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*Bavoy Healthyhearth soy breads look beyond carbs to long-term health benefits, but at a cost.*

*By Hollis Ashman and Jacqueline Beckley, Consumer Understanding Editors*

Soy bread--something of an oxymoron? Whether it's primarily soy, protein or bread, all three have lots of opportunity.

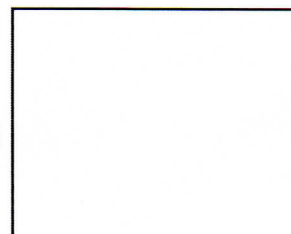
Soy has a nutritional health claim approved by the FDA: "Eating 25 grams of soy a day or more can be good for the heart by lowering cholesterol levels." Protein has a strong link to Atkins and other low-carb diets. But how do you deal with those carbohydrate cravings? Wouldn't it be great to satisfy them with bread, one of the original comfort foods?

With 98 percent of households purchasing fresh bread (Bakingbusiness.com, July 1, 2002), can increased usage be driven through creation of protein-based breads? Does bread always have to be carbohydrate-based? The hurdle for an acceptable soy bread has been to understand how to use soy flour to enrich the protein content of bread while minimizing its beany aftertaste, a feat that's eluded the industry until recently.

## **Understanding the marketplace**

Breads have a market size of \$6 billion, with the artisan bread category a \$75-million to \$150-million business in the U.S. and growing (at least until recently) at 20 percent annually (Bakingbusiness.com 2002). Artisan bread is about "the integrity of the ingredients, the process and the ultimate superior quality that is produced," according to Peter Franklin, chairman of the Bread Bakers Guild of America. Breads enable consumers to supplement their choices for the center of the plate and enhance their flavor selections of spreads, meats, cheeses, etc.

Bread historically has been bland in flavor and chewy in texture. You squeezed the loaf to see if it was fresh. Artisan breads that reflect more ethnic sensibilities have focused on different textures and greater textural difference between the crust and the bread along with stronger flavors



through the use of different ingredients.

For bread overall at retail, private label holds 27 percent of the market, Wonder has 6 percent, Pepperidge Farm 5 percent, Oroweat Super Premium 4.5 percent, and Nature's Own is at 4 percent, according to 2003 figures from Information Resources Inc. However, with the low-carb craze, consumption per capita declined 1.4 percent nationwide, and in California the drop was 4.6 percent, also according to IRI in 2004. Consumption of wheat flour per capita fell to 137 pounds in 2003 from 147 pounds in 1997, says the North American Millers Assn.

So if you are a baker, where do you look for growth or even survival? The low-carb craze has spawned a mini industry of low-carbohydrate products. The full impact of Atkins has yet to be seen (although at the time of this writing it was thought to be waning) but it has many companies losing market share and developing new products with no consumer input -- just to get something out there.

To survive in this category, you need to focus your products on longer-term, sustainable trends like health, portion control and good taste. Soy bread, which just began appearing earlier this year, is not a blurring of categories but a completely new animal. Healthyhearth soy breads from Bavoy Inc., Columbus, Ohio, are focused on health via the growing awareness of soy, not on the trendy low-carb craze, although they are slightly lower in carbs and do not use refined flours, as do most breads.

## Insights

With Healthyhearth Multigrain Soy Bread, Bavoy is trying to meet the needs of consumers looking for healthy foods, and especially those who appreciate the health benefits of soy. Bavoy is seeking to shift the paradigm in the definition of bread to that of a protein-based product but still a comforting and healthy one.

While many bread manufacturers have attempted low-carb breads, few have tried to produce soy breads, and none that we know of has put enough soy into the bread to make the health



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claim. Others in this soy bread category are Nature's Own (4.35g of soy) and Vogel's Soy & Flaxseed bread (little soy but the Omega-3 fats of flaxseed). Soy breads are typically fairly expensive, costing on the order of \$3 to \$6, though similar to artisan breads in the grocery store.

The idea of getting enough soy in your bread product to achieve the health claim is great. However, just like Benecol in the margarine category, the food must fit within the pricing structure and the expected taste and texture profiles of the category or the consumer is confused.

