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
- Enriched with Plant Proteins
- 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

Contents:
- Chapter 1 Executive Summary
- Scope
- Report Methodology
- Key Drivers
- America’s Insatiable Appetite for Protein
- Plant-Based Diets Associated with Better Health and Longevity
- “World’s Most Famous Vegan”
- More Lifestyles Embrace Reduced Meat Consumption
- Millennials Most Likely to Forego Meat
- Concerns About Dairy & Meat Steer Consumers to Plant Proteins
- Awareness of Environmental Sustainability and Social Responsibility
- Innovations in Plant Protein Ingredients
- Categories Betting on Plant Protein
- Protein Options in Plant Forward Dining
- Consumers and Plant Proteins
- Chapter 2 Innovations in Plant Protein Ingredients
- 2016 Declared International Year of Pulses
- Table 2-1 U.S. Dry Bean, Lentil and Pea Production:Select Data, 2012–2014
- Pulses Offer Benefits Beyond Protein
- U.S. Farm Bill Promotes Pulses and Healthier Meals for School Kids
Pulse Ingredients
Vitessence: Clean-Label Pulse Proteins for Enrichment and Functionality
Versatile VegeFull Cooked Bean Ingredients Add Protein & Functionality
Terasante Whole Food Plant Protein From Sprouted Legumes
Pea Protein: First Pulse Protein To Go Mainstream
Nutritional and Functional Aspects of Pea Protein
Types of Pea Protein Ingredients
Overcoming Flavor Challenges of Formulating With Pea Protein
Categories Formulated With Pea Protein Ingredients
Roquette Nutralys Pea Proteins Target Wide Range of Applications
Table 2-2 Roquette Nutralys Vegetable Protein Ingredients by Suggested Applications
Pea Protein Supports Muscle Growth
Veg-O-Tein P80 Pea Protein From Axiom Foods Utilizes Patented Process
ADM Contemplates Offering Pea Protein
PeasiPro XS
PURIS Pea Controls Seed and Ingredient Supply for Enhanced Quality
Glanbia Nutritionalns EasyFlav Technology Eliminates Bitter Notes
Hemp: Headed for New Highs?
From Fringe to Fabulous: Hemp's Protein Content Helps Drive Serious Interest
U.S. Agricultural Hemp Production: Coming Soon?
Rice Protein – A New Whey Rival for Rebuilding Muscle?
AIDP Launches RisaPro XS
Sprouting Increases Lysine Content of Rice Protein
Oryzatein: First Brown Rice Protein Granted GRAS Approval
Soy: Still Supreme Among Plant Proteins
Snacks with Soy Protein Help Adolescents Fend Off Hunger
ADM Launches SUPERB Soy with Protein and Fiber
Aquatic Plant Protein Makes a Splash
Mankhai Plant Protein Produced Using an Advanced Hydroponic System
Lentein Boasts More Essential Amino Acids than Soy or Pea Protein
Sacha Inchi: An Ancient Plant Protein Source From Seeds
Nutralys Wheat Protein
Terasante Whole Food Plant Protein From Leafy Greens
Plant Protein Blends for Vegan Bars
Ancient Grains Boost Plant Protein Content
Popular Press Flags Ancient Grains that Rival Quinoa's Protein Content
Continued Optimism For Quinoa Protein Concentrate
Amaranth: From Ancient Grain to Functional Food
Chapter 3 Categories Betting on Plant Protein
World's First Vegan Butcher Shop
Silicon Valley Transforming the Future of Food
Taking Meat Analogs to a New Level
Beyond Meat Stakes a Claim for “Plant Meat”
Table 3-1 Beyond Meat Brand Beef Analog Product Offerings (2015)
Table 3-2 Beyond Meat Brand Chicken Analog Product Offerings (2015)
Illustration 3-1 Beyond Meat Chicken-Free Strips (Refrigerated Case)
Illustration 3-2 Beyond Meat, Beyond Chicken
– Grilled Strips (Freezer Aisle)
Impossible Foods in Pursuit of the Best Plant-Based Burger
Plants That Taste Like Meat: Can It Really Be Done?
