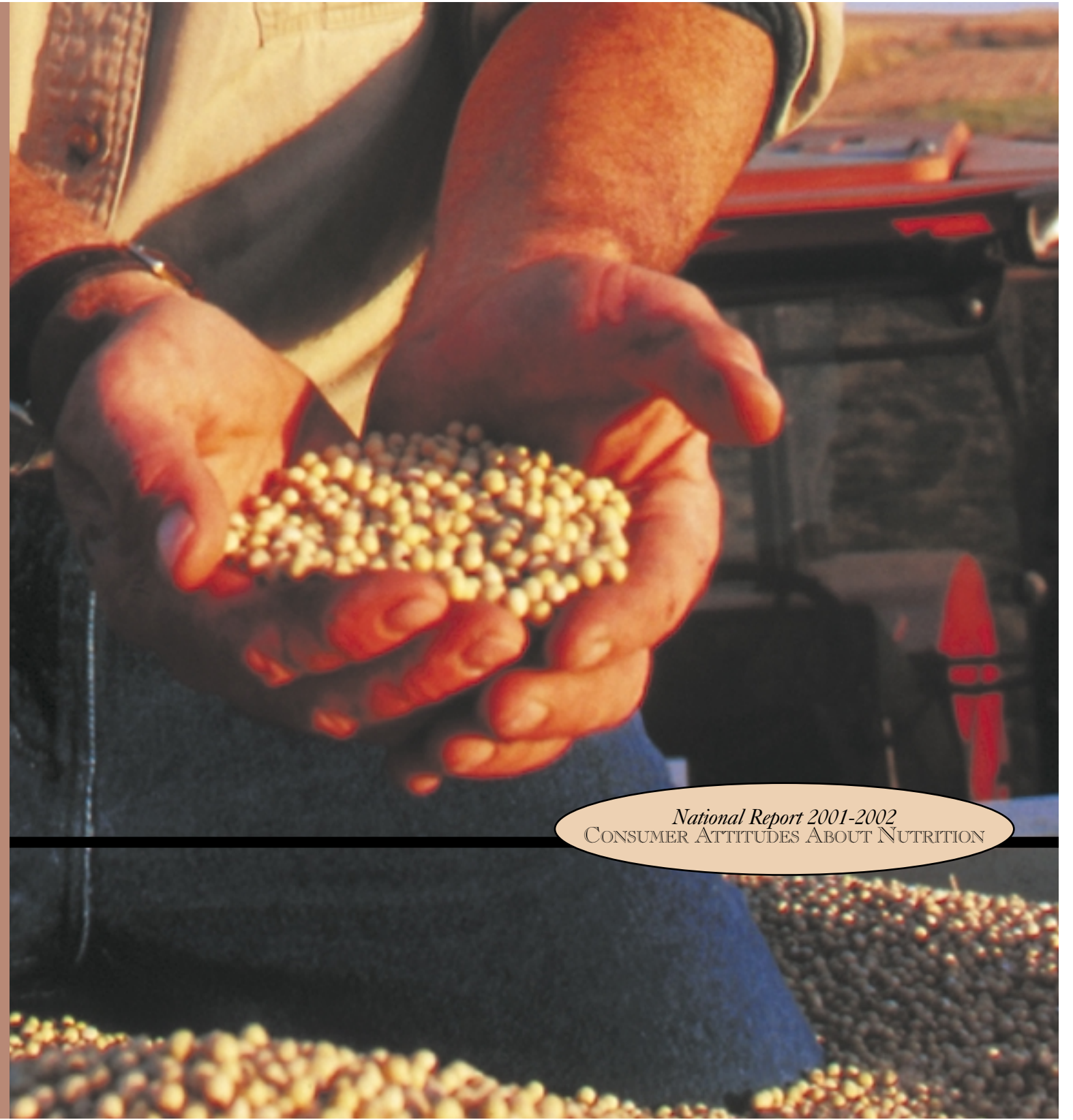




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National Report 2001-2002
CONSUMER ATTITUDES ABOUT NUTRITION



