



schouten specialist in
plant-based protein

Our latest plant-based
market insights for you

May – June 2022

In this update:

- In the last update of 2021 we shared the most important food trends for 2022.
- Now we review what's happening in the plant-based assortment related to these food trends.



Throwback: the four most important food trends.

1. Shared planet

For the first time in history, global consumers are **more concerned about the planet** than about their health.



2. Plant-based

Health remains the most important driver behind the increased popularity of plant-based food.



3. Shifting occasions

Existing eating moments have **changed** and **new ones** have been formed.



4. Amplified experiences

Accelerated by pandemic, consumers are hungry for **new food experiences**.

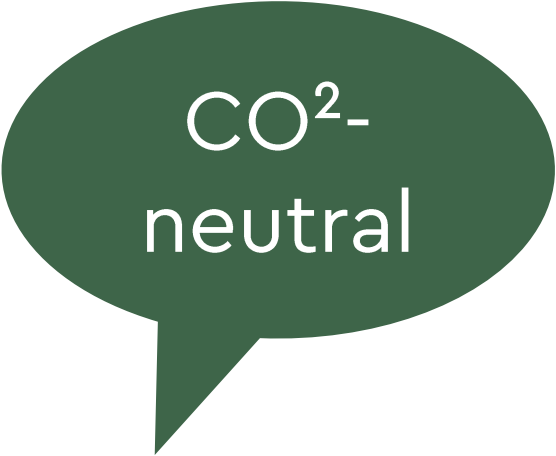


1. Shared planet



Shared planet: focus on sustainability

Food suppliers respond to the increased environmental concern in different ways:



CO²-
neutral

Environmental claims



Sustainability score

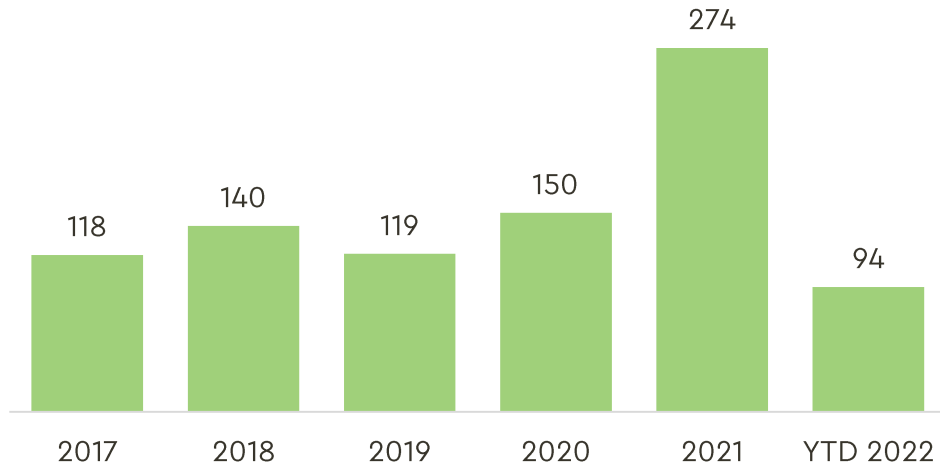


Local

Environmental claims

The amount of launched meat substitute containing an environmental claim increases strongly.

#launches in meat substitutes with an environmental claim



Some examples



VS, March 2022



UK, January 2022



Germany, April 2022

Sustainability scores

Next to ratings for health (e.g. Nutri-Score) we now see more and more ratings for environmental impact as well.



Eco-Score was developed in France and rates food with an environmental score of A to E. Last year, this method was already tested by, among others, Lidl & Colruyt.

Eco-Score's European expansion: Lidl and Colruyt adopt environmental footprint labelling

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Leading in knowledge

Eaternity Score

Precise assessments for your food's environmental footprint.



The **Eaternity Score** originates from Switzerland and rates 1, 2 or 3 stars on four different indicators of environmental impact.



Veganz is an example of a plant-based brand that puts this score on their products.



Local

We see more and more examples of products that claim to be produced locally, at least partially.



Sweden, March 2022



Canada, February 2022



South Africa, December 2021



Netherlands, February 2022

A bit nuance is needed though:

‘Made in France’ lang niet altijd in Frankrijk gemaakt

02-05 | Food | Nieuws



Foto: Canal+ Greenpost

‘Made in France’ does not necessarily mean that it is really made in France.



1 mei 2022

Nederlandse veldboon te duur: ‘We zijn er niet om het inkomen van de boer te regelen’

Dutch fava bean too expensive, driven by the local climate.

