



Food Technology Summit & Expo Guadalajara
Guadalajara, México (1 y 2 de junio, 2016)

Ideas disruptivas en alimentación: Más allá de lo tradicional

Dr Javier Morán

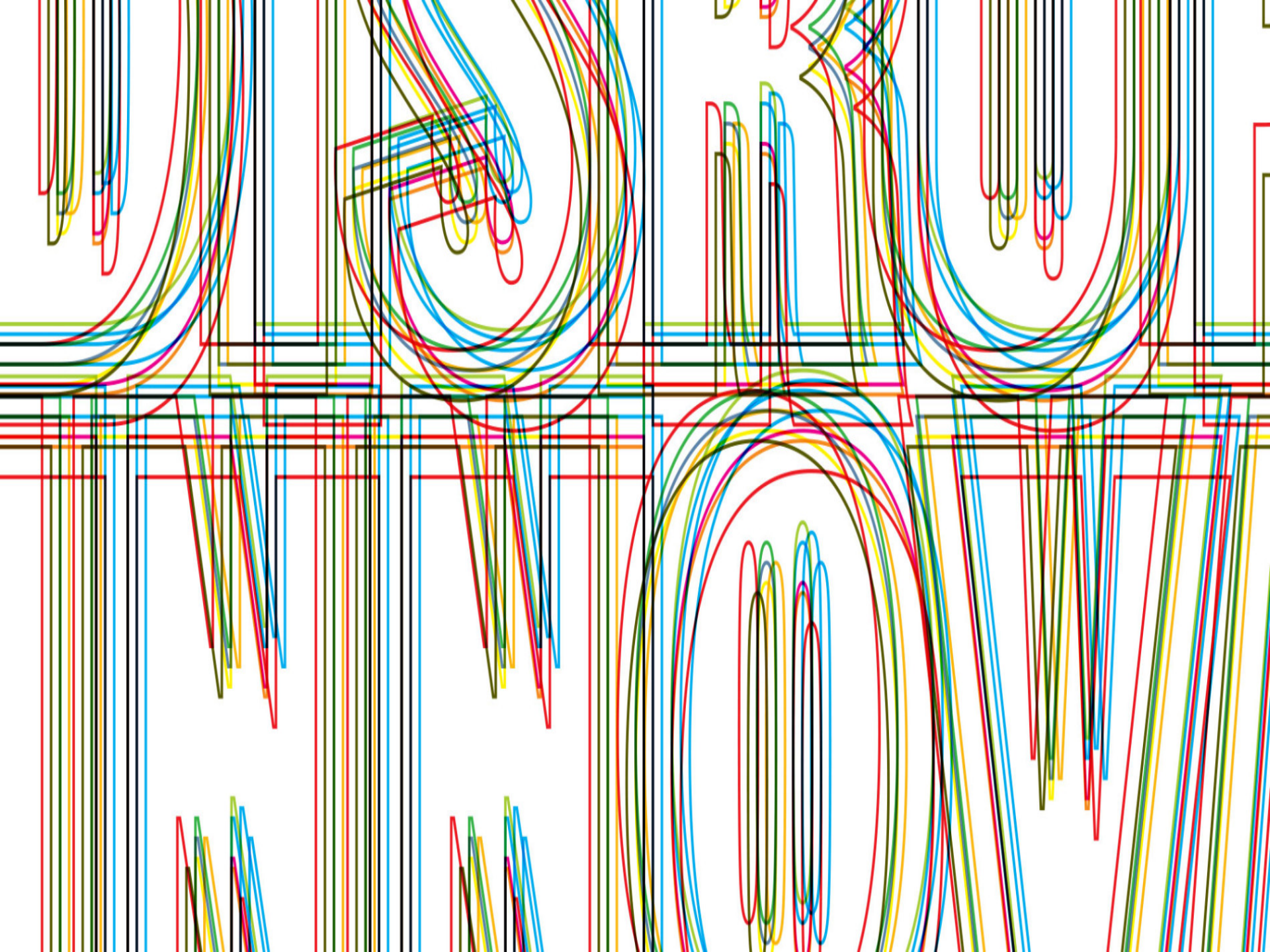
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Si buscas resultados distintos, no hagas siempre lo mismo.

Albert Einstein

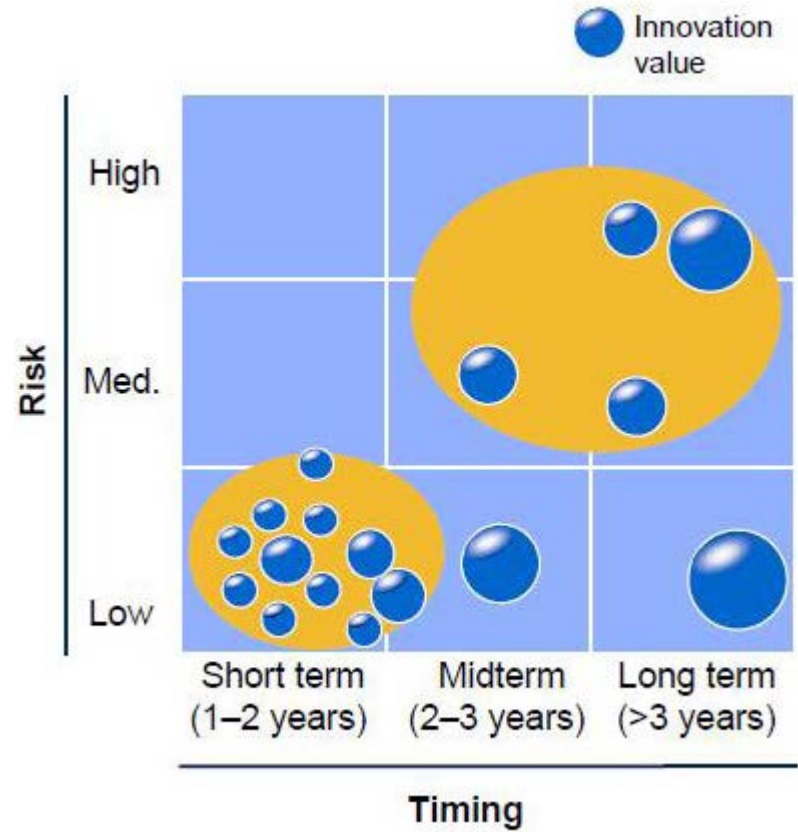


Brand new order

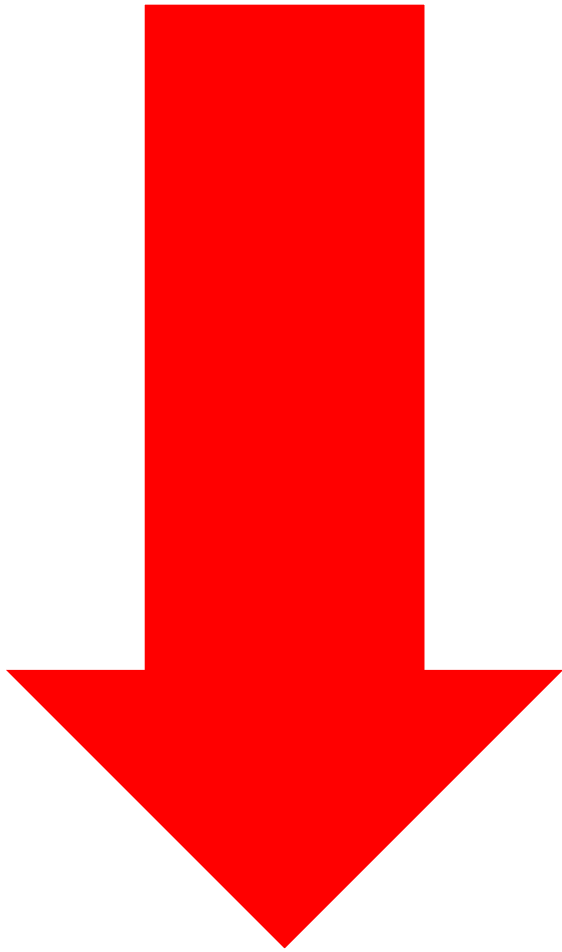
Disrupt or be disrupted

Creating value in the consumer products brand new order

EY
Building a better working world



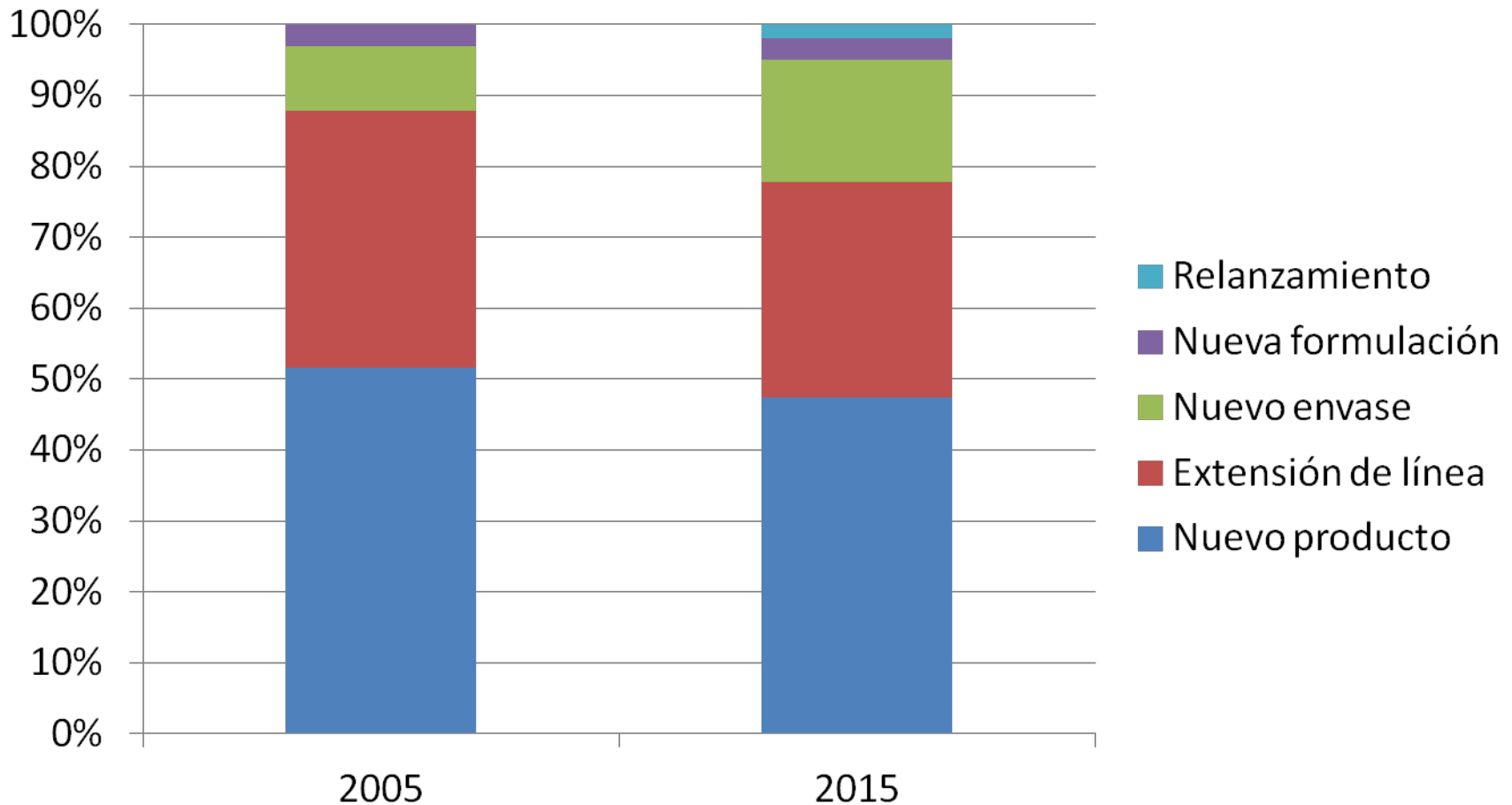
La innovación es muy importante PERO

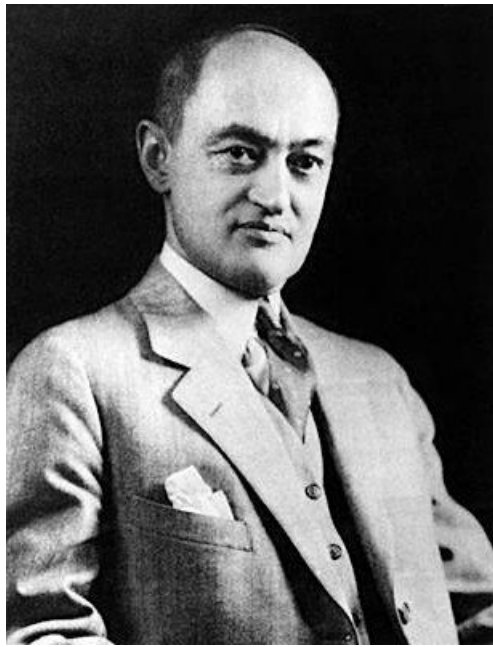


**Las innovaciones
decrecen un 6,3%
por año.**

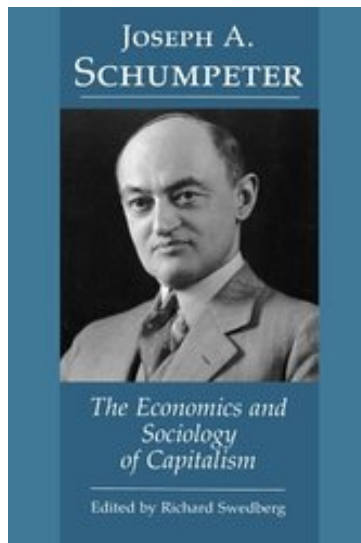
**El 75,2% de las
innovaciones no
sobreviven al
tercer año.**

NPD por tipo (más envases nuevos, menos variedad y menos productos nuevos)

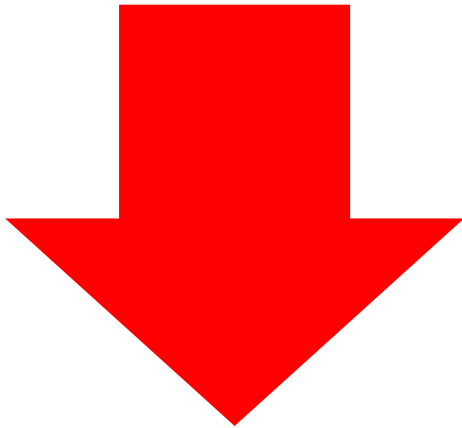




Aunque el capitalismo es un “vendaval perenne de destrucción creativa”, la innovación constituye el eje principal del progreso económico, al dar a nuevas empresas la oportunidad de desplazar a empresas asentadas, al tiempo, que las condenaría al fracaso, a menos que continuaran innovando.



Mitos vs realidades en innovación



Realidades

Hay millones de ideas brillantes que desconoces

Liderazgo + Cultura + Procesos: “Uno y trino”

Desarrolla la disciplina de alimentar las ideas

Analiza las oportunidades objetivamente. Crece cuando estés listo

Evalúa las ideas con amplitud de mente

Busca el equilibrio de comportamientos:
la iniciativa no siempre es la mejor estrategia

Mitos

Las ideas son el motor de la innovación

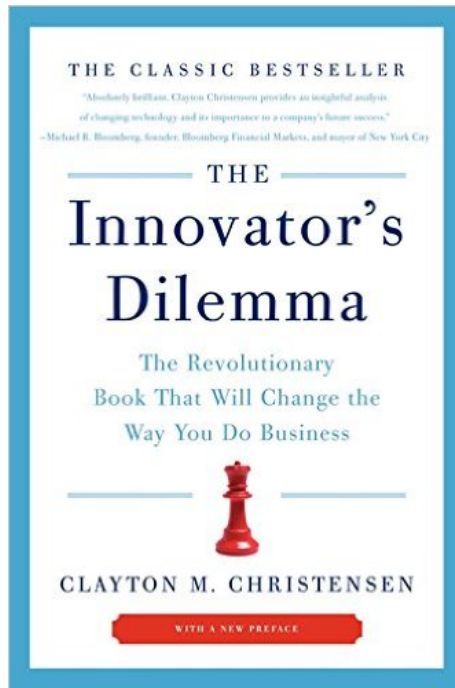
Un buen proceso genera todas las innovaciones requeridas

La innovación nos llevará a la prosperidad

Un buen método de evaluación filtrará todas las ideas buenas (y malas)

