



Plant-Based Trends: PART 1, HEALTH AND WELLNESS

It's firmly taken root. Plant-based eating, already a growing way of life for many consumers, continues during the COVID-19 pandemic. The health and wellness concerns that spurred initial interest in plant-based and plant-forward diets are amplified, as people seek to shore up their nutrition. At the same time, projected scarcities of animal protein due to temporary closings of meat processing plants and belt-tightening in a rocky economy are also propelling interest in foods and beverages made primarily with plants. When this current situation abates, health-focused flexitarian lifestyles adapted by consumers across all demographics will pave the way for more innovations across a variety of products. But with taste cited by 65% of consumers as the number one driver of plant food purchases, regardless of health benefit, flavor is also key. Read on to see how to reap success with what's sown into the food landscape.

WELL AND GOOD

Consumer interest and acceptance of plant-based diets has increased in recent years, paving way for innovations across a variety of segments and products.

94%

of Americans say they are willing to eat more plant-based foods.

- Yale Program/Earth Day Network, Feb. 2020

24%

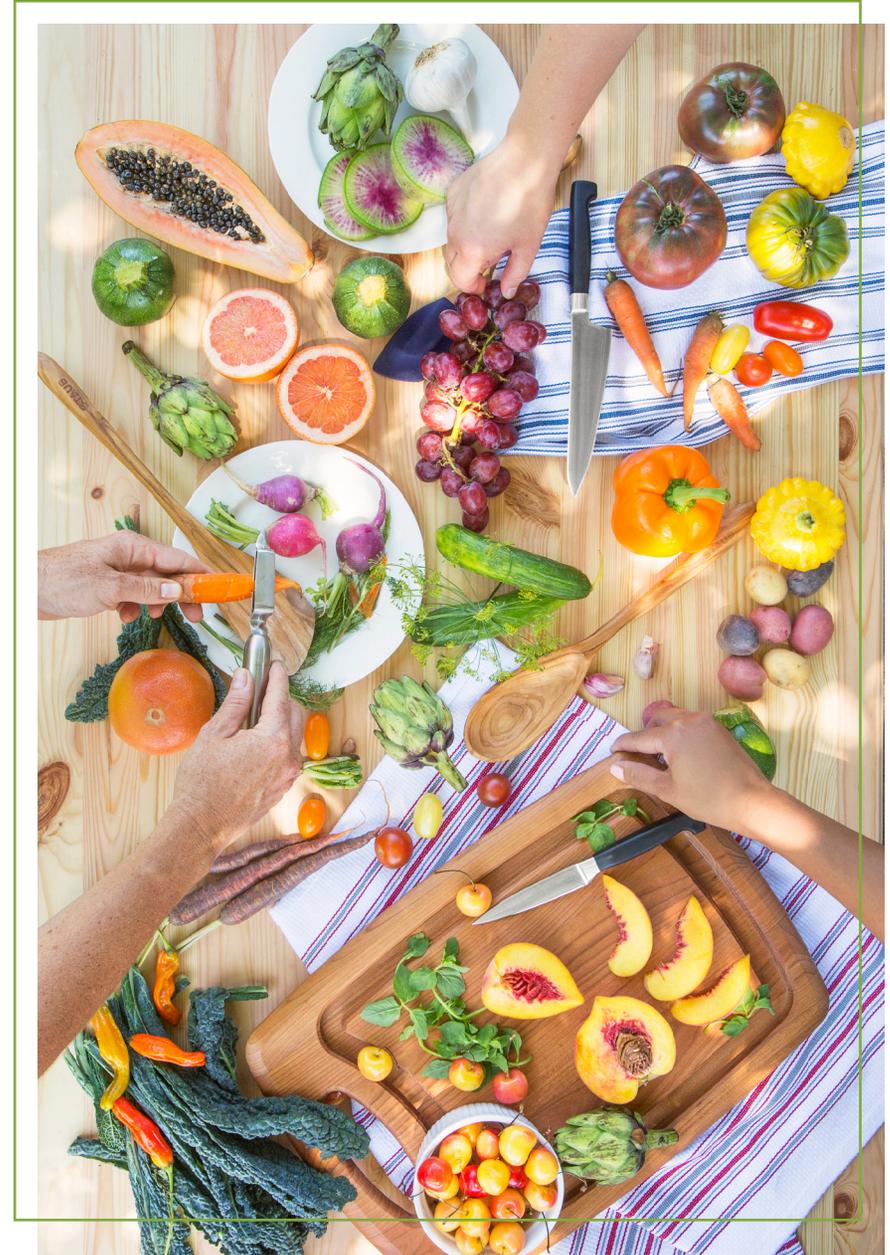
of consumers say they are eating more plant-based protein than they were a year ago.

