

# 2018 EXPO WEST RECAP

As the leading analytics partner to the natural industry, the SPINS team arrived at Natural Products Expo West 2018 with a broad perspective on the history and evolution of this exciting marketplace, as well as rapt anticipation for the innovation we have come to expect from this event. This year's show gave us lots to chew on, so here we'll highlight the ideas, brands, and products that our team believes reflects the direction of the natural industry, the progress, and the potential to shape a more vibrant marketplace. Read on for our observations and several of our favorite finds from Expo West!

## ORGANIC PLUS AND REGENERATIVE AGRICULTURE: THE NEXT PHASE OF STANDARDS IN NATURAL

Regenerative agriculture certainly held the spotlight at this year's show, with dedicated educational events, film screenings, panel discussions, and workshops throughout the week. On stage and on the show floor, powerhouses of the Natural Products Industry lent their support to the new **Regenerative Organic Certified (ROC)** program. Other emerging brands are building their business foundations on this concept of improving environmental conditions and soil health through the process of growing and raising food, as well as building other beneficial impacts for both animals and humans.

**Patagonia Provisions** sampled its growing collection of bars, breakfast grains, meat and seafood snacks, and soups and chilis. (The organic Inca Berry + Almond bar with baobab and chia and the [reef-net-caught salmon](#) were highlights for one of our tasters!) The brand also shared its adjacent booth space with the new certification and its advocates, including **Dr. Bronner's** and **The Rodale Institute**, explaining the three key tenets of Regenerative Organic Certification: soil health, animal welfare, and fair treatment of farm workers. Other big brands are on board, too, with **Maple Hill Creamery** partnering to establish the certification and **Justin's** and **Vega** pledging to enroll certain product lines.



On the smaller side, **Sol Simple** was another exciting brand displaying a Regenerative Organic Certified plaque in the booth. The vertically integrated company sources bananas, cashews, dragon fruit, mangos, papaya, passion fruit, and pineapple from Nicaragua, focusing on certified organic and regenerative training and production, female farmers, and smallholder farms for its dried fruit snacks, juice, powders, and purées. In addition to the brand's "seed to shelf" ethos, the company is a Certified B Corporation, and its foods are EarthKosher certified, Fair Trade Certified, Non-GMO Project Verified, and Vegan Verified.



**Annie's Homegrown** debuted two limited-edition items available exclusively at **Sprouts Farmers Market** this spring: Bunny Grahams made with wheat and oats and Elbow Pasta & Cheddar made with wheat and peas. Both new products showcase the farmers, Casey Bailey and Nate Powell-Palm, front and center on the packaging to share their stories and educate consumers on the importance of regenerative agriculture to land health. At the same time, parent company **General Mills** announced its commitment to sourcing organic ingredients, helping to transition over 30,000 acres of farmland in South Dakota to supply wheat for Annie's Macaroni & Cheese products. General Mills is taking part in another emerging regenerative standard, founded by **The Carbon Underground** and **Green America**, also in partnership with **Ben & Jerry's (Unilever)**, **DanoneWave**, and **MegaFood**. [A press release about the new standard](#) states its goal as to "not simply restore soil, but to do it quickly...[creating] a scalable, achievable standard that can work across the Global Supply Chain."



Another industry-led initiative emerged at Expo West, and this one comes straight from farmers. The **Real Organic Project** is starting a new label that, like the others we've been watching, also treats USDA Organic as the baseline and requires additional layers of stewardship. The Real Organic Project states clearly that it's a direct response to recent rulings of the National Organic Standards Board (NOSB) that loosened USDA Organic standards, specifically around animal welfare regulations and the inclusion of container/hydroponic growing under the National Organic Program (NOP). The new certification's own Real Organic Standards Board is comprised first and foremost of organic farmers but also educators, former NOSB members, organic certifiers, policy experts, and scientists to represent five main stakeholder groups: certifiers, consumers, farmers, non-governmental organizations (NGOs), and retail stores.

Another one to watch is the **Land to Market** program from **The Savory Institute**, which also made its first foray at Expo West, focusing on helping the industry connect to source regeneratively produced food (dairy and meat) as well as textiles (leather and wool). The program underscores the need for and provides scientific metrics around the impact of land management, as opposed to its inputs and processes. The program focuses on connecting links within the supply chain and educating the industry and its consumers. It counts **EPIC Provisions**, **Applegate**, **Zuke's**, and **Union** as founding brand partners.

In Blueberry Bison Cacao, Bobotie Biltong Mango, and Pineapple Pork Sriracha flavors, Union's Whole Earth Bites proudly proclaim 11-12 grams of protein per serving, regenerative sourcing, and the combination of animal- and plant-based ingredients. The brand blends for flavor but also to create nutrient-dense snacks that sustain both the snacker and the environment where the food is grown and raised.

