

CONSUMERS & PROTEIN

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CONSUMERS AND PROTEIN

In our efforts to convert consumer data into meaningful insights, Roquette conducted an online survey on how consumers felt about protein in their diets. Roquette used a 3rd party to conduct the survey of 1,200 consumers in the USA in Q1 2018. The same survey was conducted in Mexico and Canada as well. This summary reviews the consumer information from the United States only.

THE CONTINUED DRIVE FOR PROTEIN

The protein-centric eating and snacking trend continues. Protein is a favorite among all types of consumers across a wide variety of cohorts. People are looking for protein content in nearly every food category - even in indulgent categories like sweets and salty snacks. When asked which categories consumers desire *higher* levels of protein in, they selected yogurt, cheese, breakfast on-the-go, frozen meals and meat alternatives.

When asked about protein content in milk and milk alternatives, Americans ranked the desire for a higher protein containing dairy milk (+8%) more than soy milk (<4%). The number was +6% for nut-based dairy alternatives (like almond, cashew, rice). Overall, the desire for higher protein in a milk or milk alternative beverage is desired.

In terms of awareness of protein sources, whey, soy and “milk” proteins round out the top three. Pea protein had an awareness level in range with protein from casein, buckwheat, hemp, chia and lentil.

PLANT FORWARD

Plant proteins are a booming segment as consumers seek to live more “plant-based lives” and for health benefits. As soy and whey have been mainstays, people seeking a non-allergen source of protein look to other plant-based foods. Plant-based protein used as a functional ingredient grew 92.5% between 2016 and 2017, adding \$58.8 million in sales to reach \$122.4 million (SPINS). About a quarter of adults self-identify as “flexitarian” or “lessitarian” – cutting back on consumption of animal-based products.

A challenge for the plant-based proteins category is to overcome taste issues, and the perception of taste issues. Product developers need to find the right balance of taste and positioning of health benefits adapted to the ideal product types where plant-based varieties will be well received by consumers.

WHAT ABOUT PEA PROTEIN?

A 2017 study from GlobalData Plc illustrated the growing awareness of pea protein, which increased to 47% awareness in 2017 – up from 38% in 2015. While 18% of respondents in 2017 said they did not know what pea protein is, the percentage was 30% only two years before (2015). In the Roquette survey, 20% of consumers said they have tried food and beverage products with pea protein, and nearly half said they would like to try it.

Nearly a third stated they are not interested in trying pea protein, the main reasons being related to anticipation of taste. Food and beverage manufacturers can benefit from carefully positioning pea protein-containing products to focus on taste, and perhaps include interesting or familiar ingredients and flavors to build comfort.

For those who have tried pea protein in some form, we looked at WHY they chose the product and what attributes were important to them. Nearly 20% named PROTEIN CONTENT and PLANT BASED as important reasons, but the most important reason (+21%) was for HEALTH & WELLNESS. Nearly 27% stated that they selected certain products because of CURIOSITY and WANTING TO TRY SOMETHING NEW. While VEGAN/VEGETARIAN was a factor for 11%, PLANT-BASED was nearly double. Plant-based foods are mainstreaming, and the desire to eat more plants is a driving factor in consumer behavior. The vegan or vegetarian market is not the largest cohort interested in plant-based foods, so food marketers can benefit from positioning these products toward taste, nutritional benefits and protein content to capture interest. Plant-based plays much better than vegan or vegetarian.

With pea protein at a lower awareness rate (compared to soy and other protein sources), but consumers seeking alternative proteins and new food experiences, new product development that includes pea protein may bring something new and different to the category, attracting attention. The key will be to make sure the product tastes great and delivers on the benefits of health and wellness outside of just being plant based.

AND *NOT* OR | THE BEST OF BOTH WORLDS | DAIRY + PLANTS

Roquette has created a creamy, delicious yogurt that brings together the best of both worlds – plant and dairy protein. For consumers who are trying to increase their intake of plants, but still love dairy – or for those who prefer plant based, but like the flavor profile and other benefits of wholesome dairy without adding extra cholesterol, fat and sugar – this yogurt brings benefits of both. It's a good entry point to plant-based foods for those seeking to add more to their diets. It's also a good way for those already enjoying plant-based and animal alternative products to enjoy something in the middle, without going full animal protein. When consumers were asked how likely they would be to try a plant + dairy yogurt, 1/3 were extremely likely and another 45% likely – nearly 75% of those surveyed had interest in trying this type of product.

When asked what attributes were most appealing, the #1 reason was NUTRITION (42%). Twenty-eight percent said they would consume this as part of their REGULAR MEAL HABITS/CONSUMPTION, and nearly 20% said they would use it for WEIGHT MANAGEMENT. With a large portion interested in the NUTRITION of this type of product, it showcases the benefits of a blend of two proteins into one product with a wide range of complementary benefits. There is synergy in a

blend of plant and animal protein that brings out the benefits of both – they are essentially better together. The taste and texture are excellent as well.