- 2019 Food and Health Survey, International Food Information Council Foundation

11%

Sales of plant-based foods grew 11% in the last year to top \$5 billion.

- SPINS



HEALTH PERCEPTION



Even if it's not true in all cases (think fried veggie appetizers or sweet fruit juices), there is a widely held perception that plant-based diets are better for you.

- 46% of U.S. consumers agree with the statement that plant-based proteins are “better for you.”
- $\frac{3}{4}$ of U.S. consumers describe plant-based foods as “healthy” overall. - 2019 Food & Health Survey, IFIC

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“One of the biggest questions being asked right now is why are consumers eating plant-based foods? There are three main reasons: health, ethical and environmental. Health reasons, such as concerns about blood pressure or cholesterol, act as a main driver for consumers in general.”

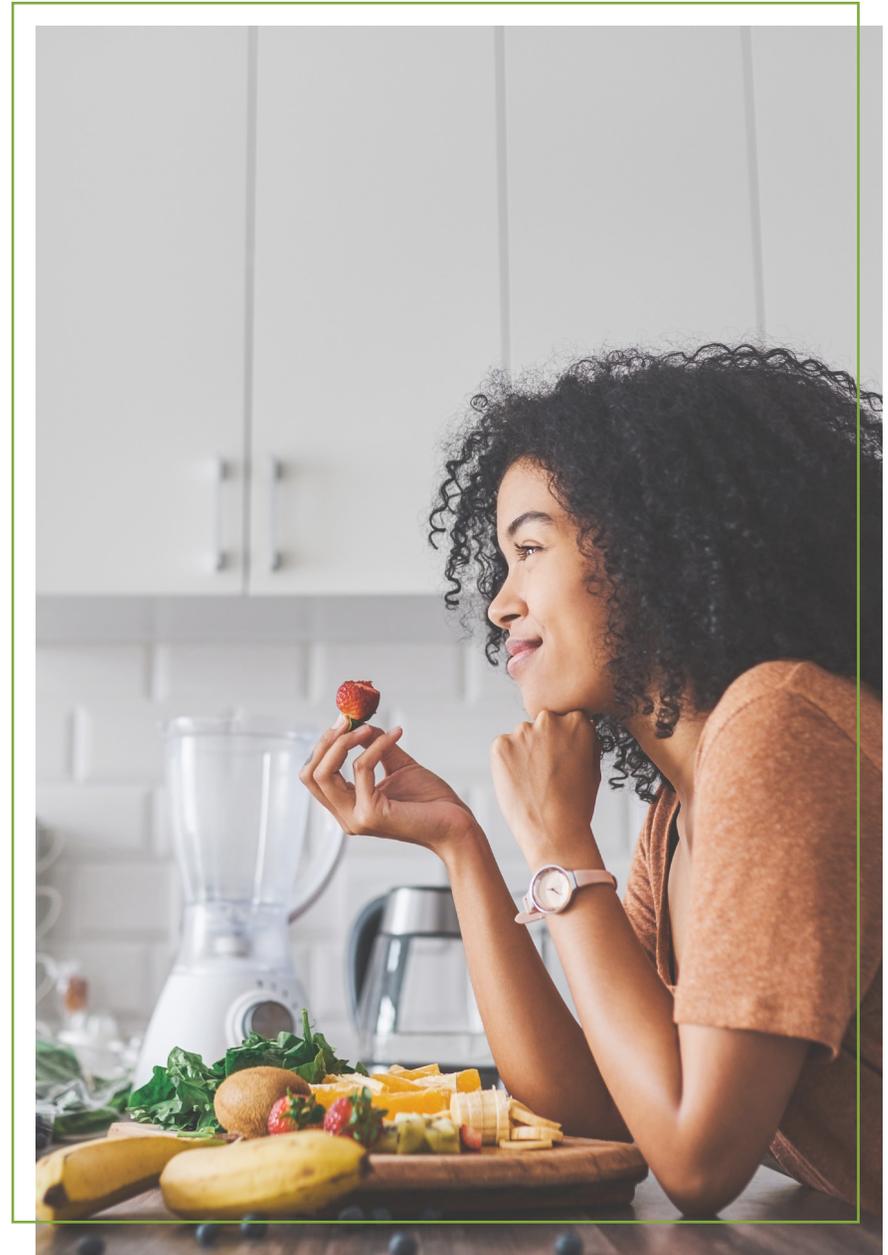
-MINTEL

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IN THE WEEDS

Digging into health and wellness concerns, it's clear that interest in plant-based foods is growing across all demographics but spiking in some groups more than others.

- 63% of Millennials say they are adding plant-based foods to their diets. - YouGov and Whole Food Market survey
- 79% of Millennials currently eat plant-based meats - Acosta
- 79% of Gen Z members eat plant-based items once or twice a week - Aramark
- 35% of Gen Z-ers say they plan to eat meat-free by 2021, compared to 32% of Millennials and 12% of the Silent Generation. - Finder Survey
- Consumers between 18 and 34 are the most likely to eat plant-based proteins in meat, cheese and milk - Mintel
- Flexitarians tend to be older women, while vegans and vegetarians are more often younger consumers. - Mintel



CROSS-POLLINATION



Plant-based eating may attract consumers because it aligns with other ways of eating healthier.

ON DEFENSE

In the COVID-19 era, there has been a marked increase in foods purported to boost immunity. While there are no natural defenses against a novel coronavirus, ingredients that improve the overall immune system are in demand to safeguard overall health and well-being. In fact, we recently discussed this topic in our **Ingredient Hot List on Immunity**.

PROTEIN PROS

The rise of protein-rich diets is also in sync with plant-based eating, with the consumption of protein forms not derived from animal sources. From tempeh to tofu and from lima beans to lentils, protein-rich plant foods are gaining strength.