The key attributes for bread are aroma, taste, thirst and texture. Aroma is closely linked with memory. Consumers are looking for a familiar experience to enhance their center-of-the-plate meal. Bread is consumed at dinner, lunch and breakfast as part of a meal for most Americans.

Key trends that can impact this idea are ethnicity, healthfulness and blurring of standards of identity.

**Ethnicity:** The U.S. is now the great salad bowl instead of the melting pot. We are a very diverse country, and this drives acceptance and interest in diverse food stuffs, including breads that once were considered peasant breads. This allows soy bread to be within the consideration set of breads.

**Healthfulness:** Bread has the halo of familiarity. For those on the low-carb diet, however, it is no longer within the consideration set of foods they will eat. Health claims for higher fiber and soy may enable breads to come back to the table for these consumers.

**Standards of identity:** Standards were the driver for the creation of the FDA in the 1920s. The agency helped protect consumers from predatory manufacturers that created products that were not what they said they were. Consumers today trust manufacturers to deliver good foods. This level of trust enables consumers to accept a blurring of the standards of identity.

### **The experience**

Healthyhearth Multigrain Soy Bread is available in three flavors in a 2-lb. loaf for \$3.39. The

package shows graphics that reflect the tradition and healthfulness of handmade bread. The materials are familiar bread packaging.

Aroma, taste and texture are critical to the perception of freshness in bread. The consumer typically squeezes the bread to ensure it is fresh. Healthyhearth Soy Bread is a very dense, moist bread (more on the order of a coffeecake-type texture) and so does not squeeze in your hand at all. The cues that are given to the consumer are of staleness.

The bread has a slightly strong flavor, and its density fills you up quickly. Since the bread is so dense, it is quite heavy when you pick up a loaf. Each slice contains 6.5 grams of soy , enough to make the soy health claim. As a comfort food, this is not what is expected and so is not familiar. Given its ingredient mix, it does appear to have a very long shelf life when held at room temperature.

### **Does the product deliver?**

Bavoy has focused on innovation in soy as a grain for bread. The beany flavor is still there, but it's lower and toward the end of the chew as almost a nutty note.

The brand is new and so only has what is presented on the shelf to help it break through the clutter of other breads. The presentation is the same as what has always been on shelf, and so does not stand out at all. It is being presented as bread, not packaged in a way that signals its specialness or its understanding of the behaviors of its core users.

The product is dense with a slightly strong flavor. It goes with various bread toppings, but one slice is enough to feel full. Its moistness makes it acceptable to chew. Another flavor variety with raisins comes across as a little sweeter, and some of our tasters thought it would work well as french toast.

### **How to make it bigger**

This product is competing with other artisan breads and other low-carb choices. The artisan breads have lots of flavor, but tend to have a stronger difference in texture between the crust and bread. The low-carb choices in the bread area are transitory: When low-carb as a fad is over, they will have no reason for being. A soy bread could have more staying power.

Repeat with this product will be driven by the trade-off of the price, value proposition versus the experience and healthfulness of the product. Value is a complex idea to measure. For some, it will be about the quantity of product, for some the ability just to get a soy-based bread, for others it involves the flavor and texture experience.

Alternative products surround Healthyhearth Soy Bread. In the long run, the measure of this product's success will be how close to a widely accepted familiar bread (not necessarily white bread) it can be and how much soy protein the product delivers.

**Rating:** This is different. The product has the benefit of soy and fits with the consumer's normal bread consumption behavior. Its flavor profile and density of texture deliver the quality of artisan bread, such that the consumer will not eat it casually or easily as a snack. The product also delivers on the soy levels required for the health claim. It has a reason for being. It is acceptable enough in flavor and texture to meet the needs of people looking for the soy benefit. This trend is sustainable. Low-carb as a trend is much less so. However, if the consumer is looking only for bread, there are many other choices.

**Market Potential:** Maybe. This will take time to develop. Interest in the benefits of soy will need to grow to keep this product compelling.