



The UK market is a good point of comparison to see how Cholesterol Lowering products have developed and what is popular with the target consumer. As evidenced by the UK also having a high prevalence of high cholesterol in their population – 20% diagnosed.

Why compare with the UK market?

- The UK has a similar profile to Australia & NZ in terms of the prevalence of Cholesterol, if not slightly lower (20% of adults 18+yrs have diagnosed high cholesterol** compared to 33% of adults 18+yrs having diagnosed high cholesterol***)

	 UK Cholesterol Patient Population - Prevalence****			 AUSTRALIA Cholesterol Patient Population – Prevalence* **		
Population*	Total Population (18+yrs)	Average Pop Incidence (% Adult Population)	% Cholesterol Patient Group	Total Population (18+yrs)	Average Pop Incidence (% Adult Population)	% Cholesterol Patient Group
Total Population (18+yrs)	50,000,000			17,896,525		
Total Cholesterol (18+yrs) Diagnosed+ Undiagnosed	19,300,000	39%	100%	9,154,522	51%	100%
A) DIAGNOSED	10,000,000	20%	52%	5,854,522	33%	64%
- At Risk/On Medication less than 3 years		0%	0%	2,855,864	16%	31%
- On Medication (3+yrs)	5,900,000	12%	31%	2,998,658	17%	33%
B) UNDIAGNOSED	9,300,000	19%	48%	3,300,000	18%	36%

Sources:

*UK Kantar World Panel Data – 2014, 2015

**World Health Organisation Report - 2014

***ABS & Heart Foundation - 2012, 2014

Benecol is the leading Cholesterol Lowering brand across food categories.
Benecol launched the Drinking Yoghurt Shot in 2004 (margarine spreads in 1998) - the first product to contain a single daily serve of 2g phytosterols. 2-3g per day being the recommended daily amount to consume for effect on cholesterol.



- Benecol is one of the leading brands, globally, that offers Cholesterol Lowering Foods fortified with phytosterols.
- Benecol is the category leader in Cholesterol Lowering Foods in the UK – with it's Drinking Yoghurt Shot format becoming the hero of it's range
- The Drinking Yoghurt Shot is the only product to contain 2g of Plant Sterol per serve/product.
- The other product formats (margarine & yoghurt) contain 0.8g per serve.

Benecol Proven to lower cholesterol

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Getting the right amount

Get the proven cholesterol lowering results. Benecol® foods are included everywhere you like any other spread, yogurt, or yogurt drink. To make sure you get the right amount of plant sterols to achieve the proven cholesterol lowering results, you could choose one bottle of Benecol® yogurt drink or 2-3 servings of any of the Benecol® spreads and yogurt every day.

1-a-day OR **2-3-a-day**

Enjoy one bottle of Benecol® yogurt or daily drink daily.

Enjoy 2-3 servings of Benecol® spreads and yogurt daily.

What is 1 serving?

One of Benecol® yogurt = 1 serving

One of Benecol® spread = 1 serving

There are so many delicious ways to enjoy the benefits of Benecol® foods. Find out more about our [food range](#) and [tasty recipe ideas](#) here.

Whether you go for a mixture of choices or stick to one product from the range, it's important to enjoy Benecol® foods every day – because when you stop, your cholesterol may increase to a higher level.

Please note Benecol® Foods are not intended for people who do not need to control their blood cholesterol. Benecol® Foods may not be suitable for pregnant and breastfeeding women, and children under 5 years. If you take cholesterol-lowering medication, seek your doctor's advice. Do not use more than 1g of plant sterols per day. High cholesterol is a risk factor in the development of heart disease. As heart disease has multiple risk factors you may need to change more than one to reduce overall risk.

Enjoy Benecol® foods as part of a healthy diet and lifestyle.

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Strawberry Single Bottle

Pack size: 67.5g bottle

Ingredients: Yogurt (90%) (skimmed milk, Plant Sterol Ester (of which plant sterol is 3% of total drink), yogurt cultures (milk), fructose, vitamin B6, folic acid), Water, Blueberry puree (1.8%), Fructose, Lemon juice (from concentrate), Stabiliser (pectin), Flavouring, Sweetener (sucralose).

*Cholesterol Foods are not intended for people who do not need to control their blood cholesterol.