Las empresas con iniciativas tienen más éxito a largo plazo

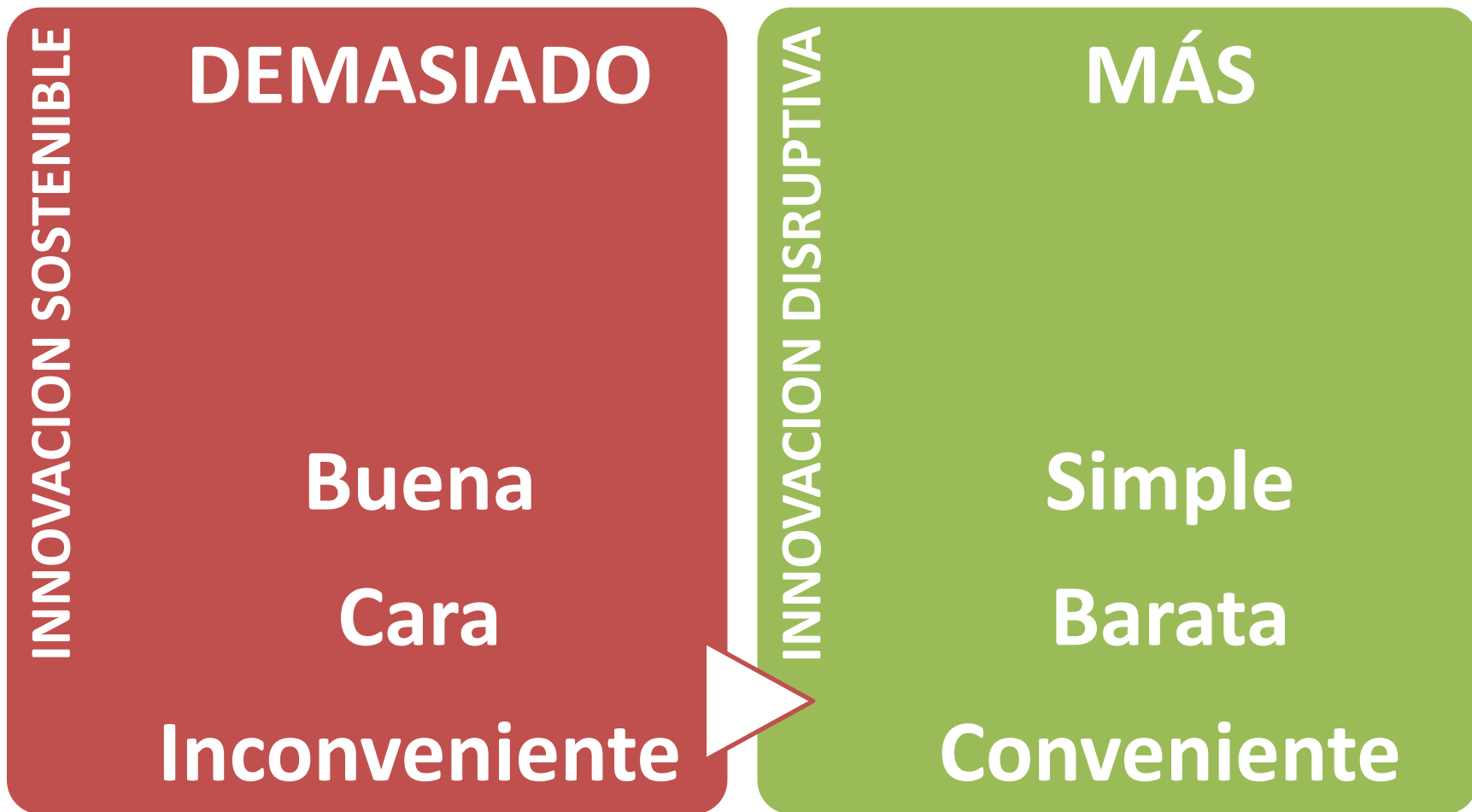




*Una innovación disruptiva es la clase de innovación que se produce cuando **un innovador lanza a un mercado una innovación sencilla, conveniente, accesible y asequible, que transforma por completo una industria y genera otra totalmente nueva a través de una propuesta de valor alternativa bien diferenciada.***



Innovación sostenible vs innovación disruptiva



The Economist explains

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The Economist explains

What disruptive innovation means

Jan 25th 2015, 23:50 BY A.W.



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HBR
JANUARY-FEBRUARY 1995



Disruptive Technologies: Catching the Wave

by Joseph L. Bower and Clayton M. Christensen

One of the most consistent patterns in business is the failure of leading companies to stay at the top of their industries when technologies or markets change. Goodyear and Firestone entered the radial-tire market quite late. Xerox let Canon create the small-copier market. Bucyrus-Erie allowed Caterpillar and Deere to take over the mechanical excavator market. Sears gave way to Wal-Mart.

The pattern of failure has been especially striking in the computer industry. IBM dominated the mainframe market but missed by years the emergence of minicomputers, which were technologically much simpler than mainframes. Digital Equipment dominated the minicomputer market with innovations like its VAX architecture but missed the personal-computer market almost completely. Apple Computer led the world of personal computing and established the standard for user-friendly computing but lagged five years behind the leaders in bringing its portable computer to market.

Why is it that companies like these invest aggressively—and successfully—in the technologies necessary to retain their current customers but then fail

to make certain other technological investments that customers of the future will demand? Undoubtedly, bureaucracy, arrogance, tired executive blood, poor planning, and short-term investment horizons have all played a role. But a more fundamental reason lies at the heart of the paradox: leading companies succumb to one of the most popular, and valuable, management dogmas. They stay close to their customers.

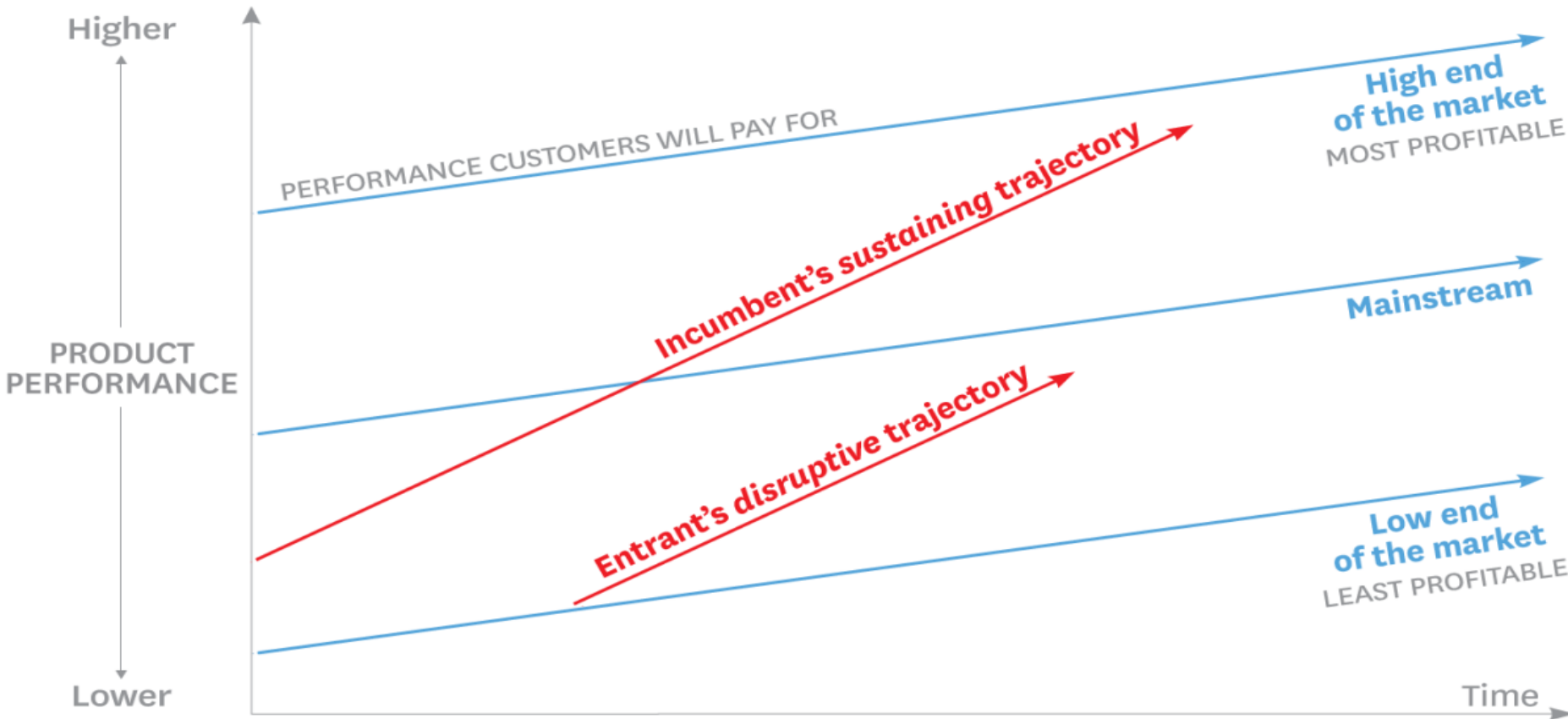
Although most managers like to think they are in control, customers wield extraordinary power in directing a company's investments. Before managers decide to launch a technology, develop a product, build a plant, or establish new channels of distribution, they must look to their customers first: Do their customers want it? How big will the market be? Will the investment be profitable? The more astutely managers ask and answer these questions,

Joseph L. Bower is the Donald Kirk David Professor of Business Administration at the Harvard Business School in Boston, Massachusetts. Clayton M. Christensen, an assistant professor at the Harvard Business School, specializes in managing the commercialization of advanced technology.

DRAWING BY CHRISTOPHER KING

The Disruptive Innovation Model

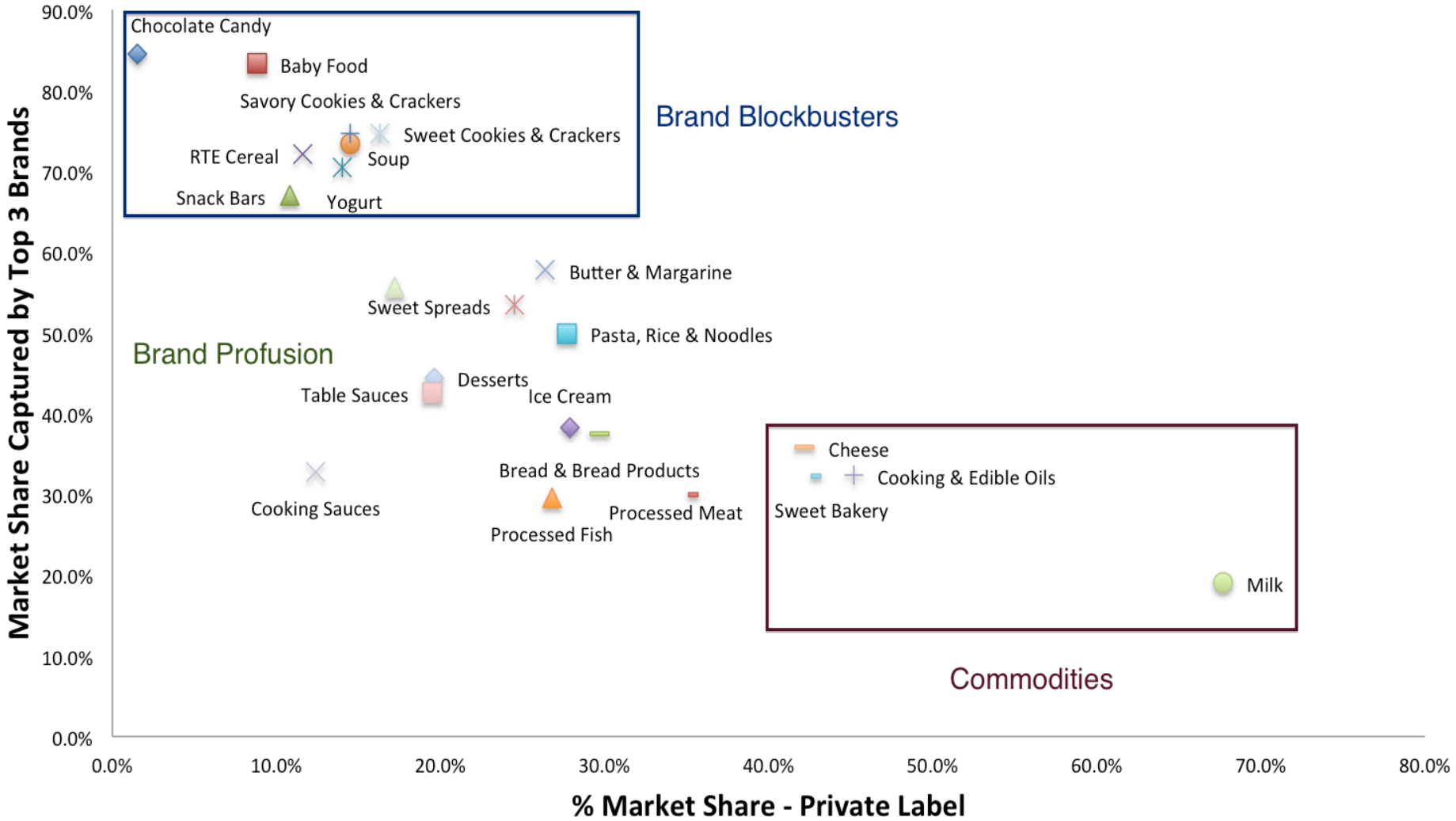
This diagram contrasts *product performance trajectories* (the red lines showing how products or services improve over time) with *customer demand trajectories* (the blue lines showing customers' willingness to pay for performance). As incumbent companies introduce higher-quality products or services (upper red line) to satisfy the high end of the market (where profitability is highest), they overshoot the needs of low-end customers and many mainstream customers. This leaves an opening for entrants to find footholds in the less-profitable segments that incumbents are neglecting. Entrants on a disruptive trajectory (lower red line) improve the performance of their offerings and move upmarket (where profitability is highest for them, too) and challenge the dominance of the incumbents.



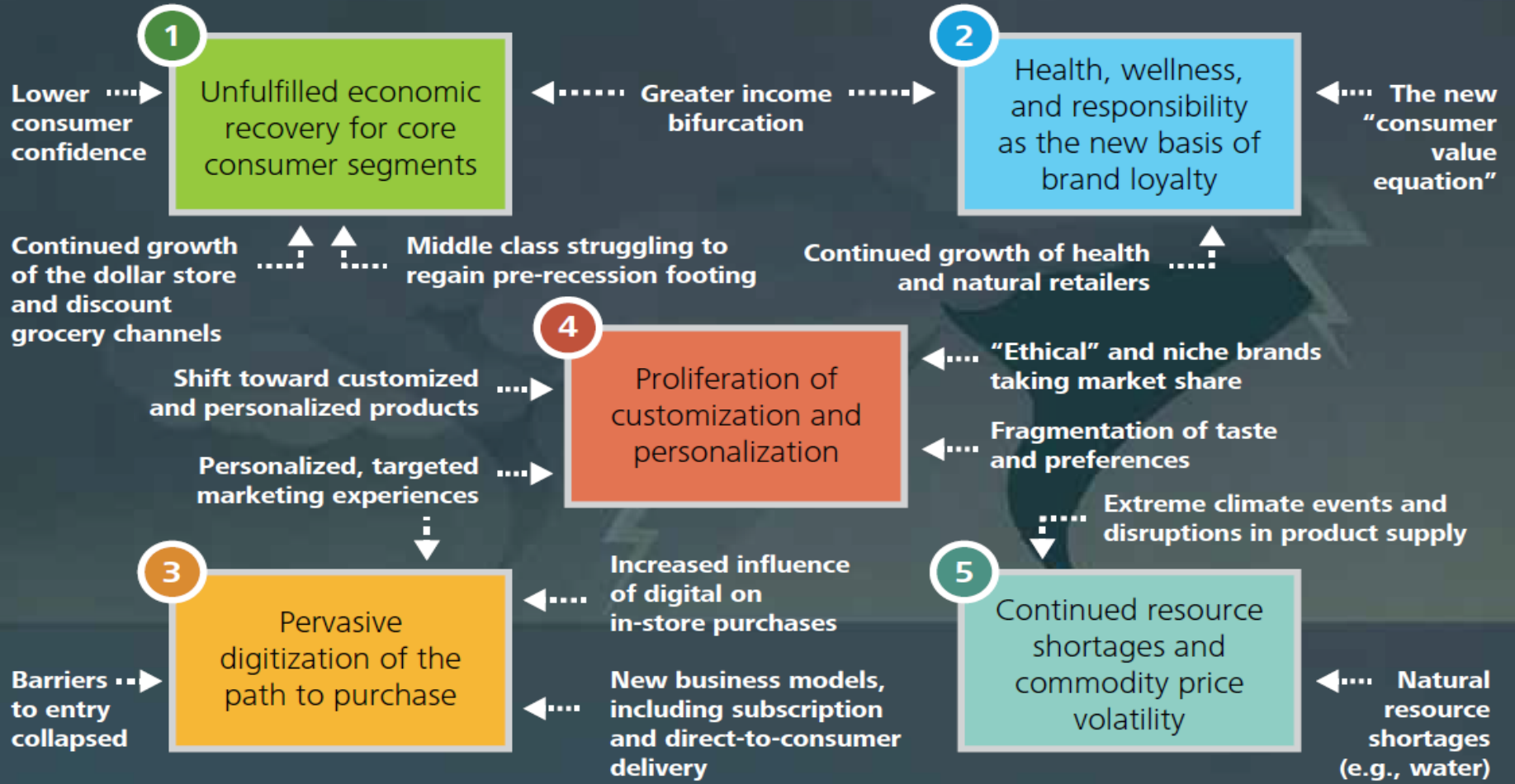
SOURCE CLAYTON M. CHRISTENSEN, MICHAEL RAYNOR, AND RORY MCDONALD
FROM "WHAT IS DISRUPTIVE INNOVATION?" DECEMBER 2015

