

# Small bites:

Big opportunities in the  
snacking market



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Beyond probiotics and prebiotics in pill format, many foods offer digestive health benefits that heal and seal the gut. Over the last few years, muesli, nutrition balls and protein bars have gained a poor reputation for containing artificial sweeteners, high levels of sugar, and soy protein isolate ingredients, not to mention the overdose of dates. New alternatives and ingredients with benefits for the gut present an opportunity to more fully develop the snacking category within the greater digestive health market.

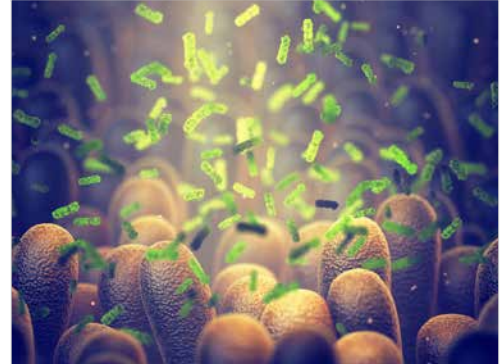
### 7 Plant-based snacking

There has been exponential growth in the vegan market, thanks to an increasingly health conscious outlook that's been embraced by some three million people across the United Kingdom alone. There has also been a significant rise in 'flexitarian' and plant-based eating habits, with a vast demographic of people taking deliberate strides to reduce meat and dairy consumption. Brands keeping up with changing dietary preferences have an opportunity to further develop plant-based snacks.

### 11 Snacks for the growing food allergy market

There is an ongoing and increasing demand for snacks for consumers with food allergies. The allergy consumer is a growing market that can be very loyal to a brand that understands and services their needs. If they find a product that is suitable for their dietary requirements, they are likely to purchase on a frequent basis. Some 20% of the global population suffer from food allergies and intolerances, offering untapped potential for snack manufacturers.

### 14 Takeaways for your business



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# Snack on this

**The festive season** is in the air, and this being a traditional time for plenty of eating, it seemed only fitting that we end the year with our food-focused snacking digital magazine.

Every day is a juggling act in today's crazy world, making finding the time to eat more challenging than it may seem. We're on the go from the second our alarm goes off in the morning until the moment our heads hit our pillows at night. Hardly anyone has the time for three sit-down meals per day, so it's unsurprising to see the snacking evolution replacing conventional eating habits.

Modern consumers are officially a population of grazers, with snacking no longer deemed a means to hold off hunger, but rather a preferred diet that people look to enjoy as meals of their own.

Globally, consumers are not meeting recommended fruit and vegetable intake, and the growing obesity crisis means that snacking brands play a vital role in helping people make healthier choices. For decades, snacks have been associated with unhealthy crisps, chocolates, sweets and biscuits. However, changing eating habits mean that today's snackers are actively seeking out healthier choices and nutritionally-loaded solutions.

There's a certain opportunity to meet the demand for healthy snacking options, but the expected influx of bite-size solutions may mean that shoppers become overwhelmed by choice. It's important for brands to guide consumers on where the provision of healthy snacks can be found and what nutritional advantages are delivered. Brands and retailers have an opportunity to educate shoppers on how to snack smart and optimise each of their bite-size meals throughout the day.

In this issue, we look into the growing opportunities within the snacking market, which include catering to a variety of dietary preferences and requirements. Digestive health remains a key market and area of interest for consumers; Lee Holmes outlines foods and formats for snacks that are good for the gut. Increasing shifts toward vegan and vegetarian diets are driving food brands to meet the demand for tasty and satisfying plant-based solutions, as Susan Gafsen highlights. Finally, we can't neglect the population of consumers who suffer from allergies and intolerances, presenting a opportunity for brands to secure loyal and long-term shoppers.



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# From the inside out

## Favoured foods for gut health

by Lee Holmes



**The gut truly** is the epicentre to human health. It's connected to the brain and immune system, and can affect the interplay of hormones, the nervous system and even quality of sleep and relaxation.

Our bodies are made up of around 100 trillion living organisms, with most residing in the gut, known as 'microflora.' The microflora is made up of both 'good' and 'bad' bacteria. 'Good' bacteria help the body produce hormones, train the immune system, regulate toxins that are ingested, help control metabolism, and absorb nutrients. A disgruntled gut and the 'bad' microflora it houses can increase susceptibility to a range of conditions such as irritable bowel disease, constipation, obesity, anxiety and depression, inflammation, and metabolic conditions like insulin resistance. That's why looking after the gut and supporting the growth of 'good' microflora has never been more important.



