A photograph of a middle-aged man with short, graying hair, smiling warmly at the camera. He is wearing a light blue polo shirt with thin white horizontal stripes. His arms are crossed over his chest. The background is a solid, light blue color.

Trends for senior food products

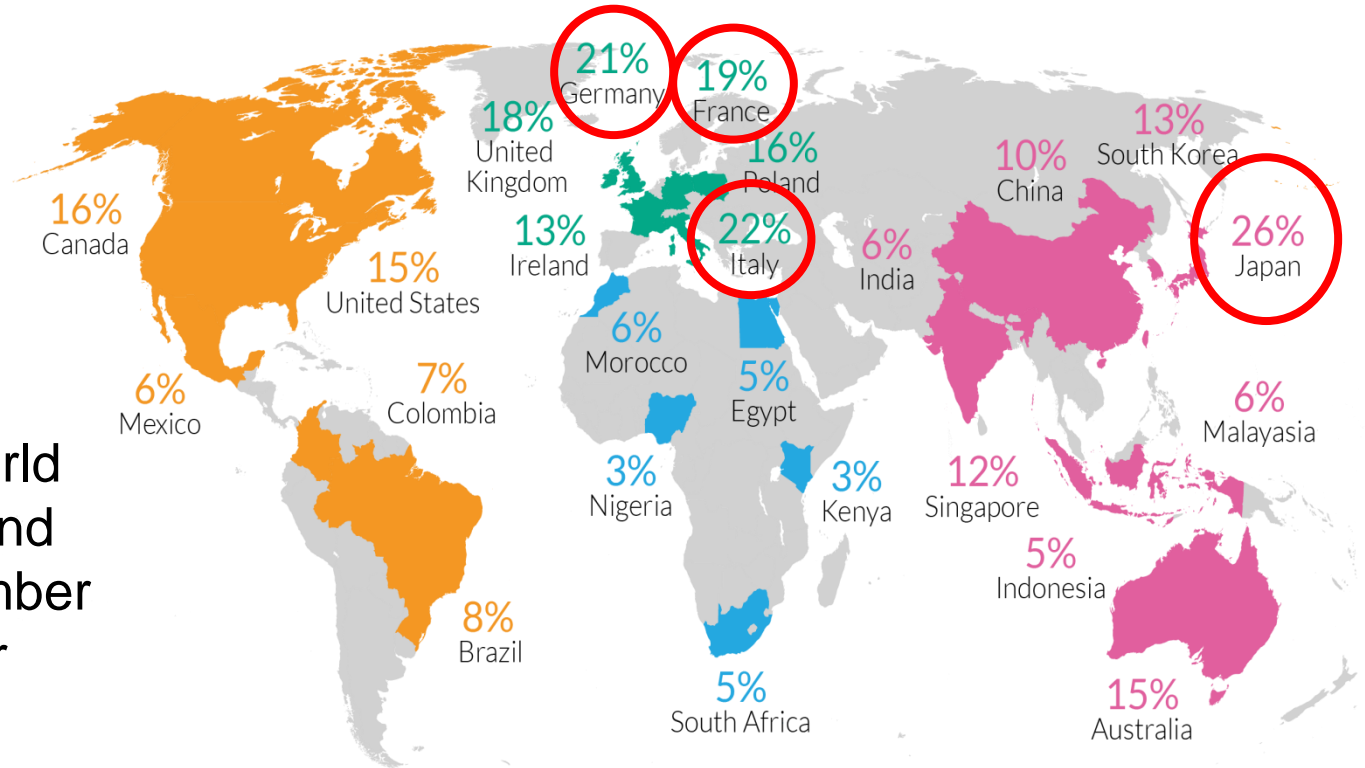


AGENDA

- The world's demographic milestone
- Dietary and nutritional considerations for seniors
- Marketing and Messaging to the silver generation

The world's aging population will bring new opportunities

Percentage of population aged 65 and above, by country, 2015



By **2020**,
The number of
people in the world
aged 60 years and
older will outnumber
children younger
than 5 years

