The Bord Bia Protein Playbook

How to Innovate and Differentiate in the World of Protein

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Why Protein?

Protein is the macronutrient essential for health, growth and repair, made up of amino acids which are often called the ‘building blocks of life’



“The thing about protein is that it is the most important material in the human body, more important than vitamins and minerals.”

Robert H.M – Former Head of New Business Development
DSM Nutritional Products

All human cells and tissues contain protein, therefore protein is essential for growth and repair and the maintenance of good health.

British Nutrition Foundation [1]

Protein provides the body with approximately 10 to 15% of its dietary energy and it is the second most abundant compound in the body, following water.

British Nutrition Foundation [2]

1 & 2 Nutrition Foods and Ingredients, Protein, British Nutrition Foundation website, 2017



We have found protein from a variety of sources throughout our history

From the earliest hunter-gatherers, a variety of sources of protein have bolstered human nutrition, helped our growth and strengthened our defences.

"Protein does not always mean meat - in low income countries only 3% of total dietary energy is derived from meat and offal, 11% from roots and tubers, and 6% from pulses, nuts and oilseeds."

British Journal of Nutrition, 2012 [1]

Insects currently supplement the diets of around 2 billion people and have always been part of human diets in Asia, Africa, and Latin America.

UN, 2013 [2]

Eating meat is thought to have been crucial to the evolution of our ancestors' larger brains about two million years ago.

National Geographic, 2013 [3]

1. "Dietary Protein Quality and Malnutrition in Africa", British Journal of Nutrition, 2012 | 2. "The latest buzz: eating insects can help tackle food insecurity", United Nations News Centre, 2013 | 3. "The Evolution of Diet", National Geographic, 2013

Today, demand for this nutrient in its many forms is increasing

Given population growth and greater purchasing power in many markets



943 million metric tons

Predicted global protein consumption by 2054 (+1.7% a year from 473 MMT in 2015)

Food law Latest [1]

"The older generation believes that you need larger portions of protein."

Richard Burton, MD at the Irish Institute of Nutrition and Health

As incomes in emerging markets rise, demand for protein will continue to surge; by an estimated 74% for meat, 58% for dairy products and 500% for eggs.

Euromonitor International, 2018 [2]

The demand for meat is noticeably soaring at a global level

By volume, meat continues to be the dominant, traditional source of protein

Overall, meat consumption is growing at a steady pace globally - Asia Pacific, the Middle East, Africa and Latin America are expected to drive growth in meat from 2016 to 2021, accounting for 85% of absolute global volume gains.

Euromonitor International, 2018 [3]

Meat demand is associated with higher incomes and urbanisation, as food consumption shifts to favour proteins from animal sources in diets.

United Kingdom Country Health Profile, OECD, 2017[4]

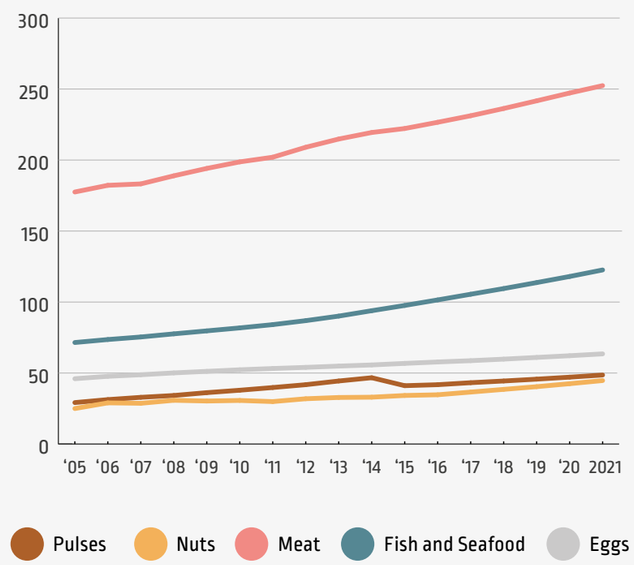
Meat production is expected to grow by 60-70% over the next 30 years.

UN FAO, 2011 [5]

MEAT +42%

Predicted growth in volume of meat sold between 2005 and 2021

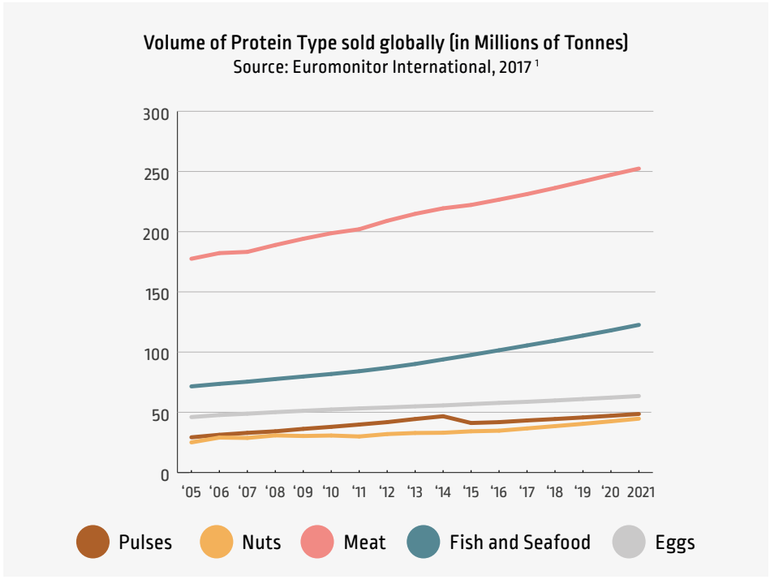
Volume of Protein Type sold globally (in Millions of Tonnes)
Source: Euromonitor International, 2017 [6]



1. "New Food-Tech Platform Optimizes Protein Cultivation", Food Law Latest, 2015 | 2. Plant-based Protein: Assessing Demand for Sustainable Alternatives" Euromonitor International, 2018 | 3. Food, Beverages and Tobacco Global Report, Euromonitor International, 2018 | 4. "United Kingdom Country Health Profile", OECD, 2017 | 5."How to feed the world in 2050", Food and Agriculture Organization, United Nations, 2011 | 6. Economies and Consumers annual data, Euromonitor International, 2017

However, other sources of protein show more rapid growth than meat, globally

In recent years, demand for meat has reduced in many developed markets



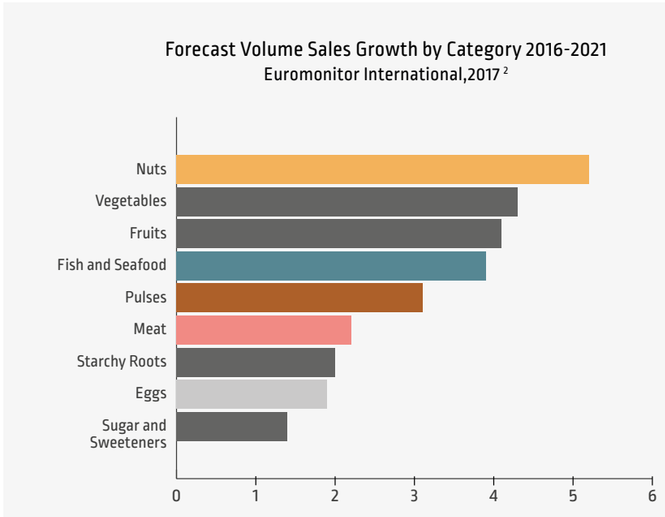
Growth from 2005 to 2021

MEAT +42%

EGGS +38%

FISH +71%

PULSES & NUTS +72%



In western Europe, the volume of meat sold fell by 3% between 2011 and 2016.

Beef and veal, which accounted for 21% of total meat sales in Western Europe in 2016, was worst hit, shrinking by 8% between 2011 and 2016, amidst mounting health concerns linking beef, the archetypal red meat, to cardiovascular and digestive disorders.

Euromonitor International, 2018 [3]

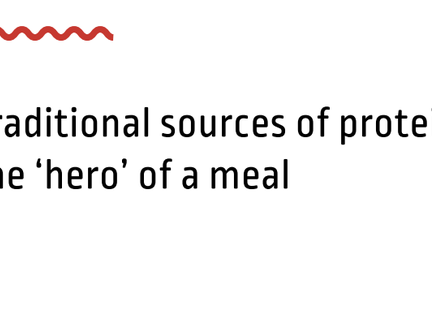


1 & 2. Economies and Consumers annual data, Euromonitor International, 2017 | 3. Food Beverages and Tobacco Global Report, Euromonitor International, 2018

Protein on our plates

Let's consider the shape of yesterday's plate...

Traditional sources of protein were the 'hero' of a meal



Initiatives like "Choose My Plate" by the US government encourage consumers to plan the composition of their plates of food by nutrient group. Within these, protein has a reserved space. [1]

"'What are we having tonight?'

'Chicken'. The type of protein we were having used to be enough of a description of our meal."

