FORWARD FOOD

PLANT-BASED TOOLKIT FOR RETAIL

PREPARED BY
HUMANE SOCIETY INTERNATIONAL/CANADA

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FRIENDS OF HUMANE SOCIETY INTERNATIONAL

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NeONBRAND, @neonbrand /Unsplash

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Bringing Food Forward

Thank you for downloading this Forward Food Toolkit. In case you are not already familiar with our work, Forward Food is a non-profit program of Humane Society International/ Canada aimed at creating a more sustainable future for the foodservice industry. We work to put more plants at the centre of the plate, where they belong, benefitting animals, the planet, and our health, as well as usually reducing food costs.

This toolkit is one of several free-of-charge resources that we offer to the food industry. We hope it is helpful and encourage you to reach out if you have any questions or comments. Otherwise, we wish you the best of luck in transitioning your business to be more plant-forward. It will have a big impact on the health of your customers, the environment, and the animals we share it with.

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Defining Plant-Based

Plant-Based

A food item consisting entirely of foods derived from plants, including vegetables, grains, nuts, seeds, legumes, and fruits, and with no animal products (meat, dairy, honey, eggs, fish, etc.). This also includes other animal-derived ingredients, such as dyes and pigments, as well as any ingredients that are tested on animals.


Amy Webster/The HSUS

Plant-Forward

A food item that puts plants at the centre of the plate, without completely eliminating animal derived products (meat, dairy, honey, eggs, fish, etc.). An example of this would be meatloaf that is 60% mushrooms. These dishes can align well with Canada's Food Guide, which recommends that 7/8 of our plates are filled with plants (1).

Why Plant-Based?

Consumer Demand

Consumers are looking for more plant-based options! In fact, over 40% of Canadian consumers are actively trying to incorporate more plant-based foods into their diets (2).

Market Trends

Over half of Canadians want to reduce their meat intake (3). People under the age of 35 are three times more likely to be vegetarian or vegan than people 49 or older (4).

Consumer Health

The new Canada Food Guide encourages increased consumption of plants because diets rich in vegetables, fruits, whole grains, legumes, and nuts are consistently linked to lower obesity rates, blood cholesterol levels, and blood pressure, which reduces the risk of heart disease, certain cancers, type 2 diabetes, and more (5). In fact, 75% of Millennials are eating less meat for health reasons (6).

Sustainability

Animal agriculture is one of the top contributors to global environmental problems, due to its vast use of water, land, and fossil fuels, and high carbon dioxide and methane emissions (7). Plant-based foods have a much lower impact on the planet (7). Replacing traditional breakfast items with plant-based options can reduce GHG emissions by 60% (8). Changing lunch and dinner menus to plant-based can reduce emissions by 85% (8).

Market Insights

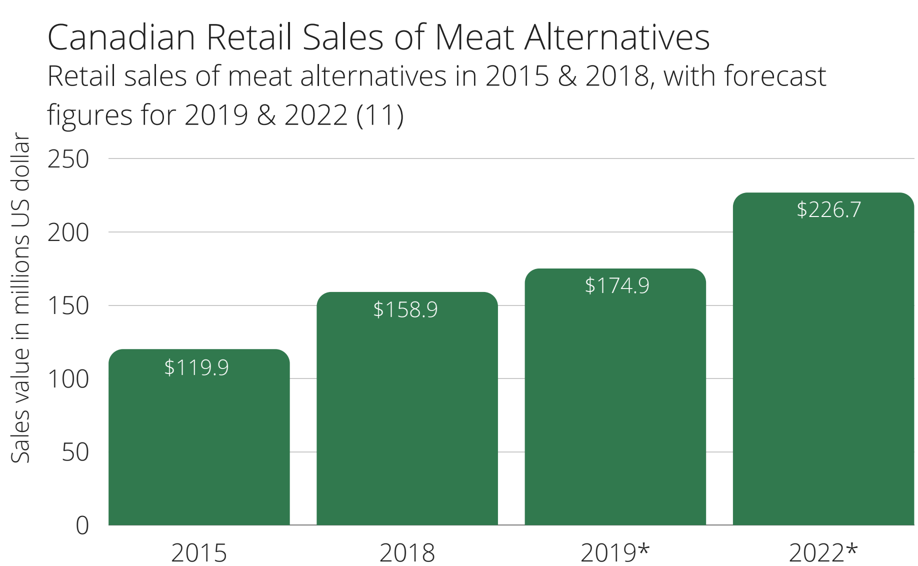
Plant-based options represent a fast-growing segment that is projected to be increasingly important in Canadian and global retail markets.

Amy Webster/The HSUS

Globally, sales of plant-based proteins have had **an average annual growth of 8% since 2010** (2). The plant-based beverage market, meanwhile, has grown **33% annually over the past five years** (2). Canadian sales of plant-based protein products similarly grew by **7% in the 2016/17 fiscal year**, bringing them up to **more than $1.5 billion** (2). While the Canadian population grew by 1.4%, Canadians bought **4% less meat (in kilograms) from 2017 to 2019** (9). Currently **more than 40%** of the Canadian population is actively seeking to increase the amount of plant-based foods in their diet (2).

Looking to the future, the market for more sustainable proteins — namely plant-based and cell-based proteins — is expected to **begin growing by 14% annually by 2024** (2). The COVID-19 pandemic has only accelerated the already fast-growing segment due to the consumer perception of these products as rich sources of nutrients and immunity boosters. The plant-based dairy market is expected to **reach $34 billion by 2024** whereas the global plant-based protein market is expected to **reach $14.32 billion by 2025** (9, 10). For more information, see "Change in Consumer Behaviour Due to COVID-19".

As a result of these trends, the alternative proteins market is forecasted to **make up to a third of the global protein market by 2054** — a significant projection, considering global protein demand is expected to double to 943.5 million metric tons in this same period (2).



Evaluation of the Industry

- **Industry Competition:**
  - A broad assessment of industry competition suggests diversity and scope. Many small — as well as start-up — companies have taken steps to operate in the global plant-based food market (12).
  - Major Canadian names include Gardein Protein International, Inc., Daiya Foods Inc., and Earth's Own Food Company Inc. (12), as well as Maple Leaf Foods and Yves Veggie Cuisine (13).
  - Major American brands include Beyond Meat Inc., Impossible Foods Inc., Amy's Kitchen Inc., and Follow Your Heart (12), as well as Quorn Foods and Tofurky (13)
  - Several major plant-based companies are now publicly traded, including Beyond Meat, Else Nutrition, The Very Good Food Co., Inc., and Tattooed Chef (14). Beyond Meat, in fact, has had some noteworthy investors: as of 2019, the list included Obvious Ventures, Kleiner Perkins, Cleveland Avenue, and Bill Gates (15).

