

presentation

Latest Trends in Functional Mushrooms

2023

What will be covered



Consumer approach to healthy eating



Mushroom ingredients in NPD



Functional F&B with mushrooms

Notes: NPD = new product development, F&B = food & beverage

About Innova Market Insights

We look for connections from different perspectives using our Insights 360 approach.

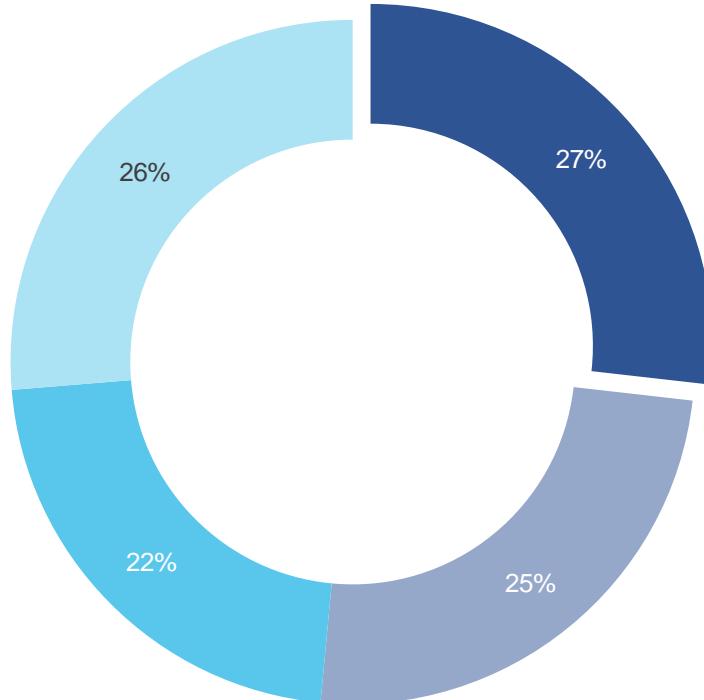
Powered by intelligence available on the Innova Platform:

- Databases
- Dashboards
- Reports

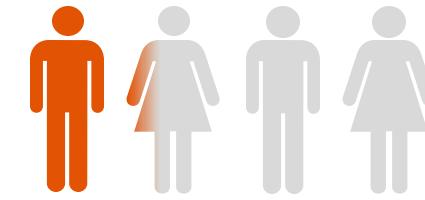


Mushrooms as part of the functional approach to healthy eating

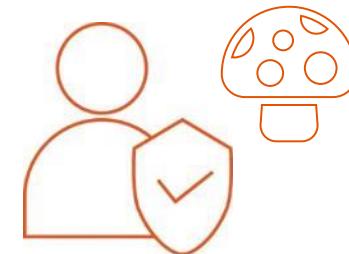
Figure 1 | How would you categorize your predominant approach to healthy eating? (Average: 11 countries) (2022)



- I choose products that positively boost my nutrition or benefit how my body functions (e.g., high in protein, superfoods).
- I try to limit or reduce products/ingredients that are bad for me (e.g., high in fat, sugar, salt).
- I choose natural foods for their inherent nutrition (e.g., fruit, vegetables, nuts).
- I choose natural products to avoid additives and preservatives as much as possible.



More than
1 in 4
consumers globally are interested
in **functional mushrooms/active
mushrooms** as functional
ingredients.



Source: Innova Health & Nutrition Survey 2022 & 2023 (Global: average of Brazil, Canada, China, France, Germany, India, Indonesia, Spain, Mexico, UK, US)

