



Where science  
& creativity meet

# PROTEIN TREND WITH NEXT NORMAL

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How IFF Approaches to Trend

Where Plant Protein Stands

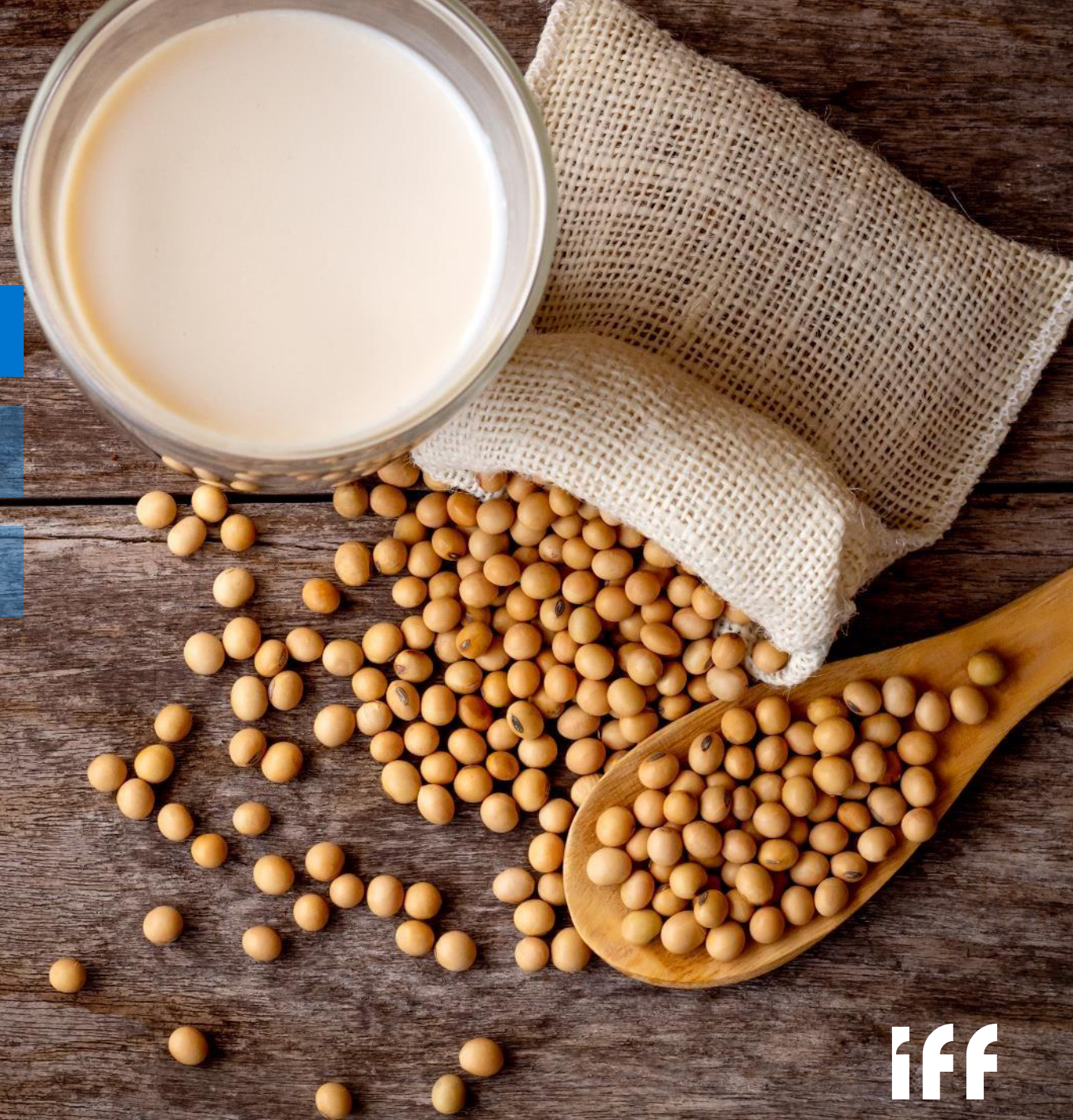
3 Key Trends in Next Normal



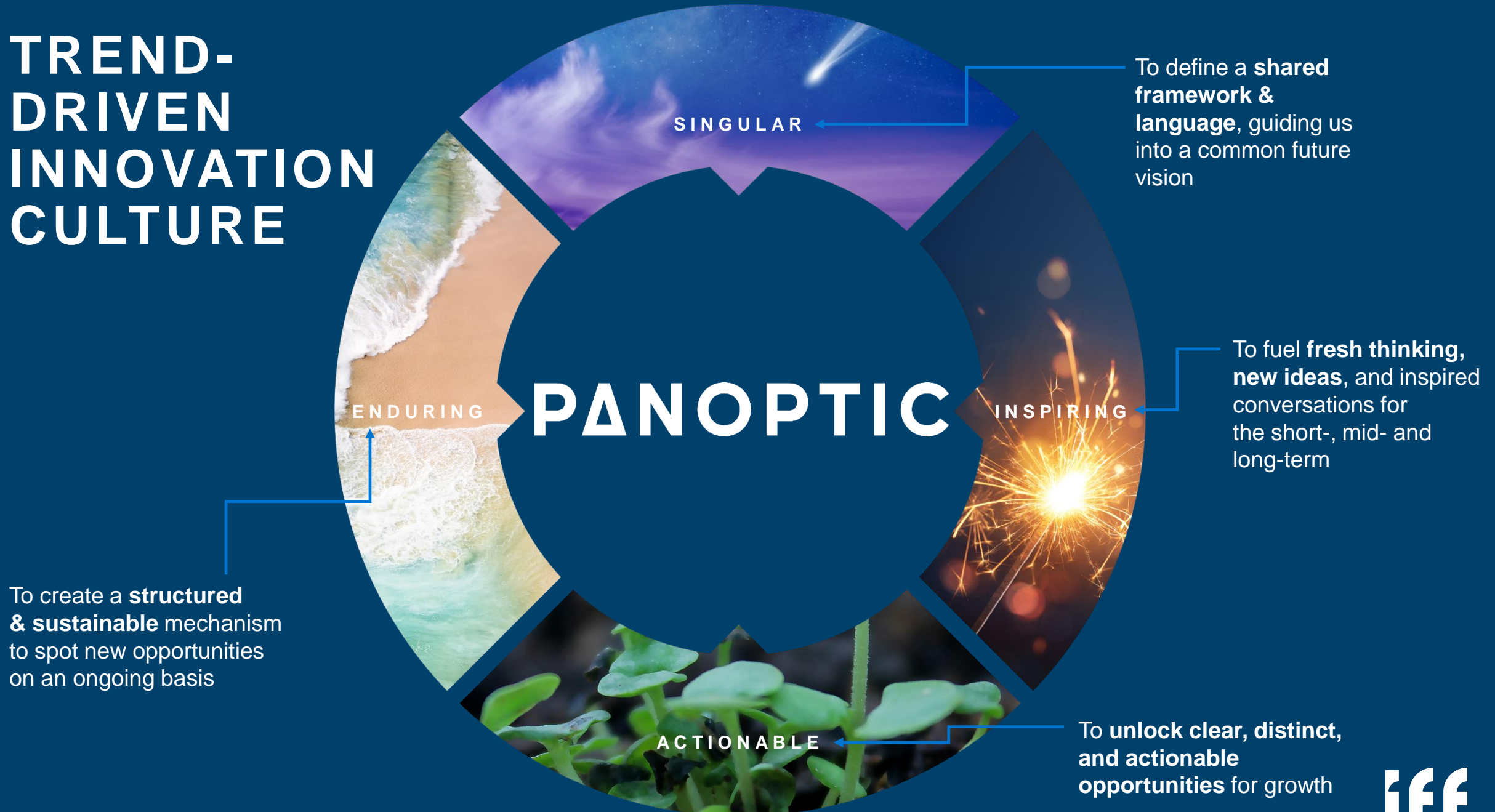
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# TREND-DRIVEN INNOVATION CULTURE



# PANOPTIC

## Trend-Driven Innovation

CONSUMER

### Market & Sensorial Trends

*Short Term (0-3 years)*

### MARKET & SENSORIAL TRENDS

#### Targeted Offering

Changes in the market, consumer experiences and sensorial expressions

PEOPLE

### Lifestyle Trends

*Mid-longer Term (3-5 years)*

### LIFESTYLE TRENDS

#### Innovation & Portfolio Development

Changes in people's values, needs, aspirations and behaviors

SOCIETY

### Societal Trends

*Long term (5+ years)*

### SOCIETAL TRENDS

#### Strategy & Vision

Large underlying macro drivers of change that will impact the future



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# PLANT BASED PROTEIN HAS WIDENED THE AVAILABILITY FOR CONSUMERS



**+6%**

**1/3 of consumers  
increased protein use  
in the past 2 years**

(Source: Protein Report, Health Focus International, 2021)

**NPD using Plant-Based Protein  
with Protein FF Claim has  
increased since past vs 2018 (53%).**

(Mintel GNPD)

# GROWTH DRIVERS AND CONSUMER DEMAND

How Soy Protein have tap into the consumer demand during Pandemic Time