8th

This eighth annual nationwide survey examines consumer attitudes and perceptions on health and nutrition issues that may impact the food and healthcare industries. Provided by the United Soybean Board (USB) to serve as an important resource for both markets, this report covers:

- Nutrition attitudes and the effects on purchasing decisions
- Awareness and use of soy products
- Perceptions of *trans* fatty acids and hydrogenation
- Opinions on foods developed through biotechnology
- Attitudes on edible oils, including soybean oil

USB offers this survey, along with many other resources, to assist food industry and healthcare professionals in making sound business decisions related to the usage of soy. This study also provides useful information for customers and clients. Conducted by an independent research firm, the study includes 800 random telephone surveys, providing a sample that is consistent with the total American population. The study's margin of error is +/- 3.5 percent and has a confidence level of 95 percent.

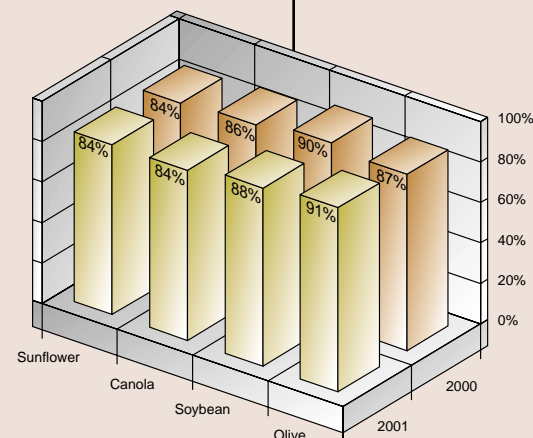
CONSUMER PERCEPTIONS OF COOKING OILS

Vegetable oil continues to be the most commonly used cooking oil in the United States, with 71 percent of consumers reporting that they use it most often.

Olive oil and Canola are also popular with 68 and 55 percent respectively reporting that they use these oils most often.

Not surprisingly, almost all consumers are aware of vegetable oil at 98 percent. Most consumers are also highly aware of Olive oil and Canola, among others.

CONSUMER PERCEPTIONS ON HEALTHY COOKING OILS



Although most Americans are frequent users of vegetable oil, 71 percent remain unaware about what type of vegetable is the main ingredient of products that carry this label. Only five percent know that the main ingredient is usually soybean oil. This is noteworthy because when named specifically, 88 percent of consumers believe that soybean oil is healthy.

Olive oil ranks highest with 91 percent, and Canola has remained high at 84 percent.

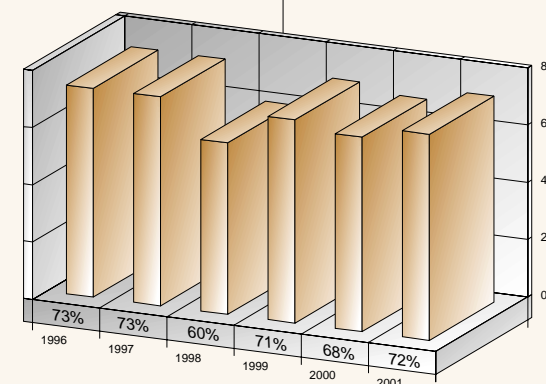
NUTRITIONAL CONCERNS AND HABITS

The percentage of Americans concerned about the nutritional content of food has remained relatively constant since 1997, ranging from 86 to 89 percent. In 2001, 88 percent are concerned about the nutritional content of their food.

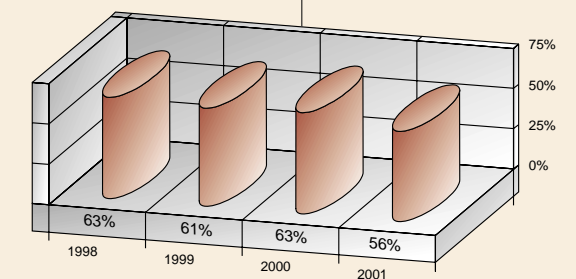
The number of consumers who have changed eating habits due to health and nutrition concerns rose to 72 percent, the highest percentage in the last four years.