2. Plant-based & health



Plant-based: health the most important driver

Food suppliers anticipate towards health of plant-based products in different ways:

Gemiddelde voedingswaarde

	per 100 g	per 90 g	RI*
Energie	kJ 831/kcal 198	kJ 748/kcal 178	9%
Vetten	7,6 g	6,8 g	10%
waarvan verzadigde			
vetzuren	2,1 g	1,8 g	9%
Koolhydraten	8,4 g	7,6 g	
waarvan suikers	5,6 g	5,0 g	6%
Vezels	3,5 g	3,2 g	
Eiwitten	22,3 g	20,1 g	
Zout	1,68 g	1,51 g	25%
Vitamine B12	0,44 µg (17%**)	0,39 µg (15%**)	
Ijzer	6,2 mg (44%**)	5,5 mg (39%**)	

* RI = Referentie-inname van een gemiddelde volwassene (8.400 kJ/2.000 kcal).

** Percentage van de aanbevolen dagelijkse referentie-inname voor volwassenen.



High in
protein

Nutritional values

Changing ingredient
focus

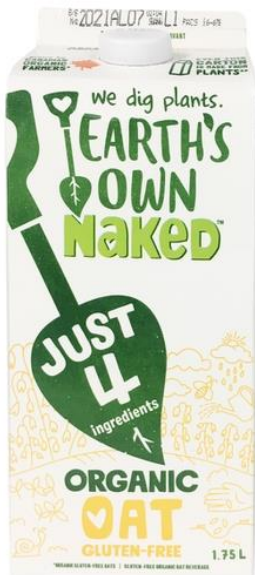
Health claims

Nutritional values

There are different level in the approach of nutritional values in plant-based products.

Inherent nutrition

Less is more approach;
no health benefits beyond inherent
nutrition from key ingredients.



Canada, Mar 2021

Ingredients:

- filtered water
- gluten-free oats
- sea salt
- amylase

Enhanced nutrition

Aimed at mimicking; reaching
similar nutritional value compared
to its animal-based counterpart.

South Korean plant-based market challenger enters



"Enjoy the savory taste and flavor of
cheddar cheese - but without the milk"

United States, Feb 2022

Superior nutrition

Aimed at optimizing; reaching
better nutritional value compared
to its animal-based counterpart.



- 1L Milk
- 8g Protein per Serving
- 50% more calcium than cow's milk
- Added vitamins B12, D & Iodine



United Kingdom, Feb
2022

Changing ingredient focus

Next to that we see more and more focus on nutrient-dense ingredients.

Growing appetite for fungi

From familiar favorite to star ingredient



food ingredients 1st

22 Dec 2021

"US-based start-up Meati strives for fungi domination in plant-based arena"



food ingredients 1st

28 Feb 2022

"Bosque Foods unveils first mycelium-based pork and chicken options"



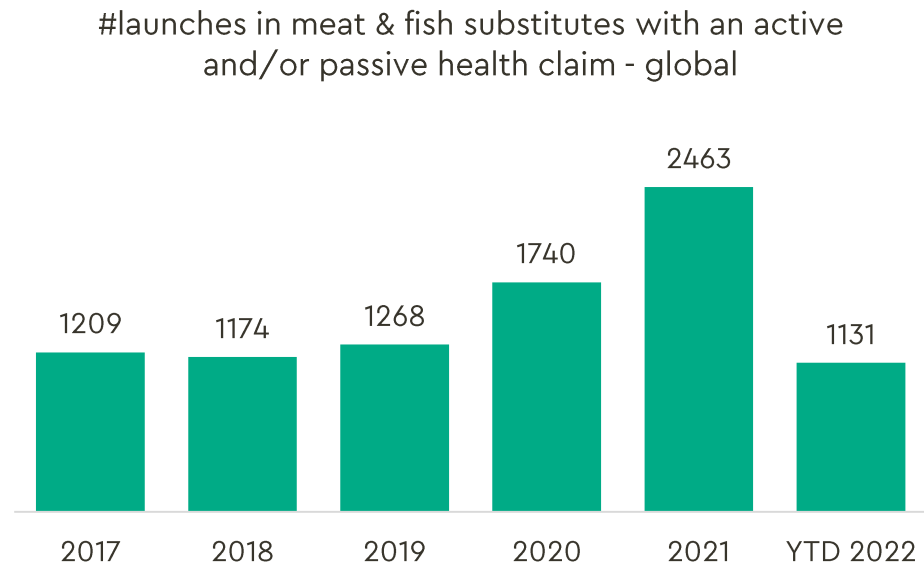
United States, Jan 2022



THERE'S A NEW
VEDGE IN TOWN
AND IT'S THE
ARTICHOKE

Health claims

The number of plant-based meat & fish substitute launches with a health claim is increasing strongly.