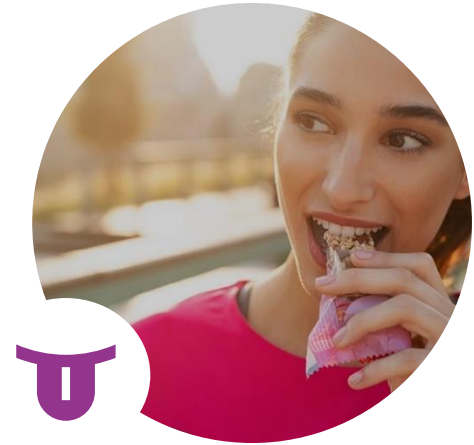
## HEALTH REDEFINED

**Self Care**  
**Balanced Diet**  
**Prioritized Wellness**



## FORMAT AND VERSATILITY

**RTD**  
**On the Go**  
**Convenience**



## CONSCIOUS INDULGENCE

**Taste and Texture**  
**Instagramable**  
**Guilt Free**



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Public

## LIFESTYLE TREND

# PREVENTATIVE SELF-CARE

Taking a proactive, preventative and longer-term responsibility for one's own health

People across the globe are taking greater ownership of their health. They are striving for a long-term, preventative, consistent approach to self-care as opposed to a more reactive treatment of ailments. People see health as a crucial enabler in their life and are increasingly feeling more responsible for their own well-being with a strong focus on looking after and nurturing their body and mind over time.

## KEY STATS

**94%** of consumers act to improve their wellbeing. (IFF Consumer Tracker, 2021)

**1 out of 2** of global consumers say they make proactive health and wellness choices on a regular basis with the top two reasons being to live a longer and healthier life, and avoid preventable diseases. (Nielsen, 2022)

**78%** of people globally want more control of their healthcare. (Ipsos, 2021)

**250%** Google searches for 'self-care routine' have soared by 250% since the first lockdown in March 2020, and on TikTok, '#selfcare' has 12.2 billion views (TikTok, 2022).

