

AGAINST THE GRAIN

THE GLUTEN-FREE MARKET HAS GROWN FROM A SELECT OFFERING TO AN EXPANSIVE CATEGORY WHERE FOOD AND SUPPLEMENT OPTIONS ABOUND.

BY BRIAN ELLIS

It may first be noticed as an uncomfortable stomach sensation after eating. This pain could be overlooked for years as nothing more than a natural result of the body digesting food. Yet it is estimated that roughly three million people in the United States suffer from a gluten intolerance known as celiac disease (CD), as estimated by The University of Chicago Celiac Disease Center. And out of this number, only about three percent are diagnosed.

CD, also known as celiac sprue, is a chronic inherited digestive disease that

has a range of symptoms varying from the tolerable, like a fleeting abdominal discomfort or a headache, to the debilitating, such as osteopenia, a thinning of the bones that could lead to osteoporosis. While the symptoms of CD may only appear minimal, and even unnoticeable, the gluten is nevertheless damaging the small intestine, which can result in an impaired absorption of critical nutrients that can lead to malnutrition.

A composite of the proteins gliadin and glutenin, gluten is found in the grains wheat, barley and rye. Though not contained in oats, cross contami-

nation during production can be problematic for people with gluten sensitivities.

"Gluten can be found in many food additives, thickeners and stabilizers," said Dr. Helen Lee, DC, and practitioner for chicagohealers.com. "Some hidden gluten can be found in food such as malt vinegar, hydrolyzed vegetable protein, soy sauce, cereal products, modified starch and vegetable gum.

Therefore, it can many times be a challenge to find true gluten-free foods."

For such a widespread concern as CD, the gluten-free category has had a brief history that stems back only a cou-

ple decades. "While a number of packaged foods historically have not included ingredients with gluten, the first packaged foods that tested for gluten and promoted the fact that they were gluten-free were probably introduced in the late 1980s," explained Jerry Shafir, president and founder of Kettle Cuisine (Chelsea, MA).

However, the momentum of this market really didn't hit its strides until much more recently. "The category really started to take off about five years ago when the NIH [National Institutes of Health] moved Celiac Disease off the rare disease list," offered Pamela Giusto-Sorrells, president and founder of Pamela's Products, based in Ukiah, CA. "This opened the doors for greater education and diagnosis."

The Gluten-Free Advantage

Not only can a gluten-free diet allow people with gluten sensitivities to eat without the worry of developing symptoms, it also has a number of other side effects not as well known.

"There are a number of different health benefits associated with a gluten-free diet that do not have the same level of scientific backing as celiac disease, but have strong anecdotal support," said Shafir. He went on to mention a number of conditions that gluten-free diets have helped cure or mitigate the symptoms of, including autism, ADD, ADHD, arthritis, diabetes and others. "There are also examples of individuals who have successfully used gluten-free diets to lose weight," he said.

For Lizanne Falsetto, CEO for thinkproducts (Ventura, CA), going gluten-free added a number of benefits to her quality of living. "Wheat never made me feel good, so I left it out of my personal diet," she explained. "Going gluten-free can help reduce pain from abdominal bloating, gas, muscle cramping and fatigue."

Julie Kirk, co-owner of the Bonners Ferry, ID-based Mountain Mike's, has seen this difference with her customers. "A lot of people are going on gluten-free diets because of different health issues. I've noticed that getting rid of gluten has helped customers reduce inflammation and allergies," she said.

Gluten-free diets can also lead peo-

ple away from processed wheat products, which tend to be high in carbohydrates.

Booming Business

Since the inception, gluten-free products have quietly grown into an industry powerhouse, bringing in revenue that has yet to hit its peak. In the 52 weeks ending January 24, 2009, market researcher SPINS reported sales of GF in the natural supermarket channel reaching close to \$252 million, an increase of 19 percent.

Similarly, an April 2009 Packaged Facts report titled "The Gluten-Free Food and Beverage Market: Trends and Developments Worldwide" stated that the US gluten-free market has had a compound annual growth rate of 28 percent from 2004-2008.

"These numbers should serve as a clear indicator that consumers are being increasingly aware of gluten intolerance, as well as gluten sensitivity," said Jayson Kroner, health and fitness editor for the Bloomingdale, IL-based NOW Foods.

Added Falsetto, "More and more I've seen four-foot sets expand to eight, not to mention complete aisles now being dedicated to gluten-free. I believe it's an exciting time with this market. People are demanding gluten-free food."