VS, January 2022

Some examples



Australia, December 2021



Belgium, April 2022

3. Shifting occasions



Shifting occasions: consumption moments are changing

On the one hand, we see an enriched eating moment, consumers are creating a more festive moment @ home.

Experience restaurant quality @ home

More and more food service inspiration in retail.

Quorn Debuts Chef-Created Meal Kits & Environmental Documentaries

April 6, 2022

Products & Launches



© Quorn



England, April 2022



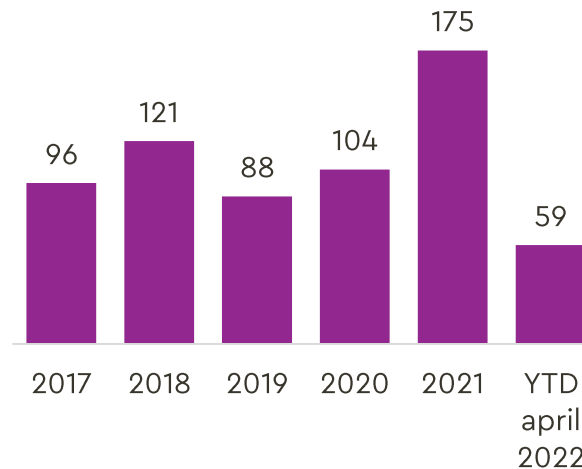
Netherlands, April 2022

Shifting occasions: new consumption moments are formed.

Breakfast



Deli meat substitutes are already available for a long time, however we see a clear increase in the number of launches in this segment.



Europe, January 2022

4. Amplified experiences



Amplified Experiences: premium & indulgent are gaining turf.

The time that plant-based products are purely functional (replacing animal protein) is definitely behind us.

+46%

growth in food and beverage launches with a **plant-based** and a **premium & indulgent** claim
(Global, 2018 vs. 2021)

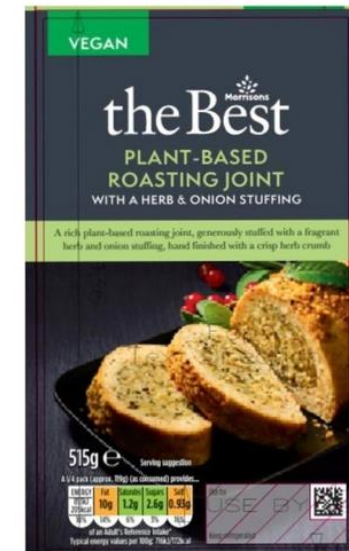
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Leading in knowledge

Some examples



Artisanal looking products with a literal **premium claim**.
USA, August 2021



Premium private label with **luxurious appearance**
England
December 2021



Plant-based cheese with an **'enjoy'-claim**
Germany
August 2021

Amplified Experiences: potential for surprising innovations.

Although plant-based is innovative by itself, there are still lots of opportunities for surprising new products.



Vegan caviar
Netherlands
March 2022



Mixes to create plant-based products yourself
England, March 2022



Trends from other categories, Kombucha in this case, applied to plant-based.
France, December 2021



New flavour combinations like roast beef with broccoli, cauliflower and cheese.
Sweden, February 2022



Summary

Summary

1. Shared planet

The role of **local production** & **environmental impact** is becoming more and more important.



2. Plant-based

Looking at **health**, we need to look for a balance between good nutritional values and a clean label.



3. Shifting occasions

Plant-based goes beyond the traditional dinner, lots of potential at **all consumption moments**.



4. Amplified experiences

Plant-based is no longer just functional, but can surely also be about **premium** and **indulgent**.



What now?

1

The focus on **less processed** and **more sustainably produced** will increase the next few years. This offers potential for non meat analogue products (e.g. vegetable burger or tempeh) but also for innovative products that mimic meat but are less processed and have less environmental impact.

2

Plant-based is no longer just functional and meant to be for traditional dinner.

Future innovations should therefore focus on **premium** and **alternative consumption moments**, like snacking or next to a drink.



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Questions? Feel free to reach out.

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