



Trends in tortillas

Europe

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Trends in Tortillas for Europe

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ABOUT INNOVA MARKET INSIGHTS

**GLOBAL
CONSUMER
DASHBOARD**

25 YEARS OF
TRENDS
INSIGHTS

350,000
NEW PRODUCTS ANNUALLY



130
MILLION
RECORDS

**WORLD'S BIGGEST
FOOD DATABASE**

85 COUNTRIES
COVERED



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professionals.

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shelf and markets.
They know the
players and
technology.

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Innova Market Insights is a leading market research company, serving our customers with our unique and powerful **Innova Database**: the world's largest database for the food industry, used by leading companies in food ingredients and manufacturing for future success in the dynamic FMCG/CPG industry.



European Market Overview

The world gets smaller, its cuisines get closer

THE FOOD TRUCK EFFECT



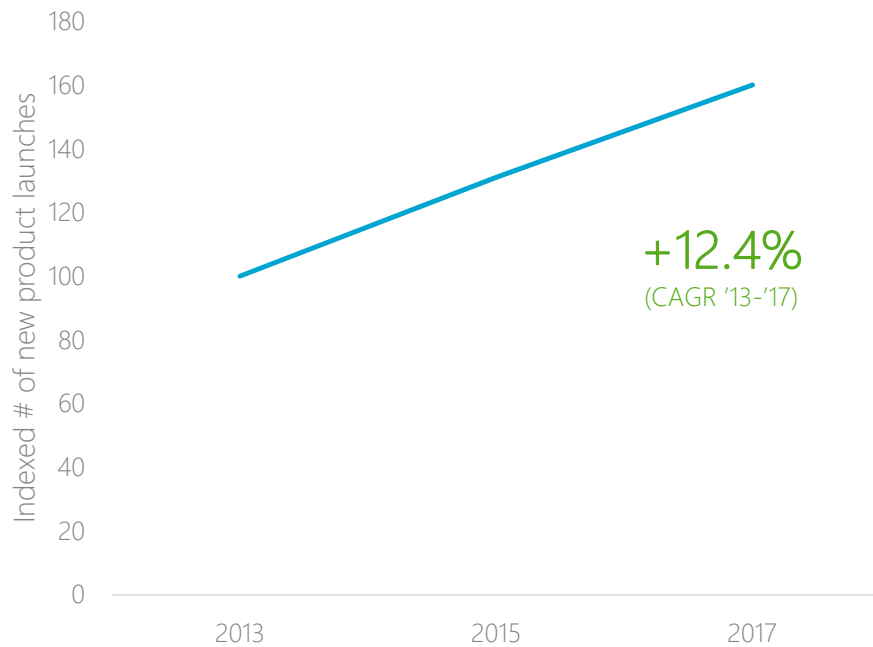
A CONNECTED WORLD PROMPTING CURIOSITY



Mexican fever, from street stands and restaurants to retailer

MEXICAN RELATED LAUNCHES FLOURISH

Indexed number of new product launches tracked featuring a Mexican dish* claim (Europe, Index 2013=100)



*taco, enchilada, burrito, fajitas, quesadilla.

