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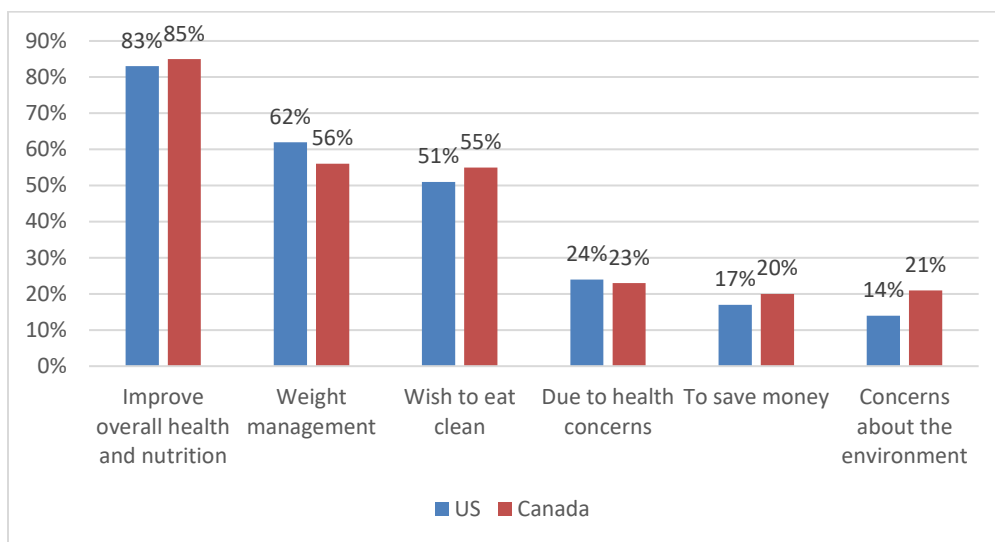
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# SYNERGY - UNDERSTANDING THE PLANT-BASED CONSUMER

The plant-based food trend continues to be strong heading into 2021. This evolution evolves around consumers wishing to understand where their food comes from, and a desire to eat cleaner, leaner and have less impact on the environment with the choices they make. A recent report by BIS research estimated that the plant-based market will reach \$480.43B by 2024, with a projected CAGR of 13.82% from 2019 to 2024.<sup>1</sup> Sales of plant-based protein products in Canada grew 7% to more than \$1.5 billion in 2017. That same year, Nielsen reported 43% of Canadians are looking to add more plant-based foods into their diet.<sup>2</sup> Though animal protein still packs a volume punch, plant-based proteins are driving growth in Canada, (+7% plant-based vs. +2% animal).<sup>3</sup> Across Canada only 23% of plant-based sales are sold on discount, much lower than the total FMCG Canadian average of 38.8%.<sup>4</sup>

**Key Factors for Following a Plant-based Diet are Health and Nutrition<sup>5</sup>**



While the plant-based movement is undeniably mainstream, the motives for consumers driving the growth of these products are personal, and understanding them is the key to ensuring the brand’s success. This special report summarizes Synergies ([www.synergytaste.com](http://www.synergytaste.com)) study of this consumer titled: “Understanding the Plant-based Consumer”.

### Plant-based Consumer Segments

#### 1. *Mainstream Plant-based Consumer:*

- Do not underestimate this consumer. 98% of consumers who purchase meat alternatives, also purchase meat.
- For a variety of reasons ranging from health advantages to curiosity, these consumers are looking to expand their dietary horizons and give plant-based foods a try.
- Their expectations when sampling a meat substitute may be narrow. The whole package, from taste to texture to eye appeal, will need to meet the expectations of these consumers.

#### 2. *Intrigued Consumer:*

- The “buzz” is everywhere about plant-based foods. With plant-based food sales growing 14x faster than traditional food sales, consumers are intrigued to taste.
- 20% of Synergy participants identified themselves as “intrigued”.
- To win their favour, the product must strike a balance of taste and function.

### 3. *Flexitarian:*

- One-third of Synergy participants identified themselves as flexitarian (This person will eat meat or dairy but is primarily choosing plant-based foods and beverages). According to FMI's Power of Meat 2019 report, this category of consumers is growing, especially among younger generations.
- Flexitarian diet breakdown by consumer segment:
  - Boomers: 6%.
  - Gen Z: 13%
  - Millennials and Gen X: 10%.
  - Women are more inclined to be flexitarians than men.
- Aside from health benefits, sustainability is helping to drive the flexitarian trend.
- They are likely to compare the taste of plant-based products to the gold standard flavor and texture accomplished with real dairy or meat ingredients.

### 4. *Vegetarian:*

- This consumer embraces a lifestyle that treads lightly on the planet with a focus on being cruelty-free. These consumers say no to meat and poultry. Some eat fish occasionally, others, never.
- 2.3 million Canadians followed a vegetarian diet in 2018<sup>6</sup>
- This consumer segment eats a wide variety of plant-based foods. The term plant-based is winning favor among consumers because it sounds less restrictive than vegetarian.

“Research from Technomic showed that 58% of consumers would rather buy plant-based foods. Only 49% would purchase vegetarian”

### 5. *Vegan:*

- This consumer embraces a lifestyle that's dedicated to sustainability and the environment.
- This consumer is drawn to simple, clean label offerings that provide transparency to all ingredients used or a third-party certification
- 0.85 million consumers classed themselves as a vegan in Canada.<sup>7</sup>
- Though this consumer segment is extremely small, do not avoid them. The global vegan market size was valued at \$14.2 billion in 2018 and is expected to reach \$31.4 billion by 2026. This represents a CAGR of 10.5% from 2019 to 2026.

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<sup>1</sup> Five Major Trends Driving the Plant-based Food Market, [www.foodbev.com](http://www.foodbev.com), January 2020

<sup>2</sup> FCPC Launches Plant-based Food Group, [www.canadiangrocer.com](http://www.canadiangrocer.com), September 2018

<sup>3</sup> Consumption Habits are Evolving, Carman Allison, Grocery Business, March / April 2020

<sup>4</sup> Growing Plant-based Foods, Carman Allison, Grocery Business, July / August, 2019

<sup>5</sup> Why Plant-based Protein? Yves Strategic Leadership, 2019

<sup>6</sup> Vegetarian and Vegan Population Canada, [www.statista.com](http://www.statista.com), 2018

<sup>7</sup> Vegetarian and Vegan Population Canada, [www.statista.com](http://www.statista.com), 2018

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## FOOD DISTRIBUTION GUY PROFILE

Food Distribution Guy provides industry expertise and creative strategies for emerging and established food businesses that assist them in breaking through the competitive landscape and “Getting and Staying” listed in the grocery and health store sector. Our role is to help ensure your success is sustainable in the long-term & to assist you in obtaining the distribution of your products through the appropriate channels (traditional grocery, health stores, mass merchandiser, club, general merchandise, C-stores) available for retailing your product.

Richard Baker is CEO and Founder of Food Distribution Guy. He is a skilled strategic branding and award-winning marketing expert who assists food and beverage manufacturers to break through the competitive landscape in the grocery sector and achieve distribution.

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