*Algunos ejemplos de fallos en el
lanzamiento de alimentos
innovadores*

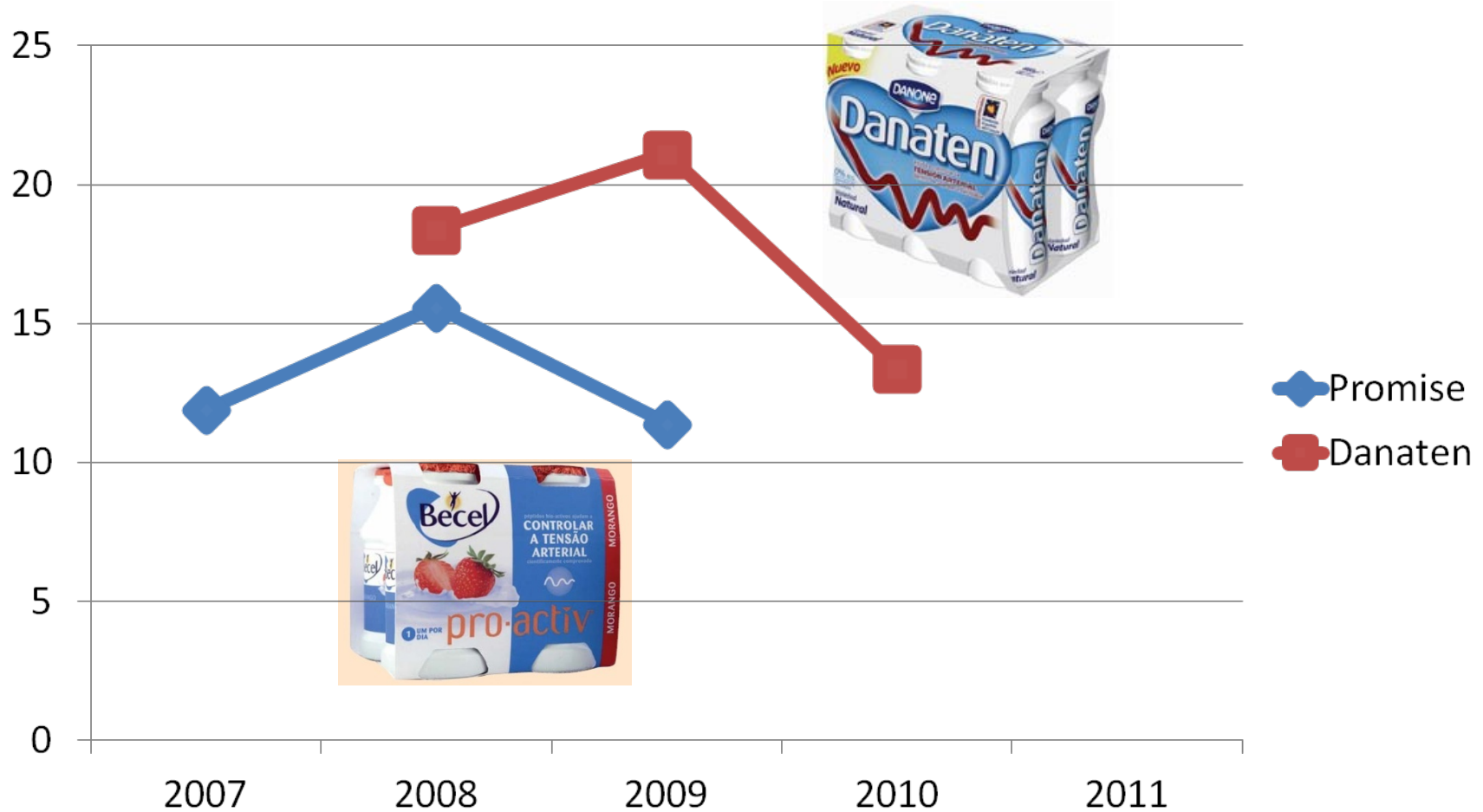
Dónde innovar? (éxitos vs básicos)



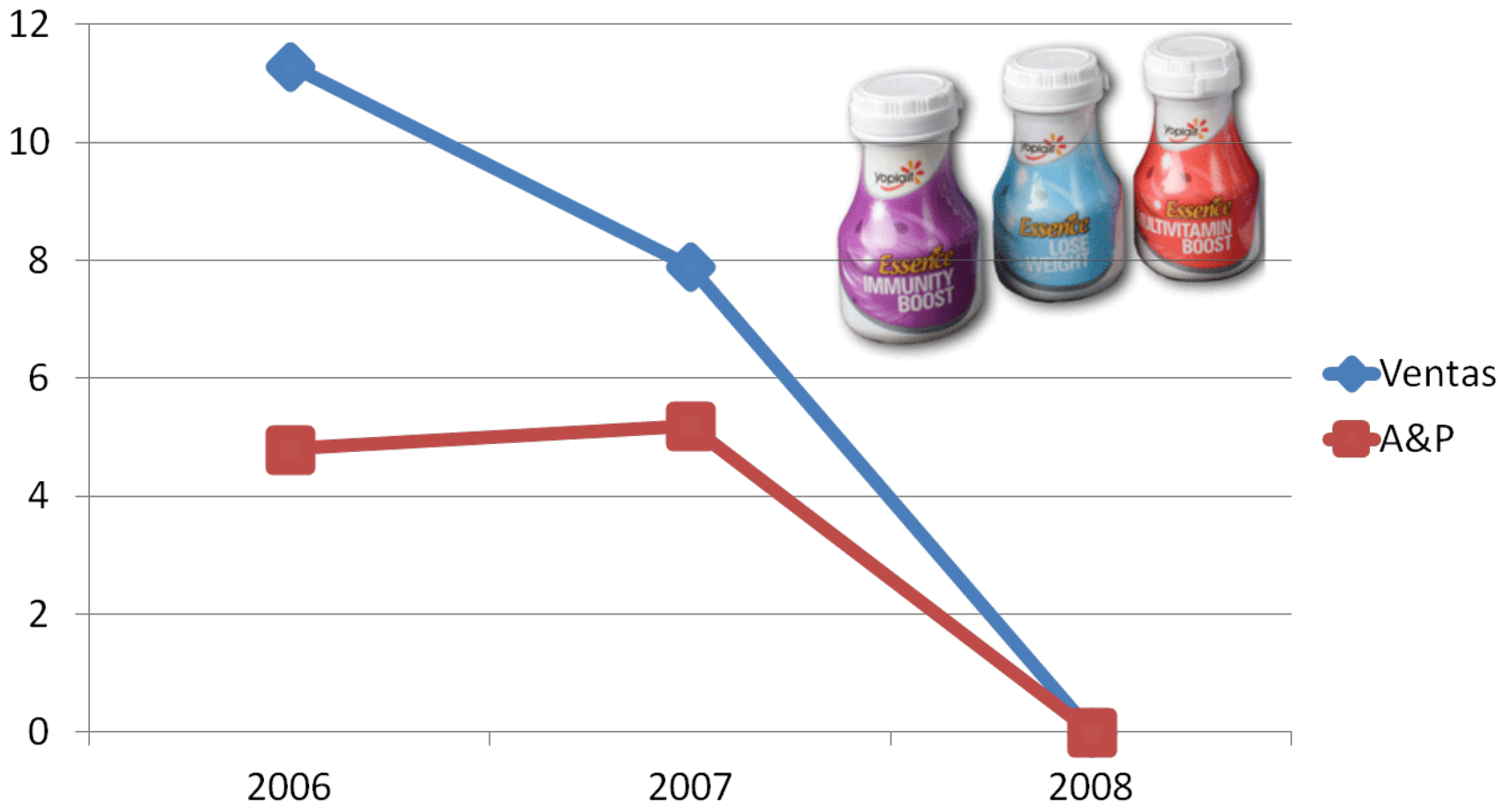
¿Qué considerar en las corrientes subterráneas que mueven la industria?



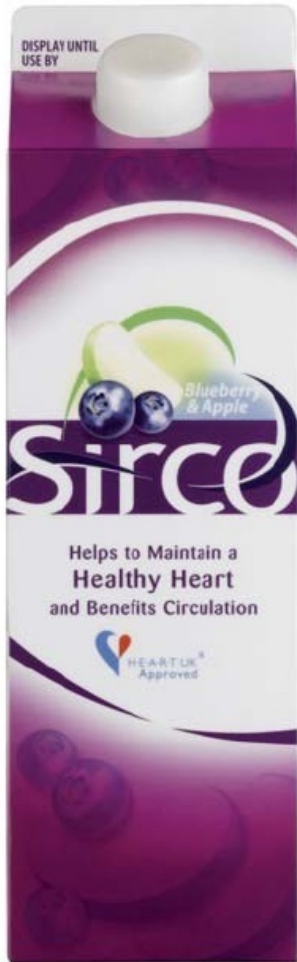
Cuando nos empeñamos en considerar mercado lo que es un nicho: Ventas de Promise y Danaten en Europa



Yoplait Essence. Sobre-estimar el mercado. Ventas vs A&P (mE)



Sirco. No vas a vender porque tengas un “claim”



The very first glass of Sirco helps maintain a healthy heart.

In fact it's the only drink shown to help maintain healthy circulation.

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So just one cold glass of Orange or Blueberry & Apple Sirco every day, as part of a healthy diet and lifestyle, helps to keep your lifeblood flowing.

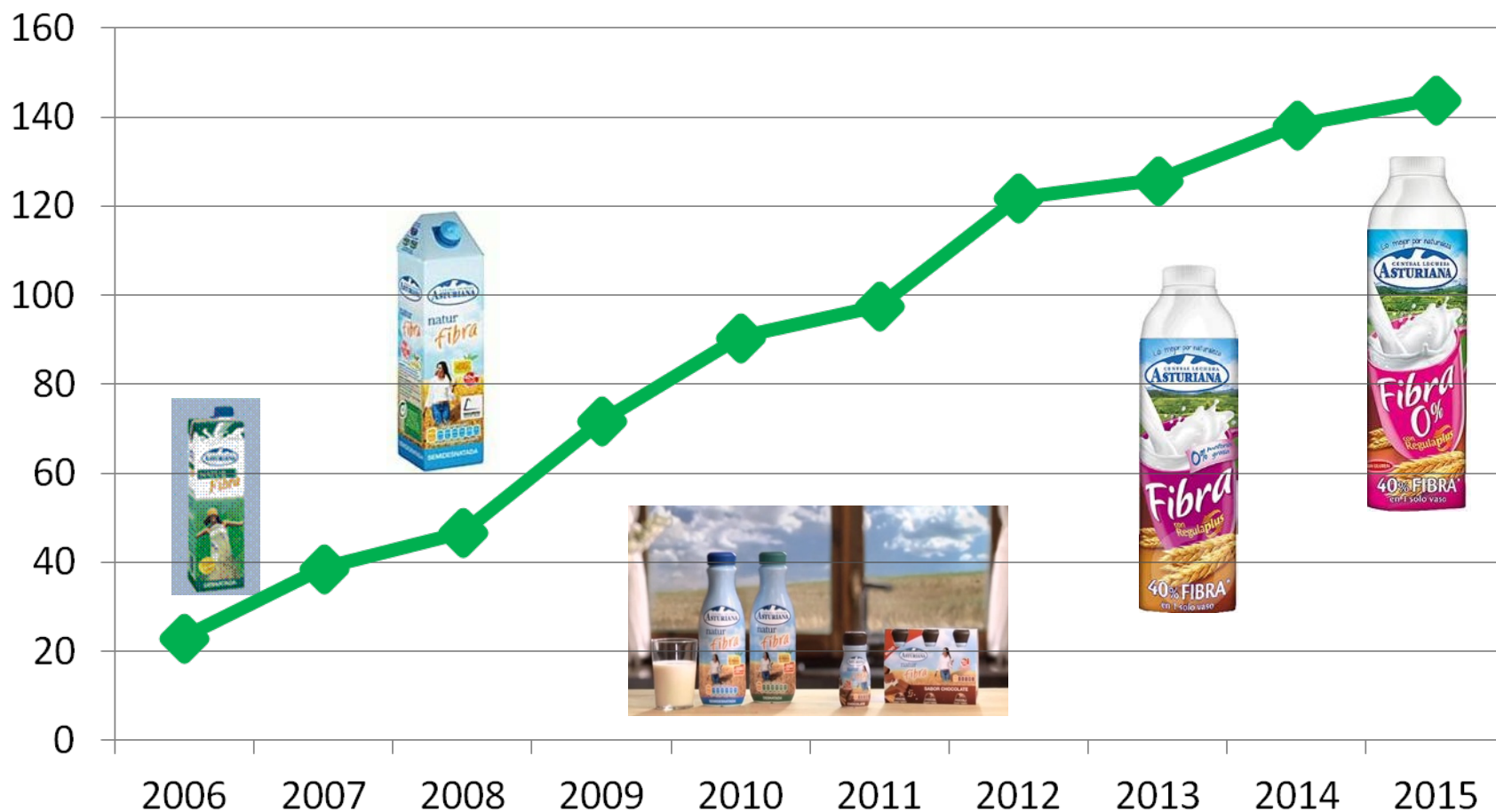
www.sircoheart.com
or call 0800 389 6398.

Available in the chiller cabinet at selected Tesco and Waitrose stores.



HEARTUK Approved

Es más, puedes vender mucho sin claim (si funciona): Naturfibra



Danone Essensis. A veces lo obvio no lo es tanto



¿Es esencial cuidar la barrera cutánea?

La barrera cutánea no sólo nos protege del medio exterior, sino que refuerza también la salud de nuestra piel. La piel es muy sensible a cualquier alteración de la misma. Una barrera cutánea desequilibrada produce una disfunción en el proceso de maduración celular y favorece la pérdida de agua. La piel se vuelve seca, frágil y áspera, e incluso pueden aparecer otros problemas dermatológicos como la hipersensibilidad cutánea o la dermatitis atópica.

El nuevo Essensis® de Danone es el primer alimento funcional en demonstrated. Un nuevo concepto que responde a la estrecha relación entre la salud de la piel y la nutrición. Essensis® contiene una combinación exclusiva de nutrientes activos. Probiotico®, que ayudan a fortalecer la barrera cutánea de forma natural. GLA del aceite de borraja, catequinas del té verde y vitamina E, incorporadas a fermentos probióticos. Los beneficios del nuevo Essensis® de Danone han sido testados científicamente.



Horizon DHA. Si no sabe bien no se vende

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Now take
DHA TO GO!

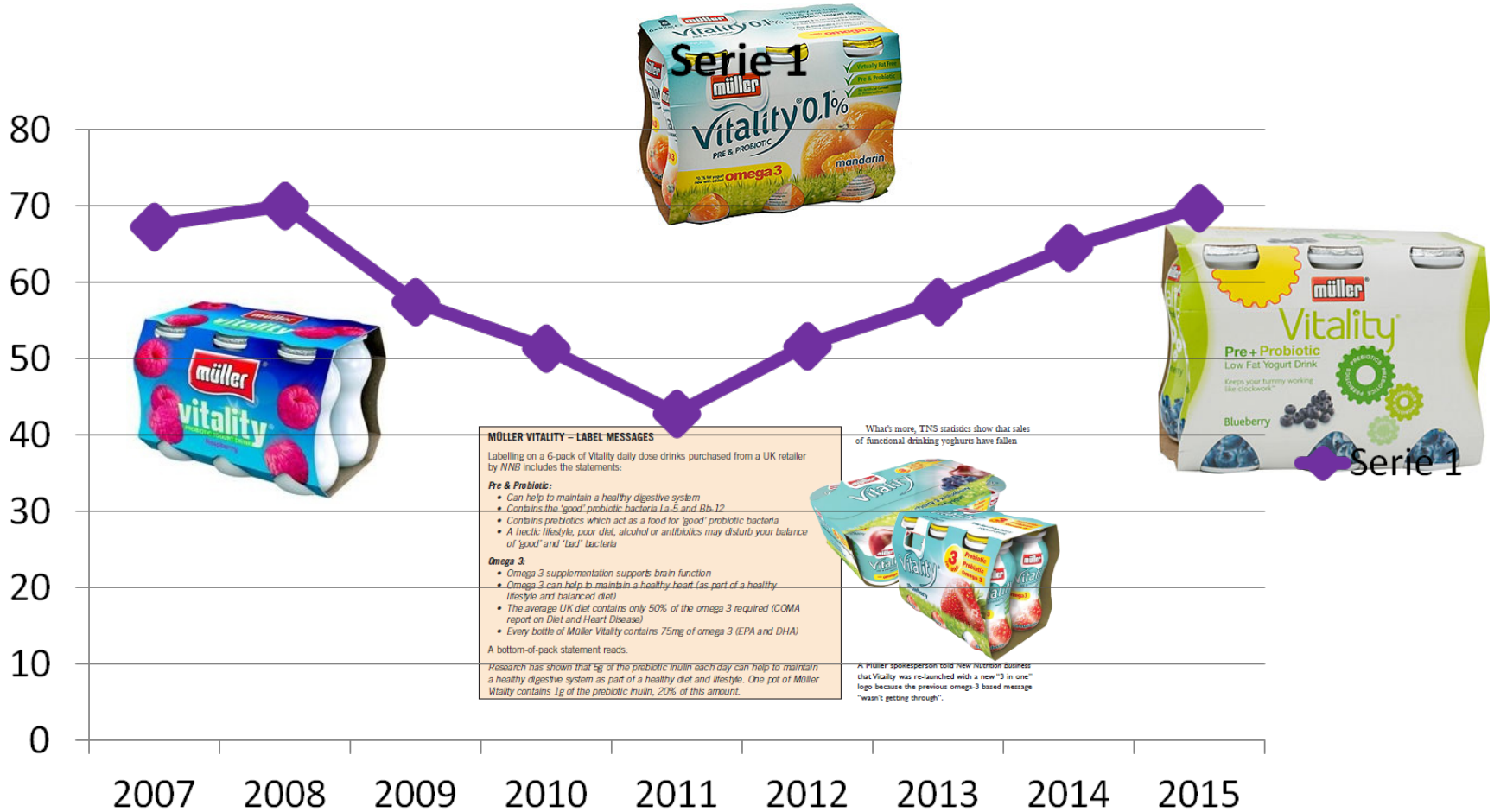
Our single-serve milk boxes provide 32mg of DHA Omega-3, a nutrient that helps support healthy brain development. In chocolate and vanilla, they're perfect for the lunchbox and beyond. [LEARN MORE ►](#)



