



# **A NEW FAD: THE RISE OF PLANT-BASED PROCESSED DIETS**

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## The Rise of Plant-Based Processed Diets

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Account Planning

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## EXECUTIVE SUMMARY

Consumers' knowledge of plant-based processed diets have increased in recent years, leading them to expand the variety in their eating habits not only for the health benefits, but also for taste preferences of plant-based foods and environmental concerns. Opting for plant-based foods creates more of a positive impact on global sustainability efforts than traditional meat, for the per-unit production of plant-based processed meat requires substantially fewer resources.

With the growing popularity of plant-based processed diets, quick-service chains such as KFC and Burger King, have been adding plant-based foods to their menu. Because many of these items are cooked in the same kitchen appliances as their meat counterparts, such as Burger King's Impossible Whopper, there have been concerns about whether these meatless options are of better nutritional value. Brands have also been criticized for labeling their plant-based foods as "meatless meat" or with ingredient-focused names, and consumers have found them to be misleading. This has led nine states to ban the use of such labels in recent years. This report explores what is successful and what hasn't been effective in plant-based foods advertisements.

To appeal to consumers seeking alternatives to animal-based foods, it is essential for agencies to research plant-based diets and the targeted audience's lifestyles. Brands that are knowledgeable about plant-based diets and use precise terms are likely to communicate better with the audience and avoid controversies regarding their products. Words like "vegan" or "vegetarian" must not be used in advertisements unless there is truth behind the claims.

By conducting extensive research about plant-based diets, advertisers will understand how to be more transparent about their products with consumers while being able to make them appealing. Being truthful with consumers about what ingredients comprise the product and emphasizing its benefits will create a clear message to the consumer and ultimately produce a loyal customer base.

Advertisers must be careful when labeling plant-based products. While it's crucial to emphasize the benefits and ingredients of the product, brands must use accurate product names based on the ingredients on all advertisements to avoid confusion with the consumer. The target audience does not respond well to labels that compare the product to its animal-based counterpart such as "without meat" or "meatless."

Emphasizing the look and feel of plant-based products' packaging is key to amplifying the product's appeal to the target market. Initially, consumers are drawn to the appearance of a product. Brands must highlight the flavor of the product to prevent consumer assumptions that the product is tasteless or boring. In addition to the product's nutritional facts and environmental benefits, the packaging's design should also include a clear image of the product, surrounded by a variety of bright, fresh fruits and vegetables to produce healthy imagery. This will create positive attitudes among consumers toward the product.



## INTRODUCTION

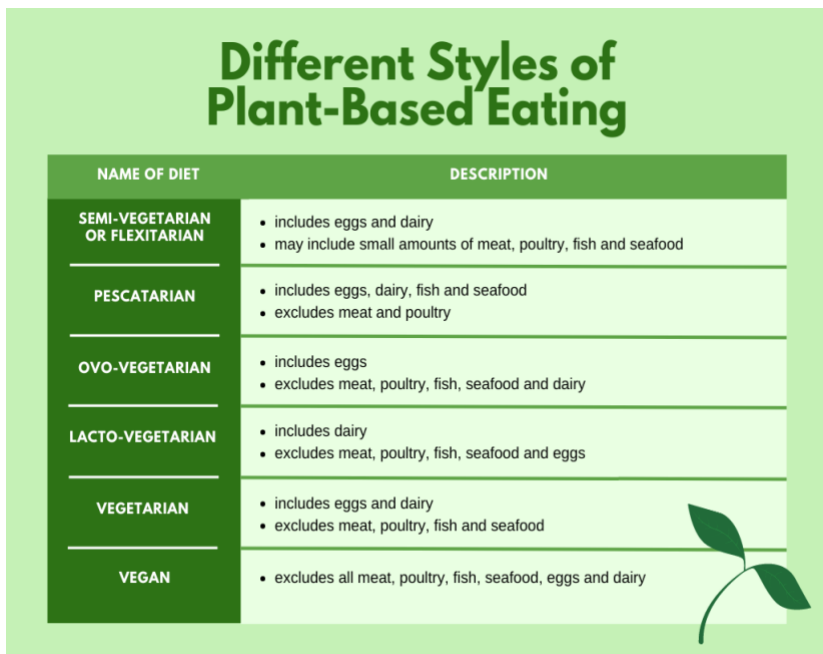
A plant-based processed diet is a diet consisting of foods that come mainly from plants and other natural sources (Clark, 2021). There are many variations of this type of diet, including vegetarianism, veganism, pescetarianism and flexitarianism.