Optimism for Conventional Meat Alternatives
Lightlife Expands Meatless Range
Illustration 3-3 LightlifeTM Smart Sausages Meatless Harvest Apple
Plant Proteins at Tipping Point: Pinnacle Snatches Up Gardein
Neat Foods
Gluten-Free Burritos and Veggie Burgers
Illustration 3-4 Qrunch Foods Qrunch Quinoa Burgers
Beanitos Adds Hint of Lime
Chips Featuring the Good Bean Protein Blend
Boulder Canyon Protein Crisps Feature Lentils and Pea Protein
BeanStalks: Three Types of Bean Snacks in One Bag
Illustration 3-5 Mediterranean Snacks BeanStalks
Private Label Brands Join the Bean Snack Trend
Medifast Crisps With Pea Protein
Deli Meat Company Sees Opportunity in Hummus
Sabra Teaches America How to Eat Hummus
Tribe Aims to Make Hummus “The New Salsa”
Illustration 3-6 Tribe Swirl Sweet Red Pepper Hummus
Hemp Seeds Find Home in Hummus
Illustration 3-7 Hope Hummus Organic Super Hemp Hummus
Beyond Chickpeas: Hummus as a Vehicle to Popularize Other Beans
Illustration 3-8 Eat Well Embrace Life Wasabi Edamame Hummus
With Ginger
But Is It Still Hummus?
Plant Ingredients Boost Protein in Traditional Products
Nutrition Bars that Pack a Plant Protein Punch
Hemp Gaining Ground, but Soldiers Beware!
Illustration 3-9 Manitoba Harvest Hemp Heart Bar with Hemp Seeds
Illustration 3-10 Kind LLC Strong & Kind Bar with Hemp Seeds
No Cow Bar Aims to Redefine Natural with “Cutting-Edge” Plant Ingredients
Illustration 3-11 D's Naturals No Cow Bar
Mediterra Expands Savory Nutrition Bar Range with Plant Protein Sources
Illustration 3-12 Mediterra Savory Bar with Kale & Pumpkin Seeds
Illustration 3-13 Barbara's Better Granola
Fluffbutter: Protein-Enriched Nut Butter with Added Plant Protein
Illustration 3-14 D's Naturals Fluffbutter Protein Infused Nut Butter,
Creamy Chocolate S'Mores
SuperButter Premium Seed Butter
Illustration 3-15 GoodSeed, LLC SuperButter Premium Seed Butter
Beverages Featuring Added Plant Protein
Illustration 3-16 Califia Farms Vanilla Protein Almondmilk
Illustration 3-17 Suja Life LLC Organic Sunset Protein
Chapter 4 Protein Options in Plant Forward Dining
Consumers Ahead of Foodservice Operators in Terms of Plant Proteins
Characteristics of Sustainable-Receptive Consumers
Table 4-1 Plant Protein Ingredients: Protein Content, U.S. Menu Penetration and Growth Rates
Subway Encouraged to Expand Vegan Options
Table 4-2 Native Foods Café Menu Descriptions of Plant-Based Proteins
Plant-Forward vs. Plant Protein-Forward
Chapter 5 Consumers and Plant Proteins
Younger Consumers, Hispanics and Asians Seek Out Plant Proteins Most
Figure 5-1 U.S. Adult Consumer Protein-Seeking Behavior by Age
Figure 5-2 U.S. Adult Consumer Protein-Seeking Behavior by Ethnicity or Race
Males and Better Educated Consumers More Likely to Seek Plant Proteins
Specific Plant Protein Use Highest for Consumers Ages 25 to 39
Figure 5-3 % U.S. Adult Consumers Purchasing or Consuming Various Protein Sources Past 30 Days
Table 5-1 % U.S. Adult Consumers Purchasing or Consuming Various Protein Sources in Past 30 Days
Bars Top List of Most Consumed or Purchased Products with Protein
Figure 5-4 % U.S. Adult Consumers Purchasing or Consuming Select Food & Beverage Categories Formulated with Protein, by Ethnicity or Race
Past 30 Days
Over Half of Consumers Ages 25 - 39 Buy or Eat Bars Formulated with Protein
Figure 5-5 % U.S. Adult Consumers Purchasing or Consuming Select Food & Beverage Categories Formulated with Protein, by Age Past 30 Days
U.S. Consumer Shopping Behaviors Related to Protein Ingredients
Figure 5-6 Level of Agreement by U.S. Adult Consumers with the Statement:
I use food products formulated with vegetarian protein instead of meat partly because they are less expensive.

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