Consumers see functionality as an added value

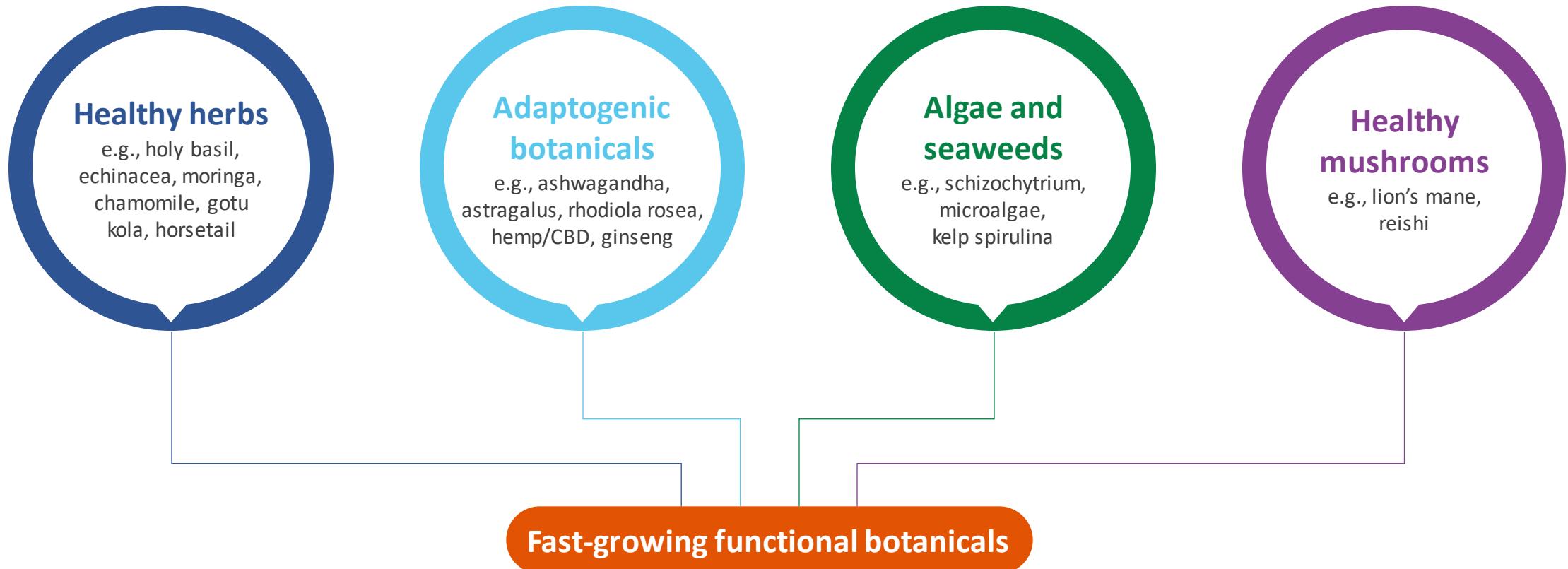
Figure 2 | Considering food and drink, which product features do you think are worth paying more for? (Top responses) (Average: 11 countries) (2023)



Source: Innova Lifestyle & Attitudes Survey 2023 (Global: average of Brazil, Canada, China, France, Germany, India, Indonesia, Spain, Mexico, UK, US)

