

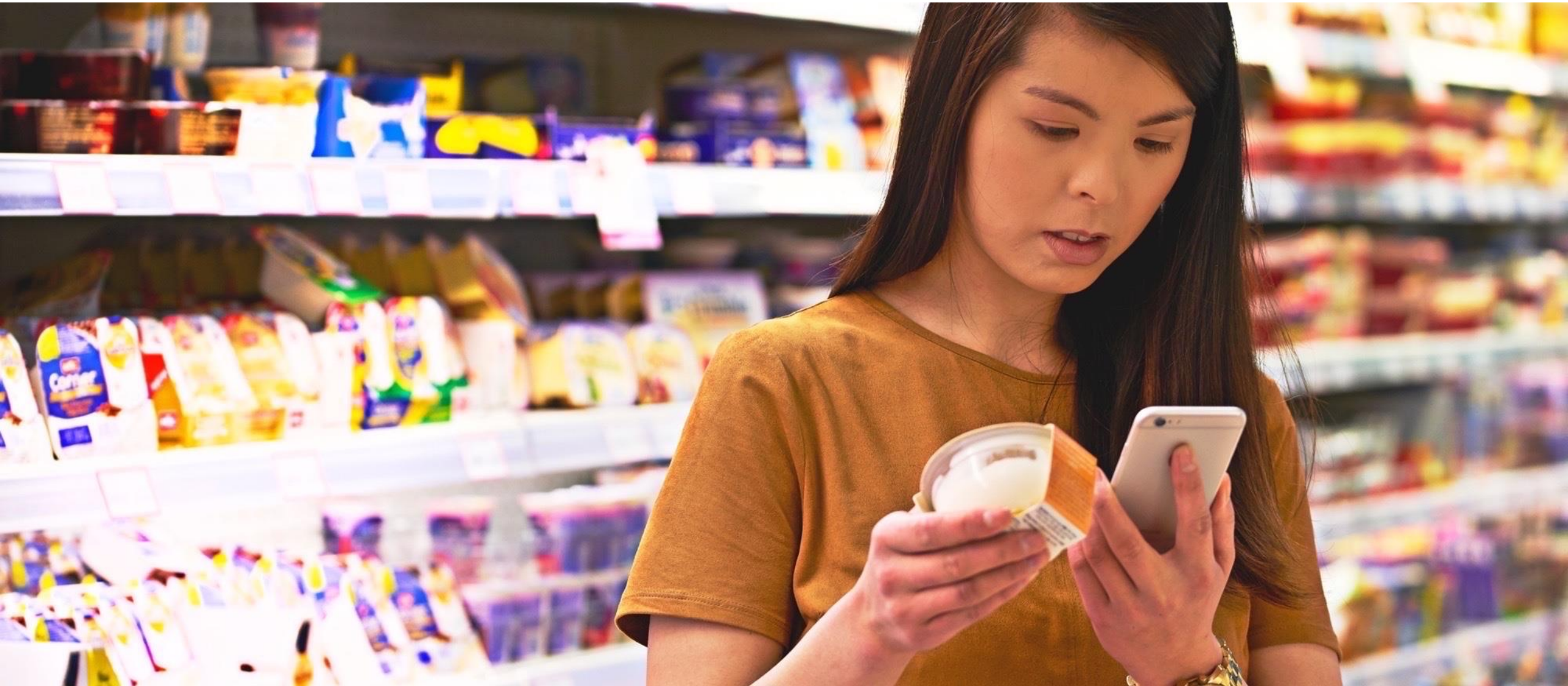


Meeting the Needs of Today's ProActive, Health-Conscious Consumer: a Kerry Perspective