MEXICAN INSPIRATION ACROSS CATEGORIES



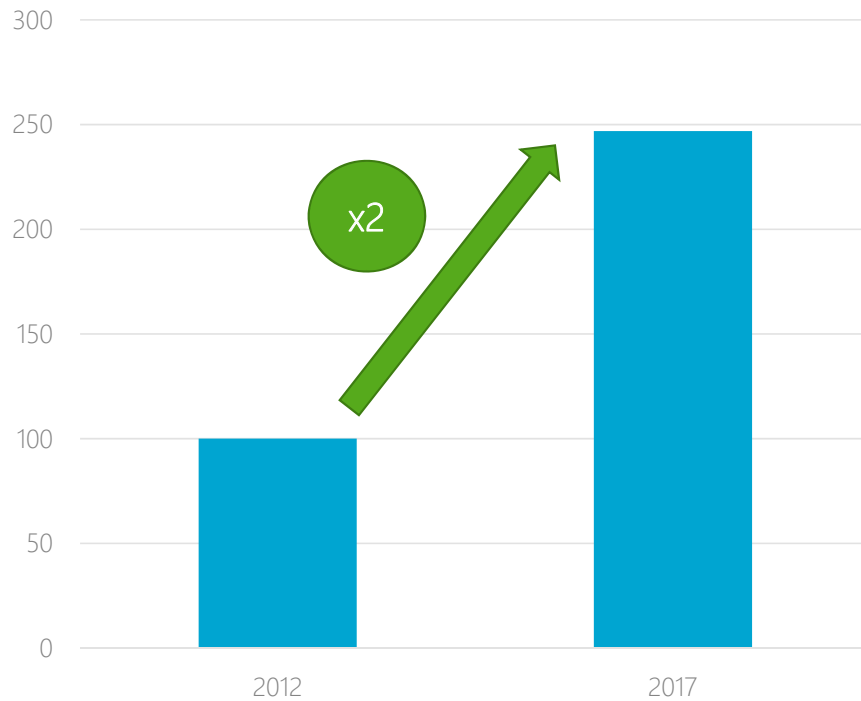
Tacos, Europe's new favorite comfort food?



Taco fever, from street stands and restaurants to Europe's shelves

RETAIL TACO RELATED LAUNCHES FLOURISH

Index number of new product launches tracked with "taco" claims (Europe, Index 2013=100)



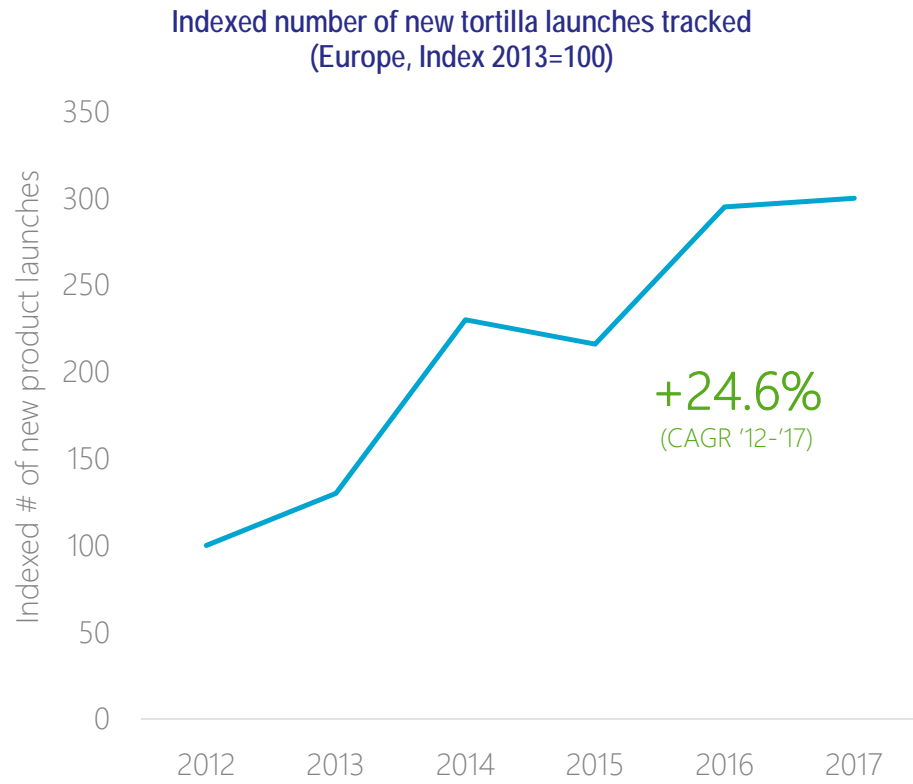
TACOS STEP INTO THE SPOTLIGHT



...and what is a taco without a tortilla?