All-things “plant” continuing trend, with health as a key driver

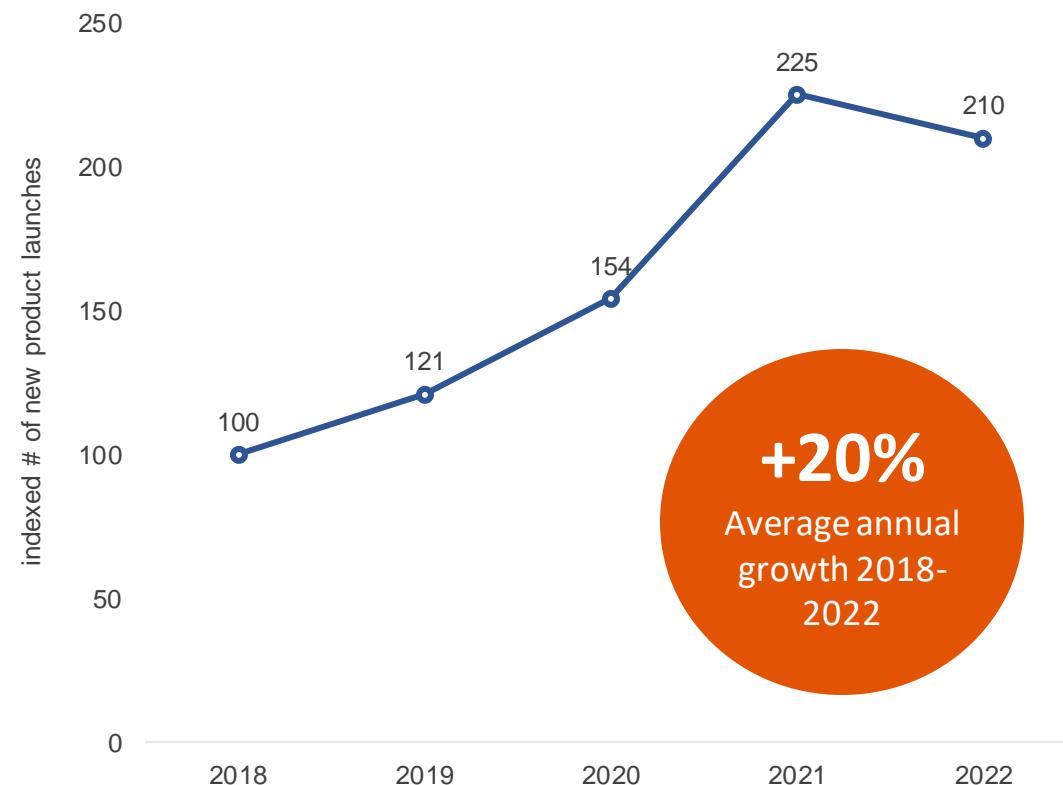
- Health is still the #1 factor behind plant-based eating decisions. Looking specifically at fast-growing ingredients classified on the Innova Database as nutraceutical and functional ingredients, it is evident that “**healthy mushrooms**” is one of the four distinct areas of growth within more specifically functional botanicals at present.



Source: Innova Market Insights

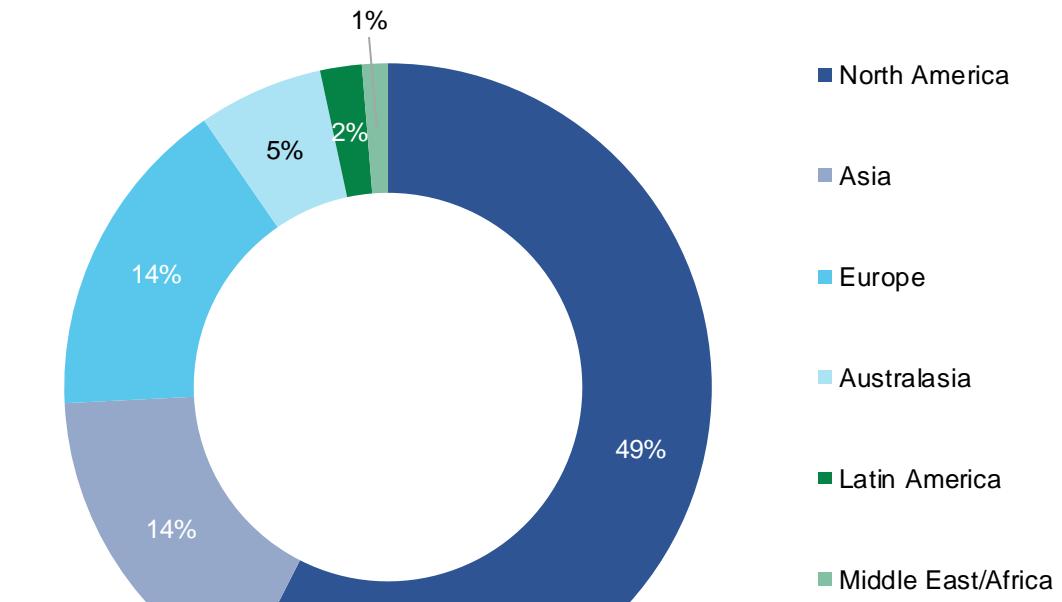
NPD launches with mushroom as an ingredient are on the rise globally

Figure 3 | Indexed number of new functional F&B launches tracked with mushroom as an ingredient (Global, index 2018=100)