The Natural Products Industry has continuously navigated ambiguity and set its own high standards before, so we're looking forward to meaningful impact from this promising movement and these new certifications. One area we'll monitor closely, though, is how brands and certifiers communicate with clear, effective messaging so as not to confuse consumers, dilute their efforts, and give way to exaggerated claims and buzzwords on labels – as can arise with unregulated terms.



# CBD'S STARRING ROLE

Despite persistent jurisdiction and legality questions, CBD and hemp were hot topics at Expo West, and it looks like both manufacturers and retailers are betting on the popular compounds to prevail. **New Hope Network** organized the CBD Summit on Wednesday of Expo Week, bringing experts together to discuss the endocannabinoid system, CBD's impact on the industry to date, regulatory concerns, retail opportunity, and supply-chain challenges. Attendees arriving later may have missed the summit, but it's unlikely they would have missed the innovation CBD and hemp brands brought to the show floor. While CBD/cannabinoid ingredients got their start in supplements and therapeutic topical categories, SPINS data shows both dramatic growth and a much broader foothold in the marketplace for them.



SPINS data captures *Cannabidiol (CBD)* and *Cannabinoids* as values of the **Functional Ingredient** attribute in body care and supplement categories, showing triple-digit growth year over year to a \$12.6 million annual market across retail channels, with the Natural Channel representing 97.9% of total sales volume.\*

So far, most of CBD's sales have come from supplements, but the ingredient is quickly growing into food and beverage categories in a variety of functional innovations. **Weller** has launched a line of three coconut snack bites in Caramel, Chocolate, and Original flavors that incorporate full-spectrum hemp extract (and give the ingredient front-label billing). Weller's hemp is domestically and sustainably grown, and each bite offers 5mg of the functional ingredient (25mg in a full serving size). The brand positions the snacks for centering mental and mood benefits, relieving stress to allow consumers to "shift back into you."

**Buddha Teas** brings CBD into tea, offering nano-sized particles of water-soluble CBD in its organic Chamomile Blend, Matcha Green, Mint, Turmeric & Ginger offerings. Each SKU speaks to CBD's calming effects in addition to the individual benefits of other ingredients, conveying 5mg of CBD per cup.

As beekeepers first, **Colorado Hemp Honey** offers a unique hemp supplement delivery in raw, unfiltered honey produced at **Frangiosa Farms**, where the companies' founder maintains six apiaries in and around Denver. With a commitment to sustainable beekeeping practices, these brands combine this first passion with full-spectrum hemp extract (also grown in Colorado with no pesticides), offering both jars and portable, single-serve Chill Sticks. With organic essential oils, the hemp-honey supplements come in Ginger Soothe (and Ginger Snap Chill Stick), Lemon Stress Less (and Lemon Aid), Tangerine Tranquility (and Mandarin Magic), and Raw Relief (and Natural) flavors. What's more, the brand offers two hemp supplements for pets, as well: Crazy Bee Gone and Pain Bee Gone with added MCT oil for absorption and propolis for immune support. They're both marketed for calming effects and enhanced with a vegetarian bacon flavor.



CBD also made our list of [Trend Predictions for 2018](#), and we'll continue to watch its progress across categories...especially as the legislative environment continues to evolve. ([Read about Senate majority leader Mitch McConnell \(KY\)'s recent announcement that he will introduce a bill to legalize industrial hemp in Project NOSH here.](#))



# GOING AGAINST **THE GRAIN**

Post-Paleo influences have opened the door to numerous creative uses of fruits and veggies to reimagine grain-based foods. ([SPINS recently took a look at a few remarkable alternative flours on our blog here.](#)) At Expo West, we saw shelf-stable strides in cauliflower foods and found a few plantain-based favorites, too.

**From the Ground Up's** crackers, crisps, and pretzels taste great, delivering a satisfying crunch along with a full serving of veggies. While the snacks aren't entirely grain-free, the brand reformulated from its original recipes to increase its veggie-to-grain ratio and make cauliflower the primary ingredient. They're also Certified Gluten-Free by GFCO, Non-GMO Project Verified, and vegan. Crackers and crisps come in three flavors each: Cheddar, Nacho, and Sea Salt. Sea Salt Pretzels are available as sticks and twists.

Known for its pizza products, **Caulipower** entered the baking aisle with versatile Cauli-flour mixes in Paleo and vegan varieties. Suggested for recipes like bagels, brownies, cookies, flatbreads, muffins, pancakes and waffles, pie crusts, rolls and biscuits – plus pizza crust, of course – the mixes replace wheat flour at a 1:1 ratio. They're also Certified Gluten-Free by GFCO, certified kosher, and non-GMO. The Paleo mix is grain-free. (The vegan version is not.) Whether or not cauliflower itself continues to hold the spotlight, it's opening doors to veggie-forward formulations and new applications in several categories.