Richard Burton, MD at the Irish Institute of Nutrition and Health

Dietary guidelines advocating balance came into play through the last half of the 20th century, and were seen as the ultimate authority on meal planning



Average size of dinner plate sold in the UK in 1950: 25cm

British Heart Foundation, Portion Distortion Report 2013 [2]

Average weight of a shepherd's pie ready meal in 1993: 210g

British Heart Foundation, Portion Distortion Report 2013 [3]

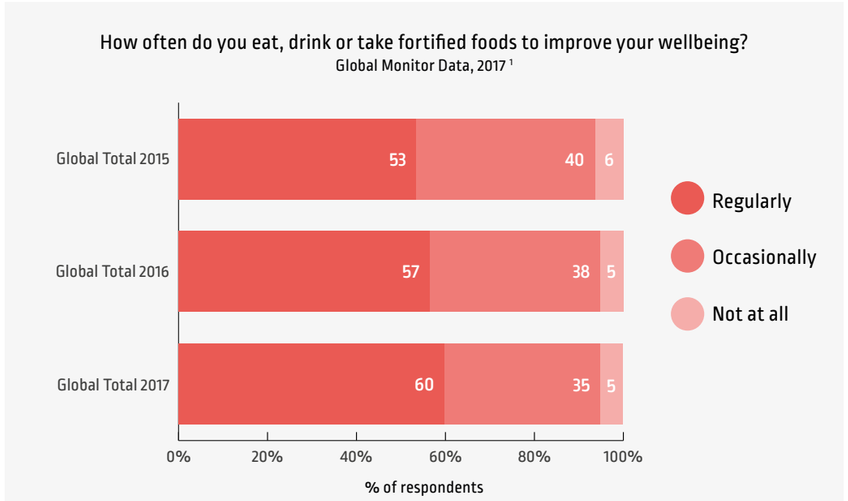
Average time spent preparing dinner in 1980: 60 minutes

British Heart Foundation, Portion Distortion Report 2013 [4]

1. Choose My Plate, Dietary Guidelines for Americans 2015-2020, Unites States Department of Agriculture | 2, 3 & 4 British Heart Foundation, Portion Distortion Report 2013

The size and make-up of plates today is quite different

Snacking is rife, choice is abundant and not always ‘healthy’, and traditional sources of protein fall out of favour in some geographies



66% of consumers agree protein alternatives are healthier than red meat

“I occasionally like to have meat-free days”
– 31% of US consumers agree[2]

In developed markets, dairy consumption has fallen:

Americans drink 37% less milk than they did in the 1970s, and in the UK dairy consumption has fallen by a third in the past 20 years[3]

$630bn expected value of the global snacks market by 2020, 5% CAGR 2016-2020[4]

Average size of dinner plate sold in the UK in 2013: 28cm

British Heart Foundation, Portion Distortion Report 2013 [5]

Average weight of a shepherd’s pie ready meal in 2013: 400g

British Heart Foundation, Portion Distortion Report 2013 [6]

Average time spent preparing dinner in 2013: 20 minutes

British Heart Foundation, Portion Distortion Report 2013 [7]



The rise of flexi, veggies and vegans

In France 13% of 16-24 year olds identify themselves as vegetarian, followed by 11% in Italy, 8% in Spain and 11% in Poland.

The picture is similar for vegan consumers aged 16-24, with 12% of this age group in France following this diet, followed by 9% in Italy, 7% in Spain and 10% in Poland.

Mintel, 2017 [8]

1. Global Monitor Data, Kantar Consulting, 2017 | 2&8. “Meat-free days is the top reason for eating protein alternatives among us consumers”, Mintel Press Office, 2017 | 3. Data from the United States Department of Agriculture, quoted in “The mysterious case of America’s plummeting milk consumption” published by The Washington Post, 2014 | 4. “The global processed snacks market”, Technavio ,2016 | 5, 6 & 7 . British Heart Foundation, Portion Distortion Report 2013 | 8. “Germany hosted the highest number of vegan launches worldwide in 2016”, Mintel Press Office, 2017

And the plate of the future will continue to evolve

Multiple, innovative sources of protein are on our plates and in our pockets



+100 plant-based meat substitutes were introduced in grocery stores in the US in 2015

One Green Planet, 2016 [1]



+10% Global value growth for supplement categories built around protein between 2015 and 2020

Euromonitor International, 2018 [2]

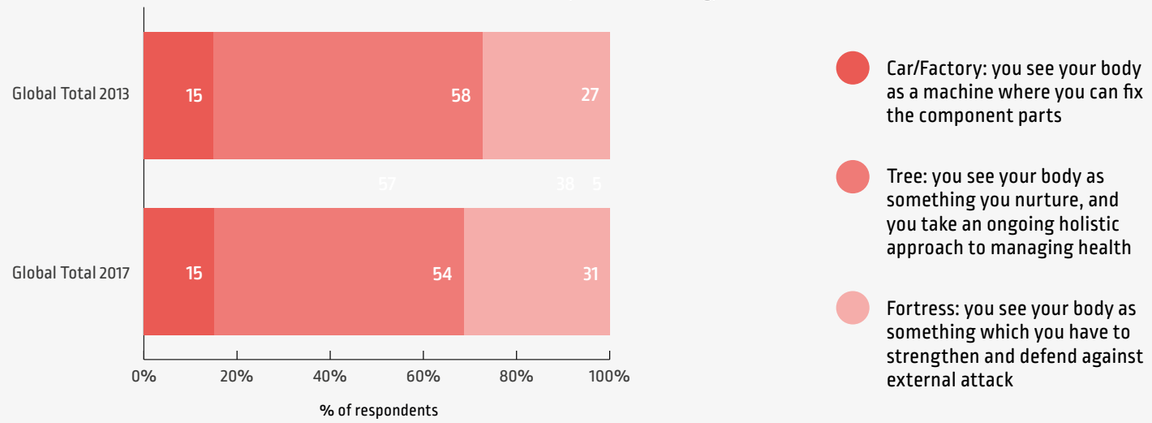


$5.2 billion plant-based meat substitute market global value by 2020

Allied Market Research, 2016 [3]

With more people seeing their bodies as a fortress, protein's strengthening qualities will be seen as a valuable defence

What best describes how you think of your body?
Global Monitor Data, Kantar Consulting, 2017 [8]



1. Products, One Green Planet Website, 2016 | 2. Consumer Health Global Industry overview, Euromonitor International, 2018 | 3. Meat Substitute Market Report, Allied Market Research, 2016 | 4. Protein Market By Application Product And By Region, Trends And Forecasts (2016–2021), Market Data Forecast, 2017 | 5. "Sales of hot cereals in Germany grows by 12,000 tonnes in three years", Mintel, 2015 | 6. Pro Lupine Website, 2017 | 7. " Global Hemp Protein Market " Spire Market Research, 2017 | 8. Global Monitor Data, Kantar Consulting, 2017

Game-changing protein ingredients

Casein

Innovators around the world are playing with this complete protein that can be extracted from any mammalian milk.

The biggest market is Asia Pacific, where casein was worth USD 0.77 billion in 2016 and estimated to be growing at rate of a CAGR of 6%, to reach USD 1 billion by 2021.

Other key regions where it is predicted to grow are Latin America the Middle East and Africa.

In Latin America, the casein market was worth USD 420 million in 2016 and estimated to be growing at a CAGR of 5%, to reach USD 540 million by 2021.

The Middle East and Africa Casein Protein Market was worth USD 280 million in 2016 and estimated to be growing at a CAGR of 5%, to reach USD 350 million by 2021. [4]

Ancient grains

Higher protein grains like amaranth, quinoa and millet have the potential to revolutionise an unhealthy snacking and breakfast market. One in three German consumers already claim to consume protein-fortified / high protein breakfast cereals or porridge. [5]

Algae

The nutrient-dense 'super crop' can be modified to yield higher levels of protein than soybeans, is more soluble, and has a better sensory profile.

Hemp & lupine

The chemical make-up of hemp means it can be both powder and oil, and in all its forms is a rich source of protein, omega 3 and 6 fatty acids. Lupine is similarly versatile and in powder form, is more than 90% protein.[6] These wonder-ingredients' uses aren't restricted to food and drink, they will make their way into the cosmetics category too. By 2020, the hemp-based product market will hit $1.8bn in the US alone. [7]

Navigating the protein landscape today

The need for innovation in protein becomes urgent as health concerns grow, particularly in emerging markets

As obesity overtakes hunger as the most dominant global nutrition concern, the spotlight falls on protein



It is not the amount of food, but the type of food we are eating that is a growing concern. Many countries, such as the UK and Germany, eat twice the recommended amount of protein per capita per day, but the majority is dairy or animal-based which is consumed within higher fat and sugar products.

Euromonitor International, 2017[1]

Diabetes now affects 415 million adults around the world. Measuring and tracking health and fitness is a growing demand from consumers worldwide.

International Diabetes Federation, 2017[2]

In China, the government is estimating it will spend $47 billion per year treating obese patients by 2030, which could easily overwhelm the health care system.

IMF, 2017[3]

1. Plant-based protein: assessing demand for sustainable protein alternatives, Euromonitor international 2017 |
2. International Diabetes Federation 8th Edition, 2017 | 3 "From Hungry to Hefty – Finance & Development, IMF, June 2017

But with increased protein production and consumption, there will be greater pressure on resources in all markets



1. World Population Prospects: The 2017 Revision, UN Department of Economic and Social Affairs, 2017 | 2. National Geographic, The Evolution of Diet, 2013 | 3. Farmageddon: The true cost of cheap meat, 2014 | 4. "A Burger that could save the world", The Week, October 2017 | 5. Warning to Humanity – Second Notice, republished by Greenpeace, 2017

Consumers are demanding more of everything in their diet, but mostly more protein, posing huge environmental risks and ethical questions due to the intensity of the farming and production of protein sources and products

Trends towards 2050 predict the global population to be 9 billion people. Scarcities of agricultural land, water, forest, fishery and biodiversity resources, as well as nutrients and non-renewable energy are foreseen.

