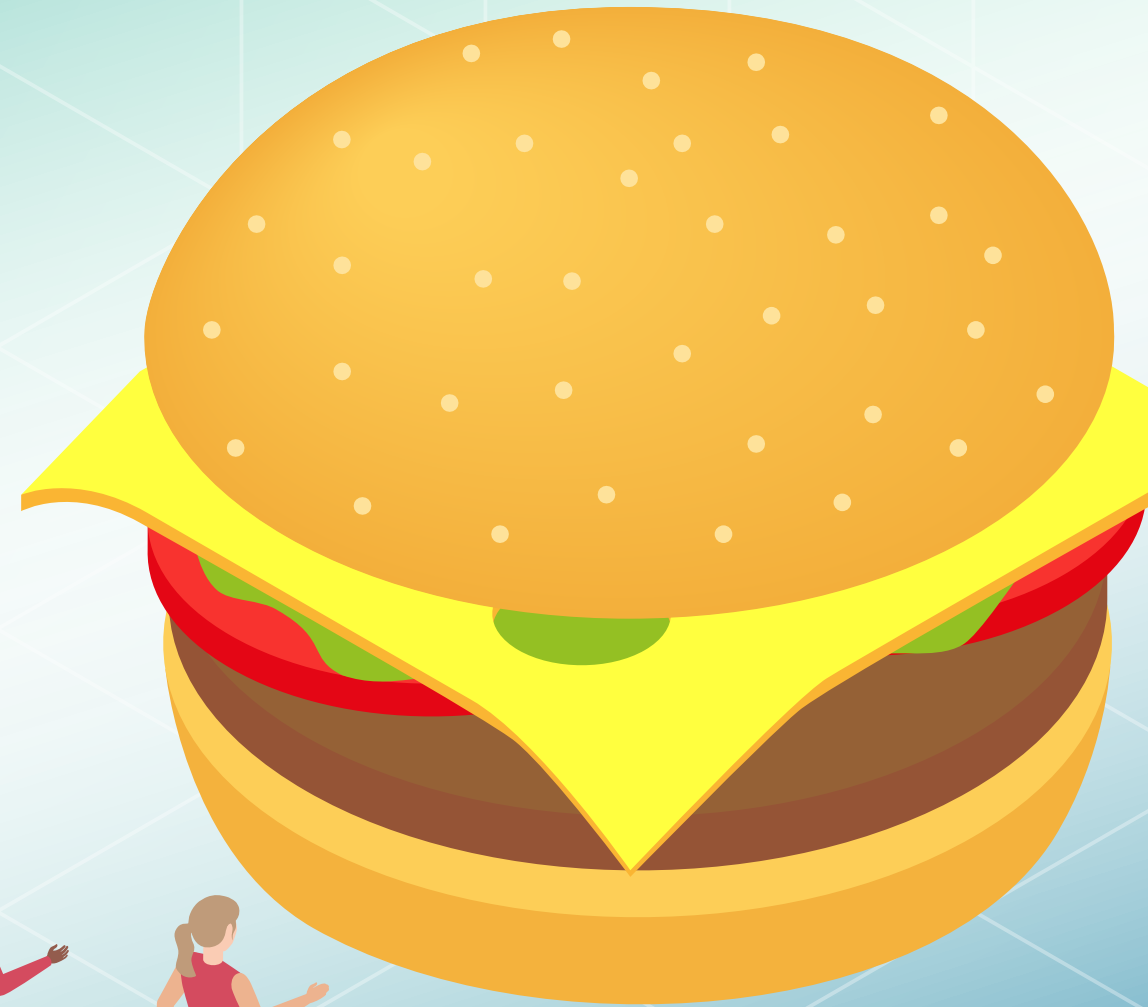


# Meatless Goes Mainstream

2021 Trends in Plant-Based Meat



# Table of Contents

## Evergi™ Conversations:

We collect social listening data from Twitter and Instagram posts utilizing keywords related to wellness. Posts are tagged by product type and subtype, medical conditions, ingredients, need states, and associated keywords.

## Evergi™ Consumers:

Survey fielded semi-annually online with 5,000 US consumers age 21+. The first wave was fielded December 2020. This is a general population survey, census-balanced on age, gender, and geography.