Alexandra Boelrijk PhD
Senior Director R&D ProActive Health

Consumer-led Revolution



The '&' Consumer

Sustainability Impact
and Purpose

&

Plant-Based Options

&

Functional Food for Specific
Health & Wellness Needs

&

Taste Without
Compromise

&

Cleaner Labels: Trusted &
Reduced Number of Ingredients

&

Authentic and Safe

&

Digital / Delivered

&

Locally Sourced



Creating A World of Sustainable Nutrition

Enabling our Customers Move Along the Sustainable Nutrition Spectrum





Agenda

Market and Consumer trends in Health needs

Innovating with Science

Immune Health

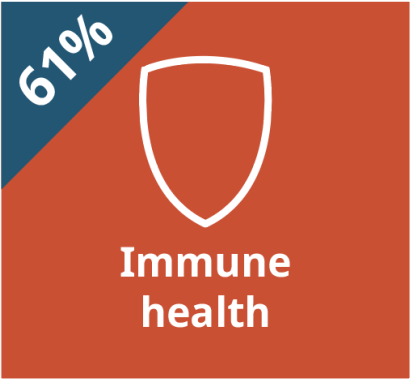
Digestive Health / Protein Absorption

Creating a superior consumer experience

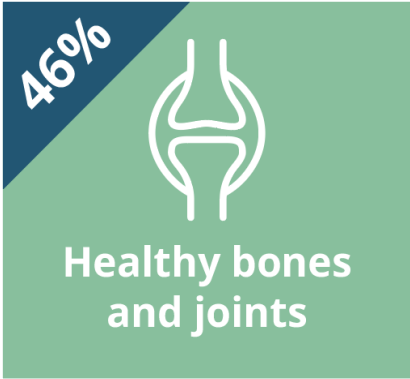
Conclusion & Key Takeaways



What health benefits do EU consumers seek in healthy lifestyle products?



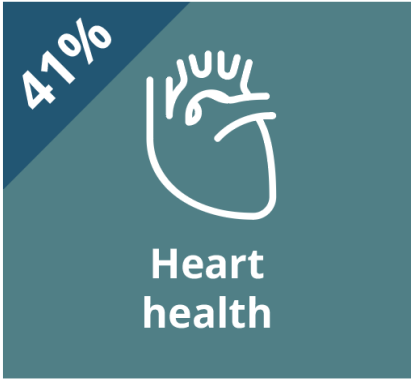
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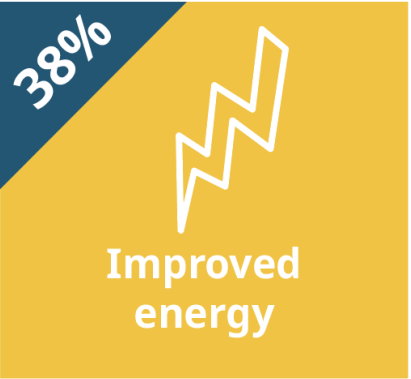
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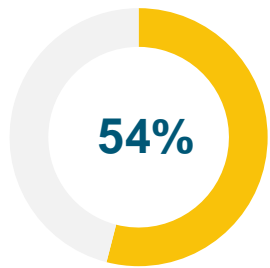
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Build trust and credibility with science-backed branded ingredients

Science-backed products and simplifying steps to doing own research are key to building trust



UK consumers **don't trust brands** because they believe they can make **misleading health claims** around ingredients used in products.¹

7 in 10 Consumers feel big food companies are more concerned about profits than food ethics.²

An icon representing 10 people, with 7 people highlighted in green and 3 in white.

Top European consumer purchase drivers include³:



Doing their own research on the product's ingredients and benefits **38%**



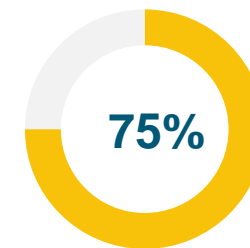
Clear information on the label regarding efficacy **33%**



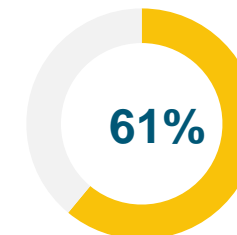
Research or scientific data claims **32%**

Strong branding also resonates – recognizing a strong brand is key to purchase

43% of European consumers say they would be **more likely to buy** immune supporting products if they contained a **branded health ingredient**.¹



In Europe, **3 in 4** respondents consider the Wellmune brand description to be **believable**, with **purchase intent** of products with this brand to be **over 70%**.³



