



Trend SPARKS



Plant Nutrition

A Fast-Growing Lifestyle

Plant-Based was the fastest growing descriptor on US menus in 2019

Source: Datassential, 2020

Plant Nutrition, a Lifestyle for Healthy Living

The excitement around plant-based has gained immense traction among consumers. Plant nutrition has become a consumer preferred lifestyle, aimed at achieving optimal health and wellness goals for healthy living and aging.

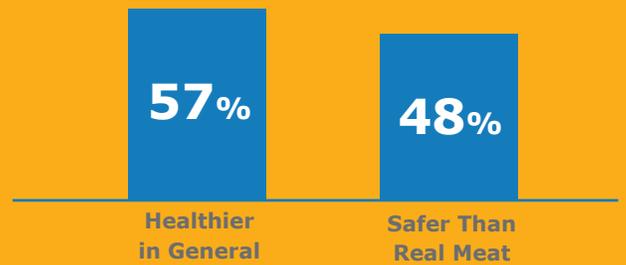
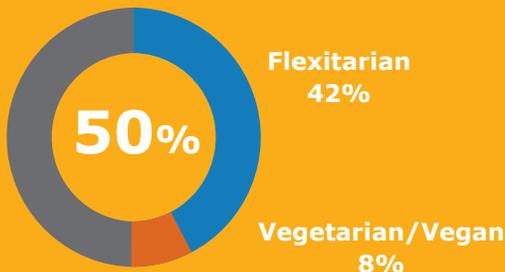
Consumers' adoption of a plant-based lifestyle has been built on long-term complementary trends originating with the movement around natural and clean food and evolving to today's emphasis on sustainability, traceability, and promoting animal and environmental welfare.

Half of US Consumers Follow a Plant-Based Lifestyle

Consumers are manifesting elements of plant-based nutrition into their daily eating habits stretching from flexitarian, vegetarian or vegan lifestyle approaches.

Covid-19 First Time Plant-Based Buyers Top Purchase Motivators

Carefree
*don't follow any food lifestyle/diet



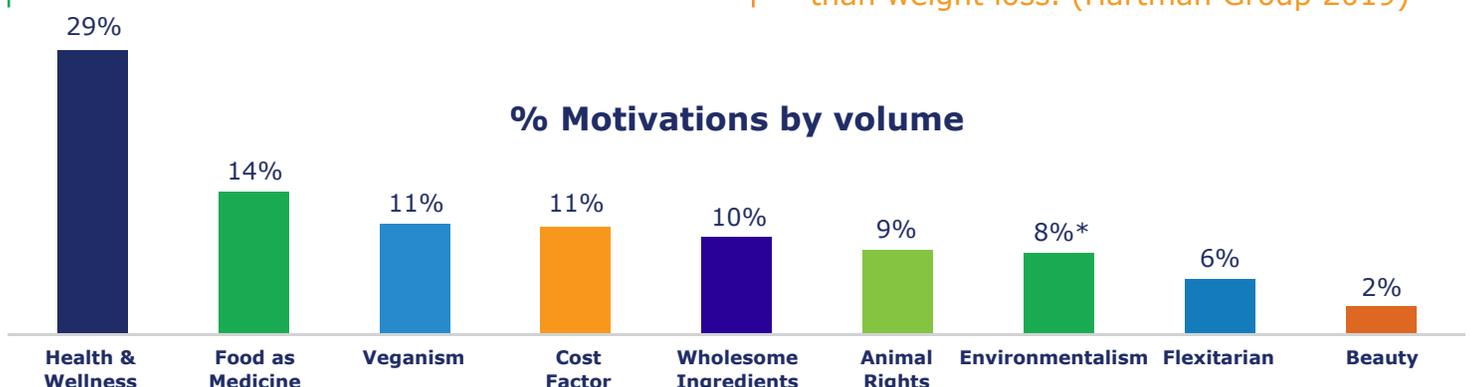
Source: ADM OutsideVoiceSM Survey, Nov 2019

As we emerge into a post-COVID-19 world, the motivations of health and safety behind plant nutrition lifestyles is even more important

Source: Nielsen

Motivations for Plant-Based Living

- **Maintaining Health & Wellness** by far is the greatest motivation to eat plant-based
- **Weight control while getting healthier** is the top priority for those starting plant-based diets
- **Women** are more likely to be motivated for **health and wellness**.
- **Millennials & Gen Z** show a preference for "lifestyle" diets focused on **wellness, sustainability or animal welfare** rather than weight loss. (Hartman Group 2019)



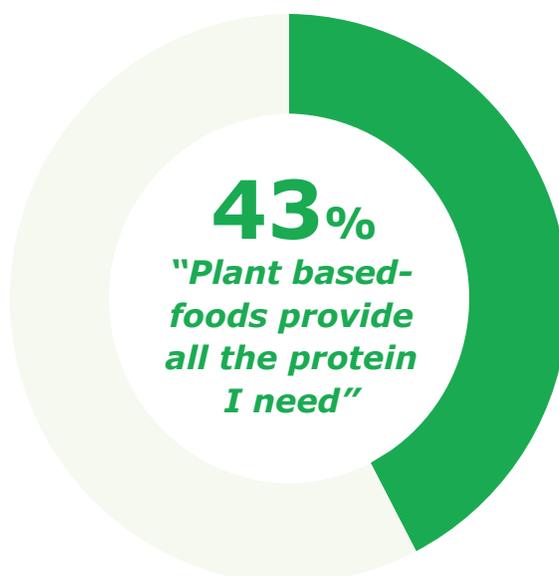
Source: Brandwatch, March 2020 data for English speaking countries' online conversations



Trending Consumer Opportunity Areas for Plant Nutrition Innovation:

Nutrient-Dense Nutritional Profiles

- Consumers are looking for more positives – especially through **improved nutritional profiles** and **shorter ingredient lists**
- **43%** of consumers agree that **“plant-based foods can provide all the protein I need”**
(Source - Mintel 2020)
- For protein occasions, the **#1 needstate** is **positive nutrition**
(Source - Hartman Group 2019)



Functional Benefits for Digestibility & More

- Consumers are seeking **more value-added solutions – take better-for-you and make it best-for-you with improved functional health and wellness claims**
- According to ADM’s OutsideVoiceSM (2019), consumers are **motivated** to pursue a plant-based diet for **improved gut health/digestibility**
- For protein occasions the **#2 needstate** is **Functional Benefits**
(Source-Hartman Group 2019)



Wholesome, Whole Food Ingredients From Nature

- The need for traceable, **transparent sourcing from-the-natural source** couldn’t be more critical to today’s changing society
- The majority of consumers feel that **whole plant foods** (i.e. beans) are **healthier...** Brands focusing on beans, grains, and seeds as primary ingredients may appeal to a broader audience moving forward (Source – Mintel 2019)

