

HEALTH

TRANS

OMEGA-3

OILS

BALANCE

GOOD FAT

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OBESITY

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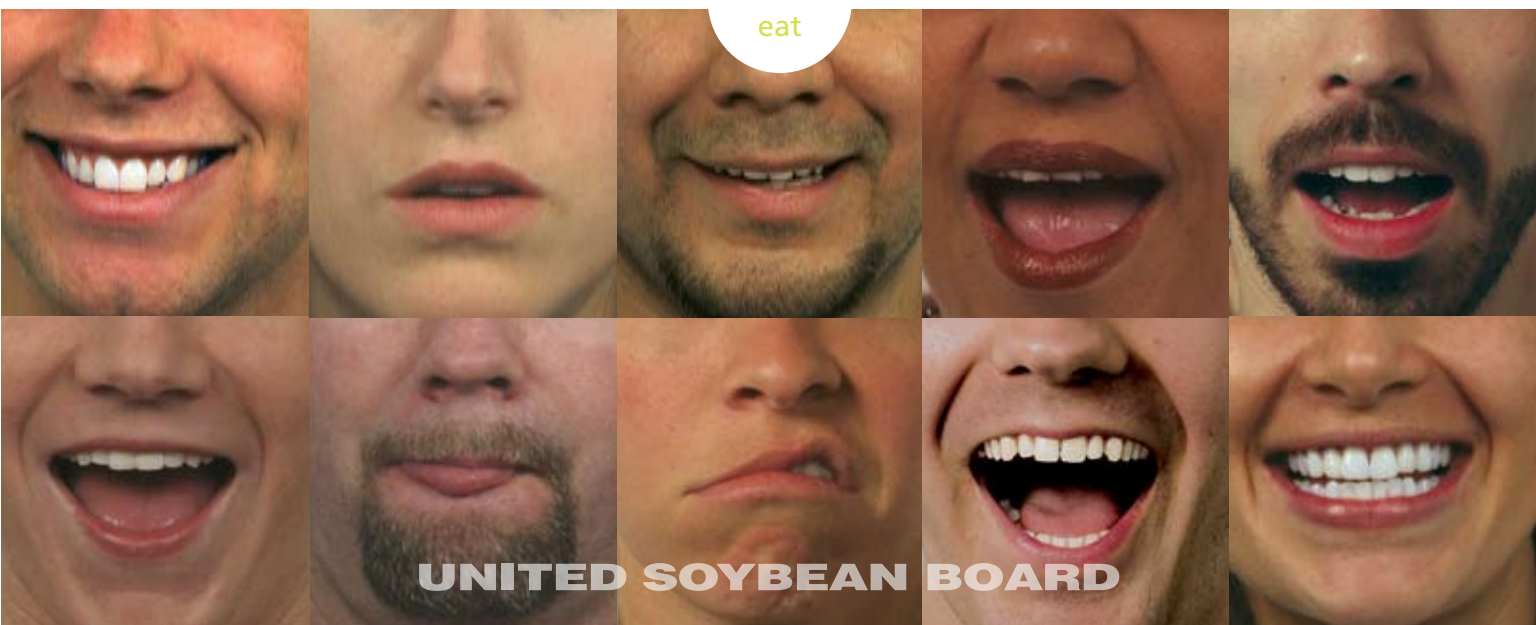
HABITS

think

15TH ANNUAL

CONSUMER ATTITUDES ABOUT NUTRITION

Insights into Nutrition, Health & Soyfoods



eat

UNITED SOYBEAN BOARD

Consumer Attitudes about Nutrition 2008

Introduction

This 15th 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
- Nutritional habits and obesity concerns
- Consumer awareness of health benefits regarding soy products
- Attitudes about different types of fat and oils
- Restaurant and home consumption of soy

Methodology

The United Soybean Board conducted the first Consumer Attitudes about Nutrition study in 1994. Over the years, this annual survey has become more detailed to address current topics of interest to the food industry. As such, we have provided multiple years of trending data, where available.

