



PLANT-FORWARD OPPORTUNITY

A Datassential report
in collaboration with
The Culinary Institute of America



Menu makers need to look beyond burgers to see plant-forward eating trends ripe for innovation.

The growth in menu penetration for burger substitutes has broken new ground for plant-based alternatives. But don't let the popularity of those items obscure something important: Most consumers eat meat, and if they dial back their meat consumption, they're more likely to go the flexitarian route than to go all the way to a vegetarian or a vegan diet.

Plant-forward is a trend The Culinary Institute of America has been tracking ahead of its Menus of Change conference and the recent release of its "Plant-Forward by the Numbers" report. Given the current state of the industry, the goal is now to understand: how is this consumer macro-trend tracking five months into the pandemic?

The result of CIA's research and this study is a big-tent approach that recognizes vegetarian and vegan preferences, with an acknowledgement of an even bigger opportunity for change: the food industry can build on the already shifting preferences of a larger part of the population wanting to eat less meat and fewer animal-sourced foods, without eliminating those foods altogether.

There is plenty of demand to meet just by developing flexitarian menus. Consumers like having alternatives, and plant-forward items serve this purpose more holistically than vegetarian or vegan offerings by themselves. So how can foodservice leaders pick the low-hanging fruit? Read on.



PRINCIPLES OF HEALTHY, SUSTAINABLE MENUS



BE TRANSPARENT ABOUT SOURCING AND PREPARATION

BUY FRESH SEASONAL LOCAL GLOBAL

REWARD BETTER AGRICULTURAL PRACTICES LEVERAGE GLOBALLY INSPIRED, PLANT-FORWARD CULINARY STRATEGIES

FOCUS ON WHOLE, MINIMALLY PROCESSED FOODS

GROW EVERYDAY OPTIONS, WHILE HONORING SPECIAL OCCASION TRADITIONS

LEAD WITH MENU MESSAGING AROUND FLAVOR

REDUCE PORTIONS, EMPHASIZING CALORIE QUALITY OVER QUANTITY

CELEBRATE CULTURAL DIVERSITY & DISCOVERY DESIGN HEALTH AND SUSTAINABILITY INTO OPERATIONS AND DINING SPACES

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MAKE WHOLE, INTACT GRAINS THE NEW NORM
THINK PRODUCE FIRST **LIMIT POTATOES**

MOVE LEGUMES AND NUTS TO THE CENTER OF THE PLATE

CHOOSE HEALTHIER OILS GO "GOOD FAT," NOT "LOW FAT"
SERVE MORE KINDS OF SEAFOOD, MORE OFTEN
REIMAGINE DAIRY IN A SUPPORTING ROLE

USE POULTRY AND EGGS IN MODERATION
REDUCE ADDED SUGAR
SERVE LESS RED MEAT, LESS OFTEN

CUT THE SALT RETHINK FLAVOR DEVELOPMENT FROM THE GROUND UP
SUBSTANTIALLY REDUCE SUGARY BEVERAGES, INNOVATE REPLACEMENTS
DRINK HEALTHY: FROM WATER, COFFEE, AND TEA TO (WITH CAVEATS) BEVERAGE ALCOHOL

DESIGNED BY J. BRINIGHT DESIGN

PLANT-FORWARD

For this report, plant-forward indicates a style of cooking and eating that *emphasizes and celebrates*, but is not limited to, plant-based foods. Those include fruits and vegetables (produce); whole grains; beans, other legumes (pulses), and soy foods; nuts and seeds; plant oils; and herbs and spices. Plant-forward menu development reflects evidence-based principles of health and sustainability.

Data collected from an online survey of 1,000 U.S. consumers, fielded online in July 2020.



With **guasacaca** sauce from Venezuela, **avocados** make a smash on more than just toast.

Gen Z and Millennials love their avocado toast (some stereotypes are true, after all), but the ubiquitous fruit still has many new applications capable of surprising trend watchers. Take guasacaca, a tangy and bright dip or sauce made from an avocado base.

CPG startup Kumana has begun selling guasacaca-inspired avocado sauces in the United States, with flavors like Be Original, Be Hot, or Be Mango. The burgeoning Venezuelan-food scene in cities like Austin, Texas, also feature guasacaca and avocado salsa, served by food trucks aiming to make arepas and street foods like pepitos more mainstream.



Meatless horserace tightens up as **Impossible Foods** rolls out its **plant-based sausage**.