Nine in ten consumers consider nutrition to be an important factor when choosing groceries, and just over seven in ten are willing to pay more for a healthier version of foods they buy.

AMERICANS CHANGING EATING HABITS DUE TO NUTRITION



AGREE THAT INFORMATION ABOUT HEALTH AND NUTRITION IS TOO CONFUSING



CONSUMER AWARENESS OF NUTRITION TERMS AND INFORMATION

Nine in ten consumers find that health and nutrition information is a big help when trying to find healthy foods and agree that the "Nutrition Facts" label is important in deciding which food products to buy.

As in past years, consumers selectively read the "Nutrition Facts" label for certain items, including total fat (19 percent), calories (12 percent), saturated fat (12 percent), sugar (10 percent) and sodium (8 percent).

Consumers who pay attention to one item on the "Nutrition Facts" label do so because of general health concerns (28 percent), followed by concern regarding weight loss (25 percent), cholesterol (15 percent), diabetes (11 percent), heart disease (10 percent) and high blood pressure (8 percent).

The number of consumers who find health and nutrition information confusing dropped from 63 percent in 2000 to 56 percent in 2001, the lowest number in four years.



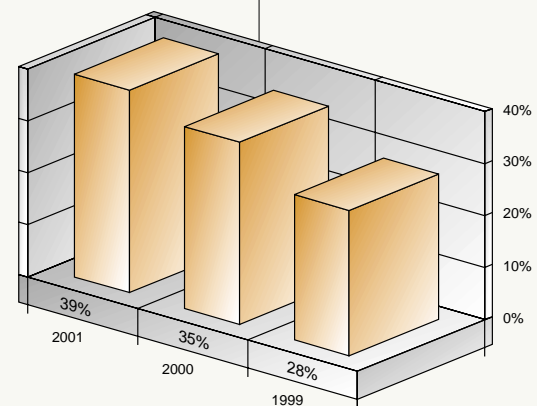
CONSUMERS ON SOYFOODS AND HEALTH



CONSUMER CONSUMPTION OF SOYFOODS



AWARENESS THAT SOY REDUCES RISK OF HEART DISEASE



Awareness of the health benefits of soyfoods has risen dramatically since the FDA approved a health claim for soy protein in 1999. The claim states that consumption of 25 grams of soy protein per day may reduce the risk of coronary heart disease. In 2001, 39 percent of consumers say they are aware of specific health benefits of soy in the diet. Of those, 39 percent are aware that soy may reduce the risk of heart disease as compared to 28 percent in 1999. Four in 10 consumers are aware of this benefit on an unaided basis.

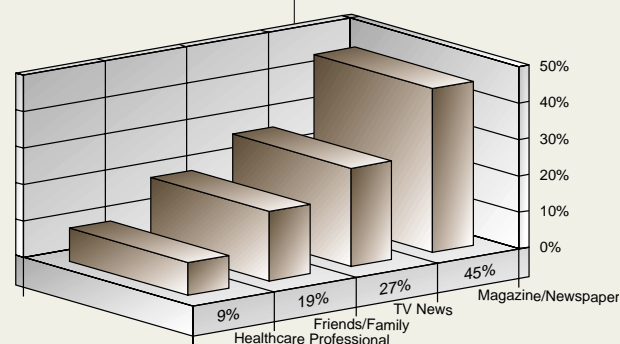
In regard to other health benefits, 18 percent of consumers are aware that soy may aid in cancer prevention and 14 percent are aware that soy may reduce the symptoms of

menopause. Of those who are aware of any health benefits, 26 percent report seeking out products specifically because they contain soy.

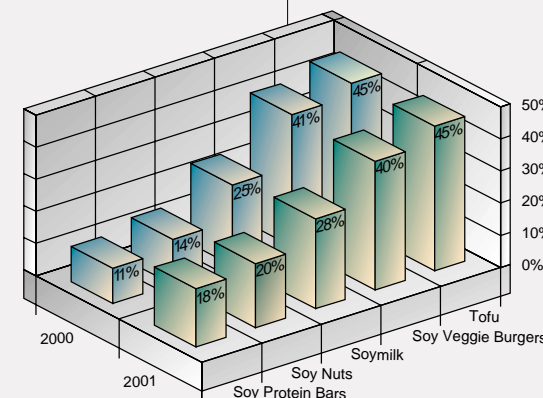
Overall, 69 percent of Americans recognize soyfoods as healthy, 22 percent have no opinion and nine percent feel soy is unhealthy.

