



Ingredient Hot List

PLANT-BASED

It's clear – there's power in plant based. With a wide range of products spanning cross-category and innovative ingredient and flavor opportunities in this space, food and beverage developers are continuing to lean into the plant-based movement. And consumers are right on course with purchase factors varying from their search for healthier alternatives, environmentally friendly products, and more transparency of ingredients. We're taking a look at the trending plant-based ingredients and flavors that are popping up in a range of products spanning from plant-based dairy to meat alternatives, sweet and savory snacks and more. Let's see where your brand could benefit.

PLANT-BASED IS HERE TO STAY

Consumer interest for plant-based continues to grow, and so does the opportunity for innovation. Developers are innovating with new ingredients, formats and flavors which is providing much opportunity and competition in this space. Let's take a look.

WHY PLANT BASED?

- Healthy eating as a key market driver for this space as well as consumer interest in sustainability and environmentally and animal-friendly products. Consumers also appreciate the transparency of whole ingredients found in many plant-based products.
- "Meatless Monday" and similar promotions have influenced many consumers to implement alternatives throughout their diet rather than cutting off non-plant-based foods entirely.

36 of the top 100 best food and beverage sellers had a plant-based attribute and 22 were vegan, according to IRI's 2021 New Product Pacesetters. - IFT



GROWING ROOTS:



15.5% CAGR

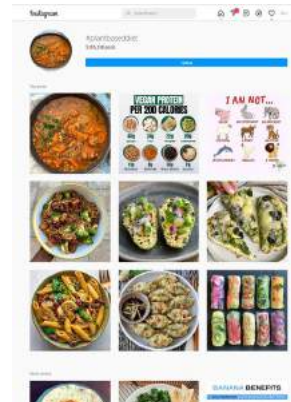
The Plant-Based Market will garner a CAGR of 15.5% between 2022 and 2030 and touch USD \$12,341.6 Million by 2030.



**MORE THAN
4 IN 10 SHOPPERS**

at least occasionally eat plant-based meat, dairy, or seafood alternatives, according to FMI

SOCIAL STATUS:



39.3M POSTS with #plantbased and **5.1M POSTS** with #plantbaseddiet on Instagram



4.2B VIEWS for #plantbased and **331.2M VIEWS** for #plantbased recipes on TikTok

FAVORITE FLAVORS

TOP FLAVORS

For North America new product introductions in the past three years with Plant-Based claim

- Vanilla/Vanilla Bourbon/Vanilla Madagascar
- Peanut Butter
- Ranch/ Ranch Sauce
- Berry
- Salt (Sea)/Fleur de Sel
- Cocoa/Cacao
- Barbecue/BBQ/Barbacoa
- Italian

FASTEST GROWING FLAVORS

Q1 2021 vs Q2 2022

- Chocolate (Dark/Black) +300%
- Chili/Chili Pepper +200%
- Chia/Chia Seeds +200%
- Berry +100%
- Blueberry +100%



TASTE MATTERS!

53% of consumers say taste concerns hold them back from eating plant-based foods at all or more often.

HEMP SEEDS



Noted as a “nutritional powerhouse” by Applied Foods, hemp seeds contain all nine essential amino acids, antioxidants, and mineral content. They also include a healthy amount of dietary fibers and fatty acids such as omega-6 and

omega-3. Their nutritional profile itself is a key interest for consumers looking for healthy alternatives in the plant-based space. For developers, hemp seeds are an opportunistic for product innovation as they support a diverse range of baking applications and other segments due to their functional benefits.

MARKET & CONSUMER SENTIMENT

- +65% growth in past 4 years
- Applied Foods calls hemp grain protein “one of the most promising emerging ingredients in this space”
- “The global hemp seed market was valued at US\$ 388.46 Million in the year 2020 and is expected to be US\$ 544.93 Million by 2027” - PR Newswire

PRODUCTS OF NOTE



ONCE AGAIN CREAMY SUNFLOWER HEMP BUTTER is made with roasted organically grown sunflower seeds that are milled smooth with organic hemp seed oil and salt and lightly sweetened. The product contains 210 calories, 18g fat, 6g carb and 5g protein per serving.

