



Special Diets: A Spotlight on Low-Carb, Keto and Paleo Diets

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INTRODUCTION

Scope

Key findings

THE ROLE OF SPECIAL DIETS IN WEIGHT MANAGEMENT

Overweight problems are increasing in the Americas and Middle East

Younger consumers are more concerned about their weight

One third of consumers follow special diets as a tool for weight management

Eating less carbs and processed food rank among the most common weight loss habits

High-protein, plant-based and gluten-free diets are driving demand for healthy foods

Diets that restrict carbs while focusing on protein, fats and less processing hold potential

CONSUMER MOTIVATIONS AND SEGMENTS TO TARGET

Weight management key reason for low-carb diets, while digestion drives gluten-free diet

Paleo diet claims ancient nutrition will improve the fitness of its followers

Consumer demand for special diets growing strongly in the Middle East and Africa region

Special diets chosen by health-conscious consumers while less processed attracts the masses

Young consumers drive low-carb diet while older ones limit bread and processed food intake

Educated consumers with high incomes are keener on trying special diets

High prices hinder the ability of special diets to reach the masses

Products that are mostly famous as a source of protein rarely have such claims

Medical recommendations remain the top source of diet information but are losing ground

Social media influencers are a driving force for special diets

Nutrition applications are gaining popularity in developing markets

WHERE TO PLAY AND HOW TO WIN?

Low-carb claims can bring potential to the staples category

The low-carb claim is gaining market share across the world except for Asia Pacific

Low-carb breakfast cereals and edible oils are the most promising growth areas

Dominated by dairy products, keto foods is expanding rapidly, from a low base

Keto claims remain niche but shows strong growth driven by Australasia and Western Europe

Cheese is the most popular and fastest growing keto category

Keto claims are driving innovation in the snacks category

The paleo claims market is concentrated in oils, fats and savoury snacks

The paleo claim is popular in North America and is growing in the Western Europe market

Edible oils contribute the most to the development of the paleo foods market

Certification schemes for food products to keep up premiumisation

Special diets, especially keto, are transforming into lifestyles

KEY TAKEAWAYS

The main challenges for low-carb, keto and paleo claims on the way to the mainstream

Areas of opportunity

Regional expansion and the fast-developing products

APPENDIX

Methodology

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