Ajinomoto Global SALTS (Sodium Alternatives and Long-Term Solutions) Survey

Brazil Report

Eat Well, Live Well.

AJINOMOTO

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RESEARCH OBJECTIVES

The objectives of this study are to understand consumers attitudes toward sodium in key global markets and identify the types of interventions companies and governments could use to reduce sodium consumption overall. Specifically, we will:

- Determine the importance of a low-sodium diet to consumers, especially relative to their other food and health concerns;
- Explore consumers' understanding of where sodium comes from in their diets (e.g., processed foods, seasonings, etc.) and if/where misperceptions exists;
- Understand if and how consumers are currently trying to reduce their sodium intake and how effective they believe these strategies are; and,
- Identify nudges and interventions that could be successfully used to decrease sodium intake in each market.

METHODOLOGY

- 15-minute online survey conducted between August 31 – September 22, 2021

Audience	N-Size	Margin of Error
7-Country Total	N=7,090	+/- 1.2%
Americas (US & BR)	N=2,026	+/- 2.2%
Europe (UK & FR)	N=2,028	+/- 2.2%
Asia (JP, ID, & TH)	N=3,036	+/- 1.8%
United States	N=1,000	
United Kingdom	N=1,022	
France	N=1,006	
Japan	N=1,000	+/- 3.1%
Indonesia	N=1,015	
Thailand	N=1,021	
Brazil	N=1,026	

- Conducted in English, French, Brazilian Portuguese, Japanese and Thai. English was localized for UK and Indonesia.
- Includes behavioral science component, using natural language processing to analyze open-ended responses and incorporating Nudge Theory to understand how effective different interventions might be in encouraging sodium behavior change in each market.

EXECUTIVE SUMMARY

KEY FINDINGS

1 Taste and shelf life are top factors in deciding what to eat for Brazilian consumers, followed by health/nutritional value. There is also a strong desire for more affordable healthy food options. Although consumers are more positive toward low-sodium food with many saying it is flavorful and exciting compared to the 7-country total, most Brazilians consider low sodium-foods bland, expensive and hard to find – suggesting this is a perception that may need to be addressed.

2 Most consumers believe that eating too much sodium is bad for their health, and compared to the 7-country total, Brazilian consumers have greater control over sodium intake, and more are seeking low-sodium options. Consumers are also more concerned about sodium consumption compared to other markets, yet most are either unaware or misinformed regarding sodium intake guidelines, with many assuming their own consumption aligns with recommendations.

3 Even though Brazilians are more likely than other markets to be actively seeking low-sodium options, reducing sodium intake is less of a priority. Although consumers understand the benefits of reducing sodium, there is still a desire for more information - 3 in 5 say they wish they had more information on how to easily reduce sodium intake regardless of a personal or family health diagnosis. This suggests consumer education along with tactical recommendations would be beneficial in the market.

4 When it comes to reducing sodium intake, the most impactful interventions globally are also most impactful for Brazilian consumers - preferred grocery stores no longer carrying high-sodium options and governments reducing intake recommendations. However, successfully driving sodium reduction will require a mix of interventions that span government, food and beverage companies, news media and consumer education.

DETAILED FINDINGS

BRAZIL SODIUM PERCEPTIONS

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KEY TAKEAWAY

Taste and shelf life are top factors in deciding what to eat for Brazilian consumers, followed by health/nutritional value. There is also a strong desire for more affordable healthy food options. Although consumers are more positive toward low-sodium food with many saying it is flavorful and exciting compared to the 7-country total, most Brazilians consider low-sodium foods bland, expensive and hard to find – suggesting this is a perception that may need to be addressed.

Nearly 9 in 10 Brazilians say taste and shelf life are top factors in deciding what to eat, followed by health/nutritional value.

3 in 4 consumers also consider cost and storage/refrigeration important. These top factors in deciding what to eat are on par with the 7-country total.

Top Factors in Deciding What to Eat

(Top 2 Box Important, Top 5 Responses Ranked)

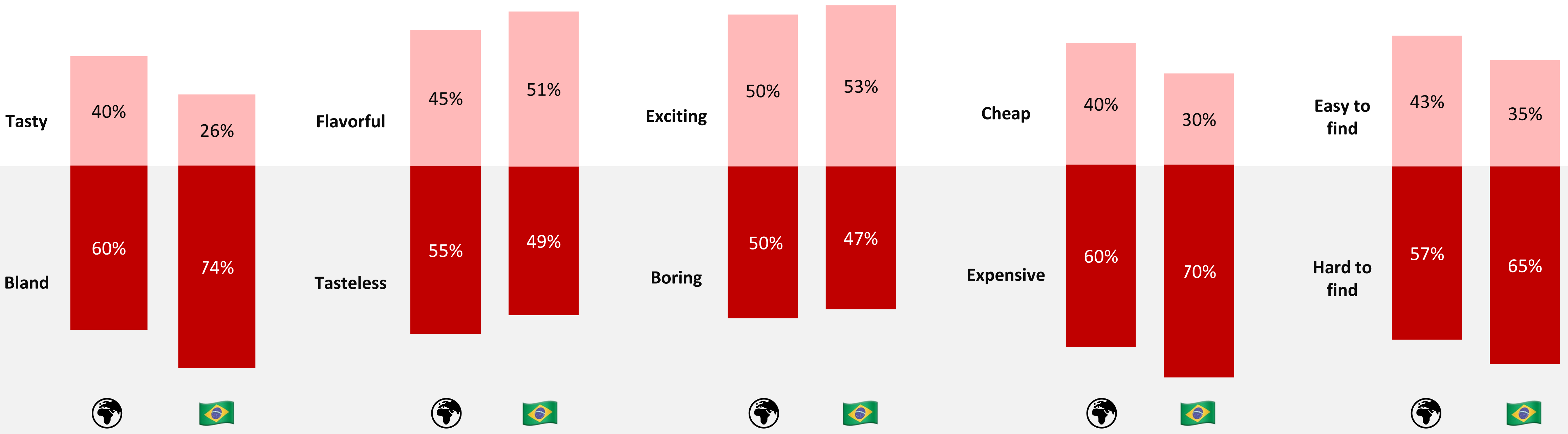
7-Country Total	Brazil
83% Taste	**89%** Taste
67% Health/nutritional value	**87%** Shelf life/how long food lasts
63% Cost/price	**79%** Health/nutritional value
62% Shelf life/how long it lasts	**76%** Cost/price
55% Storage/refrigeration	**75%** Storage/ refrigeration

Q2. When thinking about the food and beverages you and your family consume, please rate how important each of the following is when deciding what to eat: (7-Country Total n=7,090, Brazil n=1,026)

Brazilians have mixed perceptions when it comes to low-sodium foods – most say they are bland, expensive and hard to find. However, half believe they are flavorful and exciting.

Perceptions of Low-Sodium Foods
(% Selected Response, Respondents Asked to Select One Response Per Pairing)

Low-sodium food is…



Q11. Low-sodium foods are: Select one response per row. (7-Country Total n=7,090, Brazil n=1,026)

Like the 7-country total, there is a call for more affordable healthy food options in Brazil, especially among older consumers.

Most are also seeking out the freshest products they can find and are currently buying products their family loves.

90%

Of Brazil Boomers say that they wish healthier food options were a more affordable price

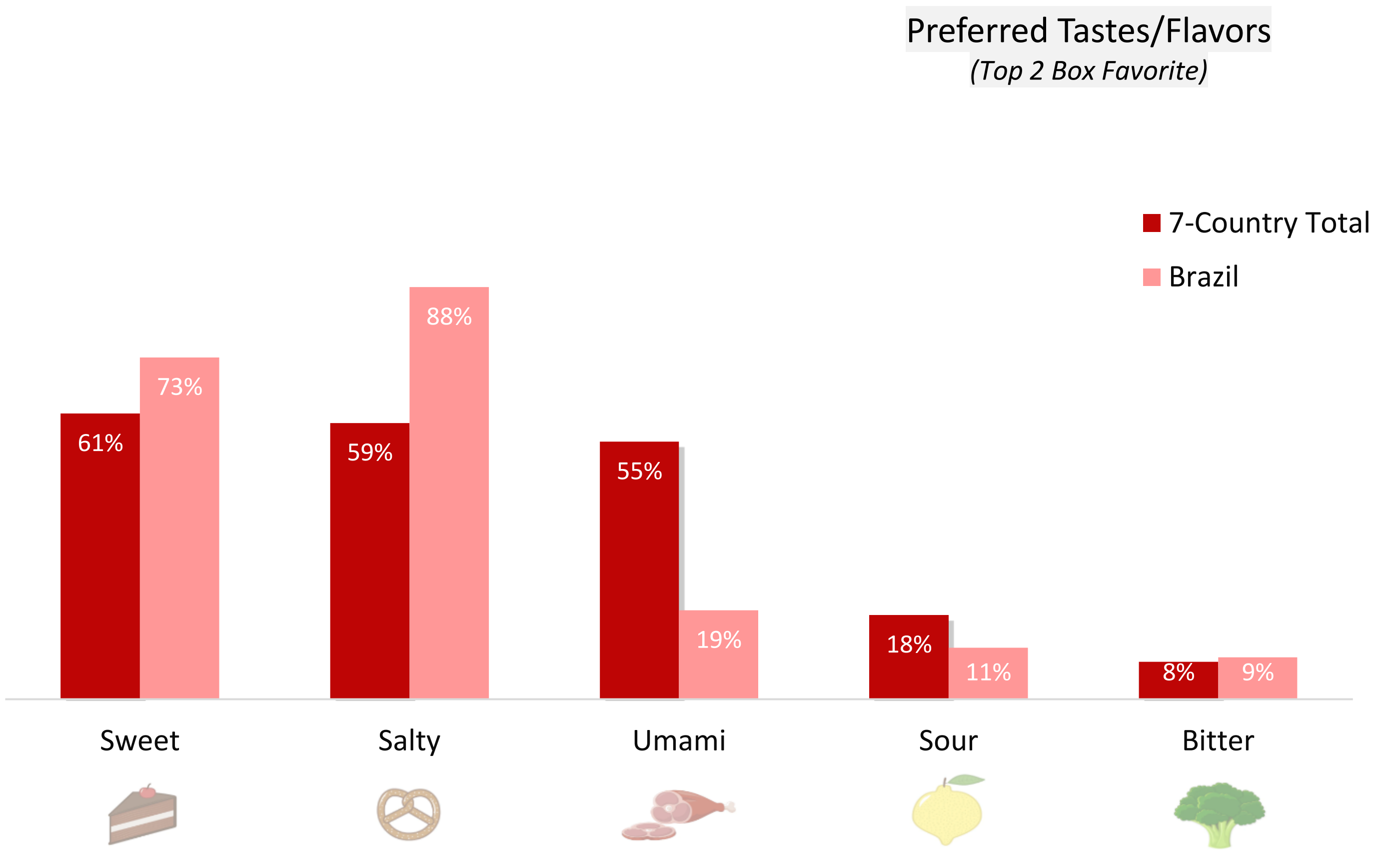
Deciding What to Eat: Statement Agreement

