The power of protein

2018 PROTEIN CATEGORY ANALYSIS

EDGE
BY ASCENTIAL

51% of UK adults sometimes struggle to find time to eat as healthily as they would like to

Introduction

The UK protein market has exploded.

Shoppers are increasingly looking to supplement a healthy lifestyle with high protein foods and shelves are lined with more protein products than ever before.

> 'The global protein ingredients market size was valued at USD 25.62 billion in 2016 and is expected to witness growth at a CAGR of over 7% from 2016 to 2025'
>
> GRANDVIEW RESEARCH / 2017

This growth is not just isolated to traditional protein snacks and drinks. With new product development and market entrants, brands are looking to capitalise on health conscious shoppers with busy lifestyles. On-the-go snacks have been a staple purchase for modern shoppers for years, but have often been labelled as unhealthy. In response to this stigma, coupled with a surge in protein popularity, brands are increasingly looking to cater for the demand in healthier snacking alternatives.

WHAT'S DRIVING DEMAND?

The overall demand for protein snacking is growing among consumers across the globe, especially amongst urban shoppers with busy lifestyles that do not provide much scope for enough nutritional intake via traditional food habits.

> '51% of UK adults sometimes struggle to find time to eat as healthily as they would like to.'
>
> MINTEL / 2017

With more protein products on UK shelves than ever before, it seems unlikely that this trend is slowing down. Kallo Foods (2017) found that UK consumers who eat healthier packaged foods has increased by 12% since 2016. With traditional snacking lines seeing more new entrants, product development and protein-specific shelves, the market appears destined for more growth.

RETAILER RESPONSE

While this shift in consumer buying habits is a huge opportunity for brands, it does pose a question for retailers – where should all these products sit? As the lines become increasingly blurred between healthier snacking options and outright fitness supplements, retailers have to carefully consider where these products should sit in-store and online. Many retailers are looking to replicate in-store shelf structures online, but as many products now sit as hybrids between health supplements and traditional snacks, dual-listing is becoming increasingly popular.

Culture of misinformation

'There is plenty of misinformation around what is the right amount of protein to be consumed. The common message that we should consume as much protein as possible is not necessarily correct due to how the body processes protein.'

NATHAN GRIFFITHS
Head of Marketing at The Primal Pantry

Categories, Manufacturers, Retailers + NPDs

RANGE EVOLUTION AND EXPANSION

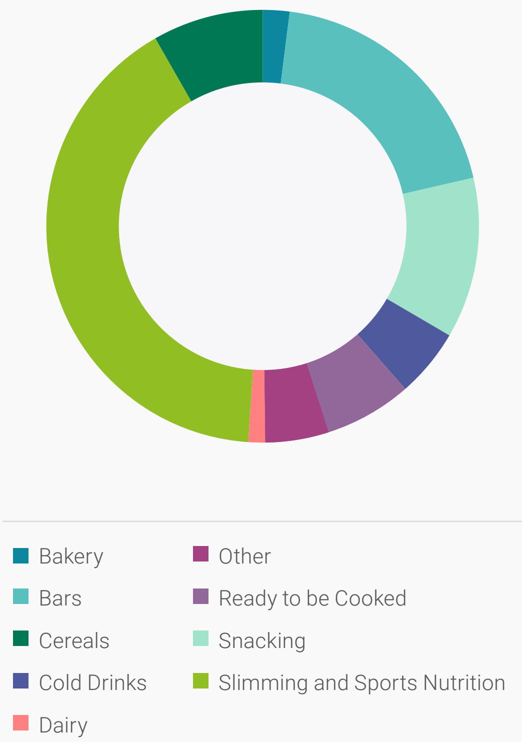
As demand for protein products soars, brands are launching new products and new entrants are penetrating the on-the-go market. In the first 5 months of 2018, we have seen Lidl launching their own protein range and all leading UK supermarkets introducing protein-specific shelves online.

As of May 2018, shoppers could choose from just under 800 lines* advertised as being rich in protein, and from almost 500 lines excluding products targeted for Slimming and Sports. Consumers have an ample selection of Bars and Balls, Cereals (both hot and ready to eat), Snacks, Dairy Products and Drinks to choose from; allowing for both snacking and breakfast to be enriched in protein.

Protein consumption does not stop here. Shoppers can also increase their protein intake through Ready Meals, Wrapped Bakery Products, Pastas and Sandwiches. Retailers are increasingly catering for quick, protein-based meals with Asda, Tesco, Morrisons and Sainsbury's all offering Own Label protein Ready Meals.

