



CONSUMER ATTITUDES ABOUT NUTRITION

Insights into Nutrition, Health and Soyfoods



13th

thirteenth annual survey

This 13th annual nationwide survey provides vital information on consumer attitudes and perceptions about health and nutrition issues. Sponsored by the United Soybean Board (USB), this report takes an in-depth look at:

- Nutrition attitudes and their effect on purchasing decisions
- Consumer awareness of health benefits regarding soy products
- Attitudes about different types of fat
- Nutritional habits and obesity concerns
- Restaurant and home consumption of soy

Methodology

Our methodology changed significantly in 2006, from telephone interviews to an online self-administered survey. Conducted by an independent research firm in February and March 2006, the study includes 1,000 random surveys, providing a sample that is consistent with the total American population. The study's margin of error remains +/- 1.9-3.1 percent, with a confidence interval of 95 percent.

Results are generally quite comparable. However, when presented with comparisons between 2006 data and previous years, we recommend that the reader view the data for general trending purposes rather than for specific market shifts.

Additionally, we administered a sensory evaluation study for soybean oil to 53 participants in Seattle, Washington, in August 2005. While not statistically significant, the qualitative comments provide interesting anecdotal feedback to the food industry. This study will be referred to as the "sensory evaluation" within this report.

About USB

USB serves as a resource for soybean-related educational materials. Healthcare and food professionals can utilize this study and other USB resources when making decisions on consumer nutrition. Please visit USB's Web site at www.talksoy.com to view soy-specific materials, up-to-date health research, recipes and the *Soy Connection* newsletter.

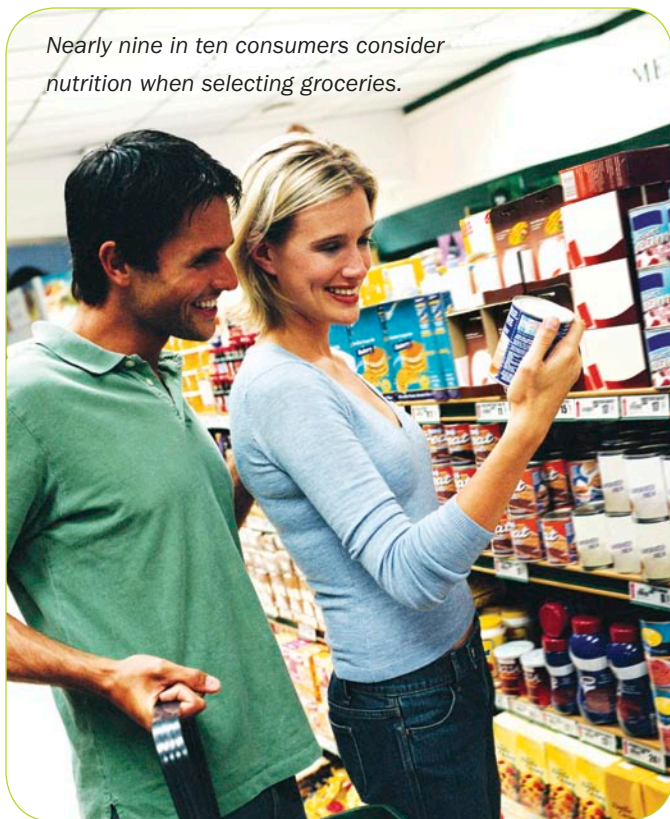


Nutritional Habits and Obesity Concerns

Interest and involvement in nutrition and health issues remains high among U.S. consumers. Almost nine in ten are at least somewhat concerned about nutritional content (87 percent) and rate nutrition important in selecting groceries (86 percent).

About three-quarters of consumers say they have changed eating habits in the past three to five years due to health concerns. However, consumers' willingness to pay more for healthy or healthier versions of foods continues to decline with a little over half (53 percent) willing to pay more in 2006, compared to 64 percent in 2005.

Nearly nine in ten consumers consider nutrition when selecting groceries.



CONSUMERS' FAT INTAKE STRATEGIES FOR IMPROVING OVERALL HEALTH

47%

Following a moderate fat diet, but choosing "good" fats over "bad"

31%

Both equally effective

12%

Following a low-fat diet by reducing all fats

10%

Don't know

Healthy Food Decisions

Over half (55 percent) of consumers agree with the statement "Information about health and nutrition is too confusing," on par with recent years. But, the vast majority still considers the Nutrition Facts Label important in deciding which food to buy (88 percent).

Overall health maintenance – for example, watching fat or sugar intake or counting calories – appears to be the primary reason for viewing the Nutrition Facts Label. Avoiding or managing a specific health condition – such as heart disease or diabetes – is a secondary concern.