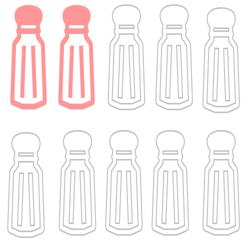
(Top 2 Box Agree, Top 3 Responses)

7-Country Total	Brazil
68% I wish healthier foods were more affordable	**85%** I wish healthier foods were more affordable
65% I buy products my family loves	**79%** I actively seek out the freshest products
64% I actively seek out the freshest products	**71%** I buy products my family loves

Q3. When picking food for yourself or your family, please rate how much you agree or disagree with the following statements: (7-Country Total n=7,090, Brazil n=1,026)

Nearly 9 in 10 Brazilians say salty is their most preferred flavor followed by sweet, while less than 2 in 10 say the same about umami, sour and bitter flavors.





27%

Of Brazil Boomers say that Umami is their preferred taste or flavor

Q6. Which of the following is your preferred taste or flavor? Please rank in order of most favorite (1) to least favorite (5). (7-Country Total n=7,090, Brazil n=1,026)

Key Generational Nuances (Brazil)

Top Factors for What to Eat

- Taste is the top factor for most age groups; however, Boomers prioritize shelf life more than anything.
- Like Boomers and shelf life, older age groups are more likely to say storage/refrigeration is important.
- Older age groups - Millennials, Gen X and Boomers - are more likely than Gen Z to prioritize health/nutritional value.
- Older consumers are also more likely to say cost is important compared to Gen Z.

Perceptions of Low-Sodium Foods

- All age groups are likely to perceive low-sodium foods as bland, expensive and hard to find.
- Millennials and Boomers are slightly more likely to say low-sodium foods are flavorful, while Gen Z, Gen X and Silent/Greatest are more likely to say tasteless.
- Younger consumers – Gen Z and Millennials – are slightly more likely to believe low-sodium foods are exciting compared to older generations who say low-sodium foods are boring.

Desires for Healthy Foods

- Nearly all age groups wish healthier foods were more affordable, except for the Silent/Greatest generation who say they only choose products with no artificial preservatives.
- Millennials, Gen X, and Boomers are more likely than Gen Z to select food that will improve their health, seek out the freshest products, specifically look for foods with simple ingredients and only choose products with no artificial preservatives, colors or flavors.

Preferred Flavors

- Salty is the most preferred flavor across age groups.
- Younger generations – Gen Z and Millennials – are more likely to prefer salty and sweet.
- Older consumers are more likely to prefer umami and bitter flavors.

Age Breakdowns: Gen Z (18-24), Millennial (25-40), Gen X (41-56), Boomer (57-75), Silent/Greatest (76+)

Brazil n=1,026, Gen Z n=207, Millennials n=345, Gen X n=264, Boomers n=205, Silent/Greatest n=5) *Indicates small sample size, findings should be considered directional only.*

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KEY TAKEAWAY

Most consumers believe that eating too much sodium is bad for their health, and compared to the 7-country total, Brazilian consumers have greater control over sodium intake, and more are seeking low-sodium options. Consumers are also more concerned about sodium consumption compared to other markets, yet most are either unaware or misinformed regarding sodium intake guidelines, with many assuming their own consumption aligns with recommendations.

The amount of sodium is a higher priority for Brazilians compared to the 7-country total with more than 6 in 10 saying it's important to consider; however, it still ranks behind fruit, protein and vegetables.

Top Factors in Considering What to Eat
(Top 2 Box Important)

	7-Country Total	Brazil
Priority #1:	**60%** Amount of vegetables	**77%** Amount of fruit
Priority #2:	**54%** Amount of protein	**74%** Amount of protein
Priority #3:	**54%** Amount of fruit	**69%** Amount of vegetables
Amount of sodium rank (out of 10):	#7 (47%)	#5 (63%)

Brazil consumers with a personal diagnosis rank the amount of sodium in their food as a slightly higher priority (#5) compared to those without a personal or family diagnosis (#6)

Note: 'Personal Diagnosis' reflects respondents that have been diagnosed by a medical professional with any of the following conditions: hypertension, heart disease, stroke, kidney disease/kidney stones, stomach cancer, or something else. 'Family Member Diagnosis' reflects respondents that currently live with a family member who has been diagnosed by a medical professional with any of the same conditions listed above.

Q4. When considering what to eat, how important is each of the following? (7-Country Total n=7,090, Brazil n=1,026)

Most are unaware or incorrectly identify the recommended amount of sodium according to WHO and national guidelines.

Recommended Amount (Guesses)
of **Sodium** Based on WHO and National Guidelines
(% Selected Response)

	WHO Guidelines	National Guidelines
	mg/day	mg/day
Recommended		
Less than 1,000	21%	20%
1,000-1,999	20%	21%
Above Recommended Amount* (2,000 or more)	24%	23%
Don't know / not sure	35%	36%

WHO guidelines suggest consuming a maximum of 2,000 mg of sodium per day. The Ministry of Health, ANVISA and Pan American Health Organization also recommend a maximum of 2,000 mg per day.

*Note: Above Recommended Amount is a net of the following response options: 2,000-5,999; 6,000-8,999; 9,000-10,999; 11,000-12,999; 13,000-14,999; 15,000 or more

Q14A/Q14B According to nutritional guidelines, what is the recommended amount of [IF US, IND, TH, BR: sodium] [IF UK, FR, JP: salt] an adult should consume in an average day? (Brazil n=1,026)

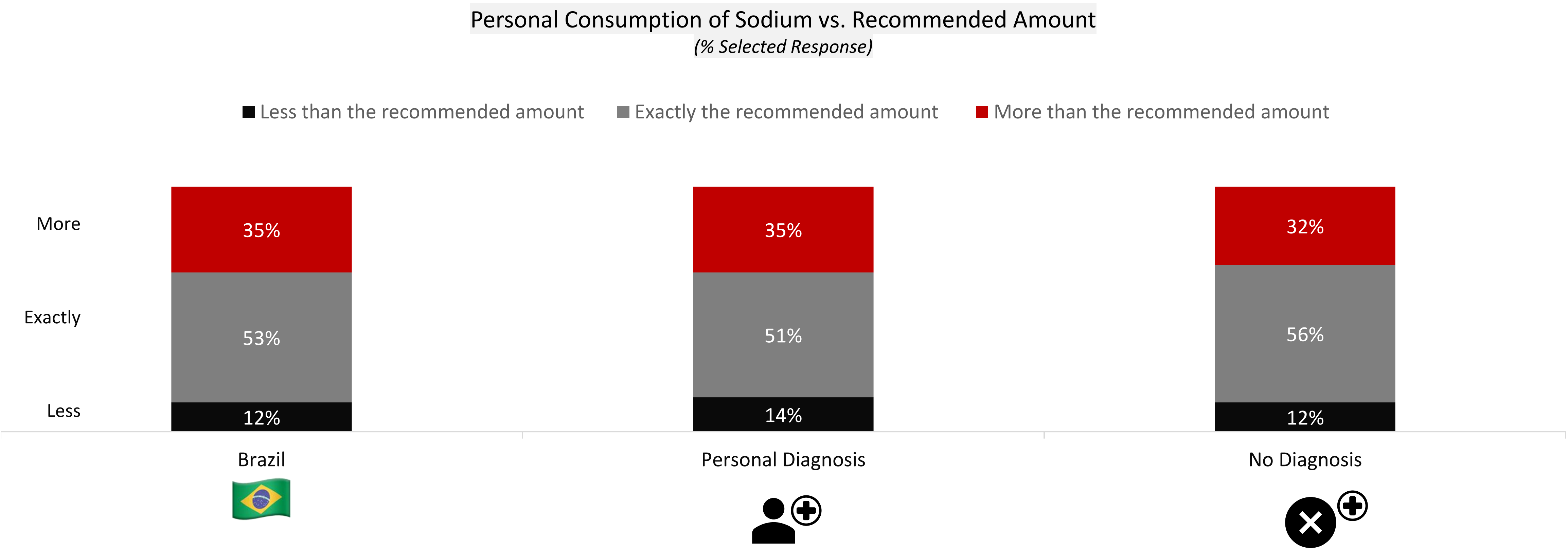
Like the 7-country total, most Brazilians assume they are consuming exactly the recommended amount.

However, slightly more than a third of Brazilians acknowledge they are currently consuming more than the recommended amount which is higher than the 7-country total.

Personal Consumption of Sodium vs. Recommended Amount
(% Selected Response)

Q12. In an average day, do you believe you consume more than, less than or the recommended amount of sodium? Your best guess is fine. (7-Country Total n=7,090, Brazil n=1,026)

Those with a personal diagnosis are on par with the market – most assume they are consuming exactly the right amount and even more without a personal diagnosis believe the same.



