



Staying Ahead of the Curve: Whey Protein

By Dr. A. Elizabeth Sloan

Consumer interest in protein is on fire! According to the “2010 Gallup Study of Nutrient Knowledge and Consumption,” four in 10 consumers are making a strong effort to consume more protein; 55% of those trying to lose weight.

Two-thirds (65%) of adults believe protein helps build muscle, 39% to feel full and 34% to lose weight; 39% also think its beneficial for aging, reports IFIC’s “2011 Food & Health Survey.” One-third of adults bought a food/beverage specifically for its protein content, per Packaged Facts 2009 “Functional Foods” report.

Perhaps most exciting is that whey protein, well-known to sports nutrition enthusiasts, is now perfectly timed to be a highly marketable ingredient in the mass market—appealing to most mainstream consumers as a new and trendy protein source.

Market Potential

According to Sloan Trends’ TrendSense model, whey protein is projected to reach mass market status—Commercialization—in 2011. Medical Counts have shown strong and steady growth during the past

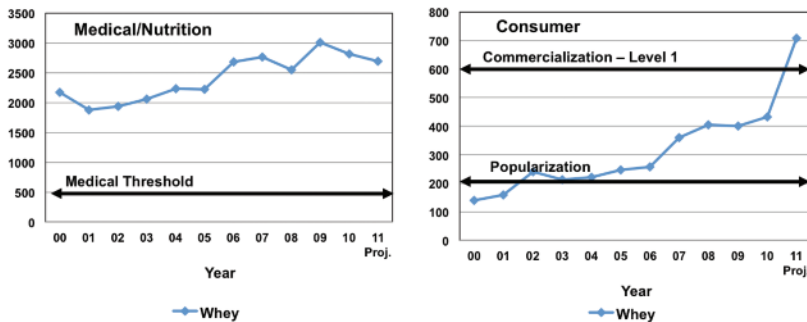
decade—increasing almost 50%—reflecting a large and growing body of scientific support.

Although a flattening of Medical Counts may cause whey protein to flirt with crossing over into Commercialization over the next few months—or temporarily remain a very high level Popularization market—it still represents a grossly overlooked opportunity in the specialty and health food channels and among very health conscious and condition-specific consumers, beyond its sports nutrition connection.

Growth Opportunities

- 39% of consumers were aware of whey protein in 2010 (“Gallup Study of Nutrient Knowledge and Consumption”). When aided with a definition, > 50% have extremely/very favorable opinions (2011 “Whey Protein Tracker, GfK Custom Research N. America,” 2011).
- Protein recommendations are 10% to 35% of daily calorie intake (50 to 175 grams on a 2000-calorie diet); on average, women get only about 14% of their daily calories from protein.
- In the U.S, 53% of consumers are extremely/very concerned about muscle health/muscle tone; 33% in Canada (HealthFocus, 2010). 1 in 2 adults say the most believable benefits for whey protein are helps build/maintain muscle and increases lean muscle mass (GfK, 2011).
- Emerging research suggests consuming a more moderate amount of protein—e.g., 30 grams at each meal or throughout the day—optimizes protein’s role in muscle building and weight management vs. the current protein distribution of 10 grams at breakfast, giving high protein breakfast foods potential “superstar” status.
- One-third (31%) of moms are making a strong effort to get more protein into their child’s diet (“2010 Gallup Study of Children’s Eating Behaviors”).
- Two-thirds of consumers say it is extremely/very im-

TrendSense™ Predictive Model: Whey



* Although there are many factors that go into determining consumer trends, measuring how medical/nutrition activity levels have risen over the past decade, as well as some of the key milestones that have occurred and how these issues have been understood and embraced by the public are essential in predicting the sustainability of the Consumer trend line.

portant for a food/drink to make them feel full to reduce cravings for snacks, help them eat less and make them feel satisfied and content. More than half of adults think foods enriched with protein can increase satiety; most appealing to age 18-34 (Dairy Marketing Institute, 2011).