Tortilla launches in Europe will remain on growing

TORTILLA LAUNCHES ARE INCREASING OVER TIME

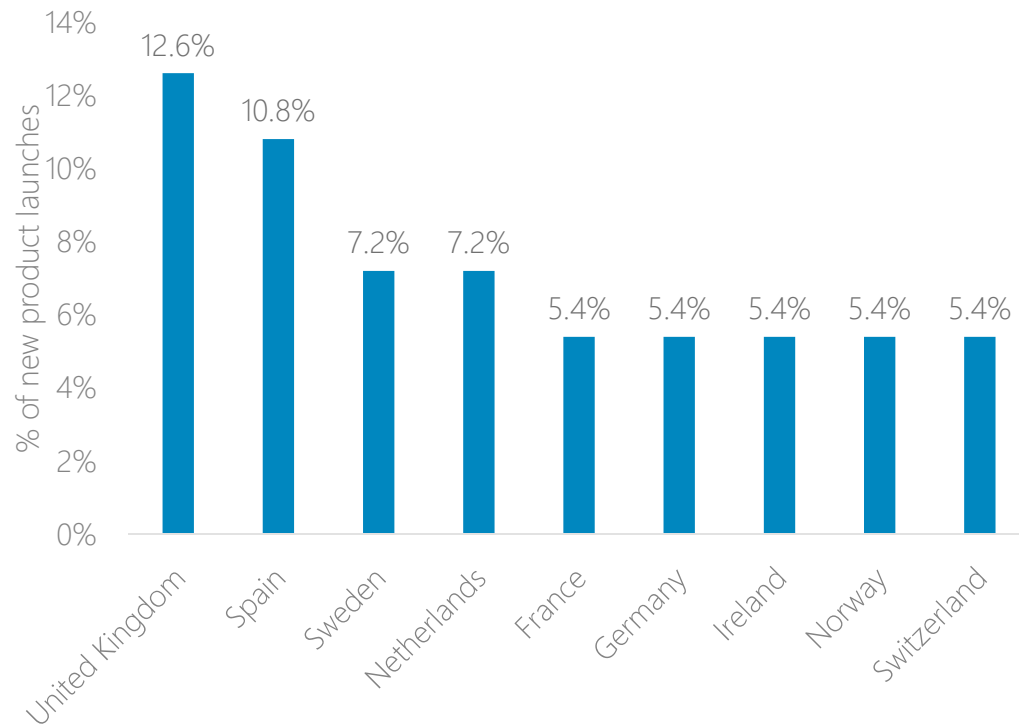


INNOVATION AND SEGMENTATION TAKING PLACE



UK and Spain, top markets for tortilla launches in Europe

Top countries of new tortilla launches tracked (Europe, 2017)



1 in 10 new tortilla launches comes from UK or Spain (2017)