61% of respondents who would consider purchasing products with Wellmune would be **willing to pay more**.³

Innovation in Health Ingredients with Science & Technology



KHNI
Kerry Health and
Nutrition Institute™

Globally recognised scientific
thought leadership



Delivery & Bioavailability

Excipients, coatings,
encapsulation, targeted
delivery, stability kinetics



Bio-Processing

Fermentation, encapsulation,
filtration, hydrolysis, extraction



Discovery

Proprietary probiotics, bioactives,
postbiotics, proteins, enzymes,
botanicals, artificial intelligence
digital tools



Screening Platforms

In-vitro & *In-vivo* assays, predictive
models, cell culture, sequencing,
bioinformatics, metabolomics



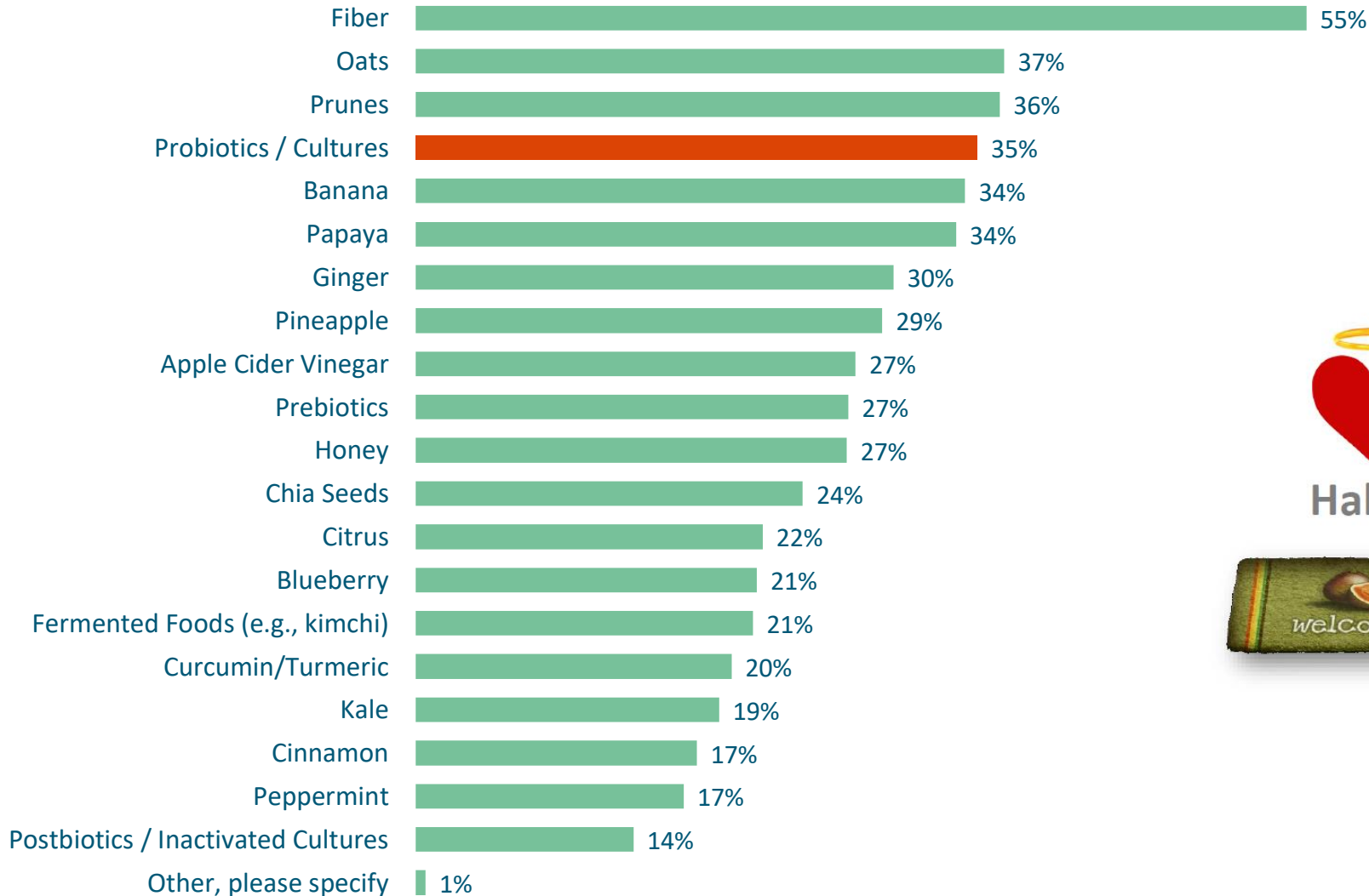
Clinical Science

Clinical safety & efficacy validation,
placebo & randomised controlled
studies, varying need states, diverse
demographics and multi-regional



Bringing science backed ingredients to life for consumers

Ingredients that consumers associate with good digestive health





Wellmune® is a natural food, beverage and supplement ingredient clinically proven to help strengthen the immune system.