Bread is Just the Beginning

Essential to the elasticity of wheat dough, gluten (Latin for glue) also enables the dough to rise when baked. Not surprisingly, this association has left many people—and manufacturers—focusing on gluten's presence primarily in baked goods.

"Historically, gluten-free prepared products have been concentrated in the areas of starches and sweets. There have and continue to be a large number of offerings in the pizza, bread and dessert categories," said Shafir. "There has been a lack of other mainstream prepared foods, making it practically a requirement that those with gluten intolerances prepare many of their own meals at home. This void is



beginning to change as a few previously overlooked categories are being addressed by various manufacturers."

Kettle Cuisine has helped to fill this void with its line of all natural, gluten-free soups. The line currently has nine varieties that include organic, vegetarian and heart healthy options, not to mention two new products—Three Bean Chili and Organic Roasted Eggplant & Tomato Soup—which will be added this September.

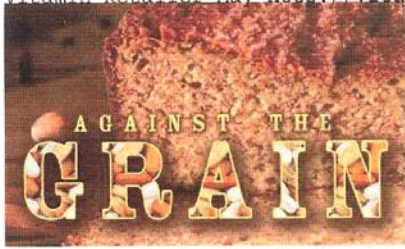
"Kettle Cuisine's soups are set apart from competitors because of their superior taste, the company's commitment to 'real food' and the gluten-free safety guarantee," said Shafir. "By testing every batch made for fewer than five parts per million, we offer peace of mind to those with gluten intolerances that they will enjoy consistently safe products from Kettle Cuisine."

To make its gluten-free products easier to spot, Turtle Mountain (Eugene, OR) will begin displaying the official gluten-free icon from the Gluten Free Certification Organization (GFCO) prominently on its packaging in the Fall of 2009. "Most but not all of Turtle Mountain's products are gluten-free," explained Chris Turek, the company's

marketing manager. "For example, the wafer in the ice cream sandwiches contains gluten. The company's website offers a list of over 50 gluten-free items."

For those who may be gluten sensitive yet still crave that occasional sweet fix, Turtle Mountain has created its





Purely Decadent Gluten-Free Chocolate Chip Cookie Dough ice cream. In addition to being gluten-free, the ice cream is also dairy-free, and is made with organic soymilk as well as organic dehydrated cane juice and other organic ingredients.

Yet, for gluten-free customers still salivating over the simple pleasures of baked goods, Pamela's Products has announced its newest addition to the company's full line of gluten-free products: Pamela's Cornbread & Muffin Mix. Added Giusto-Sorrells, "One of the most important factors for a person on a gluten-free diet is knowing that they can trust the brand they purchase. That's why everything with the Pamela's brand is gluten-free." For the future, Pamela's is planning a full line of ready to eat cakes and cheesecakes.

Supplements for Sensitive Stomachs

There's no question that gluten-free products have hit the natural products industry in a big way. This success, however, has overshadowed the growth of gluten-free supplements, which have

yet to reach the recognition of more traditional grocery items. However, avoiding gluten in supplements is no less critical for someone with CD as any other product.

"The market is now making adjustments, not only in the way food is processed, but also in minimizing these allergens in the production of dietary supplements," said Guy Devin, PhD and national science educator for Source Naturals (Scotts Valley, CA). "The category has quietly been growing, and, as a company, we strive to make quality supplements without the use of gluten-containing ingredients whenever it is possible to do so. Remember we want to do no harm, so keeping these ingredients out of our supplements whenever possible is important in formulating quality products for all."

Thankfully, the gluten-sensitive customers at Mountain Mike's are keeping close notice and are being helped along in the process. "Most people with gluten allergies read the bottles carefully," said Kirk. "Manufacturers are labeling products better than ever, with large letters on the front of the label."

Many companies are now even focusing the bulk of their production on gluten-free items. "Of the 1,500+ prod-



ucts that NOW Foods manufactures, only 33 contain gluten," said Kroner.