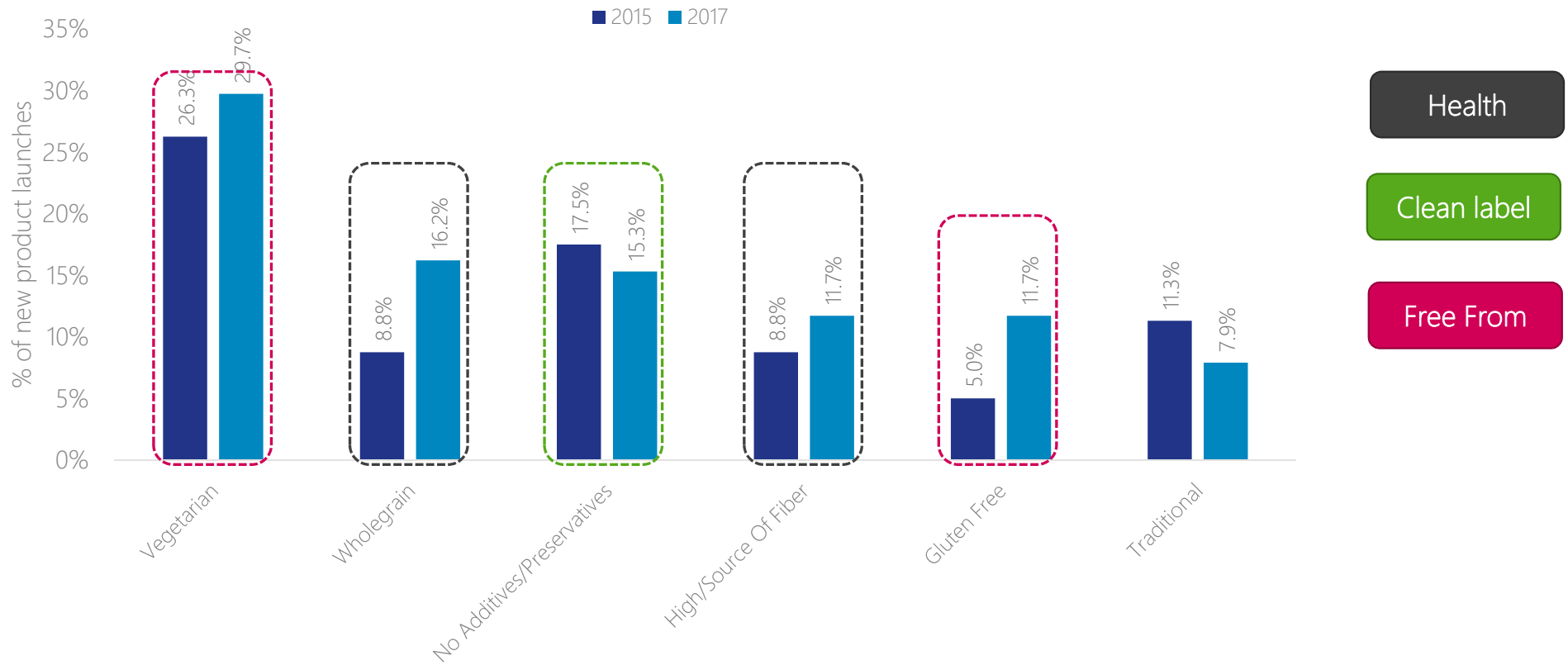


Santa Maria Latin American Kitchen 8 Soft Tortillas With Whole Wheat

United Kingdom, Jun 2017

Free from, clean label and health: key trends driving tortillas NPD

Top positionings as percentage (%) of new tortilla launches tracked (Europe, 2017 vs 2015)



Opportunities will remain strong for wholegrain and gluten free claims

WHOLEGRAIN



+40%
(2017 vs.
2016)

Old El Paso 8 Medium Super Soft **Whole Wheat** Tortillas

Norway, Apr 2017

DESCRIPTION Eight soft wheat tortillas of wholegrain.
A fuller bread with a lot of dietary fiber.

GLUTEN FREE



+33%
(2017 vs.
2016)

Santa Maria **Gluten Free** Tortilla

Norway, Oct 2017

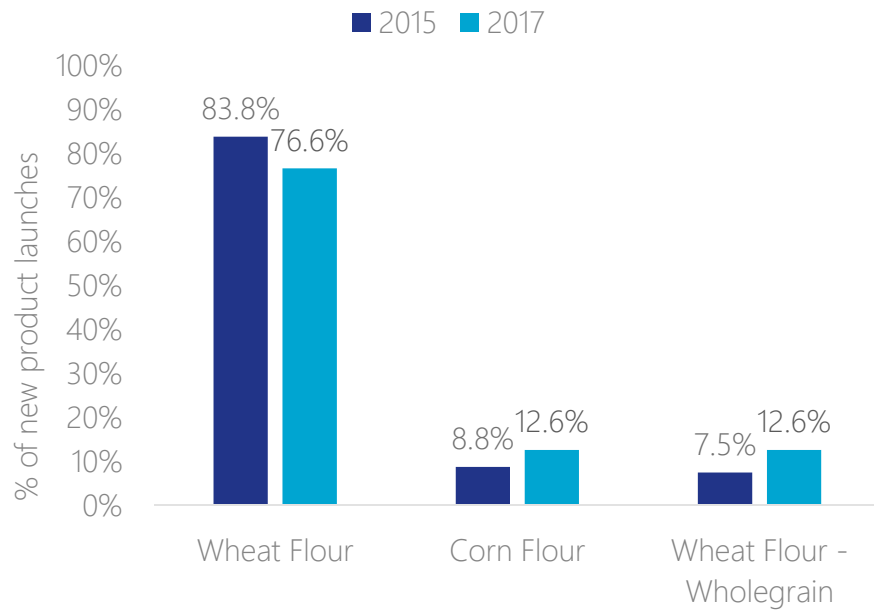
CLAIMS Finally a gluten-free tortilla **with the same good taste as a regular tortilla**. Soft and stone baked. Gluten free. **Experience gluten free TexMex.**

