



Getting Ahead of the Curve: Mental Performance & Brain Health

By Dr. A. Elizabeth Sloan

“Retaining mental sharpness as I age” is the new top health concern and nearly two-thirds of adults (65%) are “extremely/very concerned” about it, followed by cardiovascular disease and cancer (HealthFocus, 2009). Alzheimer’s is the 3rd fastest growing health concern, just behind eye health and arthritis; mental focus is tied with high cholesterol for 4th.

With 96 million Americans over age 50, appealing to older folks alone represents an enormous market opportunity. But while concern over mental sharpness increases with age, 59% of those aged 18-29, 55% 20-39 and 61% 40-49 vs. 70% of those 50+ are also “very/extremely concerned.”

Perhaps most exciting from a marketing standpoint is the diversity and uniqueness of mental need states confronting consumers—ranging from proper brain development, hyperactivity and cognitive/learning skills in children, to depression, concentration and alertness in

young adults, and to more serious memory loss, dementia, Alzheimer’s and Parkinson’s disease in aged adults.

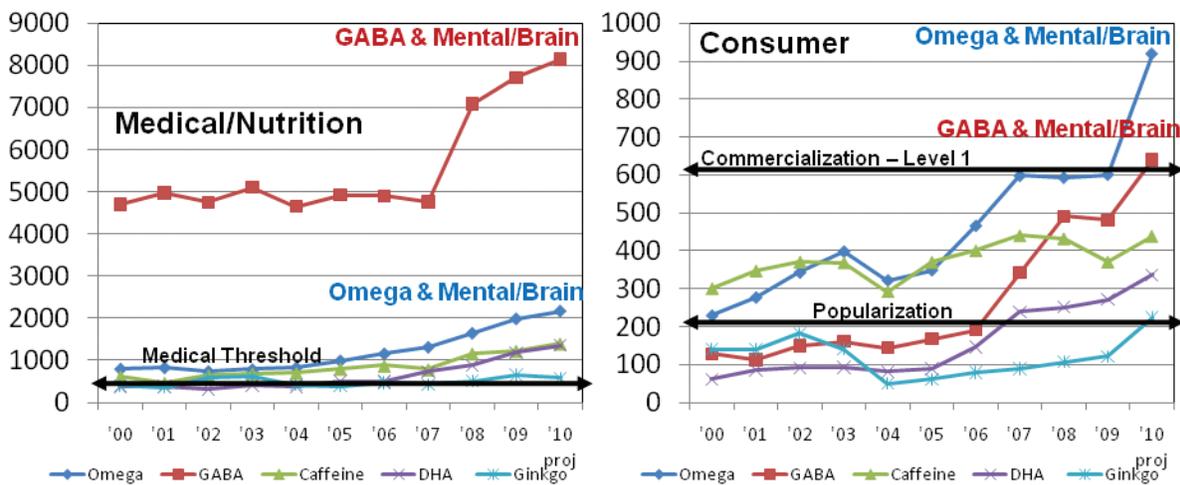
Market Potential

According to Sloan Trends TrendSense model, when it comes to ingredients “specifically linked to mental conditions/brain health” only omega 3s have reached mass market status, hovering close to crossing into the Commercialization Phase since 2007 when DHA-fortified dairy products began drawing attention to brain health in grocery stores. Further, 71% of adults rate omega 3/fish oil “very” or “somewhat” effective for brain health compared to 74% effective for heart health.

GABA (gamma aminobutyric acid) has enjoyed significantly more medical and research activity than other competitive ingredients with mental/brain connections, accelerating at an explosive pace since 2007; however, its awareness among consumers is still relatively low. GABA is projected to achieve mass market status this year. Medical/Nutrition activity for omega 3, DHA and caffeine are also at significant levels, having crossed over the Medical Threshold earlier in the decade, signaling their stability as long-term, sustainable ingredients for mental health.

In terms of market receptivity, caffeine and DHA, while viable markets among specialty channel and condition-specific shoppers, are still at least a year or more away from achieving mass market status—and only if Medical activity remains strong. While ginkgo and ginseng have frequently been tied to energy, activity specifically tied to mental issues has not yet crossed the Medical Threshold. If the current growth rate continues, they will soon

TrendSense™ Predictive Model: Mental-Brain Ingredient Health Linkages



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* Although there are many factors that go into determining consumer trends, measuring how medical/nutrition activity levels have risen over the past decade, as well as some of the key milestones that have occurred and how these issues have been understood and embraced by the public are essential in predicting the sustainability of the Consumer trend line.

be well positioned as viable mental health ingredients in specialty channels. Phosphatidylserine remains in the Emerging Phase.