Nutrition information	per 100g	per bottle (67.5g)
Plant Sterol	3g	2g
Energy	214kJ/51kcal	145kJ/35kcal
Protein	2.8g	1.9g
Carbohydrate of which are sugar	5.7g 3.9g	3.7g 3.5g
Fat of which are saturated	1.9g 0.1g	1.3g 0.1g
Fibre	0.3g	0.2g
Salt	Trace	Trace
Vitamin B6	0.85mg (61%NRV)	0.6mg (43%NRV)
Folic Acid	85µg (43%NRV)	60µg (30%NRV)

%RI serving

A 67.5g bottle provides an adult's guideline daily amount

	Carbs	Sugars	Fat	Saturated	Salt
Per bottle of 67.5g	44%	56%	30%	10%	1%

Plant Sterol 2g

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Summer Fruits

Pack size: Mixed pack of 4 x 120g pots

Suitable for: Vegetarians

Ingredients: Yogurt (37%) (skimmed milk, sugar, cream, skimmed milk powder, Plant Sterol Ester (of which plant sterol is 0.65% of total product), yogurt cultures (from milk), Strawberry (3%), Sugar, Stabilisers (modified maize starch, pectin), Lemon juice (from concentrate), Colour (anthocyanins), Flavouring

%RI serving

A 120g pot provides an adult's guideline daily amount

	Energy	Fat	Saturated	Sugars	Salt
Per pot of 120g	156kJ/37kcal	3.7g	1.5g	14.5g	0.1g

Or an adult's reference intake. Typical values per 100g Energy 267kJ/63kcal

Nutrition information	per 100g	per serving (120g)
Energy	567kJ/58kcal	423kJ/101kcal
Fat of which are saturated	1.7g 0.3g	2.1g 1.0g
Carbohydrate of which are sugar	13.6g 12.5g	16.3g 15.0g
Fibre	0.18g	0.18g
Protein	3.7g	4.4g
Salt	0.13g	0.16g
Plant Sterol	0.7g	0.8g

Plant Sterol 0.8g

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Light

Pack size: 200g

Ingredients: Water, Rapeseed oil, Plant Sterol Ester (3g/100g), Palm oil, Gellan, Coconut oil, Salt, Emulsifiers (mono and diglycerides of fatty acids, E471), Vitex powder (milk), Preservatives (potassium sorbate, Flavouring, Acidity regulator (citric acid), Colour (carotenes), Vitamin A, Vitamin D3. Equivalent to plant sterols 2.3g/100g

*Cholesterol Foods are not intended for people who do not need to control their blood cholesterol.

Nutrition information	per 100g	per serving (150g)
Energy	1540kJ/320kcal	154kJ/32kcal
Fat of which are saturated	35g 8.5g	5.6g 0.7g
Carbohydrate of which are sugars	0.4g 0.4g	Trace Trace
Protein	2.3g	0.3g
Salt	1.0g	0.1g
Vitamin E	5mg (87%NR)	0.5mg (7%NR)
Vitamin A	900µg (115%NR)	90µg (11%NR)
Vitamin D3	7.8µg (160%NR)	0.76µg (16%NR)

Source: Benecol UK website <http://www.benecol.co.uk/>

Household Penetration data confirms that the Cholesterol Lowering food segment in the UK is well-developed*
As evidenced by 17.6% household penetration across the 3 food categories.
The conversion to cholesterol lowering foods offered in regular food categories is highest in the single-serve drinking yoghurt shot category
– the only product that has 2g of plant phytosterols per serve. Evidence of the higher rate of conversion can be seen by in the data below.

UK Household Penetration & Purchasing of Cholesterol Lowering Products*

- Total all Cholesterol Lowering products in the 3 food categories
 - Household Purchase Penetration = 17.6%
 - Assuming that there is no duplication of the categories being purchased, and thereby potential to be purchased by fewer households
- Evidence of the higher rate of conversion to single-serve plant sterol products can be seen by:
 - Cholesterol Lowering Spreads (0.8g plant sterols per serve) = 10% conversion (9.5% cholesterol lowering segment penetration within the total category that has 98.6% penetration)
 - Cholesterol Lowering Yoghurts (0.8g plant sterols per serve) = 2% conversion (1.9% cholesterol lowering segment penetration within the total category that has 90.3% penetration)
 - Cholesterol Lowering Drinking Yoghurt Shots (2g plant sterols per serve) = 20% conversion (6.2% cholesterol lowering segment penetration within the total category that has 31% penetration)**
- Note that the conversion assumption made is that the households that are purchasing cholesterol lowering products have a diagnosed cholesterol condition they are trying to manage, as the health profile of the Kantar shopper panel is unknown.