After test marketing and soft-launching in select Burger King restaurants in early 2020, Impossible Foods announced in July that its meatless sausage would be available nationwide in restaurants and carried by major distributors. It was the first new product to roll out for the company since the debut of the Impossible Burger in 2016. At the time of the announcement, Impossible Foods said it had already expanded distribution of the sausage product to 20,000 locations.

Beyond Meat previously partnered with Dunkin' Brands to develop the Beyond Sausage Sandwich, which rolled out to more than 9,000 locations in November 2019.



Chipotle Mexican Grill tests **cauliflower rice**.

Unable to capitalize on the zucchini noodle trend that took the fast-casual restaurant segment by storm the past few years, Chipotle nonetheless is at the forefront of another plant-based substitute: cauliflower rice.

The chain announced in July 2020 that it would test market Cilantro-Lime Cauliflower Rice as a grain-free option for its burritos and bowls, starting with a few dozen locations in Colorado and Wisconsin. For a \$2 upcharge, customers can customize their orders with cauliflower rice and more easily tailor their meals to ketogenic, paleo, Whole30, or vegetarian or vegan diets. The brand also had launched a “supergreens” salad mix of baby kale, baby spinach, and romaine in January.

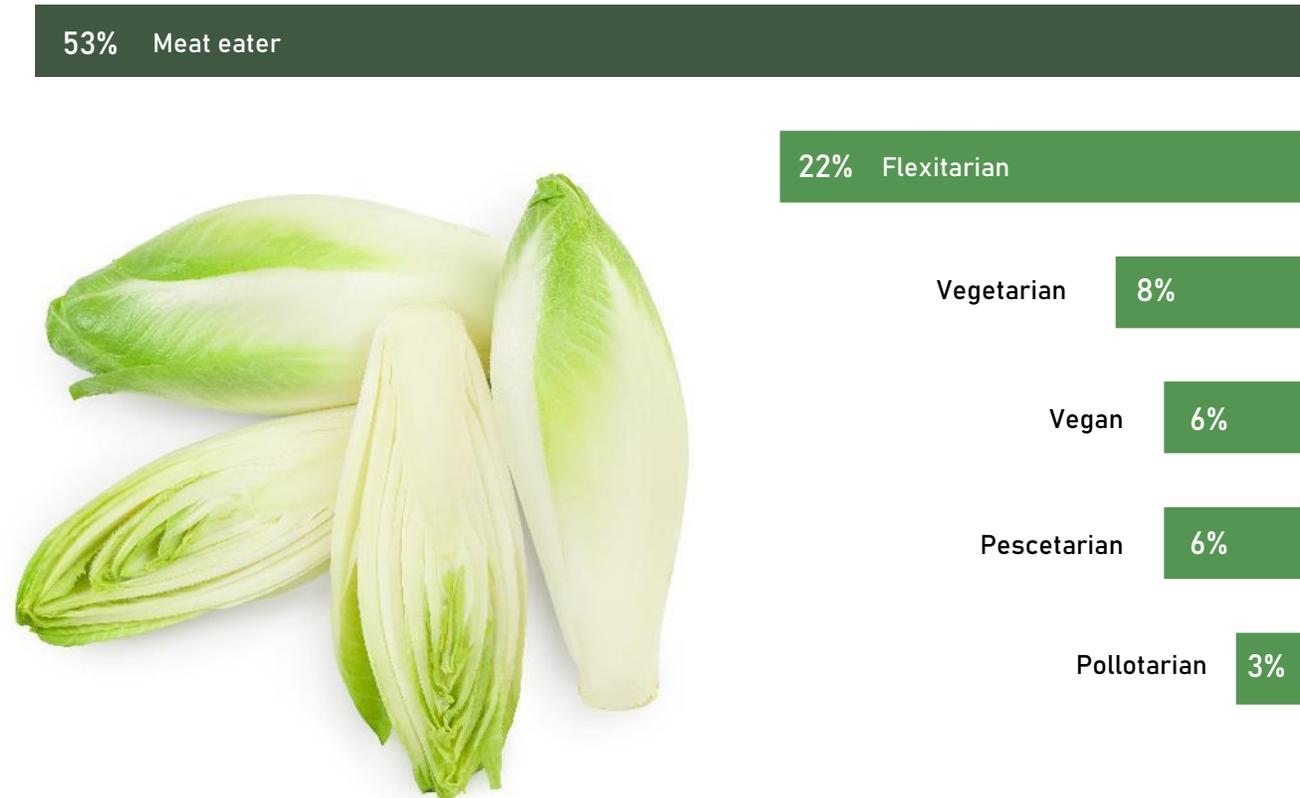
Vegetarian and vegan remain niche eating styles; however, nearly half of people aspire to eat less meat in some way.