A proprietary baker's yeast beta 1,3/1,6 glucan, **Wellmune makes it easier for people of all ages to be well and stay well.**

- Supported by over a dozen clinical studies, research supports Wellmune's ability to:
 - ✓ Improve general immune health
 - ✓ Maintain overall physical health
 - ✓ Protect against the harmful effects of stress
 - ✓ Promote healthy energy levels and mental clarity.
- A patented, award-winning global brand.
- Kosher & Halal certified, gluten-free, allergen-free and available in Non-GMO Project Verified.
- Safe for everyday consumption with broad regulatory approvals.

70% Of global consumers have made changes to their diets and lifestyles in the last twelve months to improve their immunity levels.

72% Of global consumers are interested in purchasing products with Wellmune.



Sources Kerry Global Consumer Survey – Digestive & Immune Health, 2019, FMCG Gurus - What's Next for Immune Health in 2021 - Global Report, January 2021

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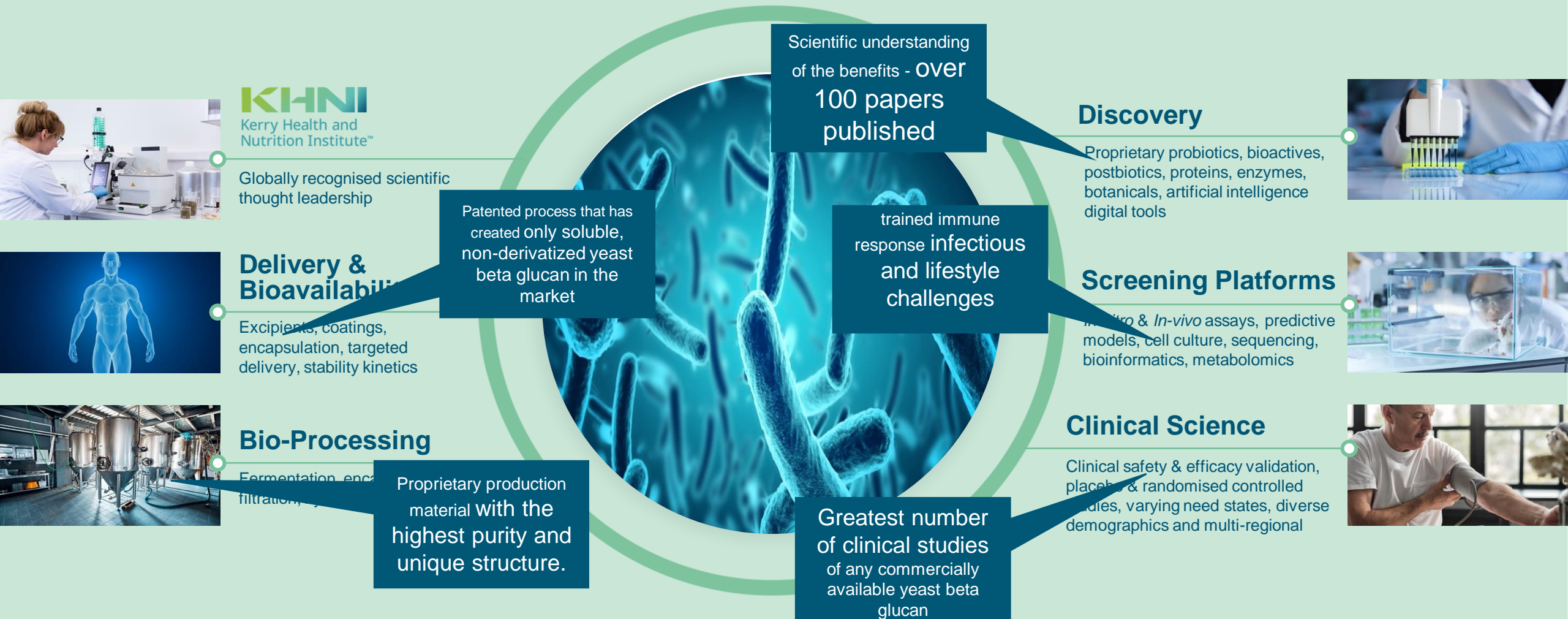
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Lemon and Ginger Protein Iced Tea Powered by Wellmune® Blend