Note: 'Personal Diagnosis' reflects respondents that have been diagnosed by a medical professional with any of the following conditions: hypertension, heart disease, stroke, kidney disease/kidney stones, stomach cancer, or something else. 'Family Member Diagnosis' reflects respondents that currently live with a family member who has been diagnosed by a medical professional with any of the same conditions listed above.

Q12. In an average day, do you believe you consume more than, less than or the recommended amount of sodium? Your best guess is fine. (Brazil n=1,026, Personal Diagnosis n=354, No Diagnosis n=672)

Nearly 9 in 10 Brazilians believe eating too much sodium is bad for health and that intake is important to monitor at any age; and, compared to the 7-country total, more consumers say they control their sodium intake.

Personal Sodium Attitudes and Behaviors
(Top 2 Box True of me)

	7-Country Total	Brazil
Eating too much sodium is bad for your health	64%	86%
Sodium is important to monitor at any age	63%	86%
	vs.	vs.
I control how much sodium I consume	37%	54%
I look for food marked “low in salt” or “low sodium”	34%	54%

While all generations agree eating too much sodium is bad for your health, Gen Z is least likely to hold this belief compared to older age groups

Q9. For each of the following statements, please rate how true or untrue each is about you. (7-Country Total n=7,090, Brazil n=1,026).
Q15. Thinking about age and sodium consumption, please indicate how much you agree or disagree with the following statements: (7-Country Total n=7,090, Brazil n=1,026).

Key Generational Nuances (Brazil)

Top Factors in Considering What to Eat

- Across age groups, the amount of fruit tops the list of factors when considering what to eat.
- Boomers are more likely than younger consumers to say the amount of sodium is important, along with the amount of sugar.
- Older generations are more likely to say the type of protein (animal vs. plant) is important compared to Gen Z.
- The same is true for the amount of protein and vegetables – Gen Z is less likely than older consumers to say these factors are important.

Recommended Amount of Sodium

- Younger consumers are more likely than Gen X and Boomers to overestimate the recommended amount of sodium per national and WHO guidelines.
- Boomers are more likely than other age groups to say they are unaware of or don't know the recommended sodium intake per national or WHO guidelines.

Personal Sodium Consumption

- All age groups are likely to say they consume exactly the recommended amount.
- Boomers are more likely to say they consume less than the recommended amount of sodium compared to Gen Z and Millennials.

Sodium Attitudes/Behaviors

- Older consumers are more likely than Gen Z to agree that eating too much sodium is bad for health and is important to monitor at any age.
- Similarly, Gen Z is least likely to say they control their sodium intake, and least likely to look for food marked "low sodium" or "low in salt."

Age Breakdowns: Gen Z (18-24), Millennial (25-40), Gen X (41-56), Boomer (57-75), Silent/Greatest (76+)

Brazil n=1,026, Gen Z n=207, Millennials n=345, Gen X n=264, Boomers n=205, Silent/Greatest n=5) *Indicates small sample size, findings should be considered directional only.*

3

KEY TAKEAWAY

Even though Brazilians are more likely than other markets to be actively seeking low-sodium options, reducing sodium intake is less of a priority. Although consumers understand the benefits of reducing sodium, there is still a desire for more information - 3 in 5 say they wish they had more information on how to easily reduce sodium intake regardless of a personal or family health diagnosis. This suggests consumer education along with tactical recommendations would be beneficial in the market.

A NOTE ABOUT NATURAL LANGUAGE PROCESSING (NLP)

The following slides analyze the open-ended responses from consumers on:

1) Why they personally should monitor their sodium intake;

2) The perceived impacts (positive and negative) of reducing their sodium intake; and,

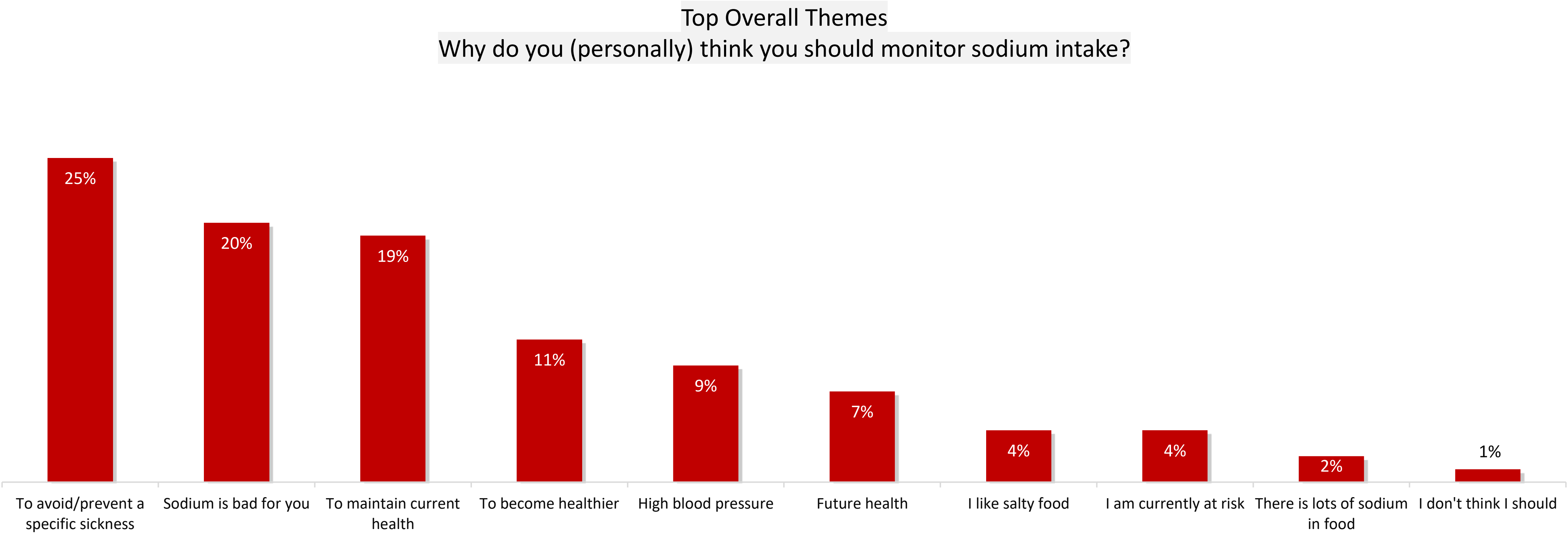
3) The people from their social circle who would want them to reduce their sodium intake, and why.

For this analysis, leveraging NLP and machine learning, we carried out topic clustering.

This means we organized every open-end survey response to the given question into different topic groups based on semantic similarity imprinted in how people express themselves.

From these networks, we have organized the clusters into overarching themes with are presented in the form of bar graphs.

Preventing sickness is the top reason consumers believe they should monitor sodium intake, followed by the fact that sodium is bad for you and to maintain their current health.

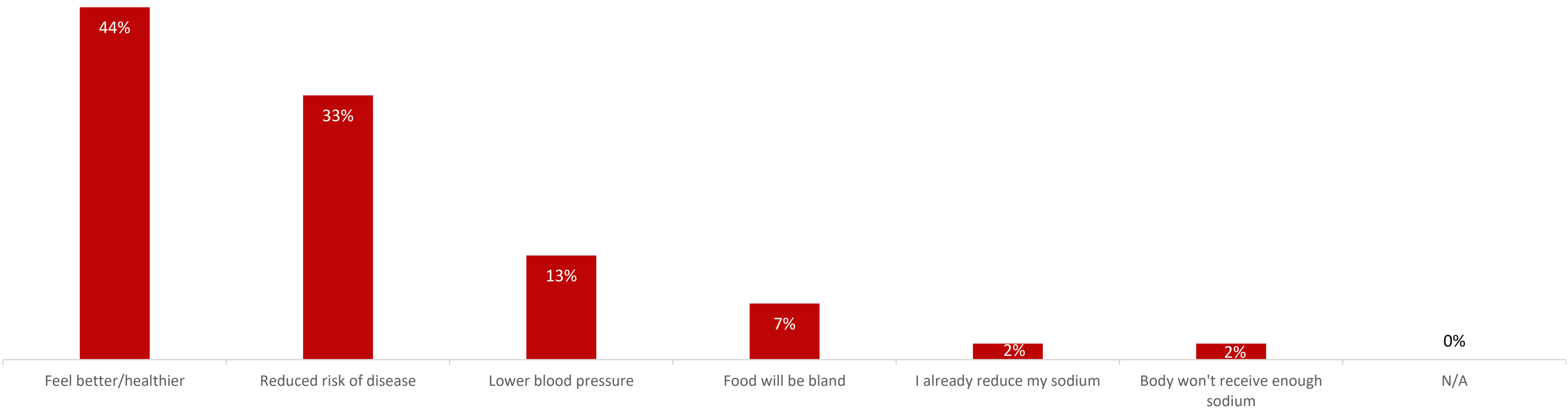


Note: All clusters from the 7-country analysis are displayed for consistency across country reports but may be 0% for some countries.

Q16: Why do you (personally) think you should monitor sodium intake? (Brazil n=1,026)

Consumers recognize feeling better/healthier and reducing the risk of diseases as the top benefits of reducing sodium intake.

Top Overall Themes
If you (personally) reduce your sodium intake, what positive things would happen? Negative?