3. **Introduction**  GO TO SECTION

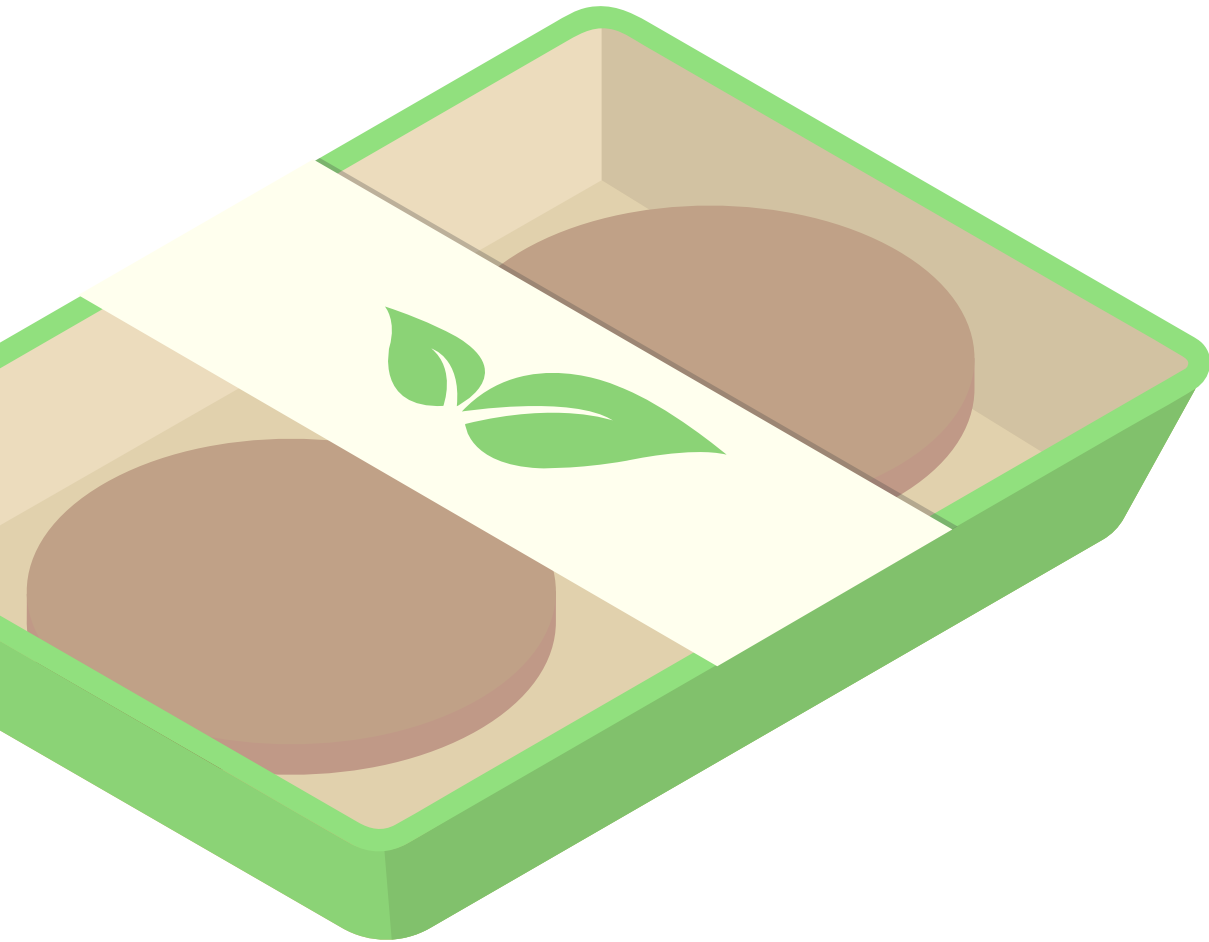
4. **Plant-Based Shoppers**  GO TO SECTION

5. **Why Choose to Eat Less Meat?**  GO TO SECTION

7. **Plant-Based Meat on the Market**  GO TO SECTION

10. **Key Takeaways**  GO TO SECTION

# Introduction



The meat-alternatives trend is heating up in 2021. A few years ago, vegans and vegetarians were the only people thought to enjoy veggie burgers. **Today, the plant-based trend is driven by Americans looking to eat meat in moderation.** Instead of ditching meat entirely, consumers are integrating plant-based options between their beef and chicken.