Interestingly, protein is now expanding its influence from Health and Snacking to traditionally 'unhealthy' categories, like Ice Cream. Shoppers can now enjoy high protein Ice Cream, such as the Breyers High Protein Ice Cream Bars or WheyWhey The Protein Ice Cream.

PROTEIN LISTINGS 08 MAY 2018



RETAILER WITH THE WIDEST RANGE

Across the retailers analysed, Graze was the manufacturer with the strongest presence; counting 63 listings overall. Own Label was third, just after Sci-MX Nutrition LLP. Retailers offer Own Label high-protein options particularly in the Slimming and Sports Nutrition category, as well as in Ready To Be Cooked. Of the six retailers analysed, Asda is the main player in terms of Own Label products advertised as high in protein.

CATEGORIES DRIVING GROWTH

Since the start of 2018, 177 new protein listings have appeared across the six retailers, against 82 that were delisted. Slimming and Sports Nutrition was unsurprisingly the category that counted the highest number of new listings. The Cereals category has seen a significant increase, with new listings accounting for 37.5 percent of the entire category. Bars also saw a sharp increase in listings, accounting for 18.7 percent of the entire category at the end of the period analysed.

Dairy, despite being the fifth biggest category overall, did not expand greatly up until 8 May. The category was also second only to Slimming and Sports Nutrition for number of delistings, especially due to five FUEL10K Quark listings losing shelf space in Asda and Sainsbury's. Ready To Be Cooked, instead, appears to be a completely new category, with all of its ten listings having been launched between January and May. Three new listings were launched in the Bakery category. Despite this, 2018 saw this category shrink, driven by the delisting of six lines at Asda and Morrisons.

RETAILER RANGE EXPANSION

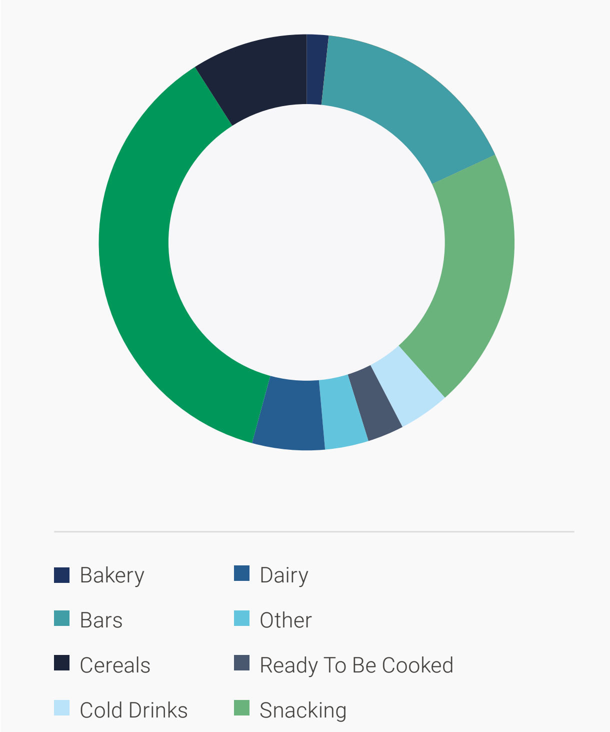
A lot of category growth appears to be stemming from new Own Label listings. In 2018, 19 new Own Label products were introduced, which corresponds to 38.8 percent of all Own Label listings available on 8 May.

Asda launched a total of ten new listings across Cereals (five), Ready To Be Cooked (four) and Slimming and Sports Nutrition (one). Morrisons introduced new listings in the Ready To Be Cooked category (six) and Fresh categories (one), whereas Tesco launched one in the Snacking category. Waitrose also launched one Ready to Go option.

Beyond the Own Label expansion, the Jordans & Ryvita Company drove growth in the Cereals category. Two new SKUs, the Jordans Country Crisp Source of Protein Nut Crunch and Berry Burst, gained shelf space in Asda, Ocado, Sainsbury's, Tesco and Waitrose.

PepsiCo also entered as a leader in the space, with ten new Quaker Oat So Simple Protein Porridge Pot listings across Asda, Ocado, Sainsbury's, Tesco and Waitrose. Kellogg's, together with Graze, drove much of the growth in the Bars category, with its Special K Protein Bars gaining nine shelf spaces across the retailers analysed.