**RP's Gluten-Free** has rebranded, and the new **Taste Republic** label offers a variety of bean-based pastas as well as Plantain Linguini, made with cassava flour and tapioca starch in addition to the starring ingredient. Certified Paleo-Friendly, Certified Gluten-Free by GFCO, and nominated for a NEXTY award by New Hope Network judges, the new noodles were a hit with our eager tasters, who were pleased to see how well the unusual ingredient fared in this innovative format.



**Barnana**, known for snacks upcycling ugly bananas, also launched a plantain product at the show. The new organic plantain chips come in three flavors: Acapulco Lime, Himalayan Pink Sea Salt, and Sea Salt & Vinegar. Cooked with coconut oil, the chips have an appealing ridged texture and are also gluten-free, grain-free, kosher, Non-GMO Project Verified, and vegan.

# POWER PUFFS

Looking closely at the snack segment through SPINS' proprietary **Product Type** attribute, SPINS data shows puffed snacks are growing at a rate of 5.3% cross-channel, amounting to a \$1.8 billion market. In the context of the greater **SHELF STABLE CHIPS & PRETZELS & SNACKS** category (a \$20.2 billion space growing at 3.1%), puffs contribute 8.8% of total sales volume but an impressive 14.8% of the segment's growth.\* It's no surprise then to see the proliferation of puffed snacks across Expo aisles, but here we highlight a few examples, reflecting the diversity of the promising Product Type.



Although peanuts are an ingredient some manufacturers avoid for allergy reasons, certain brands are giving peanuts more play. Certified Gluten-Free by GFCO, organic, kosher, and Non-GMO Project Verified, **Puffworks** snacks combine corn and peanuts to yield dairy-free, plant-based, whole-grain puffs with 4-5g of protein per serving. In Dark Chocolate, Honey, and Original flavors, sugar content ranges from 2 to 5g. A fourth SKU called Puffworks Baby is formulated for early introduction to infants, aiming to prevent peanut allergies. Packaging shows a prominent front-label claim reading Pediatrician Recommended, and the brand cites the National Institute of Allergy and Infectious Diseases, the American Academy of Pediatrics, and the Learning Early About Peanut Allergies study on its webpage for the product. (SPINS noted the emergence of new peanut products for infants in our 2018 Trend Predictions webinar, and we've been watching the ingredient emerge in other ways [on our blog](#).)

The bases of other puffs ranged from the familiar – **Spokes** potato puffs come in classic chip flavors as well as more contemporary seasonings like Dill Pickle and Mango Habanero – to brightly rebranded **Crunch-a mame**, offering 6-7g of protein from edamame in flavors like Barbecue, Cheddar, and Ranch. **World Peas** Peatos puts peas and lentils together for a cheesy crunch that's overtly reminiscent of a certain conventional giant, but its twist adds 4g of protein and 3g of fiber to each serving in flavors like Classic Cheese, Chili Cheese, Fiery Hot, and Masala. **Jackson's Honest** and **LesserEvil** both celebrated new grain-free puffs with a cassava flour base, too. Jackson's Honest puffs come in Cheesy Cheddar, Crunchy Sweet Potato, and Spicy Cheddar flavors – all cooked in the brand's signature coconut oil. They're also Certified Gluten-Free by GFCO, kosher, and Non-GMO Project Verified. In LesserEvil's case, all three flavors are certified organic, Certified Paleo, and Non-GMO Project Verified, as well as labeled gluten-free and grain-free. In Himalayan Pink Salt, Himalayan Salt 'N Apple Cider Vinegar, and "No Cheese" Cheesiness flavors, the line is also vegan.



With its latest launch of KunaPops!, Ecuadorian superfood company **LiveKuna** gets its start in the snack aisle with quinoa and chia puffs that bring functional nutrient density to the shelf with smart, accessible branding. With added shelf-stable probiotics and three flavors – Spicy Chili, Tomato & Basil, and White Cheddar – the puffs are gluten-free, kosher, and vegan (except for the Cheddar flavor). The brand also partners with **ME to WE**, an organization working internationally to support positive change through service and also informed, empowered consumer choices around products that give back to the communities where they originate.



# ABUNDANT **ADAPTOGENS**

As a functional ingredient offering balance and resistance to stress, adaptogens were another one of SPINS' Trend Predictions for 2018. Countless brands at Expo West brought the trend to life, breaking out of supplement categories into new food and beverage applications across the show floor. We've narrowed the list quite a bit to bring you just a few of our favorite promising new products placing adaptogens front and center.