These plant-based processed diets are on the rise, with one in four Americans claiming to eat more protein from plant sources than they did the past year (International Food Information Council, 2021).

Consumers are purchasing increasing amounts of meat and dairy alternatives for a variety of reasons, such as the health benefits, taste of plant-based processed foods, and sustainability, all of which are higher quality than meat-based foods. Other reasons include the desire to improve animal welfare (Nettle, 2020). Jack Sinclair, CEO of Sprouts

Farmers Market, stated that “the interest in plant-based foods and a flexitarian diet is evident. Shoppers are more engaged with their food than ever. [They] are seeking innovative and alternative products to mix up the meals they prepare for themselves and their families” (Joe, 2021). Research shows that the vegan food market is expected to reach \$31.4 billion by 2026, a 10.5% growth rate from 2019 (Thomas & Deshmukh, 2019).

Figure 1  
Different Styles of Plant Based Eating



NAME OF DIET	DESCRIPTION
SEMI-VEGETARIAN OR FLEXITARIAN	<ul style="list-style-type: none"><li>includes eggs and dairy</li><li>may include small amounts of meat, poultry, fish and seafood</li></ul>
PESCATARIAN	<ul style="list-style-type: none"><li>includes eggs, dairy, fish and seafood</li><li>excludes meat and poultry</li></ul>
OVO-VEGETARIAN	<ul style="list-style-type: none"><li>includes eggs</li><li>excludes meat, poultry, fish, seafood and dairy</li></ul>
LACTO-VEGETARIAN	<ul style="list-style-type: none"><li>includes dairy</li><li>excludes meat, poultry, fish, seafood and eggs</li></ul>
VEGETARIAN	<ul style="list-style-type: none"><li>includes eggs and dairy</li><li>excludes meat, poultry, fish and seafood</li></ul>
VEGAN	<ul style="list-style-type: none"><li>excludes all meat, poultry, fish, seafood, eggs and dairy</li></ul>

Meneses, 2022



As the consumption and selection of plant-based processed foods continues to grow, brands must assess how to position and advertise these products to its target audience. There have been several concerns from consumers about whether plant-based processed diets are more beneficial than other diets, like omnivorous diets. Many critics have found fault with restaurants that label plant-based foods on their menu as “meatless meat,” arguing that such foods are “ultra-processed junk foods” (Piper, 2019). To prevent restaurants from falsely advertising their plant-based menu items, states such as Missouri have introduced laws that ban plant-based processed food brands from calling their products “plant-based meat” or “plant-based milk” if they don’t include ingredients from animals (Shapiro, 2019). Brands and advertising agencies must analyze how to properly position such products in advertisements to accommodate this rising interest in plant-based processed diets and attract consumers unaware of these diets.

This report will explore consumer attitudes about the health benefits and sustainability of plant-based diets, which is essential to include in advertisements about plant-based processed foods. It will then be followed by providing insight on the current advertising strategies and market trends in plant-based diets. To conclude the paper, recommendations for companies seeking to enter the plant-based food market and attract this target audience will be presented.



## CONSUMER ATTITUDES TOWARD PLANT-BASED FOODS

Thanks to the evolving values of consumers, the market for plant-based food alternatives grows exponentially each year. For example, the plant-based meat market value is projected to increase to 3.6 billion by 2026. The plant-based milk industry doubled its sales from 2009 to 2015, then estimated to be worth about 21 billion dollars, and demand has only increased since the data was collected (Alcorta, 2021).

