PROTEIN AND THE GLOBAL CONSUMER

Excerpts from “Protein and the Global Consumer” given by Barbara Katz, President, HealthFocus International on April 8, 2014 at the Protein Trends & Technologies Seminar.
Why All the Fuss About Protein?

Protein is Becoming More Important in Brand Trial

What is the influence of the following factors in getting you to try a different brand of food or beverage?
Why All the Fuss About Protein?

The History of Enthusiasm for Protein
KENNETH J. CARPENTER
Department of Nutritional Sciences, University of California, Berkeley, CA  Journal of Nutr. 1986 July
<table>
<thead>
<tr>
<th>1920-1950</th>
<th>1950</th>
<th>1950-1975</th>
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<tbody>
<tr>
<td>Nutritional research centered on the discovery of individual vitamins and amino acids. Little interest in human protein requirements.</td>
<td>Protein again became a concern due to a study of the disease, kwashiorkor in young children in Africa, Jamaica, and Central America. This disease, with a high mortality rate, occurred after weaning onto a bulky, low protein diet</td>
<td>The work of the Nutrition Division of FAO was based on the assumption that &quot;deficiency of protein in the diet is the most serious and widespread problem in the world&quot; (24).</td>
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THE RESPONSE TO “THE PROTEIN GAP”?

Easy to use economic sources of protein like fish protein concentrate and oilseed protein concentrates, largely considered unsuccessful in the end.

WHY?
Because protein sources like meat have always been considered to be something that could be aspired to culturally as wealth increased.
Protein is More than Nutrition

Chimpanzees, our closest primate ancestors, supplement their plant-based diet by eating meat. Males hunt small monkeys and share the meat to “reinforce social bonds within a group as well as to attract females.”

Meat acquisition is still considered a sign of success and a universal symbol of affluence.
Meat = Affluence

China’s level of meat consumption doubled between 1990 and 2002 to 52 kg. per person

So simply getting protein is rarely going to be the answer consumers seek.

More often than not, consumers seek food first.
Protein Seekers - Always or Usually Choose Foods that are High In Protein

From 11,500 total responses 38%
Protein Seekers Aren’t Always Younger

### By Age – HealthFocus Global Study

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Total</th>
<th>Protein Seekers</th>
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<tbody>
<tr>
<td>18-29</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>30-39</td>
<td>24%</td>
<td>25%</td>
</tr>
<tr>
<td>40-49</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>50+</td>
<td>33%</td>
<td>31%</td>
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Protein Seekers Tend to Make Healthier Choices. Protein is One Aspect of their Healthier Lifestyle

<table>
<thead>
<tr>
<th>Healthy Living Information - HealthFocus Global Study</th>
<th>Always/Usually:</th>
<th>Total</th>
<th>Protein Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eat healthy Foods</td>
<td>68%</td>
<td>82%</td>
<td></td>
</tr>
<tr>
<td>Give up Convenience for Health Benefits</td>
<td>36%</td>
<td>52%</td>
<td></td>
</tr>
<tr>
<td>Avoid Some Favorite Foods in Order to Eat Healthier</td>
<td>38%</td>
<td>55%</td>
<td></td>
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</table>
SEEKING PROTEIN SPECIFICALLY OR SEEKING HEALTH AND PROTEIN IS PART OF IT?

TWO OPPORTUNITIES?

- don’t take any measures
- look to a healthy diet
- Protein Seekers

More Flexible

Committed to Health
92% SAY THEY KNOW WHAT PROTEIN IS AND UNDERSTAND ITS BENEFITS

46% SAY THEY KNOW WHAT SOY PROTEIN IS AND UNDERSTAND ITS BENEFITS

35% SAY THEY KNOW WHAT WHEY PROTEIN IS AND UNDERSTAND ITS BENEFITS
Use the Right Vehicle

Protein provides a lot of latitude and opportunity because both the ingredient and the end sources are valued.
The Right Vehicle for the Audience
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