Amy Webster/The HSUS

- **New Market Entrants:**
  - Although plant-based foods are finding rousing success in the Asia-Pacific region and Europe, North America is still central to the market (13).
  - Many start-ups have marketed plant-based proteins or new vegan options in recent years, suggesting a receptive and eager audience (16).
  - Even prior to COVID-19, the industry had been steadily growing: plant-based food brands had been garnering investment from "venture capital firms and major established meat supply companies" (16).
  - The pandemic, however, has boosted consumer and market interest in plant-based products while emphasizing connections between animal agriculture and health dangers (16). For more information, see "Change of Consumer Behaviour Due to COVID-19.
  - Pre-existing — and dominant — brands such as Cargill, PepsiCo, Smithfield, and Tyson now all plan to introduce "expansions, new product launches, diversifications, and acquisitions strategies" to further join this market (16).

- **Bargaining Power of Suppliers:**
  - Suppliers find themselves in a promising position: American retail dollar sales of plant-based foods which directly replaced animal products jumped to $5 billion in 2019 — an 11% hike. More than 208 million units of plant-based meat were sold, accounting for 2% of all dollar sales for retail packaged meat. Total U.S. retail food dollar sales, however, increased just 2% (17).
  - In 2019, American plant-based milk sales grew 5% while cow's milk sales grew just 0.1% (17). It is clear that plant-based options as a whole are expanding at an ambitious rate.
  - Such market interruption has given notable power to suppliers. Significant food conglomerates have begun investing in plant-based companies; General Mills' venture capital arm, 301 Inc, for example, "has infused cash into several plant-based food brands, such as Gathered Foods, Kite Hill, No Cow, and Beyond Meat" (18).
  - In an effort to capitalize on a growing customer base, major grocery chains now stock plant-based meat products. Retailers such as Kroger, Wegmans, and Loblaw have all "launched private-label plant-based offerings" (18).

Evaluation of the Industry

Continued

- **Bargaining Power of Buyers*:**
  - Despite plant-based meals' successes, most retailers still do not offer any private-label plant-based meals (17).
  - Plant-based cheese comes in several forms, but few retailers sell a private-label version. Few, too, sell private-label plant-based yogurt — even with 40-60 plant-based products on average (17).
  - Private-label plant-based creamers, spreads, and butters also remain rare in retail locations (17).
  - Suppliers may offer products popular with customers, but retail availability is still sparser than expected. Retailers with plant-based meat lines — or those looking to expand into the industry — should start now and include varied plant-based products (17).

**American data*

Cell-Based Meat: A Food Innovation

Cellular agriculture is a field of great potential. It may dominate the field in just a few short years, offering consumers "real" meat with fewer ethical and environmental qualms.

- **Cell-Based Meat:**
  - Memphis Meats* is an example of this category (19). The company creates meat from self-producing cells (18).
  - The company claims it can produce animal-free products with just 1% of land and 1% of water required by traditional meat producers. It plans to use the gene-editing technique CRISPR to improve growing processes and environmental impacts (18).
  - As of July 2020, the company's total funding was approximately $211 million (18).
  - New Age Meats is another company endeavouring to create cell-based meat; it plans to release a sausage product by 2021 (18).
  - Biotech companies, meanwhile, seek to engineer meatlike products from methane. Calysta of California ferments natural gas for its alternative protein product, and String Bio of India uses methane for its alternative animal feed. Although these companies currently produce such alternatives for animal feed substitutes, there is a growing interest to produce methane-based protein for humans (18).
  - In late 2020, Singapore saw the world's first commercial sale of cell-cultured meat. Sold by American start-up Eat Just and served by Singapore restaurant "1880", the cell-based chicken was well received by customers (20).

Redwan Farooq/Mosa Meat

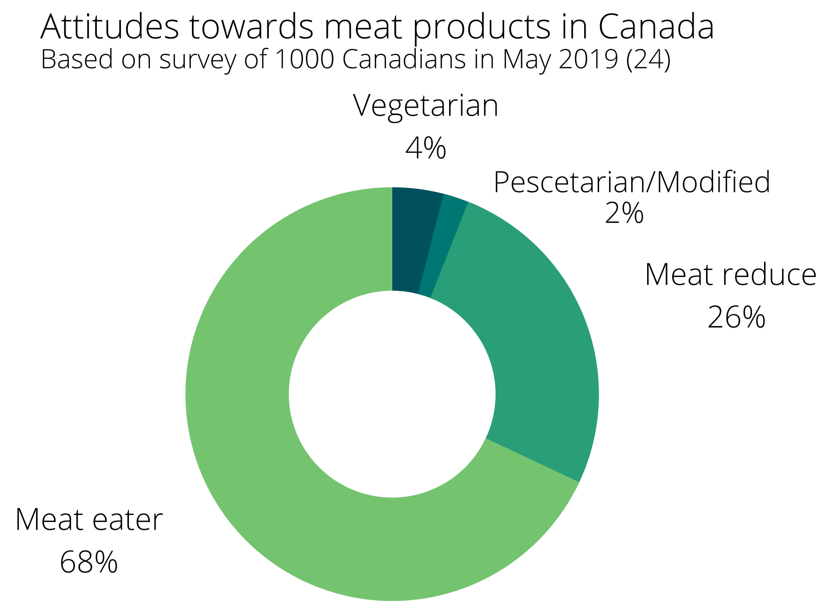
- **Other Nutrition Options:**
  - Meal replacement products — such as that of American company Soylent and its $72.4 million raised — are intended as entirely plant-based, vegan, and convenient options (21) for consumers. They offer an additional nutrition option to that of animal-based proteins.