ECO-FRIENDLIER EATING

The push for greater sustainability is likewise conducive to plant-based eating, with an increasing emphasis on conserving resources and lowering carbon emissions. Organic and GMO-free plant-based foods dovetail into this movement, too.

- Americans who are concerned about global warming are more willing than other consumers in the U.S. to adopt a more plant-based diet. - Yale

THE PANDEMIC IMPACT

There's no doubt that the global pandemic has greatly impacted food supply and demand and subsequent consumer choices. E-commerce, curbside pickup from restaurants and grocery home delivery have radically changed eating habits at home.

Retail sales of both meat and plant-based meat alternatives rose in March 2020.

- Sales of fresh meat alternatives jumped 255.3% for the week ending March 28, 2020
- Sales of fully cooked meat alternatives increased 50.2% for the week ending March 28, 2020
- Sales of regular meat surged 53.2% for the week ending March 28, 2020

Experts have different opinions on the effect of the COVID-19 pandemic on plant-based eating in 2020 and perhaps into 2021. Overall though, they expect plant-based consumer goods to continue growing despite the pandemic. In fact, the pandemic may be a factor in increased growth.



“The market for plant-based meats is predicted to grow from \$3.6 billion in 2020 to \$4.2 billion in 2021, driven in part by the functional benefits of plant based products, growing animal-borne illness such as COVID and demand for clean label products.”

-MarketsandMarkets

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“The market for plant-based protein continues to grow, undeterred by the COVID-19 pandemic. The outbreak may actually be helping to drive growth, some industry experts say.”

-MARKETWATCH



FLAVOR FACTORS

There is no tradeoff between health and wellness and taste. Consumers want and expect plant-based foods to be better for their well-being and nutrition, but also enjoyable.

- **Taste is the number one driver of plant food purchases, cited by 65% of consumers. The second leading factor is health attributes. - Mintel**

Flavor is pivotal in plant-based foods, which can have unfamiliar or “off” flavors for many consumer palates. FONA offers a wide range of solutions and its technical experts work closely with food developers to deliver products free of any off-notes that would be displeasing to consumers.