PROTEIN LISTINGS 08 MAY 2018



94% inflation in price per unit for the protein alternative

Price disparity: Paying more for protein?

Looking at products from the Bakery, Bars, Cereals, Cold Drinks and Dairy categories, our analysis reveals the level of price disparity, if any, between the high protein and regular variant of a product.

BAKERY

In the Bakery category we looked at a pack of Warburtons Wholemeal Protein Thins (four per pack) and at Warburtons Brown Thins (six per pack). Both variants were available from Asda, Morrisons, Sainsbury's and Waitrose. The average price per thin on 16 April was £0.31 (£0.62/100g) for the protein variant, and £0.16 (£0.40/100g) for the regular option; a 94% inflation in price per unit for the protein alternative.

BARS

Comparing protein and non-protein Eat Natural, Kellogg's, The Primal Pantry and Pulsin' bars there was a similar trend with protein fetching a premium price.

For Eat Natural, a 3X45g pack of Protein Packed Bar with Peanuts and Chocolate was compared against four different regular multipacks of the same pack size and weight. Interestingly, the protein pack was never sold at a higher price than the regular ones in any of the retailers, but it was cheaper on some occasions. Waitrose was selling the high protein multipack at £1.99, whereas the Ginger, Apple and Dark Chocolate and Yoghurt Coated Coconut and Apricot Bars at £2.05 the pack. The average base price of the protein option was £0.02 cheaper than the average base price of three distinct bars available from the same retailers.

High protein Kellogg's bars, on the other hand, presented a higher price differential between variants. The Special K Protein Coconut, Cocoa and Cashew 4X28g was reviewed against the most similar regular variant in terms of overall pack weight and product format; the Special K Chocolate and Raspberry 5X22g pack. The average price across Asda, Morrisons, Ocado and Tesco was equal to £0.73 per protein bar (or £2.60/100g) and £0.40 (or £1.80/100g) for the ordinary bar.

Reviewing the premium end of the bars category, the Primal Pantry range was evaluated for pricing across their assortment. The price of their Mixed Berries Protein Bar (55g) when compared to that of four different regular variants (all 45g), all available from both Ocado and Tesco, unsurprisingly showed a greater price for the protein products. The average price of the protein bar was £2.00 (£3.63/100g), against that of the regular bar, equal to £1.50 (£3.32/100g). A review of Pulsin' Protein and Oat bars showed a similar price variance; the average price difference per 100g of product was of £0.71, a premium

Breakfast Bars

Kellogg's research (2018) revealed that the value of protein in Cereal Bars has grown by 191 percent in the last two years.

CEREALS

For cereal, comparing the prices of Weetabix On The Go Breakfast Drinks per 100ml, we found the protein cereal drinks were more expensive in all instances. The average price per 100ml of a chocolate protein drink is equal to £0.67 and that of a regular chocolate drink equal to £0.59. The same applied to the Vanilla and Strawberry options.

Breakfast Cereal

According to a 2018 study by Kellogg's, the value of protein in Breakfast Cereal has more than tripled during the last two years, with a total growth of 242 percent.

COLD DRINKS

Innocent smoothies are a further example of how protein calls for a premium price. We compared both the 360ml and 750ml versions of the Super Smoothies Berry and Tropical Protein to other Super Smoothies of equal volume. The 360ml protein version presented an average price of £0.64 per 100ml, against the £0.55 of the regular version. Similarly, the 750ml bottle of a Protein Super Smoothie was sold at an average price of £3.68 a bottle (0.49/100ml), against the £3.48 (£0.46/100ml) of other Super Smoothies.

DAIRY

In the Dairy category, the price of Arla Protein Fat Free Milk 1l was compared to Arla Best of Both Worlds Fat Free Skimmed Milk 2l; a 32 percent price difference per litre separated the two milk variants.

INGREDIENTS

No matter where you look, it appears that protein has been positioned as the more expensive option. It can be assumed that some of this price premium is driven by brands capitalising on the consumer demand. However, as Nathan Griffiths of Primal Pantry explains, a lot of these premium prices are 'driven by high quality, more expensive ingredients; hemp, nuts etc.'