Research shows that there are many factors influencing consumers' preference for plant-based foods. Young adults, particularly women, are more likely to respond to advertisements that promote plant-based processed foods. The most commonly quoted reasons for making a dietary change are health benefits, environmental concerns, animal rights, and religious reasons (Alcorta, 2021). A 2020 study found that of all advertising strategies, providing information about the animal and environmental welfare had the most profound effect on consumers (Van Loo et al., 2020). Having a higher than average knowledge of nutrition also increases the likelihood of adopting a plant-based diet (Kopplin & Rausch, 2021).

An analysis of consumer attitudes from 2018 found those who do not follow a vegan or vegetarian diet view meatless alternatives as less appealing. When plant-based products use terms on their packaging such as “vegetarian”, “plant-based”, or “without meat”, omnivorous consumers view them as “tasteless” and “bad” (Trelohan & Stefan, 2018). This suggests that the

Figure 2  
Why Do Shoppers Choose Plant-Based Foods



Plant-Based Foods Association

plant-based processed foods market has room for improving the language of its advertising to reach consumers who are not on plant-based diets.



## SUSTAINABILITY

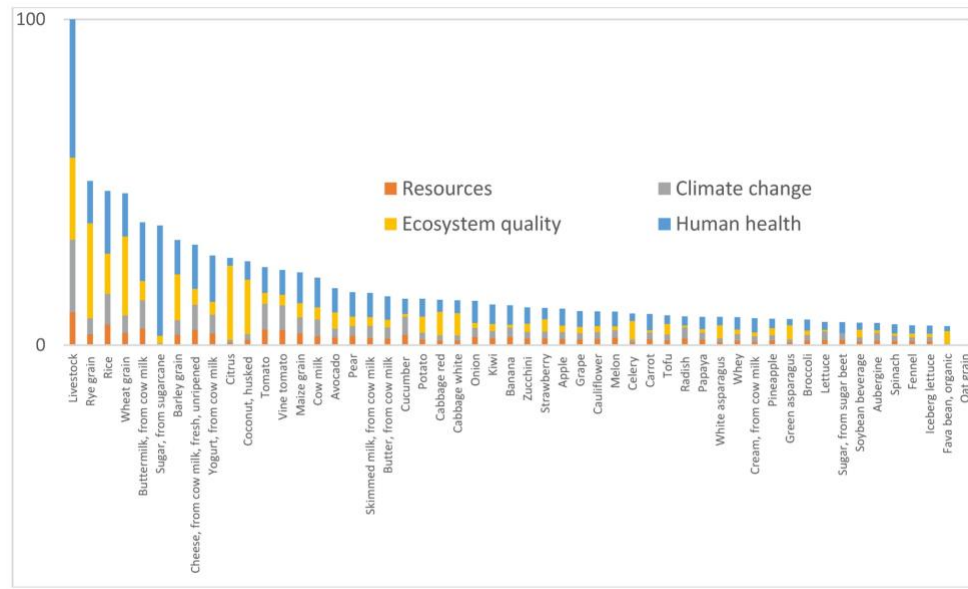
Sustainability is defined as the ability to be maintained at a certain rate. It can be more narrowly defined as the avoidance of the depletion of natural resources in order to maintain an ecological balance. Plant-based processed foods and diets have a positive impact on sustainability efforts globally. The Cereal & Grains Association writes on the consumption of plant-based processed meats as more sustainable to feed a considerably larger population. With the rapid growth of the Earth's population, this is a viable option looking into the future. Unlike its conventional meat counterpart, the per-unit production of plant-based processed meat requires substantially less agricultural land and water, emits less greenhouse gas, and produces less aquatic nutrient pollution (Cereal & Grains Association, 2020). These products can replace conventional meat products to help mitigate the challenges of global food security and environmental sustainability. A recent report estimated that plant-based processed meat and cultured meat together will account for 60% of the total meat market by 2040 (Cereal & Grains Association, 2020).



A 2020 article states that a “sustainable plant-based diet is necessary on a more regular basis to meet the climate target” and that this is proven by a test showing “that the highest environmental impact savings lie in the displacement of livestock by plant as a source of protein (Sadhukhan 2020). Figure 3 depicts life cycle environmental impacts (normalized, weighted, and scaled; daily serving applied) of food choices in numerical order. The chart shows how many resources are used in livestock production and how few environmental repercussions there are in plants. Sadhukhan also writes that “the traditional way products are designed promotes a linear economy that discards recoverable resources and creates negative environmental and social impacts” (Sadhukhan 2020).