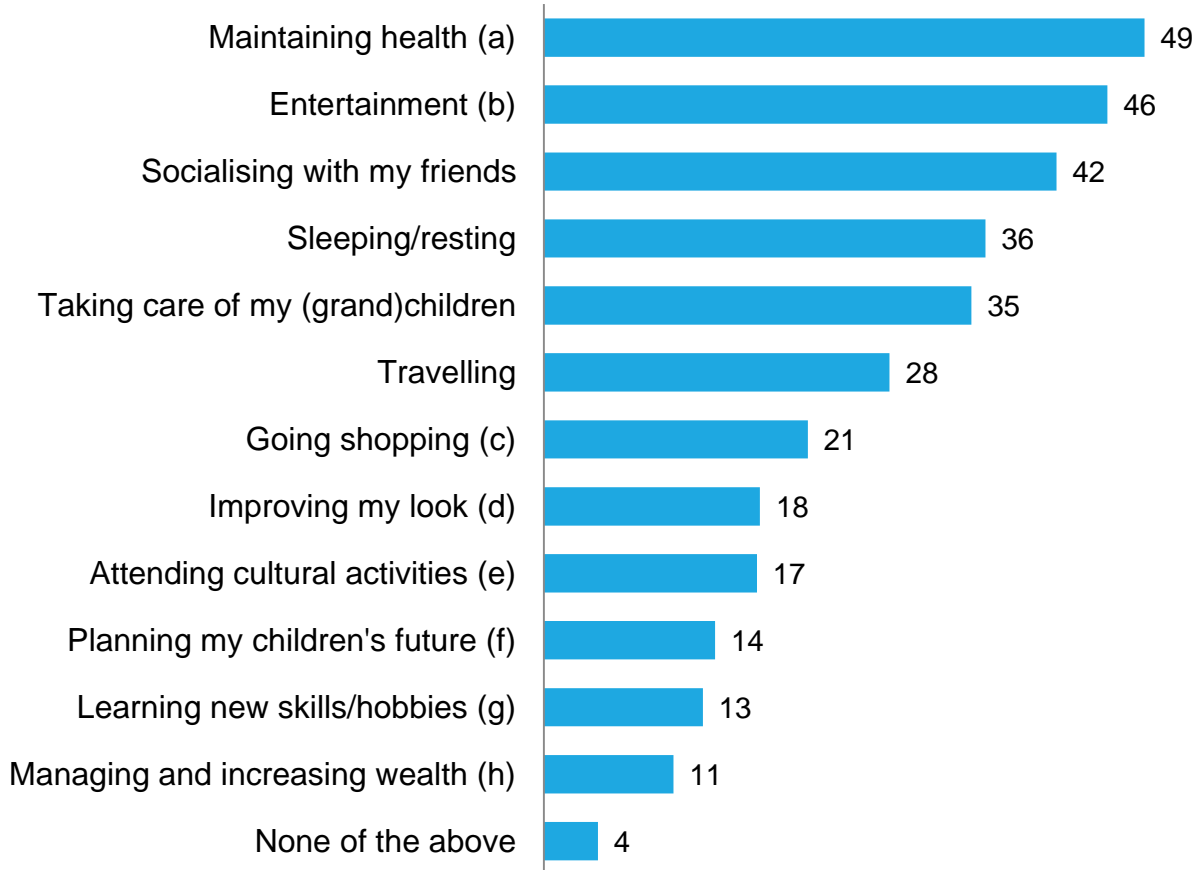
Asia Pacific at the forefront of aging



- Nearly two-thirds of the world's older people – **close to 1.3 billion** – will be living in **Asia-Pacific**.
- In **North-east and East Asia**, this proportion will be more than **one in three people**.
- **Women** currently constitute the majority – some **54%** – of the older demographic in Asia-Pacific.

In China, health is the top priority

China: Activities on which over-55s like to spend more time, December 2016



Note:

a: eg doing exercise, watching health TV program

b: eg watching TV, play cards/mahjong

c: including online and in store

d: eg doing hair, buying new garments

e: eg art exhibitions, concerts

f: eg arranging blind dates, purchasing or looking for apartments

g: eg languages, musical instruments, computer

h: eg doing a part-time job, buying stocks

In 'Greynnaissance' society, age is just a number!