As opposed to the traditional corn tortilla, wheat flour remains as top flour

TOP TYPES OF FLOUR IN TORTILLAS

- Wheat flour – wholegrain is the fastest growing flour type.

Type of flour as percentage (%) of new tortilla launches tracked (Europe, 2017 vs. 2015)



Flour with < 14 new launches tracked in 2017 are excluded from the analysis

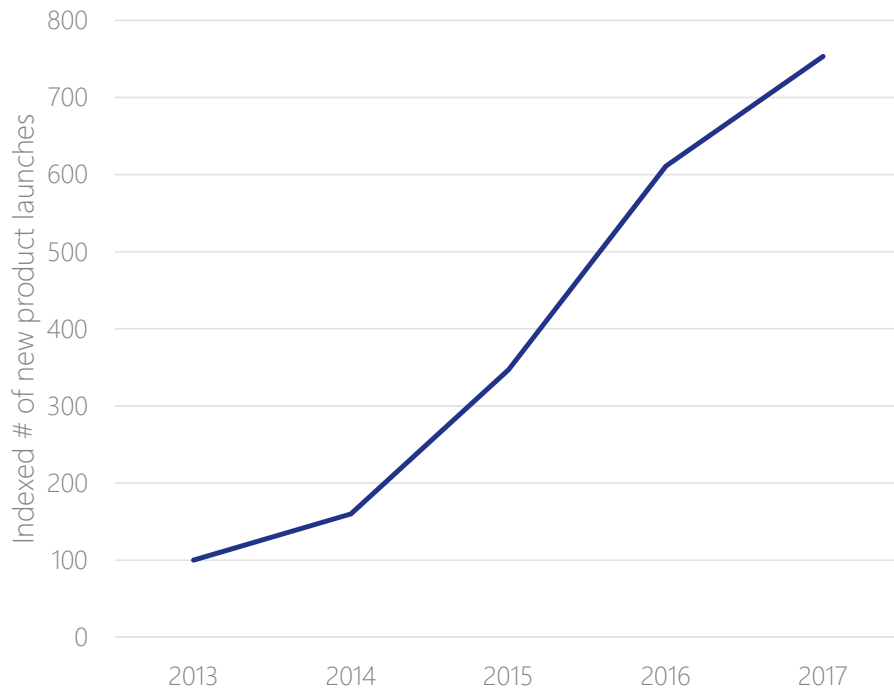
WHOLEGRAIN AND SEEDS FOR A HEALTHIER APPEAL



“Eating green” trend also brings innovation to the tortilla segment

PLANT-BASED CLAIMS SOAR

Indexed number of new F&B launches tracked with plant-based claims (Global, index 2013=100)



PLANTS BRING NEW FLAVORS

- Consumers are looking for innovative options to take the inherent benefits of plants into their daily lives and drive innovation of new plant-flavored products.



Beetroot tortilla's



Spinach wraps

Tortillas going green (er) with the inclusion of more plant-derived ingredients



"herbs (oregano, basil, marjoram, thyme)"



"with 45% carrots"



Key players in the European tortilla segment

Top companies for tortillas launches tracked
(Europe 2012-2018YTD)

General Mills



Santa Maria



Lidl



Mission Foods



Snack Food Poco Loco



Tesco



Watch out for ...