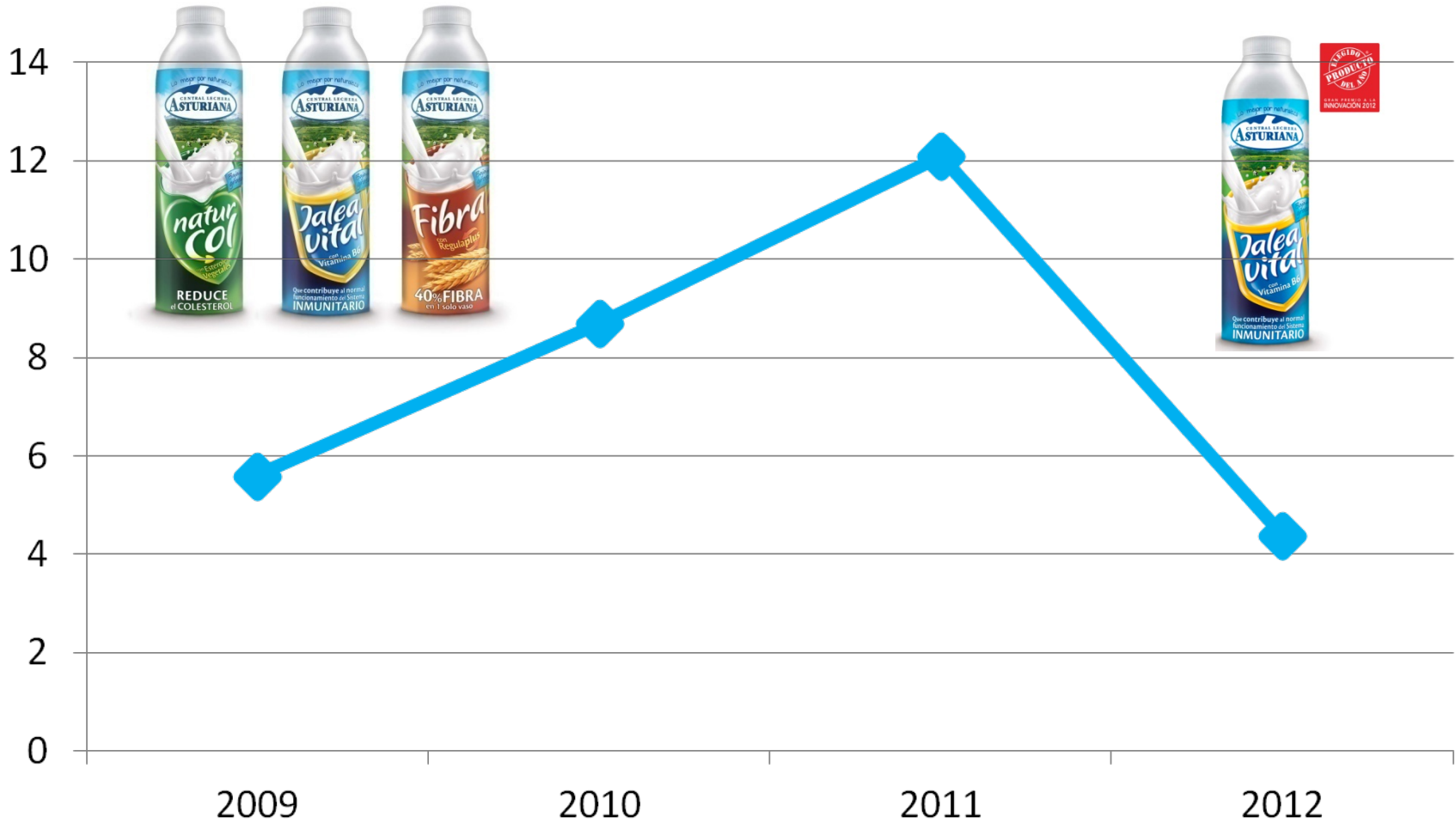
Promise Activ. Cuidado con las promesas excesivas



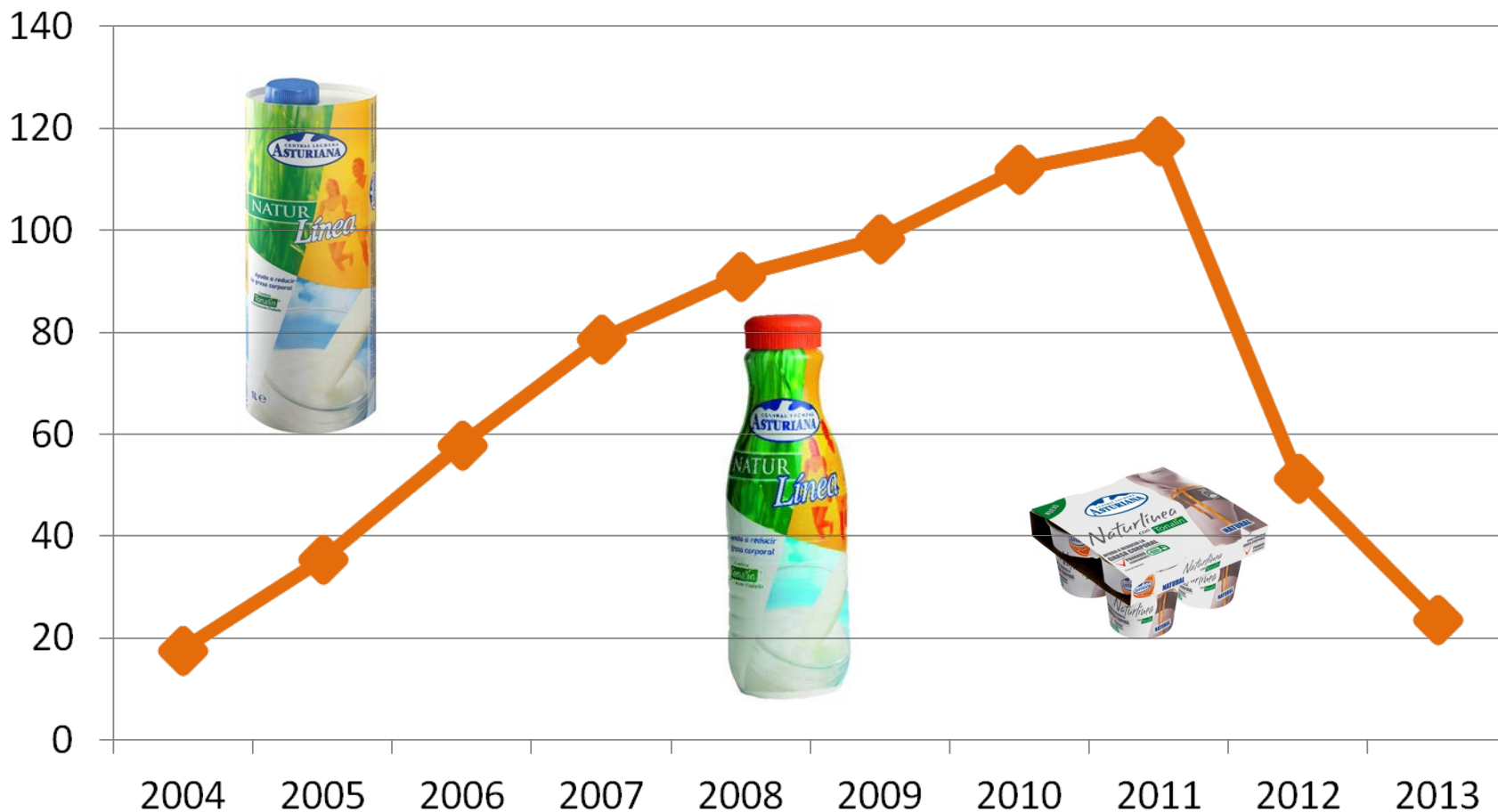
Müller Vitality: Demasiadas promesas no funcionan. Evolución de ventas (mE)



Copiar casi nunca es bueno. Jalea Vital



Un buen concepto no perdura para siempre: Naturlínea

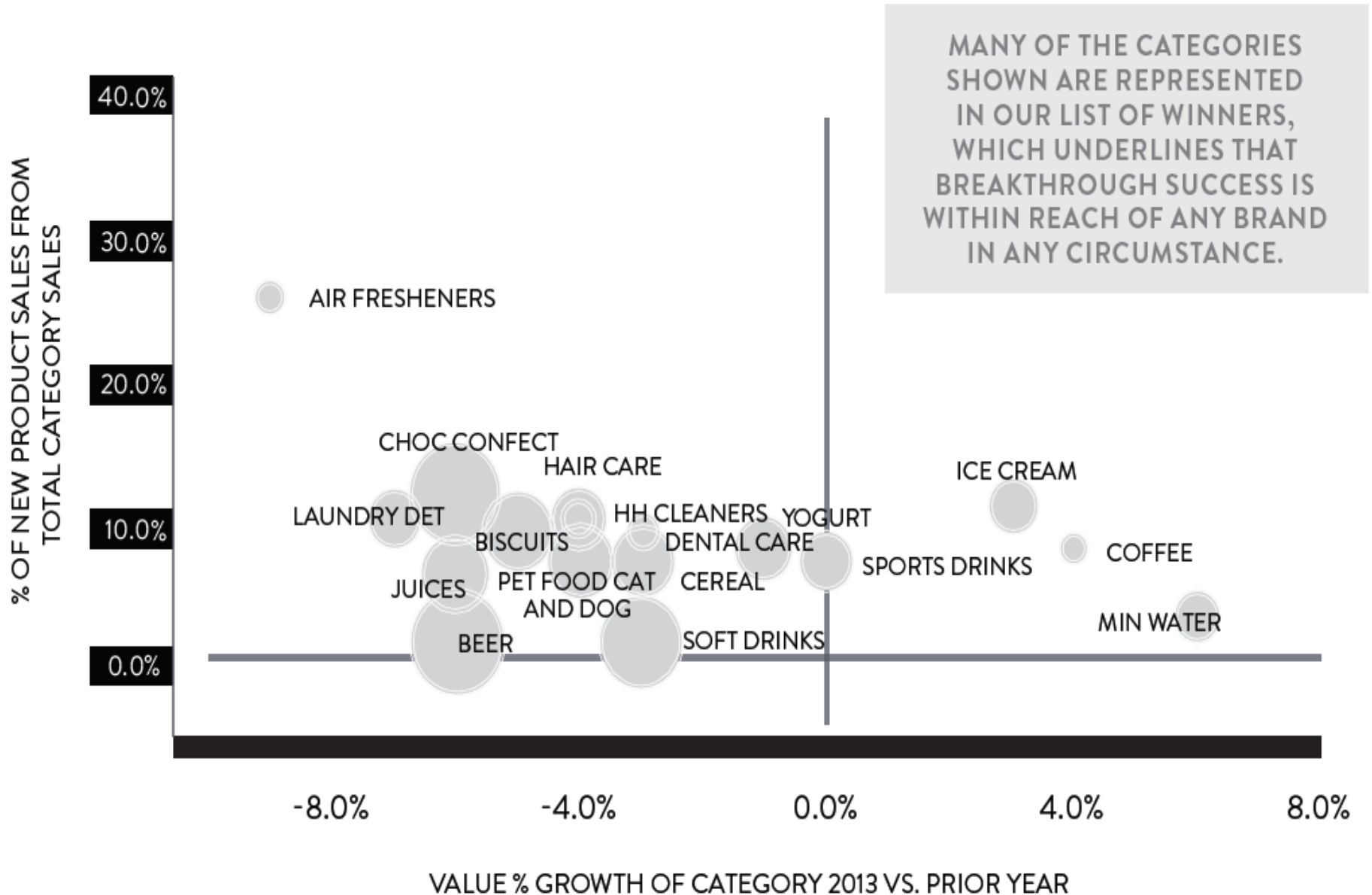


***Ejemplos prácticos de
innovaciones disruptivas***

Cambio de mentalidad

LA INNOVACIÓN DISRUPTIVA, ADEMÁS DE SER EL MOTOR DEL CRECIMIENTO DE LARGO PLAZO, ES UNA PLATAFORMA DE LANZAMIENTO A NUEVOS MERCADOS Y LA FÓRMULA PARA CREAR SEGMENTOS DE CONSUMO ORIGINALES. PERO PONERLA EN MARCHA EXIGE UNA MENTALIDAD DE NEGOCIOS COMPLETAMENTE NUEVA, OTRA FORMA DE MIRAR A LOS CLIENTES, Y ENTENDER LAS TAREAS QUE LOS PRODUCTOS Y SERVICIOS DEBEN REALIZAR PARA ELLOS.

THE IMPORTANCE OF INNOVATION TO A CATEGORY VS. PAST YEAR CATEGORY PERFORMANCE



Las primeras innovaciones disruptivas casi olvidadas: Alimentos funcionales

EDITORIAL

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APRIL 2008

'Disruptive innovation' is the driver of functional food success

'Innovation' is possibly one of the most over-used words in the food and beverage industry, often applied to a wide range of product ideas that are little more than incremental changes to existing product concepts. A company's quest for industry-changing innovation can involve as much toil and strife as that of the Knight of the Round Table for the Holy

Grail – and is almost always as fruitless. Back in 1995 a Harvard Business School researcher Clayton M. Christensen came up with the concept of "disruptive innovation", a concept which can be said to have had a profound impact on the business of food and health over the last two decades.

Disruptive innovation, says Christensen, is a product that overturns the existing status quo in a market. Disruptive innovations are broadly classified into two types:

- A low-end innovation, which is aimed at mainstream consumers who were ignored by established companies.
- A new-market disruption, which targets consumers who have needs that are not being served.

It's the second of these that's most applicable to innovation in functional foods. New-market disruption occurs, Christensen says, when companies create new markets and it can be seen that in functional foods (or health-enhancing foods, or whatever term you prefer) it is products that create new markets that are the most enduringly successful. In particular, it is products that are completely new and unknown to the consumer, which create new categories by creating new demand that didn't previously exist, which enjoy the greatest success.

Christensen adds that even when firms recognize the existence of a disruptive innovation they are reluctant to take advantage of it, since it would involve introducing a product competing with their existing (and often profitable) products to the market. The resource allocation processes of existing players encourages them to allocate their efforts where they can maximize existing profits and minimize risk to the existing business – hence an innovation that could be disruptive is one they will always shy away from. As a result that leaves the field open to

new entrants to the market who can, if they are shrewd enough, bury the existing players with a disruptive strategy.

IGNORING DISRUPTIVE INNOVATION IS NOT A STRATEGY

Christensen says established players can see these changes coming but are seemingly unable to do anything about it. Yoplait in North America, for example, has been fully aware for years of the success of probiotic dairy around the world and spent considerable time mulling over whether it should launch probiotic dairy products in its home market. It did not. Then Danone arrived with Activia – and within two years it had disrupted Yoplait's strategy, forcing Yoplait into the position of a probiotic maverick and displacing it from the No.1 slot in the US yogurt market. We find it hard to believe that Yoplait will ever regain that position, so thorough has been the disruption to the market caused by Activia (which has soared to over \$250 million (£160 million) in retail sales in just two years).

An example of disruptive innovation at its best can be found on the front page of this issue of *New Nutrition Business*, where we report the US launch of Verb: GoodBelly, a probiotic fruit juice. GoodBelly is a brand that's being masterminded by a team that knows all about how to disrupt the status quo.

Entrepreneur Steve Demos, whose company Next Foods is marketing GoodBelly, made his name by creating the soy milk category in the US, and growing his Silk soy milk brand into the world's biggest organic brand. One of the many disruptive things he did was to transform soy milk from being an unappealing product on the open shelf, found only in health food stores, calling primarily to a niche of people with allergies, to a chilled product sold in a regular milk-style carton, merchandised alongside cow's milk in most supermarkets.

Having made his fortune with one disruptive innovation, Demos believes he has fastened on another. The ProViva brand of probiotic fruit juice was a disruptive innovation when it was first launched in Sweden in 1994, offering all the benefits of probiotics and of fruit without any of the negatives of dairy. It has grown to be a main-market brand in Sweden, with retail sales of \$52 million (\$81 million) in 2007 – up 35% on 2006. Bearing in mind that Sweden has a population of just 9.1 million, were GoodBelly to achieve a similar degree of penetration in the US market it would be a \$2.5 billion (£1.4 billion) brand.

Demos figured out this opportunity for himself. He and his team had enough experience and insight to know that there is no point in anyone now launching a new probiotic dairy product. That market is



A disruptive innovation that will create a new category debuts in America.

NEW NUTRITION BUSINESS
www.new-nutrition.com

EDITORIAL

APRIL 2008

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already established and well-guarded. They chose instead to create a new category.

An article published last year in the Harvard Business Review, titled "Strategies to Crack Well-Guarded Markets", underscores the importance of new category creation.

