Food Formulation and Ingredient Trends: Plant Proteins

Description:

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As America's love affair with protein continues, plant proteins specifically are playing an increasingly important role. Key drivers associated with the growing interest in plant protein, sustainability and health of the planet, are starting to be emphasized over personal health, athletic performance or muscle building. This trend can be found both at retail and in foodservice.

Proprietary research conducted by Packaged Facts indicates that the U.S. adults most likely to specifically seek out plant proteins are those ages 25 to 39 (37%) while consumers ages 55+ are least likely to do so (8%). Overall, men and consumers holding advanced college degrees are more likely to seek out food and beverage products containing plant protein ingredients, and Hispanic and Asian consumers show a higher rate of seeking out plant protein than white consumers.

One of the biggest changes associated with recent interest in plant proteins is that categories once thought to appeal almost exclusively to vegetarians and vegans are now targeting mainstream meat eaters. While the percentage of vegans in the United States has been estimated at 6%, a recent study determined that 36% of all consumers use meat alternatives. Major Wall Street investors are betting big on the abilities of biotech startups to master the art and science of making meatless, plant-based meat substitutes to deliver the taste, texture and appearance of real meat to an extent not tried before. At retail, the healthy snacking trend has taken hold with SPINS data indicating that the bean, lentil and pea snacks subcategory grew three times faster than overall salty snack category sales, while typically providing more protein per serving.

According to research conducted by Datassential on behalf of an initiative resulting from collaboration between the Culinary Institute of America and the Harvard T.H. Chan School of Public Health, consumer demand for alternatives to meat protein appears to be outpacing restaurant operator offerings. There is growing recognition that the foodservice industry must play a role in relation to public health and the environment, with the primary contribution it can make being to reduce meat consumption. Half (50%) of consumers surveyed support cutting back on meat, favoring its use as a condiment, and the same percentage responded well to replacing meat or adding nonmeat to menus. Restaurant concepts ahead of the curve when it comes to offering plant proteins and addressing sustainability include Beefsteak, Sweetgreen, Native Foods Café and Veggie Grill.

Underpinning the success of plant protein expansion efforts is assuring a highly acceptable offering of plant protein ingredients. The popularity of pulses, already bolstered in recent years as a result of rising hummus sales, increased use of pea protein as an industrial protein ingredient, both for nutritional value and functional properties, and the fast-paced sales of the relatively new bean snack subcategory, will be increasingly important as new ingredients and more sophisticated application knowledge are developed. Pulses can also be expected to be highlighted more as a result of the United Nations declaring 2016 the International Year of Pulses. Emerging plant protein ingredients getting more attention include hemp, aquatic plants and sacha inchi. While soy continues to be the dominant plant protein, rice protein is becoming better established, and seeds, nuts and ancient grains function as dependable workhorses.

Scope of Report

Consumer interest in boosting protein intake remains strong headed into 2016 with more attention being paid to the specific types of protein being consumed. The desire for clean labels, ease of digestion, the need or desire to avoid allergens, compatibility with vegetarian and vegan lifestyles and concerns about sustainability among the general population are putting the spotlight on plant proteins. Consumer notions of what constitutes a good protein source are expanding to include a wider variety of plant protein ingredients. Food Formulation and Ingredient Trends: Plant Proteins offers a future-focused, in-depth view of plant protein ingredients and reviews some of today's most innovative food and beverage product trends in emerging and rejuvenated categories at retail. It also explores current plant protein concepts and menus in foodservice and provides insights into consumer attitudes and behaviors related to protein ingredients in general while focusing specifically on plant proteins.

Report Methodology
The information in this report was obtained through both primary and secondary research. Consumer data are derived from two sources. A Packaged Facts national online consumer survey was conducted in December 2015 with a panel of 2,000 U.S. adults (age 18+) balanced to the national population on the primary demographic measures of gender, age range, ethnicity, geographic region, marital status, presence or absence of children in the household and household income. Consumer data were obtained from the Simmons National Consumer Survey through Spring 2015 from Experian Marketing Services. On an ongoing basis, Experian Marketing Services conducts booklet-based surveys of a large and random sample of consumers (approximately 25,000 for each 12-month survey compilation) who in aggregate represent a statistically accurate cross-section of the U.S. population.

Retail sales figures credited to IRI (Chicago, IL) are based on IRI aggregated multi-outlet (MULO) sales tracking, which represents sales through U.S. supermarkets, drugstores including Walgreens, CVS and Rite Aid, mass merchandisers (Wal-Mart, Target, Kmart and Shopko), warehouse clubs (Sam's Club and BJ's, but not Costco), dollar stores (excluding Dollar Tree) and military commissaries.

Primary research included interviews and discussions with various industry experts, review of ingredient company websites, consumer food and beverage product websites, restaurant websites including online menus, visits to bricks and mortar stores, including both conventional and natural and organic retailers and review of select food and beverage products in the retail marketplace containing plant-based protein sources. A wide range of secondary sources was also leveraged including industry reports, videos embedded in websites, presentations obtained from seminars, workshops and conferences, trade publications, business newspapers and magazines, consumer blogs, financial blogs, social media, annual reports, 10Ks and press releases.

Who Will Benefit From This Report

- Food and Beverage Manufacturers and Marketers
- Foodservice Operators
- Ingredient Companies
- Private Label Marketing and Product Development Firms
- Advertising Agencies
- Investment Banks

Benefits of This Report Include

- Findings of Packaged Facts proprietary research exploring consumer attitudes and behaviors with respect to plant proteins
- Coverage of plant protein ingredient trends, including new ingredient launches
- Pulses (including Pea Protein, Chickpeas, Other Beans and Lentils)
- Hemp
- Aquatic Plants
- Soy
- Seeds and Nuts
- Ancient Grains
- Coverage of retail food and beverage categories leveraging plant proteins
- Meat Analogs and Substitutes
- Hummus
- Nutrition and Energy Bars
- Nut and Seed Spreads
- Non-dairy Beverages
- Use of plant proteins in foodservice
- Identification of opportunities for plant proteins for food and beverage manufacturers and in food service
- Prediction of future trends

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