- Among active young women, ages 18 to 29, who exercise at least twice a week at a gym, body toning and long-term health were more appealing than athletics and fitness, increased metabolism or increased strength as protein messages (DMI, 2011).

- Staying physically strong/healthy is consumer's biggest priority as they age (CNN Survey, 2009). Older adults are the most likely to believe the potential benefits of whey protein (GfK, 2011); It is recommended that older persons ingest between 1-1.5 grams of protein/kg/day (Morley, J. et al. "Nutritional Recommendations for Prevention of Sarcopenia." *J Am Diabetes Assoc.* July 2010).

Functional Foods & Beverages

Pasta, cereal, bread, soup, oatmeal and frozen entrées are the top foods more than half of adults would be interested in having protein fortified (DMI, 2010). However, adding ingredients that are a "natural fit" to the application is a key fortification strategy—good protein match-ups include nutrition bars, preferred for protein fortification by 48%, meal replacements 46%, milk mixes 41%, salad dressings 37%, smoothies 34% and puddings 31%.

Breakfast foods is projected to be one of the fastest growing food categories during the next eight years, according to the NPD Group, which is why fortifying traditional breakfast foods—typically low in protein—is a very big idea.

Despite the well-established positive role of protein in kid's growth/development, only 22 new high protein food/drink lines for kids were launched in 2010 (Innova Market Insights). The kids' better-for-you food/drink market reached \$4 billion in 2011 per Packaged Facts "2011 Kids Foods & Beverage Market in the U.S."

Snacks touting high protein are up 7.6%; low sodium attributes demonstrated particularly strong growth in 2010 (SymphonyIRI, "SnaxPo," 2011).

Dietary Supplements

With sports nutrition the fastest growing U.S. supplement sector in 2010, generating sales of more than \$3 billion (up 9%), the crossover of body toning to the mainstream market is destined to be very lucrative.

Sports nutrition protein powders/formulas have long been the major driver in the sports supplement category with sales projected to reach more than \$4 billion by 2017, according to *Nutrition Business Journal*.

With one-third of the U.S. population age 55 or older, and the number of Americans in the 55-64 year old age bracket projected to increase another 39% by 2018, and those aged 65 to 74 by 44%, targeting the protein-related needs of Americans aged 50+ is a big opportunity. One of the most feared conditions of aging is loss of muscle strength.

References furnished upon request.

About the author: *Dr. A. Elizabeth Sloan is president of Sloan Trends, Inc., Escondido, CA, which is a consulting firm that offers trend-tracking and predictions, strategic counsel and business-building ideas for food, supplement and pharmaceutical marketers. Each month she will provide analysis and discuss opportunities of a particular market being covered in a given issue.*

SLOAN TRENDS' TRENDSENSE is a 15-year-old trend tracking system, which identifies and quantifies trends as well as predicts the optimal timing, sustainability and life-cycle stage of ingredients, terms, product opportunities and related market issues.

The model displays medical and consumer "activity levels" based on a comprehensive analysis of five critical sources of information—consumer, trade and competitive, legal and regulatory and media coverage. The resulting charts give insight into the market's changing health issues and concerns, the ingredients that are up-and-coming and those that have just about run their course, as well as what health claims, marketing messages and products will bring your company the most success.

- **Emerging Phase** = Trends begin to appear on the radar screen. Companies should begin to collect literature and market details for those that exhibit continual growth and that might be of interest.

- **Popularization Phase** = Medical/Nutrition crossover to consumer media and marketplace; opportunity for niche or specialty markets. Marketers/manufacturers should begin a detailed evaluation of the supporting marketing and scientific data and determine if this term/trend offers a good strategic fit and is appropriate to pursue. Appropriate product development procedures should be undertaken.

- **Commercialization Phase** = Mass-market ready. Mainstream consumers have a significant degree of familiarity with the term/trend and there is opportunity for competitive advantage by getting out ahead of the competition or by providing a unique and highly innovative product positioning for success.