

20 CATEGORY 14 INSIGHT



PROTEIN ISN'T JUST FOR BEEF ANYMORE

The undisputed “King of the Claim” for 2013 and beyond is protein. It was top of mind for 57% of consumers who made it their mission to consume more protein, up 9% from 2012, and consumers aged 18-34 and 65+ were the most likely to seek out protein. Protein is making its mark everywhere from beverages to desserts, and we’ve got the data, trends and new product info to prove it.

THE NEW BUZZ WORD

2013 was a big year for protein claims in new products and 2014 appears to be maintaining this level, especially in the snacks and breakfast cereal categories. Meal replacement beverages (Other Beverages) traditionally see higher numbers in the third and fourth quarters, and there isn't a reason to assume this trend won't continue.

TOP HIGH PROTEIN CATEGORIES

Categories	2010	2011	2012	2013	2014	Total Sample
Snacks	144	135	71	121	110	581
Other Beverages	35	68	43	92	50	288
Dairy	22	38	50	96	64	270
Processed Fish, Meat & Egg Products	50	32	23	16	6	127
Meats & Meal Centers	15	19	15	22	10	81
Breakfast Cereals	15	3	7	13	17	55
Bakery	10	4	15	17	8	54
Side Dishes	5	11	6	12	3	37
Desserts & Ice Cream	0	0	16	11	2	29
Sports and Energy Drinks	7	3	5	9	2	26
Total Sample	319	338	257	422	288	1624

Search criteria: Claim matches high-protein, Food & Drink categories, date published is between January 2010 and current date (September 8, 2014), and country matches USA.

ALWAYS BETTER WITH A LITTLE FLAVOR

Whether it's a high protein snack bar or cereal, you can bet it's being flavored with chocolate, peanut butter, vanilla or a combination of these. Meal replacement beverages have a little more variety in their new product introductions with strawberry or dessert flavors being popular.

We have broken out the flavors into food and drink categories to highlight what consumers are craving and manufacturers are introducing:

UNIQUE FLAVORS

Apple Pie
Chocolate, Caramel & Pretzel
Dark Chocolate, Coconut & Greek Yogurt
German Chocolate
Pina Colada
S'mores
Strawberry Cheesecake
Sweet Chili & Almond

TOP HIGH PROTEIN FLAVORS

FOOD CATEGORIES

Chocolate
Strawberry
Chocolate/Peanut Butter
Peanut Butter
Blueberry
Vanilla
Beef
Berry
Peach
Honey

DRINK CATEGORIES

Chocolate
Vanilla
Strawberry
Berry
Strawberry Banana
Cookies and Cream
Strawberry and Cream
Fruit Punch
Chocolate Peanut Butter
Vanilla Cream

CATEGORY HIGHLIGHTS

SNACK BARS

Consumers are snacking more than ever due to their fast paced lifestyles, and they also have a need to keep up energy throughout the day. Couple that with the fact that protein is in high demand across all categories, and it makes sense that the snack food category represents the most launches of high protein foods. In 2013, 21% of all high protein foods and drinks launched in the U.S. were snack bars.⁴



21%

OF ALL HIGH PROTEIN
FOODS AND DRINKS
LAUNCHED IN THE US
WERE SNACK BARS.

MEAL REPLACEMENT BEVERAGES

Whether used before or after workouts or for energy or dieting, meal replacement beverages are being used by consumers in droves. Half of protein drink users consume meal replacement beverages to get more energy, and 48% do so because they help to curb hunger cravings and provide satiety between meals.⁵

CEREAL

Cereal is probably one of the most eaten categories in U.S. households, as 91% eat cold cereal and do so about 12 times a week. Over 80% of cereal consumers want a high protein cereal⁷ and high protein is one of the top two claims that consumers look for when purchasing cereal.⁸



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DESSERTS

We've already established that protein should be eaten throughout the day, so why not a protein-amped dessert? We're seeing pudding and frozen yogurt with dessert flavors that satisfy the protein-seeking, health-conscious consumer. In frozen desserts, smart manufacturers are leveraging Greek yogurt's high protein content.

TRENDS AND OPPORTUNITIES



RETURN TO THE CAVE

Many of the recent trending diets have protein at their core and the Paleo diet is no exception. Women especially are incorporating more protein in their diets with the goal to manage their weight, reduce fat and develop lean muscle. When shopping for groceries for either themselves or their families, 79% of women were interested in protein rich food.²

As such, the Paleo food trend is influencing the introduction of snack bars and cereals designed to appeal to consumers seeking high protein. Paleo's grainless tenet eliminates the opportunity for consumers to enjoy typical grain-based granola bars or grain-laden cereals. Bars that can be substituted for these breakfast classics star beef or other natural,

preservative free, protein sources and are winning over Paleo and protein-craving consumers.

PROTEIN: IT'S WHAT'S FOR DINNER. AND BREAKFAST. AND LUNCH.

Recent studies have shown that protein is best consumed in smaller amounts throughout the day, resulting in greater protein retention. Typically, protein eaten at dinnertime represents 45% of an American's daily intake.³ As consumers increase their protein intake throughout the day, expect to see a demand for high protein snacks and meals that can be consumed on-the-go.

