Unmet Needs: Insights & Solutions

84.51° and the Plant Based Foods Association

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WHO WE ARE

The Plant Based Foods Association is a member-based trade organization with the mission to champion, strengthen, and elevate our members and the plant-based foods industry. We currently represent over 350 plant-based food companies.

The Plant Based Foods Institute, our sister non-profit organization, is focused on driving a plant-based food system transition through policy and business strategies.

OUR VISION

A world where values and business interests harmonize to create a plant-based food system that respects the dignity and health of all living beings and the planet.
Unmet Needs Solution
Objective

A qualitative and quantitative approach to understanding consumers' mindsets around plant-based foods and where the opportunities for growth exist.
# Methodology

<table>
<thead>
<tr>
<th>Recruitment</th>
<th>Data Collection</th>
<th>Tech Platform</th>
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</table>
| • Kroger/84.51° shopper data of 60M households  
  • Behaviorally target and recruit top 50% spenders of plant-based meats, milk, or cheese during the past six months  
  • Consumers' ages 25-64 | • Conducted virtually through a 60-minute qualitative conversation  
  • Advanced technology platform where consumers can share open-ended responses  
  • The platform provided quick analysis of their responses (%) | • Two outputs: Assembly vs. Consensus  
  • Assembly results present all opinions  
  • Consensus results quantify the top most popular thoughts, opinions or feelings of the group |

78% FEMALE: 1) More likely to survey, 2) More likely to be plant-based consumers, 3) Primary Grocery Shoppers
Key Findings
Think about...

PAD THAI

CHICKEN SCAMPI

AFFOGATOS

BOLD & LAYERED SPICES

CULTURAL CUISINES

INDULGENT & FULFILLING

SOURCE: PBFA, MARKETPLACE DEVELOPMENT - 2023
On average, consumers like health benefits most

<table>
<thead>
<tr>
<th>Category</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
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</thead>
<tbody>
<tr>
<td>Health Benefits</td>
<td>8.0</td>
<td>7.5</td>
<td>5.0</td>
<td>2.5</td>
</tr>
<tr>
<td>Animal Welfare</td>
<td>7.5</td>
<td>5.0</td>
<td>2.5</td>
<td>0.0</td>
</tr>
<tr>
<td>Taste/Flavor</td>
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<td>3.0</td>
<td>2.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Variety of Products</td>
<td>2.5</td>
<td>2.0</td>
<td>1.5</td>
<td>1.0</td>
</tr>
<tr>
<td>Cost</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
</tbody>
</table>

Source: Unmet Needs Discovery Survey, 84.51° Insights, 2023
Overall, consumers dislike the consistency/texture most, followed by high price.

What Consumers Dislike Most About Plant-Based Foods

Source: Unmet Needs Discovery Survey, 84.51° Insights, 2023
A deeper dive into ingredient sentiment

Consumers called out that the amount of additive ingredients and excessive sodium in plant-based products is a problem that must be solved.

**54%** AGREED WITH THIS STATEMENT:

"I dislike that even though plant-based options are healthier...there are still hidden unhealthy ingredients that people are not aware of."

**SOURCE:** UNMET NEEDS DISCOVERY SURVEY, 84.51 - 2023

<table>
<thead>
<tr>
<th>AGE 35-44</th>
<th>AGE 55-64</th>
</tr>
</thead>
<tbody>
<tr>
<td>68%</td>
<td>63%</td>
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</table>
Cheese is the final frontier

Consumers are unhappy with the taste and texture of plant-based cheese, noting “plastic” or “unnatural” taste, “grainy” texture. They want cheeses that:

- **TASTE BETTER**
- **MELT WELL**
- **HAVE A CREAMY TEXTURE**

73% agreed with this statement:

“I wish there was a better plant-based cheese alternative that tasted like regular cheese, melted well, and didn't have a grainy texture.”

SOURCE: UNMET NEEDS DISCOVERY SURVEY, 84.51 - 2023
What would make consumers buy or try new plant-based products?

Taste and/or healthy ingredients are table stakes for consumers to trial new products; consumers mention that reviews, samples, or promotions encourage trial.

71% AGREED WITH THIS STATEMENT:

“I would want to know something about the taste and texture before purchasing. Review or sample in store.”

SOURCE: UNMET NEEDS DISCOVERY SURVEY, 84.51 - 2023
Thought-starters and innovative ideas can help solve unmet needs

1. EXCITING, BOLD FLAVORS
   - Exciting, bold new flavors and spices in lieu of salt
   - Culturally relevant ethnic cuisine foods like curries and Thai dishes
   - Familiar foods like tamales, enchiladas, and mac & cheese

2. PRE-MADE MEALS
   - More pre-made, nutrient-dense meals that are easy for breakfast, lunch, or on-the-go (frozen/non-frozen)

3. CHEESE ADVANCEMENTS
   - Advancements in plant-based cheese for better taste, texture, and the ability to melt

SOURCE: UNMET NEEDS DISCOVERY SURVEY, 84.51 - 2023
### Challenges

- Taste, flavor, and quality of ingredients are key pain points consumers cited.
- Consumers find it difficult and/or time-intensive to prepare or consume plant-based meals.
- Plant-based cheese struggles due to texture and flavor.
- Other than plant-based milk, many plant-based foods are hard to find in stores/markets.

### Solutions

- Improve flavor by adding natural ingredients like spices and herbs, reduce processed ingredients and sodium.
- Convenience is important. Develop foods that are easy to prepare, easy to consume on-the-go.
- Advancements in techniques like fermentation for plant-based casein will benefit emerging products and brands.
- Place plant-based foods alongside animal-based food for visibility.
In 100 years, imagine a world where...

- Plant-based foods are indistinguishable from animal-based products
- Plant-based foods expand beyond imitating animal-based products

69% AGREED WITH THIS STATEMENT:

“I think in 100 years there will be more options available. I think more products will be perfected as far as taste and texture. I think there will be things that we have not even thought of yet.”

SOURCE: UNMET NEEDS DISCOVERY SURVEY, 84.51 - 2023
Thank you!

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