This year represents the third year we have adopted an online self-administered survey as our methodology, a significant change from telephone interviews conducted in previous years. The survey, conducted by an independent research firm in February 2008, 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 between methodologies. However, when presented with comparisons between 2006 to 2008 data and previous years, we recommend that the reader view the data for general trending purposes rather than for specific market shifts.

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 www.soyconnection.com to view soy-specific materials, up-to-date health research, recipes and the Soy Connection newsletter.



15th
Annual Survey

Nutritional Attitudes, Habits & Obesity Concerns

Interest and involvement in nutrition and health issues remains high among U.S. consumers. Nearly nine in ten consumers are at least somewhat concerned about nutritional content and rate nutrition important in selecting groceries, a number that has remained consistent over the last ten years.

Since 1998, the percentage of consumers who say they are “very concerned” about nutritional content has decreased from 49 percent in 1998 to 35 percent in 2008, a significant 14 percent drop; however, the percentage that are at least “somewhat concerned” has increased over this same period of time (37 percent in 1998 compared to 54 percent in 2008).

Nearly three-quarters of consumers say they have changed eating habits in the past three to five years due to health concerns. This finding has been consistent over the last 15 years of the study with an average of 70 percent of consumers changing their eating habits overall.



Nearly nine in ten consumers consider nutrition when selecting groceries.

In 2008, the majority of consumers (56 percent) are still willing to pay more for healthy or healthier versions of food, compared to 60 percent in 2007 and 53 percent in 2006.

Over half (52 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 (91 percent).

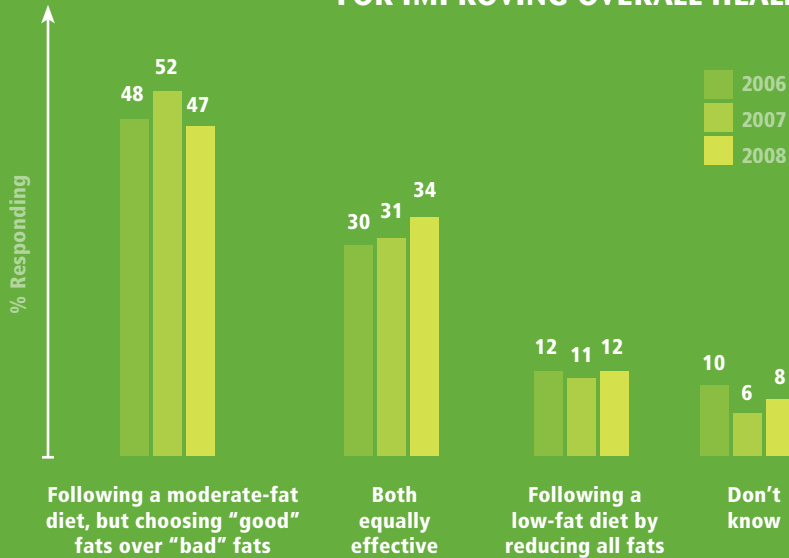
Overall health maintenance – for example, counting calories or watching fat, sodium or sugar intake – appears to be the primary reason for viewing the Nutrition Facts Label. Avoiding or managing a specific health condition – such as heart disease or diabetes – is a secondary concern.

Compared to 2007, significantly more consumers who pay attention to carbohydrate, fat or calories on the Nutrition Facts label cite potential weight gain as their reason for doing so.

In 2008, sixteen percent of consumers named total calories as the single item they pay attention to most often when reading a Nutrition Facts Label, while trans fat was the leader in 2007.