*Memphis Meats re-branded to Upside Foods as of May 2021

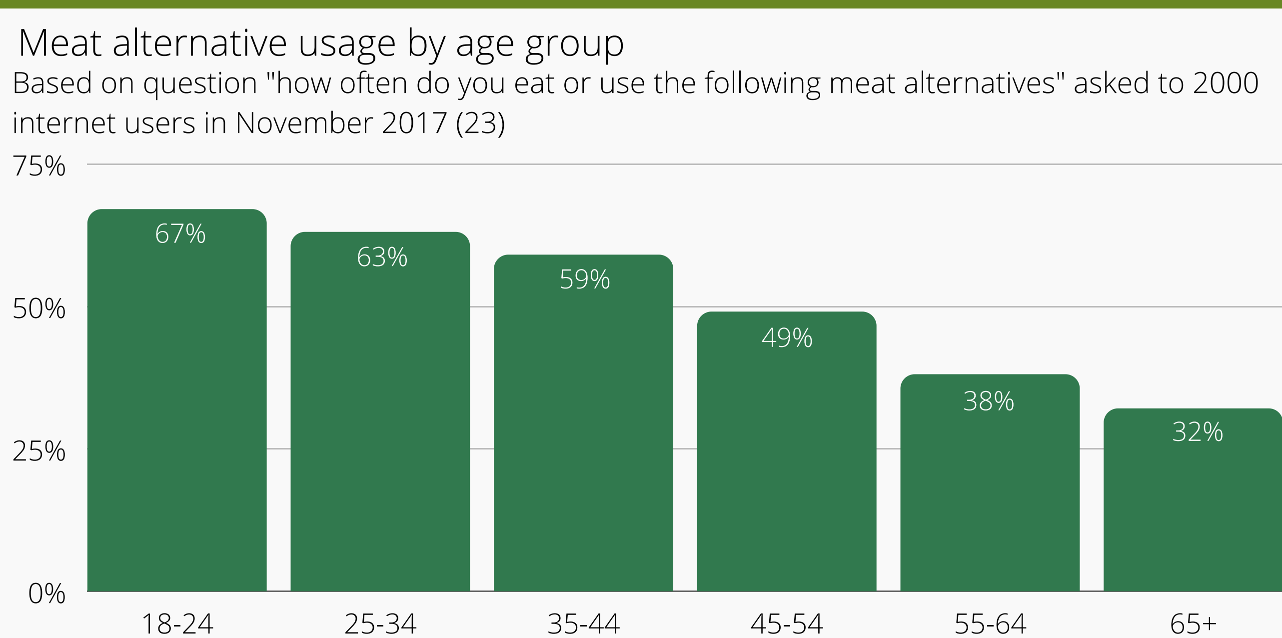
Plant-Based Consumers

Vegans and vegetarians are the main consumers of plant-based products in Canada, but they are certainly not the only ones.

While **20% of Canadian households** identify themselves as vegan or vegetarian, **27% of households (more than a quarter**) are buying plant-based meat and dairy alternatives (2). Consumers are **increasingly looking to reduce their meat intake and follow a "flexitarian" lifestyle**, one which consists mainly of plants and plant-based proteins but also includes animal products (22). **The best retail strategy thus targets both consumer bases, catering to the unique needs of each.**



Current plant-based consumers in Canada are **largely young (under 35)** and **concentrated in urban centres** (23). Notably, **British Columbia** has the highest percentage of people following a plant-based diet in the country (23). **South and East Asian Canadians** are also more likely to consume plant-based products than other groups (23).



Plant-Based Consumers

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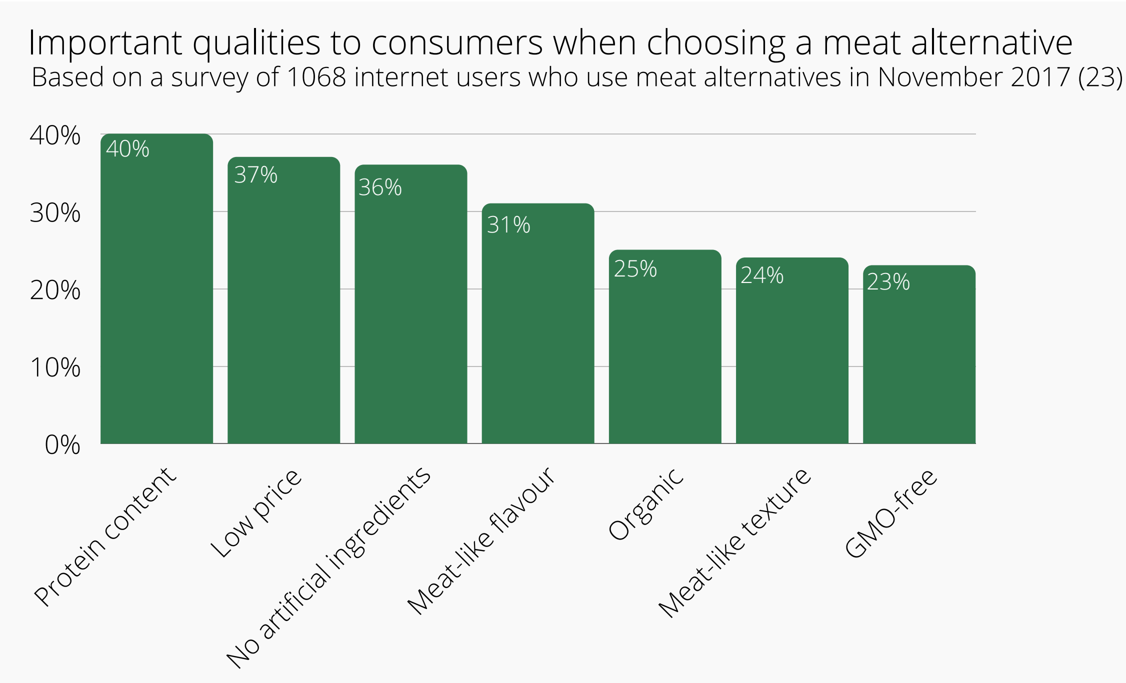
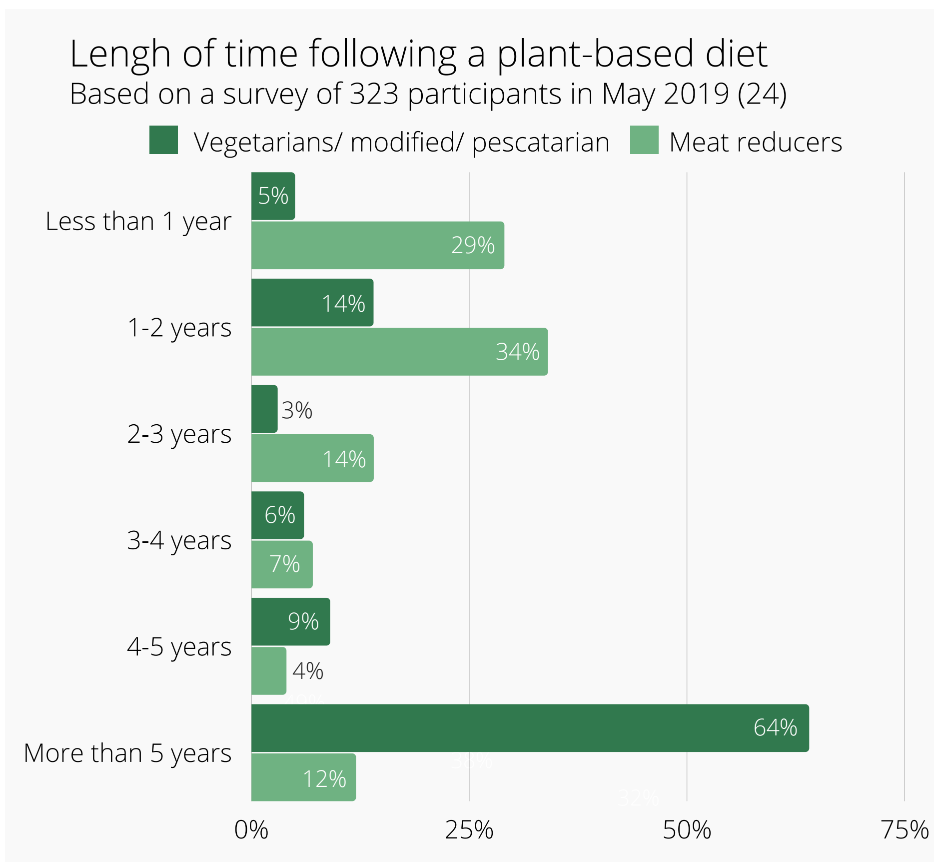