UK FOOD CATEGORIES WITH CHOLESTEROL LOWERING PRODUCTS HOUSEHOLD PENETRATION

Category	Household penetration 52 w/e data, 29 March 2015
	Annual 2015
Total Cholesterol Lowering Market 3 Cholesterol Lowering Segments	17.6
Yellow Fats /Margarines	
Total Market	Category Average: 98.6%
Category Average	Category Leader (Lurpak): 31.4%
Cholesterol Lowering Segment	Category Average: 9.5%
Category Leader for Yellow fats	CL leader (FPA): 8.0%
Benecol spread brand	Benecol: 3.5%
Yoghurts	
Total Market:	Category Average: 90.5%
Category Average	Leader for Yoghurts (Activia): 38.0%
Cholesterol Lowering Segment	Category Average: 1.9%
Category Leader for yoghurts	CL leader (Benecol): 1.8%
Drinking Yoghurt Shots	
Total Market:	Category Average: 31.0%
Category Average	Category Leader (Actimel): 14.5%
Cholesterol Lowering Segment	Category Average: 6.2%
Category Leader	CL leader (Benecol): 3.2%

Source: *UK Kantar World Panel Data – 2014, 2015

Benecol Drinking Yoghurt Shots (single serve 2g plant sterol) are purchased at a far higher frequency than the other Benecol food items (0.8g plant sterol per serve). Further evidence of the consumer adoption behaviour and preference for this single serve format with 2g of phytosterols in each consumption occasion.

UK Household Penetration & Purchasing of Cholesterol Lowering Products*

- The frequency and quantity of Benecol Drinking Yoghurt shots is greater than the other 2 product formats, approximately double. As evidenced by the shots being purchased 11.6 times p.a., the yoghurt 7.1 times p.a., and the spread 6.1 times p.a.
- This is evidence to suggest people prefer to purchase 2g/serve products rather than products that require them to consume multiple servings per day. It may also indicate people's desire to seek phytosterols in products other than margarines.



CATEGORIES WITH CHOLESTEROL LOWERING PRODUCTS & KEY BRAND QUANTITY AND FREQUENCY OF PURCHASE

Category	Frequency of Purchase 52 w/e data. 29 March 2015	Quantity - Average Weight of Purchase (AWOP - Volume) 52 w/e data. 29 March 2015
	Total	Total
Yellow Fats /Margarines	22.8	15.3
Category Average (Lurpak)	8.6	6.1
Category Leader for Yellow fats (FPA)	7.9	3.6
Benecol spread brand	6.1	3.4
Yoghurts	27.1	24.2
Category Average (Activia)	8.2	7.1
Benecol yoghurt brand	7.1	5.8
Liquid Shots	10.5	10.7
Category Average (Actimel)	8.4	12.1
Benecol Shot brand	11.6	8.38

Source: *UK Kantar World Panel Data – 2014, 2015

Benecol is the leading Cholesterol Lowering brand in the Cholesterol Lowering Drinking Yoghurt Shot category (60% of the segment value at £57.2mill and 51% volume at 17.6mill packs)
Benecol Cholesterol Lowering Drinking Yoghurt Shots are also in strong growth year on year. As evidenced by the sales value and volume growth of +15% and +13% respectively. Demonstrating consumer demand for an easy way to access the 2g per serve rather than having multiple portions

UK Sales - Value & Volume of Cholesterol Lowering Drinking Yoghurt Shots*

- **VALUE** - Cholesterol Lowering Yoghurt Shots is worth £94.9m (Benecol = £57.2m of this) – 36% of the total drinking yoghurt shot category
- **VOLUME** - Cholesterol Lowering Yoghurt Shots also have high volume of packs being bought every year – 34.4million (Benecol = 17.6m)
- **HIGHER PURCHASING LOYALTY** - Frequency and Amount purchase per buyer is higher for Cholesterol Lowering Drinking Yoghurt Shots than the other types of shots



Source: *UK Kantar World Panel Data – 2014, 2015

DRINKING YOGHURT SHOT CATEGORY

VALUE & VOLUME SIZE & KEY PURCHASE DYNAMICS

Measure 52 w/e 26 Apr 15	Total Healthy Yoghurt Drinks Shots	Total Probiotic Liquid Shots	Total Cholesterol Lowering Shots	Total BENECOL CL Yoghurt Shots
Spend (£000)	£260.8m	£165.9	£94.9m	£57.2m (+15%)
Packs (000s)	113.8m	79.4m	34.4m	17.6m (+13%)
Penetration (total % Households)	25.92%	22.62%	6.14%	3.0% (-11%)
Frequency (Occasions)	11 trips	9.2 trips	13.42 trips	12.2 trips (+23%)
Spend per Buyer (£ - total annual)	£37.72	£27.50	£57.96	£70.57 (+28%)
Volume per Buyer (packs - total annual)	16.45	13.17	20.98	