### Good for the gut

Ensuring adequate hydration, enjoying easy-to-digest recipes and eliminating any foods that cause inflammation or digestive symptoms is the first step toward healing the gut. Think stocks, soups, stews, curries, smoothies and juices. Eating slow cooked foods and blended foods that are pre-digested enables the body to absorb the nutrients and digest them correctly—helping to heal and seal the gut.

Another way to look after the gut is to give it some time to rest. As a result of instant, processed foods and chemically driven choices, most people's digestive systems are over-burdened and confused. By consuming slow-cooked foods and adding healing spices, such as turmeric and ginger, the body can rest and digest whilst still healing and sealing the lining of the gut to improve nutrient absorption.

Using bone broth or veggie broths as a meal base delivers key minerals and ingredients such as gelatine, which are as nourishing for the insides as the outsides.

Root vegetables such as parsnips, carrots and sweet potatoes are naturally gluten-free, rich in prebiotic fibre and provide a load of beneficial nutrients. Plus, they have a low glycaemic index which

means they won't induce inflammation or digestive issues. The prebiotic fibres in these vegetables help to maintain a healthy community of bacteria in the gut and can ease digestion.

### Foods that seal the deal

There are many great foods that can heal the gut. First up is bone broth. Broths contain a protein called collagen—well known for its bone, joint and skin benefits. Collagen is in every bone, skin, blood vessel and tendon in the body, and helps maintain the integrity of tissues, and the elasticity of skin, and tightens the digestive tract. Once collagen is cooked, it turns into gelatin which helps to prevent damage to the intestines and improve the lining of the digestive tract.



Next up is turmeric. The active constituent within turmeric, known as curcumin, is an anti-inflammatory ingredient which helps to soothe the gut lining. Turmeric is also an antioxidant, helping reduce oxidation at a cellular level. There are also plenty of other delicious, gut-healing spices. Ginger, for example, is high in both anti-inflammatory and antioxidant properties. Other anti-inflammatory herbs to spice things up include cinnamon, cumin, parsley and basil.

### Probiotics

Once the digestive tract is healed and sealed with collagen and anti-inflammatory ingredients, it's time to introduce probiotics. Probiotics are high in anti-bacterial properties, which help to grow friendly bacteria in the gut. While this is useful for everyone, probiotics can also help get the gut back into tip-top shape after antibiotics and reduce antibiotic-related diarrhoea and constipation. Some the popular ways to introduce probiotics in food form include sauerkraut, kimchi, kombucha and yoghurt.



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Probiotics are necessary for promoting the growth of 'good' bacteria in the gut, but their effects are bolstered by their partner, prebiotics. Prebiotics are fibre-rich foods that help grow beneficial bacteria in the gut and help to rebuild intestinal walls. Prebiotics act as a natural 'fertiliser,' helping fuel, feed and nourish probiotics in the system. Foods rich in prebiotic fibre include dandelion greens, onion, garlic, artichoke and root vegetables.

### Snacking for gut health

As interest in gut health grows, people are looking for more food options to contribute to their digestive health. Snacking is a key component. It's a category many manufacturers find easier to develop products for, and retailers enjoy the high turnover and impulse nature of snack stock. The real drive for gut-healthy snacks, of course, comes from consumer demand. People love the convenience of snacks and if they can combine that with gut health benefits at the same time, it's a marriage made in sales heaven.

More gut health snacks are appearing on shelf and in the fridge. Think probiotic and prebiotic treats, fortified snacks, gummy bears, and small portion kefir. On the chilled side of things, gut health options include on-the-go yoghurts, kefir, and probiotic ice creams and ice blocks.

Over the last few years, muesli, nutrition balls and protein bars have gained a poor reputation for containing artificial sweeteners, high levels of sugar, and soy protein isolate ingredients, not to mention the overdose of dates. Some new sugar alternatives being used include monk fruit, pomegranate syrup, coconut syrup and tapioca syrup.

While there are some gut healthy snacks out there, there seems a big opportunity to more fully develop this category with more options, flavours and portions. ●

*Lee Holmes, holistic food and nutrition coach, is founder of Supercharged Foods. She is also a certified health and wellness coach, as well as wholefoods chef. After being diagnosed with an autoimmune disease, Holmes wanted to provide information about living healthily without gluten, dairy, sugar, wheat and yeast in favour of wholesome, nutritional. She has published a range of books containing simple recipes, and has her own line of 'Supercharge Your Gut' products.*



# The future of snacking

## Where is the opportunity for plant-based snacks?

by Susan Gafsen

**Over the last few years**, there has been exponential growth in the vegan market, thanks to an increasingly health conscious outlook that's been embraced by some 3 million people across the United Kingdom alone. There has also been a significant rise in 'flexitarian' and plant-based eating habits, with a vast demographic of people taking deliberate strides to either reduce or curtail meat and dairy consumption.

