



# GLOBAL OPPORTUNITIES IN PROTEIN

New Consumer Requirements for Success

HealthFocus® International 2018 Global Topic Report

**REPORT EXCERPT**

## BACKGROUND

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 motivations and attitudes—allowing them to connect more powerfully with their targets and bring market solutions faster and more profitably.



# MARKETS COVERED

## **NORTH AMERICA**

USA  
Canada

## **LATIN AMERICA**

Brazil  
Mexico  
Argentina  
Colombia

## **EUROPE**

France  
Germany  
Russia  
UK

## **WEST ASIA**

Saudi Arabia  
Turkey

## **SOUTH ASIA**

India  
Pakistan

## **EAST ASIA PACIFIC**

Australia  
China  
Indonesia  
Japan  
Philippines  
South Korea  
Thailand  
Vietnam

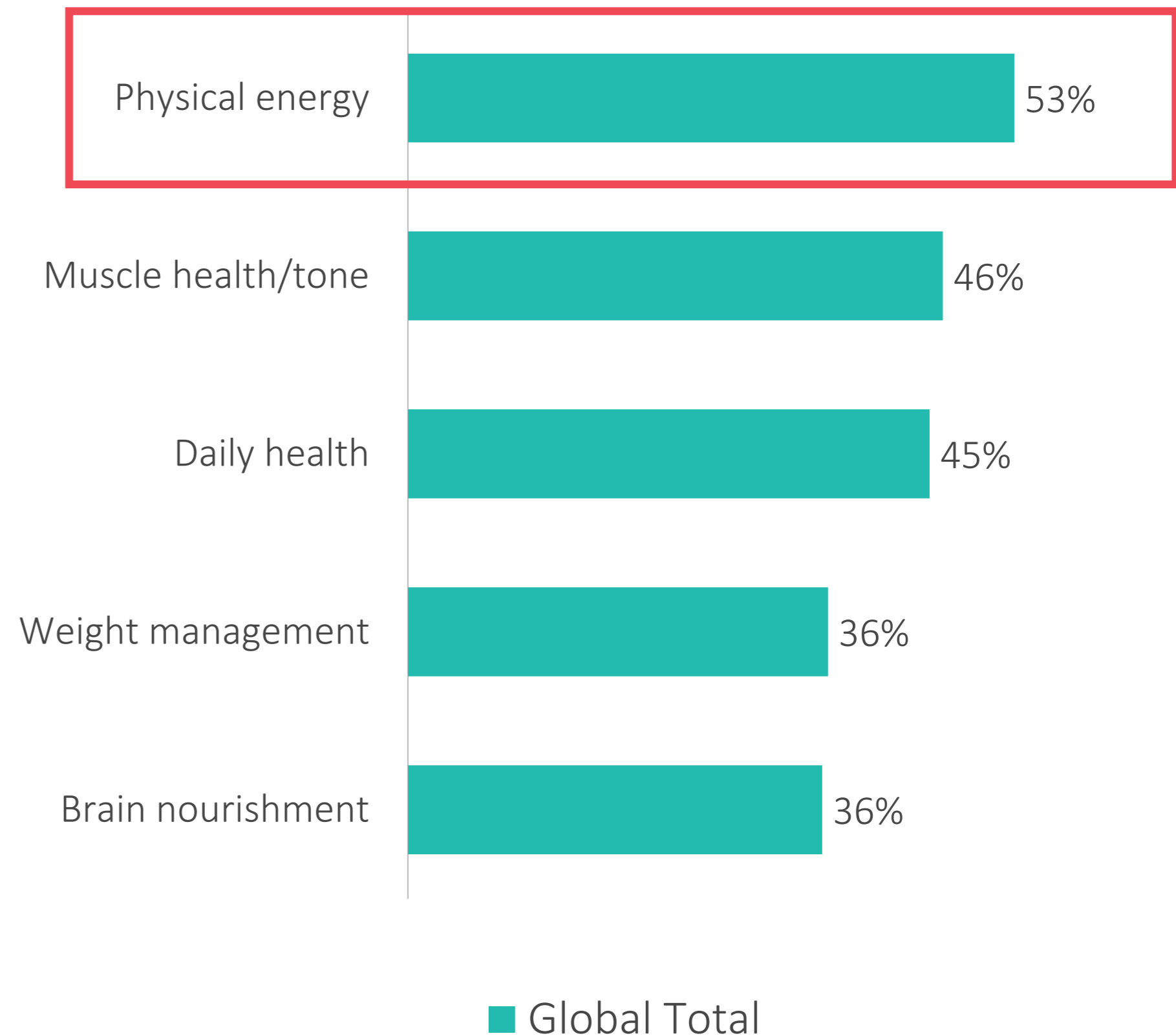
# PROTEIN PROVIDES MULTIPLE FUNCTIONAL BENEFITS & MARKET OPPORTUNITIES

While shoppers understand that protein is part of a healthy diet and essential in maintaining overall health—opinions are mixed when it comes to linking protein with specific functional health benefits.