31% of consumers responded that they likely or definitely would buy this product



WEGMANS ORGANIC GRAIN & SEED MEDLEY VEGGIE BURGERS are made with millet, brown rice, spinach, carrots, sweet potatoes and seeds such as organic hemp seeds and sunflower seeds. This vegan friendly product is provides 8g of total fat per serving and a serving of whole grains per unit and is said to be a good source of fiber.

37% of consumers responded that they likely or definitely would buy this product.

“There are many wondrous aspects of the cannabis plant. One of them is that hemp seeds are a superfood full of vitamins and other nutrients. Beyond this, the seeds of the hemp plant can contain as much as 25% protein... The seeds also contain all essential amino acids and are easy to digest. The end result creates a chewy, meat-like texture that is highly satisfying to consumers.”

– APPLIED FOODS

GREEN COFFEE BEAN EXTRACT



Mintel notes green coffee bean extract as a plant-based natural caffeine ingredient that offers cleaner energy-boosting benefits. The extract originates from raw, unroasted coffee beans containing less caffeine than regular coffee. It

is claimed to provide health benefits such as sustained energy and weight loss support as well as benefits related to cognitive function, mood balance and anti-aging.

MARKET & CONSUMER SENTIMENT

- 37% of US consumers state that they mostly select food and drinks that contribute to their overall wellness, providing opportunity for this ingredient in the plant-based space.
- Growing use in nutraceuticals and dietary supplements will likely boost market growth.
- “The global green coffee market size was valued at USD 34.03 billion in 2020. The market value is estimated to increase from USD 35.40 billion in 2021 to USD 47.22 billion by 2028 with a CAGR of 4.20% during the forecast period.” – Global Newswire

PRODUCTS OF NOTE



ZOA ENERGY WHITE PEACH ZERO SUGAR ENERGY DRINK utilizes green unroasted coffee beans as well as green tea to offer 150 mg of “clean caffeine” for the “everyday warrior.” It is said to keep you going during the day and claims to provide a focus boost, muscle support and strong antioxidants.

Source: Zoa



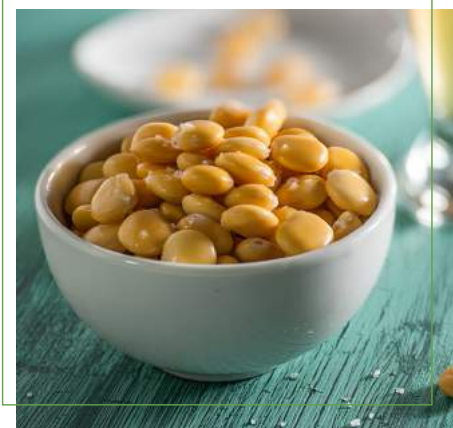
MAXINE'S BURN HAZELNUT HEAVEN FLAVOURED THERMOGENIC PROTEIN BAR contains dark chocolate, green coffee bean extract, L-carnitine and 14g of protein. It claims to ignite the metabolism and help burn fat. | Australia



BAI ANTIOXIDANT COCOFUSION ANTIOXIDANT BEVERAGE VARIETY PACK contains 10 calories per bottle and is an antioxidant infused coconut flavored water drink that has 10 calories, 55 mg of caffeine and 1 gram of sugar per serving. It comes in four flavors including Molokai Coconut, Madagascar Coconut Mango, Puna Coconut Pineapple, and Andes Coconut Lime and features green coffee extract as a caffeine source.

29% of consumers responded that they likely or definitely would buy this product.

LUPINI BEANS



A Legume and a member of the pea family, lupini beans vary in type – some are more bitter and firm and require extensive soaking to remove the bitterness while more recently used varieties are sweet, softer and require less soaking. A great

alternative to soy, the sweet variety have a nutty flavor and hearty texture and contain about 100 calories, 13 grams of protein and 2 grams of fiber per ½ cup serving.

MARKET AND CONSUMER SENTIMENT

- Lupini beans' high protein content, plant-based nature and increased sustainability has contributed to their increased popularity in the US.
- Developers are innovating ways to use this ingredient from innovations such as lupin-based protein powders to converting the beans into plant-based meat.
- "The lupin market is set to grow by USD 7.74 billion from 2021 to 2026 as per the latest market report by Technavio. The report projects the market to progress at a CAGR of 5.11%." – PR Newswire/ Technavio

PRODUCTS OF NOTE



WICKED KITCHEN PLANT-BASED ICE CREAMS IS A LUPINI BEAN-BASED ICE CREAM that comes in flavors such as Vanilla, Mint Chocolate Chip, Chocolate and Cookie Dough. The brand claims lupini beans to be the "tastiest vegan ice cream base out there" with extraordinary creaminess and mouthfeel.