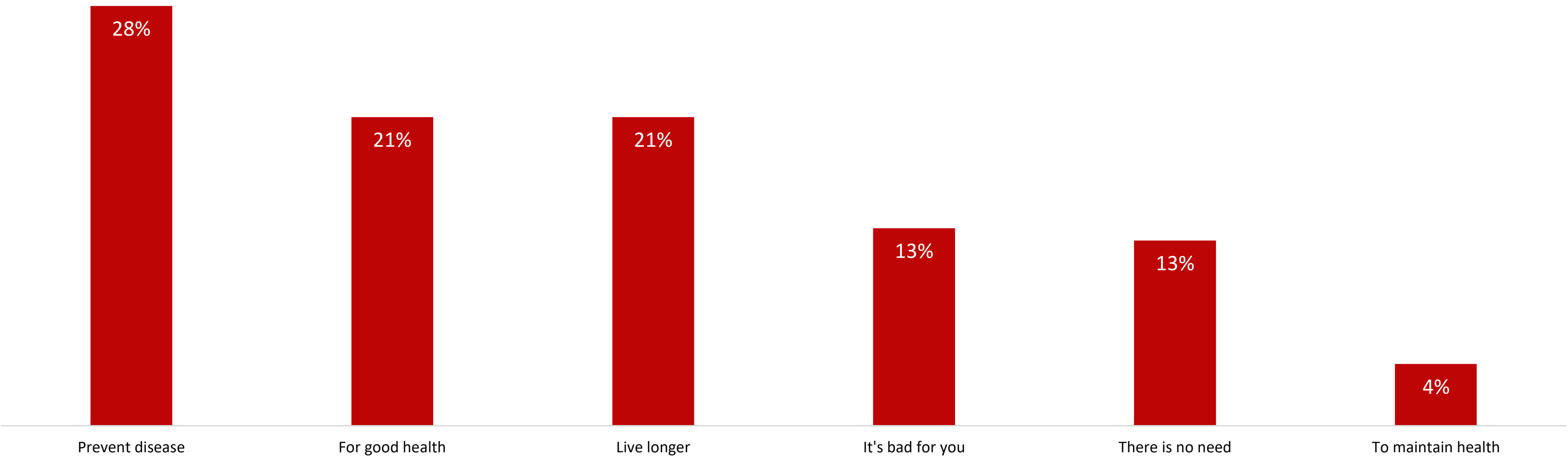
Note: All clusters from the 7-country analysis are displayed for consistency across country reports but may be 0% for some countries.

Q17: If you (personally) reduce your sodium intake, what positive things would happen? Negative? (Brazil n=1,026)

Preventing disease is the top reason to reduce sodium intake, along with good health and longevity.

However, more than 1 in 10 say there is no need to reduce sodium intake.

Who from your social circle (e.g., friends, family) would want you to reduce your sodium intake and why?



Note: All clusters from the 7-country analysis are displayed for consistency across country reports but may be 0% for some countries.

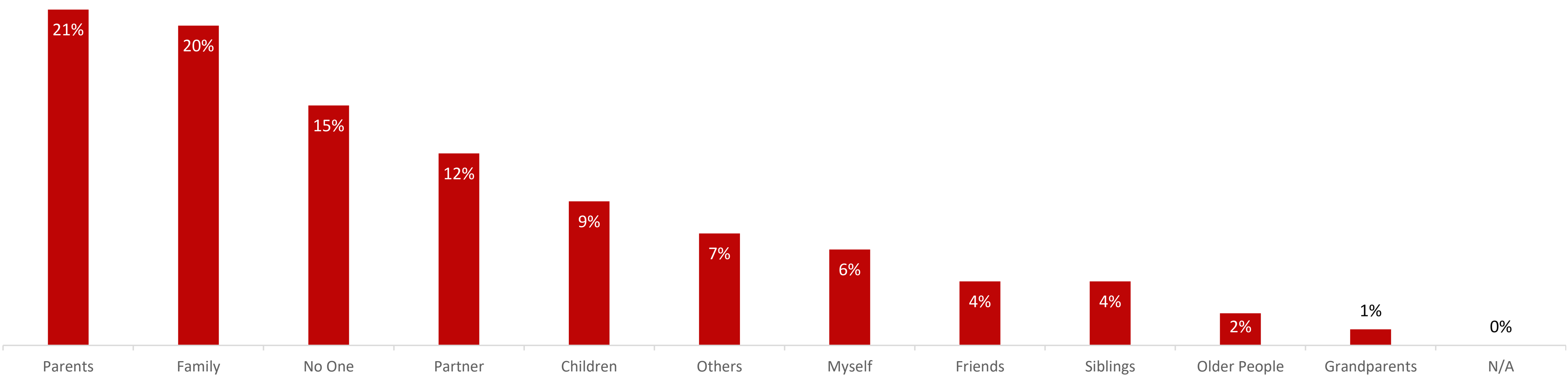
Q18. Who from your social circle (e.g., friends, family) would want you to reduce your sodium intake and why? (Brazil n=1,026)

Most say parents or family members would want consumers to reduce their sodium intake.

Like those who believe there is no reason to reduce sodium intake, slightly more than 1 in 10 say no one would want them to reduce sodium intake.

Who from your social circle (e.g., friends, family) would want you to reduce your sodium intake and why?

Bar Chart with 2961 of 3613 Nodes



Note: All clusters from the 7-country analysis are displayed for consistency across country reports but may be 0% for some countries.

Q18. Who from your social circle (e.g., friends, family) would want you to reduce your sodium intake and why? (Brazil n=1,026)

Reducing sodium intake for Brazilians ranks the same as it does among the 7-country total (#6). The market priorities are also aligned with the 7-country total – increasing vitamin-rich foods, intake of fiber and reducing intake of sugar.

Food and Nutrition Priorities
(Top 2 Box Important)

7-Country Total	Brazil
58% Increasing intake of foods rich in vitamins	**81%** Increasing intake of foods rich in vitamins
55% Increasing intake of fiber	**74%** Increasing intake of fiber
54% Reducing intake of sugar	**70%** Reducing intake of sugar
Reducing intake of sodium rank (out of 10): #6 (46%)	#6 (68%)

76%

Of Boomer respondents say that reducing sodium is their primary food and nutrition priority

Q7. When you think about your own food and nutrition priorities, how important are each to you? (7-Country Total n=7,090, Brazil n=1,026)

While more than half are currently taking steps to lower sodium intake including adding fresh vegetables, fruits and reducing sodium seasonings, there is a strong desire for greater information on how to easily reduce intake among Brazilians.

Personal Sodium Attitudes and Behaviors: Statement Agreement
(Top 2 Box Agree)

	7-Country Total	Brazil
I wish I had information on how to easily reduce my sodium intake	40%	62%
I add more fresh vegetables to my diet to help lower my sodium intake	43%	55%
I add more fresh fruit to my diet to help lower my sodium intake	39%	57%
I use spices instead of salt while cooking at home	34%	40%
I often use reduced sodium seasonings while cooking at home	32%	52%
*Flavor enhancers like umami contain less sodium than table salt	22%	24%
*Flavor enhancers like MSG contain less sodium than table salt	18%	20%

Q10. For each of the following statements, please rate how much you agree or disagree with each: (7-Country Total n=7,090, Brazil n=1,026)
** Sample was split between participants seeing MSG and umami (umami seasoning)*

Those with a personal or family diagnosis are on par with the market as a whole – 6 in 10 want more information on how to reduce sodium intake.

Personal Sodium Attitudes and Behaviors: Statement Agreement
(Top 2 Box Agree)

	7-Country Total	Brazil	Personal Diagnosis	Personal Diagnosis	Family Member Diagnosis	Family Member Diagnosis
I wish I had information on how to easily reduce my sodium intake	40%	62%	42%	61%	48%	64%
I add more fresh vegetables to my diet to help lower my sodium intake	43%	55%	46%	58%	50%	57%
I add more fresh fruit to my diet to help lower my sodium intake	39%	57%	42%	58%	46%	59%
I use spices instead of salt while cooking at home	34%	40%	36%	44%	38%	41%
I often use reduced sodium seasonings while cooking at home	32%	52%	35%	54%	38%	56%
*Flavor enhancers like umami contain less sodium than table salt	22%	24%	23%	29%	27%	26%
*Flavor enhancers like MSG contain less sodium than table salt	18%	20%	20%	23%	23%	20%

Note: 'Personal Diagnosis' reflects respondents that have been diagnosed by a medical professional with any of the following conditions: hypertension, heart disease, stroke, kidney disease/kidney stones, stomach cancer, or something else. 'Family Member Diagnosis' reflects respondents that currently live with a family member who has been diagnosed by a medical professional with any of the same conditions listed above.

Q10. For each of the following statements, please rate how much you agree or disagree with each: (7-Country Total n=7,090, Brazil n=1,026)
** Sample was split between participants seeing MSG and umami (umami seasoning)*

Key Generational Nuances (Brazil)

Food and Nutrition Priorities

- Older consumers are more likely than Gen Z to prioritize everything – including increasing intake of vitamin-rich foods and fiber, and reducing intake of sugar, artificial preservations and saturated fats.
- When it comes to reducing sodium intake, the same holds true – Millennials, Gen X and Boomers are more likely to prioritize it compared to Gen Z.

Sodium Reduction Tactics

- Gen Z is less likely than older consumers to add fresh fruit or vegetables to their diets in an effort to reduce sodium intake.
- Similarly, Millennials, Gen X and Boomers are more likely than Gen Z to use reduced sodium seasonings and spices instead of salt while cooking at home.

Flavor Enhancers: MSG vs. Umami

- Younger consumers – Gen Z, Millennials and Gen X – are more likely than Boomers to believe MSG contain less sodium than salt.
- There are no significant differences by age group when it comes to perceptions of umami containing less sodium than table salt.

Age Breakdowns: Gen Z (18-24), Millennial (25-40), Gen X (41-56), Boomer (57-75), Silent/Greatest (76+)

Brazil n=1,026, Gen Z n=207, Millennials n=345, Gen X n=264, Boomers n=205, Silent/Greatest n=5) *Indicates small sample size, findings should be considered directional only.*

BRAZIL SODIUM INTERVENTIONS

4

KEY TAKEAWAY

When it comes to reducing sodium intake, the most impactful interventions globally are also most impactful for Brazilian consumers - preferred grocery stores no longer carrying high-sodium options and governments reducing intake recommendations. However, successfully driving sodium reduction will require a mix of interventions that span government, food and beverage companies, news media and consumer education.