SNACKS SHOULD HAVE IT ALL

Kids are big snackers. Combine this with the average U.S. child's fast-paced lifestyle, and you have the opportunity for high protein energy sources that taste great and carry kids from activity to activity. In addition, schools in the U.S. will have to satisfy new guidelines established by the Healthy, Hunger-Free Kids Act, passed in July

2014. This act sets down a range of criteria that snacks sold in schools must meet, including calorie, sugar, fat and sodium content limits, as well as serving size limits on beverages. Furthermore, it requires snacks to have wholegrain, fruit, vegetable, dairy or a protein-rich food as their first ingredient.⁹

The fun is missing in the snack bar market as products designed exclusively for kids are few and far between. Unique flavors, packaging and branding all could be very successful for the savvy manufacturer and could create a new niche market in kids' protein bars.

“Many of the recent trending diets have protein at their core.”

TRENDS AND OPPORTUNITIES (CONTINUED)

CHOCOLATE: A NEW PROTEIN TREAT

Chocolate confectionery is typically eaten as an indulgent treat, post-meal or a mid-afternoon pick-me-up. But who would have thought it could make a delicious and functional post-workout alternative?

Consumers tend to be more aware of using nutrition products before or during exercising, compared with choosing products that can help their muscles recover after exercising. In the U.S., for example, 54% of those who use nutrition food or drink do so before or during exercise as a snack or “fuel,” while 36% eat these products after exercising for muscle recovery.¹⁰

Enhancing chocolate with protein, nuts or whey powder could be a new post-workout opportunity for chocolate confectionery and presents new flavor and positioning opportunities for manufacturers.

DESSERT: A SWEET SOURCE

The Greek yogurt market has exploded, so its transition to the frozen treat market was a natural progression. Greek yogurt’s reputation for being a great protein source capable of pairing with sweet flavors has dessert manufacturers exploiting the health and better-for-you opportunities this product provides. Since 90% of all U.S. households purchase frozen desserts, and as the demand for protein continues to grow, especially throughout the day, this pairing makes a logical and ultimately immensely profitable conclusion.¹¹

VEGAN MARKET

It isn’t easy to be a vegan when protein is the newfound darling of the nutrition world. Choices are limited, especially if portability and convenience are goals. In the U.S., products that had a combined claim of being both high protein and vegan showed a 54% growth from 2008-2012.¹² This signifies that opportunity exists for manufacturers who can offer both high protein and vegan formulations.



“The Greek yogurt market has exploded.”

TRENDS AND OPPORTUNITIES (CONTINUED)



ORGAIN SMOOTH CHOCOLATE VEGAN NUTRITIONAL SHAKE

Contains 16g plant protein, 10 organic certified fruits and veggies and 21 vitamins and minerals. It is claimed to be perfect for pre- or post-workout replenishment, sustained energy, an antioxidant boost, weight management and busy lifestyles.

SKOUT ORGANIC TRAILPAK JALAPEÑO SALSA RAW PUMPKIN SEEDS

High in protein, zinc, iron, magnesium and omega 3. They are full of minerals, nutrients and living enzymes to nourish the body and provide healthy fuel and contain 10g protein per serving.



NATURE VALLEY PEANUT BUTTER GRANOLA

Made with clusters of whole grain oats and a touch of peanut butter. It contains 10g of protein and 25g of whole grain per serving and is described as a simple way to add protein throughout the day.



SLIMFAST PINA COLADA SHAKE

Available as a limited edition. This tropical treat contains 10g protein and 5g fiber, all for under 200 calories.



GATORADE RECOVER CHOCOLATE CARAMEL WHEY PROTEIN BAR

Contains 20g of protein to help muscle recovery.

TRENDS AND OPPORTUNITIES (CONTINUED)



YASSO MINT CHOCOLATE CHIP FROZEN YOGURT BARS

Contain only 100 calories each and six grams of protein.



QUAKER PROTEIN OATMEAL RAISIN NUT FLAVOR BAKED BARS

Described as a great recharge for the day. This product is a good source of protein containing 10g of it, as well as 8g whole grain in every bar.



KIND STRONG ROASTED JALAPEÑO

Contains 10g protein and is a good source of fiber.



MHP FIT & LEAN POWER PAK PUDDING WITH VANILLA CRÈME FLAVOR

Described as a high protein, satisfying, convenient, anytime snack on the go, which contains only 100 calories and 15 grams protein.



ANSI GOURMET CHEESECAKE STRAWBERRY SUPREME CHEESECAKE

Naturally sweetened and contains no gluten, rBst and rBGH hormones, soy protein or sugar alcohol. It is low in carbs, an excellent source of protein and fiber and provides 20g protein per serving.

FONA CAN HELP!

Protein is a necessary building block for health and wellness. Consumers demand for protein will only continue to grow as protein is increasingly positioned as a necessary energy source for satiability, muscle development and overall health.

Let our market insight and research experts translate these trends into product category ideas for your brand. They can help you with concept and flavor pipeline development, ideation, consumer studies and white space analysis to pinpoint opportunities in the market.

FONA flavor and product development experts are also at your service to help meet the labeling and flavor profile needs for your products to capitalize on this consumer trend. We understand how to mesh the complexities of flavor with your brand development, technical requirements and regulatory needs to deliver a complete taste solution. From concept to manufacturing, we're here every step of the way. Contact our Sales Service Department at 630.578.8600 to request a flavor sample or visit www.fona.com.

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