Some ingredients naturally pair well with plant-based foods to deliver on both plant-based and better-for-you benefits, such as chocolate and fruit and bold spices and vegetables. Other flavors are used to mask strong or grassy notes in plant-based foods that can be otherwise off-putting.



“First and foremost, taste is king when considering entering the plant-based foods category. Attributes such as health and convenience go far to drive consumption, but if the flavor profile falls below consumers’ expectations, then the product will likely have a short run.”

-NPD



MINCING WORDS

DEFINING MOMENT

There was a time when eating plant foods was synonymous with vegetarianism. Now, the definition of plant-based eating is broader and more entrenched.

- Nearly half (49%) of consumers have tried a plant alternative to animal meat
- 44% describe themselves as omnivores - IFIC

Terms like “plant-based”, “plant-forward” and “flexitarian” are more common, as consumers incorporate more fruits, vegetables, nuts/seeds, beans, legumes and other such ingredients into their diets. In some cases, they’re swapping animal protein for alternatives that mimic the look and taste of meat and dairy products. In other cases, people are simply trying to boost their intake of fresh foods derived from plant sources. A common denominator is the general move to modify what has been a traditional way of eating to improve one’s sense of personal well-being and health, without sacrificing taste.



“COVID-19 will push meat eaters back to animal protein at an accelerated pace, while vegetarians will celebrate plants being plants. Plant protein will learn to stand on her own while maintaining her individual personality.”

- CULINARY TIDES



WHAT'S IN A PLANT'S NAME?

Compound annual growth rate of plant-based products from 2016 to 2019:

- Items with the word “vegetarian”: 9%
- Items with the word “vegan”: 24%
- Items with the words “plant-based”, “100% plant”, “plant powered” or “plant protein”: 146%

Source: Winsight Grocery Business

TO YOUR HEALTH

If there are different yet interlinked definitions of plant-based eating, there are also several meanings associated with health and well-being. The notion of health and wellness encompasses a host of conditions:

- Disease and chronic illness prevention and support, including heart disease, stroke, hypertension, diabetes, cancer, etc.
- Brain and mental health, including cognition, clarity, mood, anxiety, etc.
- Weight loss/weight management
- Physical strength
- Appearance: healthy skin, nails, hair, etc.
- Immune system support



“Plant-based is not a cut-and-dried term. It can mean a product is, for all extents and purposes, vegan: It contains no meat or dairy products. Or it can mean it has some plant-based alternatives, such as a nondairy cheese or a non-animal derived ‘meat.’”

-WINSIGHT GROCERY BUSINESS



HARVESTING HEALTH BENEFITS

A diet rich in plant foods and ingredients has been linked to many aspects of improved health and wellness.

- Research has shown plant-based diets can lower rates of heart disease, type 2 diabetes and some cancers, compared to diets high in animal products. (Source: Harvard Health Publishing, Oct. 2019)

Not all plant diets are equal, of course. A study in the Journal of the American College of Cardiology released in July 2017 showed that a diet rich in healthy plant foods like whole grains, fruits, vegetables, nuts, legumes and healthy oils, along with a reduction of less healthy plant and animal foods, offered the lowest risk of heart disease. Those who followed unhealthy plant-based diets, like those with fruit juices, refined grains, potatoes and sugar sweetened beverages, had a higher risk of heart disease.



“Investigators have studied the relationship between plant-based food intake and various ailments in many, many studies. Spoiler alert: Eating more fruits, vegetables and whole grains wins.” “The Power of a Plant-based Diet for Heart Health,”

-MAYO CLINIC



CATEGORICALLY SPEAKING

As health and wellness concerns propel more people to consume plant-based foods, beverages and supplements more often, they are enjoying a wide variety of products.

SUBSTITUTE TEACHINGS

One of the most prolific areas of development in plant-based foods has been in products that mimic the look, taste, mouthfeel and other attributes of animal-based foods.

- 51% of consumers say they eat plant-based proteins in traditionally animal-based products such as meat.
 - 45% say they eat plant-based proteins in traditionally animal-based cheese and 41% say they consume plant-based protein in traditionally animal-based milk
- Mintel

One early and constant darling of the plant-based movement is the veggie burger, with trailblazers like Beyond Meat and Impossible Foods setting a new standard for meatless burgers and other alt-meat products. Other alt-meats, like faux sausages, hot dogs and nuggets are taking root, as are plant-based milks, cheeses, yogurts, ice creams and eggs.