Successful new market entrants, say the authors Bryce and Dyer, "don't engage in frontal attack, because market leaders... will stop them in their tracks with price wars, ad blitzes... and other retaliatory tactics". One of the examples they give is a comparison of the performance of Red Bull with Virgin Cola. The latter staged a head-on assault on the US cola market – a stronghold held by Coke and Pepsi – with ad blitzes and comparable pricing but never secured more than 1% of that market.

Red Bull, on the other hand, entered the US with a niche product, in innovative and entirely new packaging, priced at twice the price of any regular soft drink and distributed (at first) only through bars and convenience stores. The company did not use advertising blitzes, and instead relied initially on sampling. The reward for this unconventional approach was that Red Bull was able to create a new category and a loyal following from which to move into the mainstream and build a brand with over \$700 million (\$520 million) in US retail sales – a 65% market share of the energy drink category – just 8 years after its

launch. It remains the largest market share to this day.

Demos has the advantage of deploying a proven business model for a disruptive innovation – with the same team that built Silk – that will ensure that GoodBelly becomes a success, and it will become the largest probiotic juice brand, with all others who follow set to be undifferentiated mavericks.

Established juice players such as PepsiCo's Naked and Tropicana brands and Coca-Cola's Minute Maid and Odwalla brands will not be able to compete – because although they will have watched this innovation coming and known of its possibilities from its success in Sweden, they chose to do nothing until it was too late – just as Christensen foresees instead, a new company (Next Foods) is entering the market with a new brand (GoodBelly) that will disrupt the status quo and create a new category, which it will then proceed to dominate.

In Europe the success of ProViva has been widely known for years – so the failure of any of the existing probiotic dairy players, or juice companies, to adopt this disruptive strategy is all the more striking. Now there's an equal chance that someone new will enter the market and do so soon, with the splash GoodBelly is currently making in the US.

DISRUPTIVE STRATEGY ALL ALONG THE SUPPLY CHAIN

While we have so far talked only about brands, it's worth remembering that it was science and technology that made the disruptive innovation of probiotic juice a possibility.

Probi AB, the Swedish science-based company that is the supplier of the active ingredient in both GoodBelly and ProViva (the probiotic bacteria *L. plantarum* 299) is the seedbed from which this particular disruptive innovation has sprung. Probi first isolated its bacteria, which is rare in being a non-dairy plant-sourced probiotic, back in the early 1990s and worked in collaboration with its local Swedish partner – Sidas Dairy – to create ProViva juice. Probi has since then been working doggedly to widen and deepen the scientific research into *L. plantarum* 299; and to commercialize the concept more widely, with ProViva as the success model.

Probi's founder, serial entrepreneur Kaj Varemam, who was interviewed by *NVB* back in 1999, understands very well the key to success that so many science-based businesses overlook – that innovation has nothing to do

with the number of patents you have; the successful commercialization of invention is all that counts. And in a food and beverage market dominated by me-too, the best opportunity that a science-based ingredient company can give its partner is not an ingredient that will result in an incrementally different product that looks like all the others on the shelf, but an ingredient that offers the opportunity for disruptive, new category-creating innovation.

INNOVATION IN THE DNA

Collectively, food and beverage companies spend thousands of hours and millions of dollars on compliance in an attempt to create innovations. Such investment is largely wasted. Too often such processes produce me-too's that seem innovative to their creators but aren't innovative in the eyes of the consumer, nor do they improve the consumer's lifestyle, or create a new consumption occasion.

Innovation is about people. You cannot make a group of managers innovative. Innovation is in the DNA, it cannot be created by systems or imposed on people who don't have the skills or aptitude. Many of the great entrepreneurs of our industry are people who would have never been heard of had they stayed in

The world's first probiotic juice. A disruptive innovation and a main-market success, the brand is still growing at 35% per annum 14 years after it was launched.



Silk was a disruptive innovation that created a new category and became the world's biggest organic brand.

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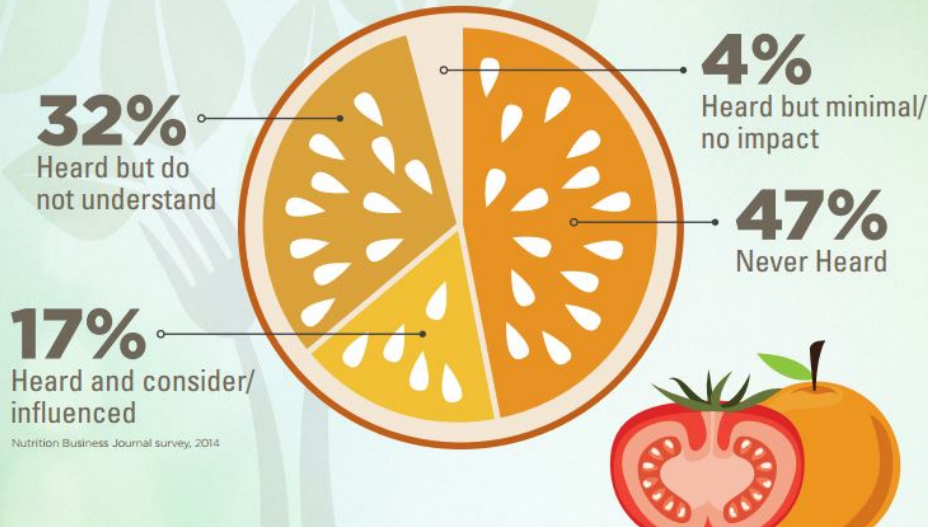
Las primeras innovaciones disruptivas casi olvidadas: “Clean labels”

FUNCTIONAL INGREDIENTS **engredea**
Ingredients and Innovation

What Is Clean Label?

A primer for suppliers and manufacturers

Are Consumers Aware of the Term “Clean Label”



Las primeras innovaciones disruptivas casi olvidadas: Avals de confianza



Las primeras innovaciones disruptivas casi olvidadas: Adaptación al nuevo modelo familiar



Las primeras innovaciones disruptivas casi olvidadas: Alimentos “respirables”



Las primeras innovaciones disruptivas casi olvidadas: “Gastronomía molecular”



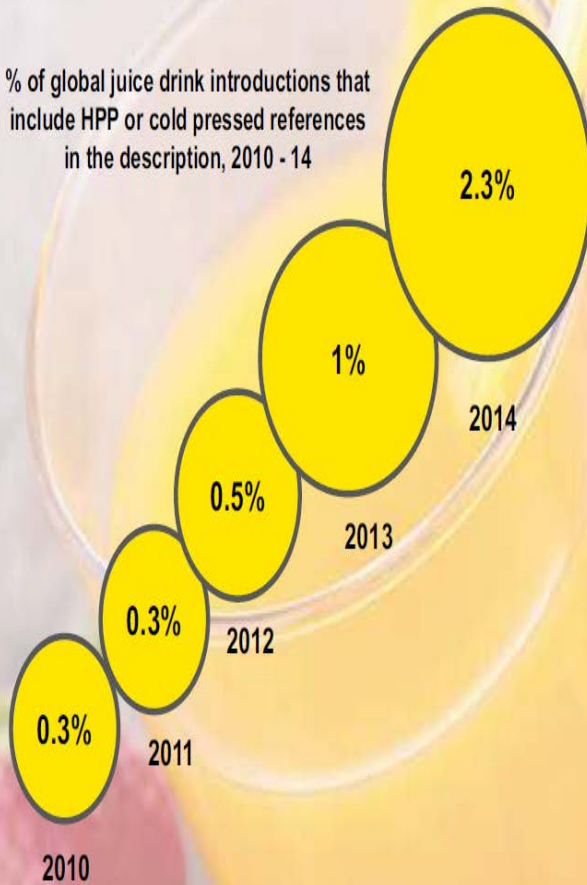
Las primeras innovaciones disruptivas casi olvidadas: Reducción de desperdicios



Las primeras innovaciones disruptivas casi olvidadas: HPP

Cold pressed/high pressure processing breathes life into the juice market

% of global juice drink introductions that include HPP or cold pressed references in the description, 2010 - 14



Cold pressed delivers on no additives/preservative claim

Cold pressed wins on flavour and nutrition angle

Cold pressed adds a premium element to products



Las primeras innovaciones disruptivas casi olvidadas: Innovaciones revolucionarias

'Breakthrough innovation' sees PepsiCo launch Tropicana juices with tea

By Ben Bouckley , 24-Apr-2012
Last updated on 25-Apr-2012 at 17:06 GMT



Related tags: Tropicana, Trop50, PepsiCo

PepsiCo brand Tropicana has launched two new US Trop50 varieties, including an innovative juice with tea mix and a red orange juice with 50% less sugar and calories.

Innovaciones disruptivas de “bajo nivel”



Innovaciones disruptivas de “nuevo mercado”



Innovaciones disruptivas de “nuevo mercado”



Innovaciones disruptivas de “nuevo mercado”



Innovaciones disruptivas de “nuevo mercado”



Innovaciones disruptivas de “nuevo mercado”



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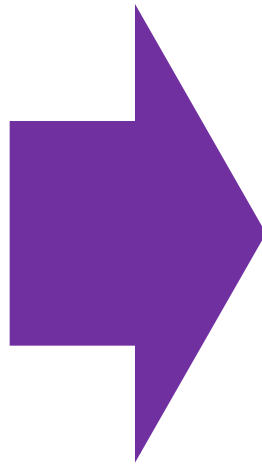
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Innovaciones disruptivas de “nueva ciencia aplicada”



Innovaciones disruptivas de “nuevos free-from”



La evolución de los “Fructose-friendly” para reducir síntomas de IBS



Innovaciones disruptivas de “búsqueda de nuevos consumidores”



Innovaciones disruptivas de “búsqueda de nuevos consumidores”



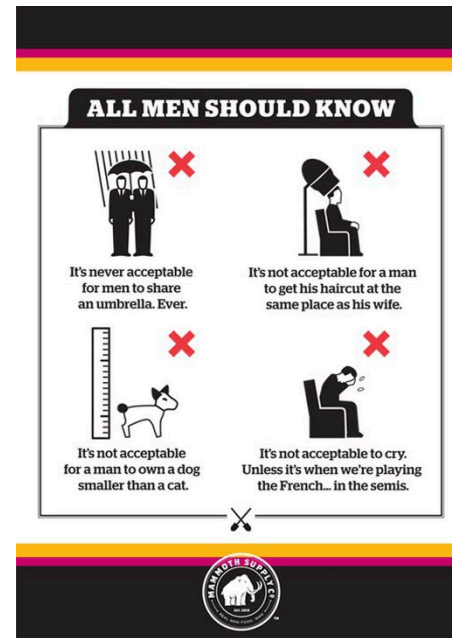
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↓ ALL MEN SHOULD KNOW




ALL MEN SHOULD KNOW

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It's not acceptable for a man to get his haircut at the same place as his wife.

It's not acceptable for a man to own a dog smaller than a cat.

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Innovaciones disruptivas de “snackificación”

IRI: Portable nutrition, other ‘targeted’ innovation driving F&B brands, product launches

By Maggie Hennessy , 28-Mar-2014

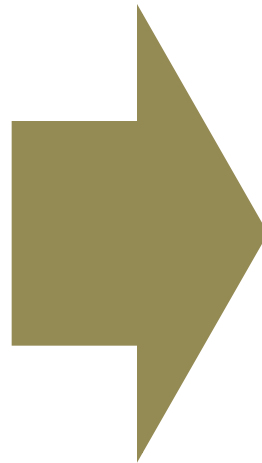


IRI's Viamari: "A quarter of consumers eat four or five mini meals throughout day, rather than following the traditional, three square meals a day pattern, which is helping yogurts."

Related tags: Top new products, IRI, Greek yogurt, Healthy snacks, Clean label

Top brands and new product launches are reaching increasingly segmented consumer groups through targeted, measured innovation, according to market research firm IRI Inc., which released its “New Product Pacesetters” and “Growth Leaders in CPGs” survey results this month.

Innovaciones disruptivas de “búsqueda de nuevas ocasiones”



Innovaciones disruptivas de “demandas no atendidas”

Coca-Cola: ‘A third of beverage industry growth could come from disruptive brands in categories that do not exist today’

By Elaine WATSON , 26-Mar-2013
Last updated on 26-Mar-2013 at 13:47 GMT

1 comment



Coca-Cola's VEB team, which first invested in ZICO Coconut water in 2009, increased its share in April 2012 and Coca-Cola now has a controlling interest in the brand

Innovaciones disruptivas de “super-nutrición para el trabajo”



Innovaciones disruptivas de “búsqueda de nuevas texturas”



Innovaciones disruptivas de “búsqueda de nuevos sabores”



Innovaciones disruptivas de “búsqueda de conceptos más accesibles”



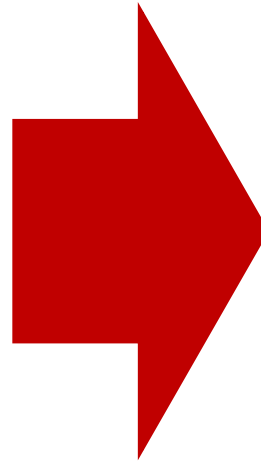
Innovaciones disruptivas de “bondad inherente”



Innovaciones disruptivas de “Superalimentos”



Innovaciones disruptivas para “ocupar más parte del momento de uso”



Innovaciones disruptivas de “búsqueda de conceptos más naturales”

Honest Tea co-founder Seth Goldman on disruptive innovation: We can take the Honest brand beyond the beverages aisle



By Elaine Watson+

18-Jun-2014

Last updated on 11-Jul-2014 at 00:26 GMT



Seth Goldman on democratizing organics: 'We never set out to sell healthy drinks just to healthy people. Organics need to be accessible.'



Innovaciones disruptivas de “búsqueda de conceptos más naturales”

Diamond Food's expands healthy, natural snack offerings under Kettle and nut brands



By Elizabeth Crawford

10-Jun-2015

Last updated on 10-Jun-2015 at 14:18 GMT



Related tags: Diamond Food's, Nuts, Protein, Popcorn, Kettle, Pop Secret

Efforts by Emerald Premium Snack- and Kettle brand chip-maker Diamond Food's Inc. to meet consumer demand for healthy, natural and convenient snacks are paying off with sales climbing 2.5% to \$662.4 million in the first three-quarters of the year, company executives report.



Innovaciones disruptivas de “envases que transmiten innovación”



reddot design award
winner 2011



Innovaciones disruptivas de “envases para ancianos”



Innovaciones disruptivas para “transformar complementos en alimentos”

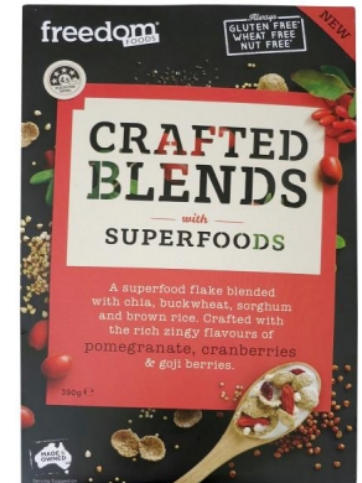
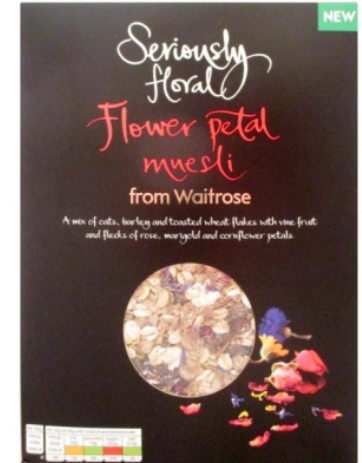
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Innovaciones disruptivas en marketing (la 4ª idea más disruptiva del mundo)



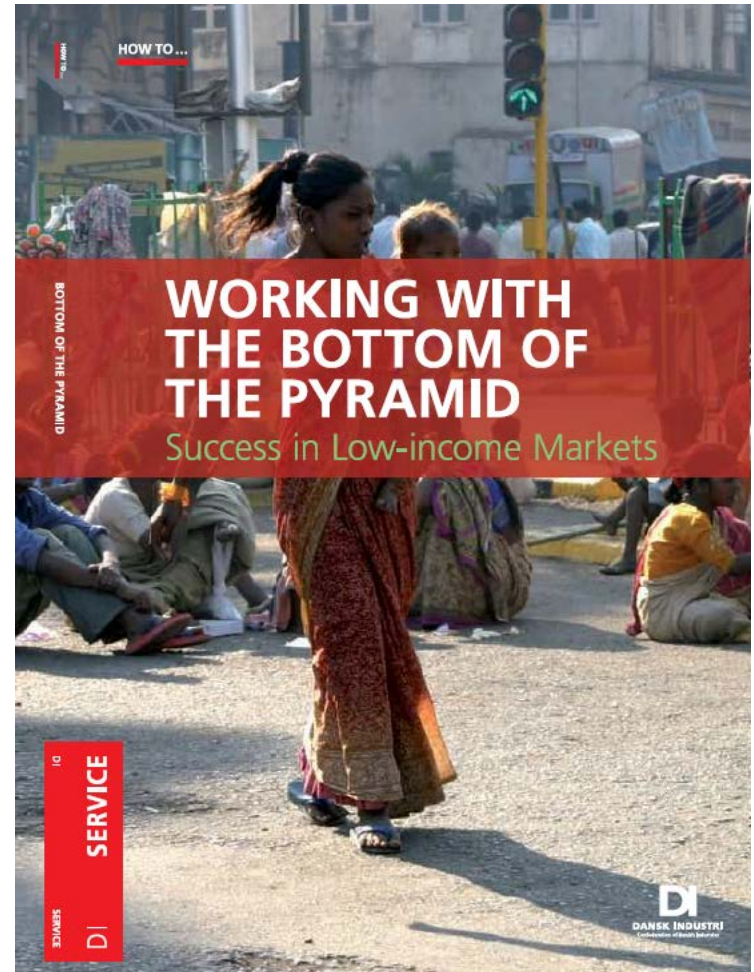
Innovaciones disruptivas en marketing (Salud para cereales de desayuno)



Innovaciones disruptivas en marketing (Indulgencia)



Disrupciones en “modelos de negocio”: BOP

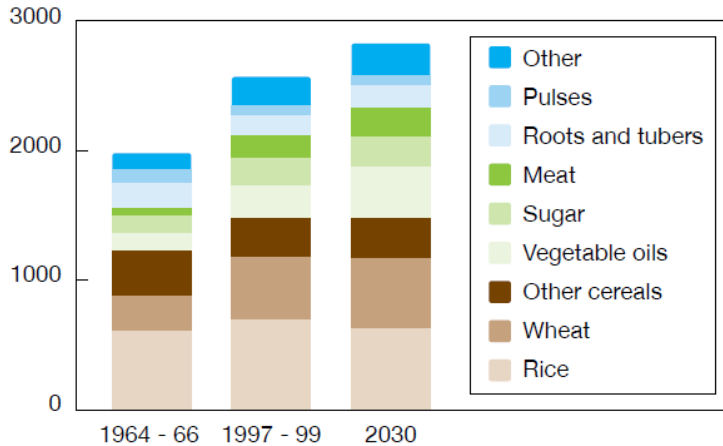


Disrupciones Futuras: Carne en laboratorio



Diversifying diets in developing countries include more meat.