North America leads the way with nearly 49% of launches

Figure 4 | Top region as a % of new functional F&B launches tracked with mushroom as an ingredient (Global, 2018-2022)



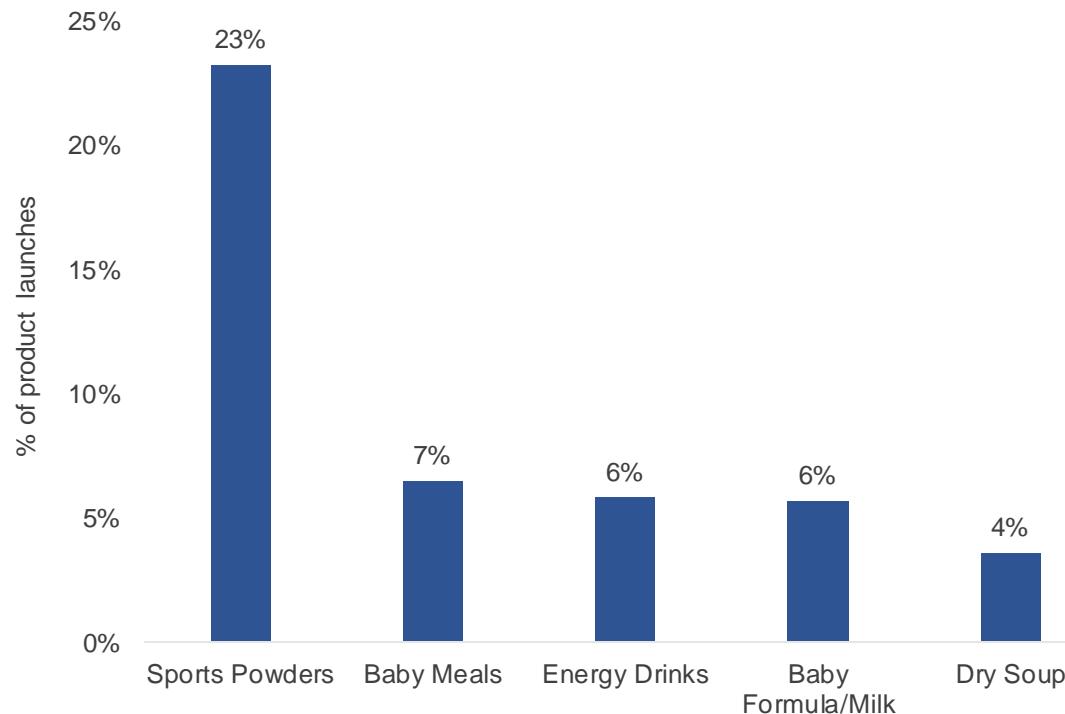
Source: Innova Database

Note: Global data excludes Russia and South Africa.

Sports powders sees the top application, fast-growing in energy drinks

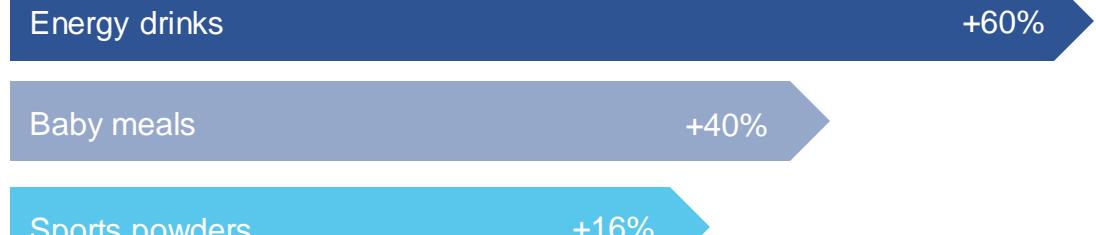
Mushroom ingredients mainly found in sports powders

Figure 5 | Top subcategories as a % of new functional F&B launches tracked with mushroom as an ingredient tracked (Global, 2018-2022)



Energy drinks and baby meals are picking up pace

Figure 6 | Fastest growing subcategories* of new functional F&B with mushroom as an ingredient tracked (Global, CAGR 2018-2022)



Kos Organic Plant Protein Powder with Chocolate Peanut Butter Flavor

United States, May 2023

All-in-one protein shake, **multivitamin, and immune support**. Use as a meal replacement option 1 to 2 times a day for **healthy weight management**.

