The market movement toward plant-based products includes food, beverages, supplements, personal care and even packaging. Drivers of this movement stem from two foundational beliefs: plant-based nutrients are healthier for my body and plant-based solutions are healthier for the planet and it is the intersection of these, across a product’s lifecycle, where powerful opportunity space lies.
Whether you are an ingredient supplier, formulator, consumer brand, manufacturer, innovator or strategist — you need to understand what is driving the Plant Based movement and where it’s going.

- Which drivers are continuing to grow and which are already flattening or even declining; Vegan? Vegetarian? Flexitarian? Environmental? Societal?
- What technologies are emerging that will shape future opportunities?
- What human health drivers and planetary health concerns are fueling growth?
- Are consumers really willing to give up meat, dairy, and other animal sourced ingredients?
- For which categories are consumers willing to pay more?
- What plant-based science will enable new solutions and continued growth?

**Deliverables from this Study provide Insights that will inform:**

- Ingredient Strategies
- Brand Strategy
- Product Innovation
- Investment Risk/ROI
Phase 1: Foundational Consumer Insights

Core & custom options, to catapult your opportunities!

**Turbo Social Media Analysis** – by analyzing millions of consumer conversations this work identifies: who is speaking; in which “channels” are these conversations taking place; the relative importance of different topics; the sentiment/drivers surrounding plant-based and how these differ by psychographics and demographics. This insight is critical to understanding the larger trend momentum, what is influencing consumers and which facets could be leveraged for growth. Analysis, Commentary, PPT report

**Consumers Face-to-Face** – Consumer groups and peer-to-peer ethnographies will dive deeply into the motivators behind engagement – fears, goals, ideals and drivers – to uncover insights that can be leveraged for greater participation. Small group conversations among 80 consumers across three U.S. locations with segmentation of respondents will bring a diverse perspective to this study. Analysis, Insight, PPT report

**NMI’s proprietary Health & Wellness Trend Database (HWTD)** – Trended analysis of consumer attitudes and behaviors, including the lens of NMI’s Health & Wellness Consumer Segmentation, will provide insights surrounding the facets of Plant-Based: vegetarianism, planetary health concerns, personal health concerns; what % of specific groups are buying plant-based protein, non-dairy milks, meat alternatives, etc.; who are best targets and where white space opportunities exist. Analysis, Insight Summary, PPT report

**Custom Option:** Add Consumer Groups among your brand/category users or other specific targets

**Custom Option:** Expanding Consumer Insights to a global scale – pick your countries/regions

**Custom Option:** Quantitative Insights across your brand/categories
Phase 2: Market Assessment

Core & custom options, to catapult your opportunities!

**Product Ingredients and Claim Trends** – NMI will analyze key categories for patterns, changes and dynamics across claims and ingredients. By utilizing analysis with 1 year, 3 year, and 5 year views, this work identifies which trends are on the rise and what may have already plateaued or even be declining. This is critical to knowing what are important but non-differentiating table stakes; and, where growth opportunities lie. Analysis, Insight Summary, PPT report

**Brand and Manufacturer Landscape:** NMI will provide insight into brands and manufacturers who are already in this space and/or who are poised to have an impact. Mapping their unique capabilities, market positions, or potential investments provides context for potential supplier and partner opportunities as well as insight into market leaders. Analysis, Commentary, PPT report

**Custom Option:** Sales analysis across your categories and/or by key ingredients; can include segmented views; customized for your needs

**Custom Option:** Specific Ingredient analysis can help you understand the suppliers and the opportunities. Examining pricing and points-of-difference can assist formulation and application insights as well as supplier/partnership opportunities. Plant-based ingredients of importance to this project include: Proteins, Hydrocolloids, Fiber, Oil, and Humectants
Phase 3: Emerging Science Insights

Science Enablers:

NMI will interview key Scientists and Researchers (approx. 20) to present a view of the cutting edge of plant-based science.

This work will also utilize publications and other sources to provide a well-rounded examination of emerging science that could enable significant growth through new formulations, innovation and brand extensions.

Includes Synthesis, Commentary, PPT report
NMI’s Health and Wellness Trends Database

- Most comprehensive data available on health and wellness; based on **attitudes, behavior and product usage** within the world of health and wellness
- **Annual consumer research** among U.S. general population adults and primary grocery shoppers and select global countries
- Currently **19 years of USA trended data**: 1999 through 2018, inclusive; a total of ~70,000 consumers in the U.S. database; plus coverage in select countries
- Nationally representative sample of the U.S. population **n=3000+**; statistically valid at 95% confidence level to +/- 1.8%; global sample **n=1000+ per country balanced to population**
- Conducted via **on-line methodology**
- Includes NMI’s proprietary Health and Wellness Segmentation

**Health & Wellness Trends Database**

- **Health and Lifestyle Focus**
  - Food
  - Beverage
  - Supplements
  - Personal Care
  - Diet/nutrition
  - Natural, organic
  - Non-GMO
  - Food Ingredients
  - Healthy lifestyle drivers
  - Association of ingredients with specific health benefits
  - Health conditions, lifestyle and demographic measures
  - Usage patterns across foods, supplements, healthcare, natural/organic; categories
  - Shopping Behavior
  - Brands, influence and media

**Health & Wellness**

- Since 1999

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NMI’s Health & Wellness Consumer Segmentation Identifies Which Segments are Driving the Plant-Based Market

**WELL BEINGS®**: 26%
- Most health pro-active

**MAGIC BULLETS®**: 20%
- Lower commitment to healthy lifestyle

**EAT, DRINK & BE MERRYS®**: 17%
- Least health active
- Little health motivation

**FOOD ACTIVES®**: 14%
- Mainstream Healthy
- Self-directed balance

**FENCE SITTERS®**: 23%
- ‘Wannabe’ healthy
- Quick, easy solutions

WELL BEING Leaders: 11%
WELL BEING Followers: 15%

2017 U.S. General Population
Project Deliverables, Costs and Timing

Core Deliverables
1. **Analysis and Power Point Reports**
   - Provided at the conclusion of each phase and activity
2. **NMI Webinars for Participating Companies**
   - Summary webinar at conclusion of Phase 1 – 2 hour presentation
   - Summary webinar at conclusion of Phase 2 & 3 – 2 hour presentation
   - Presentations by NMI Executive Team and Innovation Experts

Custom Options for Your Business
1. **Executive Presentations for your Core Team(s)**
2. **Consulting and workshop sessions**
3. **Customization of project activities and deliverables**

2019 Plant Based Trade & Consumer Trends Tracker Timetable

- **Participation deadline:** December 2019
- **Sponsor deliverables:** April 2019
The Future of Plant Based Product Opportunities
2019 USA Consumer Insights Study