## KEY WORDS

immunity • resilience • self-care • telehealth • sleep • aromatherapy • harmless & safe • chemophobia • hygiene • unprocessed foods • germ phobia • protection • food as medicine

**PLANT PROTEIN  
FOR  
HEALTH  
REDEFINED**



**Consumers link protein with a wide-range of benefits**

**27% of global consumers are seriously cutting back on animal products. This varies around the world with most markets not strictly avoiding animal products.**

**The power of protein remains strong: 31% of consumers increased their use of protein in the past 2 years**

**Protein positioning is anchored primarily in general physical benefits (energy, muscle health, and daily health) the power of protein is expanding to new areas**

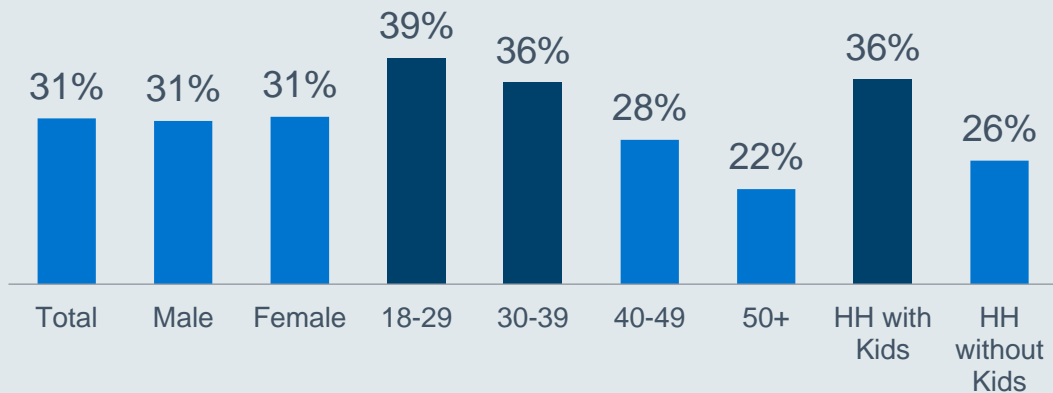
**40% of consumers prefer a combination of different protein sources**

**Over 40% of global consumers are highly interested in meat alternatives that have the same taste and texture as real meat**

# GROWING CONSUMER INTEREST + ACTION AROUND PROTEIN

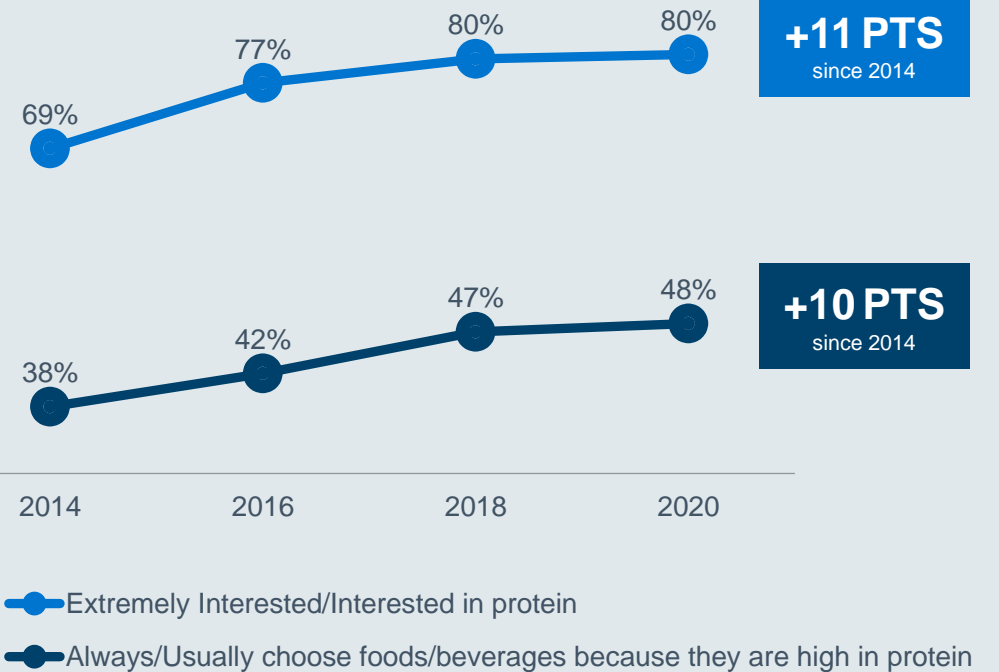
The power of protein remains strong, with interest and action both up 10+ points since 2014. Younger consumers and households with kids are fueling the trend with over 35% saying they have increased protein use over the past two years.

## Increased their use of protein in the past 2 years



## PROTEIN TRENDS: INTEREST + ACTION

\*Global Total



Source: Protein Report, Health Focus International, 2021

\*Global Total: Includes the following core trended countries –

Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Japan, Mexico, Philippines, Russia, UK