LA MORENA



La Morena Tortilla Mais: Corn Tortilla

Netherlands, Jun 2017

DESCRIPTION Eight pieces of corn tortillas in an easy-to-open and resealable plastic packet. These tortillas are a delicious base ...



La Morena Tortilla Volkoren: Wholegrain Tortilla

Netherlands, Jun 2017

DESCRIPTION Six pieces of wholegrain tortillas in an easy-to-open and resealable plastic packet. These tortillas are a delicious ...

MEXIFOODS



Mexifoods 6 Tortillas Integrales De Trigo: 6 Wholemeal Wheat Tortilla

Spain, May 2017

DESCRIPTION Six wholemeal wheat tortilla in a 240g plastic packet.



Professional. 20 Tortillas De Trigo: 20 Wheat Tortillas

Spain, Feb 2017

DESCRIPTION Twenty wheat tortillas of 12cm diameter, in a 360g plastic packet.



Inspiration for Innovation

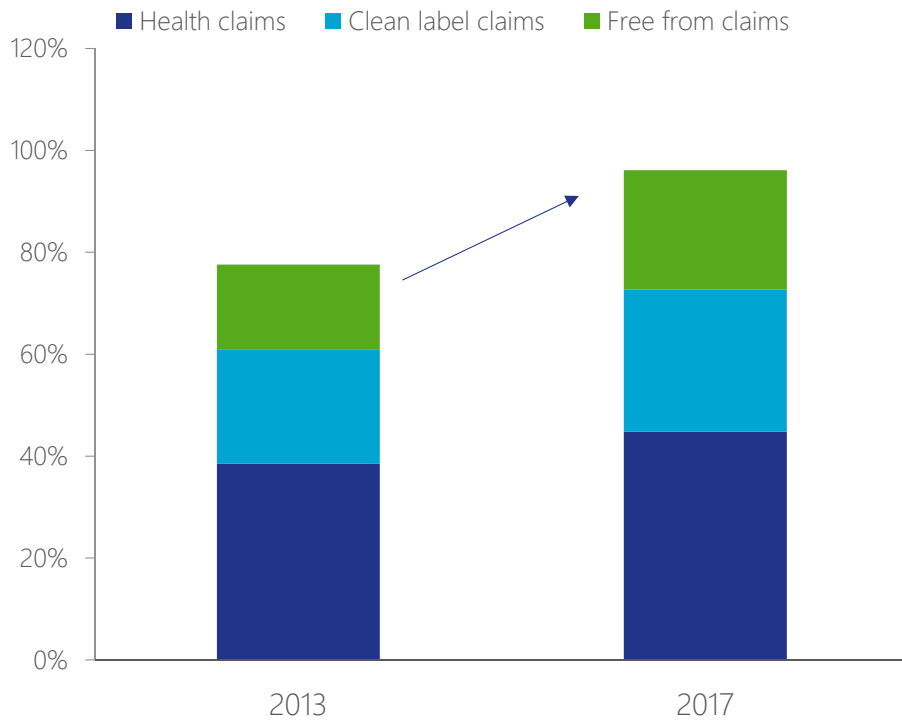
Top Ten Trends 2018 - Potential for tortillas



Mindful consumer– what I eat is good for me

F&B PRODUCTS INCREASINGLY CARRY MULTIPLE CLAIMS

% of food & beverage with the selected claims
(Global)



MORE NPD CONVEYING OVERALL GOODNESS

- Better for you* related claims have increased their market penetration from 42% in 2013, to 49% in 2017.



Lighter Enjoyment

- Lightness is gaining NPD momentum as consumers look to balance enjoyment with health.



Gran Luchito Lightly Salted Mexican Tortilla Chips

United Kingdom, May 2018

DESCRIPTION Lightly salted Mexican tortilla chips, in a 170g plastic packet. Great for dipping.



Mission Simply Salted Tortilla Chips

France, Jul 2018

DESCRIPTION Thin and crispy salted corn tortilla chips in a 200g plastic packet.