Ready-to-drink beverages with adaptogenic ingredients were everywhere at Expo, with established brands like **REBBL** bringing new SKUs to market, such as Schizandra Berries & Crème and 3 Roots Mango Crème (with ashwagandha), which joined other blends with maca and reishi, and emerging brands like **Goldthread Herbs** presenting plant-based tonics starring adaptogens like Schisandra Supreme and Tulsi Clarity. And as kefir veteran brand **Lifeway** ventures into plant-based probiotic drinks, the new Plantiful showcases adaptogens in Maca Coconut and Reishi Chocolate flavors.



Botanic chocolate bars from **Yes Cacao** brought organic, raw, wild-harvested cacao from Ecuador into three formulas, offering a range of benefit claims in “food you can feel.” Adaptogens like lions mane, maca, reishi, shilajit, and tulsi join other interesting botanicals with Ayurvedic influence like turmeric and nootropic bacopa, plus blue lotus flowers, GABA, and kava for relaxation. All three balance sweetness with a blend of sugar and natural alternative sweetener lucuma and display gluten-free, kosher, low-glycemic, non-GMO, and Vegan Verified label indicators.

**Host Defense** has expanded its line of functional mushroom supplements (capsules, extracts, and sprays) to include Primordial Chocolate, too. Four flavors (Dark Mint, Peruvian Pink Salt, Purely Dark, and Salted Maca Crunch) of 70% cacao bars all include chaga, cordyceps, lions mane, and reishi mushrooms and are all sweetened with coconut sugar. The bars are also vegan and certified organic, as well as packed in compostable materials.



# TEA TIME

In the ready-to-drink (RTD) space, tea beverages and herbal infusions had a strong showing at Expo West. SPINS researchers aren't surprised: tea drinks fit perfectly into evolving preferences for full flavor with less or no sugar, and many offer functional ingredients, as well. After a few days in Anaheim, our researchers felt well steeped in innovation from this year's class of RTD tea.

Well known black, green, oolong, and white teas all come from the *camellia sinensis* plant. One lesser known varietal is purple tea, which SPINS researchers have been watching since [last year's Summer Fancy Food Show](#). **Kabaki** brought one unsweetened variety as well as four sweeter



flavors to Expo East, making the new brew approachable to a range of consumers, with a pledge to donate 10% of profits to the communities in Kenya where it sources its purple tea. After launching late in 2017, **Purpose Tea** brought organic options to Expo West in four varieties: Lemon Bliss, Mint to Be, and Purple Reign (unflavored). Purpose Tea's social impact program focuses on women growers, with consumer purchases funding their ability to lease land where they cultivate purple tea and earn more for their crop. Loan repayments support a fund to extend opportunity to another grower, with the goal of helping smallholder farmers to own land and achieve financial independence.

**TEA RIOT** blends tea with cold-pressed juice, herbs, and other ingredients like coconut water and ginger. The organic beverages promote sustained energy from various forms of tea (black, green, matcha, and white), plus the nutrients of juiced fruits and veggies with no added sugars. Ranging from 60 to 100 calories, TEA RIOT drinks provide a midpoint between high-sugar juice drinks and unsweetened teas. As a kind of hybrid functional beverage, we like the brand's potential and especially enjoyed a preview taste of its newest flavor: Lemon Yerba Mate.



Tracking yerba mate with SPINS' **Functional Ingredient** attribute, our data shows continuous impressive growth over three years in the RTD space. Rising from a \$16.3 million annual market in 2015 to \$45.5 million in 2018, yerba mate is up 37.7% over three years.\*



Yerba mate is not from the *camellia sinensis* plant, but its leaves are steeped like a tea and praised for energy-giving caffeine content that can feel gentler than coffee. **Guayaki** has popularized yerba mate in the Natural Products Industry in both packaged and RTD aisles, but we were pleased to see another brand at Expo West produce fair-trade RTD yerba in four appealing flavors: Ginger Lime, Honey Mint, Lavender Lemon, and Orange Blossom. Sweetening its beverages with a blend of juice, sugar, and honey, **Busy Bee Yerba Mate** also partners with **The Xerces Society** to help protect pollinators as part of its commitment to healthy bee populations.

Grown from a tea-like bush native to South Africa, rooibos, too, gets the tea treatment in both packaged and RTD formats. In eye-catching, colorful cans, **BOS** positions RTD rooibos for a broad audience. The certified organic and Non-GMO Project Verified beverages come in five flavors: Berry, Lemon, Lime & Ginger, Peach, and Yuzu, and they fit into the lightly sweetened, mid-calorie range (70 calories per 12oz can).