Plant-based consumers are united in looking for products with **high protein content**, **low prices,** and **no artificial ingredients**.

Flexitarians on the Rise

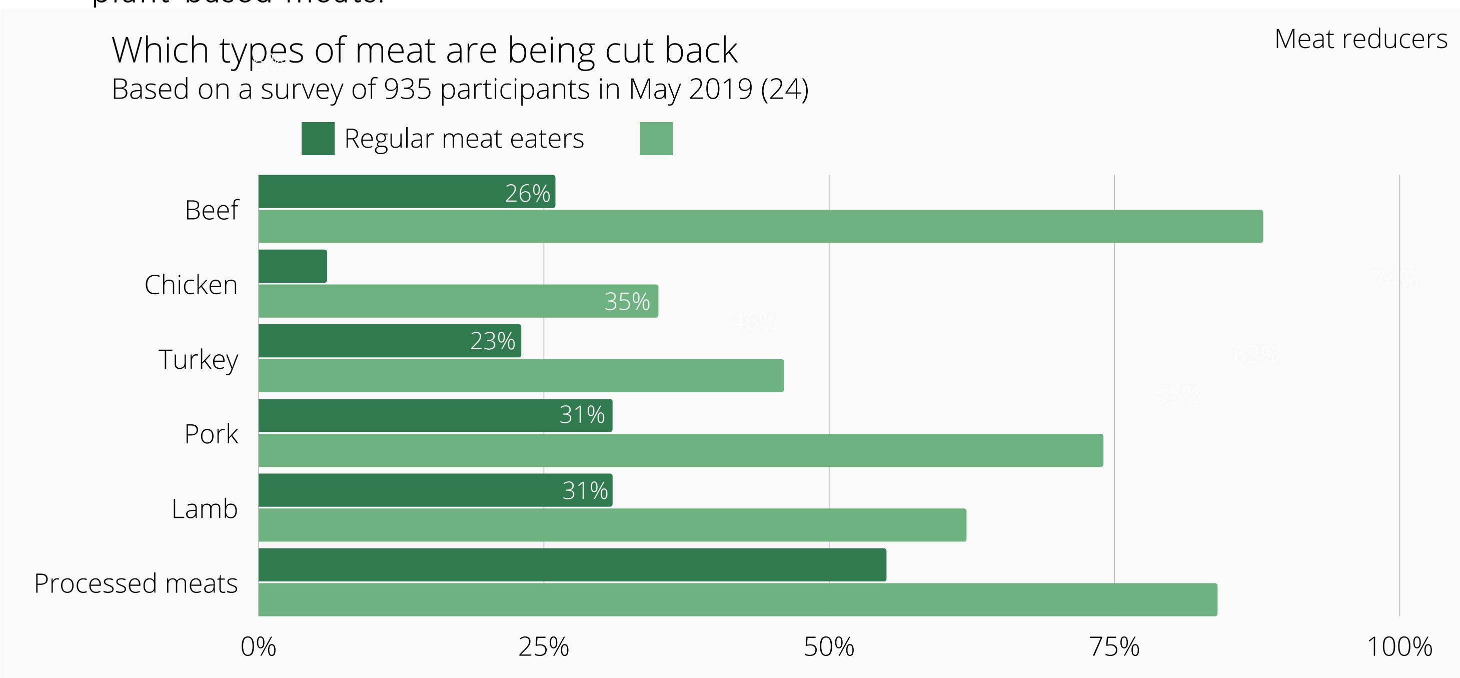
- **Growth Potential:**
  - Although vegan and vegetarian consumers are the current primary consumers, meat-reducing consumers and flexitarians represent the most growth potential for the plant-based category.
  - Meat-reducing consumers are new to the plant-based market; they are expected to continue growing as a consumer base due to rising interest in health and sustainability, the new Canadian Food Guide, and other factors (23).
  - As of 2020, the NRC notes that 40% of Canadians are actively trying to incorporate more plant-based foods in their diets (2).