Optimising 'protein' placement in retailers

COMPLIANCE ISSUES | SEARCH PLACEMENT | SHELF TAXONOMY | CATEGORY PLACEMENT

COMPLIANCE ISSUES: 'PROTEIN' MISSING FROM PRODUCT NAMES

If manufacturers and retailers are looking to market products as high protein, naturally the 'protein' message should be clear and immediate in both copy and visual content. The fastest and biggest impact comes from including the word 'protein' in the product name. This not only boosts search and category rankings, but also provides a clear value proposition. Brands should regularly monitor retailer content to ensure complete adherence to brand standards as retailers frequently adapt content to their own standards.

Our analysis identified 150 listings that have omitted 'protein' in product titles, where in other instances (retailers) the same products include protein in the title. As a result this may hinder product visibility and positioning.

Products manufactured by FUEL10k were the most affected, with 26 lines potentially being positioned inaccurately. Asda was the retailer with the lowest number of products not including 'protein' where it could have (12).

Natural Balance Foods' Trek bars also lacked the word 'protein' from a number of product titles where other retailers included it. One example is the Trek Cocoa Peanut Peak Protein Energy Chunks, for which Asda and Sainsbury's include 'protein' in their product titles, whereas Ocado, Tesco and Waitrose don't.

Although affected in much smaller measure, two Kellogg's Special K listings may have missed placement opportunities, with Morrisons having excluded the word 'protein' from both Special K protein variants.

Graze is doing well with the integration of 'protein' in product titles, except at Tesco where 'protein' is missing from five listings, and Waitrose, which did not include 'protein' in one instance.

SEARCH PLACEMENT

Using top search terms*, according to Amazon and Google Trends (May 2018), it appears it isn't that easy for shoppers to find protein-rich products. Of the 150 listings, less than half (63) placed for one of the protein-specific terms. The remaining 87 listings could not be found in any of our searches, 33 of which belonged to the Slimming and Sport Nutrition category, and 29 were Bars.

Morrisons was the retailer with the highest number of non placing listings, especially in the Slimming, Sport Nutrition and Cereal categories. These included the Jordans Country Berry Burst and Nut Crunch, Eat Natural Super Granola, Shreddies Max Granolas (both variants), as well as the Weetabix On The Go Chocolate Breakfast Drink.

TREK Bars missed the most placement opportunities, with 11 products not placing for any of the search terms analysed. Seven of these were not placing on Tesco, including the TREK Cocoa Coconut Protein Flapjack, both the multipack and single serving, and the TREK Toffee Triumph Protein Energy Chunks.

CATEGORY PLACEMENT

Of the products that do not contain 'protein' in their titles and do not place in protein-related searches, only six out of 87 sat on a protein shelf in the retailer taxonomy. This low figure may be a result of not all retailers having the relevant protein-specific shelves. In fact, there is no Slimming and Sports Nutrition or Cereals protein-specific shelf in Morrisons, nor a Protein Bars shelf at Tesco and Waitrose. Where there is no protein shelf for one given category, it is recommended that the word 'protein' is part of the product title to increase the chances that the product will place in protein searches.

In terms of the products not containing 'protein' in their title, that do return in protein-related searches, 89 percent sit on a protein shelf of the retailer shelf taxonomy. For example, a number of FUEL10K listings that sit in Protein Cereals, at Asda (three) and Ocado (nine), all return in protein-specific searches. The same applies to four Shreddies Max listings, sitting on protein shelves at Ocado and Sainsbury's.

Are products containing 'protein' always placing?

Of the 799 listings that do contain 'protein' in their title, 93.5 percent returned for at least one of the search terms investigated. Of the 52 products not placing, eight were either out of stock or unavailable on the given retailer sites. Only three out of the 52 listings sat on a protein shelf, whereas 370 (almost half) of the products returning sat on protein-specific shelves of the retailer taxonomy.

Among the products that are not placing at all were the Warburtons High Protein Bagels, Thins and Wraps on the Morrisons website – these did not even return when searching for 'protein bread'. Tesco was the retailer with the highest number of non-placing items (22). Of these, three were Graze snacks which were not placing for any terms, including 'protein snacks'.