Hidekichi Miyazaki, 107y
Shizuoka, Japan



Dr. Frank Shearer, 101y
Lorna Linda, US



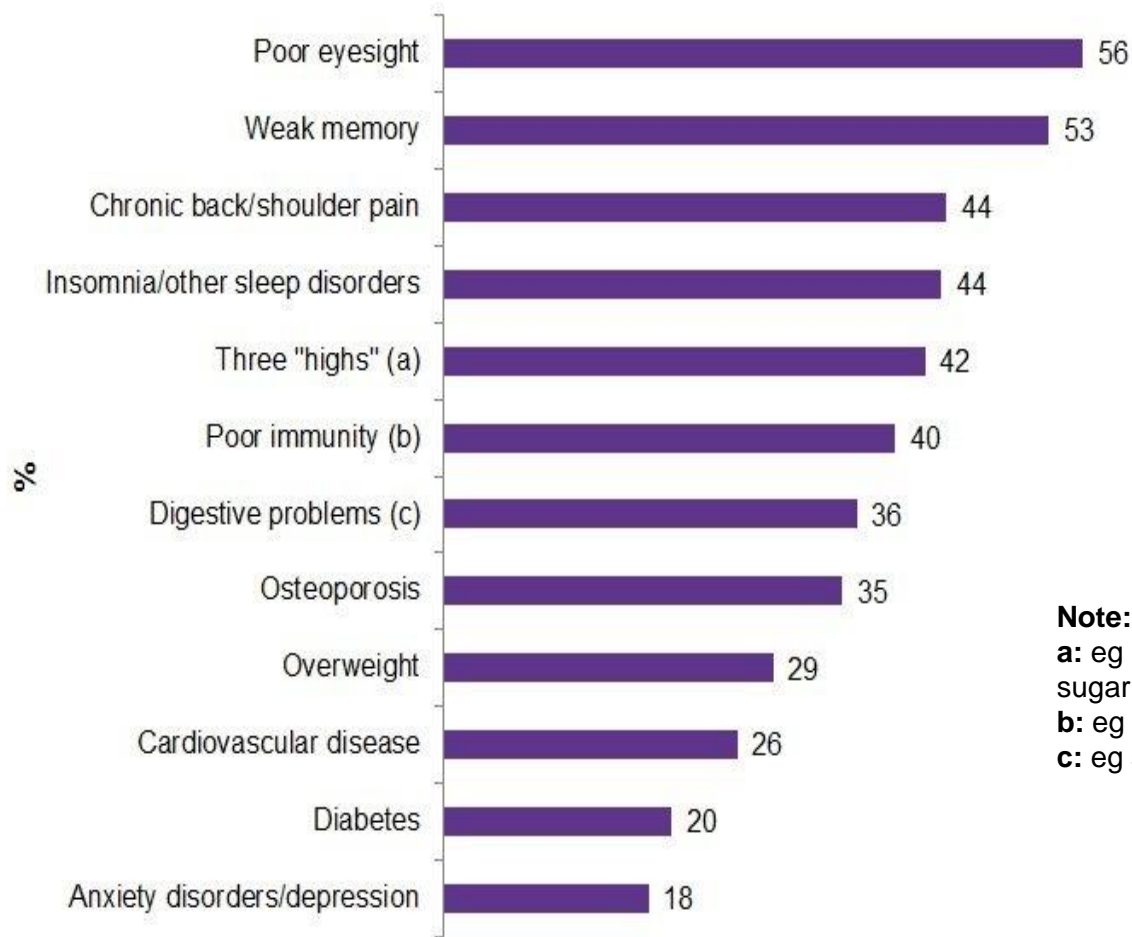
Helen "baddie" Winkle, 89y
Kentucky, US



Wang Deshun, 83y
Beijing, China

In China, physical pain is a key health indicator

China: Health issues, December 2016



Note:

a: eg high blood pressure, high blood sugar, high cholesterol

b: eg prone to cold

c: eg stomach ache, indigestion

Base: 800 seniors aged 55-74

Source: KuRunData/Mintel

A good eating habit is of great importance to seniors

China: Ways to achieve a healthy diet, December 2016



Note:

a: eg vegetables, rice of the year

b: eg maize, sorghum

c: eg cakes, chocolate

Asia Pacific dominates in senior product launches

Between May 2013 and April 2018, Asia Pacific is the leading region that launches senior food, drink, and healthcare products, globally.

