



WHY ARE CONSUMERS CRAVING PLANT-BASED DIETS?

MACRO FOOD AND NUTRITION TRENDS

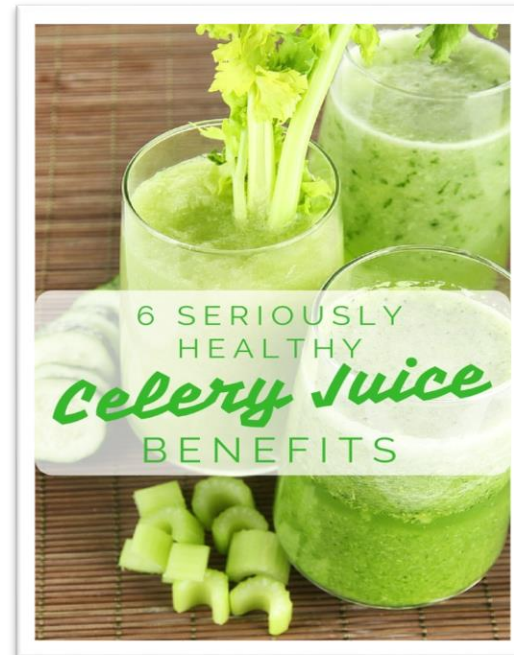
SUSTAINABLE DIETS

Evaluating food based on its environmental impact.



PERSONALIZED NUTRITION

Looking to food for specific functional attributes.



QUALITY FOOD EXPERIENCES

Seeking new tastes, adventure and discovery.



RISE OF PLANT-BASED EATING

Eating fewer animal products has become the new social movement – for personal and planetary health. It's driving food-tech startups, new product innovations, and restaurant menus.



54%

of consumers would like to eat more plant-based foods and beverages.



Millennials
52%

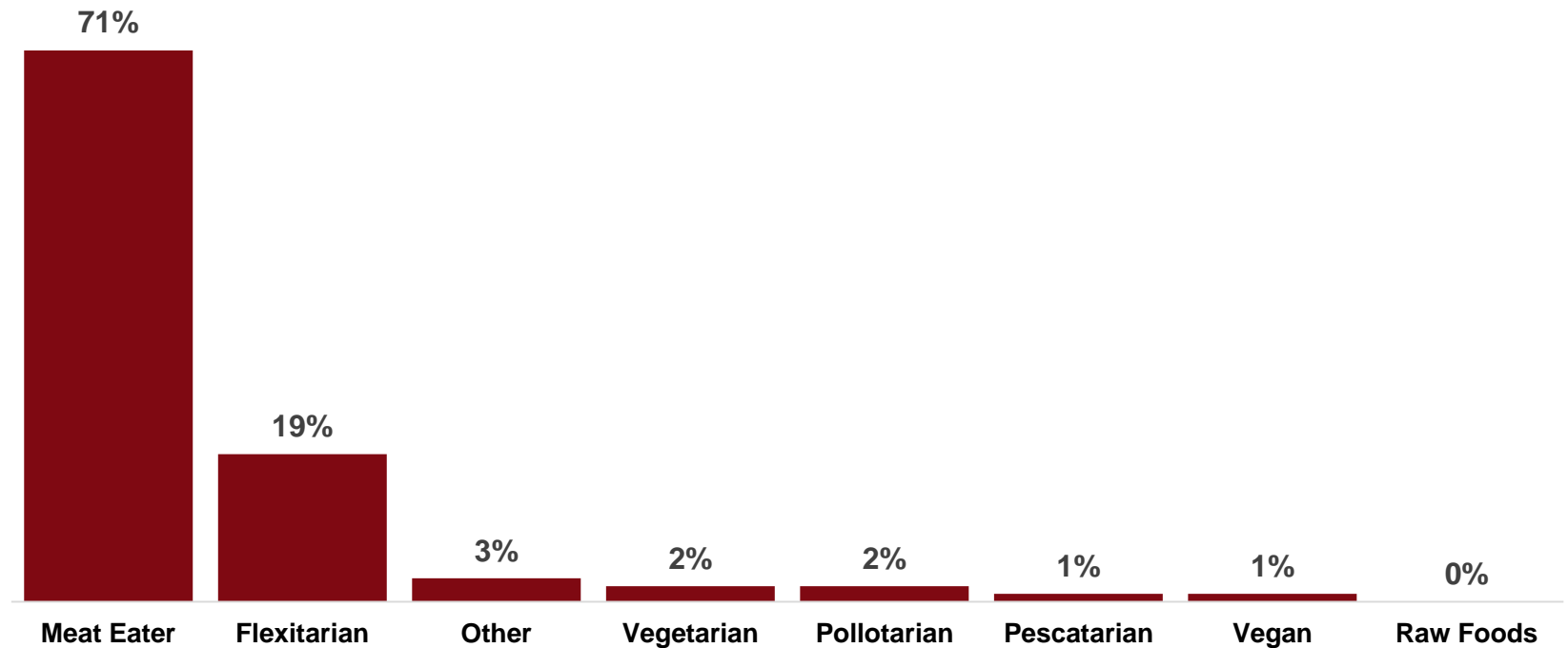
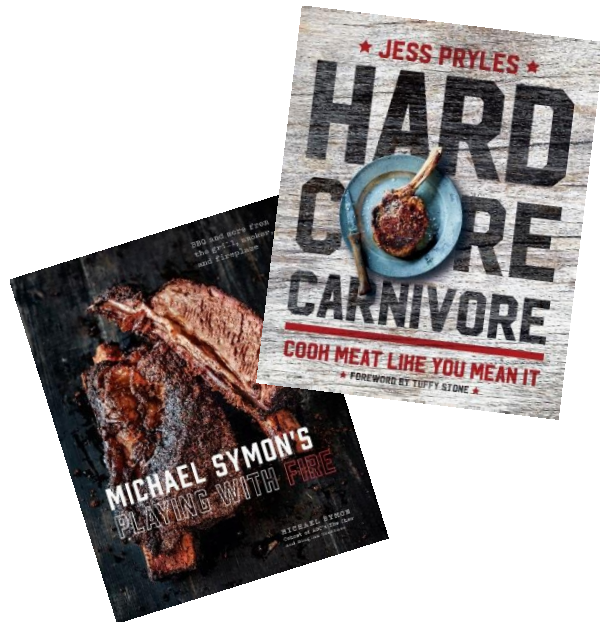
Gen X
52%