Contains shiitake mushroom

Source: Innova Database

Note: *Subcategories with less than 5 launches in 2018 are excluded. Global data excludes Russia and South Africa.

Spotlight on fastest growing subcategories with mushroom ingredients

Energy drinks



Contains: Agaricus mushroom extract

Savg Energy Grapefruit and Apple Energy Drink

Portugal, Mar 2023

Energy drink with natural juices and antioxidants. Low calories. Only high-grade primarily natural ingredients were used.

Baby meals



Contains: Enoki mushrooms, shimeji mushrooms

Matsuya Rice Porridge with Ripe Tomatoes and Mushrooms For Babies From 6 Months

Hong Kong (China), May 2023

Niigata Koshihikari rice is used. **Contains DHA and calcium.** No preservatives added. 28 allergens free.

Sports powders



Contains: Organic mushroom blend: maitake mushroom, reishi mushroom, king trumpet mushroom, shiitake mushroom and lion's mane mushroom.

Glaxon Super Greens Powder with Pink Lady Apple Flavor

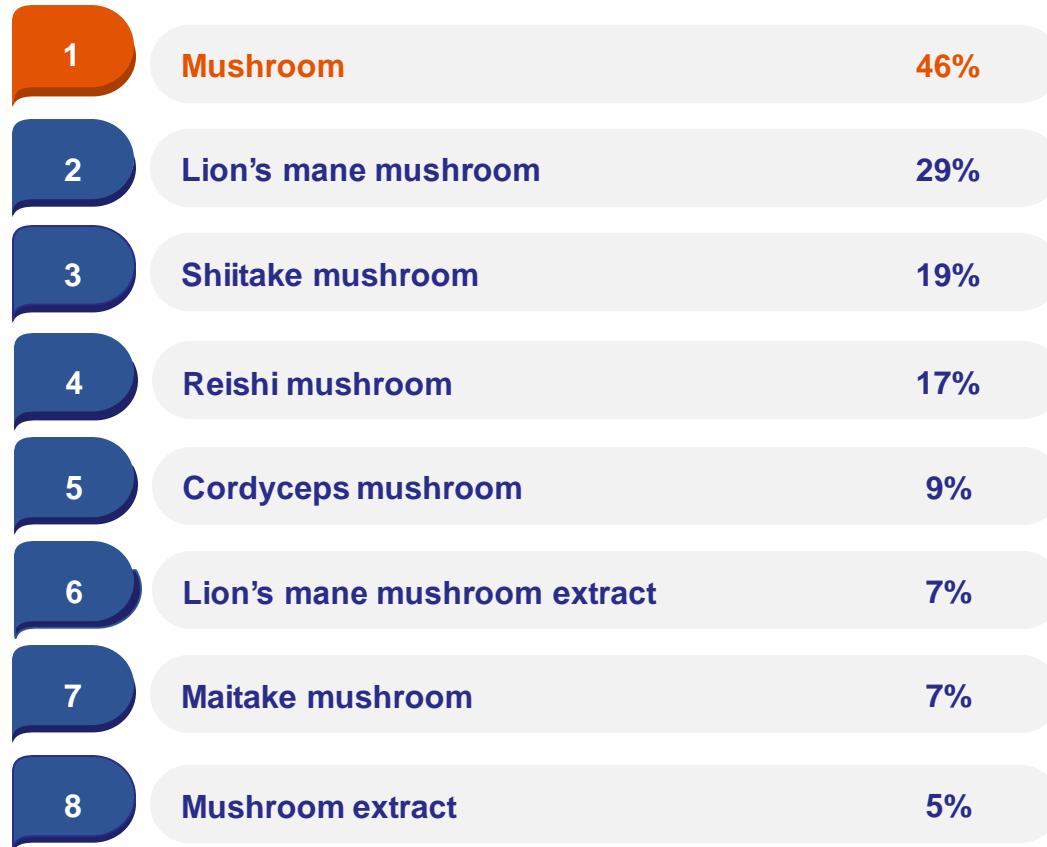
United States, Apr 2023

SuperGreens Immune contains organic mushrooms from SuperShrooms to **enhance mental focus, support athletic performance, and provide key beta-glucans.**