Great tasting refreshing vegan iced tea with proteins that offers science-backed immune support for all family members.

Claims

- Source of protein
- Immune support (263mg of Wellmune® Blend/330ml serving)

Other possible claims

- Vegan
- Tea extract (0.12%)
- Source of Zinc (Zinc contributes to the normal function of the immune system)

Nutritional Facts per 100mL

Calories	Fat	Carbs	Sugar	Protein	Fiber
22Kcal	<0.1g	4.6g	4.5g	0.8g	<0.1g

Featured Kerry technologies

Kerry Prodiem™ Refresh Pea
For protein fortification with optimal clarity and stability in association with selected tea extract.

Wellmune® Blend
A baker's yeast beta glucan combined with Zinc. Zinc contributes to the normal function of the immune system.

Kerry Tastesense™
Balancing flavour and amplifying the total profile by delivering fruity taste without off-notes

*Additional Kerry technologies also included to complete concept



Kerry Prodiem™ Refresh **Kerry Tastesense™**



Introducing BC30™ Probiotic

BC30™ (*Bacillus coagulans* GBI-30, 6086®) is a **spore-forming, patented probiotic ingredient** that can be formulated into almost any food, beverage or companion animal product.

It's a **highly stable probiotic** with the ability to survive harsh manufacturing processes, product shelf-life and the journey through the digestive system.

The strain is supported by **more than 25 published research papers** confirming it's safety, efficacy and ability to support the following benefits:

- Probiotic
- Immune Health
- Digestive Health
- Protein Absorption

BC30 is also: Kosher & Halal certified, gluten-free, allergen-free and available in Non-GMO Project verified and organic compliant.