Boomers
58%



HOW PEOPLE EAT TODAY

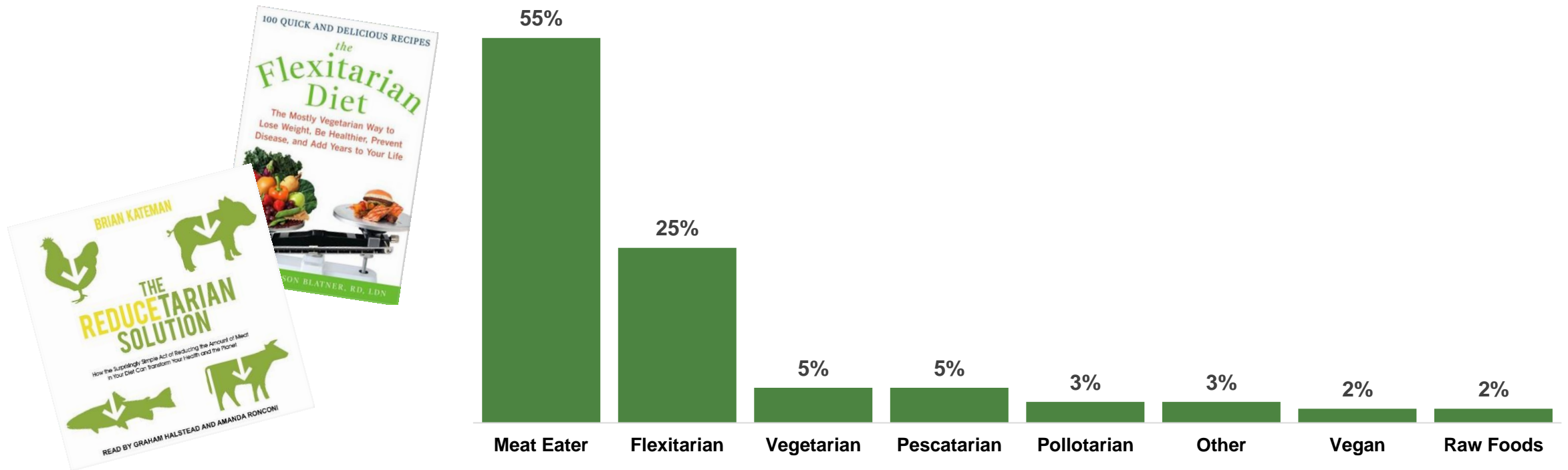
Most Americans still love meat, primarily for the taste and protein, but they are trying to be healthier.



