



Plant-Based Market Trends September 2019



**For more information, please contact
Tree Top Ingredients at
509-698-1435**

Source:
Jeff Schomaker, Mintel, Contributing Editor
Mintel Global New Products Database (GNPD)



Plant-Based

September 2019

Tree Top is proud to partner with Mintel to provide our customers with the latest research and new product introductions. Mintel is the world's leading market intelligence agency offering perspectives, purchasing data and insights.

A year of innovation in plant-based drinks, yogurts & ice cream, 2019

Provide probiotics

Innovating with pre- and probiotics can drive growth of plant-based products and resonate with consumers who are looking to improve their digestive health.

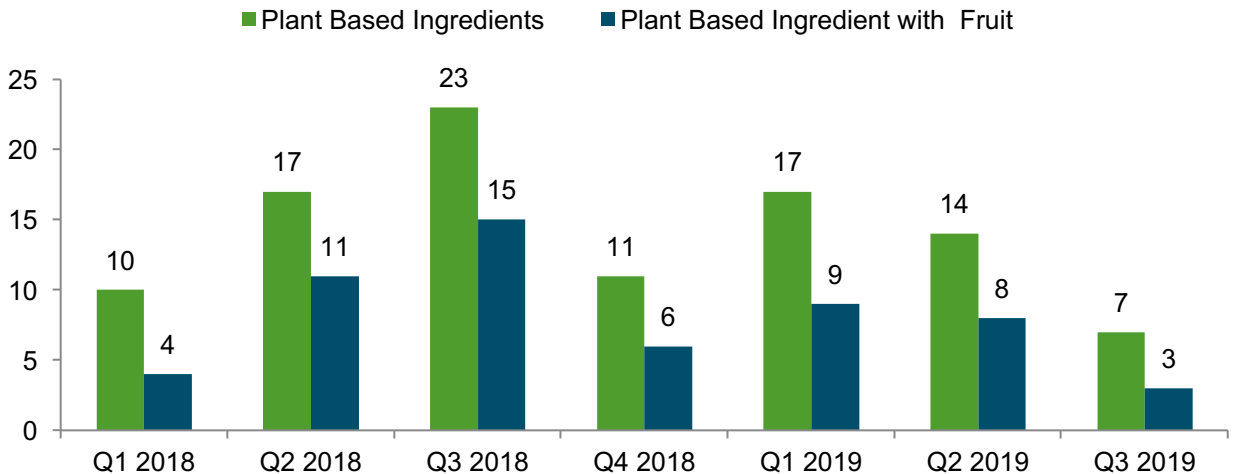
Tap into protein trends

Consumers continue to seek protein in their diets and brands can leverage this by innovating with high-protein sources such as pea protein, superfoods, nuts and seeds.

Commit to clean label

Brands which celebrate natural features like clean label recipes and natural ingredients are well-placed to appeal to plant-based product consumers. This offers opportunities for brands to innovate with organic and GMO-free ingredients

US Launches of Plant Based Ingredients vs Plant Based Ingredient with Fruits, Jan 2018 - Jul 2019



For more information, please contact us at 509-698-1435 • treetopingredients.com

Source: Mintel Global New Products Database (GNPD)





Plant-Based

September 2019

This section of the monthly update focuses on a specific food/drink category, aiming to provide you with an understanding of what's trending across **New Product Introductions**.

Gut Health is Growing Concern

Digestive health is increasingly recognized by dietitians and consumers alike as an integral part of overall wellbeing. Scientific research has found links between the gut microbiome and many aspects of health, from mental health to skin health and even obesity.

Probiotics, fiber, prebiotics and other functional gut health ingredients will resonate with consumers who are seeking a healthy and balanced digestive system.

In the US, 29% of adults who don't exclusively buy, but have bought non-dairy milk in the past three months, say they would be encouraged to buy more non-dairy milk if it contained **probiotics**.

Plant-based yogurt highlight probiotics for digestive health



Billions of probiotics in every cup

Nancy's Strawberry Hibiscus Flavored Probiotic Oatmilk Non-Dairy Yogurt includes *Bifidobacterium lactis* which is said to aid digestion and also *L. rhamnosus*, which may help to restore and maintain a balance of good bacteria in the gut (US).



Feel good from the inside out

Califia Farms Super Berry Probiotic Dairy Free Yogurt is a cultured nut milk drink that contains 10 billion live cultures of CFUs per serving, and features *Bifidobacterium*, BB-12, *S. thermophilus* and *L. bulgaricus* (US).