Percentage of global food, drink and healthcare launches with a seniors claim, by region, March 2011 to February 2017

Region	Total Sample
	%
Asia Pacific	72%
Europe	17%
North America	6%
Latin America	4%
Middle East & Africa	0.3%

Prepared meals and white milk are the most common sub-categories for senior products

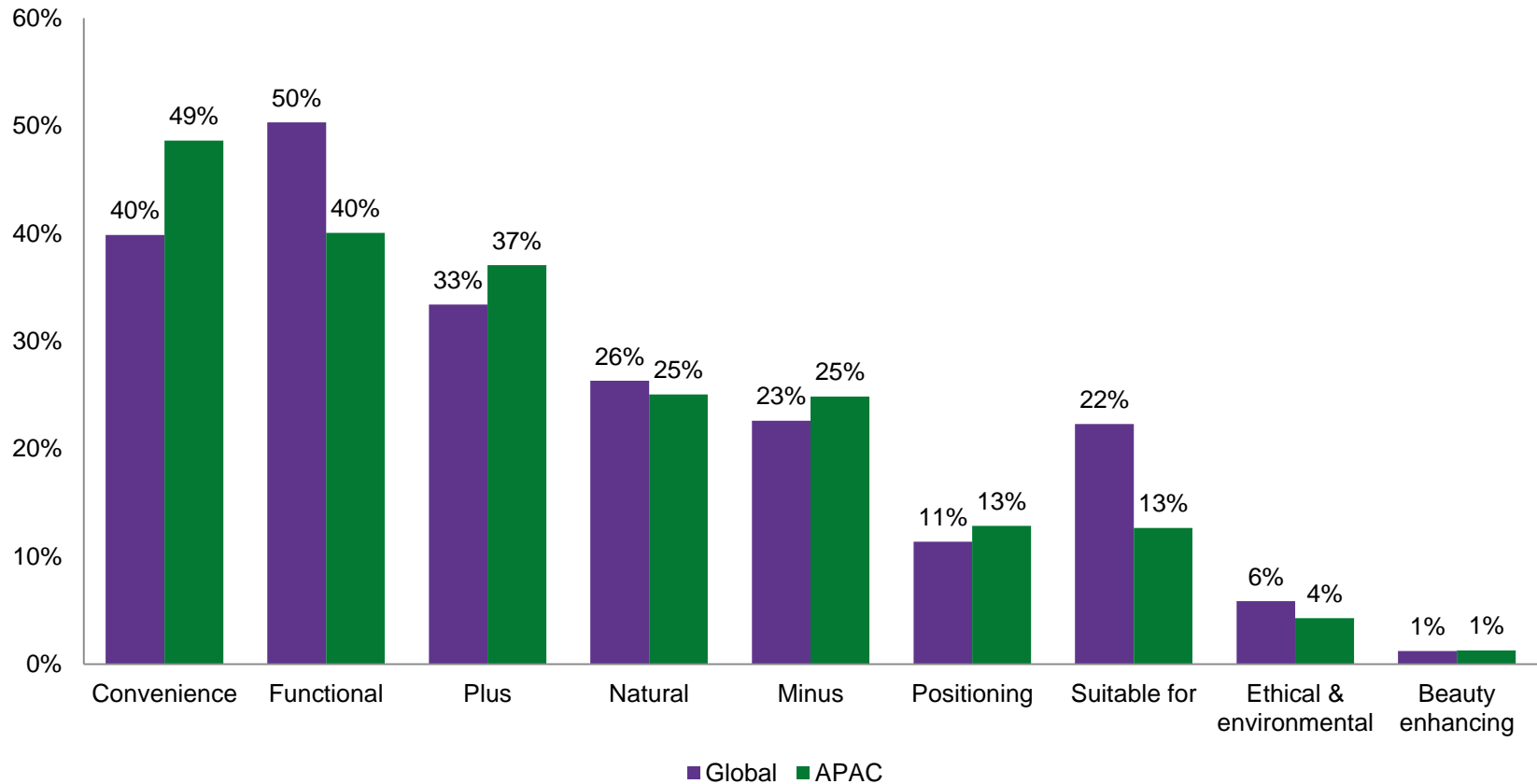
Majority of the senior products in APAC are in prepared meal, white milk, and hot cereal, and vitamins and dietary supplement sub-categories.