Source: Datassential

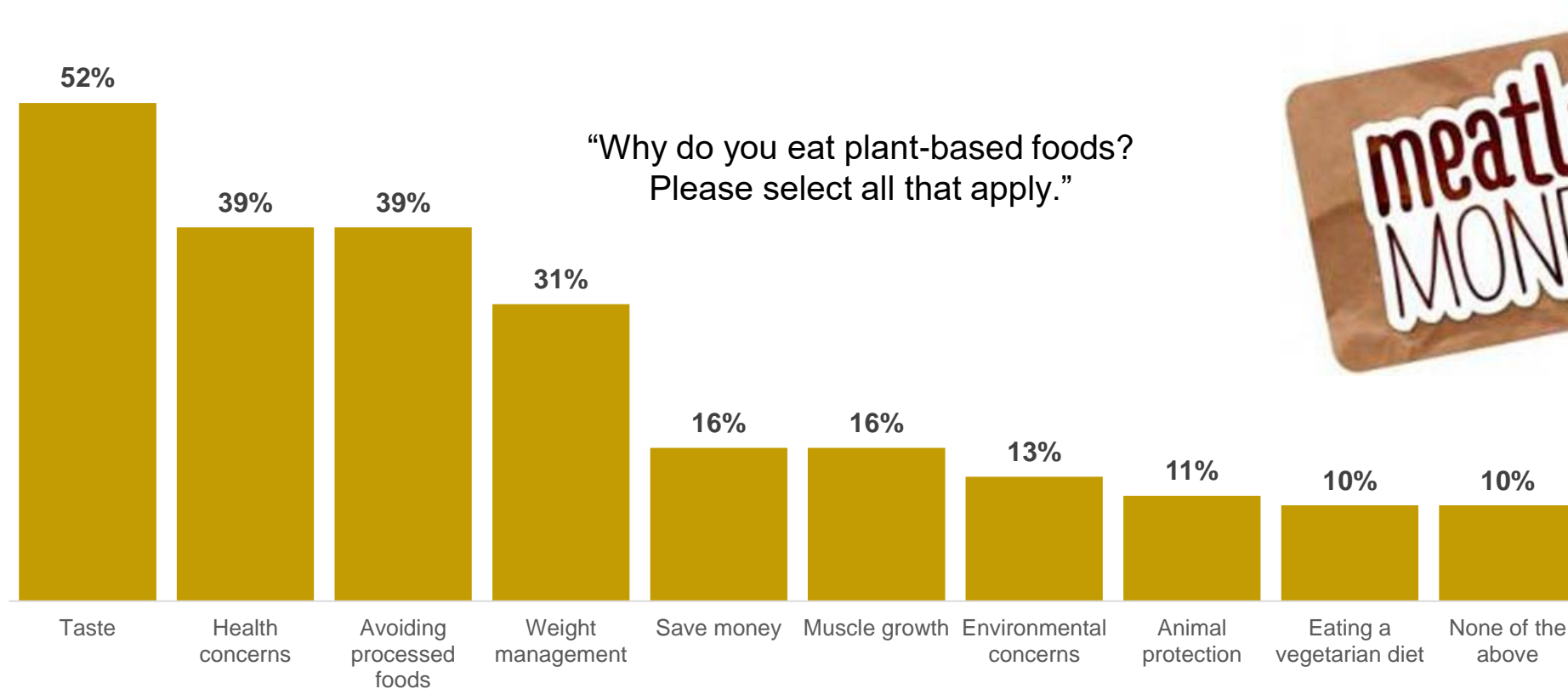
HOW PEOPLE WANT TO EAT TOMORROW

Consumers want to reduce meat intake, but few aspire to totally eliminate it.
The preferred approach is flexitarian or reducetarian.



