

# The Evolution of Plant-Based: Eating and Beyond

March 2022

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## INTRODUCTION

Scope

Key findings

## PLANT-BASED: EAT IT, WEAR IT, USE IT

Companies are increasingly communicating vegan, vegetarian and plant-based claims

Plant-based grows beyond food and beverages

For food, motivation is primarily linked to health

Beauty and personal care purchase motivations fit plant-based

Case study: Vedix uses AI to create customised plant-based beauty products

Demand for natural fits plant-based apparel profile

Case study: Spiber Inc produces vegan “silk” and “wool” out of “Brewed Protein”

Plant-based packaging works for biodegradable demand

Case study: Footprint rolls out plant-based packaging solutions for supermarkets

## EXPANSION CONTINUES THROUGH PACKAGED FOOD

The plant-based food industry continues to evolve with strong prospects ahead

A trend spread across the entire food spectrum

Danone focuses on replicating milk’s sensorial experience to overcome the taste challenge

Plantish takes plant-based seafood to the next level through 3D printing technology

## CONSUMER FOODSERVICE IS AT AN INFLECTION POINT

Plant-based alternatives reach the mass market through limited-service restaurants

Flexitarianism driving growth of meatless options in limited-service

Full-service restaurants return to in-person dining amid the boom in plant-based foods

Yum! Brands brings plant-based meat alternatives to the masses

London fine dining restaurant Gauthier Soho makes a plant-based post-COVID return

## DRINKS SEEK PLANT-POWERED SOLUTIONS

Plant-based claims signify natural ingredients and cleaner labels in beverages

Plant-based, low-calorie alternative sweeteners key to reduced sugar innovation

Herbs, mushrooms and opportunities in plant-powered functional beverages

Athletic Greens: Plant-based nutrition drinks in a convenient concentrate format

Riot Energy: Building a natural energy drink and bringing new consumers to the category

## HEALTH AND BEAUTY SEES A REACTION TO THE CHEMICAL STATUS QUO

Long-standing and emerging plant-based options in consumer health

Plant-based claims are increasing considerably

VoltaNatura: Power brand leading the reformulation to plant-based in OTC

Orgain Sport: Plant-based having its moment in sports nutrition

Plant-based ingredients increasingly desired across beauty and personal care

Garnier: Mass skin care goes plant-based

Love Beauty and Planet: Telling a brand’s story through plant-based ingredients

## HOME CARE FACES BARRIERS – BUT ALSO OPPORTUNITIES

Efficacy and commoditisation restrict potential of plant-based ingredients

The broader topic of sustainability is convoluted and its interpretation subjective

EU Green Deal sets out to establish industry legislative standards

New regulations could bring substantial change

Plant-based’s palm oil conundrum: Is the most sustainable crop sustainable enough?

Only a small proportion of palm oil production verified as sustainable

Probiotics offer a credible solution to looming health vs efficacy battle

Beauty and personal care parallels point the way for probiotics

Reckitt first multinational to trial line of probiotic cleaning products

Croda produces 100% bio-based range of surfactants in the US

## WHAT'S NEXT FOR PLANT-BASED

Plant-powered lifestyles move beyond dietary choices

Food: Challenges and innovation loom – as does non-animal but not plant-based

Foodservice will see further plant-based democratisation and sustainability positioning

Plant-based will increasingly fit beverage consumers' preferences

Transparency, functionality and sustainability for health and beauty

New solutions needed in home care as plant-based demand will grow

Key takeaways

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