In addition to yerba and rooibos drinks, our team found several exciting brands emerging with innovative infusions (from non-tea plants) for the RTD tea space with a wide range of functional benefit claims.

With primary marketing as a source of prebiotic fiber, **Rooting For You** teas bring big, buttery, nutty flavor from burdock root with zero calories or sweeteners. Along with burdock, chicory and dandelion roots join in the brand's #happybelly flavor, and chicory and ginger roots feature in #calmbelly.

**Shaka Tea** introduces mamaki, an herb from Hawaii, with regenerative abilities to fix nitrogen in the soil. The tea drinks have no added sugars and no caffeine, but the brand offers mamaki as a source of catechin antioxidants, exceeding the content of green tea five times over. With two zero-calorie varieties (Guava Gingerblossom and Lemon Lokelani Rose) and two mid-calorie options (Mango Hibiscus with 30 calories and Pineapple Mint with 70 calories), Shaka's drinks capture Hawaiian flavors well.



While we've seen a few packaged bamboo leaf teas, **IGZU** is the first to bring bamboo to RTD. Each bottle contains more than 35mg of silica, a plant-based alternative with similar benefits to animal-derived collagen for bone/joint and hair/skin/nails. Grown in the Caribbean, IGZU's bamboo brings revenue (and higher wages) to the community where it is farmed, helping to develop social and economic stability. Bamboo's sustainable growth factors into the appeal here, too. IGZU's bamboo is produced without any irrigation, fertilizer, or pesticides; converts greenhouse gases to oxygen; conserves both land and water; and is an extremely renewable resource as the fastest-growing plant on the planet. All three flavors (Elderflower Citrus, Hibiscus Blackberry, and Lavender Peach) are certified organic and lightly sweetened with just 10g of sugar.



# CLEAN ENERGY

Energy drinks with short, clean ingredient lists are growing in numbers, answering consumers' call for a wholesome boost with nothing artificial – and there's interesting overlap with the RTD tea set.

Made with black or green teas in Citrus Hibiscus, Pomito Lime, and Masala Chai flavors, **Zest Tea's** sparkling High Octane Teas offer 150mg of caffeine (comparable to coffee and three times as much as many teas, according to the brand), plus L-Theanine to reduce jitters, B-vitamins, and 5g of sugar per 12oz can. Marquis blends green tea, yerba mate, green coffee beans, fruit flavors, and stevia in its zero-calorie organic energy drinks, available in Citrus Yuzu, Mango Ginger, and Super Berry.

**Naturewise** Organic Ashwagandha Energy Drinks combine guayusa, matcha, rooibos, and white and black teas with the starring adaptogenic ingredient, as well as green coffee beans, fruit juice, and monk fruit for sweetness. All five flavors have just 60 calories per 12oz can and offer front-label marketing to enhance focus, reduce stress, and improve mood.

Amazonian guayusa figures centrally for **RUNA**, a brand we [featured after Expo East 2016](#). It has since shifted away from tea categories to focus its efforts on the energy drink segment, launching five new flavors at Expo West: lightly sweetened Mango, Pineapple, and Pomegranate, plus unsweetened Mint Strawberry and Watermelon. The brand's products are all certified organic and Fair Trade Certified, and RUNA itself is a Certified B Corporation. **MATI's** energy drinks blend guayusa tea with fruit juice and carbonation to create six pleasant flavors: Blueberry Pomegranate, Cherry, Citrus, Passionfruit, Peach Mango, and Tropical Pineapple.



## THE NEW FACES OF NATURAL SPORTS DRINKS



While the market for clean energy drinks is on the rise, so too do we see an influx of hydration and performance beverages to take the place of sugar-laden sports drinks. Several notable brands brought their A-game to the sports drink arena.

Known for maple syrups, vinegars, and maple-sweetened teas, **The Maple Guild** has launched **Tapt.** as a hydration and performance beverage, containing maple-tree water infused with antioxidants B-vitamins, electrolytes, and minerals. All seven flavors are certified organic: Blueberry, Citrus, Cranberry Pomegranate, Grapefruit, Peach, Raspberry, and Strawberry.

Also focusing on hydration, **ROAR Organic** Electrolyte Infusions feature coconut water concentrate, cane sugar, and sea salt in a proprietary blend, plus erythritol for sweetness, keeping calorie count down to 10 per serving and 20 per 18oz bottle). Certified organic, the drinks come in interesting flavors like Blueberry Acai, Cucumber Watermelon, Georgia Peach, Mango Clementine, Pineapple Mint, and Strawberry Coconut. **NOOMA's** Organic Electrolyte Drinks blend water with coconut water concentrate, fruit flavors, sea salt, and stevia. In 16.9oz Tetra Pak cartons, the drinks stand out on the shelf with bright colors and limited front-label messaging that includes their 30-calorie count with no sugar added. The beverages are available in four certified organic flavors: Blueberry Peach, Chocolate Mint, Mango, and Watermelon Lime.

