Food product innovations with grain legumes: which products for which markets?
Global overview from MINTEL-GNPD 2010-2019 data

Marie-Benoît MAGRINI, Tristan SALORD
UMR AGIR, INRAE-Occitanie Toulouse, France

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➢ Very low legumes consumption in Europe, as many other countries: 4 kg/year/pers. Europe (see Weindel et al., 2020)

➢ Consensus for increasing such consumption for healthy and sustainable diets: from 11 kg/year/pers. for Europe in 2050 (see Poux and Aubert, 2018) to 18 k/year/pers. (Weindel et al. 2019)

➢ But technological lock-in is still strong, reducing legume uses (see Magrini et al., 2018, 2019)

Example:
Most frequent protein ingredients in Meat Substitutes market;
MINTEL-GNPD data, global scale 2000-2016
From RADOBANK 2017 study

Few food product innovations with pulses compared with major crops
➢ To give a **first deep analysis** of the food product innovations with legumes launched on markets

➢ **Available for all**, especially small and medium firms that do not have sufficient financial resources to get such data analysis (market information asymmetries)

➢ **Available for public policies**, to identify « motor » markets to be fostered as drivers of the relaunch of legumes in food, particularly for pulses (ie. to reverse technological lock-in).

**Which are those motor markets ?**

➢ Do these food product innovations with legumes contribute to healthy and sustainable diet expectations ?

➢ Do the legume species more and more used are the ones progressing in cultivation to secure supply chains ?

➢ Which co-evolution with scientific advancement in Food Science and Technology ?
MINTEL-GNPD dataset
A shopper networks in more than 80 countries to track food product innovation launched on markets

5 types of Food product innovation for each firm
New product/ Range extension/ Reformulation / Repackaging / Relaunch
Market segments
Claims on the packaging

Retrieval of date at global scale
Over 2010-2019

Focus on UE28

Use of natural langage processing (N.L.P) methods to unpack ingredients lists

Over the decade
5 millions of food product innovations in the world + 500 000 contain wheat
Main Results – World Scale

Food innovations containing soy are more numerous than with legumes, even in Europe.
➢ First type of product innovations is **RANGE EXTENSION** ⇒ choice of security?
➢ More « new » than « renew » a young dynamic market
Meat substitutes market segment little invested by pulses.

« Tofu » is part of the « meat substitutes »
• Europe driven by a dynamic of innovation based on sustainability/environmental and healthy issues.

• Environmental dimension is more marked for pulses.
Main Results – UE28 Scale
A strong growth of chickpeas and lentils, with their identity as a basic ingredient asserting itself, while peas remain more in a functional ingredient logic.
• Use of fractions or pulses extracts remains minor.
• **Deepen caracterisation of innovatives markets concerning pulses**: compute nutriscore/processing score to help support desirable forms of innovation for sustainability and health,

• « **Routinise** » parsing methods used and constituted ontologies,

• **Make a focus on innovations products concerning « bakery, pastery & confectionery »**, it’s also a trending topic in FS&T(Food Sciences &Technology),

• **Analyse sciences/markets co-evolution/Identify innovatives ecosystems** (clusters) based on the identification of firms carrying these innovations.