



# THE FUTURE OF PROTEIN: NEW CONSUMER REQUIREMENTS FOR SUCCESS

## 2021 Global Topic Report – Detailed Outline

While protein’s strong health halo continues to fuel interest and action globally, the protein source has come to the forefront, seriously impacting the food and beverage landscape. Fueled by the macro-trends of plant-based, sustainability, and clean eating, alternative protein sources (e.g., plant milks, meat alternatives, “lab meat”, etc.) continue to explode in popularity. This 2021 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.

### 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, Spain, and Russia
- MIDDLE EAST & AFRICA: Saudi Arabia, Turkey, and Nigeria
- SOUTH ASIA: India and Pakistan
- EAST ASIA PACIFIC: Australia, China, Indonesia, Japan, Philippines, S. Korea, Thailand, and Vietnam

### TOPICS COVERED:

- **Protein Target Profile:**
  - Exploring the *Next Gen Protein* group (consumers who are protein-focused and reducing meat consumption) to better understand unmet consumer needs and identify opportunities for future protein innovation. This group is profiled globally and sized within each region and country.
- **Protein Market Overview**
  - How many shoppers say adding protein has become more important in their diet over the past year? Which markets are most focused on adding protein?
  - 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?

- Labeling: How important are “high protein” statements on labels? Globally - how does it compare to other label claims?
  - 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.?
  - Are shoppers willing to pay a premium for foods/beverages that are high in protein?
- **Core Benefits Consumers Link to Protein**
    - 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 protein benefits associations vary by market and key demographics?
- **Shifting Views on 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)?
    - How do shoppers define a “complete protein” source?
    - Ratings (good/neutral/bad) for 11 different proteins:
      - Beans/Legumes
      - Nuts/Nut based spreads
      - Soy
      - Pork/Sausage
      - Red meat
      - Chicken/Poultry
      - Eggs
      - Seafood
      - Dairy
      - Grains
      - Plant protein
- **Opportunities in Plant Protein**
    - How has use of plant-based protein changed over the past 2 years?
    - Interest and willingness to pay a premium for plant protein. How does this vary by market and among key demographics?
- **Animal Alternatives + Lab Meat**
    - Changing use of animal-based protein
    - How many consumers are reducing meat consumption? How does this vary around the world? Are they avoiding all animal products?
    - How many consumers are avoiding red meat? How many are avoiding dairy?
    - Which animal alternatives are they most interested in using?

- What are the top barriers to avoiding animal alternatives?
- Would they be interested in a meat alternative if its taste and texture was exactly like meat?
- Interest in cellular agriculture and lab grown meat – which markets are most accepting of this idea?