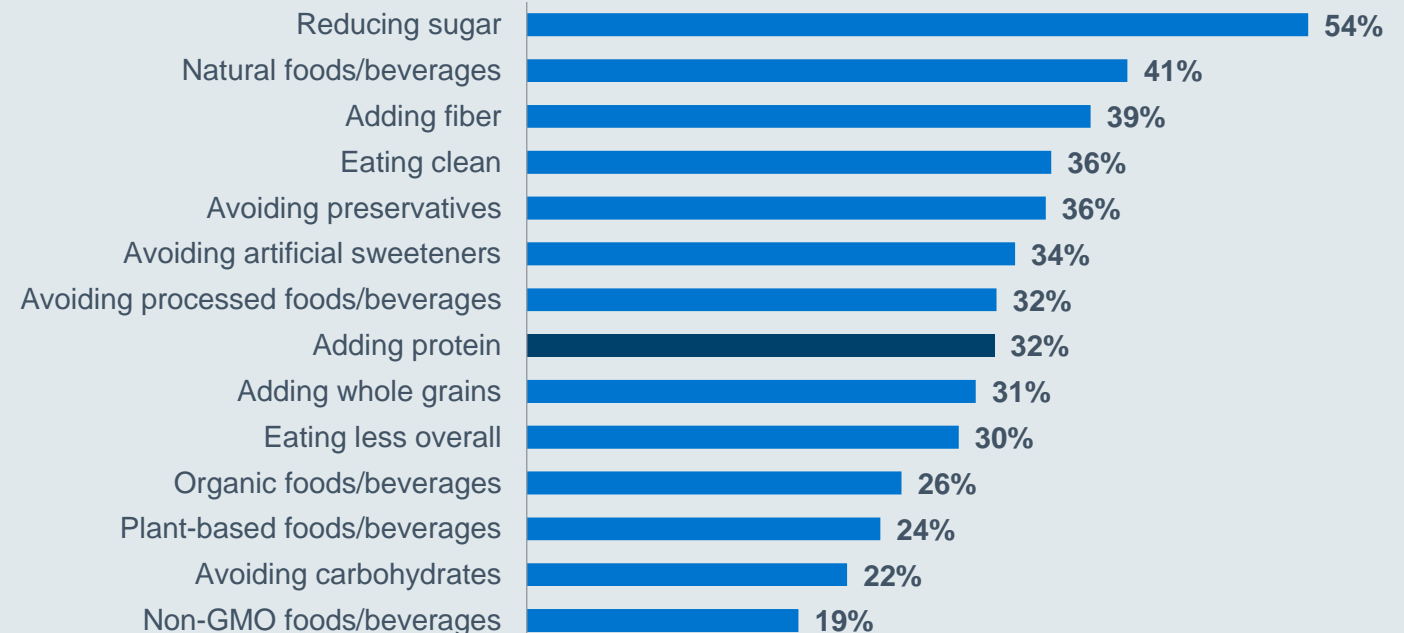
# WHERE DOES PROTEIN STANDS COMPARED TO OTHER MACRO TRENDS?



Nearly one-third of global consumers say adding protein became more important in their diet over the last year, ranking on par with other dietary trends like avoiding processed foods and beverages, avoiding artificial sweeteners, and adding whole grain.

## KEY MACRO TRENDS

Which of the following have become more important in your diet over the last year?



# PROTEIN CORE DRIVERS

Q) Please indicate which of the following are benefits of a high-protein diet

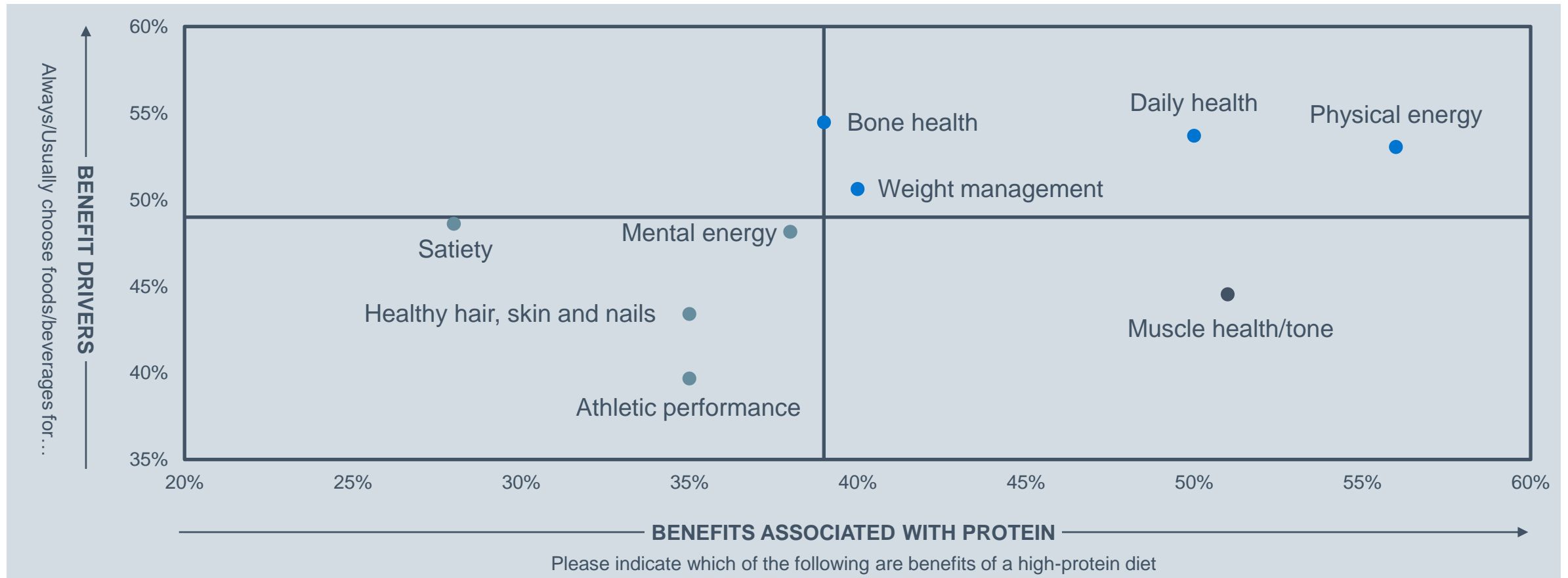
## Protein Positioning Strengthens

The power of protein has strengthened in the minds of consumers since 2018 especially in terms of: athletic performance and recovery, muscle health, managing weight, and mental energy.