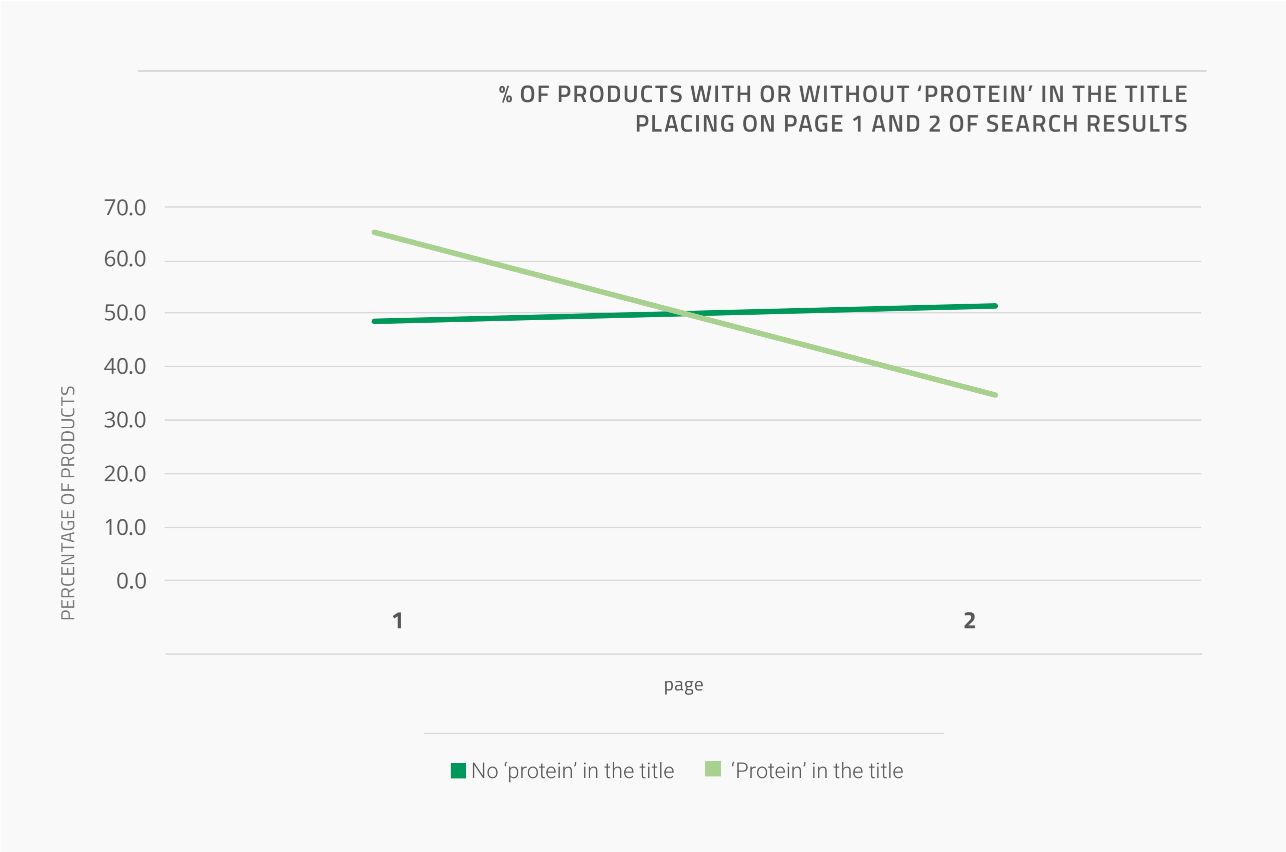
Products sitting on a protein shelf are more likely to return in search results, whether they contain 'protein' in the product name or not. Although, it is still recommended to include 'protein' in product names to maximise product discoverability.