The benefits of protein are still wide-ranging in the minds of shoppers—unlike fiber which is cornered into a digestive health space—but physical energy, muscle health and daily health are standouts.

The following slide illustrates the key benefits for protein—highlighting those that are not only linked to protein but also highly important functional benefits that shoppers are actively seeking from foods and beverages.

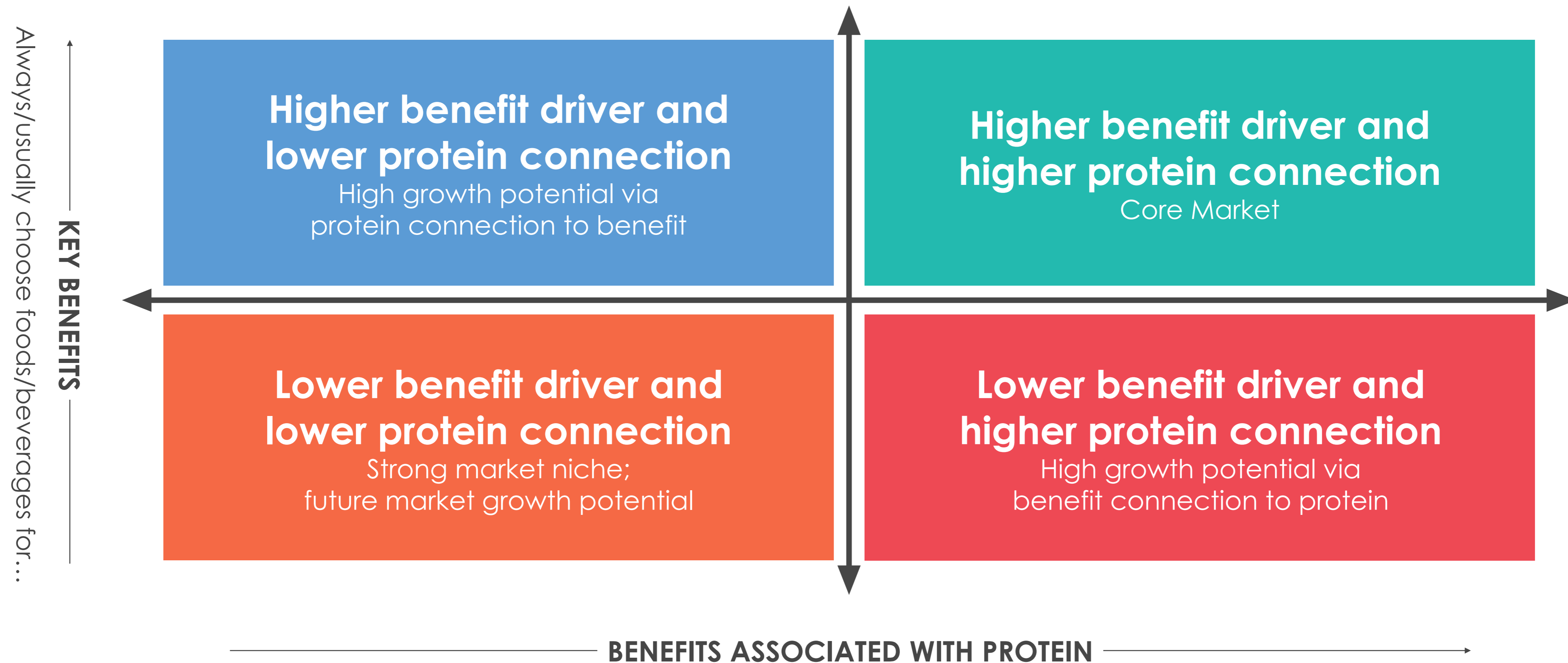
## Top 5 benefits linked to a high-protein diet