There has been a cultural push to consume less meat. Starting in 2003, the trend of “*Meatless Mondays*” took off through media mentions, advocacy groups, and word-of-mouth. According to the campaign, 42% of Americans were aware of Meatless Monday in 2019. Of those aware, 35% say the campaign influenced their decision to at least consider cutting back on meat.

Plant-based meat is no longer a niche trend. Meatless options are appearing alongside the real thing in the meat case rather than tucked away in the vegetarian section.

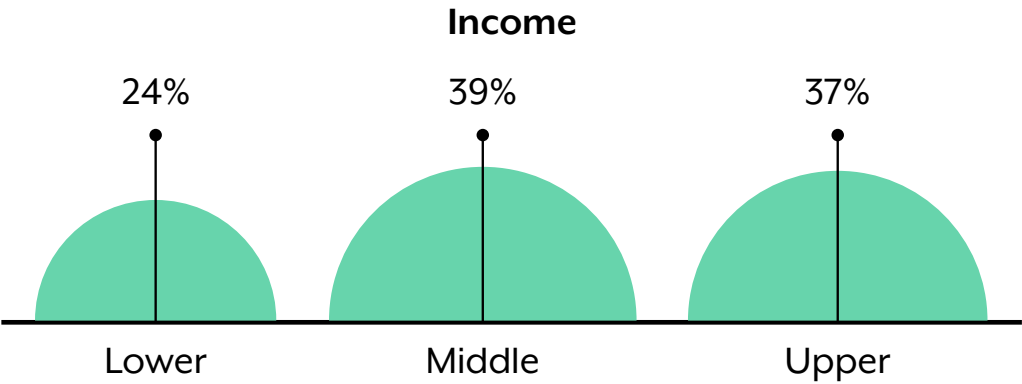
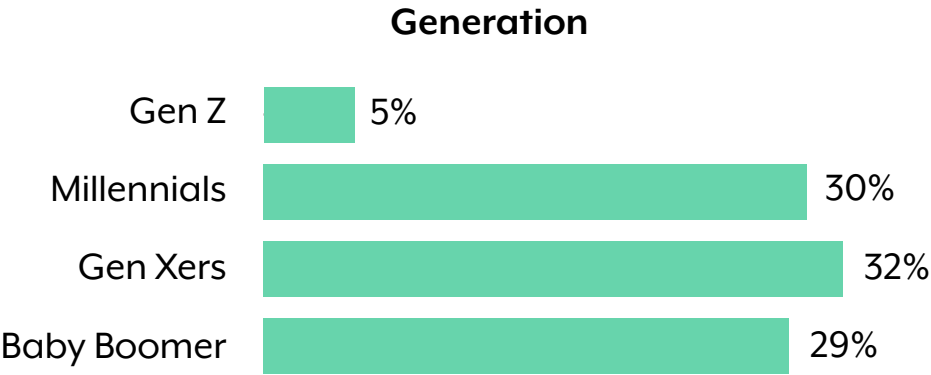
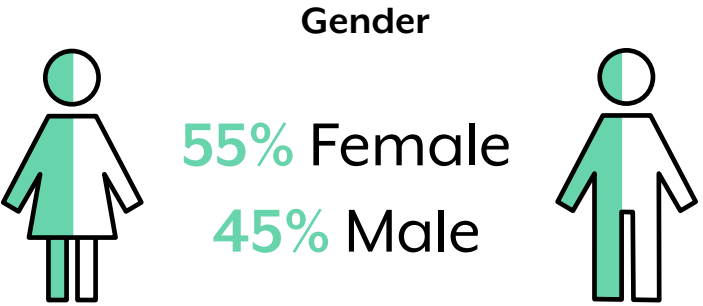
In early 2021, **10% of Americans reported purchasing plant-based burgers**, meat, or sausages in the last 3 months. But 71% of plant-based buyers also bought meat, and only 16% of these purchasers follow a vegetarian or vegan diet. Of these consumers enjoying plant and animal-based meats, less than a third say they’re the first to try new trends indicating these users are interested in these products beyond its novelty.