Please indicate which of the following are benefits of a high-protein diet *Global Total	2018	2020	Delta (Ranked by Percentage Point Difference)
Physical energy	53%	58%	<b>+5 pts</b>
Muscle health/tone	48%	54%	<b>+6 pts</b>
Daily health	45%	49%	<b>+4 pts</b>
Weight management	35%	41%	<b>+6 pts</b>
Mental energy	34%	40%	<b>+6 pts</b>
Workout/Sport recovery	31%	39%	<b>+8 pts</b>
Brain nourishment	34%	38%	<b>+4 pts</b>
Athletic performance	30%	38%	<b>+8 pts</b>
Bone health	33%	37%	<b>+4 pts</b>
Promotes healthy hair, skin and nails	32%	35%	<b>+3 pts</b>
Satiety	22%	27%	<b>+5 pts</b>

\*Global Total: Includes the following core trended countries – Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Japan, Mexico, Philippines, Russia, UK

# BENEFIT DRIVERS & PROTEIN CONNECTIONS



Source: Protein Report, Health Focus International, 2021



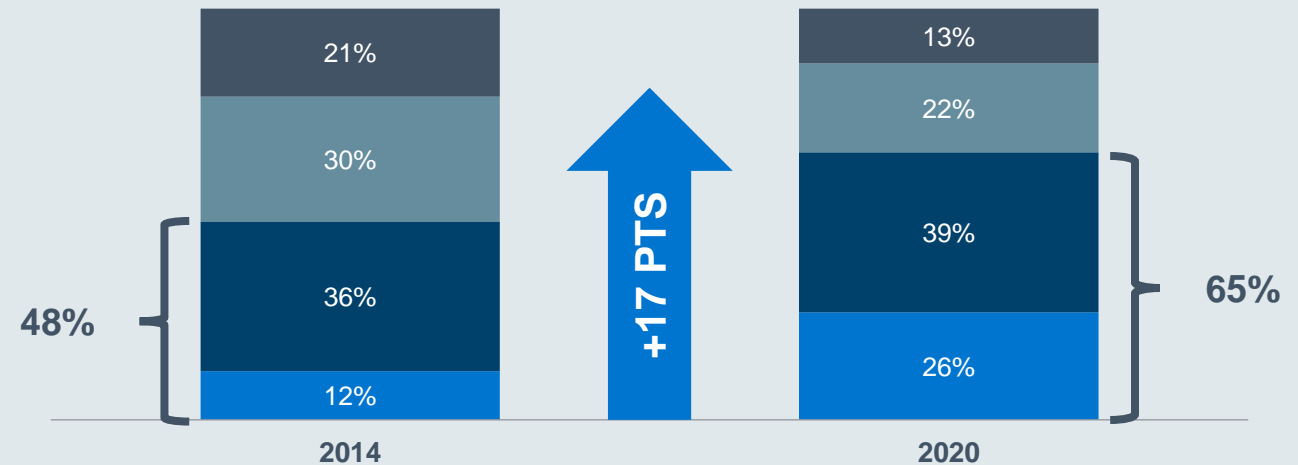
# PROTEIN NEEDS HAVE SHIFTED: IT'S ALL ABOUT THE SOURCE



Globally, the majority of consumers are focused on protein sources, up 17 points since 2014. Over a quarter are now very particular about the types of protein they consume, more than doubling. High protein is no longer enough, it's about the source.

## THE SHIFT IN PROTEIN

\*Global Total



- I pay no attention to protein intake
- I have no preference over the source of protein as long as I get enough protein
- I prefer a combination of different protein sources
- I am very particular about the sources of protein I consume and I avoid certain ones

Source: Protein Report, Health Focus International, 2021

\*Global Total: Includes the following core trended countries –

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# EMERGING CONCEPTS

## Plus Protein on Plant Based Mindful Breakfast

100% PLANT PROTEIN  
MUSCLE MASS GROWTH  
BONES MAINTENANCE

DAIRY FREE  
COCONUT MILK BASED  
PROTEIN+ PLANT BASED  
YOGURT



7g

Per 50g

100% Plant Protein  
Pro Muesli Breakfast Cereal  
(India)



8g

Per 150g

Cocobella +Protein  
(Australia)



Canada

# EMERGING CONCEPTS

Weight Management routine and Muscle Repaired ready for morning workout

LOW CALORIE  
VEGETARIAN  
FRIENDLY WEIGHT  
MANAGEMENT

PLANT BASED PROTEIN  
POWDER FOR NIGHTTIME  
MUSCLE REPAIR



21g

Per 55g

Slim Shake Meal  
Replacement  
(UK)



18g

Per 28g

Vega Sport Rest & Repair Vanilla  
Caramel Flavored Nighttime Plant-  
Based Powder  
(Canada)

# GROWTH DRIVERS AND CONSUMER DEMAND

How Soy Protein have tap into the consumer demand during Pandemic Time



## HEALTH REDEFINED

Self Care  
Balanced Diet  
Prioritized Wellness



## FORMAT AND VERSATILITY

RTD  
On the Go  
Convenience



## CONSCIOUS INDULGENCE

Taste and Texture  
Instagramable  
Guilt Free

## LIFESTYLE TREND

# NEW NOMADS

## Living & working on-the-go

Unconstrained by time, possessions and location, people have become multi-local and multi-layered – fitting from one place to the next and combining remote working and travel into a lifestyle of exploration. People are enjoying increased levels of freedom and flexibility to blend leisure, social and work life from anywhere.