Most of us eat meat, but the “flexitarian” diet has strong appeal, and other eating styles have room to grow.

which best describes the way you eat today?

	TOTAL	GEN Z	MILLENNIAL	GEN X	BOOMER
MEAT EATER	69%	64%	63%	72%	77%
FLEXITARIAN	14%	17%	16%	14%	10%
VEGETARIAN	5%	4%	7%	7%	1%
VEGAN	3%	5%	4%	2%	2%
POLLOTARIAN	3%	4%	4%	2%	2%
PESCETARIAN	3%	3%	3%	2%	3%
OTHER	2%	2%	3%	1%	4%

which of the following best describes the way you would like to eat?



The most appealing plant-based option? Plants.

While one-third of people look to eat more meat analogues, including two in five Millennials, most consumers plan to increase their intake of fruits, veggies, nuts, and whole grains, while not many are trying to cut their consumption of certain foods.

	INCREASE YOUR INTAKE	NOT CHANGE YOUR INTAKE	DECREASE YOUR INTAKE	
Plant-based foods (fruits, vegetables, nuts, whole grains)	58%	38%	4%	← Millennials (67%) more likely to INCREASE intake
Seafood	41%	50%	9%	
Plant-based meat substitutes / analogues	33%	51%	16%	← Millennials (40%) more likely to INCREASE intake
Poultry	30%	58%	12%	
Red meat	21%	48%	31%	

for each of the following types of protein, are you trying to...



	TOTAL	MEN	WOMEN
I would try more dishes mixing animal and plant proteins	67%	71%	64%
Plant-forward or flexitarian eating means favoring foods from plant sources and substantially reducing foods from animal sources, but not necessarily becoming vegan or vegetarian	63%	67%	59%
I prefer animal-based protein	61%	68%	54%
Animal-based protein is a more complete source of protein	57%	68%	48%
Animal-based protein is a more healthful source of protein	50%	59%	43%

do you agree with...

Plants lack protein-rich perception.

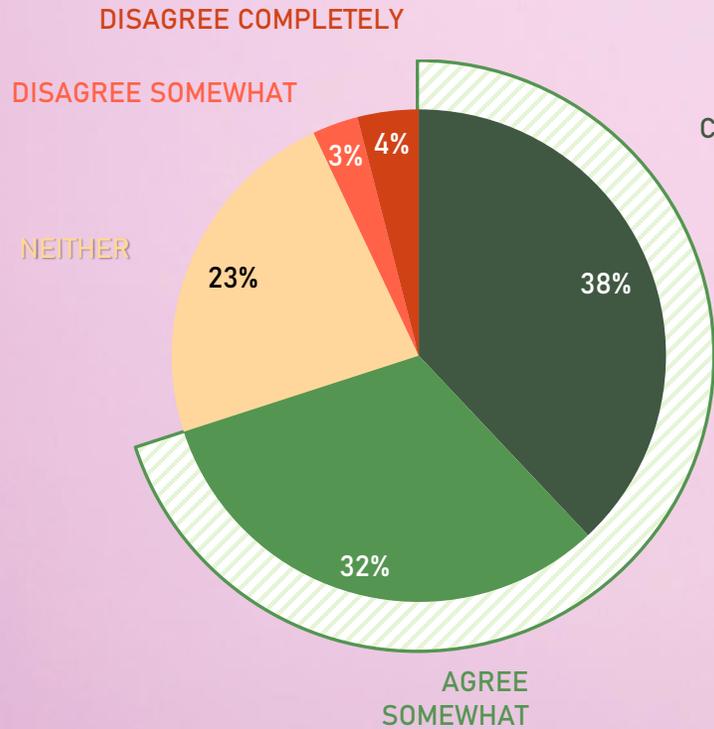
However, **two-thirds of consumers** would experiment with plant-forward dishes, including men, who are more likely to prefer animal sources of protein. Boomers were less likely to try options mixing in plant-based proteins with regular meat.

Plant-forward eating seems better to consumers.