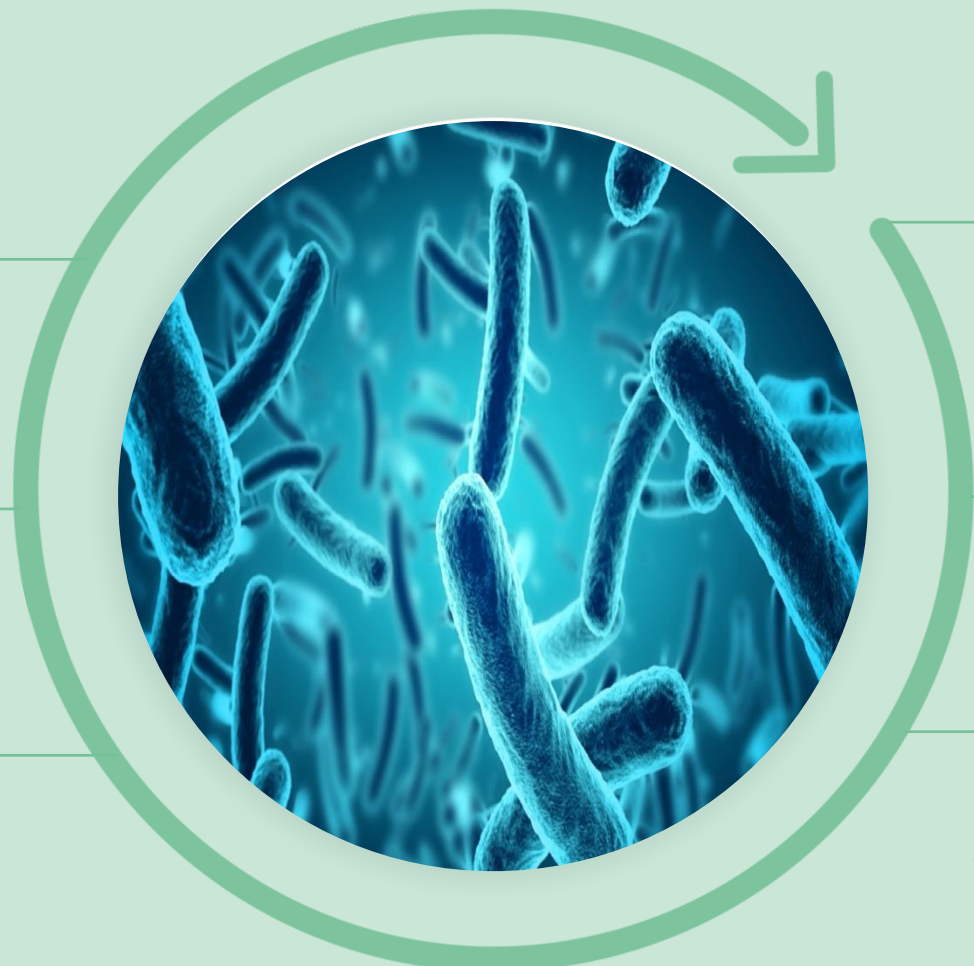
74%

Of global consumers say science-based claims are important when buying probiotics.

76%

Of global consumers are interested in purchasing products with BC30.





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Excipients, coatings, encapsulation, targeted delivery, stability kinetics



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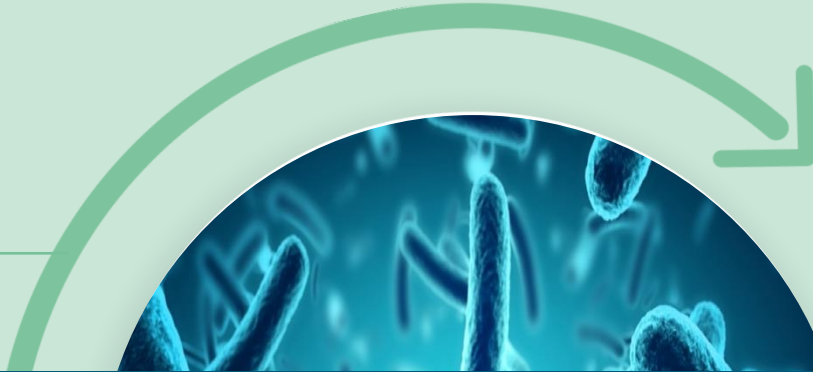
Clinical safety & efficacy validation, placebo & randomised controlled studies, varying need states, diverse demographics and multi-regional





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Clinical study evaluating BC30™ and impact on plant protein digestion

Conclusion: BC30 improves plant protein absorption in humans

Study Protocol

Study Site	Exercise and Performance Nutrition Laboratory, School of Health Sciences Lindenwood University, St. Charles Missouri
Population	30 healthy older females
Age	50-70 years, average 63.5
Design	Double-blind, randomized, controlled, crossover study
Duration	7 weeks total; 2 weeks supplementation, 3 weeks washout, 2 weeks supplementation
Serving	1 billion CFU BC30 + 27g of ProDiem™ Complete PR (pea + rice protein concentrate) daily (=20g protein)