# Plant-Based Shoppers

Consumers purchasing plant-based meat are more likely to be under 40 when compared to conventional meat eaters and slightly more likely to be female. These consumers have higher income, which makes sense considering plant-based meat's higher price tag.



## Plant-Based Shopper Demographics



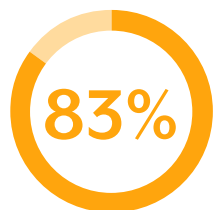
# Why Choose to Eat Less Meat?

## It's Better for the Planet

Producing and raising meat takes a lot of energy and toll on natural resources. Widespread knowledge of the unsustainability of mass produced meat is driving the trend to eat less of it. **87% of plant and animal-based meat eaters believe that plant-based meat alternatives are better for the environment.** Plant-based meat consumers are also more eco-minded than the average person:



agree global warming is a serious threat



are looking to repurpose items



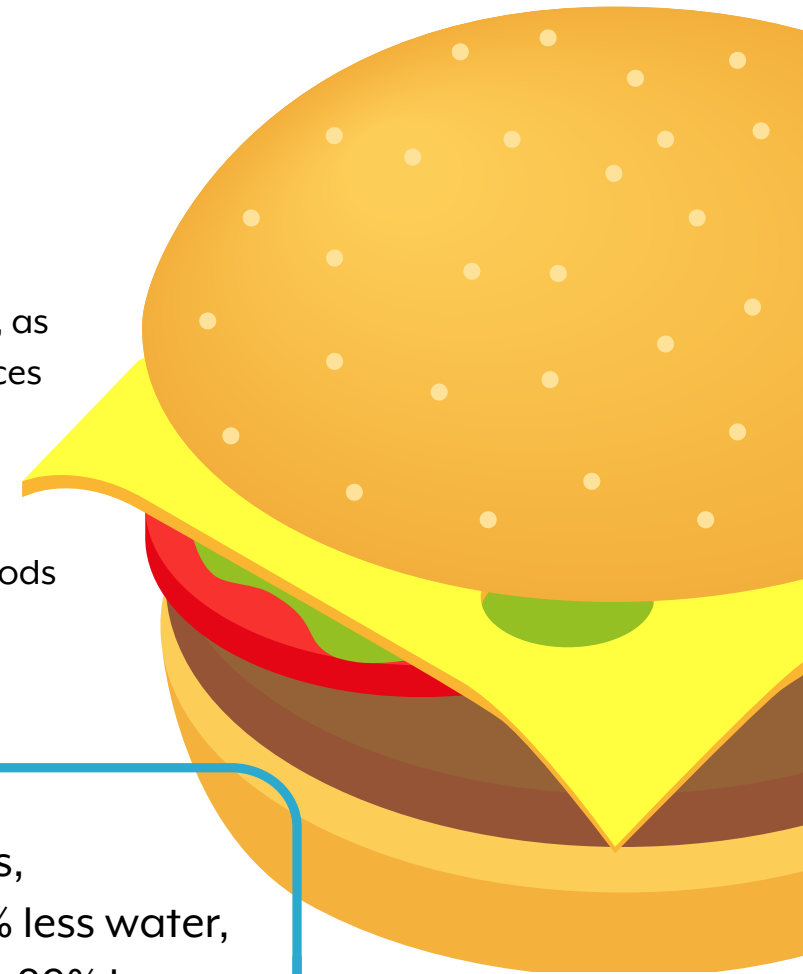
are trying to reduce plastic waste

Sustainability is the top need state among American consumers. 69% of the general population fall in the sustainability need state meaning they have adopted some eco-minded attitudes or behaviors. Eating plant-based is an attractive option to those seeking sustainability, as producing plant-based meats takes less resources than traditional meat.

Plant-based meat brands market their sustainability compared to meat. Impossible Foods includes this description with its product:



Compared to beef from cows, Impossible™ Burger uses 87% less water, 96% less land, and generates 89% less greenhouse gas emissions.



It’s Healthier for Me

Eating too much meat is linked to many negative health outcomes. Red meat especially is high in saturated fat, which can cause high cholesterol. Meat is a good source of protein, but plant-based alternatives offer a similar nutritional profile with less calories. Sometimes they offer additional added nutrients too. **83% of plant and animal-based meat eaters believe that plant-based meat alternatives are better for their health.** Plant-based meat consumers are more health-conscious than the average:



Eating plant-based meat for health reasons plays into the wider trend of food as fuel. It’s the belief that people can improve themselves through eating better. 65% of Americans agree functional foods can be substituted for medicine, and that goes up to 77% when looking at plant-based meat shoppers. These shoppers are looking to minimize the unhealthy ingredients they eat, as they are more likely to look for foods with low sodium, sugar, and fat.

