consumer sugar dilemma. Clear priorities!

Eating healthier does not always merely mean reducing or omitting sugar. Since taste is the most critical consumption driver, consumers are not willing to reduce sugar at any price.

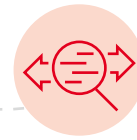


Almost 40% of consumers indicate that reduced sugar in their favorite products caused them to switch away.

This shows that it is crucial to strike a balance between nutritious, natural, and still tasty product formulations. Also, as other studies suggest, and further questions reveal, consumers do not want to trade sweetening ingredients for naturalness. Various sweetening ingredients were compared regarding healthiness and naturalness perceptions.

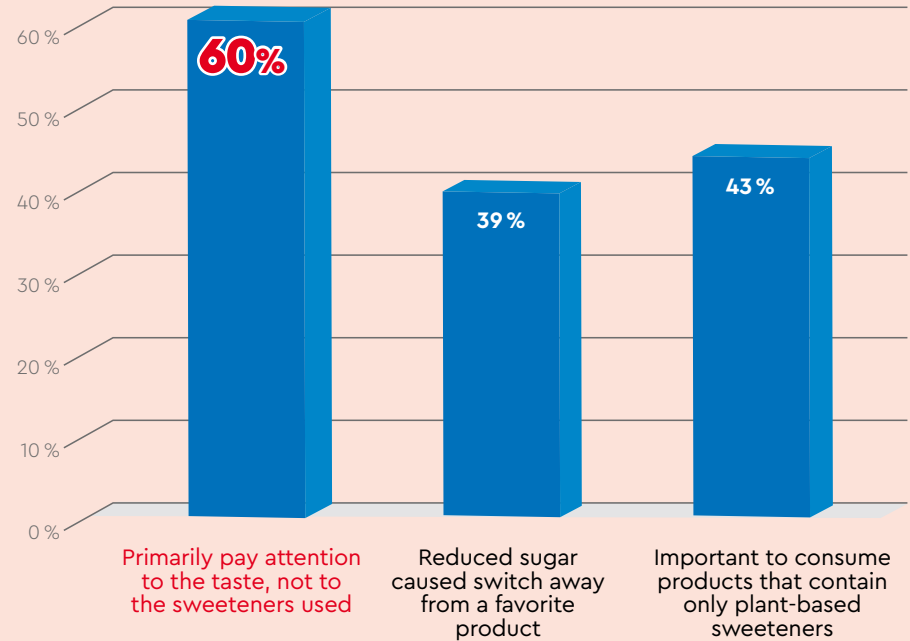


43% of consumers state it is important to consume products sweetened with plant-based ('natural') sweeteners.



Health, naturalness and indulgence

Agreement with the following statements in %



Q: Please read through the following statements and indicate how much you agree with each.

Online survey 03/21 | N=5020

Consumers want to know what is in their food

Many consumers are becoming more and more sceptical towards products on the shelves and want to know more details about their production, ingredients and quality.

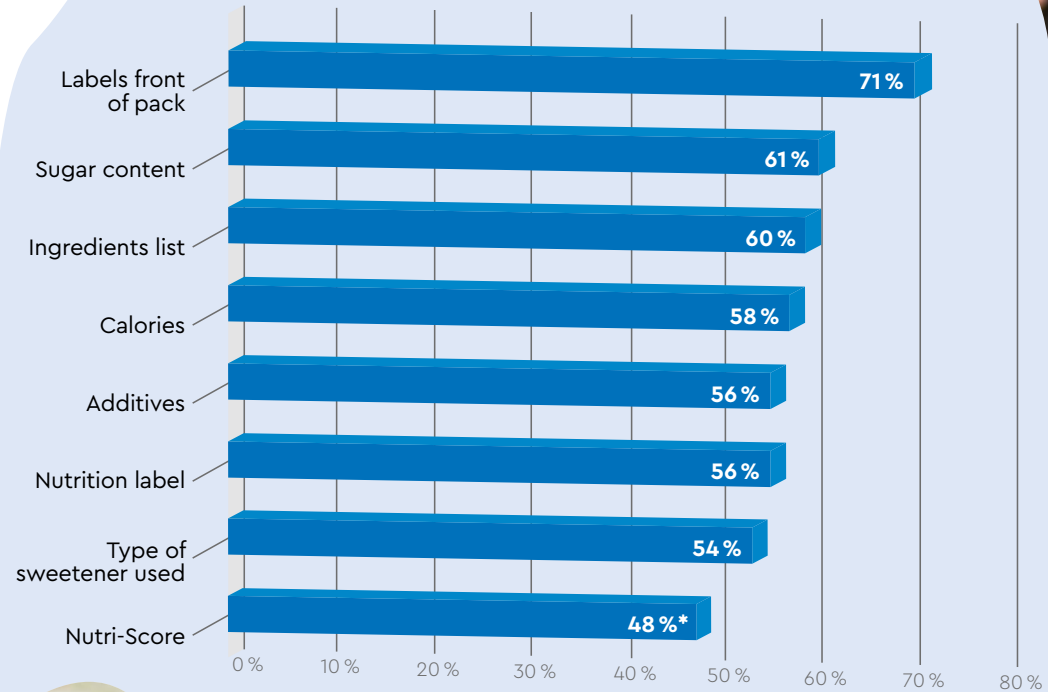
In our study we asked consumers to rate the importance of packaging label information and what they pay most attention to. Nutrition and ingredients-related information is widely considered and checked - more than every other consumer does it.

We were surprised to learn that the NutriScore is already widely on the consumers' radar: Across all 4 relevant countries, 48% rated the NutriScore as important packaging information (France: 55%, Germany, 44%, Belgium: 48%, Poland: 39%).

61% want to know what the product contains. 54% want to know more about the ingredients used.



Attention to packaging information



(percentages show consumers who indicate they pay attention to these aspects sometimes, very often or always)

Q: When you think of [product category], how often (if at all) do you pay attention to the following aspects when reading the information on the packaging

Online survey 03/21 | N=5020

*Nutriscore excl. UK'

3. Study design and the way forward

These insights are supposed to give you a broad overview of the topics that have been assessed in our "Smarter Sweetening" consumer study 2021. Most results are also available for different demographics, country-specific (for Germany, United Kingdom, France, Belgium, Poland) and on category-levels (for chocolates, baked goods & sweet biscuits, cereals/cereal bars, dairy products & alternatives, non-alcoholic beverages).

Are you interested in deeper insights and more specific study results? We offer to set-up discussions with our experts to mutually shape consumer-oriented growth opportunities. We are happy to bring specialists from our R+D, innovation, sustainability, sales and (consumer) marketing to the table to support you.



Country level

Germany, United Kingdom, France, Belgium, Poland



Sample

- N=1000 per country, nationally representative for gender & age
- Frequent category users; relevant role in household purchasing decisions



Categories



Chocolate (chocolate bars, pralines, chocolate snacks)



Dairy Products & Alternatives (not plain, but sweetened e.g. fruit yoghurts, milk mix drinks, etc.)



Baked Goods & Sweet Biscuits (RTE cakes, bakeries)



Soft Drinks (CSD, fruit refreshment drinks, iced teas, but not pure juices etc.)



Cereals (breakfast cereals, cereal bars)

Let's talk about future growth opportunities

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Sugar & Beyond