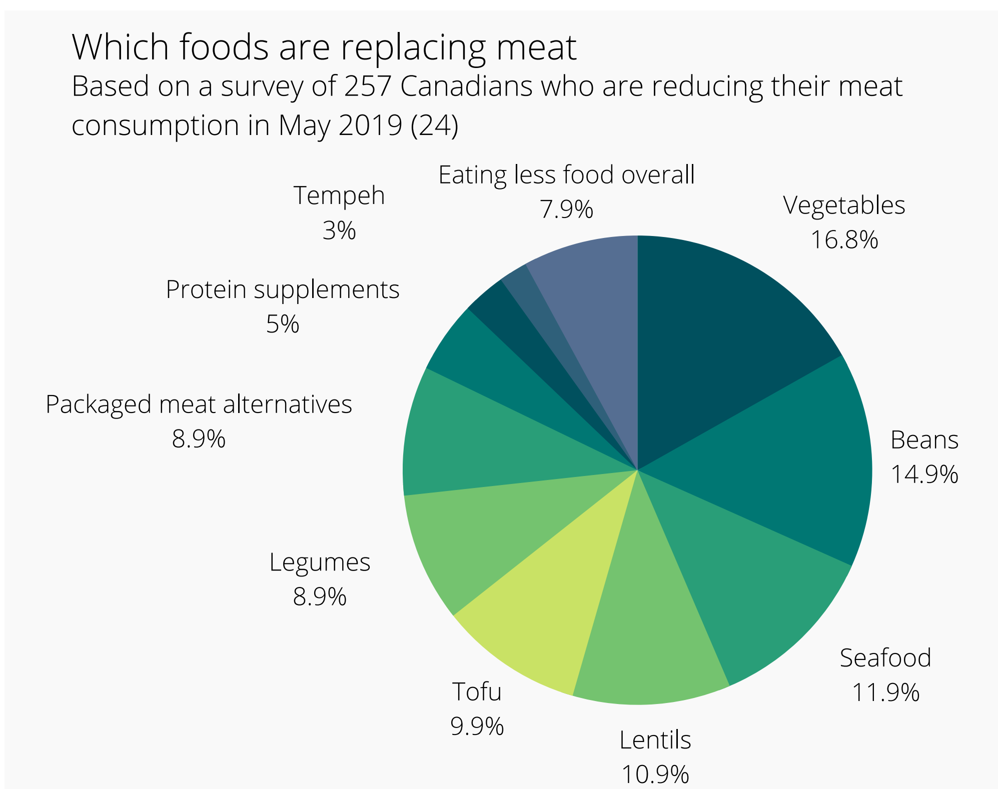
Flexitarians on the Rise

Continued

- **Best Strategies for Targeting Flexitarian Consumers:**
  - Offering plant-based alternatives for the most reduced types of meat (beef and processed meats, followed by pork and lamb) could bring in more meat-reducing consumers.
  - Meat reducing-consumers are turning to a variety of plant-based foods as alternatives to meat. A wise approach offers a bit of everything, from vegetables to legumes to tofu to plant-based meats.



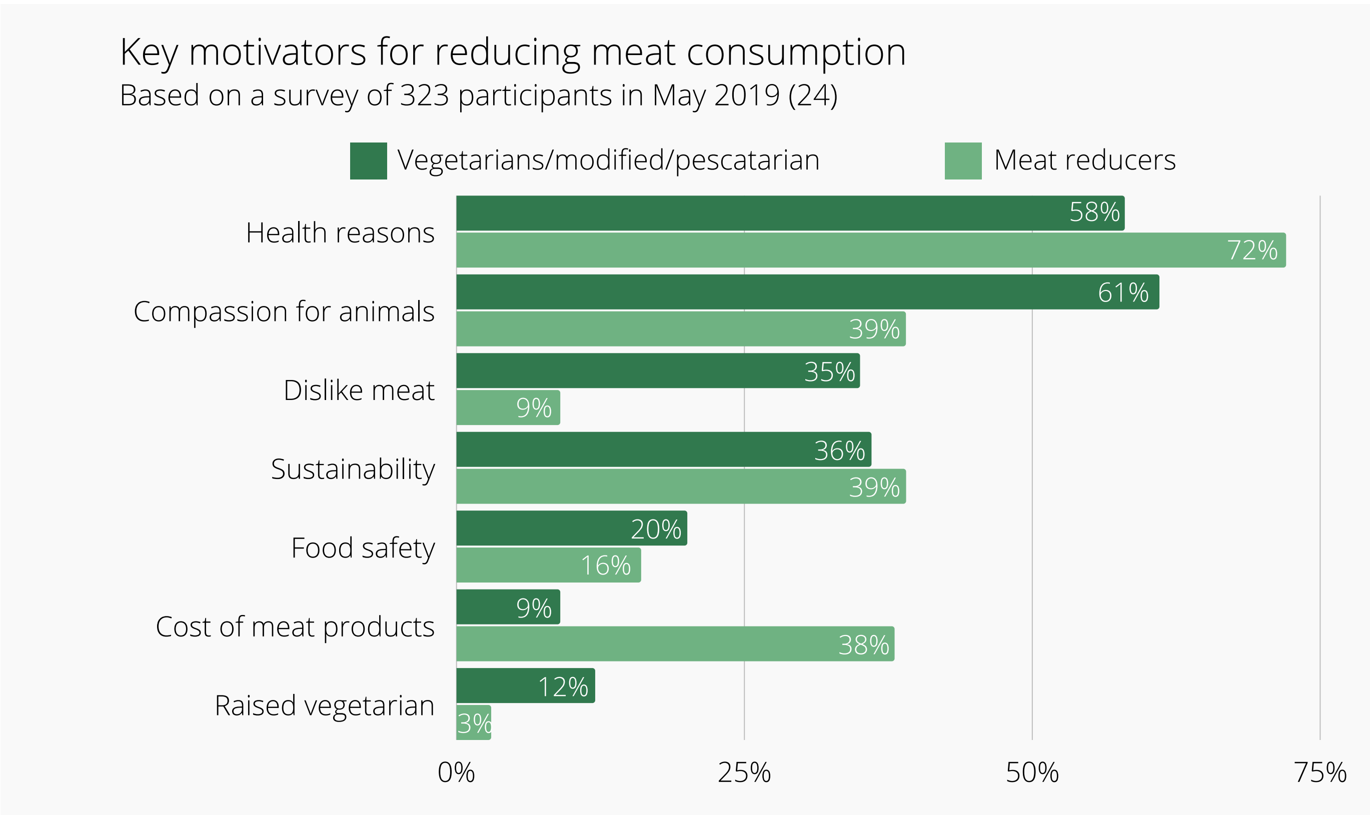
- It is best, however, to avoid using the term "flexitarian" in your marketing materials as it is primarily an industry term and not often used by consumers themselves (22). For more information, see "Importance of Language".
- In a survey of 1,000 Canadians that asked what brands and retailers could do to get them to try more plant-based options, 27% said offer coupons, 26% said in-store product demos, 18% said flyer promotions, 15% said in-store displays, and another 15% said offer recipes and usage ideas (24).