Growth Opportunities

- 62% believe that supplements and/or functional foods/drinks can be effective in preventing/delaying normal age-related memory loss; 55% Alzheimer's (Gallup, 2009).
- 47% of functional food/drink purchasers want more products for enhancing memory; 41% mental focus (Mintel).
- 58% who do not currently consume foods/drinks to improve mental performance are interested in trying them (IFIC, 2009).
- < 10% of those aged 54+ bought a functional food/drink for mental sharpness—high potential for growth (Mintel).
- 35% usually/always choose foods to improve their daily performance (HealthFocus, 2009).
- Awareness of omega 3s (67%) is much higher than other ingredients associated with brain health: DHA 18%, choline 13% (Gallup, 2009).
- 5.3 million Americans have Alzheimer's disease; 1 in 8 people aged 65+ (13%) have Alzheimer's, a number expected to reach 7.7 million by 2030 and 11-16 million by 2050. (Alzheimer's Assn, 2010).
- An estimated 21% of Americans have mood disorders (NIH).
- 8.5% of all children ages 5-17 have Attention Deficit Hyperactivity Disorder (ADHD); 9% a learning disability (NHIS, 2008).

Functional Foods & Beverages: About 71% of consumers believe that some foods/beverages can improve mental performance (IFIC, 2008). Moreover, 23% bought a functional beverage and 17% a functional food to attain mental focus last year (Mintel, 2009). Those 18-24 are the most interested in memory enhancers (55%) as well as mental focus (57%), indicating that the delivery form should most likely be a beverage, shot, bar or confection (Mintel). Fruit/vegetable juices, savory snacks, yogurt, milk and soup are other foods consumers are interested in buying to “improve memory and concentration” (HealthFocus, 2009).

Although 64% of consumers say they're trying to limit their caffeine intake, 32% believe that caffeine can help to relieve headaches; 24% improve performance on mental tasks; and 10% reduce the risk of brain and/or nerve diseases, e.g., Alzheimer's and Parkinson's (IFIC, 2008).

Lastly, 59% of consumers believe that eating breakfast can help increase mental focus, which is clearly an untapped positioning opportunity (IFIC, 2008).

Dietary Supplements: With those aged 55+ being the heaviest users of dietary supplements and the least likely to use functional foods, supplements are in a unique position to attract an older audience and should focus their attention on mental issues of concern to those consumers. Those aged 65+ are twice as likely to use omega 3 as the rest of the population (Pkg. Facts 2008).

New North American supplement products making a brain/mental/mood claim jumped from 83 in 2007 to 466 in 2009; global introductions from 125 to 634 (Innova Market Insights, 2010). U.S. consumer sales of brain health/mental acuity supplements reached \$385 million in 2007, mood supplements \$283 million (NBJ).

More than four in 10 (44%) adults made a strong effort to consume fish oil/omega 3, DHA/EPA in 2009; 22% green tea and 10% ginseng (Gallup, 2009).

References furnished upon request.

About the author: Dr. A. Elizabeth Sloan is president of Sloan Trends, Inc., Escondido, CA, which is a consulting firm that offers trend-tracking and predictions, strategic counsel and business-building ideas for food, supplement and pharmaceutical marketers. Each month she will provide analysis and discuss opportunities of a particular market being covered in a given issue.

SLOAN TRENDS' TRENDSENSE is a 15-year-old trend tracking system, which identifies and quantifies trends as well as predicts the optimal timing, sustainability and life-cycle stage of ingredients, terms, product opportunities and related market issues.

The model displays medical and consumer “activity levels” based on a comprehensive analysis of five critical sources of information—consumer, trade and competitive, legal and regulatory and media coverage. The resulting charts give insight into the market's changing health issues and concerns, the ingredients that are up-and-coming and those that have just about run their course, as well as what health claims, marketing messages and products will bring your company the most success.

- **Emerging Phase** = Trends begin to appear on the radar screen. Companies should begin to collect literature and market details for those that exhibit continual growth and that might be of interest.

- **Popularization Phase** = Medical/Nutrition crossover to consumer media and marketplace; opportunity for niche or specialty markets. Marketers/manufacturers should begin a detailed evaluation of the supporting marketing and scientific data and determine if this term/trend offers a good strategic fit and is appropriate to pursue. Appropriate product development procedures should be undertaken.

- **Commercialization Phase** = Mass-market ready. Main-stream consumers have a significant degree of familiarity with the term/trend and there is opportunity for competitive advantage by getting out ahead of the competition or by providing a unique and highly innovative product positioning for success.