The UN, 2017[1]

The foods we choose to eat in the coming decades will have dramatic ramifications for the planet.

National Geographic, The Evolution of Diet, 2013[2]

Households in the UK are wasting around 570,000 tonnes of fresh meat each year, with a value of £1,300 million, that's about 50 million chickens, 1.5 million pigs, and 100,000 beef cattle.

Farmageddon, 2014[3]

"What I came to realise is that if I found a cure to cancer, it would do less for the world than if I improved the environmental sustainability of the food system."

Patrick Brown, Inventor of the Impossible Burger[4]

In November 2017, 15,364 world scientists signed a "Warning to Humanity" calling for, among other things, drastically diminishing our per capita consumption of meat.

Greenpeace, 2017[5]

These pressures mean the imperative for innovation has never been greater

Manufacturers and brands are pushed to innovate ways around scarcity, and make improvements to cost and taste

Technology to avoid contaminated meat from entering the supply chain, for example smart fridges that send you alerts when you need to eat your meat, will help to contribute to less waste.

Waste Resources Action Programme, 2016 [1]

Food security standards are getting more stringent year-on-year to ensure safer supply of food to individuals.

Report Linker, 2017 [2]

“Regulation has improved: claims are upheld, which is great for the market’s quality.”

David Carey, MD at NutraCoPack



1. “Our Vision” WRAP (Waste Resources Action Programme), 2016 | 2. Rapid Test Market - Global Forecast to 2022, Report Linker 2017

The imperative to innovate is clear

The need to differentiate has never been greater

As the mass market becomes saturated with protein-related claims, we may be reaching ‘peak protein’



“Protein has become a blanket phrase synonymous with ‘health’; overuse of the ‘high protein’ or ‘source of protein’ label could result in the reduced consumer perception of value.”

Simon Billing, Principal Sustainability Advisor, Forum for the Future

The number of food and drink products launched in the UK with a high-protein claim rose by 97% between 2014 and 2015 and 498% between 2010 and 2015.

Mintel, 2016 [1]

Protein enhancement has gone mainstream as consumers swap high-carb, high sugar diets for protein packed pizzas and porridge to stay fuller for longer. Either for their health or to lose extra pounds.

The Grocer, 2015 [2]

1. Global New Products Database, Mintel, 2016 | 2. “Trend of the year: Protein”, The Grocer, 2015

A saturated protein marketplace requires differentiation

Consumer expectations around protein offers are higher than ever, so the label of ‘protein’ itself requires some kind of added value; alone it is no longer enough

Superfood 2.0

We live in the age of miracle powders, constantly searching for the most nutrient-dense on the planet, freeze dried and fine milled.

Marketed to us as magic bullets, full of enzymes, antioxidants, vitamins and minerals.

We want our food to provide tangible benefits, from balancing hormone and blood sugar levels to aiding and preventing chronic conditions such as diabetes, cancer and dementia.

The Daily Telegraph, 2014 [1]

Higher transparency

Hyperspectral sensors are rapidly decreasing in size and price. Within a couple of years they will be available at a consumer level, integrated into devices such as smartphones, empowering people to see beyond the borders of human vision.

Food quality and nutritional composition will then be assessed in real-time in supermarkets and restaurants.

Impact Vision [2]

The opportunity is huge...

...but in order to realise it, you need to think more strategically about how you show up in this crowded market

$58.49 billion

Projected value of the protein ingredients market by 2022, +6.0% from 2017

Markets and Markets, 2017 [3]

“I see so many high-in-protein products these days, from baguettes to brown sauce, but I don’t really know if they are any better for me than what was on offer five years ago”.

Jenny, 24, UK Cultural Streetscaper

1. “From whey protein to spirulina: are superfood powders set to be as popular as the Paleo diet?”, The Daily Telegraph, September 2014 | 2. Impact Vision, Software Platform focusing on food standards transparency using image recognition | 3. “Protein Ingredients Market by Source, Application and Region - Forecast to 2022”, Markets and Markets, 2017

This is a guide on how to innovate and differentiate in protein

Developed in partnership with Kantar Consulting, it identifies a set of opportunities for Irish businesses to capture protein's potential

How did we get here?

An audit of trends at macro, category and consumer levels, along with expert interviews and Streetscaper perspectives informed the Pathways and Opportunities in this guide



Meet our Cultural Streetscapers

Cultural commentary and examples from our leading edge Streetscapers provided us with market-specific manifestations for the Protein Playbook

Cultural Streetscapes at Kantar Consulting goes beyond typical trendspotting. Members of the Streetscaper network are experts on local culture and leading edge brands and can explain the “why” behind the astonishing boom in the global protein market.





Stylés
Los Angeles, USA

I am a creative strategist, market research analyst, and critical cultural theorist. I have refined expertise in disciplines including strategic branding & marketing, advertising, mass media effects, semiotics and behavioural economics.



Marcel
Dublin, Ireland

I am a writer, translator and editor, sharing my time between Ireland and Germany. I mainly write about travel, e-commerce and history. I also work as the book editor of the Elsewhere Journal, and have written articles and essays for the Daily Telegraph, the Guardian, the Irish Times, the Matador Network and CNN Travel.



Jenny
London, UK

I am a strategy consultant, living in London. I have shaped my career around the study of trends and the cultural behaviours surrounding them. I am particularly interested in the arts and culinary worlds.



Paul
Berlin, Germany

I am a born and bred German with an international lifestyle. Raised in Berlin, I started my career in the Netherlands, with a French girlfriend and friends from all over the place. This makes me a curious, multi-faceted thinker, creator and maker.



Danjue
Beijing, China

I have worked in finance for more than four years. I love studying cultural differences and talking with people from different cultural backgrounds. While in college, I specialised in analysis and research of cultural themes for seminars and theses, such as Chinese teenage immigrants in Germany or the Chinese image in German media.

Meet our Industry Experts

We interviewed ten experts, from food scientists and nutrition innovators to breakthrough brand-builders, uncovering what's new and what's next for protein globally

Our experts are all highly informed and heavily involved in shifting and shaping the protein landscape in their respective markets.

Beyond Meat, US

Jerry Joyce, Chief Operating Officer

Producer of plant-based meat substitutes. Joyce oversaw all product development and controlled the supply chain for the firm in both manufacturing and distribution.

Irish Institute Of Nutrition And Health

Richard Burton, MD

Burton conducts academic training in health & wellness, helping nutritional coaches and therapists understand trends and challenges in the space. Burton can comment on the priority for development in food and nutrition in Ireland and on other innovative protein uses.

Nutra Co Pack, Ireland

David Carey, MD

Carey was named Kildare's best young entrepreneur in 2014. He currently manages a manufacturing plant for sports nutrition supplements, where they undertake every aspect of a product idea; from product formulation, all the way to delivering the finished item.

Konzept Nutrition Germany

Rainer Zirkelback, General Manager

Zirkelback has 25+ years experience in the functional food market and is well placed to comment on recent developments in nutrition. He currently works with protein raw material suppliers (for rice, plant, milk, etc.) and can elaborate on how he sees these markets developing over the next few years.

Sheng-Hua International Anti-Aging Institution, China

Ping Guo PhD, Research Director and Vice President

Guo is also the Founder & President at Beijing Augeas Life Science Management Group, which is one of the major consulting groups focused on food and science in China. Guo is familiar with the latest nutrient and food trends in China and is able to discuss how protein fits into the general public's day-to-day diet.

Meet our Industry Experts

Forum For The Future, UK

Simon Billing, Principal Sustainability Advisor

Forum for the Future is a non-profit organisation working with businesses and governments to address sustainability issues. Billing currently leads the Protein Challenge 2040, an international multi-stakeholder project aiming to transform how protein is consumed and produced within environmental limits.

Oomi Noodles, UK

Simon Day, Founder

OOMI are low-carb, gluten free, and the first fish protein-supplemented noodles brand that are sold across the UK. Day is responsible for running the food insights department at Winterbotham Darby a UK award-winning retail and food service supplier.

DSM Nutrition, Germany

Robert Van Den Heuvel, Former Head New Business Development

Van den Heuvel was responsible for the mapping of landscape, target groups, distribution channels and growth opportunities in countries, such as SE Asia, China and Africa. He developed multiple anti-aging business concepts and can discuss the nutritional ingredients used in anti-aging food products.

PowCow, Ireland

Niall Moloney, Founder

Moloney is a dietician who specialises in sports and exercise nutrition so his world generally revolves around healthy eating. He developed PowCow, a high protein, reduced fat, reduced sugar, frozen yogurt.

The Protein Works, UK

Nick Smith, Founder and Former MD

Smith is currently an investor in the nutrition space, keeping watch on start-ups developing innovative nutrition-supplemented food products.


Protein Goes Social
Personalised & Specialised
Democratised Performance
THE NEW PERFORMANCE
Age Appeal
The Growth of Niches
FIT FOR ME
Fill Up, Slim Down
Vertical Integration
Traceable Proteins
SMARTER SUPPLY
Strip Out & Streamline
The 5 Pathways and Opportunities at a Glance
Wider Availability
PICK ME UP PROTEINS
Crafted Indulgence
The Anti-Sweet Movement
PROTEIN PREMIUMISATION
High-Profile Heritage
Plant-Based Prestige
Pure, Clean Protein

1. The New Performance

Aspirations to peak physical condition enter the mainstream

What's the story?

From its beginnings in niche muscle-building circles, the protein supplement category has adapted to meet a plethora of exercise regime needs and physique aspirations.