Flexitarians on the Rise

Continued

- **Two-Pronged Strategy**
  - Vegan, vegetarian, and pescatarian consumers, as well as and meat-reducing consumers, have different reasons for looking for plant-based options; it is important, then, to ensure your strategy targets both groups. For more information, see "In-Store Strategies".



Importance of Language

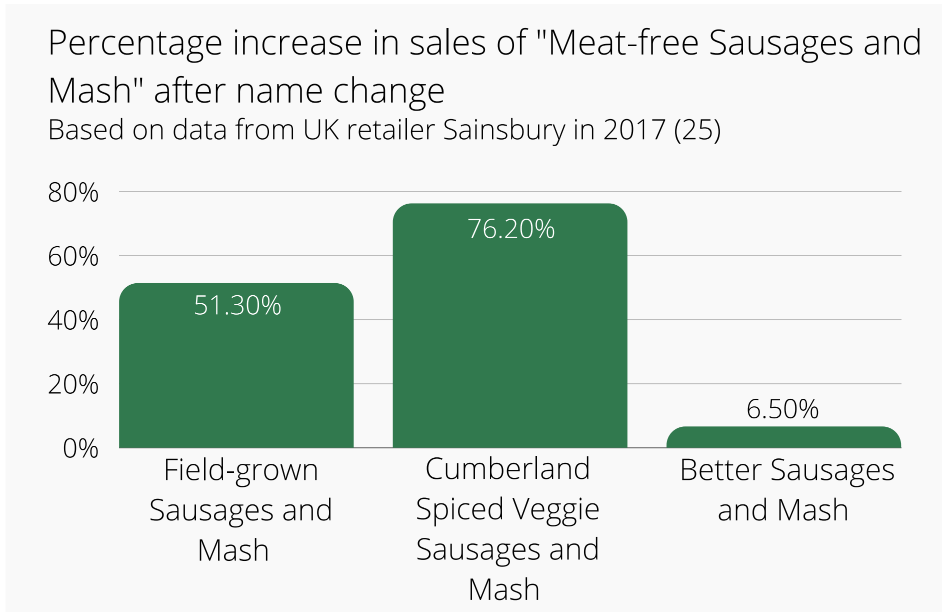
One key method to increase plant-based foods' appeal to the general public is to change the way these foods are labelled and discussed. A good plant-based label should emphasize the experience offered by a food instead of what is missing from it.

- **Language to Avoid**
  - For instance, language such as “meat-free,” “vegan,” “vegetarian,” or other health-restrictive labels can make consumers feel they are missing out on something with this food (25).
  - Vegan and vegetarian labels also carry baggage with consumers: they are often perceived as restrictive, bland, or too different, and can thus feel alienating.
  - In one American study, 35% of consumers said a “vegan” label would make them less likely to buy a product (25).

Importance of Language

Continued

- **Language to Use**
  - Instead, improve a food's appeal by emphasizing its flavour, appearance, texture, provenance, and so on (25).
  - A label could highlight a food's key ingredients, interesting combination of flavours, colourful appearance, or mouth-feel. Some wording examples include "sweet and sour", "zesty", "roasted", "rainbow," "creamy," and "crispy" (25).
  - For a product's provenance, note how, in the United States, Sodexo named its plant-based crab cake "Chesapeake Cake" after the Chesapeake Bay area famous for its crabs. Or, consider highlighting the connection between plant-based products and nature, with terms such as "garden" or "field-grown" (25).
  - These tactics can help overcome consumers' assumptions that plant-based foods are bland or boring.



Change of Consumer Behaviour Due to COVID-19

COVID-19 gave another boost to the already growing plant-based foods market by increasing both consumers' negative associations with the meat industry and positive associations with plant-based diets.

- **Increased Negative Associations of Animal Proteins**
  - COVID-19 already has an association with animal protein in people's minds but, even more potently, it has also shone a light on the meat supply chain and global food security (10).
  - In addition, "increasing human demand for animal protein" has been identified by the UNEP as one of the key activities "most likely driving the emergence of zoonotic diseases", causing many people to question and ultimately change their dietary choices in the interest of reducing the risk of future zoonotic diseases and pandemics (26).

Alex Motoc, @alexmotoc/Unsplash

Change of Consumer Behaviour Due to COVID-19

Continued

- **Increased Positive Associations of Plant-Based Products**
  - On the other hand, plant-based foods have benefited from their perception as healthy and immunity-boosting (10).
  - Medical studies have shown that COVID-19 has a disproportionate effect on people with underlying health conditions such as diabetes, heart disease, and hypertension. A plant-based diet, rich in nutrients and antioxidants, can help reduce the impact of the virus for at-risk patients (10).
  - Health has always been a significant driver for plant-based consumers, but the COVID-19 pandemic has increased this trend and brought health to the forefront of public consciousness (10).

- **Consequent Consumer Trends**
  - As a result, tofu and meat substitute sales in Canada grew 52% from early March to the week of April 18th as compared to the same period the year before. Sales of plant-based proteins rose even more than fresh meat sales which grew by 30% over the same period (27).
  - Other consumer trends likely to impact the plant-based retail market are consumers' continued intention to cook at home — with 71% of American consumers saying they will continue to do so after the pandemic — and their interest in new products; in the latter example, 58% say they will immediately look to purchase new and varied products after the pandemic (28).

Geber86/iStock.com

In-Store Strategies

"A key factor in the continued growth of the category is ensuring consumers can find plant-based products when they do their shopping"
— Leslie Ewing, Executive Director of PBFC (29)

When conventional and plant-based products are placed together, it is key to use simple and visible callouts at the shelf: examples include vegan, plant-based, organic, and others (30).

Allocating space within conventional food sections for plant-based products is **key for increased sales growth**, especially when targeting flexitarian consumers who may not go out their way to a plant-based section (30). This system shows consumers simple substitutes they can buy without significantly changing their lives (30).