SODIUM REDUCTION INTERVENTIONS: WHAT WE TESTED

We tested the potential impact of nine different sodium reduction interventions, relative to one another.

This part of the survey was designed based on nudge theory, a common behavioral science concept for influencing behavior change.

Respondents ranked the impact of the nine tested interventions for motivating them to reduce their personal sodium intake.

Nine Interventions Tested:

- Government lowering the recommended amount of sodium in its dietary guidelines
- Government policy specifying the amount of sodium contained in a serving size
- Government requiring the labeling of naturally occurring vs. added sodium
- Food and beverage companies clearly labeling sodium content on packaging
- Food and beverage companies actively reducing sodium levels in their own food
- Food and beverage companies offering alternatives that reduce sodium while maintaining flavor
- Preferred grocery store not carrying foods that contain high amounts of sodium
- A medical professional recommending I reduce the amount of sodium I consume
- Factual media news or articles about sodium intake related to health and nutrition

Sodium Reduction Interventions: The Role of Grocery Retailers

Motivation to Decrease Sodium Intake
(Ranked 1-9; 1=Most Impactful and 9=Least Impactful)

7-Country Total	Brazil	
1st	1st	Preferred grocery store not carrying foods that contain high amounts of sodium
2nd	2nd	Government lowering the recommended amount of sodium in its dietary guidelines
3rd	3rd	Factual media news or articles about sodium intake related to health and nutrition
5th	4th	Government requiring the labeling of naturally occurring vs. added sodium
4th	5th	Government policy specifying the maximum amount of sodium contained in a serving size
7th	6th	Food and beverage companies clearly labeling sodium content on packaging
6th	7th	Food and beverage companies offering alternatives that reduce sodium while maintaining flavor
8th	8th	A medical professional recommending I reduce the amount of sodium I consume
9th	9th	Food and beverage companies actively reducing sodium levels in their own food

- Consumers indicate that if their preferred grocery store did not sell high-sodium foods, they would be motivated to change their sodium intake. In theory, this makes sense. If something is not available, then they are not able to select it and therefore their behavior would change.
- We know that taste and health/nutritional value are prioritized above all else when deciding what to eat - and 1 in 2 Brazilians currently believe low-sodium foods are flavorful and exciting. It's likely that consumers would be satisfied with grocery store options if high-sodium foods were removed as they believe they'd be flavorful and are interested in health outcomes.

Q19. Now, we'd like to understand how much each of the following would motivate you to change your sodium intake. In the list below, please select the ONE statement you find MOST impactful and the ONE statement you find LEAST impactful when thinking about reducing your personal sodium intake. (7-Country Total n=7,090, Brazil n=1,026)

Sodium Reduction Interventions: The Role of National Governments

Motivation to Decrease Sodium Intake

(Ranked 1-9; 1=Most Impactful and 9=Least Impactful)

7-Country Total	Brazil	
1st	1st	Preferred grocery store not carrying foods that contain high amounts of sodium
2nd	2nd	Government lowering the recommended amount of sodium in its dietary guidelines
3rd	3rd	Factual media news or articles about sodium intake related to health and nutrition
5th	4th	Government requiring the labeling of naturally occurring vs. added sodium
4th	5th	Government policy specifying the maximum amount of sodium contained in a serving size
7th	6th	Food and beverage companies clearly labeling sodium content on packaging
6th	7th	Food and beverage companies offering alternatives that reduce sodium while maintaining flavor
8th	8th	A medical professional recommending I reduce the amount of sodium I consume
9th	9th	Food and beverage companies actively reducing sodium levels in their own food

- Consumers believe that government interventions, like lowering recommended sodium guidelines, would be relatively impactful – in part because most assume they are following these national dietary guidelines today.
- We know that while 2 in 5 consumers are informed about these national guidelines, more than half are misinformed indicating that government interventions should be supplemented with dedicated consumer education efforts.

Q19. Now, we'd like to understand how much each of the following would motivate you to change your sodium intake. In the list below, please select the ONE statement you find MOST impactful and the ONE statement you find LEAST impactful when thinking about reducing your personal sodium intake. (7-Country Total n=7,090, Brazil n=1,026)

Sodium Reduction Interventions: The Role of the Media

Motivation to Decrease Sodium Intake
(Ranked 1-9; 1=Most Impactful and 9=Least Impactful)

7-Country Total	Brazil	
1st	1st	Preferred grocery store not carrying foods that contain high amounts of sodium
2nd	2nd	Government lowering the recommended amount of sodium in its dietary guidelines
3rd	3rd	Factual media news or articles about sodium intake related to health and nutrition
5th	4th	Government requiring the labeling of naturally occurring vs. added sodium
4th	5th	Government policy specifying the maximum amount of sodium contained in a serving size
7th	6th	Food and beverage companies clearly labeling sodium content on packaging
6th	7th	Food and beverage companies offering alternatives that reduce sodium while maintaining flavor
8th	8th	A medical professional recommending I reduce the amount of sodium I consume
9th	9th	Food and beverage companies actively reducing sodium levels in their own food

- Consumers recognize the importance of factual media reporting on sodium and nutrition.
- Consumers acknowledge the health benefits of reducing sodium, and most say family members would want them to do so. However, there is still a desire for more information on easy sodium reduction tactics.
- This indicates that, in the short-term, media stories should frame the nutritional importance of reduced sodium through the lens of health outcomes and helping loved ones.

Q19. Now, we'd like to understand how much each of the following would motivate you to change your sodium intake. In the list below, please select the ONE statement you find MOST impactful and the ONE statement you find LEAST impactful when thinking about reducing your personal sodium intake. (7-Country Total n=7,090, Brazil n=1,026)

Sodium Reduction Interventions: The Role of Food and Beverage Companies

Motivation to Decrease Sodium Intake
(Ranked 1-9; 1=Most Impactful and 9=Least Impactful)

7-Country Total	Brazil	
1st	1st	Preferred grocery store not carrying foods that contain high amounts of sodium
2nd	2nd	Government lowering the recommended amount of sodium in its dietary guidelines
3rd	3rd	Factual media news or articles about sodium intake related to health and nutrition
5th	4th	Government requiring the labeling of naturally occurring vs. added sodium
4th	5th	Government policy specifying the maximum amount of sodium contained in a serving size
7th	6th	Food and beverage companies clearly labeling sodium content on packaging
6th	7th	Food and beverage companies offering alternatives that reduce sodium while maintaining flavor
8th	8th	A medical professional recommending I reduce the amount of sodium I consume
9th	9th	Food and beverage companies actively reducing sodium levels in their own food

- Food and beverage companies can play a critical role by offering products that help consumers reduce their sodium intake while still prioritizing taste.
- Consumers may say that other interventions are more motivating to reduce sodium consumption, but that does not mean there is no role for food and beverage companies. In fact, their role is very important because company actions to change products, create new products and educate about delicious salt reduction are the only thing that can both provide lower-sodium (public health need and consumer desire) and taste (consumer desire).

Q19. Now, we'd like to understand how much each of the following would motivate you to change your sodium intake. In the list below, please select the ONE statement you find MOST impactful and the ONE statement you find LEAST impactful when thinking about reducing your personal sodium intake. (7-Country Total n=7,090, Brazil n=1,026)

Sodium Reduction Interventions: The Role of Medical Professionals

Motivation to Decrease Sodium Intake

(Ranked 1-9; 1=Most Impactful and 9=Least Impactful)

7-Country Total	Brazil	
1st	1st	Preferred grocery store not carrying foods that contain high amounts of sodium
2nd	2nd	Government lowering the recommended amount of sodium in its dietary guidelines
3rd	3rd	Factual media news or articles about sodium intake related to health and nutrition
5th	4th	Government requiring the labeling of naturally occurring vs. added sodium
4th	5th	Government policy specifying the maximum amount of sodium contained in a serving size
7th	6th	Food and beverage companies clearly labeling sodium content on packaging
6th	7th	Food and beverage companies offering alternatives that reduce sodium while maintaining flavor
8th	8th	A medical professional recommending I reduce the amount of sodium I consume
9th	9th	Food and beverage companies actively reducing sodium levels in their own food

- Relative to the other interventions, consumers feel less motivated to reduce sodium consumption because of a recommendation from a medical professional. Even among consumers who have personally been diagnosed with a health condition linked to high sodium, just 42% actively limit their sodium intake*.
- This underscores the need for additional interventions besides relying only on medical advice to motivate change.

*Among the 7-country total

Q19. Now, we'd like to understand how much each of the following would motivate you to change your sodium intake. In the list below, please select the ONE statement you find MOST impactful and the ONE statement you find LEAST impactful when thinking about reducing your personal sodium intake. (7-Country Total n=7,090, Brazil n=1,026)

Sodium Reduction Interventions: Overall Takeaways

Successfully driving global sodium reduction will require a mix of interventions that alter the environment of shopping for, preparing and eating food, so that consumers are more inclined to – consciously or subconsciously – make choices that ultimately reduce their sodium intake.

Taking into consideration both what consumers say and what we know about consumer sentiment and behavior, we recommend a combination of interventions from national governments and food and beverage companies, supplemented by a consumer education campaign and dedicated media strategy.