Share of sub-categories in APAC food, drink and healthcare launches with a seniors claim, by region, May 2013 to April 2018

Sub-category	Total Sample
	%
Prepared Meals	29
White Milk	18
Hot Cereals	8
Vitamins and Dietary Supplements	8
Meal Replacements & Other Drinks	7
Instant Rice	6
Malt & Other Hot Beverages	5
Wet Soup	3

Functional claim leads in senior products

Global VS APAC: Claim category penetration of senior food, drink, and healthcare products, May 2013 – April 2018



Top functional claims for senior products

Global: Functional claim penetration of senior food, drink, and healthcare products, by region, May 2013 – April 2018

Global		Asia Pacific	
Claim	%	Claim	%
Other claim	34	Other claim	20
Bone Health	26	Bone Health	17
Immune System	12	Digestive Health	7
Brain & Nervous System	10	Antioxidant	5
Digestive Health	9	Cardiovascular Health	3

Note: 'Other claim' includes food, drink and healthcare products with functional benefits not covered by the other functional claims such as "nourishes the lungs" and rehydration are examples of this type of functional claim.

Target senior women with bone health products

- Asian women are not getting enough of these nutrients, which increase their risk of osteoporosis and other diseases.
- Chinese elderly women aged 60 years or older have an average Vitamin D level of <30 nmol/L, presenting vitamin D deficiency compared to the recommended Vitamin D level is 50-74 nmol/L, according to The Asia Pacific Regional Audit of IOF..
- In China, 21% of females aged 55-74 have osteoporosis but not taking any measures.

Fonterra Anlene Gold High Calcium Low Fat Milk Powder (Hong Kong)



The product contains **whey protein; vitamin D, magnesium and zinc** to help maintain strong and healthy bones; and collagen for joint health and flexible movement and is specially designed for adults from 51 years of age.

Caltrate Calcium Carbonate and Vitamin D3 Tablet (China)



Contains **600mg calcium and 125 IU/IU vitamin D3** to replenish calcium and to aid in bones formation. It is said to help prevent osteoporosis, and is recommended to serve one to two tablets daily.

Immunity health products for seniors have an untapped potential in China

IsoWhey Clinical Nutrition Advanced 55+ Nutritional Support for Healthy Ageing with Fibre (Australia)



Contains **vitamin C, B6 and B12** which contribute to a normal immune system and energy.

Ozi Choice Seniors Milk Powder (China)



The milk is enriched with vitamins and minerals including: vitamin E for strong bones; vitamin D to boost vitality; **vitamin A for vision and immunity**; protein for healthy tissue repair; and added magnesium for mobility.

- With Asia's elevated ageing population's vulnerability to various diseases, there is an opportunity for manufacturers to tap seniors as their potential market.
- 40% of Chinese seniors aged 55-74 are aware of having poor immunity.
- only 6% of senior Chinese with poor immunity are taking health supplements for this and 21% are not taking any measure to improve their poor immunity.

Opportunities for products that help seniors to stay active

The World Health Organisation recommends, for adults age 65+:

At least **150 minutes of moderate-intensity aerobic activity** throughout the week.

or

At least **75 minutes of vigorous-intensity aerobic physical activity** throughout the week.

Turmeric for arthritic pain



The supplement may be beneficial for temporary relief of arthritic and osteoarthritic pain, by reducing joint inflammation and swelling, increasing joint mobility associated with arthritis. (New Zealand)

Capsules for walking



Formulated with black ginger extract, to maintain walking ability of the middle-aged and the elderly. (Japan)

90 years apart but they have very similar needs

**Smaller
appetites**

**Taste and nutrition
challenges**

**Limited
motor skills**

**Difficulties chewing
and swallowing**

From baby foods to senior foods



Kewpie Baby Food White Fish & Vegetable Stew (Japan)



Kewpie Baby Food Happy Recipe Creamy Codfish Gratin with Rice (Indonesia)



Kewpie Yasashii Kondate White Fish & Vegetable (Japan)

Japanese producers use a system that guides caregivers



Group 1

Able to chew easily



Group 2

Able to smash with gums



Group 3

Able to smash with tongue



Group 4

Able to swallow without chewing

- Japan's Universal Design Food provides guidance for seniors and caregivers.
- Soft foods fall into one of four categories that rate the food based on hardness, stickiness and how easy it is to chew

Demographic focus: NHS' Meritene for healthy ageing

MERITENE® is a range of nutritional products designed to address the needs of older adults. Each MERITENE® formula consists of one or more nutrients such as dietary fiber, protein, vitamins and minerals.