There are many reasons why a plant-based mindset has been so proactively adopted.

Social media platforms have played influential roles, with many celebrities, like Leonardo DiCaprio and Natalie Portman, trumpeting the positive impact that a vegan diet can have on health for people and the planet.

### The shift towards plants

Stats and data suggest that current eating habits are simply not sustainable or environmentally appropriate moving forward. As such, it is responsible to rethink and address eating habits, which have been deemed so impactful that the World Wide Fund for Nature (WWF) has listed a sustainable diet as one of the top four changes a person can make to reduce their environmental footprint.

Younger generations are leading the charge. A survey conducted by UK grocery retailer Waitrose found that one in four under 30-year-olds are vegetarian or have significantly reduced their meat intake.<sup>1</sup>

For the middle-aged and beyond, health issues arising with age is also playing a central role nurturing these fast-evolving eating habits. Today more people than ever before are aware of the unequivocal health benefits of reducing consumption of red meat and dairy, and how this offsets blood circulation and heart health conditions, for example.

### Rise in snackification

Alongside this significant switch to plant-based diets is the growing 'snackification' trend in the UK. For many years, snack offerings were limited to chocolates, sugar-infused treats and oily crisps. The lack of healthy and tasty snacks could arguably contribute to rising levels of



global obesity, which is especially prevalent amongst the population of young people living sedentary lifestyles. According to the House of Commons Library's paper on Obesity Statistics in the UK, published in August 2019, approximately 30% of the adult population is deemed clinically obese. Collectively, sugary snack brands need to reduce sugar and explore alternative sweeteners for finished products.

Regardless of diet type, it's universally known that smaller meals throughout the day are healthier than three large meals. It can be challenging for plant-based eaters, and even more so for those with unavoidable dietary restrictions like gluten-free, to find multiple meal solutions. Not only do these eating populations struggle to find tasty meals, but they also have to be mindful of supplementing recommended protein and nutrition daily intake that they don't get from animal sources.



### Influential lifestyle

Trying to fit in work, parenting, and exercise in a single working day continually proves to be a challenge—never mind trying to find the time to eat and actually enjoy food!

This is where snacks come to the fore to shift consumers away from eating fewer large meals and toward frequent small meals. The shift to snacking has occurred alongside a rise in 'healthier snacking,' with consumers seeking to replace meals with snacks that are nutrient-rich, satisfying, and support a greater balanced diet.



According to a Mordor Intelligence 2019 report,<sup>2</sup> the healthy snacking bar market is now worth £365m and is forecasted to grow at a CAGR of 5.95% during the forecast period of 2019-2024. With this rise, it's unsurprising to learn that there is an abundance of intriguing new brands competing for shelf space and consumer attention.

For many years, CPG giants have led the snacking market and controversy has reared its head time and again to question health claims displayed on packaging. Today, the ever-present spectre of obesity and the government's increasingly 'nanny state' initiatives (advocating a ban on eating on public transport and the extension of sugar tax), means consumers are quickly having to reassess their daily eating repertoires. Shoppers are increasingly discerning and inquisitive, actively scrolling through 'back of pack' nutritional decks to verify that the products' nutritional claims are as healthy as they are purport to be.



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Today there's also a growing realisation that 'fat' is not the enemy we once thought. The right fats are not only good for you but keep hunger pangs at bay. It's refined sugars and saturated fats that need tackling to stay on top of the fight against obesity.

Various start-ups have tapped into the demand and market opportunity for healthy snacks. To their advantage, start-ups have the agility to respond to new trends, such as gluten free, plant-based, gut health, low sugar and high fibre, as they are not hampered by huge set-up implications of changing tack.

### Plant-based potential

Of the 10 emerging brands that PepsiCo invested in in 2018, four of these were in the snack category and all of these were plant-based.

The real challenge for the plant-based or vegan snacker is finding high protein snacks that are not loaded with sugar, salt, filler grains or saturated fats. So many of today's protein bars and balls use dates (high fructose), whilst a lion's share of our favourite crisp alternatives remain deep-fried.

For vegans, there is a proliferation of brands, such as Vego, Doisy & Dam, Ombar, LoveRaw and Montezuma, that have launched non-dairy chocolate alternatives, as many people miss chocolate and cheese when they switch to a vegan lifestyle.