PRODUCTS OF NOTE



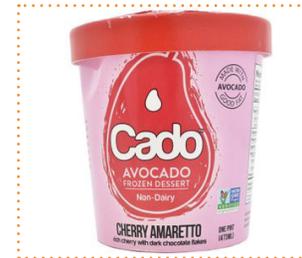
BEYOND MEAT PLANT-BASED PATTIES are ready to cook for grilling season, and provide 20 grams of plant-protein per serving. They are also free from soy and gluten.

Consumer Sentiment: **37%** of consumers responded they would likely or definitely buy this product.



STUMPTOWN ORIGINAL COLD BREW COFFEE WITH OATMILK, made with Oatly! plant-based milk, is a vegan coffee drink that's low in sugar and free from gluten and dairy.

Consumer Sentiment: **30%** of consumers responded they would likely or definitely buy this product.



CADO CHERRY AMARETTO AVOCADO FROZEN DESSERT is made with the "good fat" of fresh avocados and is described as a nutrient-dense dessert.

Consumer Sentiment: **32%** of consumers responded they would likely or definitely buy this product.



NUTTIN ORDINARY PLAIN CASHEW CHEESE is a plant-based, vegan and cultured cheese that also contains probiotics and plant-protein.

Consumer Sentiment: **32%** of consumers responded they would likely or definitely buy this product.

BEYOND REPLACEMENTS

While alternatives have become more mainstream, many plant-based foods and ingredients are enjoying stand-alone success as healthy options. It's less about mimicking and more about showcasing freshness and flavors.



PRODUCTS OF NOTE



WORTHY'S BLENDIE BOWL is teeming with fruits, vegetables, legumes and chia in a shelf-stable or chilled bowl, and is available in Strawberries & Greens, Dark Cocoa Cherry, Vanilla Orange and Green Tropics varieties.



HUNGRY BUDDHA CHOCOLATE CHIP KETO BAR is a plant-based, keto-certified bar that's free from gluten, GMO and nuts, with 9 grams of protein.



KIITO PLANT-BASED PROTEIN DRINKS are available in Vanilla Ashwagandha, Chocolate Maca and Matcha Moringa. All varieties have only one gram of sugar and 20 grams of protein per serving and are described as promoting optimal well-being, mental clarity, healthy detoxification, immunity, and energy.

THE TAKEAWAYS

Second only to taste, the desire for improved health and wellness is the main push in the growth of plant-based eating. With the COVID-19 pandemic changing the way people eat and further underscoring the importance of health and nutrition, plant-based foods and beverages are seen by many as even more valuable. Flavor is paramount to consumer satisfaction with plant-based foods, especially as many consumers try these products for the first time in rotation with traditional foods from animal sources. Taste and health, then, are the one-two punch that will knock plant-based eating towards the top of new lifestyles and preferences.

YOU DESERVE MORE. LET'S GET STARTED.

What does true partnership look like? You deserve a flavor partner ready to turn these trends into the tangible.

Let FONA's market insight and research experts get to work for you. Translate these trends into bold new ideas for your brand. Increase market share and get to your "what's next." Our technical flavor and product development experts are also at your service to help meet the labeling and flavor profile needs for your products to capitalize on this consumer trend. Let's mesh the complexities of flavor with your brand development, technical requirements and regulatory needs to deliver a complete taste solution.

From concept to manufacturing, we're here for you — every step of the way. Contact our sales service department at [630.578.8600](tel:630.578.8600) to request a flavor sample or [chat us up at www.fona.com/contact-fona/](https://www.fona.com/contact-fona/)

SOURCES

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- Aramark
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- Earth Day Network
- FoodDive
- Finder
- Good Food Institute
- Harvard Health Publishing
- International Food Information Council Foundation
- IRI
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- MarketsandMarkets
- MarketWatch
- Mintel
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- Plant Based Foods Association
- Shelby Report
- SPINS
- Whole Foods Market
- Winsight Grocery Business
- Yale Program on Climate Change Communication
- YouGov

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