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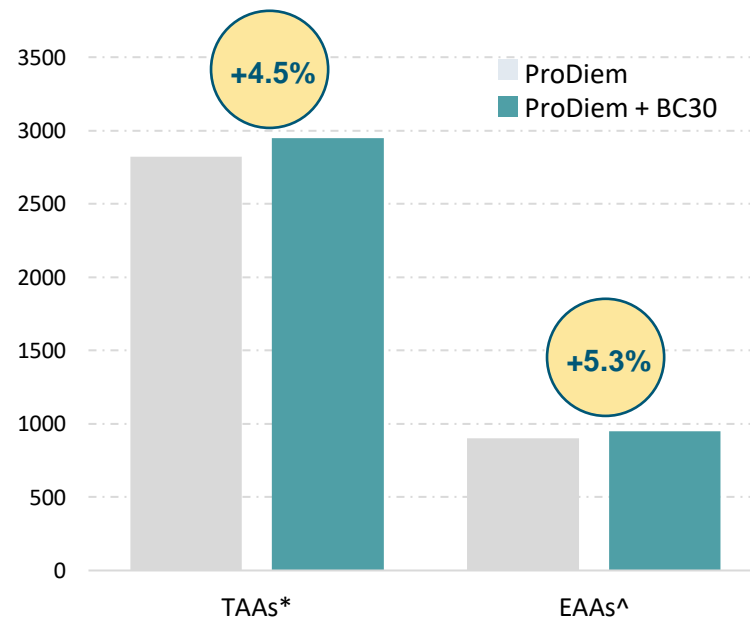


BC30 and effect on max concentration of amino acids (C_{Max})

Results

Consuming BC30 **significantly*** increased the C_{Max} of **total amino acids (TAAs)** in the blood.

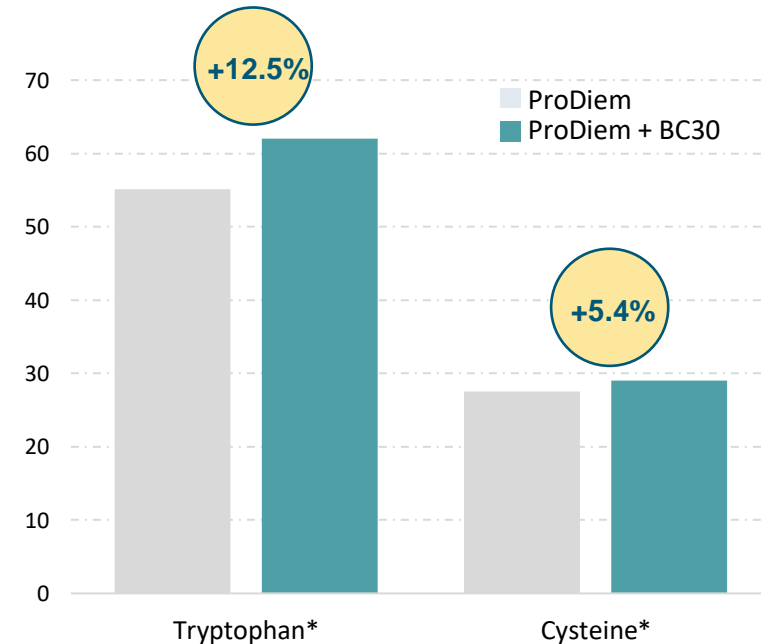
Consuming BC30 tended[^] to increase the total amount of essential amino acids (EAAs) and branched chain amino acids (BCAAs) absorbed into the blood.



Results

Consuming BC30 **significantly*** increased the C_{Max} of **2 individual amino acids** absorbed in the blood: cysteine and tryptophan.

Consuming BC30 tended[^] to increase the C_{Max} of 3 add'l amino acids: alanine, lysine, and proline.



Instant Plant Protein Oat Coffee with Cultures

A super foamy, premium tasting oat coffee that delivers a boost of plant proteins, fibers, caffeine and **live probiotic cultures** in a convenient powdered format.

Consumers are looking for **plant protein** in their daily food and beverages products. Today 30% of consumers are interested in protein fortified coffee.