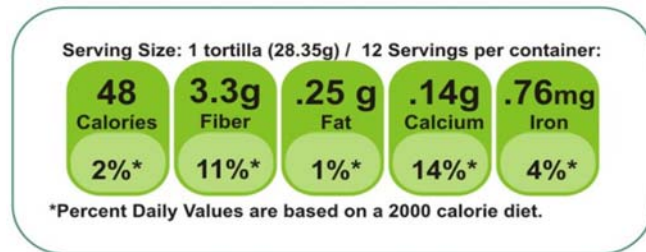
Tortilla Mexicana Fit

Romania, Mar 2018

DESCRIPTION Six whole grain wheat tortilla in a plastic packet.

Tradition in hand with healthy innovation

- Tortillas de Guanajuato, talks of ancient Aztec communities and the maíz god. It's a story which clearly inspired the brand's gluten free green corn tortillas that are made with a "super food", Nopal cactus leaves.
- The brand introduces Tortillas NutriorganiC, this functional product, according to the company, offers tortillas fortified with cactus and flaxseed, which aid the "control of diabetes, cholesterol and triglycerides."



System:



Defined this blend of nopal, linseed and inulin, under the system Fiber Full.®



Dining out, in: from restaurant/food truck experience to the aisle

FROM FOODSERVICE...



POPO
CATE
PETL

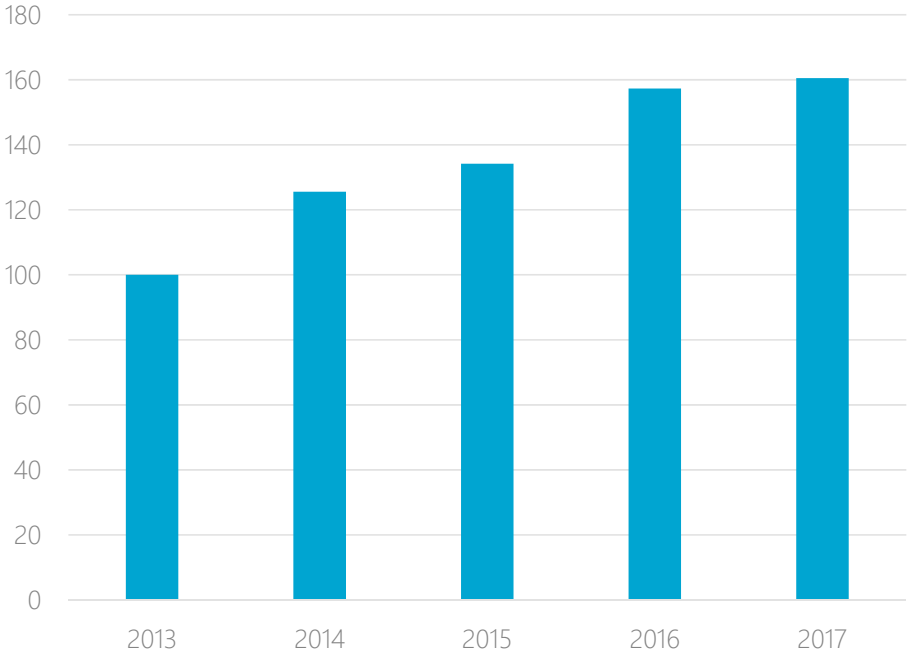
TO RETAIL



“Restaurant quality” on the rise

GOURMET, RESTAURANT AND CHEF CLAIMS

Index number of new product launches tracked with “gourmet”, “restaurant” or “chef” in the product brand or description (Global, Index 2013=100)



RESTAURANT QUALITY FRONT OF PACK



Bountiful Choice: brands seek to cater to individual tastes and needs

Greater flavor variety and creative use of positioning to distinguish products on the shelf



Jacksons Honest Salsa Fresca Tortilla Chips Slow Cooked With Coconut Oil

United States, Jun 2018

DESCRIPTION Blue corn tortilla chips with salsa fresca (pico de gallo) and slow cooked with coconut oil. Comes in a 156g plastic ...