Global: Percentage change of nutritional therapy* food, drink, and healthcare product launches, February 2011 – January 2018

Claim	% change: Feb 2011 - Jan 2012 - Feb 2017 - Jan 2018
	%
Seniors (aged 55+)	585
Children (5-12)	-8
Babies & Toddlers (0-4)	-35

*Nutritional therapy products include food, drink, and healthcare products with specialized nutrition (e.g. Foods for Medical Purposes, Specialised Nutrition – unspecified)

Source: <https://www.nestlehealthscience.com/brands/meritene>

Senior nutrition for sarcopenia

- Research shows that proper protein distribution also may help prevent age-related sarcopenia, the loss of muscle mass with age. To lower the risk, research suggests **25g to 30g of protein per meal** in older people.

Nutricia FortiFit Vanilla Flavoured Dietary Food for Medical Purposes (Italy)

Contains **21g of protein/serving**, sweeteners with essential amino acids, including **leucine**, that stimulate muscle protein synthesis and play a vital role in the reconstruction of the muscles.



Maeil Dairies, a Korean agro-industry giant has launched a research center dedicated to research and development projects focused on muscle loss resulting from aging.

Looking to branch out into businesses targeting senior customers, as low birth rates and an aging population are changing the country's demographics.

Engay food: Textured modified food development for seniors in Japan

- Engay/Enge(嚥下) is Japanese for swallowing.
- Dysphagia is difficulty in swallowing or the accidental breathing in of food or liquid into the trachea
- Problems caused by dysphagia:
 1. Less enjoyment of eating or drinking
 2. Poor nutrition and dehydration
 3. Risk of aspiration and risk of choking



Regular Food



Texture-modified-food



Minced Food



Pureed Food

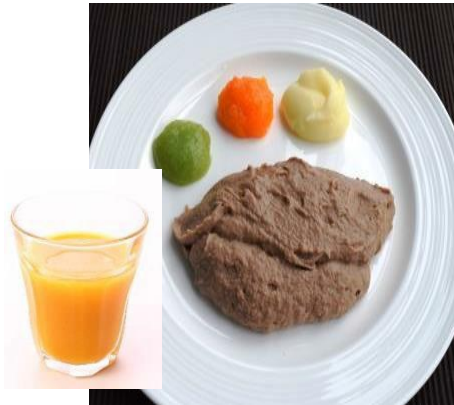


NUTRI has developed food texturizer for dysphagia patients

NUTRI Instant Food & Liquid thickener



3g=0.1oz



NUTRI food thickener for jelly & texture modified food



NUTRI food thickener for Rice porridge jelly & texture modified food



World's awareness on ageing through initiatives and programs



THE GREEN LEAF
RETIREMENT RESORT

An award-winning waterfront resort located only 1 hour from Kuala Lumpur City and 20 minutes from the International Airport.

- Resort Style Living -
- Assisted Living & Nursing -
- Healthcare & Emergency Response -



Anlene repositions brand to be less for silver generation

- Traditionally Anlene's proposition has been around **mobility** and **prevention of bone health**.
- **Heart Max** targeted towards maintaining heart health is about 'growing young together' – communicating the message that life should be lived in full



THRIVE for better nutrition strategy for seniors



9g protein
PER SERVING

24 vitamins
and
minerals

260 calories
PER SERVING

GLUTEN
GF
FREE

U D

2
MILDLY
THICK
NECTAR

Thrive Ice Cream and Gelato are ideal **meal supplement, dessert, or snack** to support nutritional strategies for healthcare patients and seniors.



9g protein
PER SERVING

24 vitamins
and
minerals

6g fiber
PER SERVING

Canadian
BC30
CULTURES

REAL

GLUTEN
GF
FREE

U D

2
MILDLY
THICK
NECTAR

Key takeaways for the future:

Consumer & Medical needs

- Seniors' challenges: smaller appetite, taste and nutrition, limited motor skills, and difficulties in chewing and swallowing.
- Consider the key health and nutrition targets and issues for seniors.
- The opportunities for foods for medical purposes are likely to expand as populations continue to age.

Preventative

- Senior consumers are health conscious, and want to preserve their good health for the future. Products that enable consumers to stay healthy, fit and active should prove attractive.

“Ageless”

- Seniors do not want to be categorised, but do have some age-specific dietary and nutritional interests and considerations. Food, drink and supplement manufacturers can innovate in these areas.
- To reach seniors effectively, empower them to go on living the life they love rather than selling cures for being old.