If society reduced consumption of meat and increased consumption of plant-based foods...

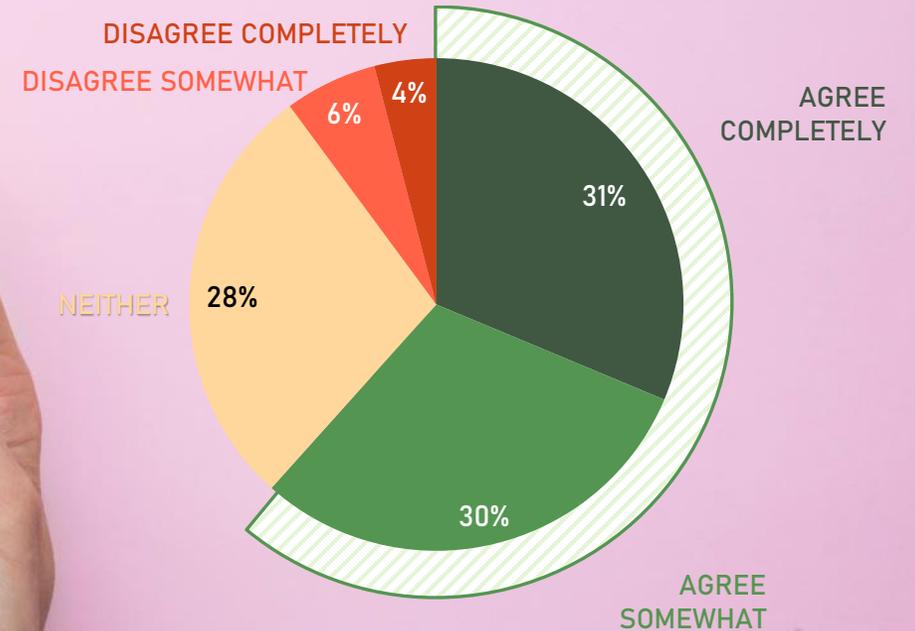
70%

OF CONSUMERS AGREE WE WOULD BE HEALTHIER



62%

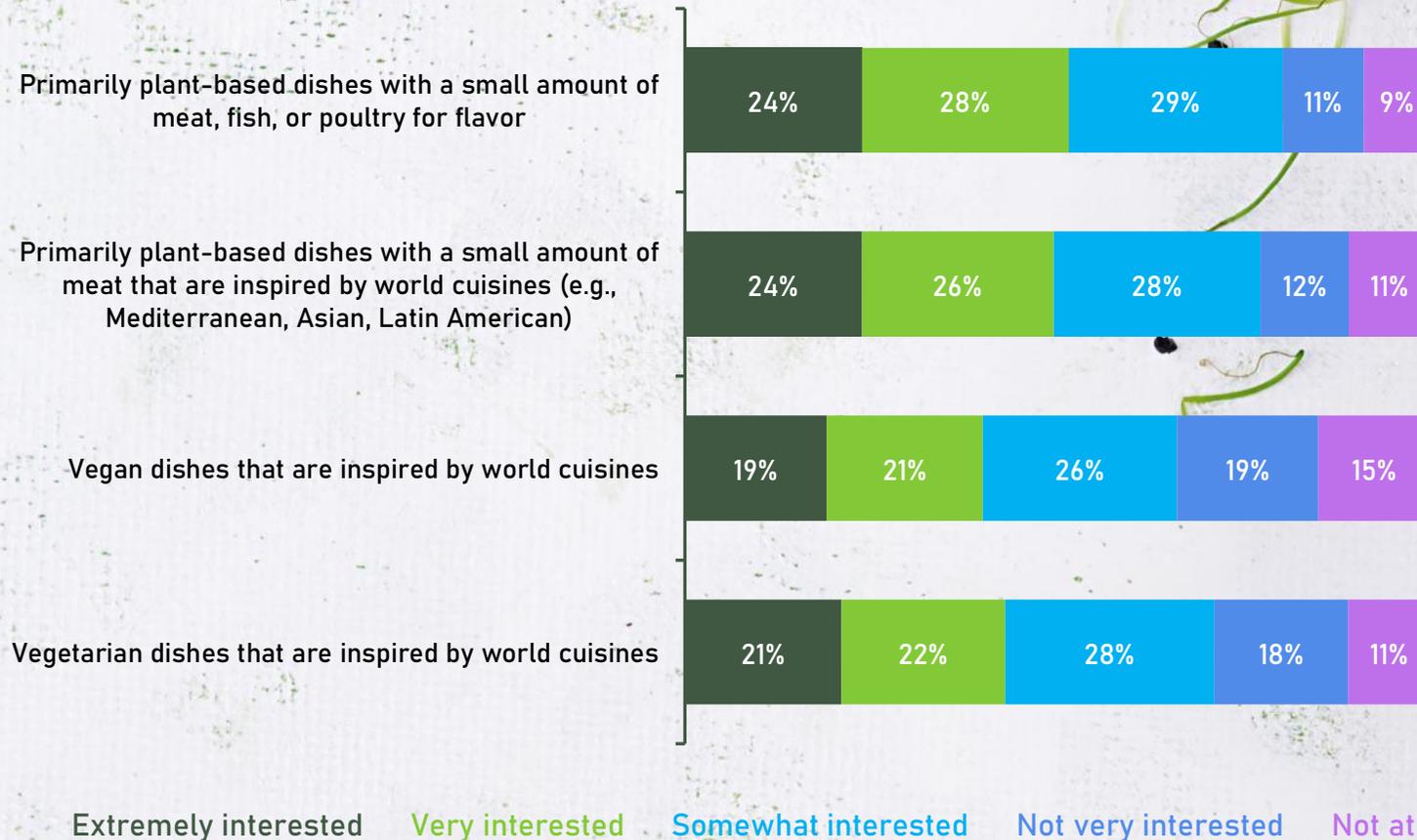
OF CONSUMERS AGREE WE WOULD HAVE LESS OF A NEGATIVE IMPACT ON THE ENVIRONMENT



A little meat goes a long way.

Half of consumers are very interested in plant-forward options that reduce the amount of meat, but vegetarian or vegan dishes don't hold the same appeal, even when incorporating global flavors or preparations.

And yet, 43% of consumers are very interested in vegetarian dishes inspired by world cuisines—with another 28% indicating they are at least somewhat interested in such dishes—suggesting a promising strategy for culinary innovation and menu experimentation.



More people see plant-forward eating as “yes, and” instead of either/or.

Only **about one in five consumers** prefers a plant-based analogue that mimics the taste of real meat; twice as many people see the value in offering both meat substitutes and dishes where meat is de-emphasized.

	TOTAL	MEN	WOMEN
I am open to eating both plant-forward choices and plant-based substitutes	39%	33%	44%
I am more interested in plant-forward choices with whole, less processed foods, mostly coming from plants	23%	27%	19%
I would prefer to be able to order plant-based meats and other plant-based substitutes that taste just like my favorite burgers, sausages and other animal proteins	20%	24%	16%
I am not open to trying plant-based substitutes made to mimic animal protein	18%	15%	21%

which would be your preference when ordering plant-based foods at a restaurant?



A flexitarian menu development approach might entice more plant-forward eating.

what could a chef or restaurant do to help you order more plant-forward foods?

46%

Add new menu items, including dishes with some meat or other animal protein that is not the “center of the plate”

