



# GLOBAL OPPORTUNITIES IN PROTEIN - NEW CONSUMER REQUIREMENTS FOR SUCCESS

## 2018 Global Topic Report – Detailed Outline

Protein’s strong health halo continues to fuel interest and action globally. This 2018 report from HealthFocus International takes a deeper look at the topic of protein globally, regionally and across 22 individual countries to help companies better understand shopper concerns and attitudes—allowing them to connect more powerfully with their targets and bring market solutions faster and more profitably.

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### MARKETS:

Detailed findings by region and individual detailed country snapshots covering:

- NORTH AMERICA: USA and Canada
- LATIN AMERICA: Brazil and Mexico
- EUROPE: France, Germany, UK and Russia
- WEST ASIA: Saudi Arabia and Turkey
- SOUTH ASIA: India and Pakistan
- EAST ASIA PACIFIC: Australia, China, Indonesia, Japan, Malaysia, Philippines, South Korea, Taiwan, Thailand and Vietnam

### TOPICS COVERED:

- **Exploring the Protein Trend**
  - How interested are shoppers in protein?
  - How often are shoppers selecting foods/beverages because they are high in protein? Which markets are most actively seeking protein?
  - Are shoppers willing to pay up to 10% more for foods/beverages that are high in protein?

- How many shoppers have increased their use of protein over the past two years? Which markets show the highest growth?
  - How many shoppers say adding protein has become more important in their diet over the past two years?
    - Which markets are most focused on adding protein?
    - How does adding protein compare to other key dietary trends like plant-based foods/beverages, eating clean, natural, no artificial sweeteners, reducing sugar, adding whole grain, adding fiber, etc.)?
  - Is protein one of the top things shoppers want information about on the front of food packages? How does it compare to other things like sugar, calories, fat, etc.?
  - Brand Influence: How important is higher in protein in influencing shoppers to try a different brand food or beverage? Globally - how does it rank compared to other brand influences like price, taste, nutrition, natural, lower fat, lower sugar, etc.?
  - Labeling: How important are “high protein” statements on labels? Globally - how does it compare to other label claims such as high fiber, whole grain, sugar free, etc.?
- **Protein Benefits**
    - Do shoppers see protein as a core need or added benefit? Interest is high but is protein something they feel is lacking in their diet?
    - Which functional benefits do shoppers link to a high-protein diet (e.g., daily health, physical energy, mental energy, muscle health, weight management, athletic performance, etc.?) How do associations vary by market?
  - **Protein Sources:**
    - Are shoppers paying attention to the sources of protein they consume? Which markets are most particular about their protein sources?
    - How do shoppers determine a “good” source of protein (e.g., from a plant-based source, complete source of protein, natural source, nutrient dense, clean source, free from artificial ingredients?)
    - Interest and willingness to pay a premium for plant protein
    - Interest and willingness to pay a premium for whey protein
    - Which protein sources are shoppers interested in consuming more of:
      - Vegetable protein (e.g., peas)
      - Seeds (e.g., chia)
      - Grains
      - Beans
      - Nuts
      - Soy
      - Milk
      - Cheese
      - Lean meats
      - Fish

- Insect protein (e.g., cricket)
- Ratings (good/neutral/bad) for 16 different proteins:
  - Beans/legumes
  - Nuts/nut based spreads
  - Yogurt
  - Lentils
  - Quinoa
  - Hummus
  - Soy
  - Whey protein
  - Milk
  - Cheese
  - Pork/sausage
  - Red meat
  - Chicken/poultry
  - Eggs
  - Seafood
  - Protein bars