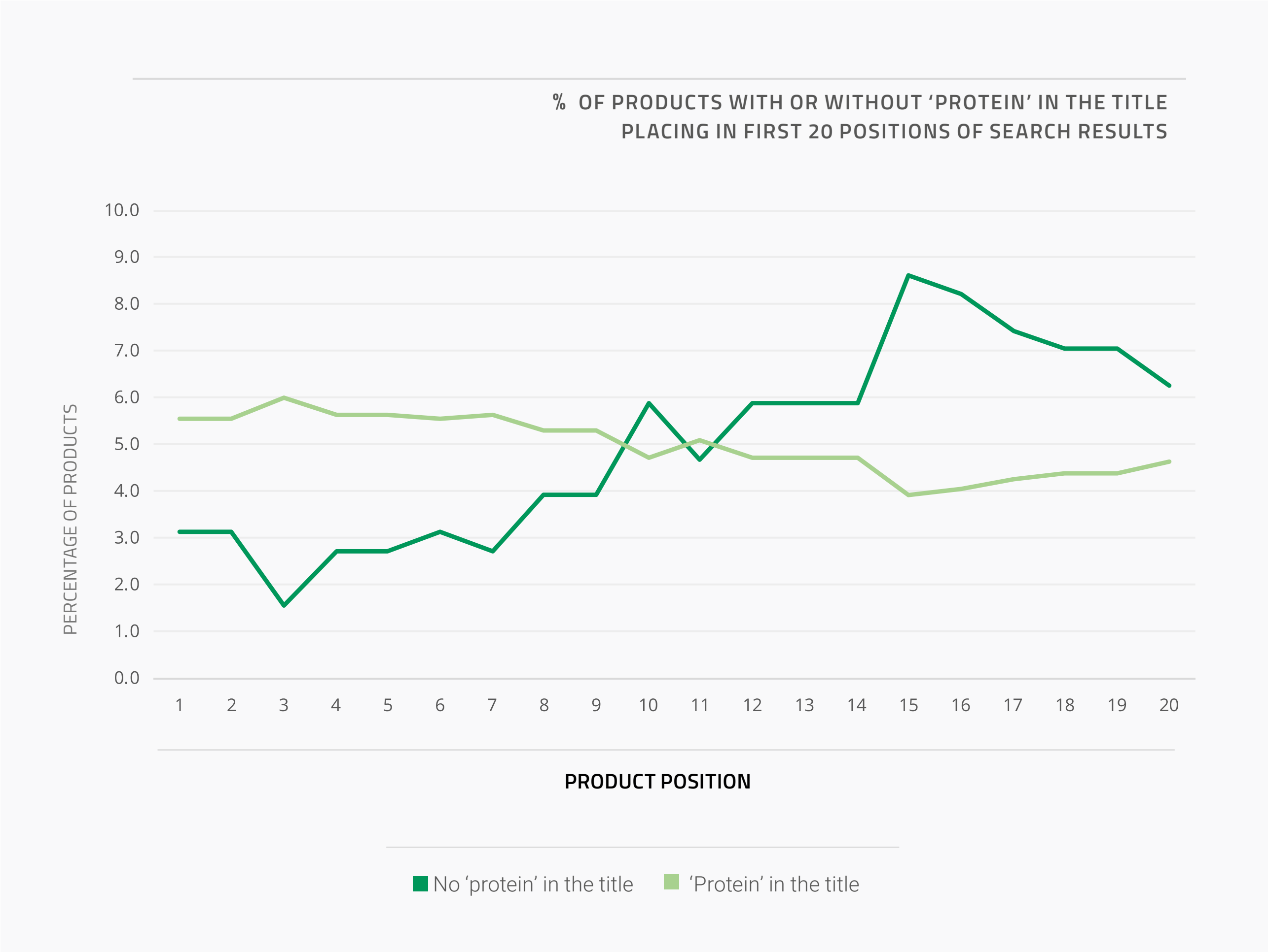
How important is it for product titles to include 'protein'?

Including the word 'protein' in the product title appears to greatly help placing in the first positions of page one search results. In fact, a greater proportion of all products containing 'protein' in their titles place within the first nine positions of page one of search results compared to those products that don't contain 'protein'. On the contrary, products that don't contain 'protein' in their titles are more likely to place from position 10 and onwards. This is especially true at Ocado, Tesco and Waitrose.

The same applies to whether products appear on page 1 or 2; the majority of products containing the word 'protein' place on page one of the results, whereas their counterparts are more likely to place on page 2.

**Protein; protein balls; protein bar; protein bars; protein bread; protein breakfast; protein cheese; protein drink; protein drinks; protein meals; protein oats; protein porridge; protein powder; protein shake; protein snacks; protein vegan; protein yoghurt; protein yogurt*


% OF PRODUCTS WITH OR WITHOUT 'PROTEIN' IN THE TITLE
PLACING ON PAGE 1 AND 2 OF SEARCH RESULTS
PERCENTAGE OF PRODUCTS
70.0
60.0
50.0
40.0
30.0
20.0
10.0
0.0
1
2
page
No 'protein' in the title
'Protein' in the title


% OF PRODUCTS WITH OR WITHOUT 'PROTEIN' IN THE TITLE
PLACING IN FIRST 20 POSITIONS OF SEARCH RESULTS
PERCENTAGE OF PRODUCTS
10.0
9.0
8.0
7.0
6.0
5.0
4.0
3.0
2.0
1.0
0.0
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20
PRODUCT POSITION
No 'protein' in the title
'Protein' in the title

Search leaders and followers: Which retailers and brands are dominating?