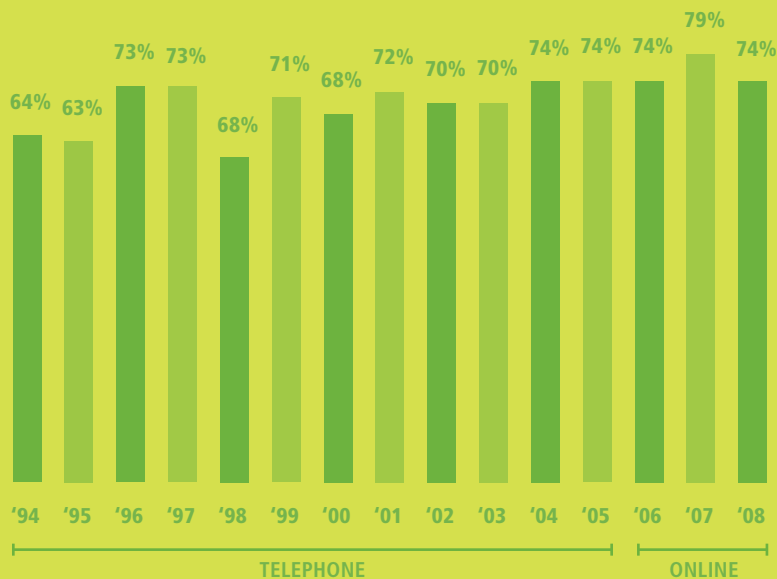
Interest in calories is up significantly from 2007 (then, only 12 percent). The study shows a corresponding rise in the number of people who pay most attention to total fat, 12 percent in 2008 as opposed to 10 percent in 2007.

CONSUMERS' FAT INTAKE STRATEGIES FOR IMPROVING OVERALL HEALTH



Over half of consumers (55 percent) agree consuming soy-based foods can play a role in reducing obesity.

CHANGED EATING HABITS DUE TO HEALTH AND NUTRITION CONCERNS



Healthy Eating Strategies

From 2003 to 2006, survey participants reversed themselves on who has primary responsibility for obesity in America. In 2008, individual responsibility maintained the top position for the third year in a row at 27 percent, followed closely by fast food at 23 percent.

This year, significantly fewer consumers (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). An increasing number feel both strategies are equally effective (34 percent in 2008, up three points from 2007).

Soyfoods and Health

In 2008, 85 percent of consumers rate soy products as healthy, on par with 2007 and up three percentage points from 2006. Looking at the long-term trend, consumer awareness of soy as healthy has dramatically increased by 26 percentage points over the last 11 years.

On an unaided basis, consumers recognize soyfoods and beverages for generally “being good for you” (19 percent), protein content (17 percent), their low-fat profile (15 percent), heart health function (15 percent), cholesterol lowering properties (13 percent), and potentially providing relief from menopause symptoms (10 percent).

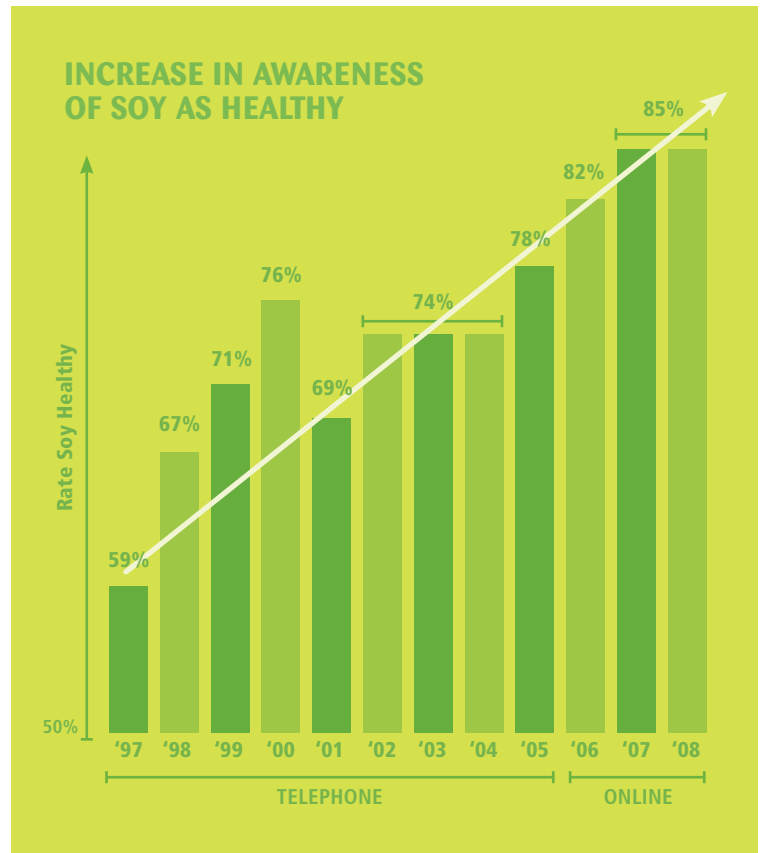
On an aided basis, consumers most often recognize the health benefits of soy in relation to weight management, obesity prevention and as an aid in weight loss (31 percent), reducing the risks of coronary heart disease (31 percent) and reducing the risk of some cancers (23 percent).

