

Consumer's Move to Plant-based Diets

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- ❖ Plant Based Diets
- ❖ Consumer Needs & Motivations
- ❖ The Market
- ❖ The Nutritional Opportunity

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Moving to a Plant-Based Diet

Nutritional Benefits

- Increase F&V
- Increase Fibre
- Reduce Cholesterol

Nutritional Watchouts

- Protein intake & Quality
- Vitamins; B12
- Minerals; Iodine, Iron & Calcium

The Quality of Plants



Protein Source	PDCAAS	Limiting EAA
Milk	1.0	None (complete)
Egg	1.0	None (complete)
Meat	0.9	BCAA (Leucine/Isoleucine)*
Soy	0.9	Methionine/Cysteine
Pea	0.5	Methionine/Cysteine
Rice	0.5	Lysine
Wheat	0.4	Lysine

Soy protein is a high quality source of protein and a good alternative to meat based proteins

*PDCAAS - Protein Digestibility Corrected Amino Acid Score

*BCAA – Branched Chain Amino Acids

Source: Schaafsma, 2000

Plant-Based, Being Adopted Globally

Eat Well

Oils and Fats

Water

Milk and Alternatives

Vegetables and Fruit

Grain Products

Meat and Alternatives

BUILD A HEALTHY MEAL. Use the Eat Well Plate

LEARN MORE AT: Canada.ca/foodguide

Health Canada Santé Canada

Choose MyPlate.gov

Fruits

Grains

Vegetables

Protein

Dairy

HEALTHY EATING PYRAMID

HEALTHY FATS

MILK, YOGHURT, CHEESE & ALTERNATIVES

LEAN MEAT, POULTRY, FISH, EGGS, NUTS, SEEDS, LEGUMES

GRAINS

VEGETABLES & LEGUMES

FRUIT

ENJOY HERBS & SPICES

CHOOSE WATER

Limit salt & added sugar

Enjoy a variety of food and be active every day!

Nutrition Australia

Eatwell Guide

Check the label on packaged foods

Use the Eatwell Guide to help you get a balance of healthier and more sustainable food. It shows how much of what you eat overall should come from each food group.

Each serving (150g) contains:

Energy (kcal)	200	300	400
Low	Medium	High	Very High
13%	4%	7%	35%

of an adult's reference intake

Typical values (per 100g) 100kcal 160kcal

Choose foods lower in fat, salt and sugars

Choose wholegrain or higher fibre versions with less added fat, salt and sugar

Water, lower fat milk, sugar-free drinks including tea and coffee all count.

Limit fruit juice and/or smoothies to a total of 150ml a day.

Per day: 2000kcal (woman), 2500kcal (man) = ALL FOOD + ALL DRINKS

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*Source: [IrishTimes Article](#)

The Evolving Plant-Based Consumer



Vegan

Although gaining a lot of traction online, a small percentage of the population generally motivated by animal welfare concerns

Motivators

1. Animal Rights Concerns
2. Environmental Concerns
3. **Health Benefits**



Vegetarian

A larger consumer group than those that lead a vegan diet, the vegetarian community has seen growth but is still relatively small.

Motivators

1. Animal Rights Concerns
2. **Health Benefits**
3. Environmental Concerns



Flexitarian

The flexitarian consumer group holds the largest opportunity for growth, this consumer group eats both plant-based and animal based products

Perception

Plant-based proteins to be moderately **healthier** than meat

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The Two Sides Of The Flexitarian

Centennial Flexitarian

Don't want a product that is pretending to be something it is not. They want a vegetable inspired, natural offering.



Reluctant Reducer

Wants a characteristic meat eating experience using plant-based sources.

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**Source: Kerry Proprietary Research, Kerry Consumer First 2019, Kerry Consumer Compass 2019*

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Plant-based Food in Foodservice

Kerry Foodservice conducted research in an effort to uncover existing trends, activity and attitudes towards plant-based food in foodservice.