Consistent with the increase in awareness of health benefits, consumers also report that they are hearing about soy more often. In 2001, 49 percent report hearing about soy and health, up from 42 percent in 1999 and 47 percent in 2000. Of those, 45 percent of consumers recall reading about soy in magazines and newspapers.

WHERE CONSUMERS GET INFORMATION ON SOY AND HEALTH



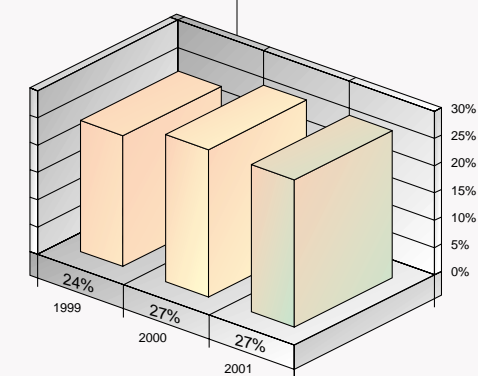
SOY PRODUCTS TRIED



Nearly all consumers (97 percent) are aware of soyfood products and many have tried them.

Tofu enjoys the highest level of trial at 45 percent. Soy veggie burgers, soymilk and soy nuts are also popular.

PERCENTAGE OF AMERICANS THAT CONSUME SOYFOODS WEEKLY



Consumers report using tofu, soymilk and soy veggie burgers most often.

Forty-two percent of Americans report that they consume soyfoods once a month or more. Twenty-seven percent consume soyfoods weekly.

MEDIA SOURCES AND NUTRITIONAL INFORMATION

Magazines are the most cited media source for nutritional information, followed by network TV news and newspapers. Fewer consumers rely on network TV news, newspapers, TV specials or TV commercials for nutritional information than in years past.





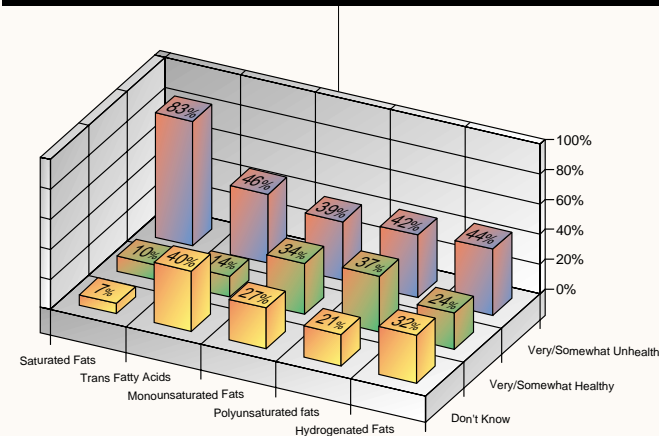
CONSUMER ATTITUDES ABOUT TRANS FATTY ACIDS

Eight in ten consumers recognize that saturated fats are unhealthy, but most consumers are less certain about other fats. More consumers think that mono and polyunsaturated fats are unhealthy than think these fats are healthy.

Consumers also continue to indicate confusion in regard to *trans* fatty acids. While 46 percent of consumers currently believe that *trans* fatty acids are very or somewhat unhealthy, 40 percent indicate that they “don’t know” and 14 percent believe *trans* fat is healthy. Forty-four percent believe hydrogenated vegetable oils are unhealthy.

Two thirds of consumers say they are unlikely to buy products labeled as containing *trans* fatty acids. Less than half (48 percent) feel they are unlikely to buy products labeled as containing hydrogenated vegetable oils.

PERCEPTIONS OF HEALTHINESS



Slightly more consumers believe that margarine is healthier than butter (47 to 44 percent, respectively).