Among consumers aware of the health benefits of soy, respondents stated that they usually gather their information from television (48 percent), the Internet (41 percent), magazines (38 percent) or word-of-mouth (33 percent).

Consumers continue to specifically seek out products containing soy for health reasons, at 35 percent in the 2008 online survey, compared to 37 percent in 2007 and 31 percent in 2006. Over the long term, this number has increased nine points from 26 percent in 2001. Fewer than one in ten consumers have any negative associations with soy’s health profile, consistent with past years’ results.

Over one-third of consumers (34 percent) say they are aware of the FDA-approved health claim that consuming 25 grams of soy protein per day reduces the risk of coronary heart disease. Ninety-five percent either agree with the health claim or would like more information.

As in recent years, over half of consumers say they are interested in a combination ground meat/soy product, with 62 percent preferring beef as the ground meat involved.



Consumers' primary sources for health information have changed dramatically since the first year of research. In 2008, 41 percent of consumers consider the Internet a useful resource for information on soy and health, second only to television news at 48 percent. One can also infer from the data that an increasing number of consumers now rely on multiple sources of information as they seek to educate themselves about health and nutrition.



Cooking Oil Impressions

Across the board, consumers rated most oils less healthy in 2008 than in previous years. However, consumers recognize olive oil (87 percent), flaxseed oil (71 percent), canola oil (70 percent) and soybean oil (68 percent) as the healthiest oils. Sunflower ranks fifth (64 percent), followed by safflower (60 percent). Consumers rate soybean oil as the third most “very healthy” oil, behind olive and flaxseed oils.

As in past years, soybean oil — commonly marketed as vegetable oil — is second only to olive oil in terms of cooking oil used most frequently.

Consumers are becoming increasingly aware of enhanced soybean varieties (ten percent in 2008 compared to nine percent in 2007 and five percent in 2006). This number may grow as more companies like Kellogg and KFC switch to enhanced soybean oils for improved product functionality, health and nutrition.

In the coming years, additional varieties of enhanced soybeans and soybean oil, such as increased oleic, low-saturate and increased omega-3 traits, will be available to food companies for product formulation, potentially influencing this trend of increased consumer awareness.

Consumers depend on soybean oil – commonly marketed as vegetable oil – as one of their two most frequent cooking oils and three most “very healthy” oils.

Sources Of Health And Nutrition Information* THEN & NOW

	1994	2008
Magazines.....	25%	38%
Television.....	25%	48%
Newspapers.....	12%	30%
Doctor/Other Health Professional.....	12%	20%
Family & Friends.....	6%	33%
Internet.....	N/A	41%

*All others mentioned 6 percent or less



Over one-third of consumers seek out products containing soy for health reasons.

Consumer Attitudes about Fats

Heart-healthy omega-3 fatty acids remain the only type of fat more consumers rate more healthy than unhealthy, while most consumers fail to recognize unsaturated fats as healthy choices.

In 2007, consumers had undeniably digested the news about trans fat. This trend continues in 2008, as 89 percent of consumers view trans fat as somewhat to very unhealthy. This year also represents the second year trans fats surpassed saturated fat when challenged to choose the least healthy fat.

In a direct comparison between saturated and trans fats, more consumers say that saturated fats are healthier; however, this figure is significantly lower in 2008 compared to 2007. The narrowing gulf between trans and saturated fat perception suggests the need for food companies to develop products low in both of these harmful types of fat.