NABATI PLANT EGGZ PLANT BASED SIMULATED LIQUID EGG features lupin protein isolate and contains no soy, cholesterol, gluten or eggs. This kosher certified product is uncooked, is said to scramble like an egg. One serving contains 100 calories, 6g protein 2g carbohydrates and 7g fat. | Canada



LUPINI ALMOND BUTTER, CINNAMON AND RAISIN LUPINI BEAN POWDERED BITE is made with only six ingredients. Lupini beans are said to provide three times more protein than eggs, three times more fiber than oats and to be a complete protein. The product provides 9g plant protein, 8g fiber and is free from added sweeteners, gluten and GMOs.

28% of consumers responded that they likely or definitely would buy this product.



BRAMI SEA SALT & VINEGAR ITALIAN SNACKING LUPINI BEANS is a vegan, keto and paleo friendly product that provides 7g of plant protein, 0g net carbohydrates and 60 calories per serving. It is free from soy, grains, gluten and GMOs.

27% of consumers responded that they likely or definitely would buy this product.

SOY



A more common ingredient in the plant-based space, soy is versatile and found in food and beverage applications from soy milks as a dairy-free alternative to tofu, spreads, sauces and more. Originating from the legume known as

soybeans, soy contains almost every amino acid besides methionine. Soy is very commonly used when developing meat alternatives in the plant-based space.

MARKET AND CONSUMER SENTIMENT

- Environmental concerns and concerns around animal exploitation have pushed the increased popularity of this ingredient.
- 60% of consumers consider soy foods like edamame, tofu, and soymilk made from soybeans to be “healthy.”
- 24% love or like Soy, 78% know it and 52% have tried it
- “Due to the COVID-19 pandemic, the global Soy Protein market size is estimated to be worth US\$ 3764.6 million in 2022 and is forecast to a readjusted size of US\$ 4600.9 million by 2028 with a CAGR of 3.4% during the review period.” – Globe Newswire

PRODUCTS OF NOTE



GARDEIN ULTIMATE PLANT-BASED CHICK'N TENDERS are a vegan-friendly product made from soy protein isolate that contains 15g protein per serving and is said to combine the perfect non-GMO plant-based ingredients to create chick'n that is as crisp and tender as the real thing with crunchy outside and juicy inside.

45% of consumers responded that they likely or definitely would buy this product.



KITE HILL PROTEIN DAIRY-FREE VANILLA FLAVORED PLANT-BASED YOGURT is made with almond milk, soy, live cultures, contains 11g plant protein and 6g sugar per serving, and is free from GMOs, gluten, artificial flavors and preservatives.

27% of consumers responded that they likely or definitely would buy this product.



SIMPLE TRUTH FREE FROM PLANT BASED KOREAN STYLE MEATLESS MEATBALLS in a Sweet Soy Glaze is a vegan product is described as plant-based, microwavable meatless meatballs with real meat-like texture in fried rice with kimchi, gochujang and a hint of spicy sweetness. It contains 13g of plant protein, can be easily prepared in about five minutes.

44% of consumers responded that they likely or definitely would buy this product.

“Soy-based food ingredients market has been thriving at the highest rate in the market, given their extensive use as a primary ingredient in the food sector.”

–GLOBE NEWswire

THE TAKEAWAYS

With loads of ingredient introductions and innovative technologies in this space, the plant-based market is booming. Developers can find opportunity in catering to consumers' search for sustainable, animal-friendly and great tasting products by leveraging the wide range of ingredients and format innovations that are popping up in this space. But while consumer interest in ethical products that positively influence our environment and society are important, developers cannot forget that taste is a non-negotiable — 53% of consumers say taste concerns hold them back from eating plant-based foods at all or more often. So, if you're just entering this space or are innovating your current product line, keep in mind that taste is key to consumer product trial and a factor in what will keep them coming back for more!

YOU DESERVE MORE. LET'S GET STARTED.

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SOURCES

- Mintel
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