### Hurdles to health

The challenge for tomorrow's brands is to produce plant-based, healthy snacks that are tasty, competitively priced, and economically savvy. Too many of the dehydrated and low sugar and salt options that have filled our snacking aisles continue to underwhelm. By definition, healthy snacks are likely to be more expensive as they include premium tier ingredients. Additionally, these operations might well consider adopting small batch strategies that will once again be reflected in higher manufacturing costs. Healthy snacks are also likely to have a shorter shelf life since they may not include salt or other additives and preservatives.

For those brands that can tick the health and taste boxes, there is a real opportunity to make a good impression in today's increasingly health-conscious marketplace. Parents invested in their child's health are finding themselves attracted to low sugar and no added sugar options. Rising education around addiction to sugar starting at a young age has given way to a meteoric shift regarding how many young parents educate toddlers about appreciating and enjoying foods that are not loaded with saturated fats and refined sugars.



There's an opportunity for start-ups to move away from predictable, fruit-based treats for kids and offer savoury alternatives or treats that appeal to young, curious taste buds.

When it comes to vegan and plant-based snacks, there is a certain responsibility for brands to consider the sustainability of their packaging. Plastic is the notorious go-to as snacks are by definition 'grab and go' and single use. Start-ups and young brands are in many ways ahead of their peers in leading change by offering their snacks in sustainable packaging, like compostable and recyclable options. The longer-term challenge for start-ups revolves around the fact that these more 'environmentally-friendly' options are expensive and it will ultimately take pressure from big brands and supermarkets to force packaging companies to adopt meaningful and cost-effective innovation. ●

*Susan Gafsen is co-founder of Pep & Lekker, which sells award-winning vegan, gluten-free snacks that are high in protein and low in sugar with no added sugars, additives or preservatives. Seed snacks are also high in fibre and free of the top 14 allergens. They are sold in 30g fully compostable pouches. Seed snacks are available on Ocado, Planet Organic, As Nature Intended and also online via the Pep & Lekker website.*

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# Dietary requirements?

## Snacks for the growing food allergy market

by Jacqui Peake



**There is an ongoing** and increasing demand for snacks for consumers with food allergies. It is very difficult for those who have a food allergy to have confidence that they will be able to find suitable food and drink when they are out and on the go.

### Why we need change

Starting in October 2021, allergen laws will be enforced that ensure product labels on all food PPDS (Pre-Prepared for Direct Sale) include ingredients and all allergens clearly identified under Natasha's Law. Following the tragic death of Natasha Ednam-Laperouse, who suffered an anaphylactic reaction to hidden ingredients, her family has fought tirelessly to ensure no other family will suffer a similar fate. Yet there continue to be other tragic allergy-related deaths reported in the media.

It is therefore understandable that those with severe allergies are extremely cautious when eating out or buying meals. As a precaution, allergy-sufferers will naturally pack emergency snacks in their bag in case their needs can't be catered for at a restaurant or shop. If a consumer has a severe allergy, they will naturally be cautious; if they have no confidence in the food available in shops or restaurants, they will have substitutes in the form of snacks to fill the gap. Many allergy sufferers will pack snacks in their suitcase if they go on holiday as there is often little certainty in how well a destination can cater for their needs.

### Rising allergy cases

Recent reports have confirmed an alarming increase in the number of children treated in hospitals for anaphylactic shock. A recent BBC report revealed that from 2013 to 2014, 1,105 children were treated; from 2018 to 2019, this number increased to 1,746. Teenagers treated for allergies has increased by 65% in five years. There are many possible reasons for this, including improved diagnosis, changes in eating habits and diets on a frequent basis, increasing use of ready meals and additives within meals. According to a 2018 study,<sup>1</sup> young adults between the ages of 15 and 24 years are known to be highest at risk of anaphylactic reactions.





## Student population

Students and teenagers away from home are a particularly vulnerable group because of their likeliness to be experiencing being away from home for the first time, learning to cook for themselves, fitting into new friendship groups, as well as visiting new and unfamiliar restaurants, shops or surroundings. During this age period, they are prone risk-takers, adventurous with trying new foods, and often neglect their medication. Lifestyle as a student naturally means that their diet may not be considered healthy. Focusing on the late teen and student population group poses an interesting opportunity for brands to provide healthy and allergen-free solutions.