Amy Webster/The HSUS

However, as has been mentioned, vegan/vegetarian/pescatrian consumers and flexitarian consumers have different needs. As such, **a two-pronged retail location strategy** best targets both consumer bases.

Two-Pronged Retail Location Strategy

In September 2019, Plant-Based Foods of Canada commisionned a study to find out where consumers across the country wanted plant-based products to be placed in grocery stores. Based on the answers from 750 respondents (including 150 vegan/vegetarians, 300 flexitarians, and 300 animal protein eaters), they recommend a two-pronged plant-based retail location strategy (29):

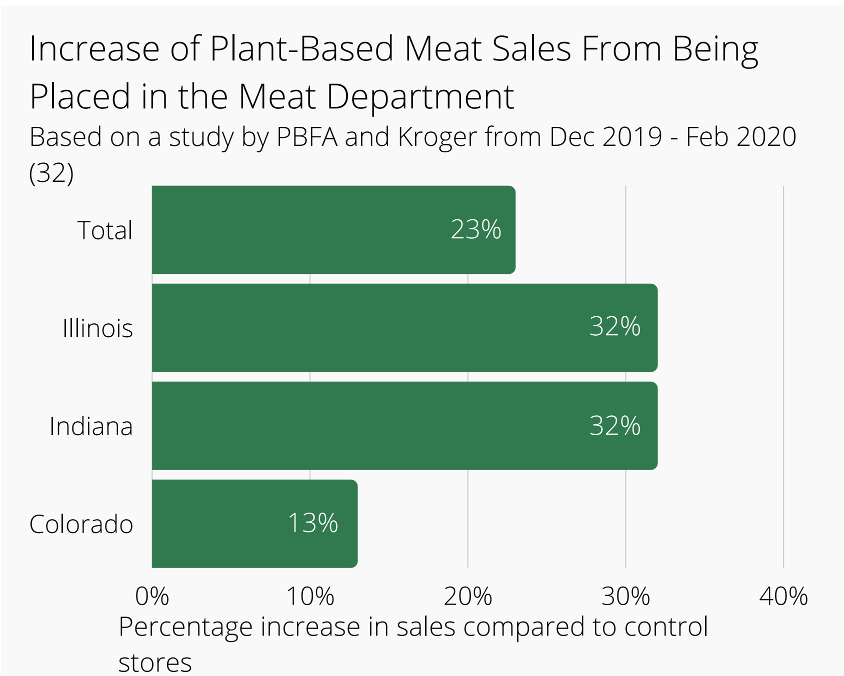
> *"RECOMMENDATION 1: Maintain current location of plant-based foods in-store to address the interests of vegans / vegetarians who represent a small portion of the population but currently a high portion of the volume.*
>
> *RECOMMENDATION 2: Implement secondary placement of plant-based products alongside their mainstream counterparts to address the interests of flexitarians who are looking for options to expand their diets.*
>
> *RECOMMENDATION 3: If space allows, develop a "plant-based zone" in produce with clear signage to allow shoppers to easily identify plant-based options on-shelf."*

Two-Pronged Retail Location Strategy

Continued

- **Other Insights:**
  - In most categories, including those of milk, ice cream, and cheese alternatives, consumers would prefer to see plant-based products merchandised with their mainstream counterparts (31).
  - Vegan/vegetarian shoppers, however, would prefer specific plant-based sections for easier shopping; they would also prefer meat-free options stay in the produce or vegan sections (29).

Successful Strategies In Action



- **PBFA and Kroger Study:**
  - The Plant-Based Foods Association and Kroger ran a study from Dec 2019 – Feb 2020 which found that sales of plant-based meat products did increase when placed in the meat department (32).
  - The study was conducted in Illinois and Indiana, where plant-based products are not yet popular, and in Colorado, which is already a more developed plant-based market (32).
  - During the study, plant-based meat products were placed in a three-foot set within the conventional meat department and Kroger ran a dedicated website offering educational content and recipes (32).

- **Metro's "My Health, My Choices" Program:**
  - Supermarket company Metro demonstrates the efficacy of food-label organization with its “My Health, My Choices” program, launched in January 2021. The feature — available in store, online, and on Metro’s app — categorizes nearly 9,000 products for shopper selection. Vegan, gluten-free, and non-GMO are but three of the approximate 50 categories (33).
  - Products may fall into several categories at once; each applicable attribute is simultaneously displayed. Online customers can also read messages from a dietitian, browse recipes, and view all category products (33).
  - The program is the first of its kind for Canadian grocers, allowing consumers to seamlessly move between categories for lifestyle, taste, and dietary restrictions (34).

Georgijevic/iStock.com

Case Study: Nuts For Cheese

From the farmer's market to being sold in 1,500 grocery stores across Canada in just five years, the Ontario plant-based cheese brand Nuts For Cheese has enjoyed vast retail success. Here are some of the strategies that helped the company to succeed (35).

- **Staying Ahead of the Curve:**
  - CEO and founder Margaret Coons credits a good chunk of her success to launching her product right before plant-based alternatives rose to be the mainstream, in-high-demand category that they are today (35).
  - Specifically, Coons noticed a gap in the market for good-tasting plant-based cheeses. Coons aimed to offer consumers a cheese alternative that tasted great and could be sliced, shredded, and melted like the mainstream product (35).
- **It's All in the Name:**
  - Nuts For Cheese currently offers six flavours of plant-based cheese, and each has a unique, ear-catching name that highlights its flavours or the mainstream product for which it is an alternative: Un-Brie-lievable, Chipotle "Cheddar" Flavoured Wedge, Red Rind, Smoky Artichoke and Herb, Super "Blue", and Black Garlic (35).

Jez Timms, @jeztimms/Unsplash

- **Targeting Everyone:**
  - While she initially expected her consumers to be primarily vegans, Coons soon noticed a much larger audience for her product and started marketing accordingly (36).
  - Among her audience are people with lactose intolerance, customers interested in local and artisanal products, and people simply looking to try something new (36).
  - When speaking on her strategy for marketing, Coons said that she noticed little things which could be done to appeal to all her consumer bases. These strategies include maintaining a cruelty-free message for vegans or, for those with dietary restrictions, using clean ingredients and being clear about product contents (36).