To understand retailers' search and position towards protein, we looked at the categories returning in the first 20 positions on page one for the generic 'protein' search term. The analysis revealed that all of the retailers returned varying results.

The search on Morrisons' website doesn't lead to a search results page but to the shop homepage, which shows a number of unrelated items. Sainsbury's is the only retailer to return Slimming and Sports Nutrition alone, missing the opportunity to target shoppers looking for ordinary products rich in protein. Slimming and Sports Nutrition is also the main presence on Ocado's results page, with 15 listings pertaining to the category. At Tesco, Dairy accounted for more than half of the first twenty slots, whereas results were more varied at Asda.

Which categories have protein specific-shelves?

Given the importance of sitting on a shelf for discoverability, our analysis reviews how many protein-specific shelves each retailer had in their taxonomy.

With nine protein shelves, three of which were brand-specific shelves for Fry's and Arla, Ocado had the highest number of protein shelves. Asda was second with seven protein shelves. Tesco and Morrisons both had six, whereas Waitrose and Sainsbury's had five and four respectively.

Protein shelves are commonplace in the Bars, Slimming and Sports Nutrition, Dairy and Cereals categories. Four of the six protein shelves at Tesco fell under the Sports Nutrition section, whereas none of the six shelves at Morrisons belonged to the Slimming and Sports Nutrition section of the retailer's taxonomy.

Location of protein-specific shelves in retailers' taxonomy

RETAILER	SLIMMING & SPORTS NUTRITION	OTHER
Asda	2	5
Morrisons	0	6
Ocado	1	8
Sainsbury's	2	2
Tesco	4	2
Waitrose	2	3

Is there a need for further protein shelves?

Through an analysis of popular categories and those items that had 'protein' in the product name, there were several gaps where retailers can potentially increase sales. Morrisons has the greatest opportunity to introduce protein-specific Bars, Cereals, and Slimming and Sports Nutrition shelves as no shelves have the relevant 'protein' references on their shelves. Sainsbury's, on the other hand, could benefit from a protein snacking shelf.

Waitrose, despite the presence of a Protein Bars sub-shelf under Sports Nutrition and Slimming, could capitalise on dual-listing by including a Protein Bar shelf under the Cereals/Snacking category. However, Waitrose is the only retailer to have a comprehensive protein shelf, which sits under the Healthy Options sub-shelf. The shelf hosts products from different categories, such as Bars, Cereals, Cold Drinks and Dairy.

Ocado, despite having a wide range of protein shelves, could boost its dual-listing opportunities by including a Cold Drinks protein shelf in its taxonomy. Similarly, Tesco could further benefit from a Bars shelf outside of the Sports Nutrition section, as well as from a Cereals protein shelf.

Products not placing on existing protein shelves

All retailers have the capability to dual-site products. Placing products on different shelves makes it easier for shoppers to find what they are searching for or can simply inspire a purchase.

Despite the presence of a relevant protein shelf, some products are simply not sitting on it. For example, Sainsbury's taxonomy includes a High Protein sub-shelf under the Breakfast Healthier Cereals section. The Weetabix On the Go Breakfast Protein Chocolate Drink 275ml, however, did not sit on this shelf, together with a number of other products, including FUEL10K and Quaker Oat So Simple listings.

On Sainsbury's, placing or not placing on the High Protein sub-shelf plays a pivotal role in the position of the products returning for the search 'protein cereals'. In fact, the shelf page is replicated in the search results, with the same products placing in the same order.

'Brands should be pushing retailers to consolidate ranges around distinct protein sub-ranges in relevant categories, and tagging relevant shelves to relevant brands. This is a quick win and ensures brands are landing on key search terms and placing on the correct category shelves.'

NATHAN GRIFFITHS
Head of Marketing at The Primal Pantry

Ocado too, with a Protein Snacks shelf under the Crisps, Snacks and Nuts section, may want to increase the variety of products it offers. We identified at least 18 savoury snacks that include the word 'protein' in their titles that could sit on the shelf. These include all Graze savoury snacks, such as the Graze Spicy Veggie Protein 32g, the Two Chicks Chirps Sour Cream & Onion High Protein Egg White Bites 28g, or The Food Doctor Full of Beans Protein Mix Mini 30g.

