



# **NEXT-GEN PROTEIN:**

## ***The Consumer Connection***

### **2022 Global Topic Report – Detailed Outline**

Consumers can't get enough protein, but not all protein is viewed the same and expectations are changing. Across the board, consumers are calling for better protein – better tasting, more nutritious, more sustainable, and more ethical. The world is moving quickly to new forms of protein, but the consumer is not there yet. Protein innovation is currently out of sync with consumer acceptance, and we are helping to close the gap between the emerging proteins and the consumer.

This report from HealthFocus International takes a deeper look into this topic globally, regionally, and across 23 individual countries to help companies better understand shopper motivations and attitudes.

#### **MARKETS:**

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

#### **TOPICS COVERED:**

- **Protein Target Profile**
  - Exploring the *Next Gen Protein* consumers 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. We will uncover:
    - What their diet looks like (e.g., exclusively plant-based, meat eaters, flexitarian, etc.)
    - What are their primary motivations

- What protein sources they are interested in
  - How interested are they in emerging protein solutions like lab-grown meat?
  - What do they look for on labels?
  - What drives them to pay more?
  - And much more!
- **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?
  - Do they think they get enough protein their diet?
  - Labeling: How important are “high protein” statements on labels? Globally - how does it compare to other label claims?
  - 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, mood, immunity, etc.)?
  - How do protein benefits associations vary by market and key demographics?
- **Shifting Views on Protein Sources**
  - What do their diets look like (e.g., exclusively plant-based, meat eaters, flexitarian etc.)?
  - Do they believe animal-based foods/beverages can be part of a healthy diet?
  - Are shoppers paying attention to the sources of protein they consume? Which markets are most particular about their protein sources?
  - What are the most important factors when selecting a protein? (e.g., health, nutrition, natural, quality, taste/texture, plant-based, animal-based, complete protein, sustainability, etc.)?
  - What types of protein are they interested in using in their diet?
    - Meat
    - Dairy
    - Eggs
    - Grains (e.g., wheat, rice, quinoa, oats)
    - Soy
    - Legumes (e.g., beans, lentils, chickpea)
    - Nuts and seeds
    - Hemp
    - Algae (e.g., spirulina)
    - Whey
    - Insect (e.g., cricket)
    - Pea protein

- Green vegetables
- Lab-grown protein
- Fungi-based protein
- Hybrid meat (e.g., contains a blend of animal and plant proteins)
- Meat alternatives

○ **Animal Alternatives + Lab Meat**

- Opportunities in plant protein: Interest and willingness to pay a premium for plant protein. How does this vary by market and among key demographics?
- How many consumers are reducing meat consumption? How does this vary around the world? Are they avoiding all animal products?
- Awareness and interest in cellular agriculture and lab grown meat – which markets are most accepting of this idea?