$10.6bn
Market value of the global sports nutrition market.

Euromonitor International, March 2016

"Protein drinks and pills in powder form have come under scrutiny as data suggests consuming protein in unnaturally concentrated forms causes damaging effects on the digestive system, leading to a return to natural whole foods high in protein."

Styles, 38 US Cultural Streetscaper

Yesterday

High calorie, no or low-taste solutions for building big muscle - used by niche communities of hardcore muscle performance enthusiasts.

Today

Widespread innovation in the supplements space, for a greater range of people inspired by online bodies and personalities.

Tomorrow

'Physical performance' is a social status symbol with a variety of associations from strength to flexibility and fast-twitch muscle fibres; performance nutrition is democratised and suits diverse needs.

How is this opportunity manifesting around the world?

We identified three expressions of The New Performance:

Personalised & Specialised

Protein propositions for an ever greater and more sophisticated range of individual physical goals are made possible by technological and chemical innovations

Protein Goes Social

Social media sharing is fast becoming the key driver of protein for performance, with brands organically building success via networks of influencers. Followers are engaging with brands and products that promise peak physical condition as part of a ‘personal brand’

Democratised Performance

Innovative, gender neutral formats - beyond traditional supplement shakes, are making protein accessible to the active masses, who would have previously seen performance nutrition as complicated or irrelevant

Personalised & Specialised

Protein propositions for an ever-greater and more sophisticated range of individual physical goals are made possible by technological and chemical innovations.

as simple as...

...as stretchy as



What:

Fresh Fitness Food offer meticulous personal plans composed by nutritionists, cooked by highly acclaimed chefs and delivered to your office.

Why:

FFF's premium service offers a highly personalised and convenient meal plan in conjunction with fitness/workout guidance centered around the appropriate daily intake of protein for the client.



What:

Foodloose SMU:DI, Cacao Sour Cherry Vanilla Raw Smoothie Bar.

Why:

As a 'specialist smoothie bar', this product blurs the boundaries between a snack bar and an energy gel and is designed for post-workout recovery. It is a natural and raw food bar with a soft texture and contains both chia and baobab, two increasingly popular 'super' ingredients.



What:

Create your Own Powder by The Protein Works allows consumers to curate their own blend of protein powder.

Why:

The service allows users to create the perfect product tailored specifically to their body and training needs, as well as their personal tastes. Customers can save the blend specifications and share them on social media, building more expert communities and educating others.



What:

Arla Hydrolysed Whey Protein produces smaller peptides which are more easily absorbed during digestion.

Why:

Arla's innovation investments into Lacprodan means faster absorption of amino acids, improving the rate of muscle recovery time, fuelling the performance of super discerning consumers.

Images used are for illustrational purposes only and are not of a specific product or company, or in any way representational unless otherwise stated

Protein Goes Social

Social media sharing is fast becoming the key driver of protein for performance, with brands organically building success via networks of influencers and followers, engaging with brands and products that promise peak physical condition as part of a ‘personal brand’.

as simple as... ...as stretchy as



What:

LDN Muscle is a protein supplement brand focused on guiding consumers along a fitness journey and encouraging them to share it online.

Why:

LDN Muscle identified the overwhelming traction consumer transformation posts were receiving online, offering a platform for inspiring stories to be shared, and branching into fashion retail with a post-transformation clothing range too.



What:

Crunch Gyms has released 93 Foursquare ‘tips’ in New York City, ranging from best products for protein content at movie theatres, restaurants and airports, to suggesting that you take the stairs at Grand Central Station to burn some extra calories. When you “check in” to any of their tips, you received offers/discounts/benefits tailored to you.

Why:

Completing Crunch ‘tips’ is like earning additional social currency for users to share and compare fitness achievements on social media outside of the gym.



What:

SCiO scanner detects the molecular signature of your food and then sends the details to your smartphone. Users can then choose to share their ‘macros’ data with friends or publicly on social media building up a community of like-minded aspiring nutritionists.

Why:

SCiO removes the guesswork for an increasing number of consumers counting ‘macros’ (i.e. carbs v fat v protein) and makes that information easily shareable within their networks.

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Democratised Performance

Innovative, gender neutral formats, beyond traditional supplement shakes are making protein accessible to the active masses, who would have previously seen performance nutrition as complicated or irrelevant.

as simple as...

...as stretchy as



What:

Royal Green Whey Protein contains organic ingredients with maximum bioavailability (i.e. ability to be absorbed in digestion and delivering all the important amino acids).

Why:

As exercise enthusiasts become a more diverse target group, they don't want to compromise on the quality of the protein in their shakes, even if it is in processed powder form.



What:

Vifit Sport is a sporty but modest food brand with a diverse portfolio: from bars and on-the-go yoghurts, to protein powder and isotonic drinks.

Why:

It remains firmly a fitness product but aims to educate consumers new to the supplement world, with products that integrate seamlessly as replacements for other snacks.



What:

Creation Nation is a 'dry mix' manufacturer creating different flavoured, protein-high grain, seed, nut and supplement mixes. Consumers can tailor to their own preferences by choosing what wet ingredients to add, what form to eat them in and how to cook them.

Why:

Creation Nation was founded in the backlash against protein drinks and shakes in the US, which many thought unbalanced consumers' diets. Through their products, the 'average Joe' can get creative with a product that has a more complete nutritional profile.

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Pathway 1: The New Performance

How might our focus categories capitalise on this opportunity?

Meat

Educating consumers new to exercise and performance nutrition on ‘complete’ versus ‘incomplete’ proteins, and the nutritional composition of leaner meats (including protein-rich offal) can unlock growth in the category.



Heck Sausages advertise as lean, gluten free, dairy free and high in protein.

Seafood

The number of protein seekers looking to widen their post-gym meal repertoire is increasing and this is where seafood holds significant capacity to grow. Outside of salmon and tuna, there is still work to do to get other species at the forefront of post-gym recipe creation.



Sardines are rich in omega-3 and protein, presenting a real opportunity for better communication around their performance-enhancing qualities, as well as better packaging for post-workout consumption.

Beverages

From on-the-go coffees to highly specialised shakes, high protein drinks continue to hold a prominent place in the sports nutrition category. RTDs should seize the opportunity presented by emerging, convenient channels beyond traditional retail i.e. office subscriptions, gyms.



Protein20 offers a highly specialised product in a convenient format. Ready to drink, cold, refreshing protein drinks present a low-calorie healthy alternative to sugary fizzy drinks.

Luxury/Artisanal

Opportunities within Luxury emerge as the market polarises. Powders and supplements can premiumise by answering to demands for personalisation and “instagrammability”.



DIY protein mixes that blur the boundaries of performance nutrition and ‘food art’ are achieving unprecedented levels of social engagement online.

Dairy

Playing up dairy’s credentials as ‘naturally high in protein’ will help introduce less adventurous consumers, as well as those avoiding the artificial, to the high-performance world with milks, yoghurts and cheeses.



Powerful Yoghurts use traditional formats and flavours (Greek Style, blueberry, vanilla) but by adding the high protein label encourage a different usage of a staple household product, beyond a family tub into functional and super-charged.

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2. Smarter Supply

Environmental and ethical pressures become opportunities for innovators

What's the story?

Protein sources and supplies are increasingly coming under scrutiny, posing a threat to a number of categories. Innovative players of all sizes are thinking critically about their end-to-end process, embedding efficient, ethical and environmentally-friendly solutions into supply chains and communicating their efforts to discerning consumers.



"In the US our biggest selling point is using grass fed dairy cows."

Niall Moloney, founder of PowCow

1,799 gallons of water are needed to produce 1lb of beef vs 469 gallons of water to produce 1lb of chicken.

"Livestock and Climate Change", Worldwatch, 2009

Yesterday

The age of 'Big Food' saw resources exploited in search of ever greater volumes of traditional proteins, at whatever cost.

Today

Businesses are feeling the pressure of resource scarcity and tightening regulations; more planet-friendly alternatives to traditional proteins become mainstream.

Tomorrow

The origins and embedded resources of protein, in any form, are under intense scrutiny, and smart supply chain innovation is rewarded.

How is this opportunity manifesting around the world?

We identified three expressions of Smarter Supply:

Vertical Integration

Examining the value chain from end to end to spot opportunities for repurposing protein-rich by-products, maximising and extending current capabilities

Traceable Proteins

Taking traceability to the next level by proactively communicating the journey of your protein ingredient / product, to relieve concerns about ethics or artifice

Strip Out & Streamline

Scrutinising the resources embedded within your supply chain, to ‘cut out the protein middle man’ and achieve maximal protein output with minimal input

Vertical Integration

Examining the value chain from end to end to spot opportunities for repurposing protein-rich by-products, maximising and extending current capabilities.

as simple as...



What:

Toast is a bakery which identified the potential for its unsold loaves and crusts.

Why:

Toast uses the waste product to brew its own brand of artisanal, craft beer, opening an additional lucrative revenue stream for the business and minimising their waste.



What:

Arla have ownership of their entire manufacturing chain, specialised factories and formulas.

Why:

The company has built a specialised infrastructure to maximise use of an increasingly valuable and protein-rich by-product – whey – with which they process and fortify other products in their portfolio.

...as stretchy as



What:

ENER-G enables farms to convert their animal waste products into energy (and fertiliser) via anaerobic digestion, to power farm operations.

Why:

Creating this kind of circular economy on farms significantly reduces the environmental footprint of the protein they produce.