Source: Innova Database

Mushroom-other is the primary ingredient tracked with mushrooms in functional F&B launches

Figure 7 | Top ingredients as a % of new functional F&B launches tracked with mushroom ingredients (Global, 2022)



Contains shiitake & mushroom

Super Nature Super Vegan Mushroom Spinach Risotto

Australia, Apr 2023

Mushrooms: this unassuming superfood hero is rich in Vitamin B and selenium, a powerful antioxidant that helps to protect your cells and tissues from damage and **boost your immunity**.



Contains lion's mane mushroom

Mosh Lemon White Chocolate Crunch Bar

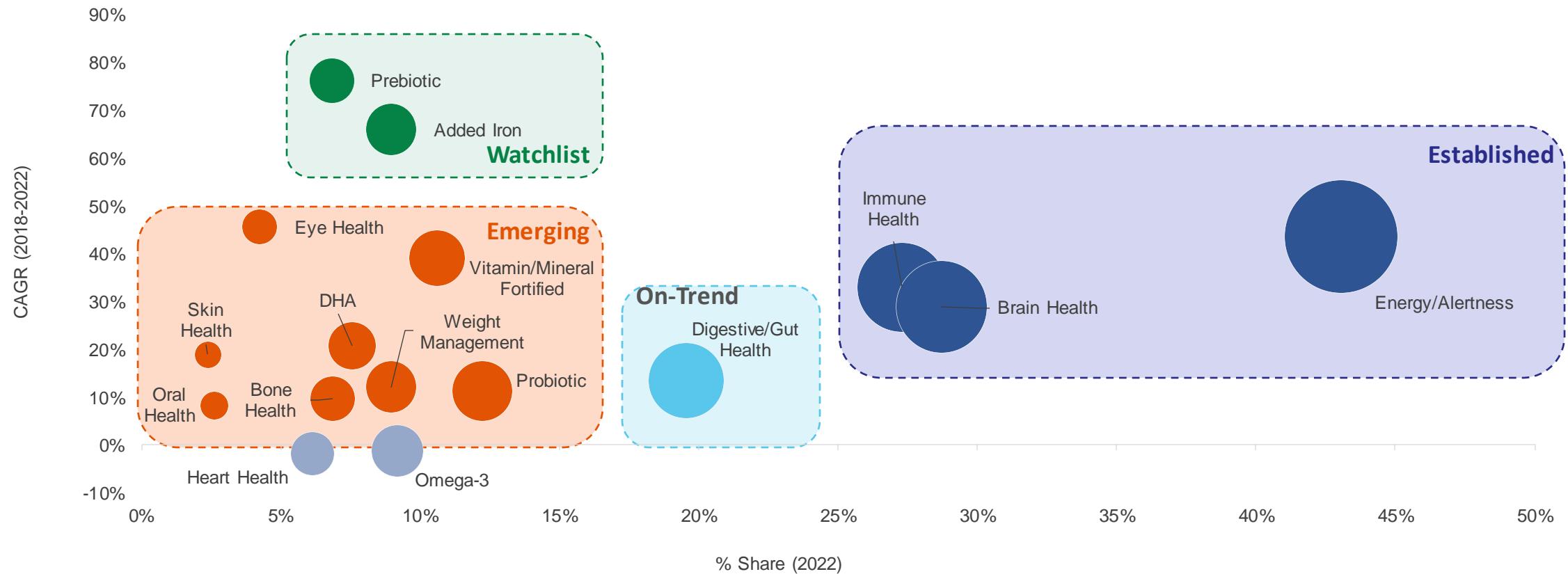
United States, Jun 2023

Each ingredient in our signature brain fuel blend was recommended by top neuroscientists and functional nutritionists to **support brain health**.