Figure 3

## Environmental Impacts of Food Choices in Numerical Order



Sadhukhan, 2020

Through the production and consumption of plant-based processed food products, we can improve sustainability efforts and use less resources. Waste generation can be avoided, and a circular economy can be achieved in the food supply chains for a sustainable 21st Century.



## PLANT-BASED PROCESSED FOOD CONCERNS

### Label Bans

With the growth and popularity of the plant-based processed food market, there has been a debate over the use of traditional meat terminology on the labels of alternative meat products

such as plant-based burgers (Pitkoff, 2021). Pitkoff found that nine states have passed laws banning brands selling plant-based products from using such labels. These bans, to which the extent varies from state to state, are separated into two categories: bans that unambiguously apply only to unqualified uses of traditional terminology and bans that are ambiguous as to whether they might also apply to qualified uses. Pitkoff listed three sample prohibitions: a ban inclusive of qualified labels, e.g. “vegan beef”, a ban on non-qualified labels of cell based products, e.g. “beef” unqualified when the product is cell based; and a ban on non-qualified labels of plant-based products, e.g. “beef” is unqualified when the product is plant-based (Pitkoff, 2021).

## Quick Service Chains

As the market for plant-based processed foods rises, quick-service chains are gripping on to the trend. However, some quick-service chains such as Burger King and KFC, are not considered to be 100% vegan, which poses concerns for many consumers who adopt plant-based diets. Burger King announced the Impossible Whopper in 2019 in addition to their line of burgers, offering a flame-grilled patty made from plants. According to Lyn Mettler in an article in 2020, “since vegans traditionally avoid eggs, the Impossible Whopper was quickly dismissed as a legitimate vegan fast-food alternative since the burger is topped with mayonnaise.” While the burger itself contains no meat, Burger King acknowledged that the Impossible patties are flame-grilled on the same broiler as its chicken and beef products, meaning the meatless burger will likely come into contact with bits of meat and poultry as it cooks (Mettler, 2020). For these reasons, meat alternatives at restaurants can be a concern for people with vegetarian or vegan diets. Another quick-service chain that may pose concerns is KFC’s Beyond Fried Chicken. KFC announced Beyond Fried Chicken Nuggets in 2019, a “meatless” alternative to the animal-based chicken. Founded in 2009, Beyond Meat products are designed to have the same taste and texture as animal-based meat while being better for people and the planet (KFC, 2022). While KFC’s Beyond Fried Chicken is plant-based, it’s not prepared in a vegan or vegetarian way, Yum Brands said in a press release. The plant-based chicken is cooked in the same fryer as the animal-

based ingredients served at KFC, which is highly unfavorable to plant-based diet consumers (Bartiromo 2022).

In addition to this, there is not a large difference in the nutrition behind the meatless burgers in quick-service restaurants. According to a 2021 Nature Hub article, “any nutritional differences between a fatty meat burger and a meatless

burger

are

minimal.

While a

meatless

burger

contains

zero

contains

just as

protein,

carbs,

also has a similar caloric profile” (Titterington, 2021).