Claims

- High in protein
- High in fibre
- Contains cultures (1B CFU per 300ml serving)

Other possible claims

- Fat free
- Low sugar
- Vegan & Gluten free
- Natural caffeine (120mg per 300mL serving)

*Can use the term "probiotic" in Italy, Spain, and more. Seek more specific guidance from your internal Regulatory team.

Nutritional Facts per 100mL (10g powder)

Calories	Fat	Carbs	Sugar	Protein	Fiber
29Kcal	0.4g	4.8g	0.8g	1.5g	0.9g

Dilute 30g powder in water up to 300mL hot water, shake it well for improved foaming

Featured Kerry technologies

Kerry Prodiem™ PSF

A pea and sunflower protein solution for plant protein fortification with great taste and texture.

Kerry Hyfoama PRO

A pea protein solution that exhibits whipping performance to bring authentic barista texture experience.

BC30™ Probiotic

Clinical studies support its ability to provide **digestive, immune, and protein absorption** benefits.

Kerry Crystals

Natural green coffee bean flavouring as source of natural caffeine.
Cold brew coffee powder for authentic premium coffee taste.

*Additional Kerry technologies also included to complete concept



Kerry Prodiem™

Kerry Hyfoama™

Kerry Tastesense™

Key Takeaways

We are in the midst of a consumer revolution driving both health needs and sustainability

Consumers do their own research on branded ingredients and health benefits

A combination of 'Hero and Halo' ingredients can be a winning strategy

Immune and Digestive Health are among the top 5 health benefits

Science and Technology assets drive unique science-backed value propositions

Wellmune and BC30 are powerful examples of ingredients that communicate health benefits on pack

We bring the voice of science to some of the most challenging questions in the food and beverage industry through our network of over 1000 Kerry scientists, external collaborators, and our Scientific Advisory Council.

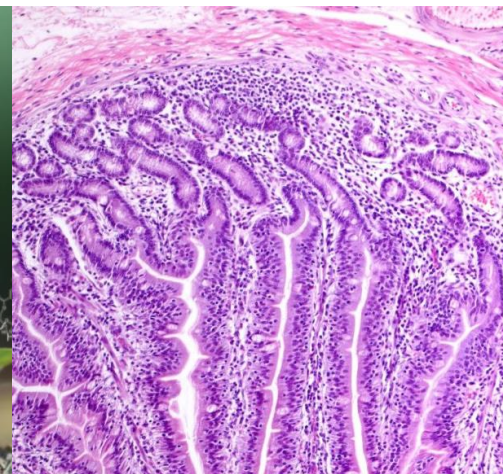
Our content comes straight from scientists and experts in nutrition, taste, food, and sensory sciences to make sure we are providing up-to-date, credible information to guide people shaping the future of food.

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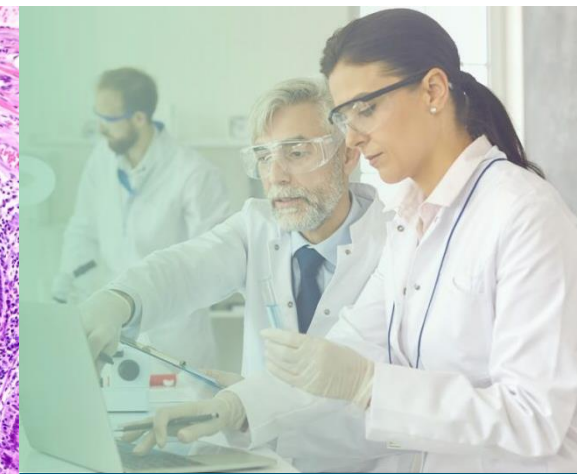
Ten Key Health and Nutrition Trends 2023

The science and innovation driving our industry forward



Microbiome: Beyond Digestive Health

An in-depth guide to the effects of the microbiome on areas like mood, dental health, or skin health



Postbiotics for Health

*What are they and how are they different from other –biotics?
By Tri Duong, PhD and Sara Llamas-Moya, PhD*



KERRY



**EXPANDING
HORIZONS**

THANK YOU