And to help the digestive process, NOW Foods manufactures an enzyme formula that aids in the digestion of gluten-containing foods, called Gluten Digest. "Some of the world's leading gluten experts and researchers are now suggesting that [gluten-related] conditions may respond very favorably to digestive enzymes that work by assisting the body in breaking down difficult to digest proline-containing peptides (gluten)," added Kroner, "especially

THE LATEST FROM THE FDA

There may be more good news ahead for gluten-free consumers. The US Food and Drug Administration (FDA) along with the Codex Alimentarius Commission, a committee created to develop international food standards and guidelines, have proposed establishing a uniform standard for food labeled gluten-free. This new standard would require that food labeled "gluten-free" contain no more than 20

parts per million of gluten. This comes after the passing of the Food Allergen Labeling and Consumer Protection Act (FALCPA) in 2004, which came into effect January 1, 2006. This act required all companies to state whether their foods contained a "major food allergen," which includes milk, eggs, tree nuts, fish, peanuts, shellfish, soy and wheat. While wheat does account for a large percentage of the gluten contained in

foods, the FALCPA does leave out the other offending gluten agents barley and rye, making the need for an official gluten-free standard as important as before.

This proposed gluten-free standard is still under review, as the FDA is currently considering the comments made during the public hearing on allergen advisory labeling held September of 2008. According to the Center for Food Safety and Applied

Nutrition's website, www.cfsan.fda.gov, this meeting was intended to solicit "comments and information to assist the agency in determining how manufacturers currently use advisory labeling, how consumers interpret different advisory labeling statements, and what wording is likely to be most effective in communicating to consumers the likelihood that an allergen may be present in a food."



those generally known to come from dairy products and cereal grains."

The Retail Angle

One of the great challenges faced by people with CD, not to mention those who shop for people with the condition, is finding groceries that truly are gluten-free, since even a slight contamination has the potential to be detrimental. While there has been a growth in the role manufacturers are taking in getting the word out about their GF products, there is still much a retailer can do to make this quest a little less challenging on his or her customers.

"Making it easy for consumers to find products in the store is the most effective strategy," said Kettle Cuisine's Shafir. "Some retailers dedicate gluten-free sections in the frozen food and dry good areas of their stores. Others provide guidebooks with products and their locations throughout the store. And still others use shelf talkers below each relevant product to identify products as gluten-free."

Creating a place in the store where customers can go and know everything they see will be safe for their gluten-sensitivities goes a long way in developing consumer confidence, and with it, loyalty. Also, building awareness of the symptoms of CD is another great tool in helping customers make educated decisions about the foods that are right for them. This can range from providing educational flyers to training staff to answer questions concerning the disorder.

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"We also recommend shopping tours and baking demos," said Giusto-Sorrells. "These are great ways to bring people into the store, create a stronger community within the store and help people to feel less intimidated by any new brands they might not be familiar with."

The Future for Gluten-Free

"We see this business continuing to grow, which is why we are continuing to invest in this market," said Turek. "In

the future, when we get our marketing budget back, we will also try to reach out to this group of consumers better, which will likely involve targeting various GF organizations, events, publications and websites."

And Turtle Mountain is not alone. With the combined channel sales for GF products expected to hit \$2.6 billion by 2012, according to the April 2009 Packaged Facts report, more companies will begin turning their attention to this market.

Falsetto has tapped into what she believes will be a future trend in the category—food-on-the-go—as thinkproducts recently released the gluten-free thinkThin Brownie Crunch bar. The bar boasts 20g of protein, is sugar-free and contains 18 essential vitamins and minerals. "What we offer is a product that is gluten-free, high protein, but without the bloated, gassy feeling," Falsetto explained. It is part of the thinkThin line, which includes more than half a dozen other bars, among them Chunky Peanut Butter and Chocolate Mudslide.

Commenting about the category, Falsetto added, "Gluten-free is more than a trend, but rather is something that will stay with us. It used to be hard to diagnose, but physicians have become more knowledgeable in the last three years. I truly believe education and awareness will become better as we grow the category. Gluten-free will just be incredible in the next few years."

Added Source Naturals' Devin, "There are millions of people with undiagnosed gluten sensitivities, but we are seeing increasing efforts to recognize their condition. What was a fad several years ago is now a serious issue we in the industry must pay attention to in supporting optimal health for all." **VR**

Resource:

Wexler, B. *Natural Guide to Gluten Intolerance*. Woodland Publishing, 2009.

For More Information:

- Kettle Cuisine, (800) 969-SOUP
- NOW Foods, (888) 669-3663
- Pamela's Products, (707) 462-6605
- Source Naturals, (800) 815-2333
- thinkproducts, (866) 988-4465
- Turtle Mountain, (866) 3-TURTLE