Government Interventions like those tested as well as increasing public education efforts around the importance of sodium reduction and sodium intake guidelines

F&B Company Interventions like offering new alternatives that reduce sodium while maintaining flavor and actively reducing sodium levels in their existing products

Consumer Education Campaign to combat misconceptions of sodium and get people to start seeing sodium reduction as important to their own health

Media Strategy to provide consumers with factual information about sodium and initially meeting them where they are by framing stories around their loved ones

Q19. Now, we'd like to understand how much each of the following would motivate you to change your sodium intake. In the list below, please select the ONE statement you find MOST impactful and the ONE statement you find LEAST impactful when thinking about reducing your personal sodium intake. (7-Country Total n=7,090, Brazil n=1,026)

Sodium Reduction Interventions: Audience Nuances (Brazil)

Generation	Decision-Making	Sodium Control
• Preferred grocery store not carrying high-sodium food is the most impactful intervention across age groups, followed by governments lowering the recommended amount of sodium in guidelines. • Boomers and Gen X are most likely to be motivated by factual media news or articles about sodium intake. • Similarly, Boomers are more likely than other age groups to say F&B companies offering alternatives that reduce sodium while maintaining flavor is impactful.	• Regardless of decision-making status, preferred grocery store not carrying high-sodium food is the most impactful intervention. • The second most impactful intervention for mealtime decision makers and those with shared responsibility is the government lowering the recommended amount of sodium in guidelines. • For those with no responsibility, government policy specifying the maximum amount of sodium contained in a serving size is the second most impactful intervention.	• On par with the market, preferred grocery store not carrying high-sodium food is the most impactful intervention regardless of level of control over sodium intake. • Second-tier interventions for those with control over sodium consumption include government lowering the recommended amount of sodium in guidelines and factual media news or articles. • However, for those with less control, second-tier interventions consist of government lowering sodium recommendations and the government requiring the labeling of naturally occurring vs. added sodium.

Age Breakdowns: Gen Z (18-24), Millennial (25-40), Gen X (41-56), Boomer (57-75), Silent/Greatest (76+)

Brazil n=1,026, Gen Z n=207, Millennials n=345, Gen X n=264, Boomers n=205, Silent/Greatest n=5) *Indicates small sample size, findings should be considered directional only.*

COUNTRY SPECIFIC QUESTIONS (BRAZIL)

TAKEAWAYS FROM COUNTRY SPECIFIC QUESTIONS

1

In general, whole foods are thought to be lower in sodium than more processed alternatives. Spices and grains like rice and quinoa are perceived to have lower sodium content than sauces, condiments, bread and pasta. Similarly, fruits and veggies are thought to have the lowest sodium content per serving, followed by protein, seafood and plant-based alternatives compared to processed foods like instant noodles, canned meats or sliced/smoked meats. The same holds true for beverages with processed drinks like soda thought to have the highest content compared to coffee, tea, milk and water.

2

More than half of consumers in the market buy their food at the local or chain grocery stores, followed by mom-and-pop, and specialty stores. Regardless of where most food shopping is done, 1 in 2 Brazilian consumers turn to YouTube and registered dietician/ nutritionist/ family doctors – the top trusted sources – to learn more about food and health nutrition.

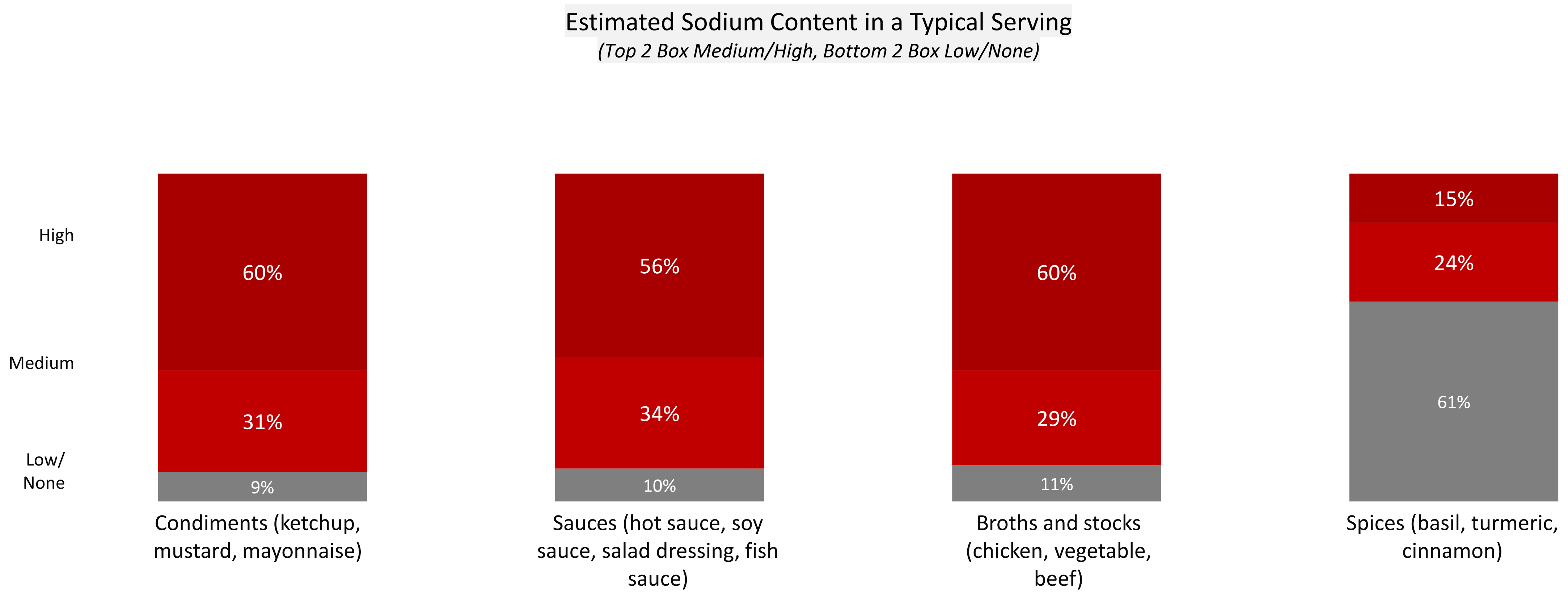
3

When it comes to the use of seasonings and condiments, tomato sauce is the most used condiment among Brazilian consumers, followed by chili sauce, ketchup and mayonnaise. However, most indicate they do not add MSG or Umami when preparing food.

4

Despite not adding additional MSG when preparing food, consumers do report adding salt while cooking, regardless of the type of food. 7 in 10 say that most people in Brazil are eating too much sodium and high sodium intake is an issue. This belief could stem from the acceptance of sodium in the market. In order to overcome these current perceptions and promote behavior change, consumer education is likely needed.

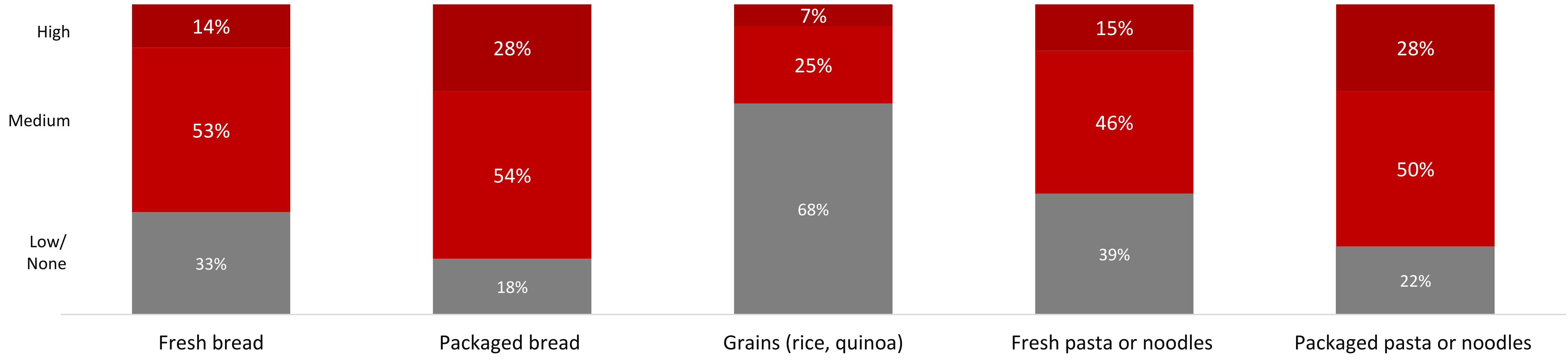
Brazilians believe spices have the least amount of sodium content per serving, while condiments, sauces and broths/stocks are thought to have high content.



Q20. When you think about the following foods, how much sodium, if any, do you believe each contains in a typical serving? (Brazil n=1,026)

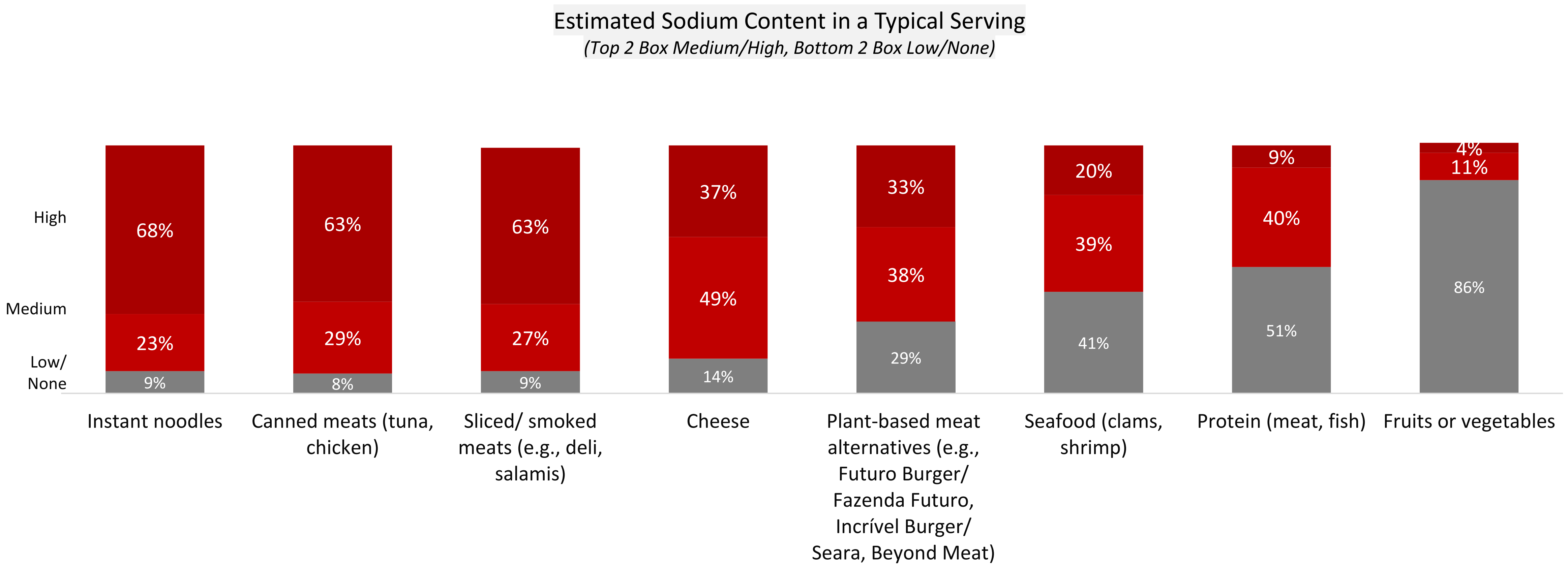
Similarly, grains are thought to have the lowest sodium per serving, followed by fresh pasta/noodles and fresh bread. In contrast, packaged bread and pasta/noodles are thought to have medium or high amounts of sodium.