Figure 4  
Burger King Announces Impossible Whopper



Figure 5  
KFC Debuts Plant-Based Chicken Chainwide

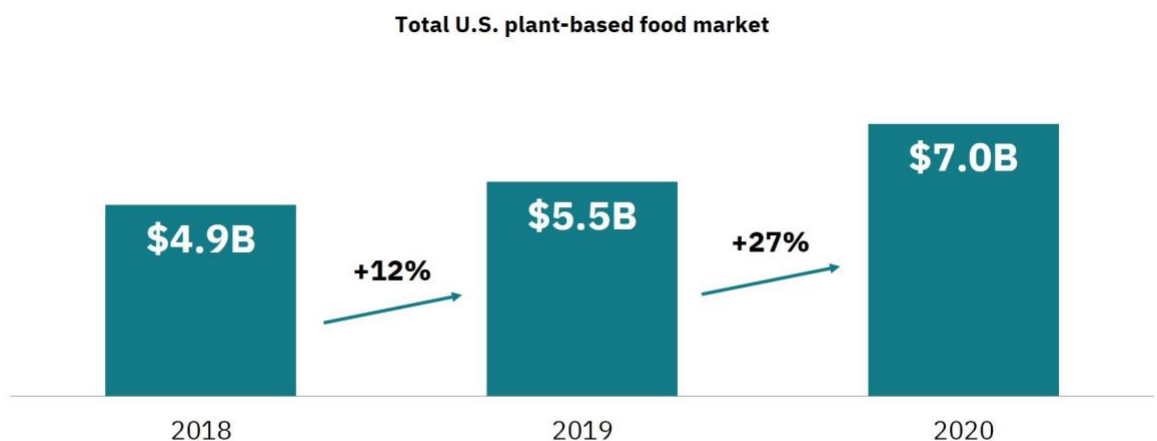


AdWeek, 2022

meat, it  
almost  
much fat,  
and  
and it

## MARKETING STRATEGIES

Plant-based processed foods are one of the fastest growing food industries across the globe. As the demand for plant-based alternatives increases, so does the need for marketing.



Note: the data presented in this graph is based on custom GFI and PBFA categories that were created by refining standard SPINS categories. Due to the custom nature of these categories, the presented data will not align with standard SPINS categories.

Source: SPINS Natural Enhanced Channel, SPINS Conventional Multi Outlet Channel (powered by IRI) | 104 Weeks Ending 12-27-2020

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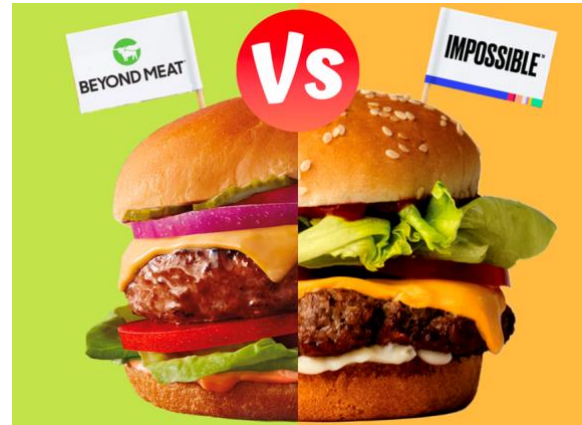


In a 2019 ScienceDirect study, three different approaches to marketing plant-based processed foods were tested. The first finding showed that when these foods were marketed based only on the ingredients used in the meatless alternatives, “associative networks are less complex and associations are primarily concerned with taste” (Peschal et al., 2019). [They] then tested when “health” was the main focus of the marketing strategy. The results showed participants to be more concerned about other factors such as the processing degrees and nutrition of the product, and had a more complex associative network. The third study focused on communicating sustainability. This resulted in fewer associations of concerns with the product and its properties, but interest in other issues such as “environmental impacts and authenticity of the product” (Peschal et al., 2019). Understanding how consumers feel about different forms of plant-based processed food communication can be used by advertisers to tailor advertisements that better suit this audience.

The term “healthy” is widely debated and typically defined by consumers in the plant-based processed foods market. The definition and understanding of the meat substitute industry

is not solid. There are three major types of customer bases for the plant-based processed food market: “vegans, vegetarians, and meat-eating consumers wishing to eat less meat or become completely non-meat eating” (Choudhary, 2020). Beyond Meat and Impossible Foods are the two largest plant-based food brands in the substitute meat market industry, according to the Reuters Business Review. Beyond Meat products are commonly found in major retail outlets such as Walmart, Target, and Dunkin. Whereas, Impossible Foods focuses on selling its products solely to restaurants. There are many differences between the two industries, but much to learn by looking at both. (Figure 6) For example, Choudhary states that Beyond Meat may be able to sustain its advantages by developing and marketing new products and improvements to its existing products while continuing to provide environmental sustainability benefits.