35%

Add new menu items, including vegetarian or vegan dishes

Millennials (41%) are MORE LIKELY to agree



34%

Do a better job of cooking vegetable and other plant-forward dishes on the menu

Boomers (32%) are MORE LIKELY to agree



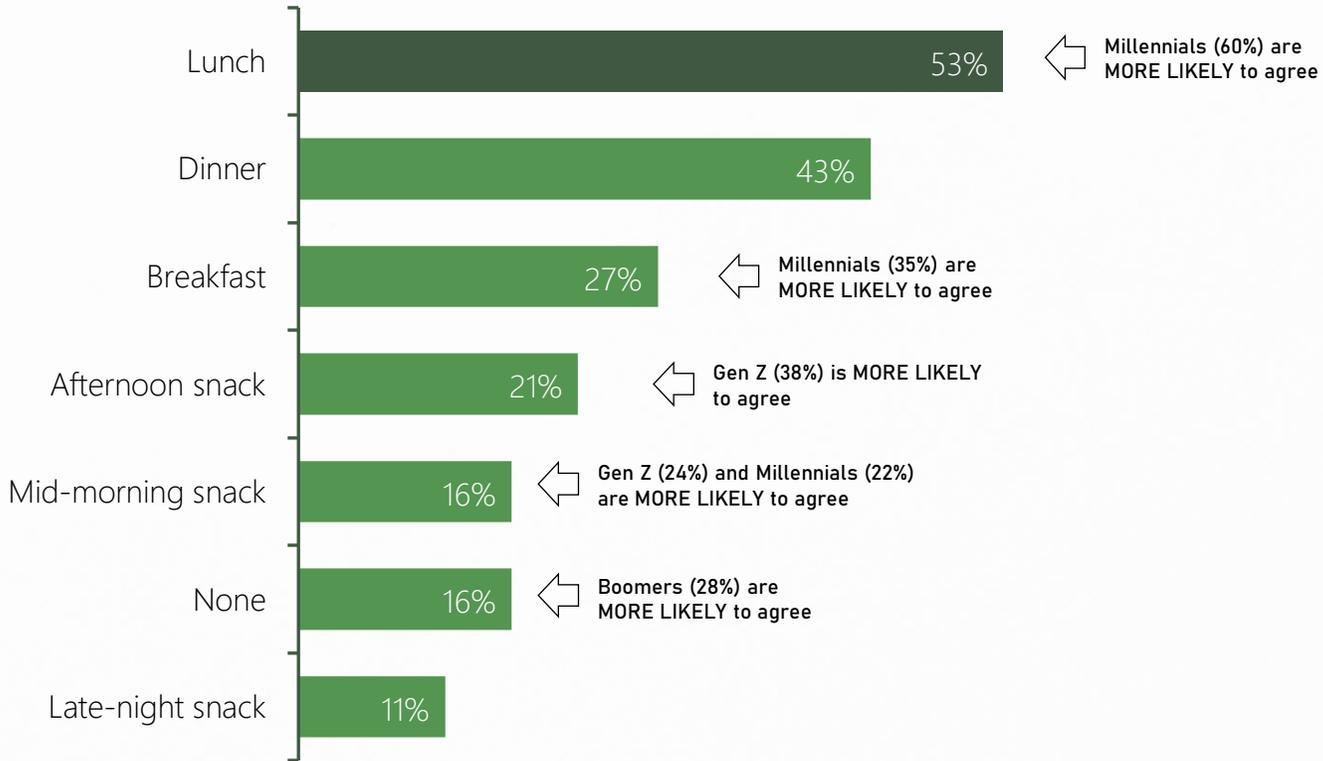
Nothing; I'm not interested in ordering plant-forward foods

6%

Meatless options play better at lunch.

More than half of consumers would be inclined to try vegetarian or vegan dishes for a lighter lunch, and younger consumers are significantly more open to plant-based snacks between more traditional dayparts.

during which times of day would you be more inclined to order a vegetarian or vegan meal in a restaurant, assuming it was prepared well and was delicious?



When would you be most inclined to order a vegetarian or vegan meal in a restaurant?



Few consumers expect plant-based meals to be less expensive.