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Traceable Proteins

Taking traceability to the next level by proactively communicating the journey of your protein ingredient or product, to relieve concerns about ethics, or artifice.

as simple as... ...as stretchy as

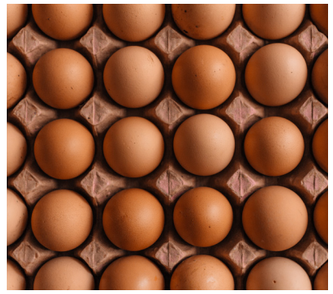


What:

Berlin's Kreuzberg street food market ('Markthalle Neun') was conceived to shorten the chain between producer and consumer.

Why:

Described as the 'epicentre of Berlin's urban food movement', the farmers and meat producers who sell there are an advert for the care and provenance of the products on offer: quality protein without compromise.



What:

Trace my Eggs prints a code on each egg which consumers can scan to find out the method of production, producer identity and quality mark.

Why:

Following the European egg pesticide crisis, Trace My Eggs decided it was critical to empower consumers on every shopping trip they make.



What:

'Moyee Coffee' has harnessed blockchain technology to openly document the transactions throughout the product's value chain - from the farmer who planted the bean to the shipping companies who pick them up and retailers that finally stock them.

Why:

Consumers are digging deeper into sourcing and supply chain, and blockchain enables new levels of transparency that no PR can twist.



What:

ZhongAn Online GoGo Chicken uses facial recognition to track organically farmed chickens they have purchased.

Why:

Although seeming gimmicky, ZhongAn has achieved enormous traction in Asia, with consumers buying a chicken on day one of its life and monitoring its movement and feeding from their smartphones.

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Strip Out & Streamline

Scrutinising the resources embedded within your supply chain, to ‘cut out the protein middle man’ and achieve maximal protein output for minimal input.

as simple as...

...as stretchy as



What:

Ÿnsect farms insects to make high-quality, premium natural ingredients for aquaculture and pet nutrition.

Why:

Recognising that the consumer market for edible insects may still be a distant reality in many geographies, Ÿnsect instead looks to replace animal feed. We currently feed high protein foods to our farmed animals which means significant embedded resources that could be used to feed humans (e.g. soy to cattle, fish to fish)!



What:

BEYOND MEAT have used protein from plants instead of animals to create an innovative burger analogue which even ‘bleeds’!

Why:

The Beyond Meat team manufacture ‘haem’ to mimic the texture of meat protein, appealing enormously to vegetarian consumers who still crave the ‘meat experience’.



What:

Modern Meadow are innovating in bio printed meat, using tiny muscle samples taken from healthy livestock as a base from which to lab-grow tissue.

Why:

Another player looking to reduce the harmful environmental and ethical impact of industrial animal agriculture, Modern Meadow’s products really are biologically identical to meat.

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Pathway 2: Smarter Supply

How might our focus categories capitalise on this opportunity?

Meat

As the meat category comes under ever-greater pressure from a sustainability point of view, farmers and manufacturers who are readdressing every element of their value chain, scrutinising waste and embedded resources, as well as proactively communicating humane treatment, will have greater engagement with conscious consumers.



Spitz und Bube is setting new standards in the humane farming of chickens, refusing to shorten their beaks as is common practice in industrial agriculture.

Seafood

Maximising the efficiency of fish feed or innovating alternatives will reduce the 'embedded protein' within companies' supply chains. Making this supply chain innovation consumer-facing through comms will raise consciousness of a flawed protein system and put proactive companies ahead of the game.



Feed Compass are creating an easy to use tool to determine the most efficient ways of feeding fish and cattle in a sustainable way. Developed by the Forum for the Future Protein Challenge 2040 coalition.

Beverages

From the raw materials used to make the drink, to the percentage of the container made from recycled materials, showing the step-by-step composition of what we choose to drink will become a requirement for consumers.



Amino acid-filled and antioxidant-rich LENTEINTM plant protein powder reuses 98% of the water required to produce it for the next batch.

Luxury/Artisanal

A premium tier of products will evolve as consumers become far more discerning about the supply chain of their food and drinks. From visiting the farm where food is grown to knowing the name and face of producers, luxury goods will need to be traceable every step of the way.



Growing Underground sustainably grow fresh micro greens and salad leaves 33 metres below the busy streets of central London. Creating small-scale farms close to key consumption hubs will answer higher demand for buying local produce.

Dairy

International dairy companies are best placed to benefit from vertical integration strategies to repurpose by-products such as whey to create new revenue streams.



Arla invested 60€ million in a whey processing plant in Denmark to create a highly efficient vertically integrated supply chain.

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3. Protein Premiumisation

Scarcity and ‘foodie-ism’ herald opportunities for premium offerings

What's the story?

With an enormous range of protein-fortified products in the mass market (taking the category to 'tipping point'), there is a significant opportunity in higher value offers. There are many ways in which premium can be communicated, but simply putting the claim of 'source of protein' on a mass market product is no longer enough.



"People are clocking out of meat on the basis of ethics, but high investment in animal welfare schemes and communication around pure quality can counter that."

Simon Day, founder of Oomi noodles

"Consumers in China want to buy the highest quality products, as close to 'as-natured-intended' as possible with all the original benefits of the raw material plus the added assurance of a 'premiumised' brand. That's why you see meat sold in its original shape, like a whole chicken with its head and feet intact, because it suggests it was freshly processed and that the animal was healthy and fairly raised. There's also something premium about doing some of the chef's work yourself..."

Danjue L, 27, China Cultural Streetscaper

Yesterday

Traditional protein forms (meat, dairy) range from value to super premium, with alternative and innovative protein forms inaccessible or unavailable in the mass market.

Today

Protein-fortified products proliferate in the mass market, in a 'race to the bottom', and to compete with traditional forms of protein.

Tomorrow

Winning protein brands must differentiate their offer from the masses, adding meaningful value via luxury or gourmet products and experiences.

How is this opportunity manifesting around the world?

We identified three expressions of Premiumised Protein:

High-Profile Heritage

Heroing the origins of your protein to communicate greater quality and animal or environmental welfare

Plant-Based Prestige

Upping the culinary status of plants as the lead protein ingredient in products and meals

Pure, Clean Protein

Leading with a proposition of purity, stripping out the unnatural and unnecessary for a high end health offer

High Profile Heritage

Heroing the origins of your protein to communicate greater quality and animal or environmental welfare.

as simple as... ...as stretchy as



What:

Carr & Sons is a trusted and long-established Irish producer of organic salmon and shellfish.

Why:

The product range capitalises on the origin and heritage of the brand, painting a vivid picture of the historic Carr family business and the wild nature which fuels their trade through truly design-led packaging.



What:

Nutristrength products are made in Wiltshire in the UK, and the brand mantra is to enhance performance for everyday living, making the most of the great outdoors.

Why:

Steering clear of the 'gym bunny' identity, the brand is firmly set in the British countryside, made from all-natural, fresh and recognisable products that have functional benefits without scientific jargon (such as goat & sheep whey protein). Coupled with clean design this makes Nutristrength a premium choice for discerning and active families.



What:

Wagyu beef scanners take hyper-premiumisation to new levels: a magnetic resonance scanner which can detect the amount of muscle and fat in the high-value cut.

Why:

The amount of fat streaks within the meat is one of the key criteria that determine the taste and value of Wagyu. Providing a precise measure of this allows high quality products to be differentiated and distinguished, as well as allowing macro-counting consumers a very clear picture of their nutritional intake.

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Plant Based Prestige

Upping the culinary status of plants as the lead protein ingredient in products and meals.

as simple as... ...as stretchy as



What:

ChicP, a raw vegetable hummus company derives its products from food waste.

Why:

ChicP have created a sustainable supply chain using unwanted, imperfect raw vegetables that would usually be considered waste. Instead, the vegetables are blended with intense, natural flavours (take beetroot, horseradish and sage), and gorgeously branded to stand out on the palate and on the table.



What:

Daluma is a Berlin-based high-end restaurant and catering service centered around healthy, vegan food. Their bespoke 'Escape the City' food retreats made the Top 10 food retreats on Healthista.

Why:

A fashionable, attractive and culturally relevant antidote to fast-paced eating and drinking, they offer exciting, clean and aspirational plant based meals. Consumers can choose a protein base (lentils, quinoa, tempeh etc.) and protein 'toppers' (hemp, crispy tofu, edamame).



What:

Sgaia Foods are becoming famous for their premium "mheats" that are 100% animal-free – a crafted blend of wheat and soya protein.

Why:

Sgaia describes the process: "just like an artisanal bakery makes its bread, it all starts from a dough, which is then seasoned and cooked differently according to several carefully devised recipes." Sgaia has partnered with several high end restaurants to substitute charcuterie and larger cuts of meat on menus.

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Pure Clean Protein

Leading with a proposition of purity, stripping out the unnatural and unnecessary for a high end health offer.

as simple as... ...as stretchy as



What:

BlackWings meat is organic, non GMO and antibiotic-free meat sourced from select farms across the US.

Why:

Using a back-to-basics approach to farming, combined with punchy and contemporary urban branding, BlackWings' all-natural products are effectively reaching their conscious and affluent target consumers.



What:

Fowey Sea Farms grow shellfish from only natural feed, with non-synthetic materials. From biodegradable oils and materials used in the fishing equipment they mitigate the risk of any contamination.

Why:

Consumers are willing to pay premium for Fowey's untampered, natural growth and reproduction cycles, and for the reassurance that their claims can be validated via the innovative blockchain platform 'Provenance'.