957

Consumers



6 COUNTRIES

UK, France, Germany,
Spain, Finland, Sweden

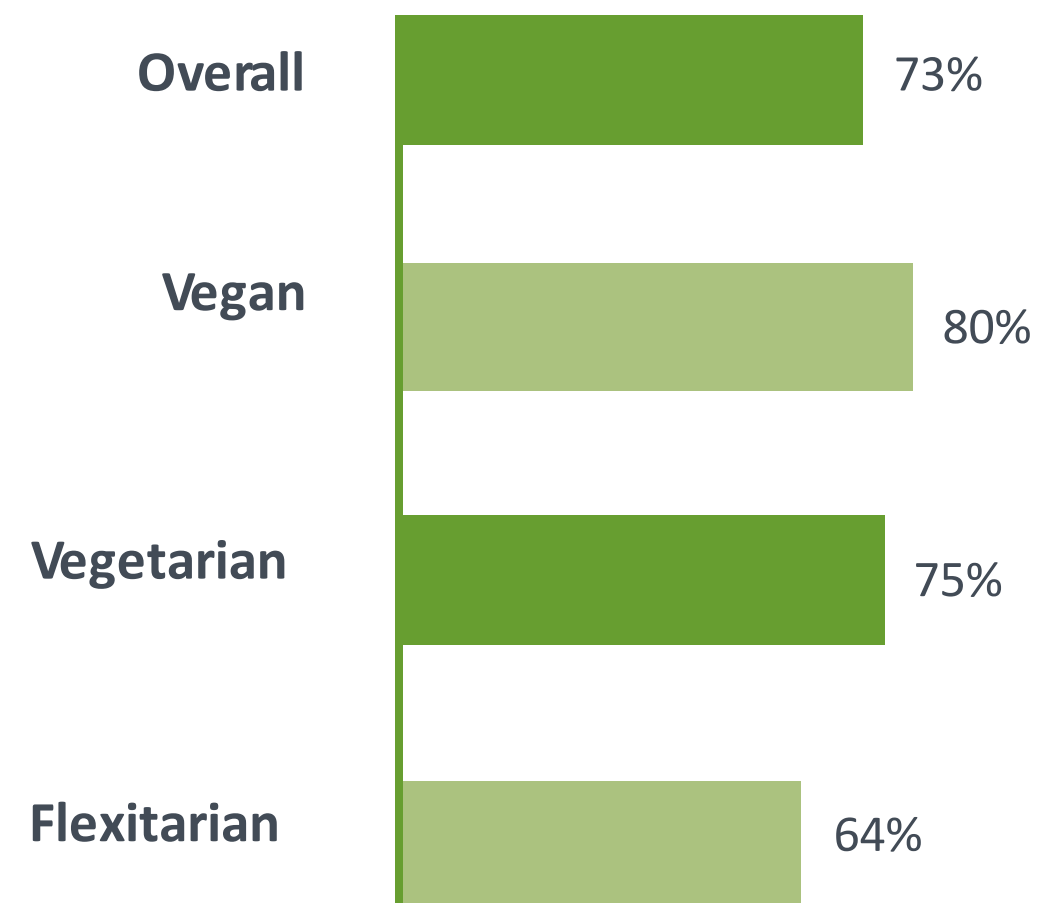


Vegans
Vegetarians &
Flexitarians

Is Plant-based Healthier?

The overall majority (73%) of respondents believe plant-based proteins are healthier than meat proteins. This perception is promoting the consumption of plant-based diets amongst meat eaters and driving the demand for more variety on menus.

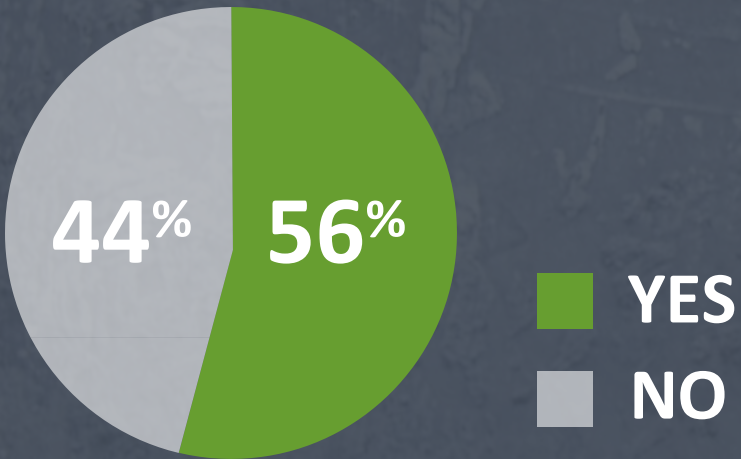
Q Do you perceive plant-based proteins to be healthier than meat proteins?



56% of European consumers are seeking to increase protein in their diet.

For vegetarians, vegan and flexitarians; plant-based food is the primary source they seek to obtain protein from, followed closely by meat alternatives.

Q. Are you seeking to increase protein in your diet?



Q. From which of the following sources do you primarily intake those increased protein levels?

1. Plant Protein (56%)
2. Meat Alternatives (44%)
3. Dairy Products (33%)
4. Protein Bars (31%)
5. Protein Powders (30%)



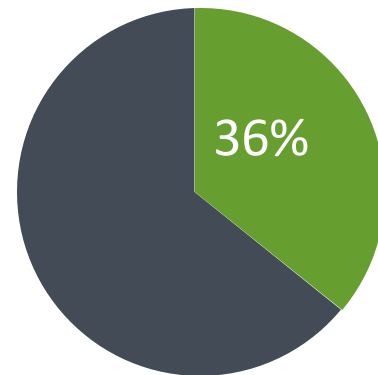
Animal Protein Consumption

The role of animal protein is still important in the foodservice arena. Flexitarians indicate that 36% of their total meals per week include meat; 54% contain animal products (e.g., Cheese, Milk, Eggs, etc.). When eating out-of-home, both flexitarians and vegetarians consume fewer animal products than they typically do when eating at home. However, flexitarians are more likely than usual to consume meals that contain meat when eating outside of home.