Source: Datassential

MULTIPLE MOTIVATIONS TO EAT MORE PLANT-BASED FOODS



Top reason for eating meat alternatives is because people occasionally want to have meat-free days (31%).

EATING FOR PERSONAL AND PLANETARY HEALTH

New recommendations for a sustainable food system.

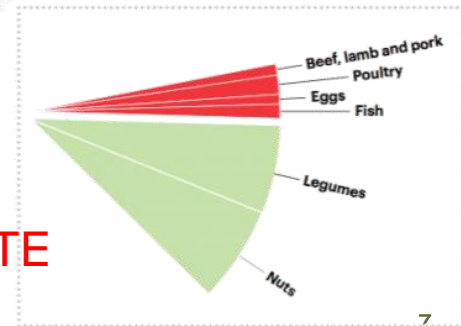


EAT-Lancet report says feeding 10 billion people by 2020 with a healthy and sustainable diet will be impossible without changing eating habits, improving food production and reducing food waste.

Moving to this new dietary pattern -- the “Planetary Health Plate” -- will require about 50% reduction in global consumption of red meat and sugar, while fruits, vegetables, legumes and nuts must double. Dairy is minimized.



PLANETARY HEALTH PLATE



CHALLENGES OF ALIGNING NUTRITION AND ENVIRONMENTAL GOALS

Some experts say EAT-Lancet recommendations are flawed and nutritionally deficient.

Macronutrients Micronutrients Red Meat Whole Grains

The EAT Lancet diet is nutritionally deficient

January 17, 2019 macro nutrients, micro nutrients, nutritional deficiency, red meat, the lancet, whole grains



EAT-Lancet Diet – inadequate protein for older adults

The inconvenient truths behind the 'Planetary Health' diet

Erica Hauver
Wednesday, February 6, 2019 - 1:30am

Sustainable diets? Mixed responses to landmark EAT Lancet dietary overhaul recommendations

Email Print Share - A +

POOR DIET LINKED TO 1 IN 5 DEATHS GLOBALLY

Low amounts of healthy foods found to be more significant than high amounts of unhealthy foods, including red meat and sugar sweetened beverages.

fruits
whole grains
vegetables
legumes
nuts and seeds
milk
fiber
calcium
seafood omega-3 fatty acids
polyunsaturated fatty acids



MAINSTREAMING OF PLANT-BASED

Organized movements –
from healthcare to trade shows.



International Plant-Based Nutrition Healthcare Conference

The Plantrician Project
Planting the seeds of change™



PLANT BASED WORLD
Conference & Expo

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We're bringing everything
PLANT BASED
under one roof.

The only event bringing the plant-based movement to a mainstream audience.

June 7-8, 2019 • Jacob K. Javits Convention Center • New York City

Lobbying and labeling.



Only plant-based foods that are intended to replace animal-based products such as meat, egg, and dairy alternatives are eligible.

CULTURAL SHIFTS DRIVING PLANT-BASED TRENDS

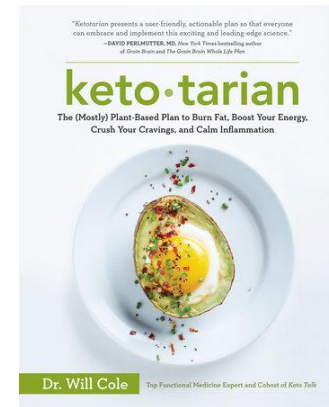
Rejection of government dietary advice.

HEALTHY EATING TODAY: CONSUMERS ARE BUILDING THEIR OWN CUSTOMIZABLE FOOD PYRAMIDS

Today, consumers' focus on fresh, less processed foods means that many find their own beliefs at odds with those of traditional authorities. This is particularly true of governmental guidelines, which many view as conservative, slow to change, and likely even compromised by industry. Despite "MyPlate" replacing the original USDA food pyramid, the principles of the food pyramid are what consumers often think of as representing traditional "mainstream" advice. In response, consumers are building their own customizable food pyramids. From our own health and wellness research, here's what this looks like.



Trending diets fueled by social media.



WHAT IS THE PEGAN DIET?