Almost half (47 percent) believe the most effective strategy for improving overall health is to follow a moderate fat diet but choose "good fats" over "bad" fats, rather than adopt an overall low-fat diet by reducing all fat intake (12 percent). And, 53 percent agree that consuming soy products can play a role in reducing obesity. Four in five consumers perceive soy products as healthy.

Since 2003, survey participants have reversed themselves each year on who has primary responsibility for obesity in America, choosing between individual responsibility for their own health and the fast-food industry as the top two contenders. This year, individual responsibility regained the top position at 27 percent, followed closely by fast food at 23 percent.



Consumers depend on soybean oil – commonly marketed as vegetable oil – as one of their two most frequent cooking oils.

Cooking Oil Impressions

Consumers continue to recognize olive oil (87 percent) and soybean oil (76 percent) as the two healthiest oils. Canola ranks third (72 percent), followed by safflower (68 percent), sunflower (64 percent) and flax seed (63 percent). As in past years, vegetable oil – commonly soybean oil – is second only to olive oil in terms of cooking oil consumers perceive using most frequently.

Those consumers who are aware of soybean oil’s specific health attributes say it contains less total fat (19 percent), contains unsaturated “good” fats (6 percent), has no/low cholesterol (6 percent) or helps reduce cholesterol (5 percent).

In the sensory evaluation, participants who preferred the oatmeal cookie containing soybean oil commented on its “wonderful texture,” “rich and buttery” flavor, “nice appearance,” “chewiest” mouthfeel, “most flavor” and “softest texture.”

Consumer Attitudes About Fats

Despite interest in choosing “good” fats, consumers demonstrate confusion over the different types of fats. Omega-3 fatty acids remain the only type of fat more consumers rate healthy than unhealthy, while saturated fat continues to be viewed as the unhealthiest fat. However most Americans cannot properly assess the role of “good” fats, such as mono- and poly- unsaturated fat.

Specifically, 62 percent believe omega-3 fatty acids are healthy, 34 percent say the same for polyunsaturated fats, 30 percent for monounsaturated fats, 20 percent for hydrogenated vegetable oils, 11 percent for trans fats and 8 percent for saturated fats.

FATS CONSUMERS VIEW AS HEALTHY

Omega-3 fatty acids	62%
Polyunsaturated fats	34%
Monounsaturated fats	30%
Hydrogenated vegetable oils	20%
Trans fats	11%
Saturated fats	8%





Fifty-five percent of Americans would be more likely to purchase products reformulated to eliminate trans fats.

Consumers continue to say they would be less likely to buy foods with hydrogenated vegetable oil or trans fatty acids listed on the Nutrition Facts Label. And, over half (55 percent in 2006 and 50 percent in 2005) would be more likely to buy a product that they currently enjoy, if the food company reformulated the product in order to label it “trans fat free.”

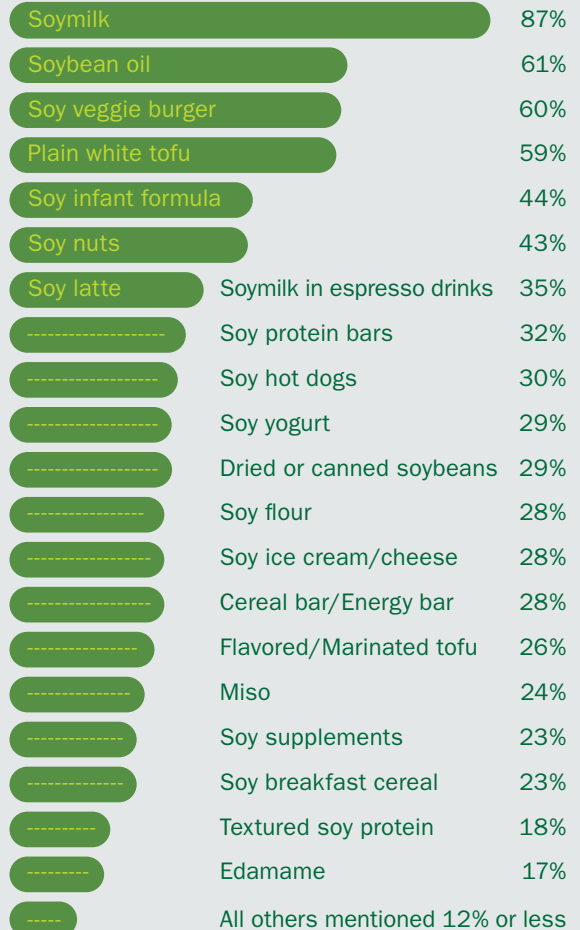
In the sensory evaluation, participants were asked to compare potato chips prepared in oils with different fat profiles, including ones that allow chips to be fried without creating trans fats. The participants could not discern the difference between potato chips fried in traditional oils and a new low-linolenic soybean oil (the trans fat free option). This suggests that food companies can substitute oils for healthier products without consumers noticing a difference in taste.