Alternative meat is not exactly a functional food, but it’s marketed as low in calories, fat, and cholesterol. It serves the function of being meat-like without the perceived negative health consequences of eating conventional meat.

Plant-based meat shoppers look to supplement their diet and are more likely to use vitamins than the average American. They are also more likely to exercise regularly. Taking part in these preventative health practices aligns with their higher likelihood of believing functional foods can be medicine.





# Plant-Based Meat on the Market

Innovation in meat alternatives has made it taste and look like the real thing, making it easier than ever to make the switch. Consumers no longer need to learn how to cook and season tofu to take part in the sustainability of plant-based eating.

## The Classic Burger

Plant-based burgers have come a long way in the last few decades. Veggie burgers have existed in grocery stores since the 1970’s with brands like Lightlife and Morning Star Farms. New entrants into the space in the early 2010’s—like Impossible Foods and Beyond Meat—raised the bar with realistic, grill-able veggie burgers. Now, they’re not called “veggie patties,” they’re burgers made from plants that taste, cook, smell, and feel like the real thing.



Morning Star Farms  
Incogmeato Burger Patties



Impossible Foods  
Burger Patties



Beyond Meat Beyond Burger  
Plant-Based Patties



Sweet Earth  
Awesome Burger

From the Meat Brands Themselves

Though meat producers once scoffed at plant-based meat, they have jumped on the trend. Some launched plant-based brands in the US. Hormel launched Happy Little Plants and Tyson launched Raised & Rooted. Other meat producers are testing plant-based concepts abroad—like Cargill’s PlantEver in China.

Conagra Brands has taken an integrated approach, incorporating its own plant-based brand, Gardein, into its other brands—like Marie Callender’s and Healthy Choice. Even more creative is Perdue Chicken Plus. The famous chicken brand sells its nuggets with added vegetables, perfect for the plant and animal-based meat shoppers.



Happy Little Plants  
Unseasoned Plant-Based Product



Raised & Rooted  
Nuggets Made with Plants!



Marie Callender’s  
Meatless Be’f Pot Pie



Perdue Chicken Plus



More Options than Ever

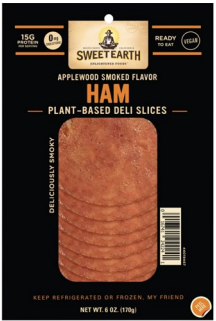
Alternative beef and chicken have been the norm, but innovative options have brought variety to the plant-based category. Consumers can enjoy everything from plant-based ham to drumstick off the “bone.” Even a meat-free ribeye steak could appear at your plant-based table.



Vegetarian Plus Vegan Lamb Vindaloo



The Herbivorous Butcher – The Ribeye



Sweet Earth Black Forest Ham Deli Slices



All Vegetarian Imitation Drumsticks

Focus on the Plant

Plant-based protein doesn’t all look like meat. There are thousands of options available—including jackfruit, tofu, and texturized vegetable protein (TVP). Though ingredients like these are used in plant-based meat lookalikes, some brands choose to market the meatless ingredients themselves.

Jackfruit and mushrooms are popular plant-based proteins, as they naturally mimic meat. The “meat” is not made, but instead shredded and flavored. Seitan is another meatless product that is naturally chewy and easily flavored.