Figure 7  
Side By Side Comparison of a Plant-Based Burger  
Made From Beyond Meat vs. Impossible Foods



Green Queen, 2021

A Mintel report focused on consumers who are looking for “more whole foods-based protein solutions” examined the growing opportunities of plant-based protein, especially with fathers, and how to provide consumers with the variety they seek via new formats and flavor profiles. It found that the plant-based processed food industry encountered a major boost in sales in 2020, in response to “the variety they provided as consumers cooked at home more often during the lockdown period” (Mintel, 2020).

The term “plant-based diet” is typically correlated with “health” and the term is exploited for marketing purposes. This has led to a commonly held view among consumers that plant-based processed foods are healthier alternatives to meat. A study that looked into the “imagery depicting healthy content versus unhealthy content would lead to more favorable product attitudes towards plant-based proteins” showed that healthy imagery can be used in marketing and advertising to induce more positive product-related attitudes and emotions (Banovic & Otterbring, 2021). The mechanism explaining such results is increased arousal levels among consumers exposed to health-related content. As such, positive framing of marketing messages would increase the likelihood of purchases.



## RECOMMENDATIONS

### 01. Use accurate terms. Research the diets and lifestyles of target audiences

- \* Publishing advertisements that claim that plant-based processed foods are “vegan” or “vegetarian” must contain the truth behind the claims. It harms the reputation of the brand to claim that their products are “vegan” or “vegetarian” when they are not. For example, Burger King and Kentucky Fried Chicken made false claims because their products had been cross-contaminated with animal products. Therefore, the research team behind the company should focus on the definitions of each diet and understanding the lifestyles of their targeted audiences. They should better communicate to the audience that their product may have been cross-contaminated with animal products rather than leaving out that information.

### 02. Be transparent with consumers

- \* Establishing transparency with the consumer is essential to cultivating a loyal customer base, by defining what is inside plant-based processed products and emphasizing the benefits a relationship will begin to build. Plant-based meat requires “less agricultural land and water, emits less greenhouse gas and produces less aquatic nutrient pollution,” contributing to sustainability efforts. Each plant-based product is varied, and being truthful with what ingredients comprise the product will create a clear message to the consumer.

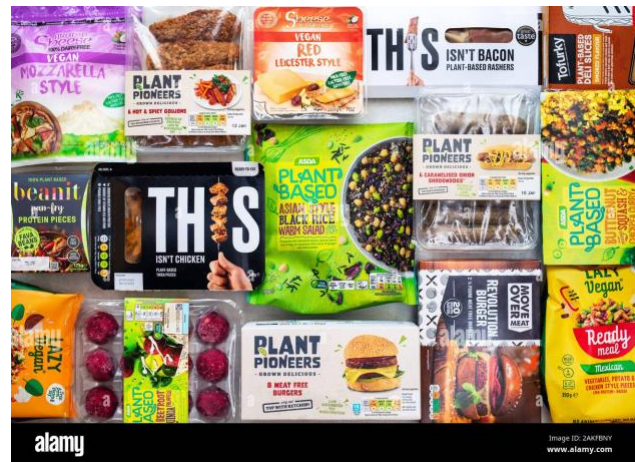
### 03. Use the right words

- \* Consumers have a negative reaction to labels like “vegetarian” or “without meat” (Trelohan & Stefan, 2018). The target market also takes issue with the phrase “meatless meat” (Piper, 2019.) Plant-based advertising that has the best effect on consumers emphasizes the health benefits of the product and evokes feelings of curiosity (*How Brands Are Serving*, 2020). Based on this, advertisements should use accurate product names based on their ingredients to avoid confusion with the consumer and then hopefully pique their interest.



#### 04. Increase appeal factor by highlighting the flavor

- \* Emphasizing the look and feel of a plant-based processed product will increase its attractiveness and make it stand out among its competitors. When labeling a plant-based product, highlight the flavor more than the ingredients or health benefits to prevent consumers from viewing the product as tasteless or boring. Use bright colors and surround the product by a variety of fresh fruits and vegetables on the packaging to produce healthy imagery, which was shown to be effective in increasing positive attitudes among consumers toward the plant-based product. Nutritional facts and environmental benefits of the plant-based product should also be accentuated to appeal to consumers' desire to eat foods that are nutritious and tasty while also promoting sustainability.



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