For the small group who could detect a difference, 63 percent of participants chose low-linolenic as their favorite. They commented that the chips fried in low-linolenic oil were “very crispy,” “crunchiest,” “tasted light” and had the “best flavor.” The participants felt they could “taste more potato flavor.”

Awareness and Usage of Soy Products

Thirty percent of Americans consume soyfoods or soy beverages once a month or more. For the third year in a row, consumers reported the most familiarity with soymilk, soybean oil, soy veggie burgers and plain tofu.

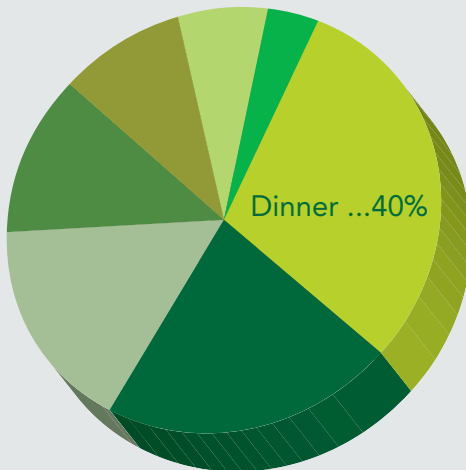
TOP 20 SOY PRODUCTS BY AWARENESS



Occasion Preferences for Consuming Soy

As in 2004 and 2005, consumers favor dinner as the most popular meal for consuming soy products (40 percent). Other respondents cite their favorite soy eating occasion as breakfast (29 percent), lunch (22 percent), mid-afternoon snacking (16 percent), late evening snacking (12 percent), mid-morning snacking (9 percent) and desserts (5 percent).

CONSUMER PREFERENCES FOR CONSUMING SOY



Breakfast.....	29%
Lunch	22%
Mid-afternoon snack	16%
Late-evening snack	12%
Mid-morning snack	16%
Dessert	5%



Restaurants and Soy Products

Over half of consumers have tried soy foods or beverages in restaurants. Most order tofu (29 percent), veggie burgers (29 percent) or soymilk (28 percent). Over one-third would order soy products in restaurants (namely, a soy veggie burger or soymilk), if they could find soy on their restaurant's menu.

SOY PRODUCTS ORDERED IN RESTAURANTS

Soy veggie burger	29%
Tofu (unspecified)	29%
Soymilk	28%
Miso	14%
Edamame	8%
Tofu (prepared)	6%
Beverages (general)	6%
Don't know	7%
All others mentioned 5% or less	

Soyfoods in Health

In 2006, 82 percent of consumers rate soy products as healthy, significantly more than previous years. Consumers recognize soy foods and beverages for their low-fat profile (20 percent), protein content (15 percent), heart health function (15 percent), cholesterol lowering properties (12 percent), generally “being good for you” (10 percent) and providing a lactose-free option (10 percent).

An increasing number of consumers specifically seek out products containing soy for health reasons (at 31 percent in the 2006 online survey, compared to 27 percent and 26 percent in the 2004 and 2005 telephone surveys, respectively).

One-third of consumers (35 percent) say they are aware of the FDA claim that consuming 25 grams of soy protein per day reduces the risk of coronary heart disease. Ninety-four percent either agree with the health claim or would like more information.

As in recent years, about half of consumers say they are interested in a combination ground meat/soy product, with 66 percent preferring beef as the ground meat involved.

HEALTH PERCEPTIONS OF SOY

Low-fat profile	20%
Protein content	15%
Heart health	15%
Cholesterol lowering properties	12%
“Being good for you”	10%
A lactose-free option	10%

INCREASE IN AWARENESS OF SOY AS HEALTHY

YEAR	METHOD	RATE SOY HEALTHY
1998	TELEPHONE	67%
1999	TELEPHONE	71%
2000	TELEPHONE	76%
2001	TELEPHONE	69%
2002	TELEPHONE	74%
2003	TELEPHONE	74%
2004	TELEPHONE	74%
2005	TELEPHONE	78%
2006	ONLINE	82%



Consumers increasingly seek out products containing soy for health reasons.



A farmer-led organization comprised of 64 farmer-directors, the United Soybean Board oversees the investments of the soybean checkoff on behalf of all U.S. soybean farmers. For more information, please visit: www.talksoy.com 6322-062006-2000