What:

ENERGYBits are one calorie tabs, made from 100% spirulina algae with no caffeine, sugar, chemicals, gluten or soy, for the purest of protein supplements.

Why:

ENERGYbits identified the opportunity within super-premium supplements, and innovated their product so as to introduce superfoods into consumers' diets without 'nasty' collateral.

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Pathway 3: Protein Premiunisation

How might our focus categories capitalise on this opportunity?

Meat

There are some quick wins for the meat category when it comes to premiumisation of protein. Solid animal welfare and natural processes become necessary assurances, and partnerships with conscious and high-end restaurants and events will help build credibility in this area. On the more innovative side, purer protein supplements can be derived from meat than ever before.



ProTake-P is derived from porcine gelatine. It is a natural food ingredient, is GMO free with no allergens and contains 90% protein.

Seafood

Small scale, high-profile heritage fishing will be a key way of unlocking premium value in this category. Informing consumers of the farm's story, processes, species, etc. will allow lesser-known types of fish and seafood to gain prestige and premium status.



The Fresh Cornish Fish Company delivers fresh fish boxes across mainland UK; hyper-convenient and with guaranteed origin from the West Cornish Coast.

Beverages

Protein drinks as a pure, clean way of consuming protein will continue to win, countering the race to the bottom we see at the mass end of the shake category. From DIY kits to wholefood detox cleansing plans this is an opportunity for plant-based products to gain prestige in liquid form.



Spira - Kits with which you can grow your own protein, ensuring the purest, leanest products are going into a morning smoothie.

Luxury/Artisanal

Using innovative proteins that support the structure of skin, nails, and hair in cosmetic products will be an innovative jump for the luxury/artisanal category, who can build on the spreading consumer mantra of 'don't put on your skin what you wouldn't eat'.



Alpha Keratin 60ku™ is pure and complete protein, which our bodies can absorb where it is needed "strand by strand, smoothing, resurfacing and filling in cracks of damage."

Dairy

It doesn't take a great deal of investment to elevate dairy to a natural, clean and premium product, especially when the brand has an impressive heritage already. More ambitious goals for traditional companies would be towards premium milks and cheeses with higher protein content from natural sources.



Grey Barn Milk, unpasteurised raw milk. Offers a 100% untampered with product in a category that is under high scrutiny.

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4. Pick Me Up Proteins

Protein-led brands and products continue to dominate and grow the snacking category

What's the story?

In line with consumer trends towards more fluid schedules and mealtimes, snacking has seen a surge – but with it has come significant health consequences for the global population. The opportunity for protein-led snacking offers which promise a healthier and longer-lasting fill on the go is huge.



Globally, we will be spending $3.2bn more on meat snacks in 2021, from spending $6.27 billion in 2016.

Technavio, 2017 [1]

"Consumers are now looking for protein everything. From a biscuit to slice of bread to an ice cream. There is an opportunity to offer a good for you snack, to satisfy a hunger pang without making you feel guilty"

Niall Moloney, founder of PowCow

Yesterday

Snacking formats were limited, and traditional forms of protein came in meal-ready portions.

Today

Snacking options have proliferated, but the category is reliant on sugars and fats to offer portable pick-me-ups. Innovative protein offers are beginning to stretch and grow the category.

Tomorrow

More conscious snacking between even more fluid mealtimes will see consumers scrutinising the efficiency, taste and health credentials of each snack they consume.

1. Global meat Snacks market 2017-2021, Technavio 2017

How is this opportunity manifesting around the world?

We identified three expressions of Pick Me Up Proteins:

Wider Availability

Omnipresent protein becomes a reality as savvy manufacturers reach consumers via new distribution models

Crafted Indulgence

Suggesting pairings and complementary flavours puts protein snacks at the heart of social occasions and more meaningful experiences

The Anti-Sweet Movement

Innovative savoury protein snacks can trump both salty treats and sugary protein sources, such as bars and shakes, when it comes to health and fullness

Wider Availability

Omnipresent protein becomes a reality as savvy manufacturers reach consumers via new distribution models.

as simple as...

...as stretchy as



What:

Protein-rich Graze snack boxes are now in mainstream stores like Tesco and Boots, confidently positioned as a healthier alternative to confectionery and crisps.

Why:

Graze have gone against the typical flow, shifting from an online-only subscription offer into physical retail to satisfy the impulsive, yet health-conscious snacker.



What:

Healthy Nibbles are as the name would suggest distributors of healthy, vegan friendly snacks. They have capitalised on diverse channels including vending machines, office and home subscriptions, travel services and events.

Why:

The brand's aim is to be as ubiquitous as possible, making satiating protein offers top of mind for consumers in all locations, challenging the convenience status quo.



What:

High protein coffee from Starbucks is a seemingly simple, yet breakthrough innovation for protein to piggyback one of the most widely available products around.

Why:

By answering to the high demand for protein which maintains energy levels in the long-term, and coffee which combats tiredness in the short term, Starbucks have unlocked a new source of growth.

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Crafted Indulgence

Suggesting pairings and complementary flavours puts protein snacks at the heart of social occasions and more meaningful experiences.

as simple as...

...as stretchy as



What:

CACOA+ is a regular chocolate formula but with a high protein content. Brand communications promise to combine “power and pleasure, fitness and flair and health and honesty.”

Why:

The product doesn’t focus on macro-counting or even on being exceptionally healthy, but candidly sells itself as an indulgent chocolate bar with an added functional benefit.



What:

PowCow Yoghurt is deliciously ‘guilt free’, high protein frozen yoghurt.

Why:

PowCow have not shielded away from creaminess or indulgence in their Greek-style frozen yoghurt blend. Definitively positioned as a dessert, it is as protein-rich as a regular shake and by far a healthier option than ice cream.



What:

Made for Drinks is a brand starting a ‘new protein movement’ pairing premium, protein-rich bar snacks with craft drinks.

Why:

Traditional pub or bar snack options are being preimumised, but Made for Drinks noticed that Protein isn’t part of that premium snacking offer. By offering tasting notes and pairing suggestions with their artisanal meat-based snacks, Made for Drinks reaches a new, more discerning target consumer.

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Anti Sweet Movement

Innovative savoury protein snacks can trump both salty treats and sugary protein sources, such as bars and shakes, when it comes to health and fullness.

as simple as...

...as stretchy as



What:

Epigamia Snack Packs play on the novelty of high-protein, savoury yoghurt and snack combinations.

Why:

Specifically positioned as a healthy option for '5pm hunger pangs', the range features both sweet and savoury options, such as Jalapeño Greek Yoghurt with Barley Puffs.



What:

Snack Mates are high protein snacks with zero sugar developed with children's lunch boxes in mind.

Why:

With parents increasingly conscious of the sugar content of kids lunch options, Snack Mates promises energy and taste without compromise.



What:

Primal strips have innovated new flavours for their vegan jerky.

Why:

Savoury, high-protein snacks are traditionally associated with meat options but with growing numbers of vegetarian, vegan, green and ethically minded consumers, Primal Strips soy and seitan jerky have become increasingly popular. Bold global flavours and 'primal' branding support their unapologetic standpoint.



What:

Blue Hill all natural yoghurt is made with grass fed cows' milk and vegetable extracts.

Why:

Vegetable versions of fruit flavours products steer clear of the high sugar levels and unlock new routes for growth in a once-saturated category.

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Pathway 4: Pick Me Up Protein

How might our focus categories capitalise on this opportunity?

Meat

Meat can step in to meet the need for a between-meal pick me up rather than a sugary treat.

From jerky to bars and balls, there is significant potential for on-the-go meat consumption.



Protein and Paleo inspired Fori bars are a meat-based savoury alternative to over processed and sweet tasting snack bars.

Seafood

Snack-sized seafood is entering consumers' consideration as they seek novel savoury options. Innovating products and channels that preserve fish or keep it fresh for snacking could unlock value in our markets.



Fish Jerky is higher in protein and unsaturated fat than a standard beef jerky.

Beverages

Awareness of the importance of hydration has never been higher.[1] Innovative players are making the most of this easy category win, offering protein enhanced products that can be easily consumed as juice or water, to be consumed easily in or out of home.



Up & Go is widely available across supermarkets. A natural next step in this brand's strategy is getting into new convenience channels.

Luxury/Artisanal

Food on-the-go and delivery services still warrant a higher mark-up. Creating tailored services for snacks which deliver to the door, to the office or to your event will be a key way to offer premium snacks rich in protein.



Vegan cuts is a subscription box containing a highly curated selection of sweet and savoury premium vegan snacks.

Dairy

Dairy has the opportunity to capitalise on new routes to consumers, by enabling freshness on the go, such as protein pots, in fast casual outlets and direct-to-consumer chilled delivery.



Quaker Oats now offer squeezable on-the go porridge packs. Higher protein content via adding whey powder could increase the appeal and value of this offering.

Images used are for illustrational purposes only and are not of a specific product or company, or in any way representational unless otherwise stated | 1. The Future of World Religions, Pew Research Centre, 2015

5. Fit For Me

Critical to healthy living, new forms of protein are meeting a variety of emerging personal dietary considerations

What's the story?

With increasing disposable income comes the ability for consumers to be highly selective, choosing proteins on the basis of highly personal, functional needs, from addressing health conditions and intolerances to religious or spiritual sensibilities.



We may be living longer, but older individuals are not necessarily living healthier, more active lives.

World Health Organization, 2015[1]

China is the world's second largest market in the weight management category and is expected to dominate global growth over 2015-2020. Sales are expected to increase by 123% over 2015-2020 to US$1.8 billion.

