

20 CATEGORY 17 INSIGHT REPORT



Protein

Health & Wellness, Alternative Sources, and Innovation

Protein is the golden child these days, as consumer focus on health & wellness and sustainability is leading to BIG growth. From protein-rich beer to pea protein baking mix for DIY “clean” protein bars, product developers are overcoming the inherent taste challenges to bring innovative products to market.

But even as we track the “new,” we see that some things remain the same: Chocolate flavor still dominates, no matter the protein source, and bars remain tops.

Let’s bulk up on our protein knowledge.

WHEY & SOY ALTERNATIVES

Soy and whey have been the leading sources of protein used in market products, however, each has come under scrutiny for the presence of GMOs, level of processing and incompatibility with free-from and vegan diets. While still in high demand, they are deterring health-conscious consumers who are seeking cleaner, simpler foods.

PEA PROTEIN

Pea protein is an allergen-free soy and whey alternative whose use has increased dramatically in recent years. The number of North American food launches containing pea protein soared by more than 660% between Jan. 2012 and Dec. 2016 (28 products to 213).

PEA PROTEIN IN PIZZA

Pea protein works well in bread products, and we see MuscleFood's high (pea) protein pizzas hitting the UK market with more than 60 grams of protein. Mintel reports that one in five US pizza eaters consider high protein content when purchasing a pizza, so this could be something of interest for US food manufacturers.

PEA PROTEIN FOR BAKING

UK company Protein Pow launched a pea protein cooking mix, providing new opportunities for consumers to incorporate protein more easily and evenly into their diets. The mix is comprised of plain protein powder, coconut flour, gluten-free oats, organic vanilla and coconut sugar.

The mix is positioned as "the world's first blend of ingredients that allows you to make your own healthy and delicious protein bars in under two minutes - no cooking or baking involved. You can also eat it raw - as porridge! And use it as flour to make protein pancakes, cookies, cakes – and more!"

PEA PROTEIN IN NUT MILK

In April 2016, Ripple Foods launched a range of plant-based, dairy-free milks that uses a neutral-tasting yellow pea base. It is a head-turning product in the dairy-free milk category because it provides a level of protein you don't find in most non-dairy milks. Whereas almond milk typically contains just 1g of protein per cup, Ripple delivers 8 grams of protein per 8oz serving, which is basically the same as cow's milk.

In addition to the protein similarities, Ripple milks are also said to be closer in flavor to cows' milk than most soy and nut milks. Because of this, it is positioned as having more uses than plant-based drinks with more distinct or sharp flavors. Ripple Milks are free from dairy, lactose, nut, gluten and GMO, and contains 30% less sugar than chocolate milk, 50% more calcium than milk, 8g protein per serving and 32mg DHA omega-3s. The 100% plant-based and vegan product is made with hand-selected high quality yellow peas, which are said to be high in protein, rich in vitamins and minerals and low in sodium.



OAT PROTEIN

As consumers strive to reduce their meat intake but still consume protein, the popularity of plant-based meat-substitutes has risen. Finnish company Gold & Green has launched Pulled Oats featuring oat protein. Oats are accepted by consumers as a healthy and wholesome food, and they may have an edge over soy protein if declared as GMO-free.

WATER LENTILS

Lentel is a sustainable, non-GMO plant-based protein with an amino acid profile comparable to whey with high levels of calcium and other nutrients. It has more essential and branch chain amino acids than any other plant protein. It is a green powder reportedly a success in chips, crackers, snack-mixes, bars and cereal clusters, in addition to protein shakes, sports drinks or meal replacements. The Lentel website states: "This incredible protein-packed plant powder has the capability to positively impact both an individual's nutrition and the world's food supply."

INSECT PROTEIN

Insects have been receiving attention as an alternative high protein source that are also high in fat and essential amino acids. Crickets and other insects are more environmentally friendly since they can be raised on less land and emit fewer greenhouse gases than traditional livestock. Many countries in Africa, the Americas, Asia, and Europe are already ahead of the game, with an estimated 2 billion people consuming insects as part of their regular diets, according to Food Navigator. But a "significant minority" of US (27%) and UK (26%) consumers are ready to jump on the insect train and eat products made with ingredients like cricket flour. In China, however, 52% are interested.

MINIMAL PROCESSING & "REAL" INGREDIENTS

Consumers overwhelmingly prefer their protein to come from real food ingredients naturally high in protein such as nuts, seeds, ancient grains and legumes. (Not surprisingly, these ingredients are increasingly prevalent in snack bar launches.) Think about your consumer when exploring alternatives like pea and oat protein. Will they get vetoed by consumers because of processing?



HIGH PROTEIN FOODS

Between January 2012 and January 2017, we saw 1,297 new products carrying the High Protein claim were launched in North America. This represents a 33% increase of launches over these 5 years. The top 3 categories were Snacks (451), Dairy (331), and Processed Fish, Meat and Egg Products (118).

It will come as no surprise that the top Sub-Category with a High Protein claim was Snack/Cereal/Energy Bars, with 281 new launches over this time period. Top flavors for High Protein Snack/Cereal/Energy Bars include: chocolate, chocolate peanut butter and peanut butter.