Jacksons Honest Red Corn Sprouted Tortilla Chips Slow Cooked With Coconut Oil

United States, Jun 2018

DESCRIPTION Sprouted red corn tortilla chips slow cooked with coconut oil. Comes in a 156g plastic packet.

Jacksons Honest Lime And Sea Salt Tortilla Chips Slow Cooked With Coconut Oil

United States, Jun 2018

DESCRIPTION Lime and sea salt flavored corn tortilla chips slow cooked with coconut oil. Comes in a 156g plastic packet.

Jacksons Honest Blue Corn Tortilla Chips Slow Cooked With Coconut Oil

United States, Jun 2018

DESCRIPTION Blue corn tortilla chips slow cooked with coconut oil. Comes in a 156g plastic packet.

Increasing interest in “authentic” (European) Mexican tortillas

- 1 in 5 new tortilla launches tracked in Europe in 2017 feature a Mexican claim*.



"made using a unique process that dates back to the Aztecs bringing a true corn taste and light texture. With a versatile oval shape, these are ideal for the perfect Mexican taco experience"

"made following the traditional Mexican recipe"



*Mexican claim: "Mexican style" "Mexican tradition" "Mexicana" "from Mexico" "authentic Mexican" "traditional Mexican"

Beyond classics, a twist to classic tortilla chips



Mission Organics Blue Corn Tortilla Chips With Sea Salt

United States, Apr 2017

DESCRIPTION Organic, **authentic Mexican blue corn tortilla chips** with sea salt, in a 255g plastic packet.



Rude Health Black Bean Cornitas

United Kingdom, May 2018

DESCRIPTION **Corn tortilla chips with black beans and olive oil**, in a 30g plastic packet. Cornita is an old-Mexican for a love ...

Stepping out of the tortilla box

COOKIES



Sondey Salty Cookies With Tortilla Chips

Sweden, Jun 2018

DESCRIPTION **Salty cookies with 19% tortilla chips**, in a plastic packet.

READY MEALS



Bienvenido Mexiko Hahnchen Mini-Schnitzel Teuflich Scharf: Extra Hot Chicken Mini Schnitzel

Germany, Jun 2018

DESCRIPTION Frozen extra hot seasoned chicken schnitzel, in a 500g plastic packet held in a carton box.

SOUP



Panera Bread At Home Chicken Tortilla Soup

United States, May 2018

DESCRIPTION Roasted corn and poblano peppers, black beans, tomatoes and chicken seasoned with chilies, hints of cumin and lime. ...

CHOCOLATE



El Tequito Milk Chocolate With Tortilla Chips

Belgium, May 2018

DESCRIPTION Milk chocolate with toasted and salted corn chips, in an aluminum foil wrapper held in a 200g carton box.

A top-down view of various fresh ingredients including mushrooms, tomatoes, basil, and spices on a dark surface. The ingredients are arranged in a circular pattern around the center text. There are several mushrooms, some whole and some sliced. There are also tomatoes, some whole and some sliced. Basil leaves are scattered throughout. There are also some spices, including what looks like a small bowl of mixed spices and a small bowl of white powder. A wooden mortar and pestle is visible in the upper left quadrant. The background is a dark, textured surface.

What's next?

Trends in tortillas

- Positive outlook. There will be increased opportunity for innovation and new variant NPD as shoppers demand variety.
- Health and taste. New highs of obesity has consumers looking for healthier options, but they are not prepared to compromise on taste. Manufacturers of baked goods can bet on:
 - Capitalizing on better-for-you claims, mainly driven by free from, clean label and health (wholegrain) claims.
 - Appealing to Millennial audiences looking for “more transparent” processing methods, stories behind the product will add value and prompt trust.
 - As opposed to the traditional Mexican corn tortilla ,in Europe, wheat flour will remain as the top flour applied in the segment. Nevertheless, corn will keep on increasing catering mainly to gluten free and/or “extra Mexican experience” seekers.





THANK YOU!

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