CONSUMER PERCEPTIONS OF GENETICALLY MODIFIED FOOD, POLITICAL AND ACTIVIST ORGANIZATIONS AND PRICE INCREASES FOR LABELED FOODS

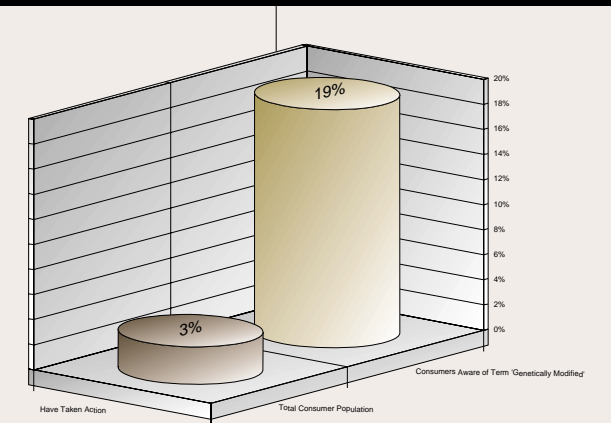
Consumer awareness of biotechnology rose from 58 percent in 2000 to 62 percent in 2001, a relatively small increase after the extensive coverage of the StarLink corn issue. (StarLink corn, a pest-resistant variety developed through biotechnology, was not approved for human consumption due to potential allergy concerns. The variety was found to have slipped into the food supply, sparking a massive recall. A government advisory panel later issued a report finding no link between Starlink corn and allergic reactions.)

The data suggests an opportunity to educate consumers regarding the potential benefits of biotechnology. While 17 percent have a generally positive view and 22 percent have a generally negative view, the remaining 61 percent are neutral or feel they don’t have enough information about the issue.

Less than two in ten consumers who are aware of the term “genetically modified” are also aware of political or activist groups involved in the issue, and three quarters of

these consumers cannot recall any specific group by name. In contrast, only thirteen percent of these consumers cite Greenpeace by name.

CONSUMERS WHO HAVE TAKEN ACTION BASED ON ACTIVIST GROUPS’ INFORMATION



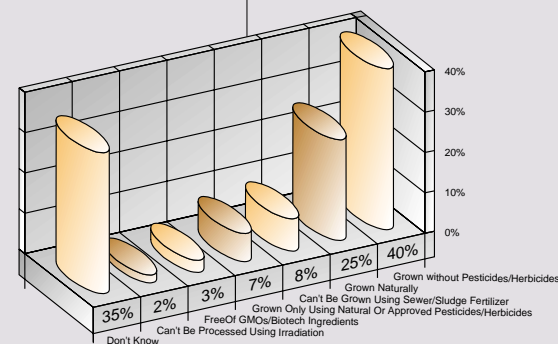
Among consumers aware of activist activity, 79 percent have never taken any action, such as boycotting products or writing food companies, based on information that activist groups provided. Projecting this figure back to the total population represented in this survey, less than four percent have taken any action.

If an organization such as Greenpeace published negative information about genetically modified ingredients in products they normally buy, 7 in 10 consumers would either continue to purchase those products or consider continuing to purchase those products.

Similarly, if a food product that consumers normally buy raised its price and had a label claiming that it was “non-GMO,” about 7 in 10 consumers would refuse to pay more or would consider not paying more for that product.

CONSUMER PERCEPTION AND KNOWLEDGE OF ORGANIC FOODS

REQUIREMENTS FOR A FOOD TO BE CALLED ‘ORGANIC’



Thirty-five percent of consumers buy organic food products either frequently or sometimes, while 26 percent do so rarely and 27 percent never purchase organics.

The majority of consumers concerned about biotechnology are not aware of the alternatives they already have. Only three percent of consumers know, without prompting, that organic foods can’t contain genetically modified ingredients by law, compared to the much larger 40 percent who are aware that organics must be grown without pesticides or herbicides. Additionally, 35 percent cannot name any requirements for a food to be called “organic.”

AWARE OF TERM ‘GENETICALLY MODIFIED’