The Jackfruit Company Lemon Garlic Jackfruit



Shroomeats Shroom Shred-it



Blackbird Foods Chili Lie Seitan



Foodies Vegan Chorizo Crumble Pumfu

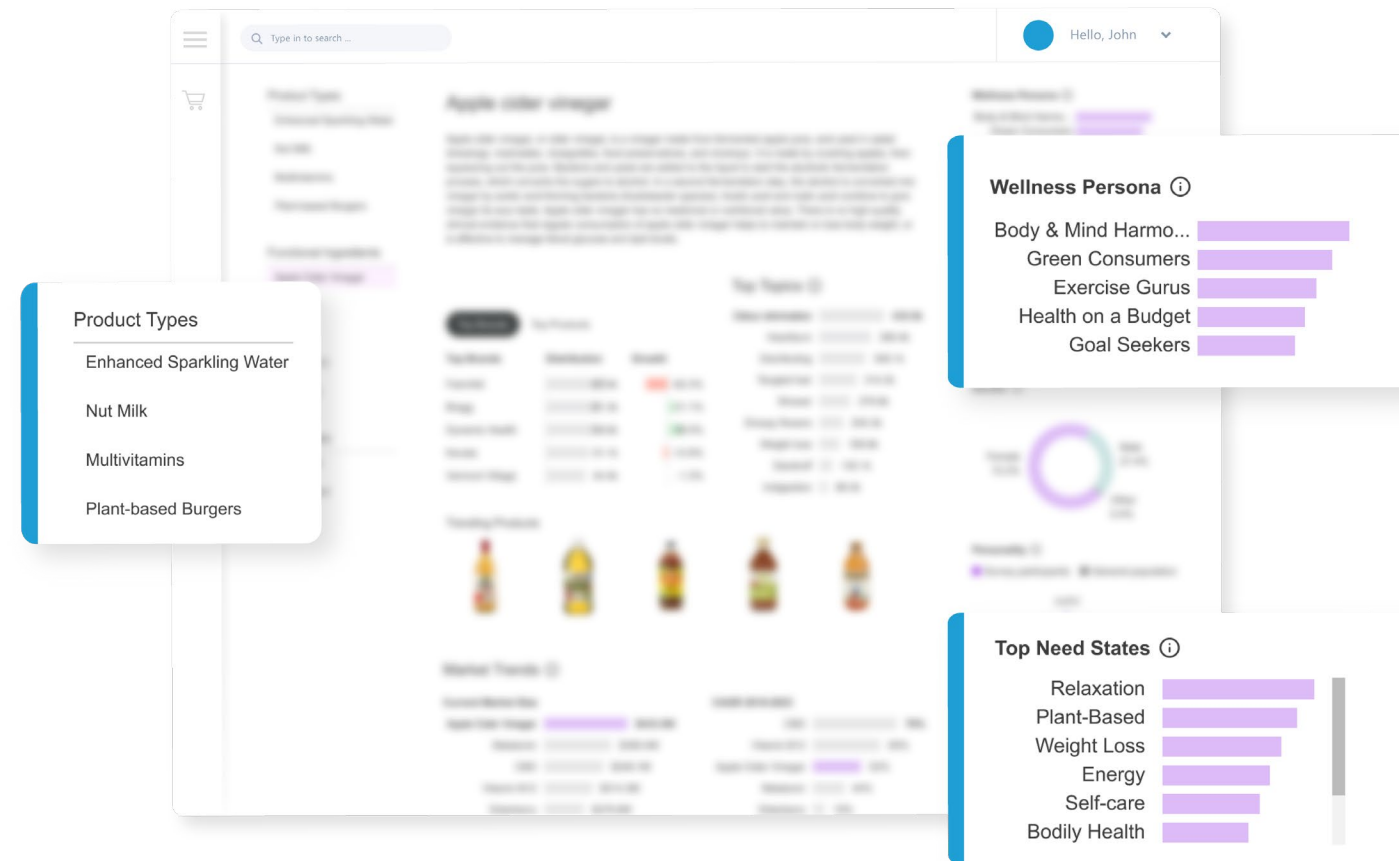
## Key Takeaways

Plant-based meat will only continue to gain popularity as consumers look to fulfill their need for sustainable foods and improved health. Comparable plant-based options for nearly every meat have made it easier than ever to switch away from meat—if consumers have the money to do so. More options mean more competition. Understanding that the plant-based meat shopper isn't strictly vegetarian is the first step. Knowing why shoppers choose one plant-based option over another will be what leads to success.



# Introducing Evergi, your integrated answer to innovation.

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**Brightfield Group** is the leading research firm for emerging categories including CBD, Cannabis, and Wellness. By integrating multi-source data with AI and research expertise into our cross-comparable data lake, we uncover robust insights as new markets develop. Since 2015, we have helped Marketing, Innovation, and Insights leaders drive customer-centric strategies on their next big idea.

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