### KEY STATS

**+ 350%**: Increase of Google searches for “digital nomad visa” over the last year (Google Trends, 2021)

**37%** of travellers intend to combine work and travel in the future, up from 19% in December 2020. (G Adventures, Dec 2021)

**84%** of Gen Z and millennials believe working from anywhere is the new working from home (HostelWorld, 2022)

### KEY WORDS

on the go • clockless living • city as your home • new work environments • bleisure • ubiquitous working • digital nomads • cashless society • commuting

**PLANT PROTEIN  
FOR  
FORMAT AND  
VERSATILITY**



**Protein FF NPD in Asia**

**Food vs Beverage  
2018**

**40%:60%**

**2022**

**47%:53%**

**(Mintel GNPD)**

**Amongst Sports Protein  
Nutrition, RTD is the  
fastest growing category  
with 15.8% CAGR in  
Japan. (2021-2024)**

**53% of US  
consumers have  
habits to do snacking  
between meals  
regularly now.**

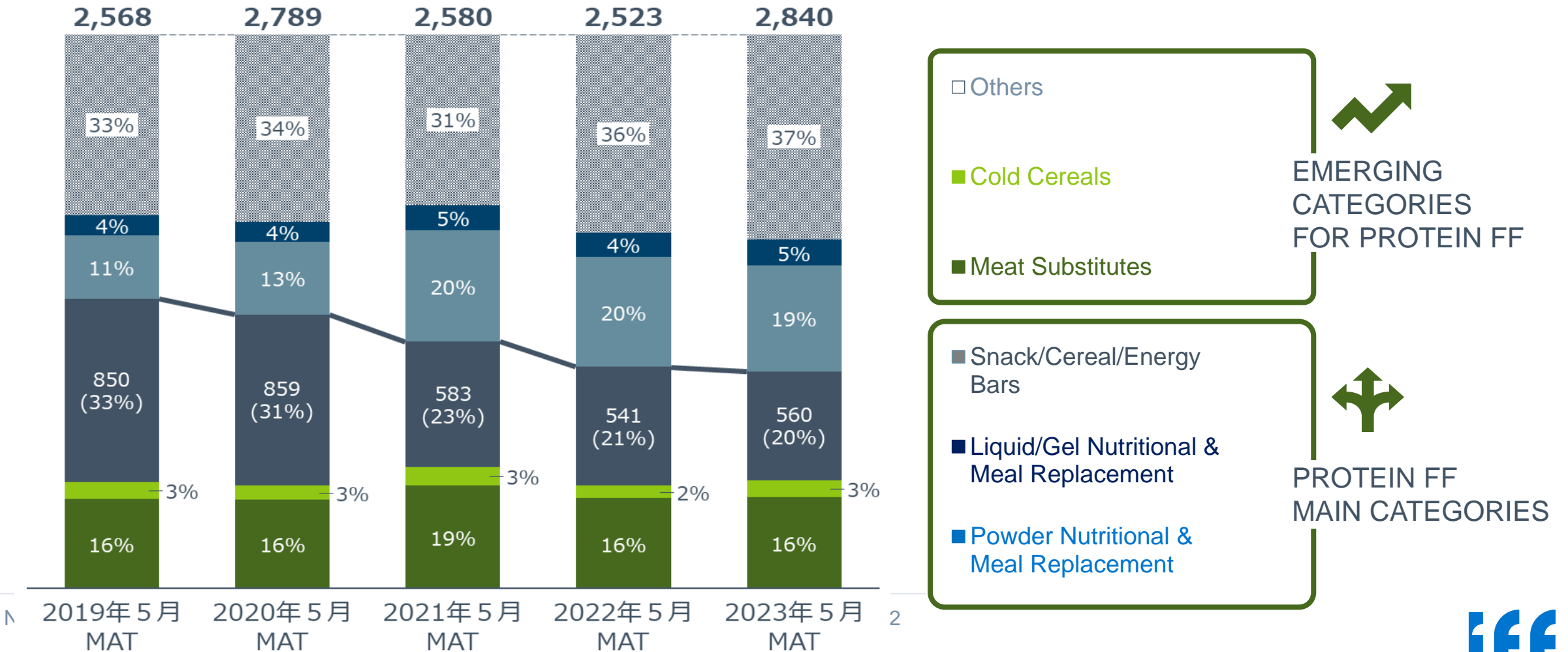
**72% of adults in  
China look for  
snacks made with  
healthier ingredients**