PureWow
FOOD

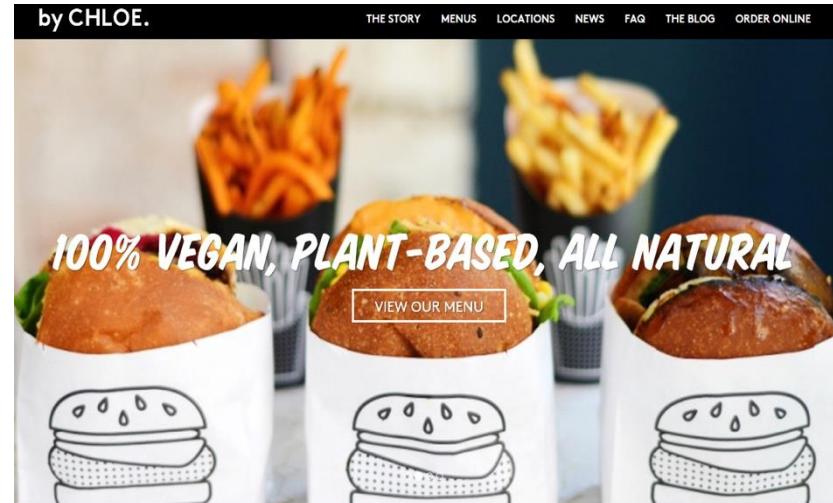
The Ketotarian Diet Is Trending (and Here Are 15 Recipes to Try for Dinner)

By LINDSAY CHAMPION | NOV. 20, 2018

Everyone's talking about the **keto diet**. And although it definitely might help you lose some weight, there's only so much bacon, chicken and cheese a person can eat. That's why we're switching to the ketotarian diet, a modification created by **Dr. Will Cole** that permits meat, fish and cheese in moderation, but focuses mostly on plant-based fats and low-carb veggies. Ready to get started? Check out these 15 tasty dinner ideas.