## Where does the potential lie?

There is a certain opportunity for snack manufacturers interested in offering healthy snack alternatives that are largely allergen-friendly. The current popularity of protein

snacks has seen a rise in nut energy bars and balls, which creates a concern for those with even mild nut allergies. A person with a severe nut allergy can react if nut products are simply opened in their vicinity. Growing interest in vegan and plant-based diets has given a boost to the use of pea protein, which is part of the legume family. Peanut allergy sufferers are often susceptible to allergies to other legumes, such as peas, lentils and chick peas. For manufacturers, it is vital that all ingredients are clearly identified in all snacks, as well as possible traces of certain food groups that may be present through the manufacturing process.

Although nuts are instantly recognised as the cause of severe anaphylactic reactions, many of the recent media cases have been deaths as a result of a milk allergy. Milk is a common ingredient in many dishes, increasing the risk of cross contamination, and it can easily be overlooked as a serious allergy.



There is commercial potential for manufacturers looking to explore new types of snacks that are free from as many allergens as possible. When it comes to labelling, all ingredients and claims should be clearly visible.

Brands are encouraged to avoid 'May contain' precautionary statements where possible as this often results in the consumer avoiding the product entirely due to worry of risk. If possible, add further information such as, 'This product does not contain nuts, however other products within our factory contain nuts.' Strict



processes should be in place to avoid cross-contamination; however, a small risk is always possible in factories processing multiple food and product types. A blanket statement of 'May contain peanuts, nuts, sesame seeds, sulphites' will only cause doubt and create concerns. The consumer is likely to avoid such products altogether.

The allergy consumer is a growing market that can be very loyal to a brand that understands and services their needs. If they find a product that is suitable for their dietary requirements, they are likely to purchase on a frequent basis. Allergy consumers are also very active on social media, which could work for or against brands. A large opportunity presents itself, which is sure to deliver commercial prizes when done right. ●

*Jacqui McPeake has worked for over 30 years in the catering industry. Through her daughter's own food allergies, Jacqui has developed an interest and passion for improving awareness and understanding of allergens. She ensures that her team is at the forefront of leading best practice in universities for allergen management and has led her team to win the Cost Sector Team of the Year 2017 for their work on allergen management and improving the free-from offers for students with food allergies. Jacqui was awarded the 'Free-from Hero Award 2018' and now runs her own business as an allergen and catering specialist (JACS Ltd).*

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# Takeaways for your business

**M** **Modern lifestyle has changed** the eating habits of consumers globally, with many people opting for smaller, frequent meals throughout the day. The snacking market has an opportunity to fill meal gaps with healthy and nutritional solutions that also cater to the demand for a variety of solutions that meet dietary preferences. According to a Mordor Intelligence 2019 report, the healthy snacking bar market is now worth £365m and is forecasted to grow at a CAGR of 5.95% during the forecast period of 2019-2024.

Driven by health and environmental concerns, more and more consumers are choosing plant-based diets—ranging from cutting down on general meat intake through to strictly vegan eating. Driving the charge are teenagers and young adults. As the future purchasing population, it's essential that companies keep their eyes on the rapidly changing habits of younger generations. Mass movements toward plant-based diets have driven consumer demand for tasty and nutritionally-loaded snacks. There is a certain opportunity for brands looking to offer snacks that push past carrot sticks and potato crisps for vegetarians and vegans. Corporate giants interested in niche snacking are increasingly seeing the mutual benefits of partnering with SME companies and start-ups which have the agility to keep up with current trends and accelerate products to market quickly.

Product developers often turn to nuts, legumes and grains as ingredient alternatives—especially for plant-based consumers—but these are not an option for the 20% of the population that suffer from a form of food allergy. Recent reports have revealed that diagnosis of food allergies and intolerances increase year-on-year. There is a certain opportunity for snack manufacturers interested in offering healthy snack alternatives that are largely allergen-friendly. The current popularity of protein snacks has seen a rise in nut energy bars and balls, which creates a concern for those with even mild nut allergies. Restricted by choice, the loyal purchasing behaviour of allergy-sufferers is worth considering for companies looking for a unique position in the market.

Beyond eating patterns, interest in gut health continues to grow as people continue to find more food options that contribute to digestive health. Functional snacks have the potential to help consumers meet their daily digestive health goals. Probiotic and prebiotic food products are already retailing in the forms of yoghurts, cheeses, snack bars and fortified beverages. However, the consumer demand for unprocessed and natural foods could revive soups, stocks, stews and smoothies that champion foods with probiotic and prebiotic properties.

The snacking market is a booming category, loaded with commercial potential, for which many manufacturers find easier to develop products, and retailers enjoy the high turnover and impulse nature of snack stock. ●

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