



NEW MARKET TRENDS IN FROZEN FOOD

The innovation of frozen breaded products is based first and foremost on the promise of pleasure, implying a game of textures, flavors or new and gourmand shapes.



However, one can still see that the development of frozen breaded products mixes pleasure and health, the challenge of the manufacturer being that of finding the perfect balance between these two promises. Too much health reduces the pleasure of consuming, and innovating frozen products exceeds what it originally used to be.

WHAT DO CONSUMERS EXPECT?

As far as pleasure is concerned, the most remarkable innovations are linked to the promise of the exotic. Discovering new coatings resulting from distant cuisines, such as the panko breading from the Japanese cuisine, has led to many innovations (fish, chicken, etc.) being launched on the European market. Many of these have a common denominator: the special know-how. The panko is made using bread cooked passing an electric current

through the dough, for obtaining bread without a crust. The exotic part can be exacerbated using flavored panko breading, with an "Asian" recipe, such as soy, honey and ginger coating.

The food pleasure consists of bringing something original, new in front of the consumer. Routine diminishes the pleasure, especially when referring to food, and prevents the manufacturers from bringing the appreciated novelty. The new sensations can be brought to the consumer by means of texture. Different breadings with different textures allow to expand the range of sensations brought forth by a food product. Various brands of seafood products have brought Alaska hake fillets with very crusty coatings, of the "fish & chips" type or the "burger" type. Another innovation remarked in Italy consists of a crusty breading made of puffed rice, bringing an entirely innovating texture on the market of frozen products. This innovation brings a double

benefit for the consumer: a new texture and a new association to a gourmet "fast-food" product, two powerful benefits for justifying a renewed pleasure positioning.

THE HEALTH FACTOR

A new lever of innovation for sensorial pleasure through variety consists of integrating textured elements in the coating, in order to introduce delicacy (through taste and texture) which are also functional (if the inclusion naturally brings a benefit for health, such as the flax seeds which naturally bring omega 3). XTC has spotted on the German market Alaska saithe fillets with a breading of sunflower and pumpkin seeds. This new lever of innovation brings a complexity to the simple breading allowing an association of new ingredients, with infinite possibilities of innovations (spices, flavors, seeds, herbs, inclusions of cereals, inclusions of vegetables etc.) In Spain, chicken parts with spicy breading equally underline the action of including ingredients in the coating, in order to bring a new benefits to the consumer, as far as a more intense flavor is concerned, compared to the standard one. The spicy inclusions refer to white pepper, nutmeg, black pepper, dill and paprika. A product noticed on the Mexican market is even more original and consists of a mixture of sweet and salty: fish fillets with a coconut breading, 100% natural.

HOW DISRUPTIVE SHOULD INNOVATION BE?

Suggesting new breaded recipes is a powerful innovation lever because it is disruptive, involving products which have "never been seen before", but it also implies taking a more important risk for the manufacturers. The question is: should producers innovate incrementally, using low risk innovations, which do not con-

vince the consumer on the long term, or should they innovate disruptively, hoping to meet to an expectation which hasn't been met before and to introduce a sustainable new frozen product on the market? It is up to the manufacturers to define their innovation strategy, using a two speed approach: an incremental innovation strategy lacking regular innovations and therefore presenting low risks, or an abrupt innovation strategy, taking higher risks and a stronger frequency, hoping to mark a market as sustainable. This way, in The Netherlands we can see, as far as the disruptive strategy for breaded frozen products are concerned, the launch of breaded lupine croquettes. The bet is to respond to the trend of "semi-vegetarianism" (reduction of the consumption of animal protein in favor of the vegetable protein) playing the card of delicacy. In France, we have been able to see frozen breaded stuffed olives. In the United Kingdom, XTC has identified breaded whole langoustines. Finally, in Switzerland, we have seen breaded jalapeno peppers, stuffed with fresh cheese and in Japan, the surimi breaded with algae in order to bring an extra iodized flavor. These experiments prove



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the will of the manufacturers of taking more important risks in order to suggest innovations which, in the long run, may claim a strategic position for the companies in question.

THE FREE-FROM TREND REMAINS DYNAMIC

The gluten-free breaded products are a segment which is equally dynamic. The recipe that guarantees their success is simple: the product must bring a functionality (gluten-free) and fulfill the promise of pleasure (a good, flavored product, as close as possible, as far as taste is concerned, to the standard reference) at the same time. The target consuming gluten-free products is mostly made of people who don't have a medical condition, who don't suffer from the celiac syndrome. These consumers want to diminish their

gluten consumption for personal reasons, and, due to this fact, the presence or absence of gluten is not a critical factor. If the product loses its flavor and/or texture in order to guarantee the absence of gluten, it will be depreciated by the consumer, who might even prefer the standard reference, with gluten, which offers instead the guarantee of an intact pleasure of consumption. The balance between the benefit of pleasure/absence of gluten must be observed when we innovate on gluten-free recipes, for non-medical targets. Another good example consists of flavoring the gluten-free breaded, such as rice and corn flour breaded flavored with tomatoes and oregano. You must remember that a healthy benefit does not mean diminishing the pleasure of consumption, but quite the contrary. ■