PLANT-BASED IS TOP DINING TREND

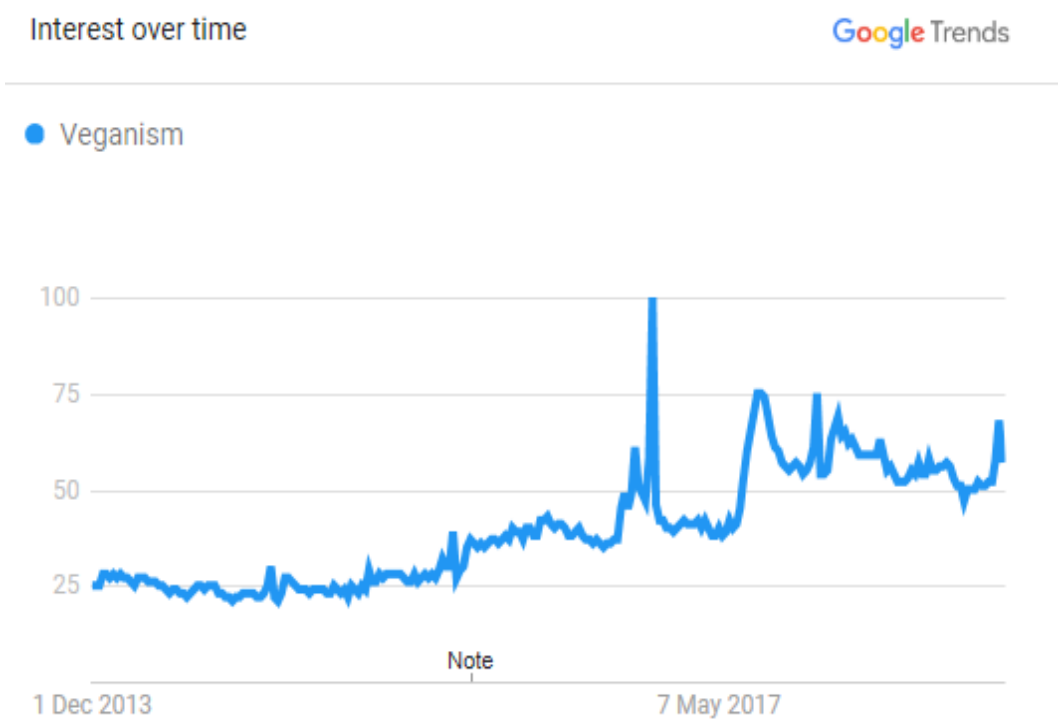
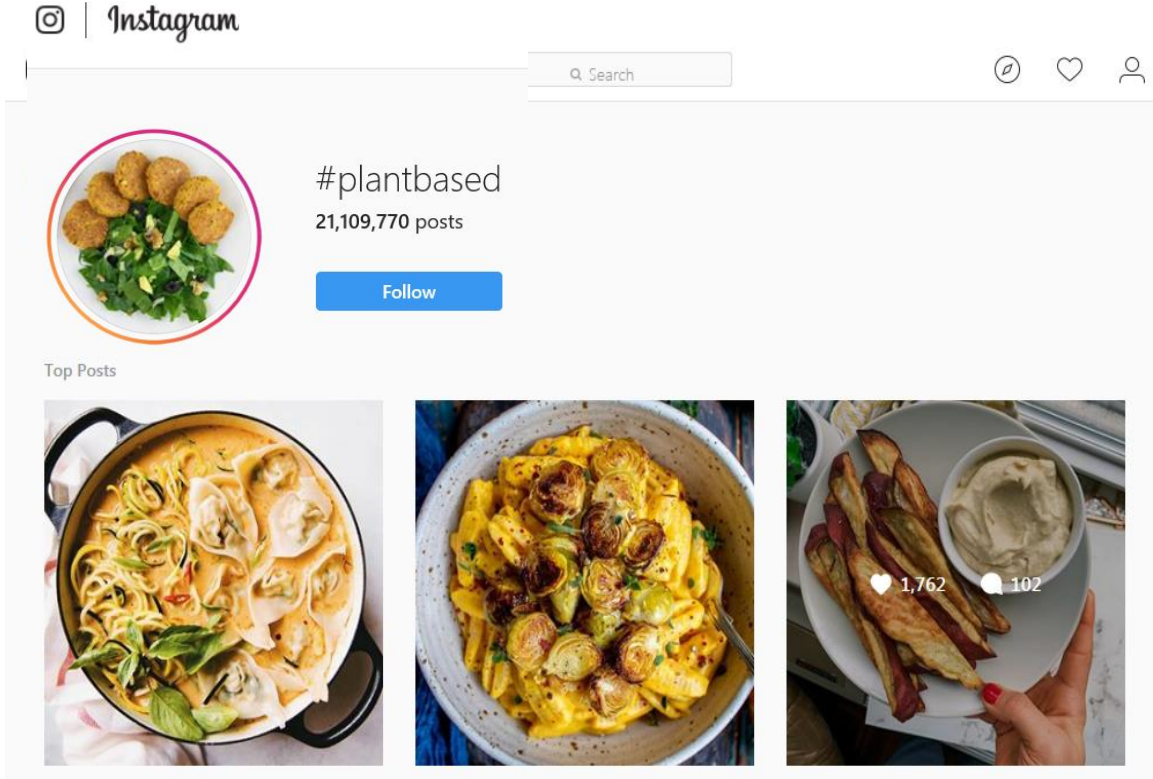
Fine dining and fast casual.



From ballparks to dining halls.