**Kill Cliff** showed off two lines: Endure, made with slow-releasing carbohydrates from Palatinose, a proprietary sugar derived from beets, and a sparkling Clean Recovery and Hydration line, including green tea extract, ginseng, and B-vitamins, sweetened with erythritol and stevia. **TuMe** infuses water with a curcumin-turmeric extract, tying the ingredient to anti-inflammatory benefits among others, and it sweetens with 1g of sugar per bottle and stevia. The drinks come in flavors like Berries, Citrus, Coconut Water, Mango, and Pomegranate.

# WELLNESS SHOTS: ALIVE AND WELL

SPINS' Product Library has tracked this segment since 2015 – just a \$398.4 thousand annual market at the time – anticipating its growth and development. Now a \$373.5 million annual market, SPINS' proprietary **Functional Shot** attribute shows the most growth for shots marketed for cleansing/detox and immunity across food, beverage, and supplement categories.\*

At Expo West, our team saw countless new wellness shots. Many included ginger for digestion, such as the new launch of **Ginger Rescue** from veteran natural brand **The Ginger People**, adding coconut cream and apple juice, and blends under the name **Tulua** from the **Ginger Shots** brand. Tulua shots are certified organic as well as cold-pressed and high-pressure processed, in two flavors: Apple Cider Vinegar with Lemon & Ginger and Turmeric with Pineapple & Ginger.



**Vermont Village's** apple cider vinegar stood out with unique packaging: soft pouches in packs of 12. The individual shots contain a single ounce of raw and organic apple cider vinegar, flavored with honey and Blueberries, Cranberries, Ginger, or Turmeric, plus one pure vinegar Double Shot variety. All five contain the vinegar mother, and all are certified organic, kosher, and Non-GMO Project Verified.

## JUN IN MARCH

### (AND OTHER DEVELOPMENTS IN THE KOMBUCHA CATEGORY)

We expect to find a dizzying array of fizzy fermented beverages at Expo, but this year's stand-out products showed developments in packaging as well as new types of tea.



Jun, a lesser known fermented tea, is like kombucha in many regards, but the key difference is that the symbiotic culture of bacteria and yeast (SCOBY) is nourished primarily not by black tea but rather by green tea and honey in place of sugar. It's a delicate brew with a light, unique flavor, and **Wild Tonic** specializes in the stuff. Its lineup includes nine flavors of jun plus an additional five hard varieties with 5.6% alcohol by volume (ABV): Blueberry Basil, Hoppy Buzz, Mango Ginger, Raspberry Goji Rose, and Tropical Turmeric.

**SOMA** makes certified organic jun and kombucha as well as a proprietary brew called Rii, which uses a special culture nourished by tea, sugar, and specific minerals. The culture forms crystalline shapes, giving way to its name of Tibetan Crystals, and the brand adds shilajit to supply the minerals it requires. SOMA's Rii comes in three flavors: Flourish, a root brew with burdock, dandelion, and grape roots as well as ginger, nettle, sarsaparilla, and tulsii; Recharge, a fruitier grape-forward brew; and Evolve, a combination of jun, kombucha, and Rii, aged in oak.

Other kombucha brands are making the move into cans, including **Better Booch** and **Brew Dr. Kombucha**. With its relatively new kombucha line, **Suja's** already shaking things up with Mini Booch 4-packs of 8.5oz cans. We'll be watching to see if other companies follow suit on both trends: aluminum and multi-packs!



# BONE BROTH 2.0

SPINS tracks bone-broth sales with unique values of our **Product Type** attribute for frozen, refrigerated, shelf-stable storage. Combined, bone-broth products are booming, showing 83.4% growth year over year to a \$48.3 million market!\* But Expo West showed us a new trend in bone broth that we think will be the next wave for this hot topic.

**Bonafide Provisions** helped bone broth evolve from a standalone food into on-the-go nourishment with its Drinkable Veggies line, and its latest iteration features bone broth as an ingredient in delicious, hearty soups boasting an extra protein boost (totaling 8-22g per pouch) from the broth. In six flavors – Broccoli Cheddar, Butternut Squash, Chicken Vegetable, Creamy Mushroom, French Onion, and Tomato Basil – the new line is certified organic as well gluten-free, non-GMO, Paleo-friendly, and Whole 30 Approved.