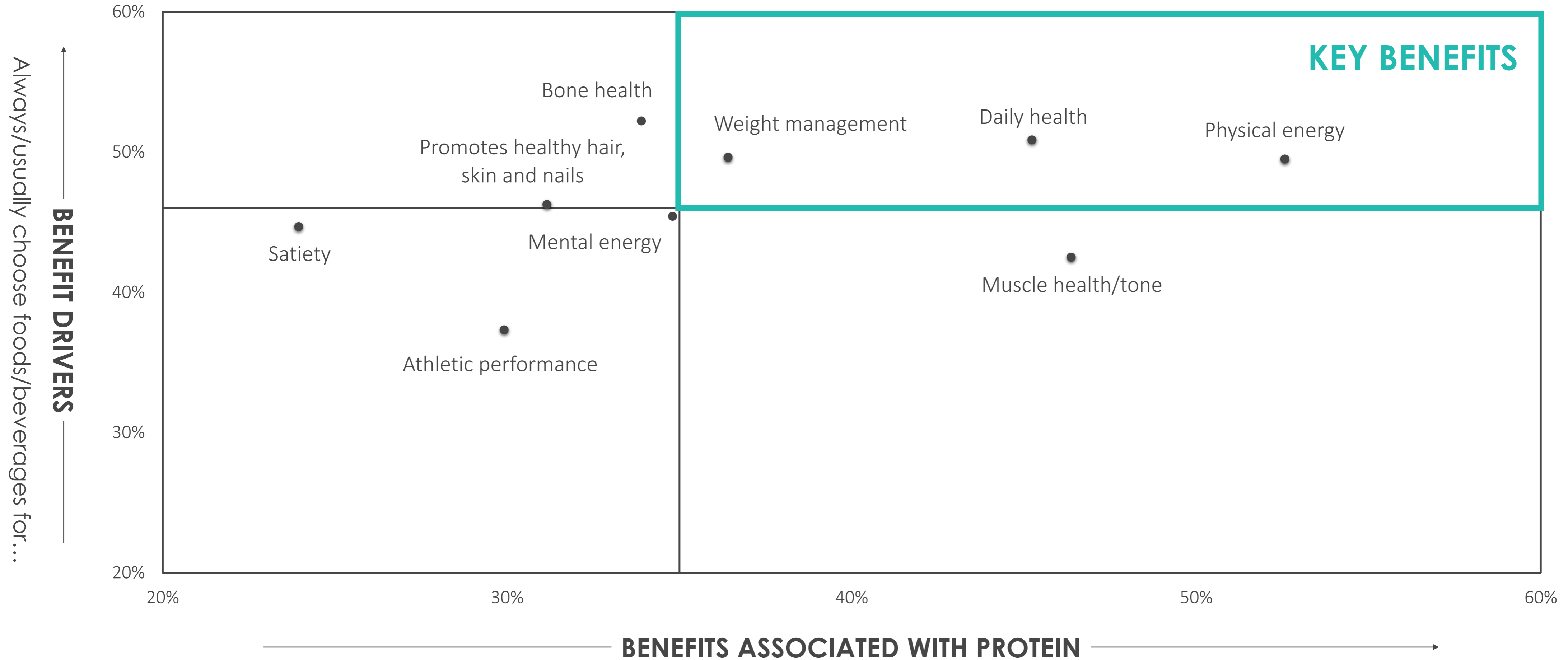
# BENEFIT DRIVERS & PROTEIN CONNECTIONS

On the next slide, benefit drivers—the functional health benefits that shoppers are actively seeking out—are plotted against the benefits shoppers associate with protein.



Please indicate which of the following are benefits of a high-protein diet

# BENEFIT CONNECTIONS



Please indicate which of the following are benefits of a high-protein diet

## BROAD INTEREST IN PROTEIN AROUND THE WORLD

Nearly 80% of shoppers, globally, are extremely interested/interested in protein—and almost half always or usually choose foods/beverages because they are high in protein.



# 48%

**of global shoppers choose foods/beverages because they are high in protein**  
(Always/Usually)



# GROWTH CONTINUES DESPITE BROAD AWARENESS & CURRENT USAGE

Globally—the market for protein continues to grow with over a quarter of shoppers saying they have increased their use of protein over the past two years.

Not only do many shoppers claim their actual usage has increased, but 3 out of 10 global shoppers say adding protein has become more important in their diet over the last year—ahead of other key dietary trends such as organic, plant-based, and non-GMO.

With so much interest in getting more protein, the need for front-of-pack information becomes very important. Global shoppers ranked protein within the top 3 things they want to see more information about on the front of food packages—just above fat and notably ahead of fiber.