**Protein contents is  
important for 27% of  
US Millennial when  
choosing snack.**

**(Mintel Snacking Motivations  
and Attitudes - US - 2022)**

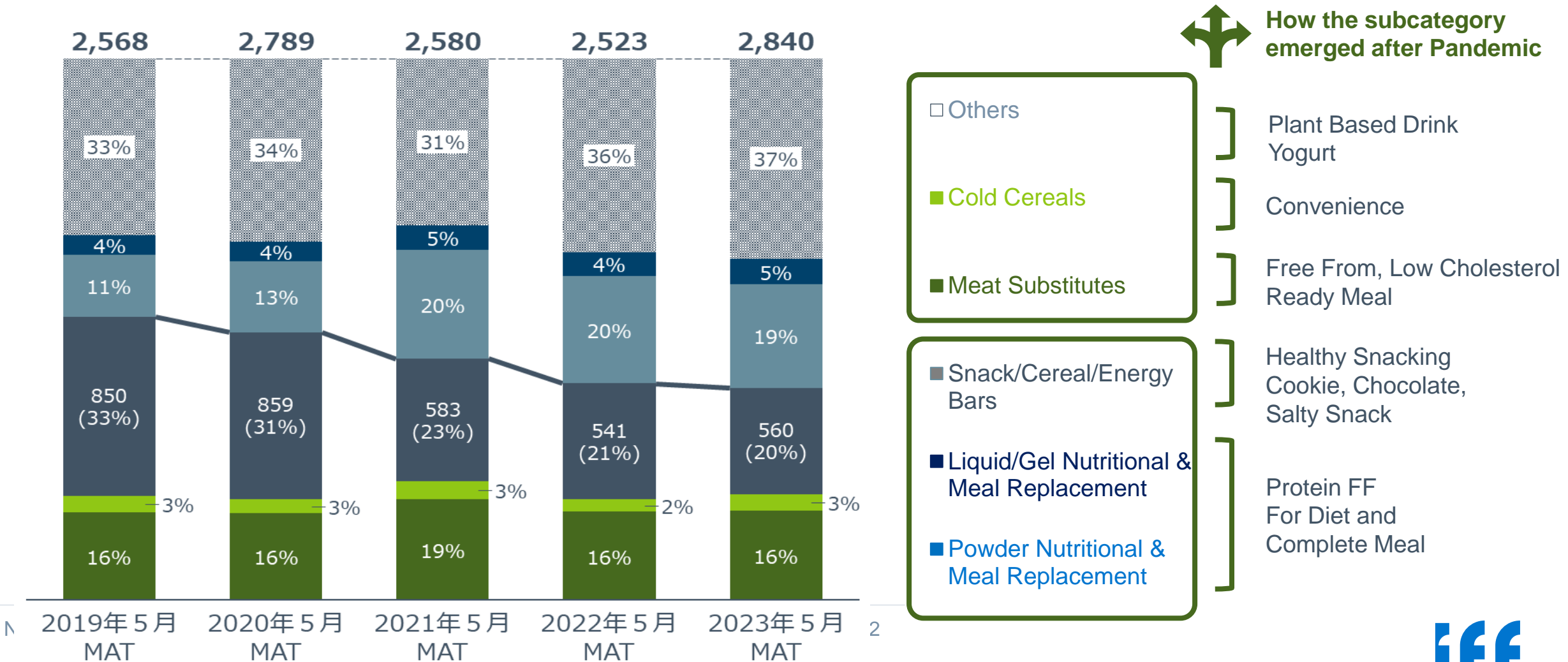
# PLANT PROTEIN CATEGORY DYNAMICS

Protein FF NPD trend shows 2 trend directions



# PLANT PROTEIN CATEGORY DYNAMICS

Protein FF NPD trend shows the disperse of categories with emerging concepts







# 注目のコンセプト

## Weight Management Redefine

PLANT PROTEIN FOR  
SATIETY AND SAVORY

BREAK FAST IMAGE  
FLAVOR WITH YOGURT  
FOR BAR



15g

Per 37g

Herbalife Nutrition Chicken and  
Vegetable Flavor Instant Soup  
(USA)



15g

Per Bar

Atkins Protein  
Meal Bar  
(USA)

# COMPLETE MEAL IN EASY STEP PROCESS

Complete plant protein meal in convenient format

## Why Soylent?

You want to be healthy, you don't have extra time and you don't want to harm the planet. We get it. We create products that deliver complete nutrition in convenient formats so you can get your fill anywhere, anytime, all while maintaining a clear conscience!



**Plant-Based Protein**



**Vitamin & Minerals**



**Slow Burning Carbs**



**Healthy Fats**



### Complete Meal

No time, no problem! Complete, drinkable meal.



### Complete Protein

Smooth and creamy high protein + nutrition.



### Complete Energy

Brain and body boost without the crash.



# EMERGING CONCEPTS

## Quick Nutritional Meal with Protein Charge



MICROWAVABLE  
NO CHOLESTEROL  
VEGAN READY-MEAL

PLANT BASED  
BALANCED-LIQUID MEAL  
RICH IN PROTEIN



14g

Per serve

Absolute Plant Rice with Stir-fried Plant-Based Minced Meat (Thailand)



34g

Per 500ml

Yfood Vegan Vanilla Flavour Balanced Meal Replacement (Germany)

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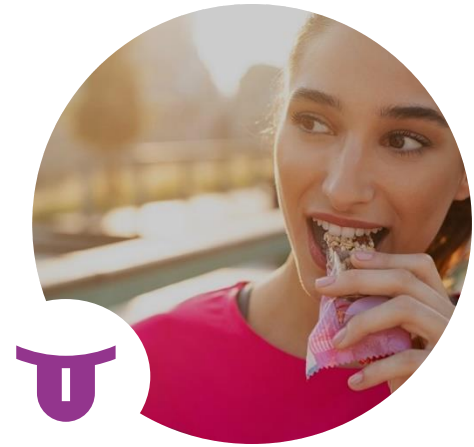
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## FORMAT AND VERSATILITY

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On the Go  
Convenience



## CONSCIOUS INDULGENCE

Taste and Texture  
Instagramable  
Guilt Free

## LIFESTYLE TREND

# HEDONISM & INDULGENCE

Uplifting life with rewarding pleasure, optimism and enjoyment

People seek out happiness and pleasure as an everyday goal to add delight and fun to their lives. They fight for positive ideals, embracing experiences that are uplifting and mood enhancing. Increasingly they are spoiling and rewarding themselves with joyful affordable treats and guilt-free luxury.