Probiotics and prebiotics

Hälsa Dairy-Free Blueberry Flavor Oatgurt is made with Scandinavian organic oats, contains probiotics and prebiotics and is free from added sugar, dairy and additives (US).



Plant-Based

September 2019

This section of the monthly update focuses on a specific food/drink category, aiming to provide you with an understanding of what's trending across **New Product Introductions**.

Organic, fair trade and natural ingredients can attract consumers



Organic ingredients

Three Trees Unsweetened Vanilla Bean Organic Almondmilk is made with just four ingredients, is USDA Organic, non-GMO and kosher (US).



Good, wholesome ingredients

Goodpop Orange N' Cream Frozen Pop contains real fruit juice and coconut milk, is made from Fair Trade-certified ingredients.



Only natural ingredients

Non-Dairy Chobani Strawberry Flavored Coconut Based Yogurt is made only from natural ingredients and is free from artificial flavours and sweeteners, preservatives and GMO ingredients (US).

Cleansing cold-pressed almond milk with lemon and ginger



The desire to improve or balance the natural functions of the digestive system reflects a growing trend in which people treat their bodies like ecosystems. More people are seeking solutions that work with, rather than against, their bodies, as described by Mintel Trend Total Wellbeing.

Origin Almond Lemon Ginger 360° Cleanse is said to be a superfood-powered infusion that features a combination of powerful cleansing ingredients. It includes lemon and ginger, which help to stimulate digestion, and cayenne pepper, which may help to boost metabolism and improve physical endurance.



Plant-Based

September 2019

This section of the monthly update focuses on a specific food/drink category, aiming to provide you with an understanding of what's trending across **New Product Introductions**.

A year of innovation in meat substitutes & eggs, 2019

Consumers concerns about climate change and health are driving innovation, although it's imperative not to overlook the importance of protein content in recipes.

Key Opportunities (Americas)

- Replicate the meat-eating experience
- Emphasize protein content
- Promote environmental benefits

Consumers seek meat-like flavours and textures in meat substitutes

TASTES LIKE MEAT

54%

of adults in the US say that meat alternatives should closely mimic the taste of meat

MEATY TEXTURE

24%

of adults in Canada who eat meat alternatives think it should have a meat-like texture

CONSUMPTION FREQUENCY

15%

of adults in Canada eat meat alternatives a few times a month



Plant-Based

September 2019

This section of the monthly update focuses on a specific food/drink category, aiming to provide you with an understanding of what's trending across **New Product Introductions**.

A year of innovation in meat substitutes & eggs, 2019

Opportunity: Replicate the meat-eating experience

Innovating with meat substitutes that closely **mimic the taste and texture** of meat will resonate with consumers, especially **flexitarians** who are looking to reduce their meat consumption without completely sacrificing the sensory and flavour qualities of eating meat.

Burgers are the most popular meat-substitute format.

In the US, 61% of households who use meat-alternative products use burgers.



With superfoods and veggies

Don Lee Farms Superfoods Veggie Burger is an organic plant-based veggie burger made with kale, quinoa and almonds. It is free from GMOs and artificial ingredients and contains 2/3 cups of veggies per serving (US).



Chicken veggie patties

Boca The Original Spicy Chik'n Veggie Patties have been relaunched with a new pack and a new formula and are now made with non-GMO soy protein (US).



Highly nutritious patties

Nanak Veggie Burger Patties are 100% vegetarian and said to be a highly nutritional and balanced combination of vegetables, cheese, herbs and spices in a delicious patty (Canada).



Plant-Based

September 2019

This section of the monthly update focuses on a specific food/drink category, aiming to provide you with an understanding of what's trending across **New Product Introductions**.

A year of innovation in meat substitutes & eggs, 2019

Opportunity: Emphasize protein content

There are opportunities for meat substitutes to enhance and **call out** their **protein content** to tap into the popularity of high-protein foods, and temper consumer concerns that **meat substitutes may lack the protein** they believe they require.

Protein is a key selling point for plant-based purchases



In the US, 35% of adults who are seeking to add more plant foods into their diet say they need more protein in their diet, and 40% of Canadian meat-alternatives consumers say protein content is the most important quality they look for when buying meat alternatives.

In North America, 19% of meat substitute and eggs NPD in the 12 months to April 2019 features the high/added protein claim.

