TRENDING FLAVORS AND INGREDIENTS IN PROTEIN – US – 2023

Nearly half of consumers currently purchase value added proteins, primarily to save time, demonstrating the power of convenience enhanced by exciting tastes.

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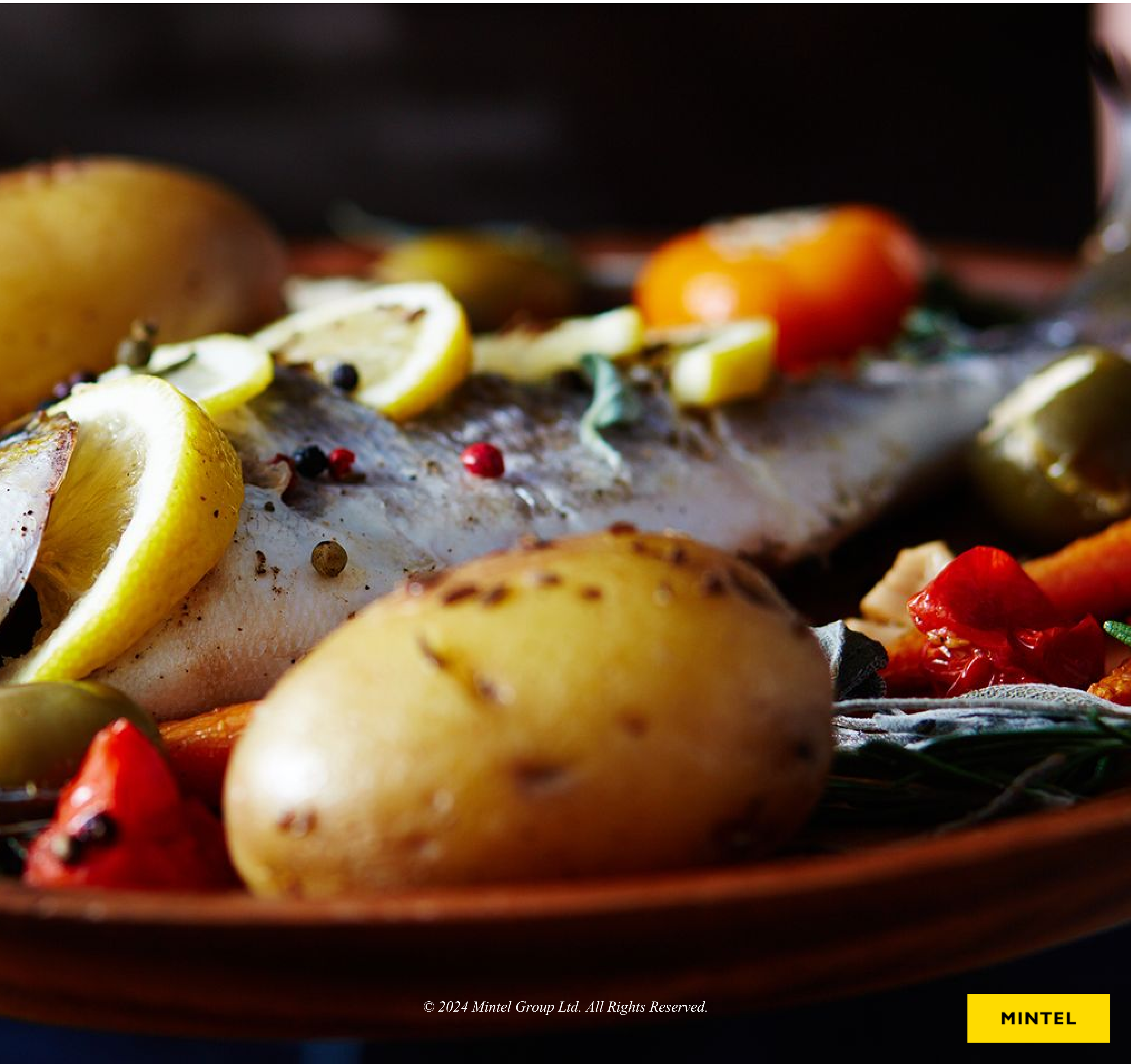

Trending Flavors And Ingredients In Protein - US - 2023

This report looks at the following areas:

- Proteins species purchased
- Frequency of value-added protein purchase
- Reasons for buying value-added protein's
- Attitudes and behaviors related to value-added proteins
- Motivations to increase value-added protein purchase
- Experience and interest in flavors and preparations with proteins
- Trends in protein product development
- What's next in product development for value added meats/meat alternatives

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Overview

Nearly half of consumers currently purchase value added meat/meat alternatives, predictably, to save time, reflecting the power and value of convenience coupled with on-going interest in taste exploration. Still, consumers are split on flavored meats; between interest in DIY prep tips, and those who want more diverse and exciting options from brands and retailers – demonstrating that there is room, if not a need, for both. While price remains a primary barrier to purchase, brands and retailers can remind consumers of the sweet spot that value meats are: not as pricey as dining out, with all the flavor and experience.

