

# The Future of Gluten-Free: Consumer Insight and Product Opportunities

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## Abstracts

### Introduction

Consumers who are completely intolerant to gluten consumption have celiac disease. They require a special diet where products are not made using wheat-based ingredients. The prevalence of celiac disease is growing, due in part to better diagnoses. As the number of potential consumers rises, products manufactured to fit in with their requirements are becoming more sophisticated

### Scope

A concise slidepack outlining the driving and inhibiting factors influencing the development of gluten-free markets globally

Data sizing the market for gluten-free products by country, complete with growth forecasts to 2014

Best-practice product examples of gluten-free foods and beverages across a number of different categories

Covers: France, Germany, Italy, Netherlands, Spain, Sweden, UK, US, Australia, Japan, S. Korea, China, India, Brazil and Russia, plus MENA-based insight

### Highlights

Many gluten-free markets have experienced double-digit growth in recent years due to

an increasing number of celiacs requiring these foods and beverages. Another factor is also that some consumers without celiac disease have adopted free-from alternatives as a healthier dietary option, despite the fact that they can digest gluten-based groceries

One of the main inhibitors of consumption is a widespread lack of knowledge. Many consumers do not know the full details of gluten intolerance. Indeed, many do not know the difference between an allergy and an intolerance. Furthermore, research shows that many consumers may have celiac disease but are either misdiagnosed or undiagnosed entirely

Gluten-free products are expanding, with an increasing number of snacks and alcoholic beverages designed to appeal to consumers on a sensory level. Innovative formulations are allowing manufacturers to make products using certain grains despite this process traditionally being thought of as unsuitable for this consumer group

## **Reasons to Purchase**

Consumer understanding: obtain a detailed understanding of consumer attitudes and behaviors towards gluten-free products by accessing unique data

Market understanding: identify the key markets and product innovation trends across Europe, the Americas and Asia Pacific

Ideation: find inspiration for innovative gluten-free product formulations and product positioning which capitalize on growing interest

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### INTRODUCTION

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Overall conclusions

Gluten-free, celiac disease and personalized nutrition

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Understanding consumers driving market growth

Consumer insight

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Product launch insight

Global product launch activity

Marketing insight

Wider communication and promotion of gluten-free/food intolerances

On-trend innovation

Pertinent examples indicative of future market direction

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