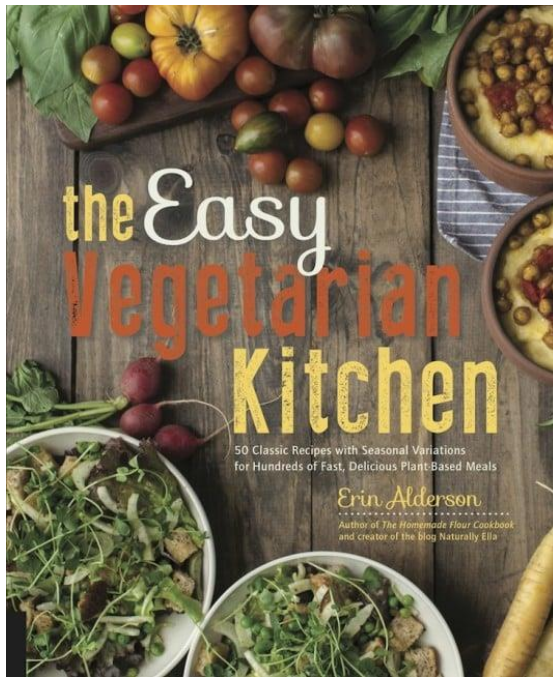


PLANT-BASED DOMINATES ON DIGITAL

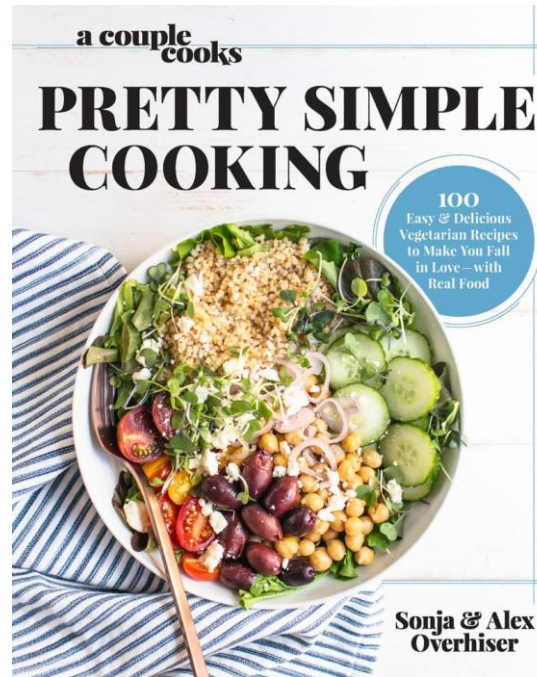


Yet, only 3% of Americans identify as vegan (Nielsen).

BEST-SELLING COOKBOOKS AND THE BIGGEST BLOGGERS ARE PLANT-BASED



NATURALLY
Ella



**a couple
cooks**



COOKIE+kate
Celebrating whole foods!

PLANT-BASED VIEWED AS 'FUTURE OF FOOD'

Traditional food companies have created initiatives to financially support new plant-based startups.



7 of the 15 most well-funded startups are plant-based.



DOUBLE-DIGIT GROWTH OF PLANT-BASED FOODS

U.S. retail sales of plant-based foods rose 20% to \$3.3 billion.



Sales Growth

131%

53%

43%

38%

24%

9%

Creamers

Yogurt

Cheese

Ice Cream

Meat

Milk

Volume

\$109M

\$162M

\$124M

\$222M

\$670M

\$1.6B

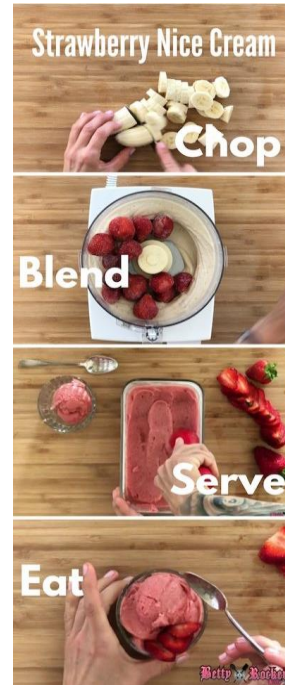
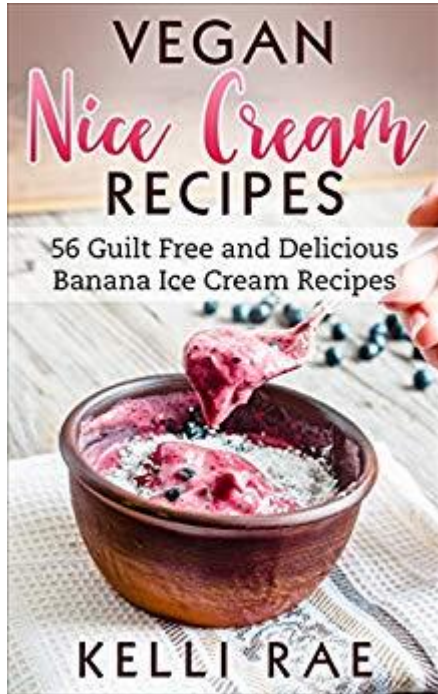
GROWING GLOBAL VEGAN ICE CREAM MARKET

Predicted to grow at CAGR of 9% through 2022, with artisanal vegan ice cream the fastest growing category and millennials a major driver.



DIY VEGAN ICE CREAM IS TRENDING

“Nice” cream made with coconut or almond milk, cashew cream, frozen bananas, or aquafaba.