**Pressery** adds convenience to the trend, incorporating bone broth in two of three new certified organic noodle cups: Shio Spicy Chicken and Shoyu Beef flavors. There's also a Miso Veggie flavor without bone broth. These new Ramen Kits feature whole-wheat noodles.

Likewise, **Osso Good** has expanded into a new line of Soup'r Foods with bone broth as an ingredient in three flavors: Butternut Squash, Thai Carrot, and Tomato Basil. This brand also adds an interesting gut-healing benefit claim to its collagen-rich bone broth and uses the tagline “Love Your Guts.”



## TURNING THE TABLES ON **TORTILLAS**

While the last few years have brought us brands like **Siete** and **Wrap**, whose respective almond/cassava flour tortillas and veggie-packed wraps introduced new elements into a somewhat staid set, tortillas still may not spring to mind as a hotbed of natural products innovation. Yet our team found two brands at Expo with highly differentiated products.

Nominated for a NEXTY, **EggLife's** wraps come in Italian, Original, and Rye flavors made from just water, egg whites, xanthan gum, and nisin (a food preservative produced from lactic acid bacteria with its own antibacterial properties). The new wraps tout 4g of protein and less than 1g of carbohydrates with front-label marketing as diabetic- and keto-friendly.

**Masienda**, on the other hand, is taking the tortilla back to basics. The brand sources corn from smallholder farmers – farms around five acres in size – in Mexico and the U.S. to produce artisanal tortillas in small batches. The tastes and textures set them apart from category peers, and the brand links great flavor to the fundamentals: environmental stewardship in agriculture to produce premium corn and minimal processing to follow traditional recipes. The three tortillas (Blue, Heirloom White, and Red) are also Non-GMO Project Verified. With a strong start in foodservice, Masienda is on track to make waves in retail, too.



# BABY FOOD FINDS

Two of our three picks for baby and kids come from a member of our team who's not only a natural products expert but also a father of two little ones himself!

**Tiny Human Food** cold-presses its certified organic fruit and veggie purees, aiming to preserve nutrient content that gets lost under higher heat. The look of the packaging is approachable and attractive, keeping it clean and simple, and the food comes in convenient 2-packs.

It's not hard to find puffed snacks positioned for toddlers...unless you'd like them to be grain-free. **Snapz** Little Huffs are unique in that regard, offering 100% cheese puffs that are gluten- and grain-free.



Another trend we're tracking is products that provide lactation support: we've seen a few new brands enter the market with bars, cookies, smoothies, and teas. One established brand, **Traditional Medicinals**, has expanded its Mother's Milk line to new Lemon Chews and Chocolate, Fruit & Nut bars – both containing the brand's proprietary herbal blend.

## SUPPLEMENT STARS

Another one of our 2018 Trend Predictions took shape on the show floor: we saw a much stronger focus on prebiotic fiber across categories at Expo West this year. SPINS data shows that prebiotic supplements are in decline right now, down 3.9% to \$129.0 million, but pre- and probiotic combinations are growing. These combination supplements represent a smaller share of sales than probiotics alone (a \$968.9 million market), but their growth is four times as fast: 17.3% to a \$127.5 million market.\*

As we watch the greater prebiotic trend, though, we'll continue to keep an eye on supplements, and we found two interesting examples at Expo West. **ProBiotein** powder is a blend of four fermented prebiotic fibers from organic wheat, oats, barley malt, flax meal, and nutritional yeast. The fermentation process, according to the brand, removes the starches and concentrates the ingredients' proteins while delivering four digestive enzymes and omega-3s at the same time. The brand sells the supplement powder as well as its own **MicroBiome Bar** in P-Nutty Cranberry and Razz-Apple Almond flavors. **MSPrebiotic** takes another approach to its supplement entirely, extracting a single resistant starch from potatoes to supply 7g of dietary fiber per 10g dose. Certain types of FODMAPs, another topic in this year's trend predictions, are sources of prebiotic fiber, so consumers eliminating FODMAPs may consume fewer prebiotics. MS Prebiotic is the first prebiotic product we've seen to carry the **FODMAP Friendly** certification.

Another supplement we loved came from **Amazing Grass**. While we've seen greens powders, electrolyte mixes, energy supplements, and hydration tablets before, Effervescent Greens tablets combine those functions together across its new line. Each tablet dissolves in water to yield a full serving of greens and veggies, plus 100% of the daily values for Vitamins B1, B2, C, and E. The new line has six tasty flavors: Berry and Lemon-Lime are two; Grape and Tropical are formulated for energy with an additional boost of caffeine from green tea extract; and Strawberry Lemonade and Watermelon Lime are formulated for hydration with added electrolytes.