Kilocalories per capita/day

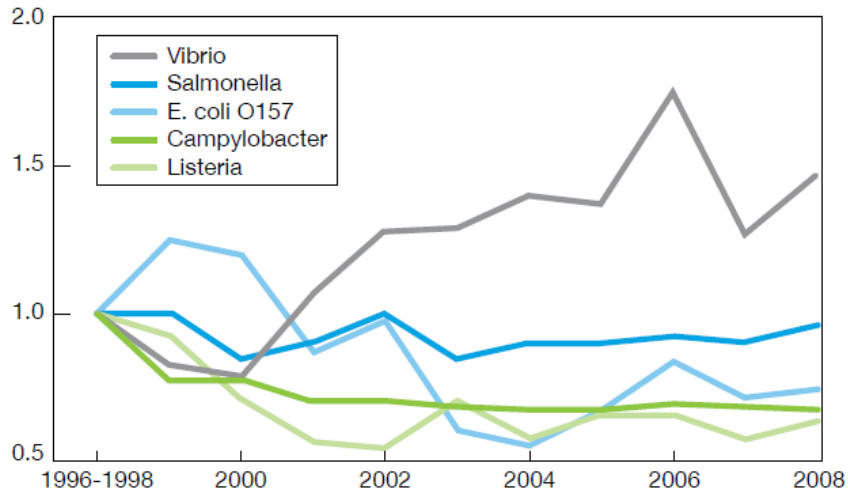


Source: FAO 2003; based on a chart drawn by Hugo Ahlenius, Nordpil, <http://maps.grida.no/go/graphic/dietary-change-in-developing-countries-1964-2030>

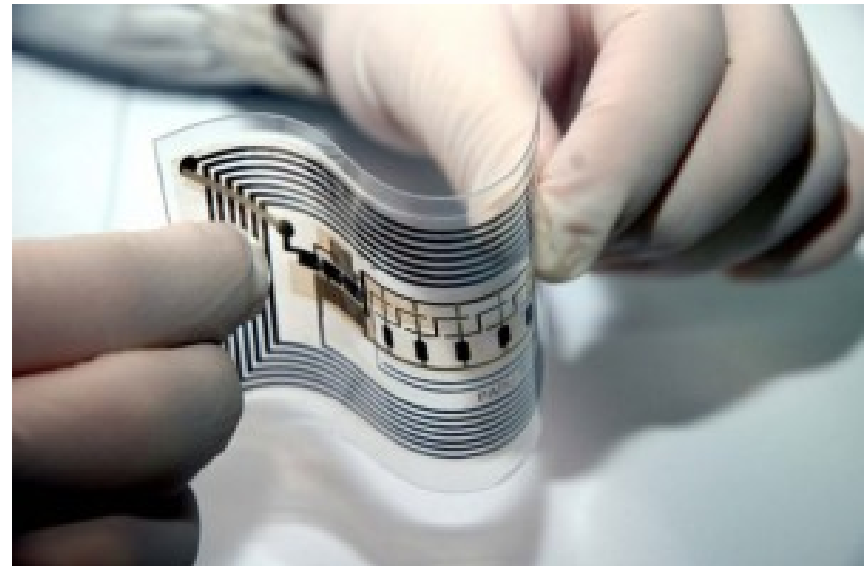
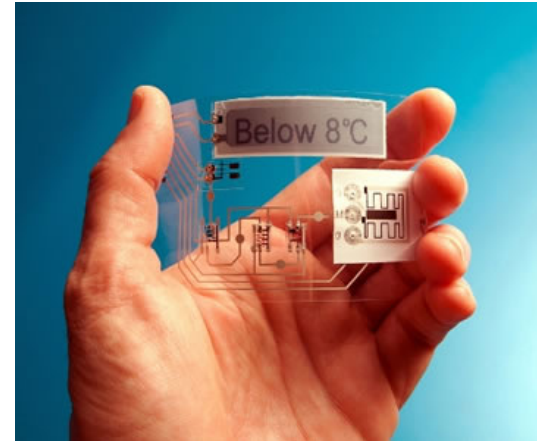


Disrupciones Futuras: Envases inteligentes

Incidence of most food-borne illnesses is declining, but public anxiety is not.



Source: "Foodborne Diseases Active Surveillance Network, United States," *New York Times*



Disrupciones Futuras: Nuevos sistemas de liberación



Disrupciones Futuras: Llegaremos a comer insectos?



Disrupciones Futuras: Comeremos algas?



LO QUE HAY QUE VER »

'Kombucha', la extraña bebida a base de bacterias que conquista Los Angeles

Este té fermentado tiene pinta de mejunje intragable pero es el nuevo objeto de deseo para los 'hipster' de la costa Oeste. Dicen que cura enfermedades, pero no es barato... ¿Cuánto tardará en llegar a España?

ROCÍO MESA






En Orsa & Winston (Los Ángeles) experimentan con todo tipo de bebidas fermentadas. / Kristin Linney

Disrupciones Futuras: Nutrición personalizada

DIET BY DNA

Interest in natural and 'getting back to basics' has boosted ancient grains and superfoods, fostering a principle that age-old staples are better than today's manufactured options. Interest in historical ingredients suggests that people could make efforts to unlock the keys to their personal physiology and design diets by connecting with their own ancestry or genetic make-up.

 Established  Mainstreaming  Emerging



Alternatives Everywhere

Artificial: Public Enemy No. 1

Eco Is the New Reality

From Inside-Out

For Every Body

Based on a True Story

e-Revolution: From Carts to Clicks

Diet by DNA

Good Enough to Tweet

Table for One

Fat Sheds Stigma

Eat With Your Eyes

Disrupciones Futuras: Perfiles nutricionales

Perfiles nutricionales:
Intencionalidad científica versus
impacto real en salud pública

2017-2018
PERIODO 2017-2018
INFORME
CIENTÍFICO-
TÉCNICO FINUT

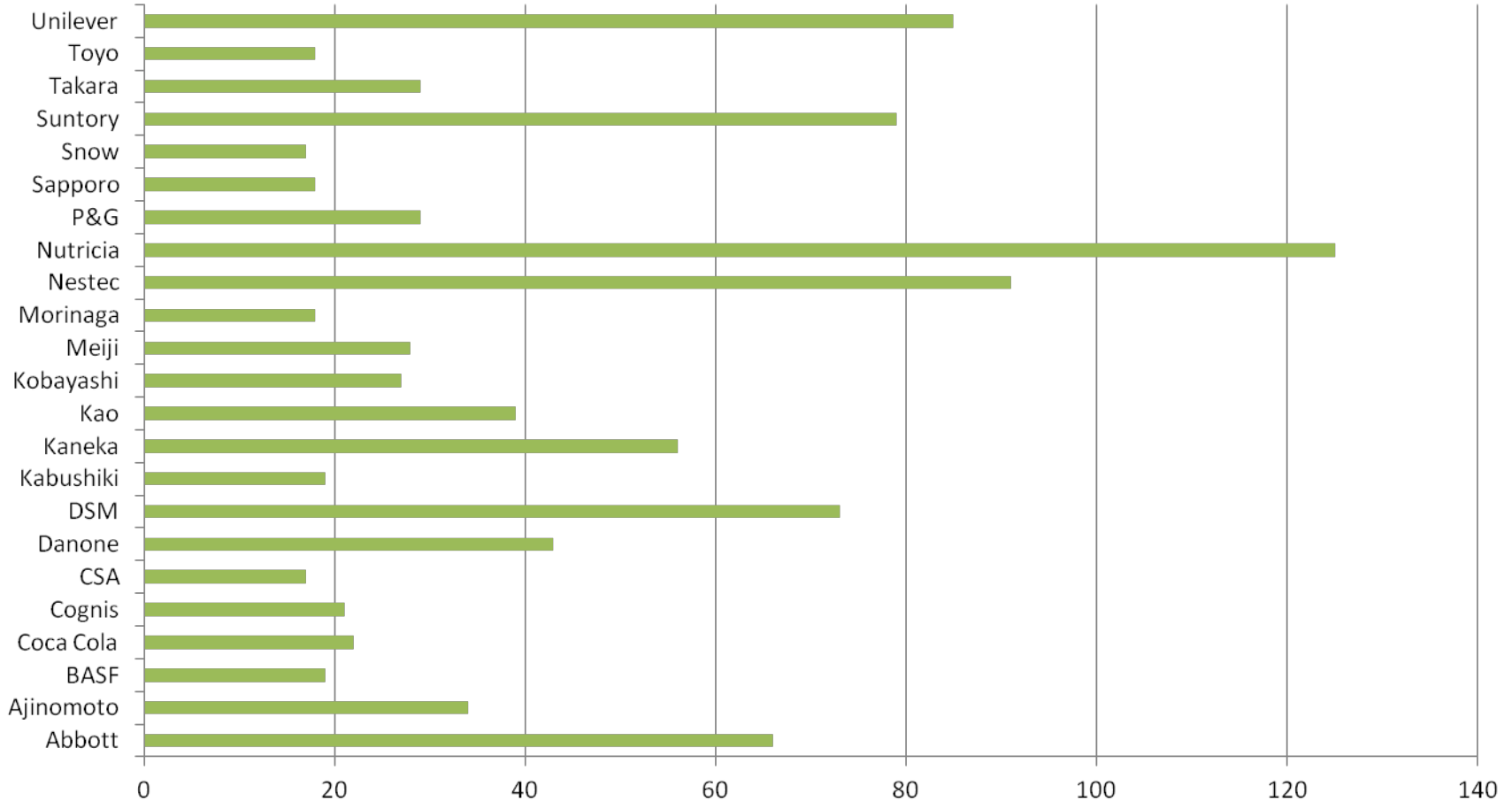
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FINUT
Federación Interamericana
de Nutrición

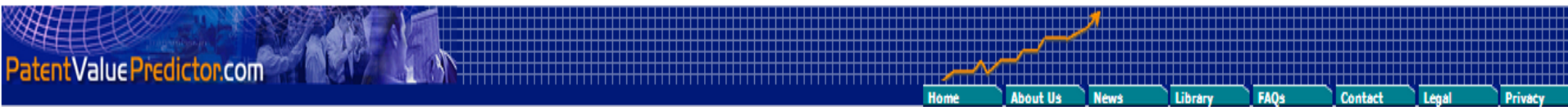
País/autoridad	Tipo de perfil	Enfoque utilizado en el cálculo	Cantidad de referencia	Nutrientes sujetos a un nivel máximo en la comida
Europa (WHO Regional Office Europe, 2015)	Grupos de Alimentos (n=17)	Valor umbral límite	Peso y volumen (no exceder 100g ó ml)	Energía, grasa total, AGS, azúcares totales, azúcares añadidas, sal, edulcorantes sin calorías
Francia (AFFSA, 2008)	Generalizado	Puntuación	Energía, y peso	AGS, AGT y azúcares
Suecia (SNF, 2005)	Basado en grupos	Valor umbral límite	100 g (peso %)	Grasa total, sodio y azúcar añadido
Bélgica (NHFP, 2007)	Basado en grupos	Valor umbral límite	Por ración	Energía
Latinoamérica y el Caribe (OPS, 2016)	Generalizado	Valor umbral límite	Energía	Sodio (≥ 1 mg/kcal), Azúcares libres ($\geq 10\%$ de energía), edulcorantes (cualquier cantidad), Grasa total ($\geq 30\%$ de energía), AGS ($\geq 10\%$ de energía), AGT ($\geq 1\%$ de energía)
Canada (Health Canada; 2001)	Basado en grupos	Valor umbral límite		AGS
USA (FDA, 2002)	Generalizado	Valor umbral límite	Por ración	Grasa total (< 13 g), AGS (< 4 g), Colesterol (< 60 mg), Sodio (< 480 mg) por ración
México (Secretaría de H. y Crédito Público y SAT, 2013)	Generalizado y basado en grupos	Valor umbral límite	Energía y peso	Energía (≤ 275 kcal/100 g) Azúcares libres (cualquier cantidad en bebidas),
Perú (Presidencia de la Rep. 2015)	Generalizado	Valor umbral límite	Peso y volumen	Azúcar (≥ 2.5 g/100 ml ó ≥ 5 g/100 g), Sal (≥ 300 mg/100 ml ó 100g), Grasa Saturada (≥ 75 g/100 ml ó ≥ 1.5 g/100 g)
Bolivia (Asamblea Legislativa Plurinacional, 2015)	Generalizado	Valor umbral límite, escala de colores (semáforo)	Peso y Volumen	Concentración Baja: AGS (≤ 1.5 g/100g ó 0,75 g/100 ml), Azúcar añadida (≤ 5 g/100 g ó 2.5g/100 ml), Sodio (≤ 120 mg/100g ó 100 ml) Concentración Muy Alta: AGS (≥ 10 g/100g ó 5g/100 mL) Azúcar añadida (≥ 15 g /100g ó 7.5g /100 ml), Sodio ≥ 600 mg/100 g ó 100ml
Chile (Minsal 2012)	Generalizado	Valor umbral límite	Por porción	Energía (≥ 200 kcal), Sodio (≥ 300 mg), Azúcares totales (≥ 18 g), Grasas (≥ 3 g)
Australia/ Nueva Zelanda (FSANZ; 2001)	Generalizado	Valor umbral límite	Por ración (para productos específicos por 100g o 100 kJ)	Grasa total (< 14 g), SFA (< 5 g), Sodio (< 500 mg)

Más allá de la innovación: Patentes WIPO por empresa innovadora



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<http://www.patentvaluepredictor.com/home.asp?Unique=1013201251011>



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DESCRIPTION OF SERVICES

Automated Patent Valuations - Patent valuation reports emailed to you seconds after you order. An automated service where you specify a patent and then receive our model's determination of the - - *VALUE OF* - - the patent, and the - - *SIZE OF THE MARKET* - - (in sales per year) protected by the patent.