Sixty percent of Americans would be more likely to purchase products reformulated to eliminate trans fats.

Trans Fat Awareness and Opinion

Over half of all consumers (54 percent) are aware of media coverage about trans fats, a significant decrease over 2007 (65 percent).

When asked what specific stories consumers recalled about trans fats in the media, 41 percent cited obesity and weight concerns (up from 33 percent in 2007), 12 percent cited restaurants such as KFC and McDonald's removing trans fats from their food, 11 percent cited the New York City ban on trans fats and 10 percent mentioned the increased risk of coronary heart disease. It is important to note that companies like KFC used enhanced soybean oils to create products with zero grams of 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. Nearly half (42 percent) are very unlikely to purchase foods with trans fat listed on the label, a slight decrease from 2007 (45 percent).

Over half (60 percent in 2008, compared to 65 percent in 2007) of consumers would be more likely to buy a product that they currently enjoy if the food company reformulated the product in order to list zero grams of trans fats on the product label.



Omega-3 fatty acids remain the only type of fat more consumers rate more healthy than unhealthy, while most consumers fail to recognize unsaturated fats as healthy choices.

Perceived Healthiness of Saturated Fat vs. Trans Fat

	2003	2004	2005	2006	2007	2008
Saturated fats healthier	30%	32%	28%	26%	42%	36%
Trans fat healthier	41%	40%	30%	22%	16%	17%

Fats Consumers View as Very/Somewhat Healthy in 2008

Omega- 3 fatty acids	66%
Polyunsaturated fats	29%
Monounsaturated fats	29%
Hydrogenated vegetable oils	16%
Trans fats	9%
Saturated fats	6%

TOP 20 SOY PRODUCTS BY AWARENESS

Soy milk	86%
Soybean oil	57
Soy veggie burger	54
Tofu (unspecified)	52
Soy infant formula	41
Soy nuts	39
Soy latte/soymilk in espresso drinks	34
Soy protein bars	34
Dried or canned soybeans	29
Soy yogurt	29
Soy flour.....	26
Soy ice cream/cheese.....	26
Soy hot dogs.....	25
Flavored/marinated tofu	23
Miso	23
Soy supplements	22
Cereal bar/energy bar	22
Edamame	21
Soy breakfast cereal	21
Textured soy protein.....	15

All others mentioned by 14% or less



Awareness & Usage of Soy Products

Thirty-two percent of Americans consume soyfoods or soy beverages once a month or more, on par with 2007. For the fifth year in a row, consumers reported the most familiarity with soymilk, soybean oil, soy veggie burgers and tofu.

Trial of Soyfoods

Over the last ten years, an increasing range of soy products have entered the marketplace, affording consumers more options and occasions for consuming soy. For comparison, in 1998, 18 percent of consumers reported that they had tried soymilk. By 2008, the number of consumers who have tried soymilk has more than doubled to 40 percent of all consumers. Trial and consumption of other products such as edamame, which only three percent of consumers had tried in 2000, are also on the rise (15 percent in 2008).

Occasion Preferences for Consuming Soy

As in the previous five years, consumers favor dinner as the most popular meal for consuming soy products (34 percent). Other respondents cite their favorite occasion for eating soy as breakfast (31 percent, up 3 points from 2007), lunch (21 percent), mid-afternoon snacking (19 percent), late evening snacking (15 percent), mid-morning snacking (12 percent) and desserts (5 percent).

Restaurants and Soy Products

Over half of consumers have tried soyfoods or soy beverages in restaurants. Most order soymilk (17 percent), tofu (15 percent) or veggie burgers (12 percent). Miso, soy ingredients in Asian cuisine and soy lattes were also named. One-third of consumers would order soy products in restaurants (namely, soymilk or a soy veggie burger), if they could find soy on their restaurant's menu, suggesting a menu development opportunity.





A farmer-led organization comprised of 68 farmer-directors, the United Soybean Board oversees the investments of the soybean checkoff of all U.S. soybean farmers.

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