Euromonitor International, 2017[2]

Yesterday

Traditional proteins offered no scope for personalisation, and limited information or guidance as to their nutritional benefits for health.

Today

Rising awareness around the properties of protein mean greater numbers of consumers turning to it for weight loss and slimming, and reaching for complete proteins to replace meats.[3]

Tomorrow

Consumers will seek more information and guidance for personalising their protein intake according to age, lifestyle, and even their genes.

1. "World Report on Ageing and Health", WHO, 2015 | 2. "Weight management and Wellbeing in China", Country Report Euromonitor International, 2017 | 3. "We are What We Eat, Healthy eating trends around the world", Nielsen, 2015

How is this opportunity manifesting around the world?

We identified three expressions of Fit For Me:

Age Appeal

There is a significant education gap when it comes to the greater protein needs of the older generation and across different life stages. Leading-edge players are effectively appealing to previously side-lined cohorts

The Growth of Niches

Protein choices are driven less and less by necessity, and more and more on the basis of milder intolerances or new brands of diet and lifestyle

Fill Up, Slim Down

A key driver for protein purchases, and inextricably linked to the anti-sugar movement, is the desire to stay ‘fuller for longer’ and lose weight as a result

Age Appeal

There is a significant education gap when it comes to the greater protein needs of the older generation and across different life stages. Leading-edge players are effectively appealing to previously side-lined cohorts.

as simple as... ...as stretchy as



What:

Chobani Protein Yoghurts have revamped their branding to appeal to the ‘nostalgic era of dairy’.

Why:

Baby Boomers, a key demographic in the US hold 70% of disposable income.[1] They demand functional foods, with ingredients that will help them prevent aging conditions, and Chobani has identified a way to resolve a true need in the US market, as well as playing to their emotions and memories of the look and feel of traditional dairy products.



What:

Hi-Lo bread introduces high protein into a versatile product present in most people’s daily lives.

Why:

Hi-Lo uses families and older couples in communications and steers clear of high performance gym goers, promoting protein as part of a complete and balanced lifestyle. The branding also calls out other benefits such as high in fibre, a popular requirement from older consumers.



What:

Forward-thinking supplement brands like Nootropics are experimenting with a natural compound from black hoof mushroom extract (Davallialactone).

Why:

This ancient medicinal remedy thought to prevent the energy dips that come with age, has now been proven to prevent Protein glycation (i.e. sugar bonding with protein molecules which prevents the body using it for repair) and therefore can help to target older consumers, and particularly diabetes sufferers.

Images used are for illustrational purposes only and are not of a specific product or company, or in any way representational unless otherwise stated | 1. Introducing Boomers: Marketing’s most valuable generation, Nielsen 2016

The Growth of Niches

Protein choices are driven less and less by necessity, and more and more on the basis of milder intolerances or new brands of diet and lifestyle.

as simple as... ...as stretchy as



What:

Hemp Protein from Nua Naturals is ground into a rich, nutty, fine powder. It can be blended into smoothies and juices or sprinkled on cereals, granola, yoghurt, salads.

Why:

A niche raw material such as Hemp is gaining users through the perfect combination of convenient new formats, new health and nutrition information, the rise of veganism and internet distribution.



What:

'Soylent' promises to be a complete meal replacement containing all the necessary nutrients with proteins as one of the major ingredients of the 'Soylent' range.

Why:

There is a clear shift towards brands offering full meal packages or detox regimes via protein rich drinks – from Huel, to drink detoxes, drinking all our nutrients is one way that hardcore macronutrient counters can ensure they know exactly what's gone into their bodies.



What:

Terravia is harnessing algae to create vegan sources of nutrition for our growing population, and for the increasing numbers of consumers who are allergic/intolerant to soy.

Why:

Algae can substitute a variety of staple formats - its flour can replace dairy fat, egg yolks and soy, while also acting like a traditional protein powder, providing fortification and enhanced nutrition.

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Fill Up, Slim Down

A key driver for protein purchases, and inextricably linked to the anti-sugar movement, is the desire to stay ‘fuller for longer’ and lose weight as a result.

as simple as...

...as stretchy as



What:

OOMF! Have added additional protein to their quick and easy instant porridge pots, positioning them as a “healthy kick-start to your day.”

Why:

OOMF! provides a slow-release energy breakfast, with the added fullness factor. Being low in sugar and fat they say their ‘calories come from the right places’.



What:

Quinoa Rava Upma Insta Mix is part of a recent range of highly successful quinoa-based products released by Orillet Foods in India.

Why:

Rich in protein and fibre, with a low GI, quinoa is the perfect aid to healthier living in India, which has suitably dry soil to grow the crop in abundance.



What:

Splendid Spoon offers protein-packed plant-based, sugar-free cleanses and meal replacements to help people achieve their health goals assisted digitally by a registered dietitian, a specialist on energy homeostasis, and a professional chef.



What:

The Balance Box uses your activity log and health stats to suggest what you should eat to meet your nutritional needs via an app. The consumer can then pick four coloured ‘quads’ to make up a balanced meal that fits into a portable pack (within this “protein” has its own section).

Why:

Players like Splendid Spoon and The Balance Box are helping the mass market make super-informed choices when composing a meal, knowing the exact nutritional composition and quantities for optimal fullness on the go.

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Pathway 5: Fit For Me

How might our focus categories capitalise on this opportunity?

Meat

Protein's lean muscle maintenance and toning benefits have somewhat evolved to more accessible marketing around general health. Using lean meats to help us fill up, instead of bulk up will be an important need to address for a bigger segment of the population. It is also worth noting the growing Muslim population in many key markets, whose needs surrounding meat as a source of protein are specific and unwavering. [1]



We see a huge increase in people ordering fresh meal prep plans, where fresh meats are always a key star of the meals.

Seafood

Fortifying everyday foods with algae and/or fish protein is an easy win for this category, and an easy change to make for older consumers or families with entrenched food habits.



Thrive: cooking Oil made from Algae is higher protein than conventional oils but still perfect for cooking fish dishes, therefore an easy replacement to make in the kitchen.

Beverages

Making everyday beverages seem more functional for consumers and emphasising that they play a critical role in weight management along with mealtime and snack choices is a big win for the category. Whether this is through nutritionist/scientific endorsement, or suggested nutritional pairings with foods.



Laboratory finish to the product adds prestige to the Ripple Drinks brand.

Luxury/Artisanal

There is a significant opportunity in adding luxury value to purely functional protein propositions i.e. organic, kosher, GMO-free or halal products whose packaging cues delicious taste and quality as well as the functional promise on their label.



"Food as Therapy" makes direct connections between how we feel/our mental health and what we eat, and recommends recipes accordingly.

Dairy

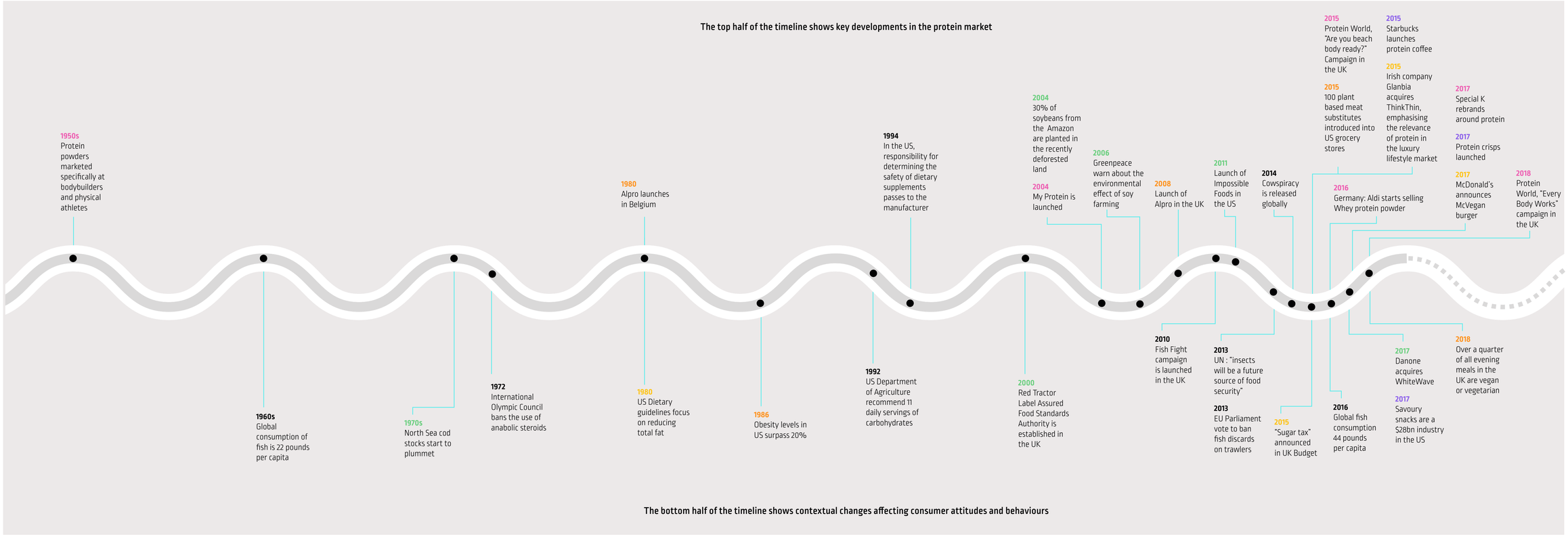
Dairy is one of the most reassuringly recognisable formats through which to introduce higher levels of protein into older consumers' diets. From fortified desserts and yoghurts, to more functional cheeses and egg white innovations, day-to-day products can be made into health solutions for those deficient in protein.