Estimated Sodium Content in a Typical Serving
(Top 2 Box Medium/High, Bottom 2 Box Low/None)



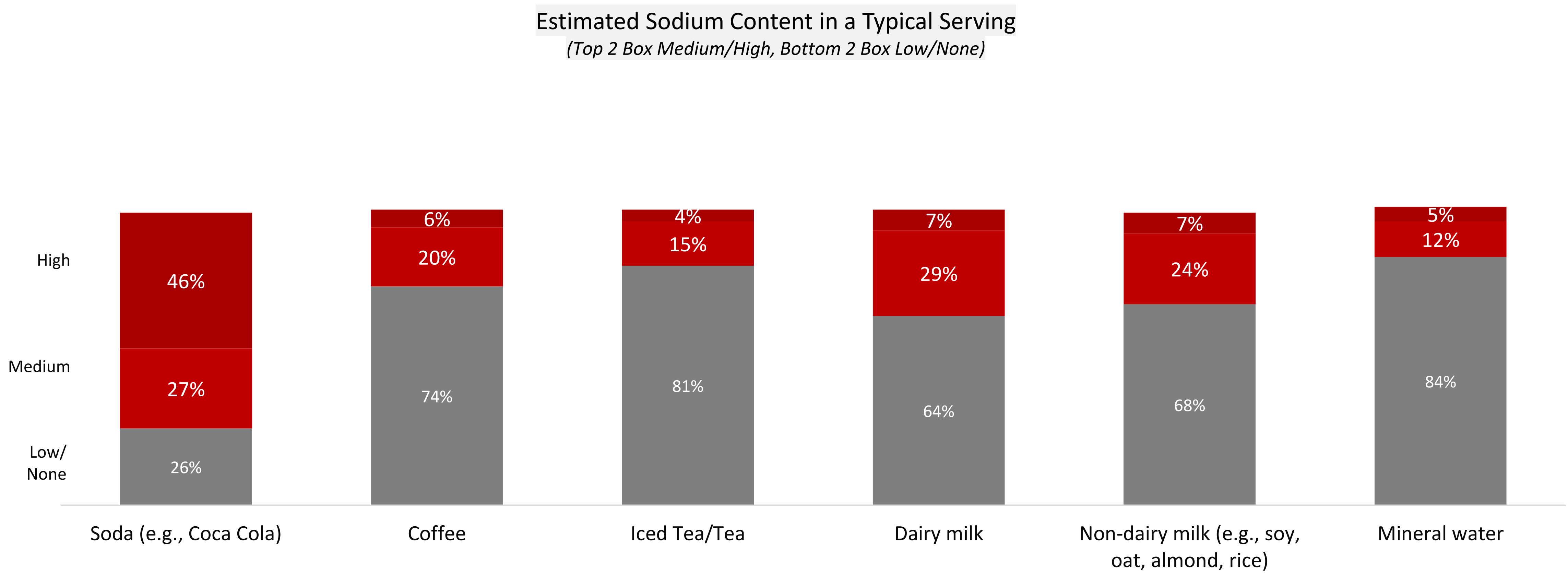
Q21.When you think about the following foods, how much sodium, if any, do you believe each contains in a typical serving? (Brazil n=1,026)

Fruits and vegetables are perceived to have the lowest amount of sodium, along with protein, seafood and plant-based meat alternatives compared to instant noodles, canned meats or sliced/smoked meats which are thought to have high sodium content.



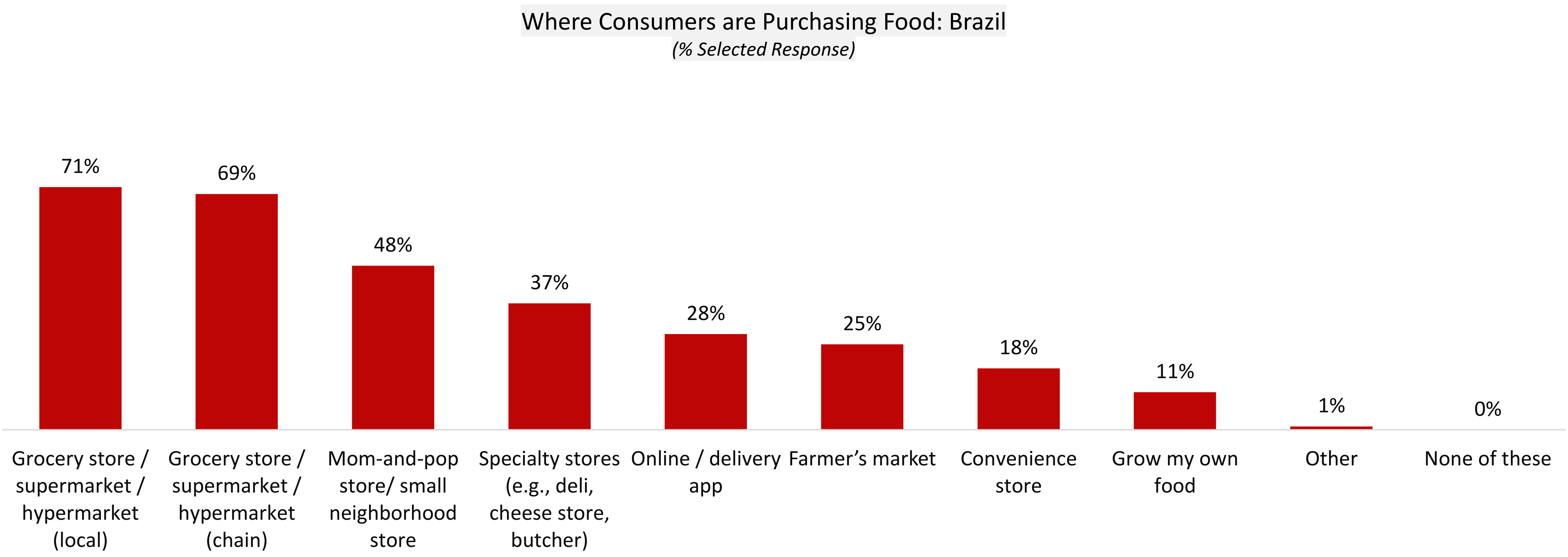
Q22. When you think about the following foods, how much sodium, if any, do you believe each contains in a typical serving? (Brazil n=1,026)

More natural beverages are thought to have less sodium content, while Brazilians believe soda has the highest amount of sodium per serving.



Q23. When you think about the following foods, how much sodium, if any, do you believe each contains in a typical serving? (Brazil n=1,026)

Most consumers are purchasing food at the local or chain grocery stores, followed by mom-and-pop, and specialty stores.



Q24. Where do you shop for your/ your family's food? Please select all that apply (Brazil n=1,026)

While 8 in 10 add salt while cooking protein or pasta/noodles, less than 6 in 10 report doing the same when it comes to vegetables or fried foods.

However, only a very small portion of consumers do not add any salt while cooking or at the table – suggesting it's common to use salt in this market.