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- INVESTMENT DECISIONS - COMPARE PATENT AND VALUATIONS

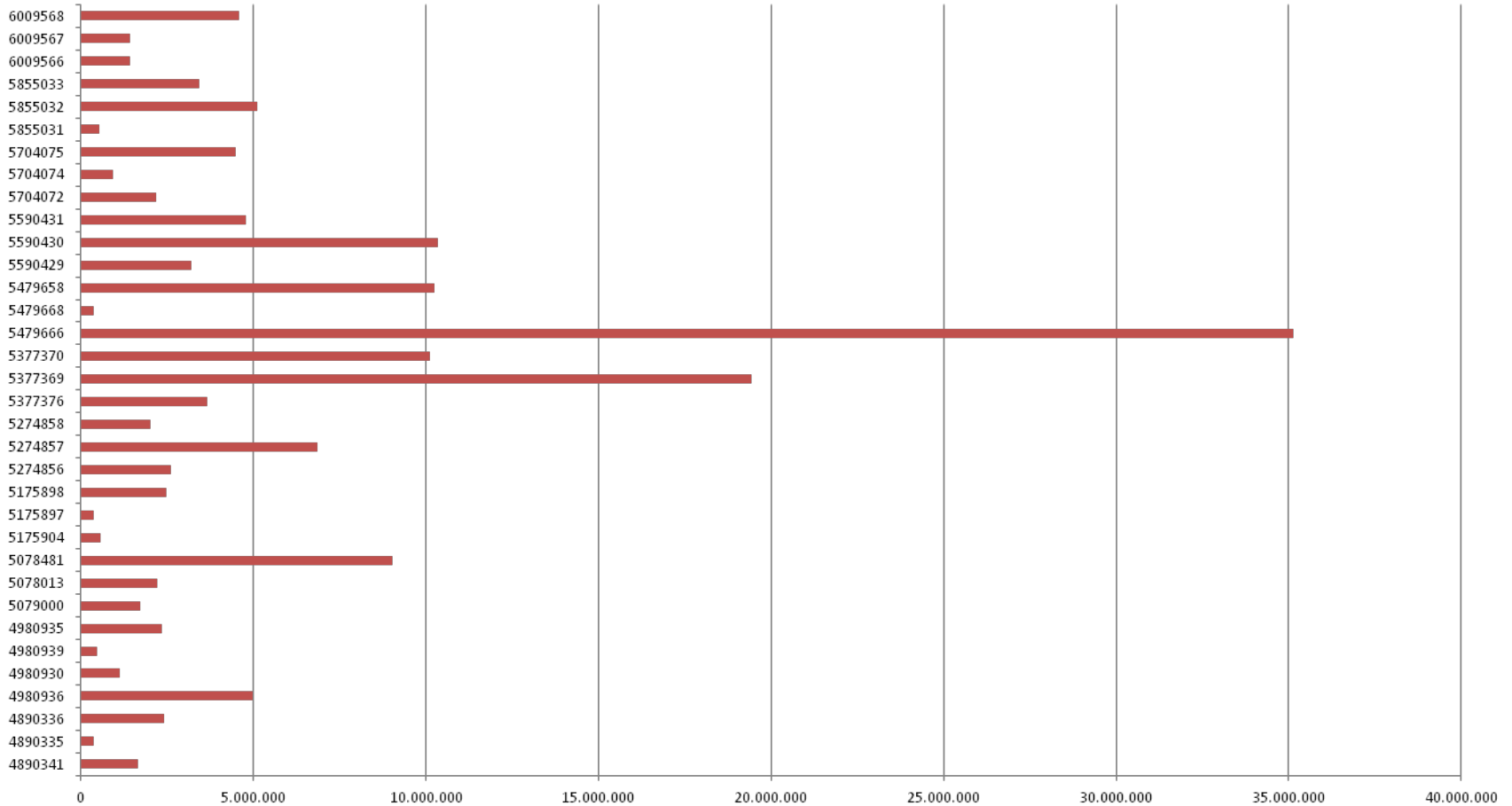
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Valor estimado de patentes internacionales en alimentación



¿Por qué las empresas líderes no apuestan por la innovación disruptiva?

Debido a los bajos márgenes de beneficio.

Porque emergen inicialmente en mercados minoritarios.

Sus clientes preferentes no suelen demandarles ese tipo de productos.

No aportan valor a los productos que las empresas consolidadas ya poseen.

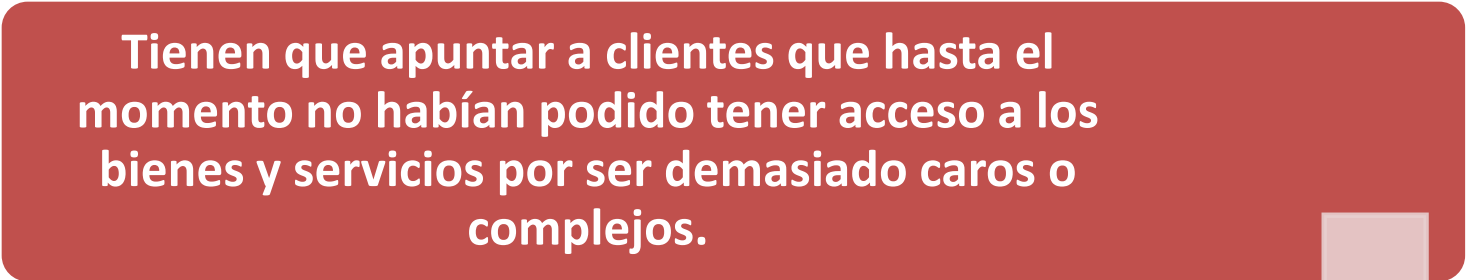
La estructura de costes del modelo de innovaciones disruptivas, de la distribución y de los canales de ventas no les compensa.

Precisarían capacidades diferentes debido a que deberían rediseñar y canalizar los recursos siguiendo estrategias que no dominan.

Por la incertidumbre inherente a la entrada en nuevos mercados.

Características de las innovaciones disruptivas del nuevo mercado

Tienen que apuntar a clientes que hasta el momento no habían podido tener acceso a los bienes y servicios por ser demasiado caros o complejos.



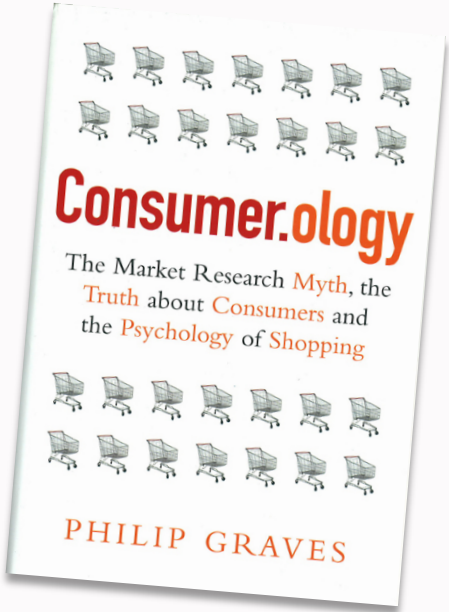
Deben dirigirse a clientes que deseen productos simples.



Deben ayudar a los clientes a hacer más fácil y más efectivo el uso del producto.



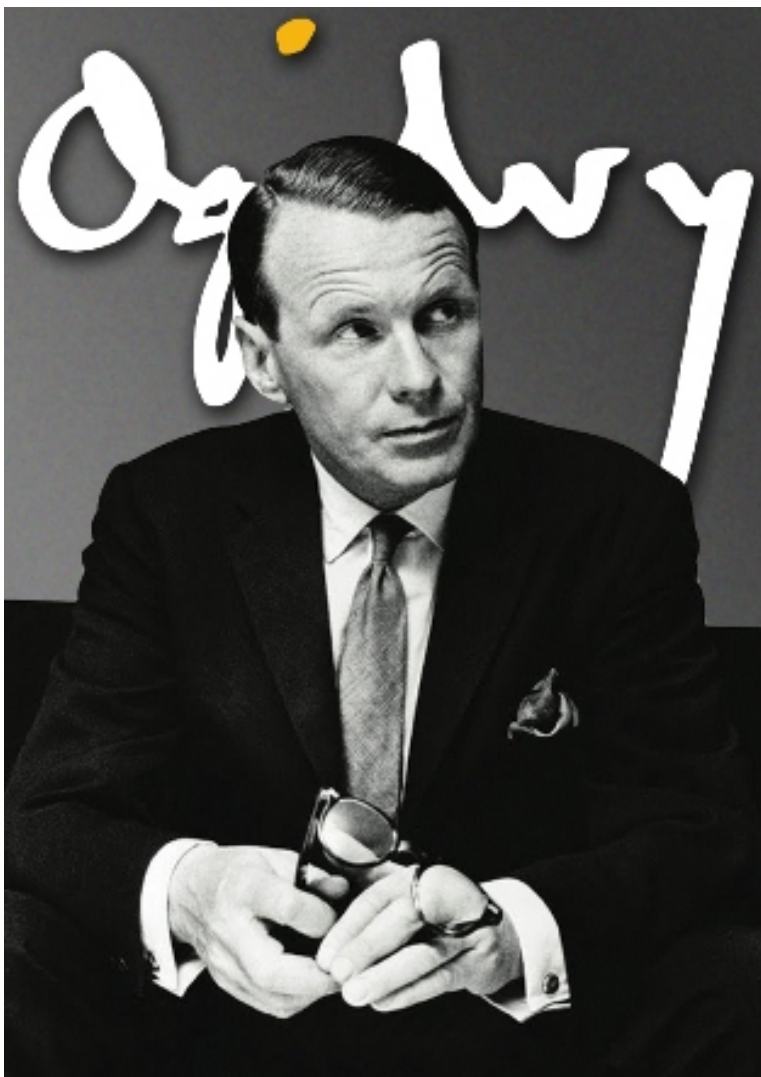
***Neuromarketing como
innovación disruptiva***



Consumer.ology

The Market Research *Myth*, the
Truth about *Consumers* and
the *Psychology* of Shopping

PHILIP GRAVES



"El problema con la investigación de mercado es que la gente no piensa cómo siente, no dice lo que piensa y no hace lo que dice".

¿Por qué?

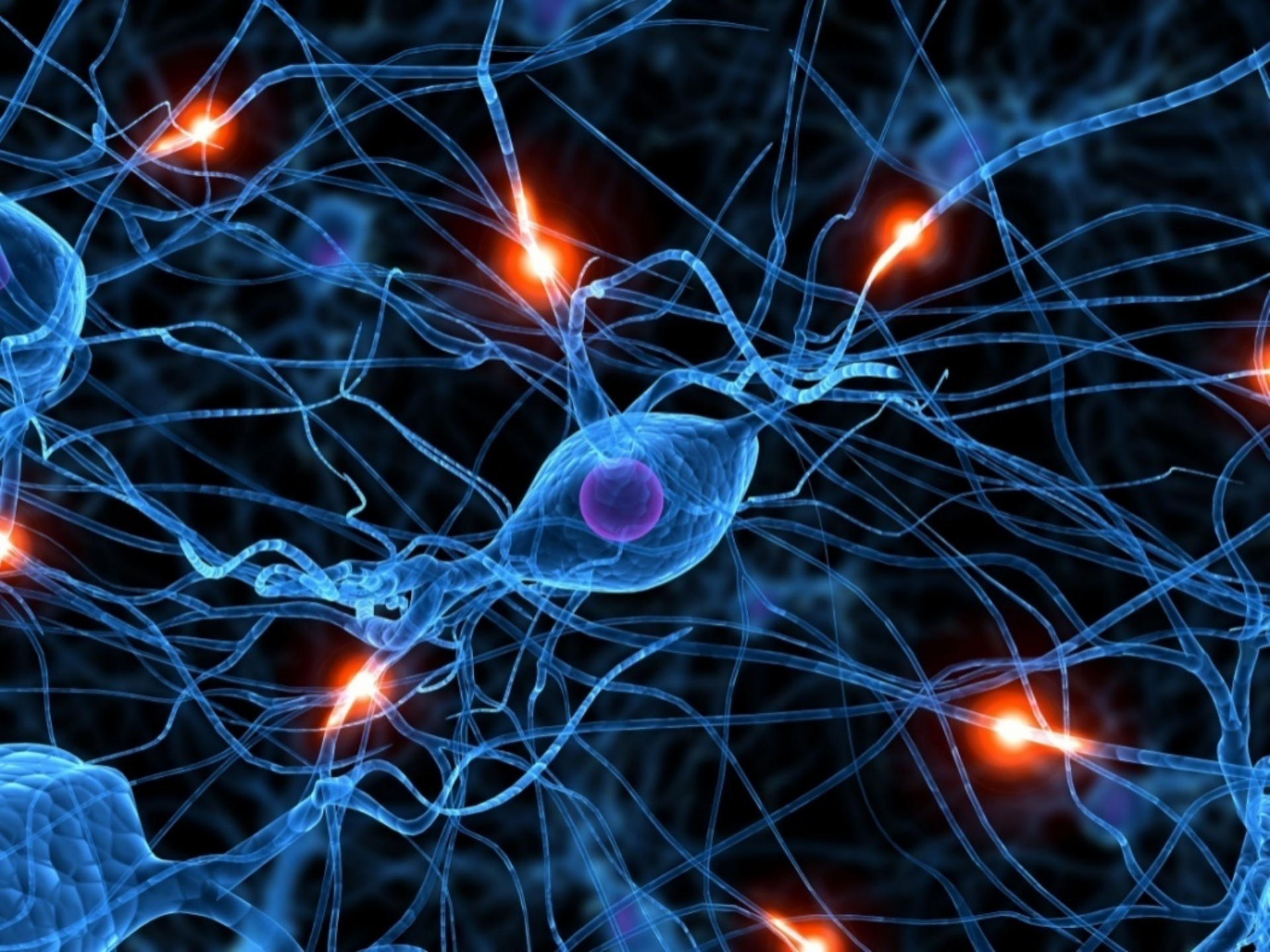
Somos más emocionales de lo que creemos



No siempre tomamos decisiones lógicas



Casi todo lo que ocurre en nuestra mente no está bajo control

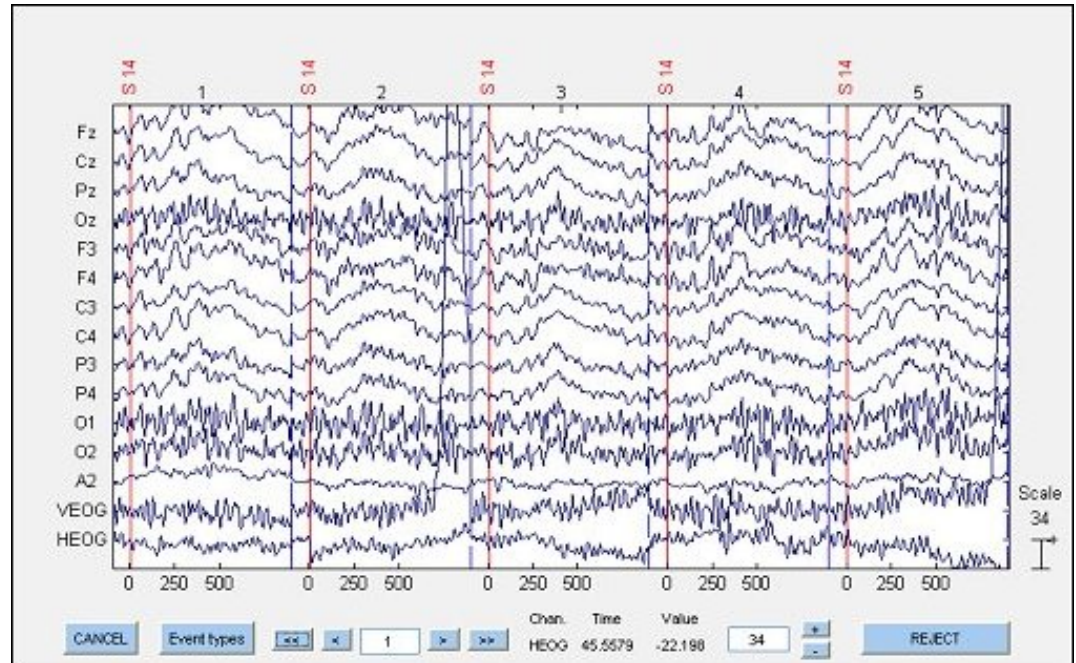




Estudios previos: EEG



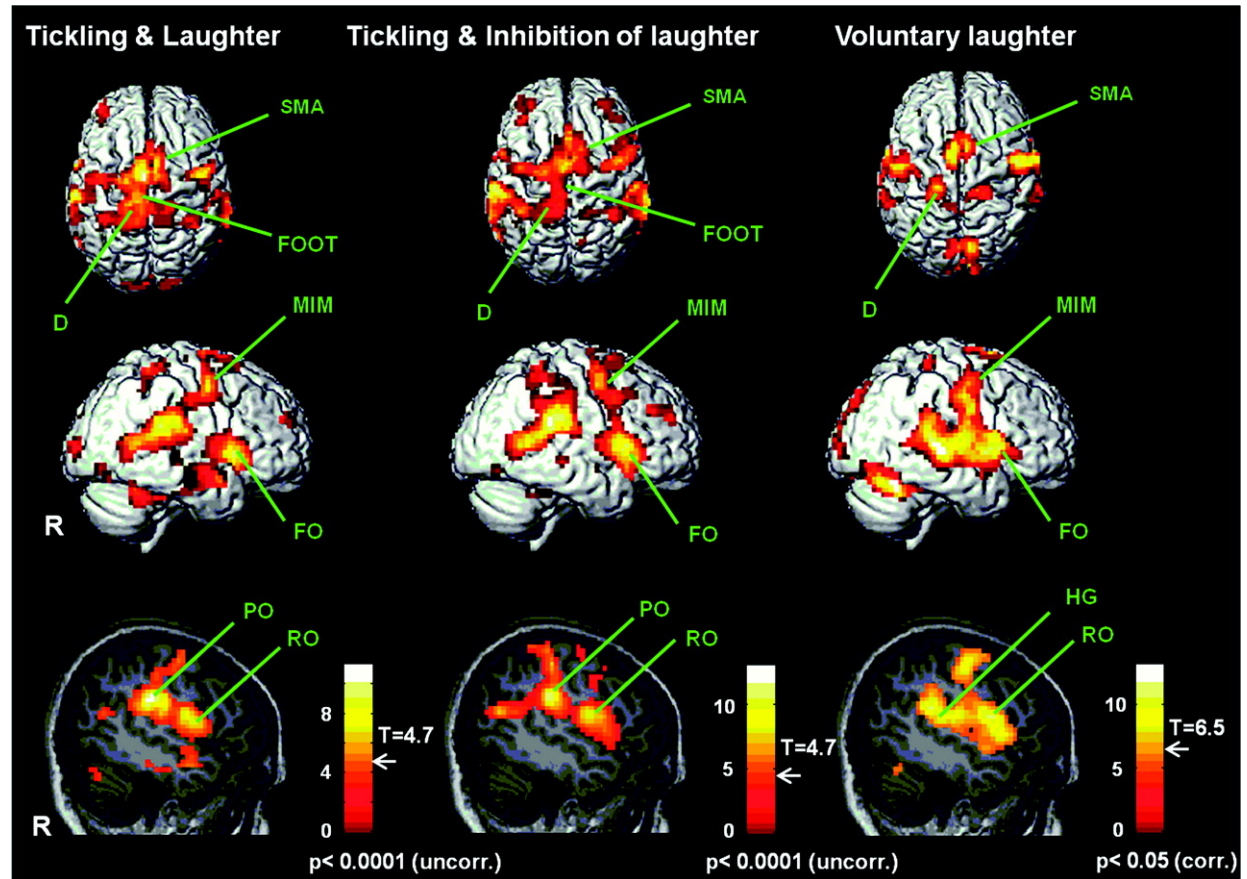
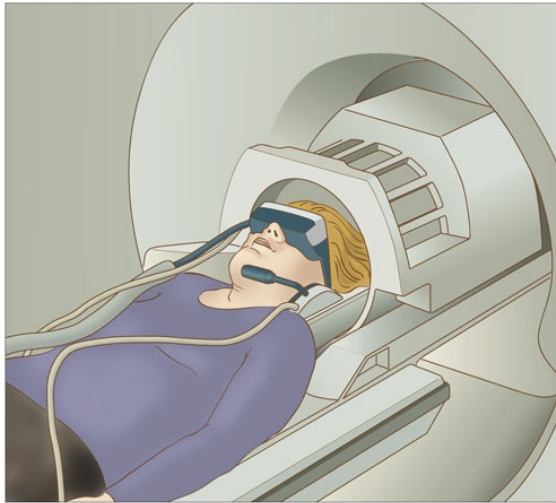
Atención
Emoción
Memoria