Dr. Praeger's Purely Sensible Foods All American Veggie Burgers contain 28g of plant protein and are made with high-quality pea protein combined with avocado oil and four different kinds of veggies.



Plant-Based

September 2019

This section of the monthly update focuses on a specific food/drink category, aiming to provide you with an understanding of what's trending across **New Product Introductions**.

A year of innovation in meat substitutes & eggs, 2019

Promote environmental benefits

Brands can tap into consumer awareness of the **environmental cost of meat production** with on-pack information that highlights the **ecological and energy savings** they are making (eg water, emission and resource) by **reducing their meat consumption**.

Plant-based meats can tap into growing environmental concerns of meat production



The category is primed to capitalise on the consumer interest in environmental concerns, with **53%** of consumers in the US saying that **plant-based meats** are better for the environment, and **20%** of consumers of meat-alternatives in Canada saying they do so for environmental considerations.

No Evil Foods features environmental and sustainable messages on-pack, like 'Protein For All. In Plants We Trust.' The brand's website contains facts and figures on the environmental benefits of a plant-based diet.

With its nod to social activist messages, No Evil's political tone is similar to the marketing of the Swedish meat substitute company, Oumph!. It's a forceful branding style that advocates a change in how consumers think about animal ingredients, and therefore has to be quite impactful.



This section of the monthly update keeps you informed on what's happening in fruit, focusing on popular and growing fruit ingredients being seen in *plant based products* launched in North America.

Emerging Plant Based Fruit Ingredients

Emerging Plant Based Fruit Ingredients	% change: Aug 2017 - Jul 2018 - Aug 2018 - Jul 2019	Total Sample
Apple Juice Concentrate	676%	13%
Blackberry	385%	9%
Cranberry	337%	16%
Blueberry	191%	12%
Fruit and Fruit Products	62%	12%
Date	29%	10%
Luo Han Guo	0%	9%
Lemon Juice Concentrate	-3%	9%
Lemon Juice	n/a	13%
Luo Han Guo Extract	n/a	9%

Innovative Plant Based Products



Cottage Cheese with Blackberries & Granola

Ingredients on pack: cultured skim milk, blackberries, water, sugar, cream, salt, cornstarch, plant based gums (guar, locust bean), natural flavors, citric acid, carbon dioxide (to preserve freshness), potassium sorbate (to preserve freshness), fruit juice concentrate (for color), xanthan gum, vitamin A palmitate, enzyme, granola (rolled oats, coconut oil, sugar, honey, brown sugar, salt, water, natural flavor)



Protein Cookie with Coconut White Chip Macadamia

Ingredients on pack: peanut butter, white chips (sugar, sustainable palm kernel oil, sustainable palm oil, natural flavor, sunflower lecithin, salt), plant protein (brown rice protein, pea protein), cane sugar, gluten free oat flour, coconut flour, vegetable glycerin, coconut flakes, macadamia nuts, Brazil nuts, gluten free oat fiber, natural coconut macaroon flavor, baking powder, xanthan gum, sea salt, sunflower lecithin, monk fruit extract)



This section of the monthly update allows you to see the top ten US *plant based products* based on highest purchase intent scores*. Purchase Intent scores are calculated based on the percent of consumers who responded that they would "likely" or "definitely would" buy these products after the price was revealed.



1

Papa Pita
Greek Pita Whole
Wheat Flat Bread
**60%* Purchase
Intent**



2

Forager Project
Organic Strawberry
Creamy Dairy-Free
Cashewgurt Yogurt
Alternative
**55%* Purchase
Intent**



3

Friendly Farms
German Style
Chocolate
Brownie Flavored
Whole Milk Quark
**52%* Purchase
Intent**



4

Gardein
Mandarin Orange
Crispy Chick'n
**48%* Purchase
Intent**



5

Gardein
Seven Grain
Crispy Tenders
**47% Purchase
Intent**



6

Gardein
Mandarin Orange
Crispy Chick'n
**45% Purchase
Intent**



7

Mayfield
Creamery
Signature Vanilla
Premium Ice
Cream
**45% Purchase
Intent**



8

Manitoba Harvest
Hemp Foods
Hemp Yeah!
Organic Dark
Chocolate
Granola
**43% Purchase
Intent**



9

Dairy Pure Mix-
Ins
Cottage Cheese
with Pineapple
**43% Purchase
Intent**



10

Nestlé Coffee-Mate
Natural Bliss
Caramel Flavoured
Almond Milk
Creamer
**42% Purchase
Intent**