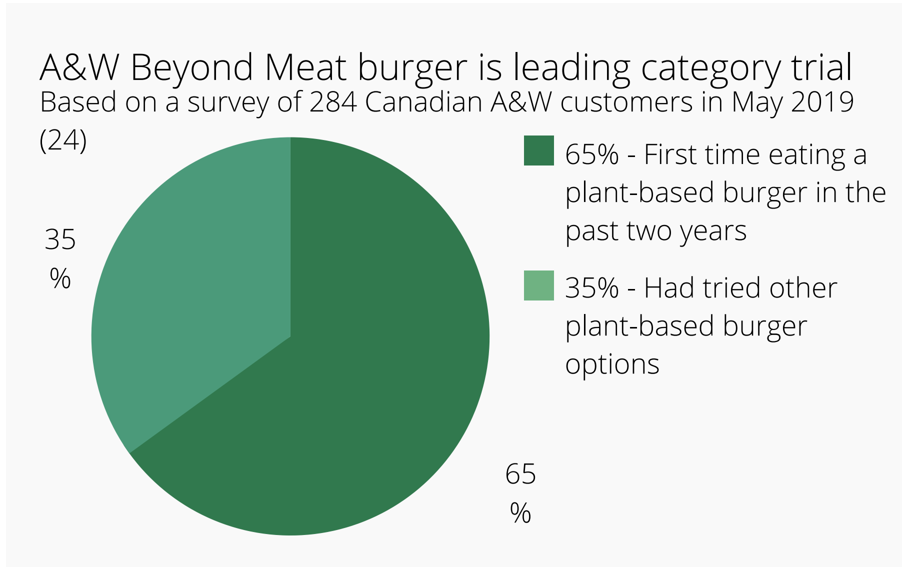
Case Study: Beyond Meat

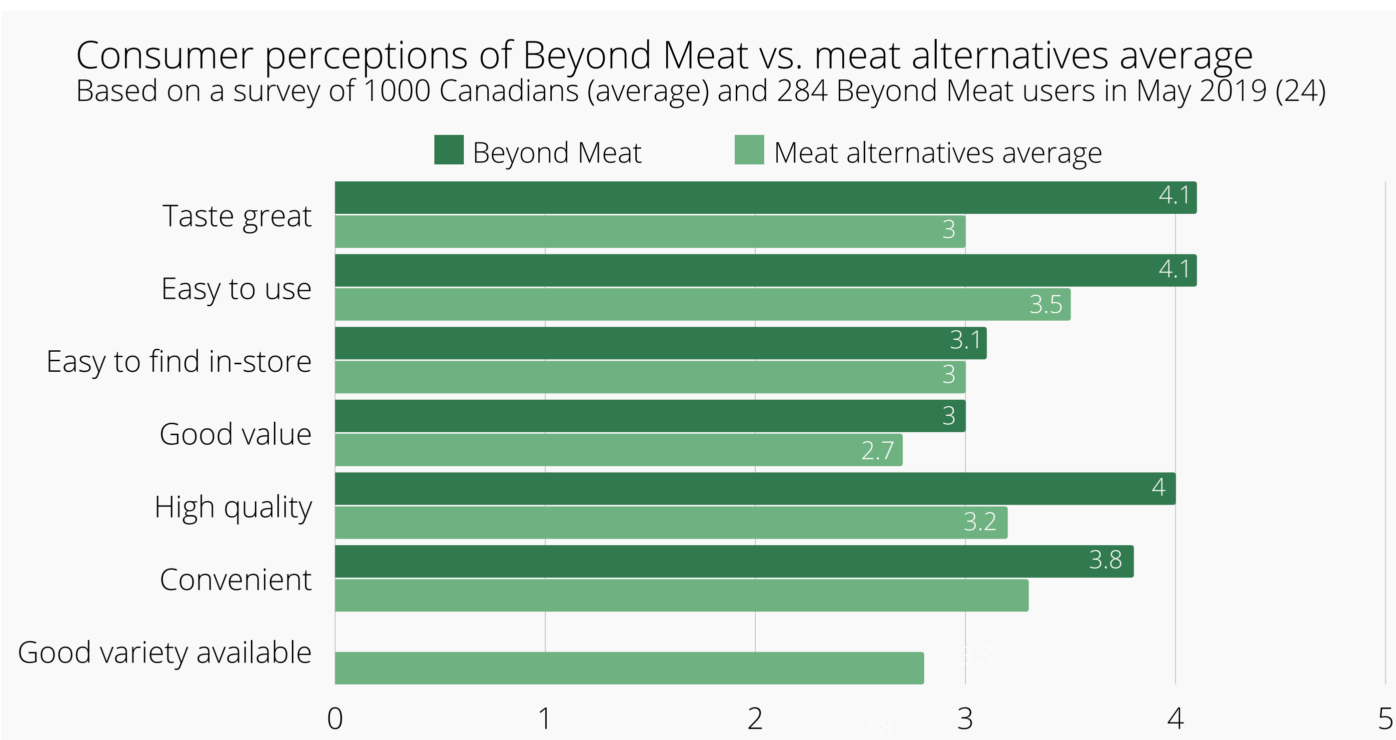
The plant-based company Beyond Meat has been a category leader. It reported sales of $40.2 million for the first quarter of 2019 — a 215% increase from the same period the year before — and is the top plant-based brand that Canadians have tried (11, 37).

Case Study: Beyond Meat

Continued

- **Placement in the Meat Aisle:**
    - One of the company's key success strategies is the placement of their plant-based products in the meat aisle. In fact, Beyond Meat's Executive Chair, Seth Goldman, called the strategy "absolutely critical" because it has vastly increased consumer awareness of their products among meat-eaters (37).
    - Many supermarkets did not initially agree to merchandise Beyond Meat's products alongside their mainstream counterparts, and the strategy faced significant pushback from the meat industry (31, 37).
    - However, Beyond Meat refused to help promote their products' availability at any location that did not sell their products in the meat aisle (37).
    - Beyond Meat reasoned that their products are specifically designed to appeal to meat-eating consumers looking to try new products or reduce their environmental impacts; the company has worked to make their products look and taste as much like meat as possible. Placing their products in the meat aisle, then, ensures that they will be seen by their target consumers (37).
    - This strategy has worked well for the company: they reported that 93% of Beyond Burger buyers also bought meat in the first half of 2018 (37).





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