Estudios previos: Eye tracking



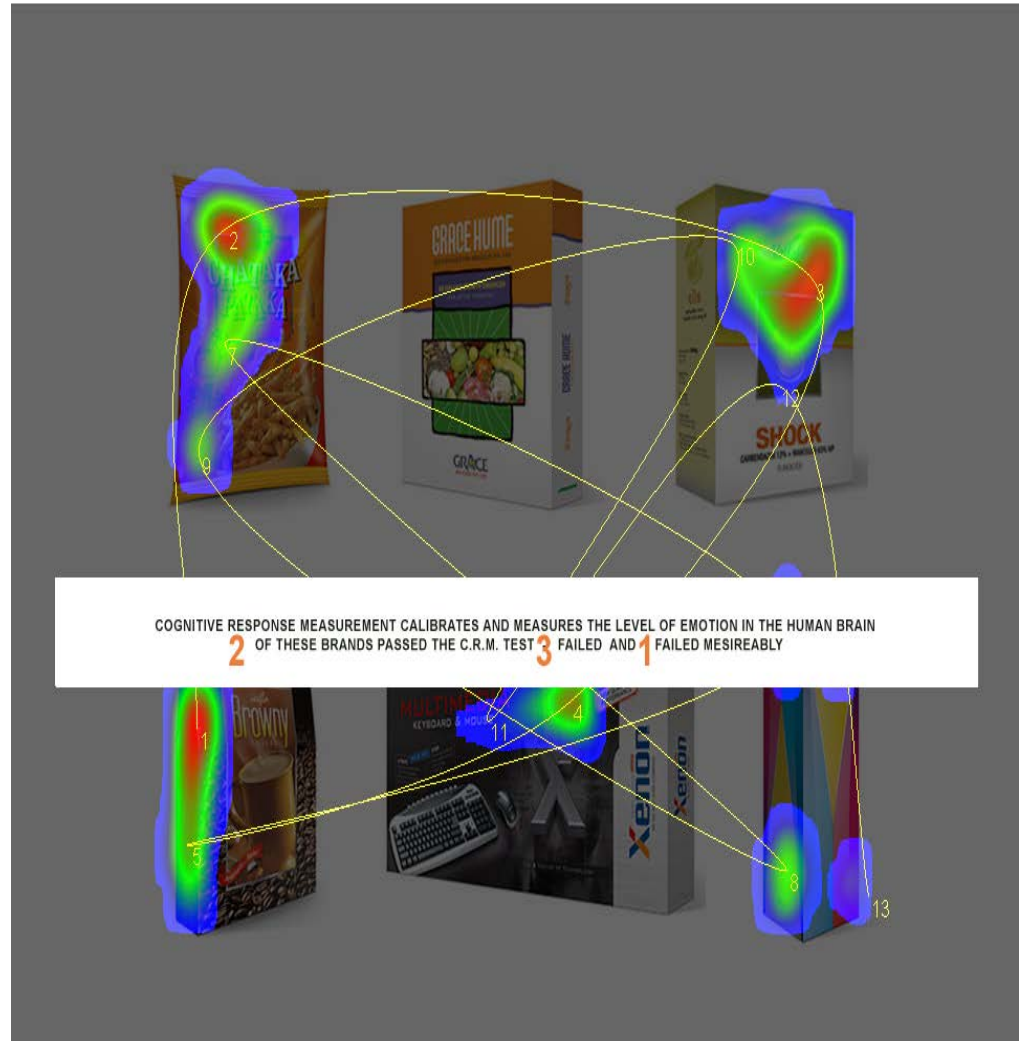
fMRI – functional Magnetic Resonance Imaging



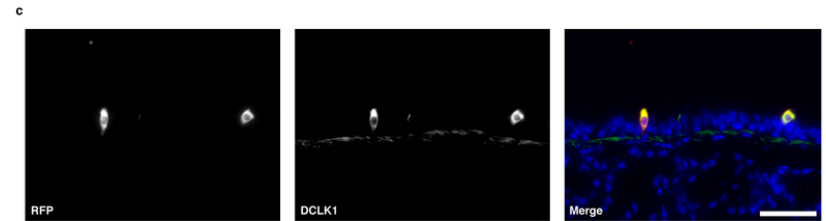
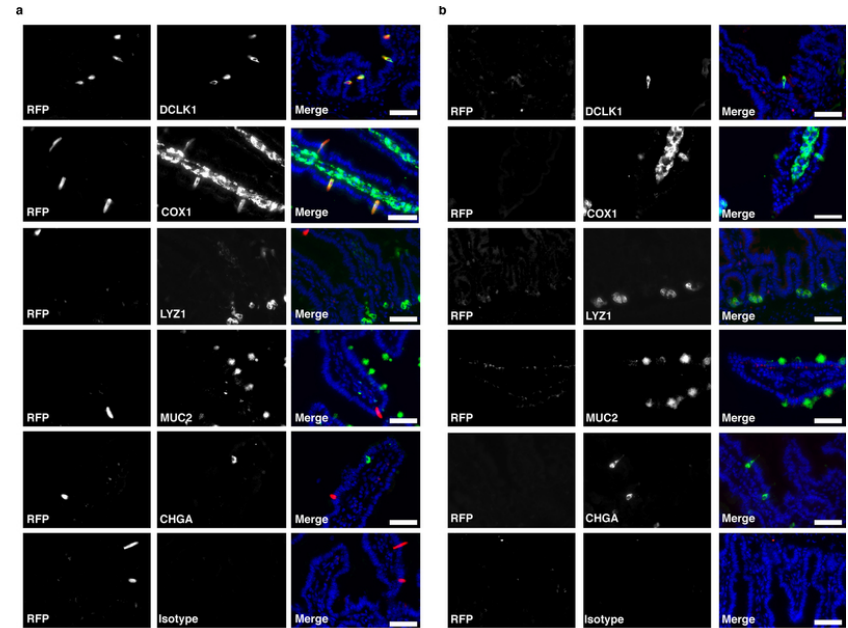
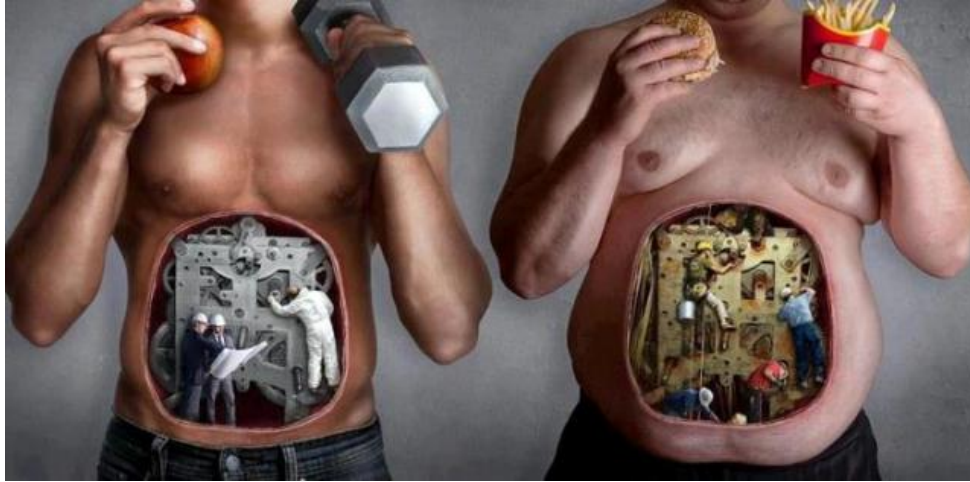
Facial Emotion Encoding



Visual Attention



Gut feeling



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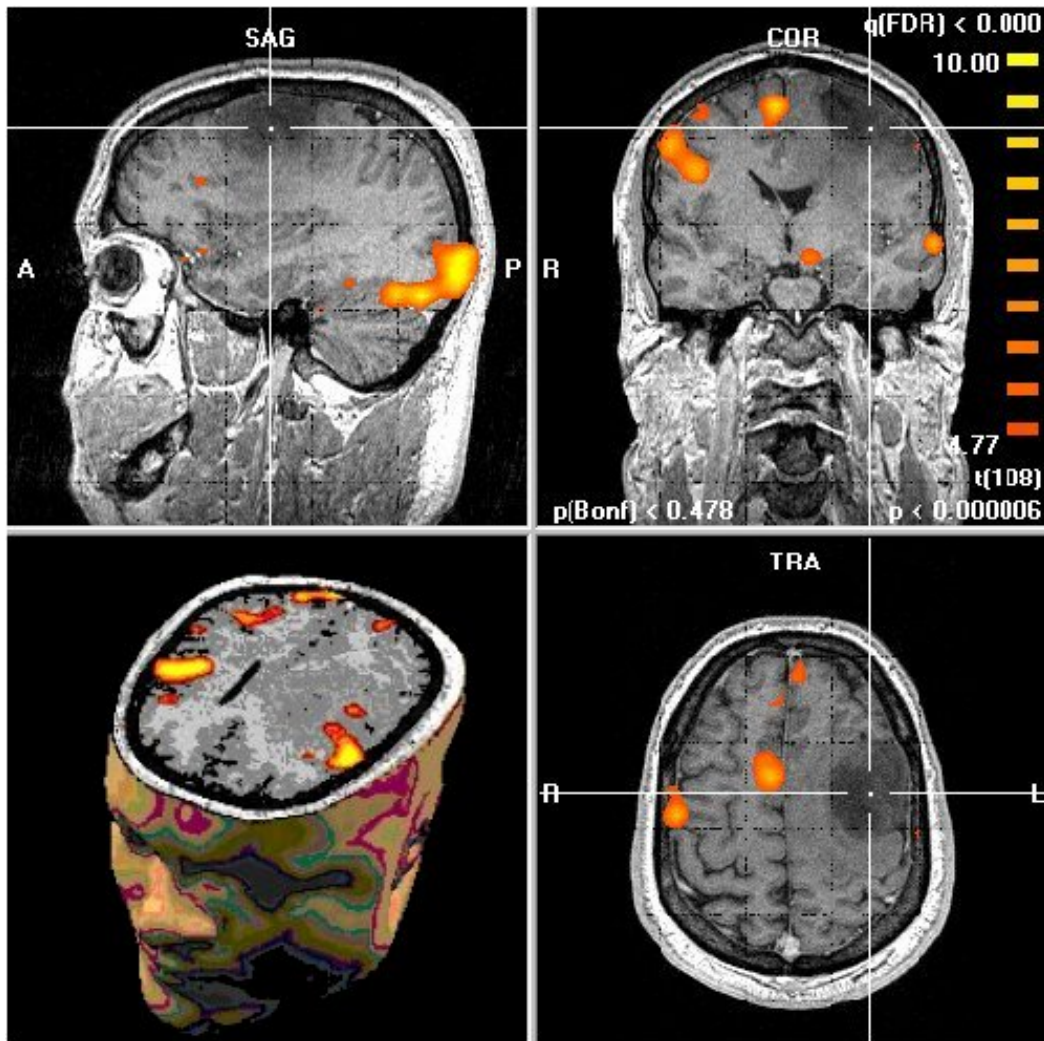
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SEPTEMBER 1, 2003

USEDMagazine.com



Nielsen Buys Innerscope: Is Neuromarketing Going Mainstream?

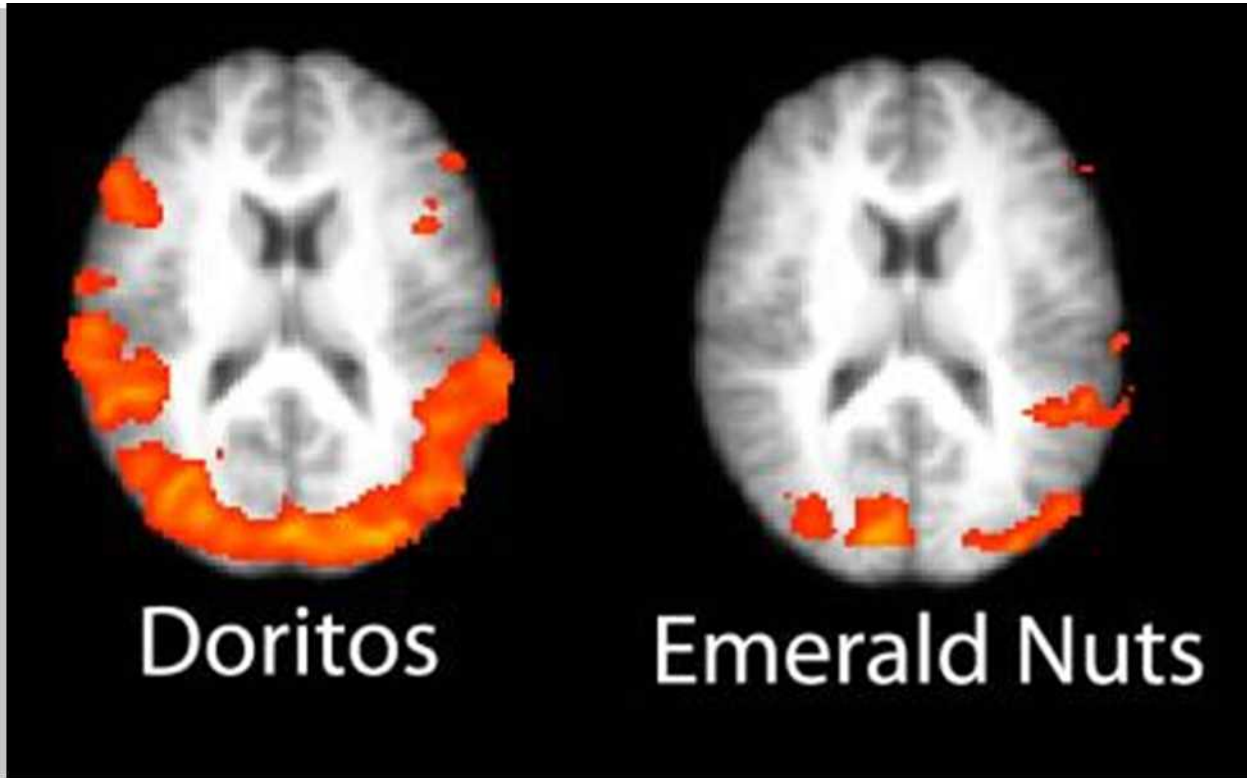
By Ana Iorga

The global market research industry is going through a diversification boom, both in its traditional service offerings and in the introduction of new methodologies and high tech devices to study consumer choice and behavior. Since the emergence of neuromarketing as a research field, some neuromarketing vendors have proclaimed the death of traditional research and presented their neuro-based tools as a panacea that solved all their customers' problems. Traditional research companies, on the other hand, tended to publicly dismiss neuromarketing's claims, if they acknowledged them at all, citing the technology's early stage and a lack of transparency regarding some of the field's data analysis processes.



Why are Doritos the number one snack food of all time?

Doritos Commercial & Brain Scan fMRI



In this side-by-side comparison, the brain is much more engaged while watching the Doritos “Live the Flavor” commercial as compared to the Emerald Nuts ad featuring Robert Goulet. (Photo from FKF Applied Research)

La empresa del Futuro



Consejos para desarrollar iniciativas de innovación disruptiva

1. Localizar nuevos clientes identificando nuevos mercados: a) la innovación disruptiva no debe tomar en consideración a los clientes actuales, y b) hay que captar al no consumidor identificando las necesidades de los futuros clientes que no pueden satisfacer los servicios y productos existentes debido a su precio o dificultad de uso.
2. En un mercado potencialmente disruptivo, los clientes no pueden ser satisfechos mediante el modelo hasta ahora dominante.
3. Las reglas del modelo de negocio y del diseño del producto deben orientarse a los nuevos clientes.
4. Hay que diseñar los productos según las exigencias del nuevo mercado. Es decir, las necesidades de los nuevos clientes deben dictar el modelo de negocio.
5. El negocio disruptivo debe iniciarse a pequeña escala, sin forzarlo a crecer rápidamente, ajustándolo progresivamente al modelo de negocio y al diseño del producto.

Muchas gracias!!

