

# 2017 INTERNATIONAL PLANT STUDY

## Consumer Entry Points in Plant-Based Eating & Drinking

### *Detailed Outline*

#### ➤ Background:

The HealthFocus *International Plant Study* takes an in-depth look at various aspects of the plant-based eating and drinking trend including things shoppers want more of—like plant-based foods, beverages and ingredients—and meat, dairy and other animal products they are cutting back on.

#### ➤ Countries Covered:

- USA, Brazil, Mexico, Sweden, Russia, UK, Australia, China, and India

#### ➤ Report Outline

- Study Overview
- Methodology
- Summary and Opportunities
- International Market Overview (*includes global and individual country data*)
  - Opportunity
    - In which markets are shoppers:
      - Increasing plant?
        - Are they increasing their consumption of plant-based foods, plant-based beverages and added plant-based ingredients?
      - Decreasing animal?
        - Are they avoiding animal products—including red meat/pork, chicken/poultry, fish/shellfish, dairy products, or eggs?
      - Eating plant-based but are not vegetarian?
    - How does the plant-based trend rank globally and is this a fleeting trend?
  - Target Shoppers
    - Which age group is most likely to participate in the plant-based trend?
    - What influences millennials to maintain plant-based diets?
  - Trend Drivers
    - What is driving the trend towards plant?
      - Daily living reasons (e.g., clean eating, safety, energy, digestion, etc.)
      - Health reasons (e.g., preventing illness, living longer, heart health, etc.)
      - Social reasons (e.g., sustainability, environmental impact, animal treatment, influence from peers, lifestyle preference, etc.)
    - How do motivations compare by age group?
      - Which drivers are similar across different generations?
    - Have they experienced a positive health impact from using plant or plant-based ingredients in foods? What about in beverages?
  - Demand For Plant-Based

- Which types of added plant products are most in demand (e.g., foods, beverages, snacks, or supplements)?
- Plant-based vs. animal
  - Do shoppers think plant-based foods/beverages are healthier, safer, better for the environment, more nutritious, fresher, better quality, or better tasting than animal-based foods/beverages?
  - How important is it that their food choices include plant-based ingredients? How important is it that their food choices don't include animal-based ingredients? What about their beverage choices?
- Attitudes & actions:
  - Do they want to include more plant-based foods in their diet? What about plant-based beverages?
  - Are plant-based foods/beverages worth paying more for?
  - Does including more plant in their diet make them feel healthier?
  - Do they think plant-based ingredients are fun and interesting?
  - How often do they choose for added plant-based ingredients in: foods, beverages, and supplements?
  - How often do they choose non-dairy based beverages like almond or soy milk instead of dairy milk?
- Availability
  - How easy is it for shoppers to access ready-made, fresh, plant-based meals? Is there a demand for these types of meals?
  - Who does not have access to fresh fruits and vegetables?
- Information sources
  - Where do they receive the most useful information about plant-based diets (e.g., food labels, friends, internet, retailers, etc.)?
- Plant-based snacking
- Plant-based supplements
- Changes in Use
  - Plant addition, not replacement
    - Plant as an addition: Have they added plant-based foods ON TOP of other foods they are eating? What about in beverages?
    - Plant as a replacement: Have they replaced other foods with plant-based foods? What about in beverages?
  - Reducing animal and increasing plant
    - In which markets are more shoppers increasing their use?
    - How long have they been increasing plant?
    - How long have they been decreasing animal?
    - Importance of maintaining taste
- Barriers
  - What prevents people from buying more plant-based products (e.g., taste, availability, price, changing habits, convenience, concerns about nutritional sufficiency, etc.)?

- What are the reasons they continue to use animal products?
- Protein Sources
  - Are they interested in getting protein from plant-based sources?
    - Who is interested?
  - Factors driving purchases of plant-based proteins
  - Opportunities for protein sources
    - Health ratings and usage for 20+ protein sources including plant-based sources (e.g., beans, legumes, seeds, almonds, peas, quinoa, coconut, etc.) and animal-based sources (e.g., eggs, dairy, fish, etc.)
- Category User Opportunities: Food/Beverage Categories
  - Where is adding plant important?
    - In which categories do customers think it is important to have added plant-based ingredients? (30 food/beverage categories evaluated)
  - Paying a premium for plant
    - In which categories are customers willing to pay more for added plant-based ingredients? (30 food/beverage categories evaluated)
    - How much more will they pay (5%, 10%)?
  - Total market calculations
    - % of the total market population that uses and finds added plant-based ingredients at least somewhat important in the product category
    - % of the total market population that uses and finds added plant-based ingredients important in the product category and would be willing to pay 5-10% more for it
  - Opportunities
    - Milk alternatives
      - Health ratings and changes in use for different types of milk (e.g., almond milk, soy milk, rice milk, oat milk, etc.)
      - Which milks are considered to be healthier?
      - Which milks are they increasing use of?
    - Plant ingredients
      - Health ratings and changes in use for various plant ingredients (e.g., lentils, chia seeds, chickpeas, seaweed, coconut, etc.)
      - Which ingredients are considered to be healthier?
      - Which ingredients are they increasing use of?
- Optional Country Detail Add-On
  - Includes total combined country data alongside data for each individual country ordered for all questions in the International Market Overview section
  - To order, please contact HealthFocus International at [info@healthfocus.com](mailto:info@healthfocus.com)