# BEST OF **BODY CARE**

With nearly 50 years of history in natural body care, **ShiKai** still shows a strong ability to innovate, totally on-trend with a new line of CBD topicals. The body lotion, cream, and mentholated cream all contain a form of CBD that's both colorless and odorless. In an interview with New Hope Network from the show floor, owner Jason Sepp shared how the brand got started with CBD, its research on CBD's relief to inflamed joints and muscles, and where he thinks the ingredient is headed within the industry: [see the full interview here.](#)



As a small segment with burgeoning growth, CBD body care products grew 283.1% in sales year over year to an annual market of \$1.5 million with 100% of sales taking place in SPINS' proprietary Natural and Specialty Gourmet Channels.\*

Last year at Expo West, we met the Frau of **Frau Fowler** for the first time and highlighted her science-backed tooth powders. This year, Frau Fowler had lots of news. Besides a rebrand with bold hues and simplified design, sure to broaden the products' appeal at the shelf, the brand shared new eoBlends essential oils, eoFloss products, and Tooth Treats, as well as a new charcoal SKU among the tooth powders. The eoFloss in particular stands apart from its peers: as it moistens in the mouth, the fibers expand to clean more fully between the teeth. It's also coated in essential oils and xylitol. Among the Tooth Treats, which dissolve in the mouth with antibacterial effects and alkalinity promotion in-between brushing times, three of five SKUs are positioned cleverly for kids.

## **THE BUGS WE WANT** AROUND THE HOUSE

Conventional cleaners wipe out bacteria, and for years most of us thought this was the only way to keep things tidy, but SPINS is tracking a new trend in household cleaners: probiotics. At Expo West, we came across two more brands bringing the good bugs to balance out the bad ones.



**Counter Culture** uses organic ingredients like brown sugar, essential oils, and mineral powder with purified water, sea salt, and 13 probiotic cultures. The line includes all-purpose cleaners, hand soaps, and even fabric/air fresheners.

**Aunt Fannie's** takes a similar approach, advocating for a balanced microbiome and stating, "Microbiomic is the new natural." Cleaning vinegar sprays and wipes all received A-grades from the **Environmental Working Group**, and the line also includes kid-safe insect repellants and pest-control solutions.

# FOR **FURRY FRIENDS**

[SPINS tracks the pet industry](#) with an unparalleled eye for nuanced natural trends. Here we highlight a few of our top finds from Expo West specific to this sector.

New treats from **Portland Pet Food Company** touched on a few of our Trend Predictions for 2018: upcycled products and elevated indulgences for pets! The brand sources spent grain from local breweries then transforms it into scratch-made Pumpkin Brew Biscuits – with no alcohol or hops to harm your pup. The brand also prepares balanced, homestyle meals in both frozen bowls and shelf-stable pouches.

Limited-ingredient lines from **Buckley** and **I and Love and You** continue to advance the clean-label trend in the pet space. Buckley's new wet foods contain no gums (e.g., carrageenan, xanthan), call on kelp as a binder, and consist of 94% single-source meat. The brand launched new chewable hides called Smart Bars – the design looks a lot a wellness bar for pet parents! – which hold up to longer chewing but omit the chemicals that can make rawhides hard to digest. I and Love and You's new Lovingly Simple line is formulated for cats and dogs with sensitive stomachs, forgoing common allergens like beef and poultry in favor of salmon for cats, lamb and whitefish for dogs.



**Fidobiotics** and **Meowbiotics** supplements deliver pre- and probiotic blends and digestive enzymes, with specific formulas for

different-sized dogs and with specific health focuses for cats, such as hairball issues and urinary tract support. All ingredients are human-grade, and the brand prints a seal of its membership in the **National Animal Supplement Council** on the front of its labels.



**KIN Organics'** pet care brand, **Kin+Kind**, draws on the same high-quality, on-trend, organic ingredients that it uses for people. Luxurious cleansers and moisturizers for skin, insect repellants, and shampoos and conditioners soothe with aloe, argan oil, charcoal, clay, coconut oil, essential oils, jojoba, oatmeal, neem, and more, making grooming a spa day for Spot.

From gut health to pampering body care treatments, SPINS 2018 Trend Predictions for the pet space are looking very promising so far!

\*SPINSscan Natural and Specialty Gourmet (proprietary), SPINSscan Conventional Multi Outlet (powered by IRI), 52 Weeks End 2016-Feb-28, 52 Weeks End 2017-Feb-26, 52 Weeks End 2018-Feb-25.



# SPINS' review of Expo West 2018 features insights from:



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Join our webinar for even more insights and 20+ additional products!

**Wednesday, April 25 – 3:00 pm**

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## Want to learn more about the Natural and Specialty Products Industry **with SPINS?**

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