

Gluten-free Foods - US - September 2013

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“The gluten-free food category will continue to grow as an increasing number of manufacturers develop better-tasting and more nutritious gluten-free foods. Category appeal beyond those with celiac disease, coupled with a new FDA ruling for gluten-free product labeling, suggests the category will grow out of its marker as just another diet trend.”

– Amanda Topper, Food Analyst

This report looks at the following areas:

- Are concerns about gluten just a passing fad?
- How can gluten-free products continue to broaden their appeal?
- How will the FDA gluten-free ruling impact the category?

The \$10.5-billion gluten-free food and beverage industry has grown 44% from 2011-13 as the rate of celiac disease diagnoses and awareness of, and interest in, gluten-free foods increase. Some 24% of consumers currently eat, or have someone in their household who eats, gluten-free foods.

Perceptions of gluten-free foods have moved from being bland, boring substitutes for gluten-containing products to everyday items that appeal to those with and without a gluten allergy. Three quarters (75%) of consumers who do not have celiac disease or sensitivity to gluten eat these foods because they believe they are healthier, despite the lack of any scientific research confirming the validity of this theory. This health halo will continue to propel the category over the next few years, especially as an increasing number of companies join the gluten-free category, producing higher-quality foods and beverages that have a broad appeal. August 2013 FDA regulation on gluten-free product claims will now set the industry standard and make it easier for consumers to shop for their gluten-free lifestyle. Mintel predicts the gluten-free food and beverage market will grow 48% from 2013-16, to \$15.6 billion, at current prices.

Mintel here provides a comprehensive analysis of the following factors that have the greatest potential to impact the category's performance:

- How the market is broadening and how future growth will hinge on increased awareness of gluten intolerance, celiac disease diagnosis, and foodservice offerings
- How different gluten-free product segments have been performing in recent years, and how new product innovation (including foodservice) are impacting sales trends for the category as a whole and in each of its segments
- Challenges to the market and how manufacturers and retailers can position products to confront them
- Which brands are gaining, which are losing, and why within the market
- Current product positioning (including TV ads, online and digital promotional efforts) and what marketing strategies make the most sense given the various target audiences that manufacturers are trying to connect with to maximize sales opportunities
- The attitudes and behaviors of gluten-free consumers, including purchase decision criteria, product preferences and more

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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