Arla Foods have isolated Casein, allowing PKU (Phenylketonuria) patients to enjoy better tasting supplements that are more soluble within desserts and other dairy products.

Images used are for illustrational purposes only and are not of a specific product or company, or in any way representational unless otherwise stated | 1. The Future of World Religions, Pew Research Centre, 2015

Protein: A Timeline


The top half of the timeline shows key developments in the protein market
1950s
Protein powders marketed specifically at bodybuilders and physical athletes
1960s
Global consumption of fish is 22 pounds per capita
1970s
North Sea cod stocks start to plummet
1972
International Olympic Council bans the use of anabolic steroids
1980
Alpro launches in Belgium
1980
US Dietary guidelines focus on reducing total fat
1986
Obesity levels in US surpass 20%
1992
US Department of Agriculture recommend 11 daily servings of carbohydrates
1994
In the US, responsibility for determining the safety of dietary supplements passes to the manufacturer
2000
Red Tractor Label Assured Food Standards Authority is established in the UK
2004
30% of soybeans from the Amazon are planted in the recently deforested land
2004
My Protein is launched
2006
Greenpeace warn about the environmental effect of soy farming
2008
Launch of Alpro in the UK
2010
Fish Fight campaign is launched in the UK
2011
Launch of Impossible Foods in the US
2013
UN : "insects will be a future source of food security"
2013
EU Parliament vote to ban fish discards on trawlers
2014
Cowspiracy is released globally
2015
"Sugar tax" announced in UK Budget
2015
Protein World, "Are you beach body ready?" Campaign in the UK
2015
100 plant based meat substitutes introduced into US grocery stores
2015
Starbucks launches protein coffee
2015
Irish company Glanbia acquires ThinkThin, emphasising the relevance of protein in the luxury lifestyle market
2016
Germany: Aldi starts selling Whey protein powder
2016
Global fish consumption 44 pounds per capita
2017
Special K rebrands around protein
2017
Protein crisps launched
2017
McDonald's announces McVegan burger
2017
Danone acquires WhiteWave
2017
Savoury snacks are a $28bn industry in the US
2018
Protein World, "Every Body Works" campaign in the UK
2018
Over a quarter of all evening meals in the UK are vegan or vegetarian
...Where next? Have we reached peak protein?
The bottom half of the timeline shows contextual changes affecting consumer attitudes and behaviours

Appendix
Non-meat protein sources will hold a varying importance across key markets

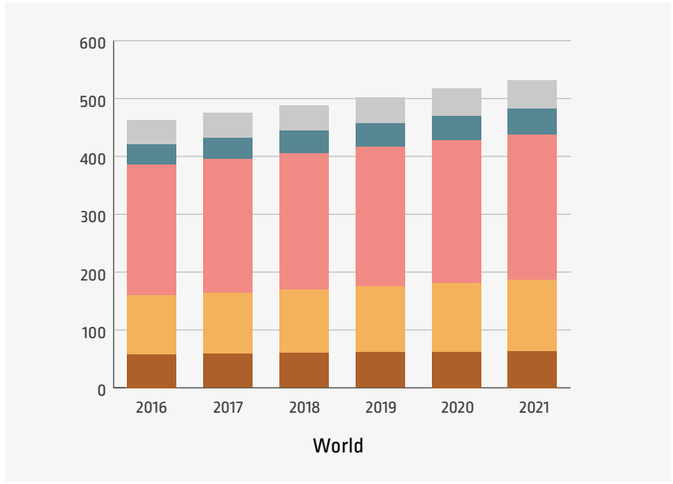
At a global scale, pulses and meat are expected to see the highest growth rates over the next 4 years

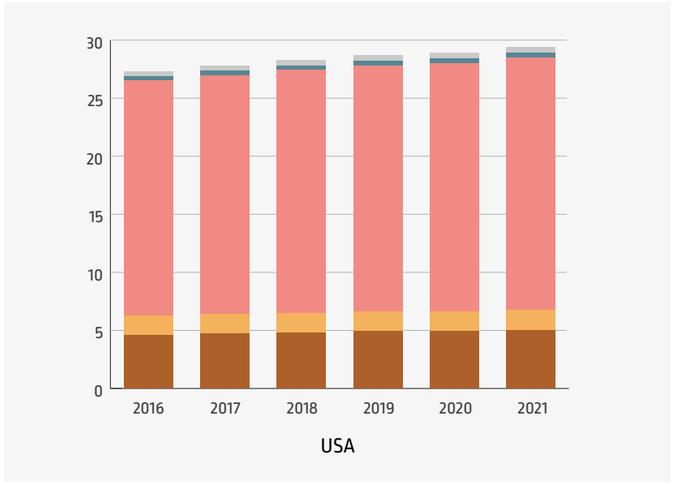
Note: axis scale differs by graph

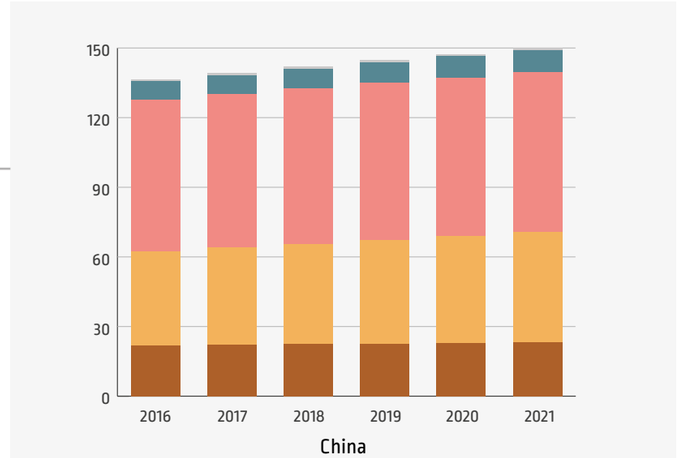
Call out in China: market with the highest share of protein sourced from nuts

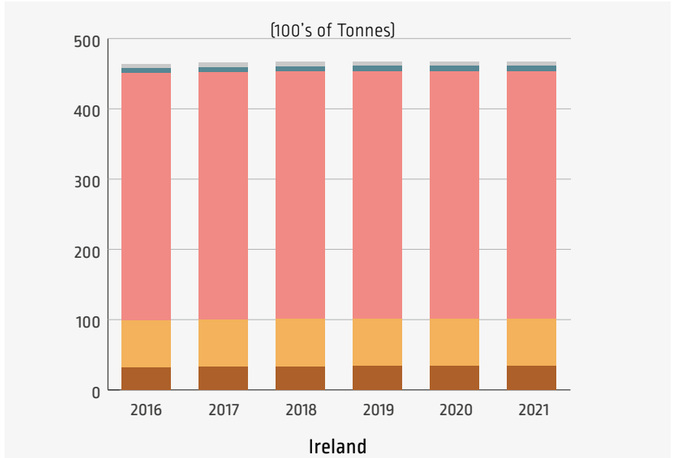
Proportionally, eggs contribute the highest share in the UK market

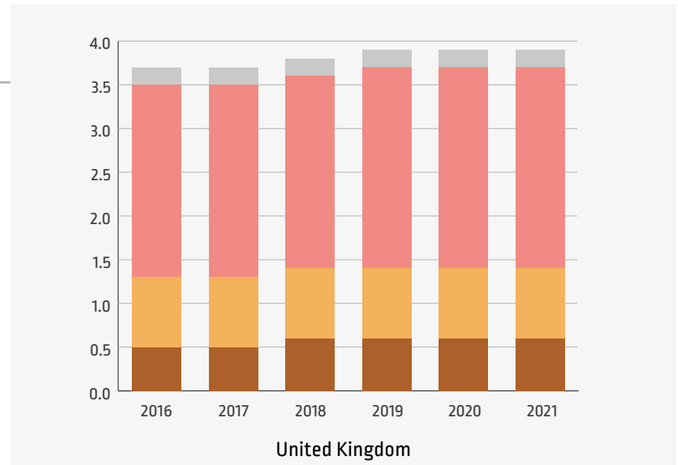
Volume of protein sold by type (Millions of Tonnes)
Source: Euromonitor international, 2017 [1]

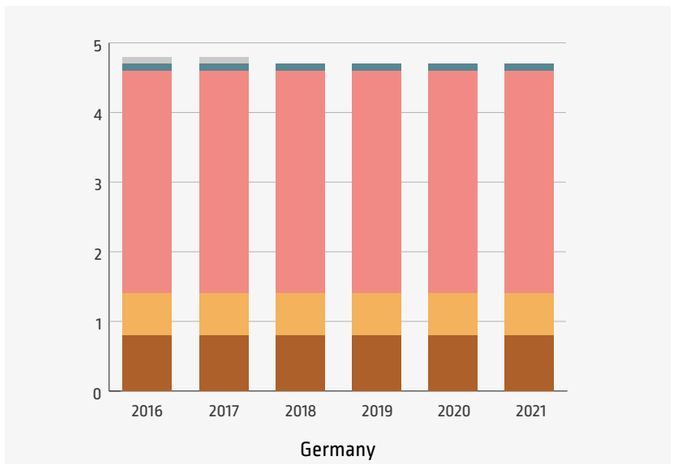














1. Economies and Consumers annual data, Euromonitor International, 2017