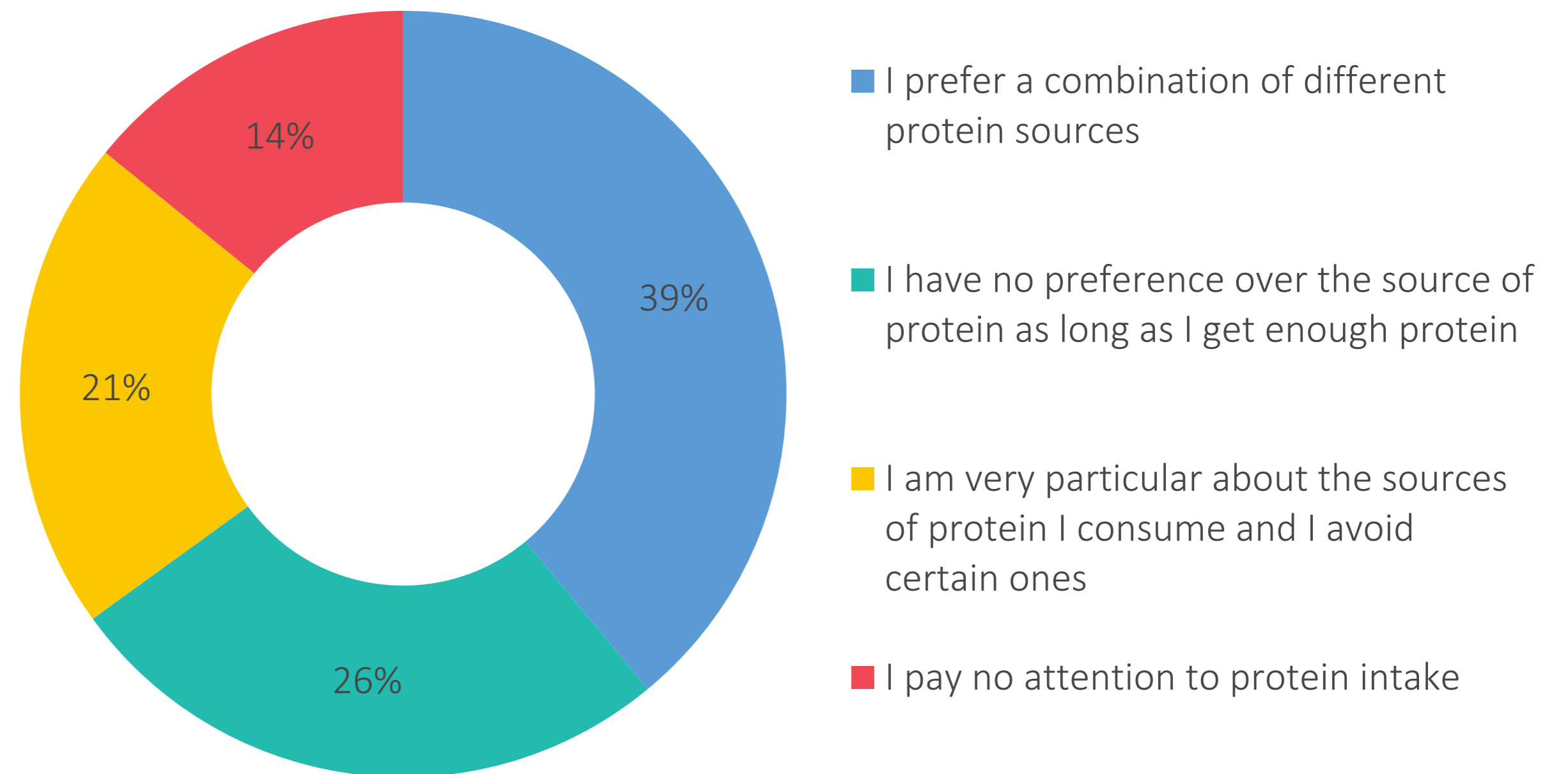
# SOURCE OF PROTEIN IS A KEY DISTINGUISHER TODAY

The majority of shoppers care about the sources of protein they consume—and macro-trends such as clean eating, sustainability and plant-based eating will likely continue to fuel shoppers interest in specific sources.

Shoppers are seeking out more protein—but they don't want just any protein source. 6 out of 10 global shoppers have specific preferences when it comes to the source of protein—with nearly 40% saying they prefer a combination of different sources and over 20% saying they are very particular about the sources of protein they consume.