CONTINUUM OF PLANT-BASED MEAT ALTERNATIVES

← in the lab

in the drive-thru →



Only 3 in 10 U.S. consumers would buy cultured meat.



Other options going mainstream.

ADVANCING A 'PLANT-FORWARD' PHILOSOPHY

A style of cooking and eating that emphasizes vegetables, whole grains, legumes and nuts – recognizing that animal protein can be included in smaller amounts.



Plant-Forward
Global 50



THE PROTEIN FLIP

PLANT-FORWARD MENUS: NEW APPROACHES TO PLATING, VISUAL APPEAL, AND VALUE

IF YOU START WITH A HOME-RUN VEGETABLE-BASED MENU CONCEPT THAT CAN STAND ON ITS OWN, YOU CAN ALWAYS SUPPLEMENT WITH A SMALL PORTION OF ANIMAL PROTEIN (EVEN AS A COMPLEMENT) IF DESIRED. HERE ARE JUST A FEW EXAMPLES:



GRILLED AND SMOKED BROCCOLI OODLES WITH BROCCOLI KRAUT AND BRUSSELS SPRIGS SALAD FROM NEW YORK, NY



CARROT OULET WITH PORK SAUSAGES FROM NEW YORK, NY



CAULIFLOWER STEAK, SEARED, GOLDEN BASTING, AND PICKLED FISH CHEE FROM NEW YORK, NY



PICKLED VEGETABLE FARM CORN PANCAKES, BUTTERBEAN, TOMATO, SHREDDED POTATOS FROM ALBANY, NEW YORK



EDAMAME BOWL WITH SCALLOP SALSA VERDE AND BLACK OLIVE SAUCE FROM NEW YORK, NY



LEAN PIZZOLA VERDE WITH HONEY'S PEPPERS, SCALLOP, MUSHROOM, AND TRUFFLE FROM BALTIMORE, MARYLAND

THE QUEST FOR VALUE AND EXPERIENCE:
We cannot simply take something away from diners and hope to be successful. We have to rethink the dining experience, our culture, operations and business, and rethink business development opportunities. Most of all, to make plant-based a better way to eat, we can create an additional source of financial value to offset, in the short or medium term, the cost of animal protein. In the long run, we want to see how we can create value for our customers, about what we value.



JAMES
BEARD
FOUNDATION



TRENDS AND COUNTER TRENDS DRIVE DEVELOPMENTS OF HYBRIDS



← meat eaters

vegetarian/vegan →



balanced innovation
SWEET SPOT

PLANT-BASED ISN'T ALWAYS HEALTHIER



Vegan Foods That Aren't as Nutritious as They Seem



Ice Cream

Re-creating ice cream without milk used to be a tall order. These days almost anything can be whipped and frozen, from soy to coconut. But don't let the lack of dairy fool you — some of these frozen confections can have more calories and fat than most standard ice cream brands. Just like regular ice cream, this is a treat and should be enjoyed in moderation. And if you'd rather go with sorbet, choose ones with minimal added sugar ... fruit is sweet enough as it is!

LIVESTRONG.COM

8 Vegan Foods That Aren't as Healthy as You Think



2. Vegan Desserts

These can be even worse for you than their butter-and-egg-containing counterparts. That's because to replace those ingredients food manufacturers add in starches, gums and pectins, explains plant-based dietitian Devon L. Golem, Ph.D., RD, LD. The result: They can contain more simple carbohydrates and calories than non-vegan desserts. If you're shopping for a vegan sweet treat, always read the ingredients list and keep an eye out for forms of sugar (if it ends in "-ose," it's probably sugar), oils, refined grains and synthetic ingredients, and be sure to compare different brands' calories, sugar and saturated fat content, recommends plant-based dietitian Sharon Palmer.

MARKETING OF PLANT-BASED FOODS

AVOID

Meat-free

Vegan

Vegetarian

Low-fat



EMBRACE

Origin

Flavor

Look and Feel

[color and texture]



House-made marionberry preserves, swirled into our tart and tangy, Eureka lemon-infused, dairy-free, plant-based frozen dessert.



Bright blueberries, a little cardamom spice and organic coconuts make a delicious flavor combo in our creamy coconutmilk frozen dessert.



QUESTIONS?