Leveraging even more versatility out of value-added meats simply adds to the value of convenience. Recipes, unique serving suggestions and pairings for meals and snacks can help at home "cooks" feel confident in the kitchen and make the most of protein purchase. (Think breakfast and lunch, too).

To further supplement cost savings and convenience of value-added meats, leaning into healthier options can also be a gateway, especially to engage underleveraged older consumers more.

Report Content

EXECUTIVE SUMMARY

CONSUMER INSIGHTS

- Reinforce the connections between flavor, convenience and variety online and in-store
- Gen Z, Millennials want more guidance and products to explore
  - Graph 10: attitudes and behaviors related to flavored meats, by generation, 2023
- Fewer than 40% of home cooks think they have advanced cooking skills
  - Graph 11: attitudes and behaviors related to flavored meats, by household size, 2023

Motivations to increase purchase of meat/meat alternatives

- Protein challenges brands to balance desire for healthier options and indulgence, flavors can help
  - Graph 12: motivations to increase purchase of meat/meat alternatives, 2023
- Prioritize "holistic" health first
- Gen Z, Millennials are changing the flavor game
  - Graph 13: motivations to increase purchase of meat/meat alternatives, by generation, 2023
- Become a part of the meal prepping and planning process
  - Graph 14: motivations to increase purchase of meat/meat alternatives, by household size, 2023
- Connect experience to value to incentivize parents
  - Graph 15: motivations to increase purchase of meat/meat alternatives, by parental status, 2023

Interest in and experience with meat/meat alternative flavors

- Classic homestyle menu offerings cast a wide net, yet with room to grow...
  - Graph 16: interest in and experience with meat/meat alternative flavors, 2023
- Not just Gen Z, Millennials want to explore with flavor
  - Graph 17: interest in trial of meat/meat alternative flavors, by generation, 2023
- Make comparisons to reinforce ingredient education
  - Graph 18: interest in and experience with meat/meat alternative flavors, 2023
- Growing Flavors in Proteins on US menus

Flavored meat attitudes and behaviors

- Get consumers out of their shell with bolder, hard to replicate flavors
  - Graph 19: attitudes and behaviors related to flavored meats, 2023
- Next gen consumers want it all: flavor adventure and BFY
  - Graph 20: attitudes and behaviors related to flavored meats, by gender, 2023
- Flavored proteins offer a middle ground for parents
  - Graph 21: attitudes and behaviors related to flavored meats, by parental status, 2023

COMPETITIVE STRATEGIES

Marketing and advertising

- Brands target nuanced yet salient groups with social partners
- Grocers use flavors and builds to channel "LTOs"

Opportunities

- Keep the natural claims coming to elevate health perceptions

Product development – now – what's trending

- BFY coated proteins provide a happy-compromise for parents...
- ...with more than "meat", less fat
- Classic, regional flavors and preparations trend with young adults too
  - Graph 22: interest in and experience with meat/meat alternative flavors, by generation, 2023
- Brands go regional to refresh homestyle classics

Product development

- Flavor landscape for meat products in USA

Product development – now – what's trending

- Internationally inspired flavors get deeper
  - Graph 23: interest and experience with flavors, NET - any interest, 2023
- Meats continue to explore global flavors and dish inspired preparations
- Bring the heat

Product development – near – what to watch for

- Take a page from restaurant menus
- Interest in chimichurri makes the leap to CPG meats
- Emerging bulgogi can benefit from education and promotion

Product development – next – what's in the pipeline

- Preparation methods are the new flavors
- Braised, slow-cooked and sous-vide, oh my
- Lemongrass is novel with potential

THE MARKET

Market context

State of the market

- The seafood category lags behind
  - Graph 24: protein purchase, 2022-23
- High-protein is becoming more of a priority
  - Graph 25: top factors when shopping for food*, 2022-23

Market drivers

- Cutting back on AFH dining means more opportunity for cooking at home

APPENDIX

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