## Which of the following most closely describes you?

Global Total



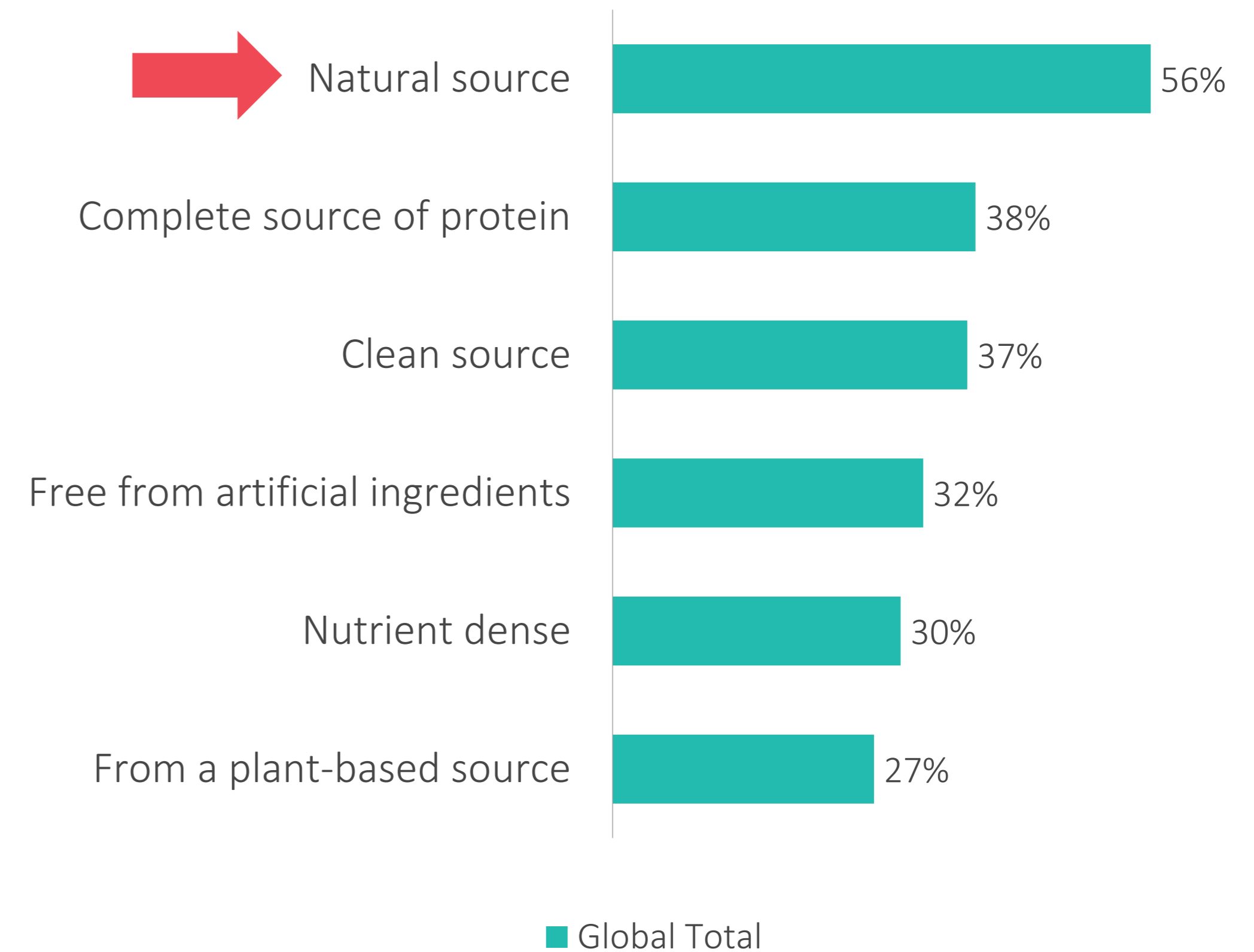
# HOW SHOPPERS IDENTIFY A “GOOD” SOURCE OF PROTEIN

With 60% of global shoppers focused on the types of protein they consume, it is important to understand how they define a good source.

Natural is by far the top indicator of a good source of protein, followed by a complete source of protein and clean.

Although interest in plant-based protein is high, only 27% selected it as an indicator of a good source of protein. Many shoppers desire the health benefits associated with plant-based options, but some shoppers might be concerned that they are not getting complete sources of protein.

## What helps to determine a “good source” of protein?



# NOT ALL PROTEINS ARE EQUAL

When respondents were asked to rate different types of proteins as good, bad or neutral—10 of the 16 proteins surveyed were rated as “good” proteins by the majority of global shoppers.

Beans/legumes, eggs and seafood received the most positive ratings—with 7 out of 10 global shoppers labeling these as “good” proteins.

Only pork/sausage received a strong negative perception with 40% rating it as a “bad” protein.

## Top 5: “Good” proteins

Beans/legumes	78%
Eggs	77%
Seafood	72%
Nuts/nut-based spreads	69%
Yogurt	68%

## Top 5: “Bad” proteins

Pork/sausage	40%
Red meat	19%
Protein bars	16%
Whey protein	9%
Hummus	9%





# HealthFocus®

INTERNATIONAL

To learn more about the full report,  
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