## KEY STATS

**45%** of consumers say they plan to live more in the moment and not plan for the long term. (EY, March 2022)

## KEY WORDS

pure fun • pleasure & enjoyment • 'I deserve this' • guilt free • luxury • bingeing • self gifting • affordable treats • satisfaction • joy for life • lustful experiences • sensuality • climax





**74% of UK consumers agree taste is a purchase driver for a premium drink, compared to 39% health.**

**80% of consumers agreed that eating healthy is all about balance.**

**#1 Motivation of Cookie Innovation to trial**

**Healthy Ingredients (44%)**

**57% of US consumers agree that taste is a priority for food, higher than all other attributes including health.**

**Top 3 Important Snack/Energy/Protein Bar Attribute**

- #1 Flavor (17%)**
- #2 Protein Amount(15%)**
- #3 Sugar Amount (10%)**

# EMERGING CONCEPTS

## Indulgent Complete Cookie and Diet Shake

HIGH PROTEIN  
LOW SUGAR BIRTHDAY  
CAKE FLAVOR BAR

BLENDED PROTEIN  
COOKIES & CREAM  
SHAKE

PhD Nutrition

Germany



20g

Per 64g

PhD Smart Bar Birthday Cake  
Flavour High Protein Low Sugar Bar  
(GERMANY)



15g

Per 40g

Optavia Optimal Health  
Cookies & Cream Diet Shake  
(USA)

# EMERGING CONCEPTS

## Savory Guilt Free Protein Snack

HIGH PROTEIN  
NO CHOLESTEROL  
PLANT BASED JERKEY

SOUR CREAM ONION  
FLAVOR UN-FRIED  
PROTEIN CHIPS



9g

Per 28g

**UNLIMEAT**  
Plant Based Jerky  
(South Korea)



15g

Per 40g

**PopWorks Protein Sour Cream &  
Onion Flavour Popped Crisps**  
(Belgium)





# GROWTH DRIVERS AND CONSUMER DEMAND

How Soy Protein have been widely penetrated during Pandemic Time



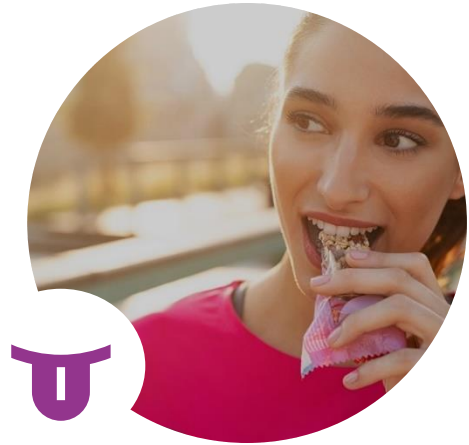
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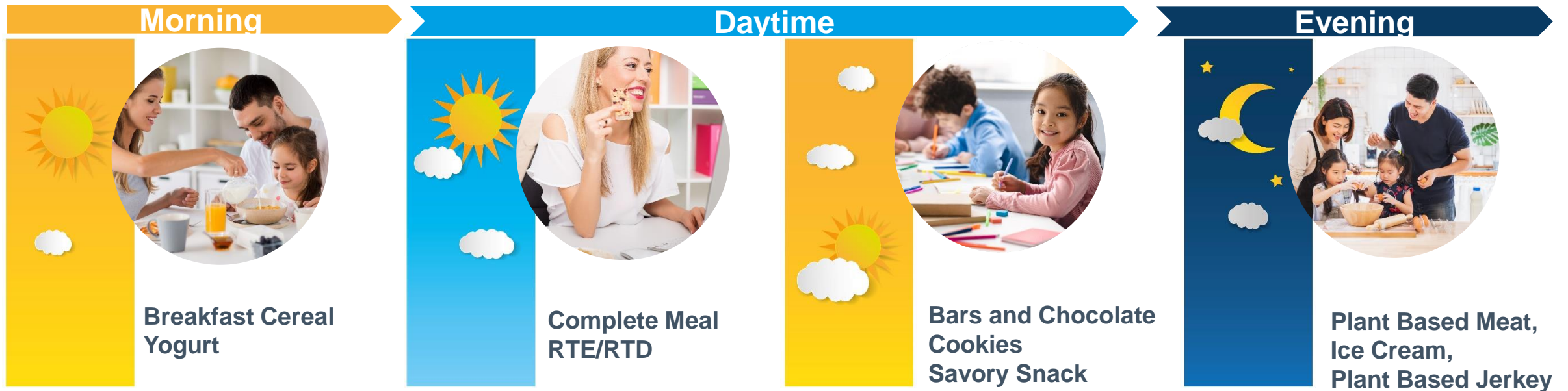
**RTD**  
**On the Go**  
**Convenience**



## CONSCIOUS INDULGENCE

**Taste and Flavor**  
**Texture**  
**Guilt Free**

# DEMAND FOR HEALTHY SNACKING AND BALANCED NUTRITION IN NEXT NORMAL



Busy weekday morning essential Breakfast  
Start the morning by being repaired

Quick Nutritional lunch/snack break  
Quick and easy format for fitness routine

On-The-Go snack Bars for children's

Healthy Indulgent  
Guilt Free Snack

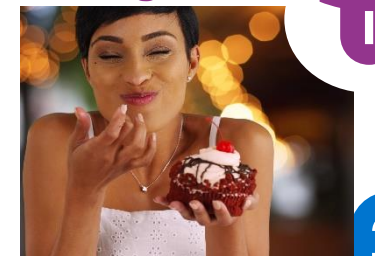
## Health Redefined



## Format and Versatility



## Conscious Indulgence



# PRODUCT PORTFOLIO SNAPSHOT

Variety of plant protein formats to support food & beverage innovation



**Soy Protein Isolates  
(90% Protein)**  
**Soy Protein Concentrates  
(70% Protein)**

Versatile range designed to deliver application-specific functionality



**Pea Protein  
Powders**

83% protein powder



**Pea & Soy  
Protein  
Extruded Crisps  
or Nuggets:**

55-90% protein; adds  
crispy, crunchy texture to  
nutrition bars, cereals,  
snacks



**Textured Soy  
Protein  
Concentrate**

~70% protein; flakes,  
granules, & crumbles.



**Structured  
Vegetable  
Protein**

~58-71% protein – whole-  
muscle like texture in  
shreds, chunks or strip  
formats.

iff