Tesco has a High Protein Yoghurt shelf in its taxonomy, where 13 Arla products returned in our analysis. Nevertheless, there were two Arla Protein products not placing on the shelf; Arla Protein Coconut Yogurt 400G and Arla Protein Lemon Yogurt 400G.

'The inclusion of the word '**protein**' helps achieve a higher position on page 1'

Conclusions

KEY TAKEAWAYS OF **BRAND VIEW'S** CATEGORY ANALYSIS OF THE 2018 PROTEIN MARKET

+ The Protein market has seen significant growth and will continue to grow in many facets. Growth can be measured in terms of increasing SKUs, NPDs, new entrants and overall sales. Perhaps, the most telling sign is retailer's expansion of in-store and online shelves to accommodate for this market.
+ Protein products are no longer limited to the traditional Slimming and Sports Nutrition categories. More than half of all the products that contain 'protein' in the title sit outside of this category and the on-the-go Snacking/Cereal categories are witnessing significant disruption from protein alternatives.
+ Certain categories witnessed particularly high growth in protein listings, such as Bars, Cereals, Ready To Be Cooked and Snacking. Some retailers have also increased their presence in the protein world with an array of Own Label products.
+ Protein lines fetch a premium price. In almost every instance, protein products are sold at a higher price compared to their regular counterparts.
+ Based on this analysis, there were 150 product titles across the retailers that did not include the word 'protein'. Including 'protein' is obviously vital if a brand wants its products to place in protein-related searches.
+ Sitting on a protein shelf markedly increased the odds of placing in protein-related searches, even when 'protein' was not part of the product title. Therefore, if brands think their products should not say 'protein' in their product title, they should make sure they sit on protein shelves to increase the odds of placing in protein-related searches.
+ The inclusion of the word 'protein' helps achieve a higher position on page 1, especially at Ocado, Tesco and Waitrose, making it easier for shoppers to find these products. Including 'protein' also increases the chances of sitting on page one rather than page two.
+ All retailers now have at least one protein shelf outside of the Slimming and Sports Nutrition/ Health & Beauty section of their website. There are nonetheless opportunities for retailers to expand their shelf taxonomy to include further protein-specific shelves in certain categories shoppers may want to navigate to.

Future trends

The protein boom has already disrupted traditional snacking, cereal and on-the-go ranges, in addition to having a real influence on retailers' taxonomies. We do not see the impact of protein stopping here.

Retailers

Retailers' are increasingly looking to expand their influence in the protein arena and we see this trend continuing. While brands may be paving the way in terms of new product development and market direction, retailers are never far behind in introducing their Own Label versions.

New entrants and NPDs

New entrants and NPDs will continue to increase to accommodate growing demand and we are already seeing interesting diversification. Protein Ice Cream won't be the strangest entry of the year; with lots of buzz around bug-based proteins, we are certainly going to see some unusual lines hit shelves this year.

Repositioning existing products

Repositioning is already a big trend for retailers and brands. We are seeing many products, including Own Label, simply being repositioned as a 'high in protein' product. Interestingly, these products are not being reformulated, instead brands are simply calling out their already high protein levels to appeal to this growing audience.

Growth of plant based proteins

Global plant based protein market is expected to reach USD 10,892.3 million by 2022 supported by a CAGR of 6.7% during 2017 to 2022. How quickly we will see uptake in UK retailers is debatable, but with Hemp Protein already a growing trend in the UK, it is fair to say this US trend is surely on the horizon for us too.

'The free-from and vegan segments in particular are generating great opportunities thanks to their double digit growth year-on-year. Many of the high protein products on the market contain by-products of the dairy industry, making them unsuitable for vegans and lactose intolerants. These proteins can also be hard for the body to digest, contributing to the increasing demand of alternative protein sources.'

NATHAN GRIFFITHS
Head of Marketing at The Primal Pantry

Summary analysis

Our analysis focused on the protein options available from six UK retailers; Asda, Morrisons, Ocado, Sainsbury's, Tesco and Waitrose. All analyses were based on data sourced on 8 May, while new listings and delistings were identified between 1 January and 8 May.

The study shows how 2018 has seen the number of options being advertised as a 'protein' product increasing dramatically, including categories outside of the Slimming and Sports Nutrition category. In this increasingly competitive market, the analysis revealed how it is of paramount importance to ensure 'the basics' (product representation and shelf placement) are accurate and comprehensive, as they significantly boost the chances of making a product more accessible in protein-related search results.

Appendix

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