Consumers were asked which characteristics were important to them in a plant + dairy yogurt. Being PLANT BASED was selected 4x more than VEGAN in importance. Important characteristics were:

- PROTEIN CONTENT (18%)
- TASTE (18%)
- REAL DAIRY (12%)
- ADDING PROTEIN WHILE LIMITING ADDED SUGAR, CHOLESTEROL & FAT (12%)

Ten percent were intrigued by the UNIQUE COMBINATION OF BOTH PLANTS AND DAIRY proteins, and the other important characteristics were VEGAN (2%), GLUTEN-FREE (*5%) and non-GMO (6%) made with SUSTAINABLE INGREDIENTS (8%). Consumers were careful to point out that “HEALTHY FATS” are good and they seek them, so if there is fat reduction coming from the plant protein, food marketers can position not as a traditional “fat reduced” product, but adding protein without adding the fat (versus putting something in the product to “artificially” reduce the fat content).

PROTEIN SHAKES | VEGAN, READY TO DRINK DAIRY ALTERNATIVES | NON-SOY

When considering a protein beverage that is 100% non-dairy plant based and non-soy, consumers were extremely likely to try (24%) and somewhat likely (33%). Nearly 15% were indifferent, showcasing the need for highlighting benefits of such a product.

When asked what attributes were most appealing, #1 was NUTRITION (45%). Twenty-four percent said they would consume this as part of their REGULAR CONSUMPTION 17% said they would use it for WEIGHT MANAGEMENT and 13% as a MEAL REPLACEMENT. With a large portion interested in the NUTRITION of this type of product, it showcases the need to communicate the nutritional benefits of this type of product, outside of just being vegan or non-dairy.

When asked what attributes were most appealing, consumers selected TASTE (17%), PROTEIN CONTENT (15%), being PLANT BASED (11%) and ADDING PROTEIN WITHOUT ADDING EXTRA FAT, CHOLESTEROL OR SUGAR (11%).

A COMPLETE PROTEIN

There is no doubt that complete proteins are nutritionally important. It is especially critical that certain populations, like vegans, meet their intake needs. The concept of complete proteins may be somewhat unknown to mainstream consumers, and we wanted to obtain some insight on what they knew, and how they felt – about complete proteins. Less than 40% of consumers said they were aware of the term “complete protein.” Over 60% said they were not aware of the term. Of those who were aware of the term, half felt they knew what a complete protein meant, and the other half said they were not able to define what a complete protein was.

In total, 20% felt like they understood what it meant nutritionally, and only 5% felt it was important. When asked to tell us more about why a complete protein was important, the majority of consumers simply stated complete proteins are “good for me,” or “my body needs them” or “amino acids are important.” The lesson here is that even if consumers do not truly understand what a complete protein is, they may still seek it. We may see interest in protein sources, including

complete proteins, growing due to consumer perception of them being “good for me” without truly understanding why, or being able to be aware enough to assess their level of complete protein intake in their daily diets. For now, level of importance of complete proteins in food tracks at 5% of those surveyed.

Product developers can create plant-based, protein-centric food and beverages with complete proteins by blending complementary proteins. This also gives food and beverage manufacturers a chance to create a unique blend of ingredients that suits the brand positioning and flavor profile they are seeking. To increase consumer interest in complete proteins, food and beverage manufacturers can choose to educate consumers on the definition. This must be done with careful thought as populations that eat a fairly balanced diet will easily get the full range of needed amino acids and achieve their nutritional needs for complete proteins with a normal diet and eating routine. An ideal focus for complete proteins claims/statements may be in diabetic or functional food and beverages, body building and sports nutrition, and populations at (nutritional) risk.

It will be interesting to watch the evolving protein trend. We’ve seen a long trend in consumers seeking protein-centric meals and snacks, to analyze the source and type of protein (plant, animal), and now may see consumers question the chemical components of their protein sources – or not. The key will be to understand in which categories and applications this message will resound with the consumer. Innovation will increase in the creation of proteins that contain a broad range of amino acids targeting specific functions – including energy balance, weight loss, satiety and muscle growth and repair.

SHOPPING STYLE

We asked consumers to describe what type of grocery shopper they were and what was important to them when making purchasing decisions about food. Less than 7% described themselves as sticking strictly to a list, and 4% described themselves as not adventurous in the grocery store. Nearly 20% said they “mostly stick to the list, but throw in new things to try”. Thirteen percent said they loved trying new things and will actively seek “what’s new” in the store. Nearly 13% said they buy “mostly healthy things,” over 14% said mainly healthy, with some indulgent items, and 11% said they buy whatever they want. Nine percent said they considered themselves a “foodie.” As for organic and non-GMO foods – less than 4% said they stick to mainly organic or non-GMO foods. Six percent don’t care if products are organic or non-GMO.

WHAT IT MEANS

With pea protein still being seen somewhat as a modern, novel ingredient, it can be used as an exciting ingredient in new products to surprise and delight. Peas are an ancient staple of the human diet, and they are sustainably farmed and sourced. Food and beverage marketers have a variety of features and benefits with pea protein they can use to craft their story. Pea protein can be used as the star of the show by creating a protein-centric food or beverage product that relies on pea protein as the main ingredient. Pea protein can be used to boost protein content of other lower protein containing ingredients like almond and other nut milks. It can be used in combination with dairy proteins and in blends with other plant proteins for uniqueness and to showcase the complementary benefits of blending animal and plant sources. With lower awareness rates versus common proteins like soy and whey, pea protein-containing products will stand out in the crowd. Properly messaged, they can be mainstream or positioned in unique ways. The yellow pea is an ancient food with a bright future.

To learn more about pea protein, visit <https://www.roquette.com/the-pea-in-motion/pea-applications/>