Source: Innova Database

Prebiotic and added iron claims in functional F&B with mushrooms grow fast

Figure 8 | Top positioning as a % of new functional F&B launches tracked with mushroom as an ingredient and growth rate (Global, 2018-2022)



Source: Innova Database

Notes: Health claims with <3% share in 2022 is excluded. Bubble size: No. of product launches in 2022

Watch out for fastest growing functional F&B with mushroom ingredients

Prebiotics



Contains: Lions mane extract

Microbiotic Creamer with Prebiotics and Mushroom Extract

Spain, Apr 2023

For body energy. With prebiotic fiber and mushroom extract, its daily consumption will help you improve your intestinal health.

Energy/alertness



Contains: Ginseng & lions' mane mushroom

Rollagranola Energize Crunchy Adaptogenic Granola

United Kingdom, Jun 2023

Delivers sustained energy but also tantalizes your taste buds. Nutritiously nootropic, naturally.

Brain health



Contains: Organic reishi, organic rhodiola

Cool Mint

United States, May 2023

Packed with lion's mane, reishi, and bacopa to fine-tune your brain into a focused locomotive.

Source: Innova Database

Mushrooms are favored as immunity-boosting adaptogenic ingredients

Gourmet Sauvage offers coffee with adaptogenic mushrooms

MushUp FOREST - with Gourmet Sauvage



Coffee with Reishi Mushrooms • Lion's Mane • Chaga • Turkey Tail

Gourmet Sauvage offers you the opportunity to connect with the territory through the foraging of wild plants and mushrooms.

Mushrooms
Reishi + Chaga +
Lion's Mane +
Turkey Tail

IMMUNITY and VITALITY
Combats oxidative stress,
strengthens the immune
system, improves digestive
health and concentration.

Immunity sparkling beverages with reishi mushroom



Living authentically brewed kombucha. We combine it with reishi mushroom along with vitamin D to help support your immune system.

With powerful adaptogens to balance the body. 200mg reishi mushroom extract for immunity.

Sources: Innova Database, [MushUp](#)

Mushroom functionality blooming through superfoods

Frozen plant-based superfood desserts

Glow Superfood stands out in the market with its indulgent yet nutritious frozen superfood desserts.

Plant-based superfood frozen dessert that nourishes the body and the brain!



10 species of organic mushrooms including lion's mane, reishi, cordyceps, turkey tail, chaga, king trumpet, maitake, aniridia camphorata, shiitake, and Agaricus blazei. The vast benefits of these mushrooms range from **cognitive health, energy support, immunity, healthy aging, gut health, healthy blood sugar, liver support, and stress management**.

Laird Superfood with functional mushrooms



Laird Superfood instant Latte with Chai, Creamer and Adaptogens

United States, Feb 2023

Laird adds adaptogens and **functional mushrooms to his diet to help him stay balanced in moments of stress**. Naturally occurring MCT (from coconut) + caffeine = lasting energy. Delicious, creamy latte experience

Sources: Innova Database, [Glow Superfood](#)

Research supports the future of mushrooms in overall health and wellbeing

Psychedelics gaining popularity for their therapeutic effects



Psychedelics research pushes frontiers of mental well-being and addiction recovery



27 Jan 2023 --- **Psychedelics** are gaining popularity in the **mental health space for their potential therapeutic effects on the brain, treatment-resistant depression and addiction**. We delve into the impact the natural compounds psilocybin and ibogaine have on the human brain and how they can affect mental wellbeing, including serotonin and other neurotransmitters.

Lion's mane mushroom improved brain cognition



Lion's mane for brain cognition: Researchers find merit in traditional Chinese medicine



13 Feb 2023 --- Researchers at the University of Queensland, Australia, have discovered **lion's mane mushrooms** to improve brain cell growth and memory in pre-clinical trials. **The team revealed active compounds from the edible mushroom boosts nerve growth and enhances memory**. "Extracts from these so-called 'lion's mane' mushrooms have been used in traditional medicine in Asian countries for centuries, but we wanted to determine their potential effect on brain cells scientifically,"

Sources: [Nutrition Insight 1](#), [Nutrition Insight 2](#)



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