62%

*of all High Protein Snacks are
Snack/Cereal/Energy Bars*

94%

*increase in launches of High
Protein Snack/Cereal/Energy Bars
over this time*



Halo Top S'mores Ice Cream is a light ice cream that is low in sugar, fat and calories, high in protein, and free from artificial softeners, artificial sweeteners, corn syrup and synthetic growth hormones. The all natural, kosher certified, vegetarian product contains 320 calories per pint.



Hallbrands Chedz Spicy Premium Cheese Snack is made with real cheese and simple ingredients. It contains 7 g of protein, and can be used in party mixes, to accent soups and salads, and with wine. This crunchy, high protein snack is made with milk from cows that have not been treated with artificial growth hormones.



MusclePharm Combat XL Sport Series Cinnamon Twist Natural Flavors High Protein Bar is packed with quality nutrients to power athletic performance and active lifestyles. Utilizing four sources of complete protein, this soft triple-layered baked protein bar helps fuel muscle growth, energy and recovery, is banned substance tested, and is loaded with 30 g protein and 390 calories.

HIGH PROTEIN BEVERAGES

Between January 2012 and January 2017, 266 new beverage products touting the High Protein claim were launched in North America. This represents a large 72% increase of launches between 2015 and 2016.

The top 3 categories were Other Beverages [Protein Powders & Protein Drinks] (229), Sports & Energy Drinks (19), and RTDs (11). The top Sub-Category of beverages with a High Protein claim was Meal Replacer & Other Beverages, with 228 new launches over this time period. Interesting products of note were protein-enhanced coffees, tea and beer.

The top flavors for High Protein Beverages are still chocolate, vanilla and strawberry—followed by banana berry and orange.

86% of all High Protein Beverages are Protein Powders & Drinks

25% of all High Protein Beverages are chocolate flavored



Powerplant Apple, Berries, Sprouted Seeds & Pumpkin Seed Protein is a 100% plant based protein powder that is high in fiber and protein. The kosher and organic certified product is free from cholesterol and salt.



Slingshot Plain Yogurt Protein Drink with a Crunchy Shot contains 20 g of power-packed protein, 3 g of fiber from honey sweetened rolled oats, chia seeds, toasted almond bits, 600+ mg of omega 3 fatty acids, and live and active probiotic cultures.



Coco Libre Coffee Flavor Coconut Water Protein Shake contains more than 20g of protein. The kosher certified product is high in protein and calcium, a source of potassium, calcium, phosphorus and sodium, and is low in fat. The gluten-free shake contains no preservatives.

PROTEIN IN COFFEE, TEA AND BEER

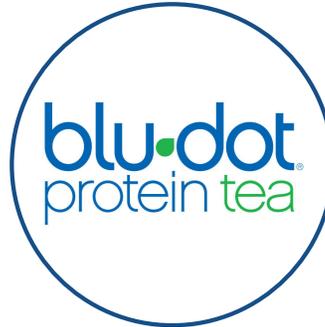
COFFEE

Consumers are increasingly seeking the addition of functional and healthy ingredients to their coffee, according to Mintel. The research firm reported that “44% of U.S. consumers wish they could add healthful ingredients (eg vitamins, minerals) to their coffee- and tea-based drinks at foodservice.” RTDs are providing this option like Wide Awake Coffee Co. line of High Protein drinks (11g protein per serving) available in Vanilla, Mocha and Caramel flavors.



TEA

Canadian company Blu Dot Beverage launched a line of high protein teas. The drinks contain prebiotic dietary fiber and whey protein from New Zealand. The range of 4 flavors contains 12g protein and 6g fiber, and are free from artificial ingredients, GMO, gluten, and added sugar. Flavors include: Orange Pineapple, Blueberry Acai, Cranberry Pomegranate, and Apple Pear.



BEER

Mighty Squirrel beer contains 4g of protein per serving compared to 1g for your typical beer. Initially only sold in Boston, it launched nationally in early 2016 following strong sales. The target audience for the protein beer is active, health-conscious drinkers, but the company stresses that taste is still the most important attribute. The original variety is described as “complex with bready, caramel and citrus notes, plus a hint of honey,” while the light version is said to be “clean and crisp with honey notes.”



MILLENNIALS & PROTEIN

Millennials are strongly focused on health & wellness and believe protein to be an important part of that lifestyle. And with 87% of Millennials drinking tea and coffee, adding protein to these drinks could be right on target.



Protein of all types continues to appear in new products, like beer and coffee, as consumers' focus on health & wellness stays strong. Alternatives to soy and whey, such as pea protein, are important for those consumers driving the increase in Vegan claims and those interested in plant-based protein boosts in food and beverages for other health reasons and sustainability, as well. Insects and water lentils, while not yet making huge in-roads in the US, are on the radar now and are ingredients to watch as sustainability is sure to remain a hot topic in the future.

FONA CAN HELP!

Let FONA's 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. Our 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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