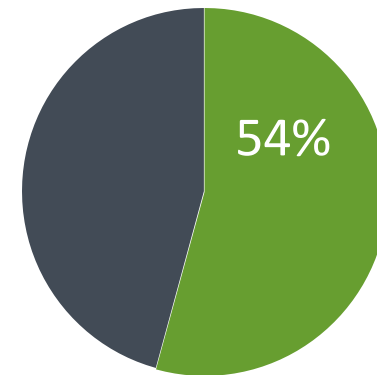


Flexitarians
(N=317)

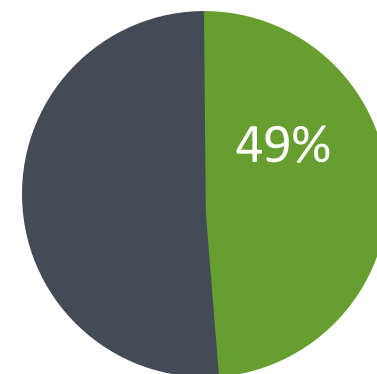
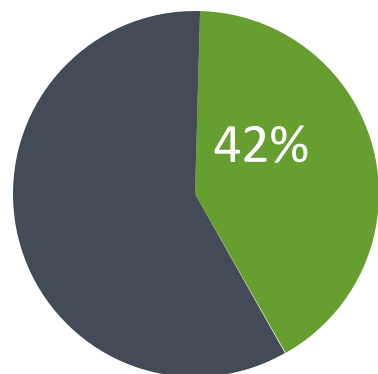
Meat
included



Animal products
included



Total
Meals

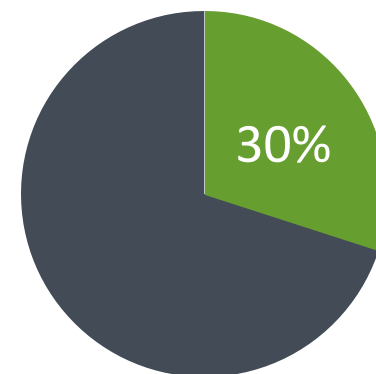
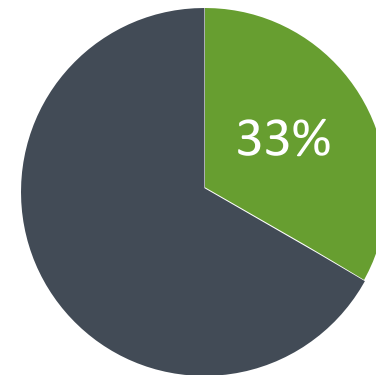


Outside
of Home



Vegetarians
(N=338)

Animal products
included



Encouraging the Consumption of Plant-based Food

As health continues to be a primary driver for leading a plant-based diet, consumers are seeking meat alternatives with better health benefits (46%), and a protein content that mirrors meat (35%).

Q Which of the following might be most encouraging to get you to eat meat alternatives (such as tofu, soy, quorn, etc.)?

1. Improved Health Benefits
2. Similar Protein Content to Meat
3. Less Expensive Than Meat
4. More Exciting Flavours Than Meat
5. Tastes Similar To Meat
6. Has Similar Texture to Meat
7. Contains Recognisable Ingredients



Read All About It!

'Avoid solving one problem by creating another': Plant-based boom faces sustainability and nutrition challenges

By Katy Askew [↗](#)
17-Oct-2019 - Last updated on 25-Oct-2019 at 05:48 GMT



'Now we need to create healthier meat analogues': scientist

By Oliver Morrison [↗](#)
09-Dec-2019 - Last updated on 09-Dec-2019 at 15:26 GMT



Nutritional value of dairy alternatives 'misleading'

By Aidan Fortune
08-Mar-2019 - Last updated on 08-Mar-2019 at 17:25 GMT



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Market Case Study

Burger Nutritionals

Nutritionals	Beef Burger Per 113g	Average Market Product Per 113g	
Protein	20g	20g	-
Calories	231kcal	261kcal	↑
Fat	16g	17.3g	↑
Saturated Fat	7.3g	8.9g	↑
Salt	0.4g	1.1g	↑



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Market Case Study

Burger Ingredient Declaration

Beef Burger	Market Product Example
100% Beef	Pea Protein, Wheat Protein, Soy Protein, Mushroom, Onion, Beetroot, Coconut Oil, Oats, Barley, Soy Protein Isolate, Gluten (wheat), Flour (wheat), Malt, Methylcellulose, Salt, Vinegar, Natural Flavour, Lemon Juice, Ascorbic Acid, Lactic Acid, Vitamin B12




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Winning In Plant-Based In Foodservice

 Improved Health Benefits

 Protein Quality

 Value For Money

 Exciting Flavour

 Full Meat Taste Experience

 Recognisable Ingredients

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Thank You



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