Where Salt is Added During the Cooking and Eating Process

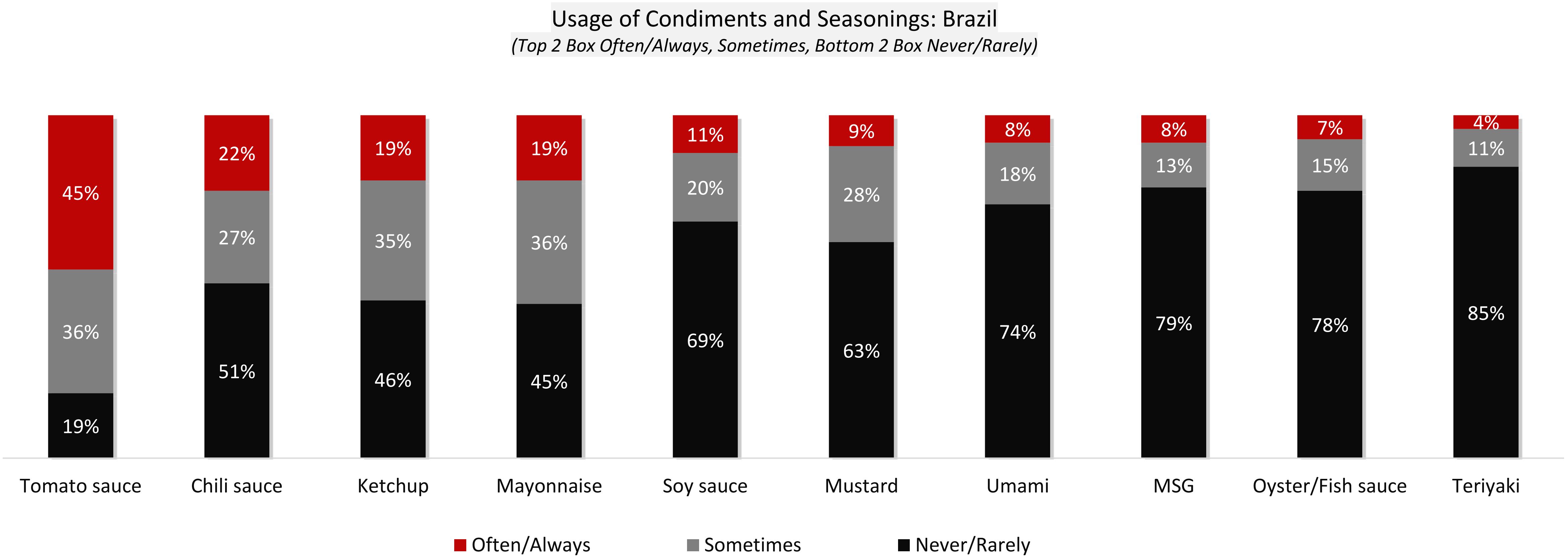
(Top 3 Box Add, % Selected Response)

	Protein (meat or fish)	Pasta, rice, noodles or grains	Vegetables or legumes	Fried foods
Add salt while cooking, at the table or both (T3B)	97%	97%	85%	93%
Only during cooking	80%	81%	51%	57%
Only at the table	6%	5%	24%	21%
Both while cooking and at the table	11%	10%	10%	15%
Neither when cooking nor at the table	3%	3%	15%	7%

Q25a. When cooking and/or eating the following foods, do you add salt: (Brazil n=1,026)

Tomato sauce is the most used condiment in the market, followed by chili sauce, ketchup and mayonnaise.

At least 3 in 4 report they never use Umami or MSG, which implies any low-sodium alternatives with these ingredients would need to be coupled with consumer education that reassures consumers that taste will not be compromised.



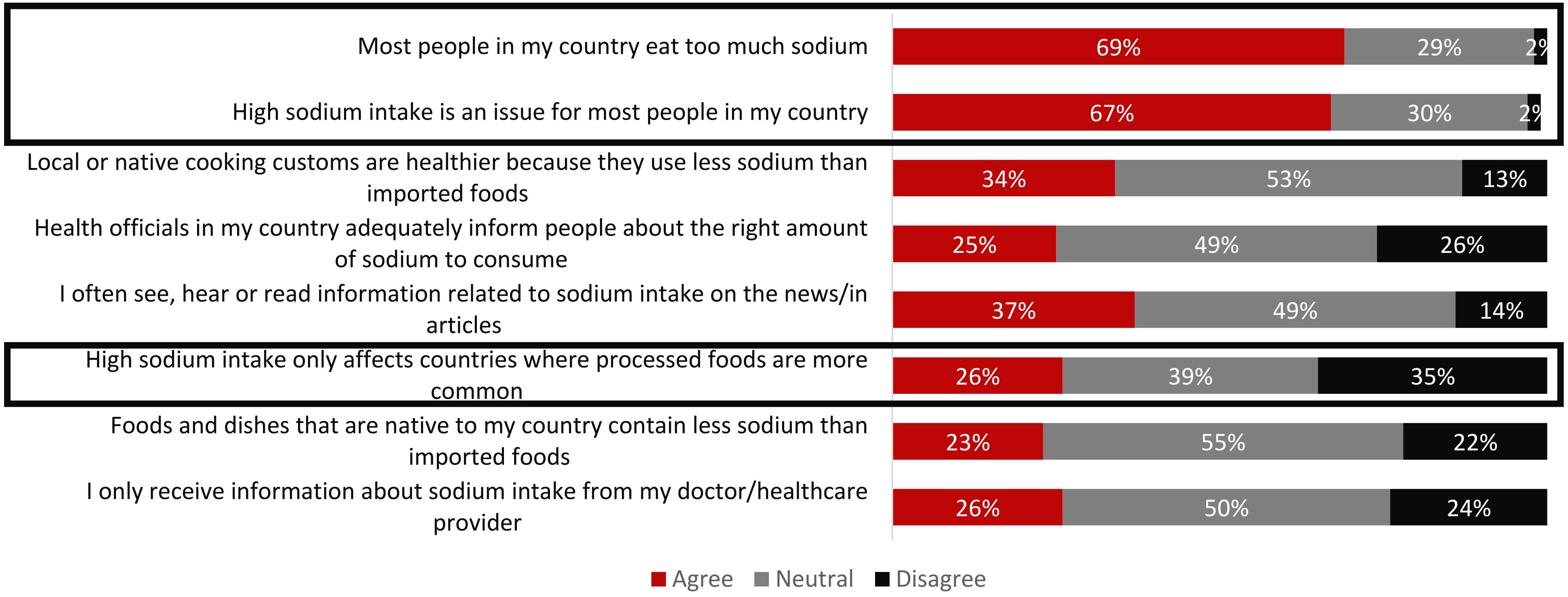
Q25b. When cooking and/or eating meals, how often do you use: (Brazil n=1,026)

There is widespread agreement that most people in Brazil are eating too much sodium and that high sodium intake is an issue for the market.

More than a third also acknowledge that high sodium intake can impact countries regardless of how common processed foods are.

Country-Specific Sodium Attitudes and Behaviors: Brazil

(Top 2 Box Agree, Neutral, Bottom 2 Box Disagree)



A fourth say they only receive information from their doctor, indicating that some Brazilian consumers may need to be reached through medical professionals as spokespeople for reducing sodium intake.

Q25. Please rate how much you agree or disagree with the following statements: (Brazil n=1,026)

Most consumers turn to YouTube, registered dieticians, search engines, or friends/family for information about food, health and nutrition.

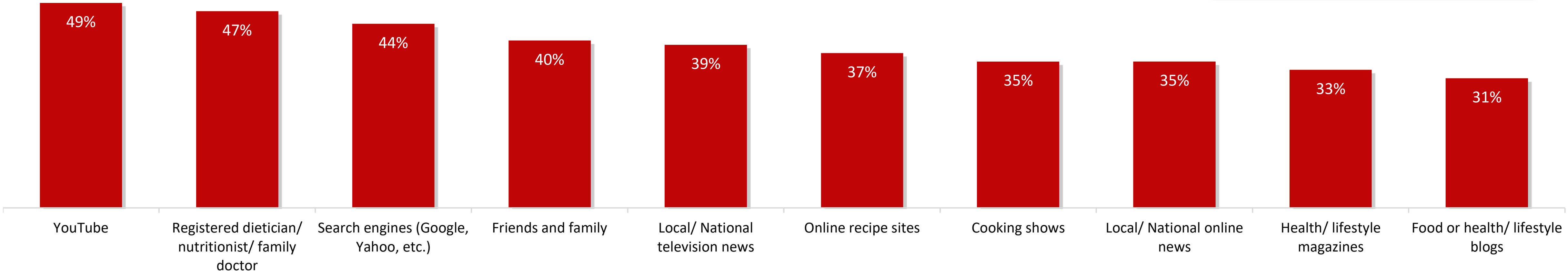
Across generations, registered dietician/ nutritionist/ family doctors is the most trusted source concerning information related to food, health and nutrition.

News and Information Sources

(% Selected Response, Top 10 Sources)

56% of Gen Z and 54% of Millennials regularly get their news from YouTube.

15% of Gen Z trust YouTube to provide them with information about food, health and nutrition.



Q26. Where do you typically find information about food, health and nutrition? Please select all that apply. (Brazil n=1,026)
Q27. Which sources do you trust the most concerning information related to food, health and nutrition? Please select up to three sources. (Asked of those selected at least one source: Brazil n=997)

Consumers who shop online or purchase/grow food locally are more likely to turn to multiple sources compared to those who shop in-person; however, registered dieticians and the World Health Organization are a trusted source for all.

News and Information Sources

(% Selected Response, Top 10 Sources ranked by market overall)

	Online / Delivery App Users	In-Person Shoppers	Local Purchasers/Growers
YouTube	62%	49%	58%
Registered dietician/nutritionist/family doctor	58%	47%	57%
Search engines	53%	44%	50%
Friends and family	46%	40%	50%
Local/National television news	48%	39%	46%
Online recipe sites	40%	37%	42%
Cooking shows	46%	36%	43%
Local/National online news	51%	35%	40%
Health/lifestyle magazines	44%	33%	39%
Food or health/lifestyle blogs	47%	32%	43%

Red shading indicates statistical significance relative to In-Person Shoppers

Top Trusted Sources

Online / Delivery App Users:
- Registered Dietician (47%)
- World Health Organization (WHO) (27%)
- YouTube (21%)

In-Person Shoppers:
- Registered Dietician (40%)
- World Health Organization (WHO) (20%) Search engines (17%)

Local Purchasers/Growers:
- Registered Dietician (45%)
- World Health Organization (WHO) (24%)
- YouTube (19%)

Note: In-Person Shoppers include those purchasing food at grocery stores/supermarkets/hypermarkets (chain or local), convenience stores, mass merchandiser/club stores, or mom-and-pop stores; Local Purchaser or Grower indicates those who shop at farmer's markets or grow their own food

Q26. Where do you typically find information about food, health and nutrition? Please select all that apply. (Brazil n=1,026, Online/Delivery App Users n=285, In-Person Shoppers n=982, Local Purchasers/Growers n=315)
Q27. Which sources do you trust the most concerning information related to food, health and nutrition? Please select up to three sources. (Asked of those selected at least one source: Brazil n=997)

THANK YOU