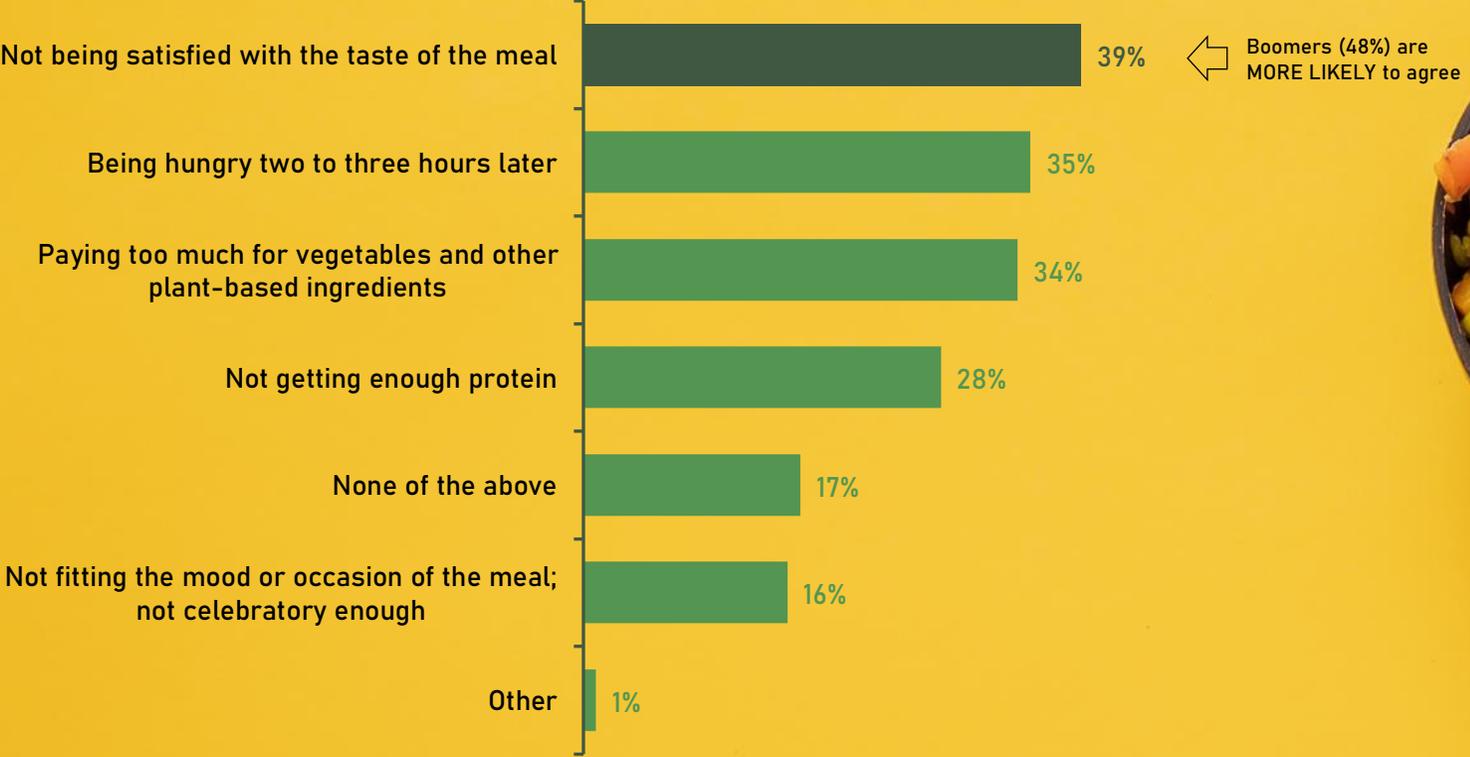


do you agree with...

	TOTAL	MEN	WOMEN	
I am willing to pay similar amounts for delicious, plant-forward meals as for meat-centric meals	38%	45%	32%	← Boomers (24%) are LESS LIKELY to agree
It depends on the menu item	26%	22%	30%	
I don't think I should be charged similar amounts for plant-forward meals as for meat-centric meals; plant-forward meals should be less expensive	19%	19%	19%	
N/A: I would not order plant-forward meals	17%	14%	19%	← Boomers (29%) are MORE LIKELY to agree

Customers need reassurance that they'll be satisfied and satiated.

Concerns over cost and protein content are salient for some, but about two in five consumers overall, and nearly half of Boomers, are concerned primarily with taste.



which of the following, if any, are concerns you have when eating less meat and more plant-forward or plant-based foods?

Vegetables are viable replacements for meat, cheese, or potatoes in appetizers.

Approachable formats for apps and sides often utilize breading and frying, which can be a promising direction if operators use healthful oils and batters (legume flours, whole grains, etc.).

PLANT-FORWARD APPETIZERS & SIDES

ranked by purchase intent



DATE	CHAIN	ITEM	DESCRIPTION	PURCHASE INTENT	UNIQUE
May 2020	Ninety Nine Restaurant & Pub	Crispy Cauliflower	Tempura-style cauliflower lightly fried and served with spicy sriracha-ranch dipping sauce.	55	75
Jan 2019	Beef 'O' Brady's	Buffalo Cauliflower		52	97
Mar 2019	California Pizza Kitchen	Sticky Asian Cauliflower	Our combination of sweet and spicy is irresistible on these crispy cauliflower florets with toasted peanuts and scallions.	21	95
May 2020	Burgerville	Asparagus Fries	Yakima Valley asparagus spears hand-battered and golden-fried to order.	14	96

Meatless handhelds get attention, but motivating purchase intent is another story.

Even when avocado toast is no longer unique, La Madeleine's no-frills format breaks through, while a tomato and ricotta version stands out for Le Pain Quotidien.

PLANT-FORWARD BURGERS & SANDWICHES

ranked by purchase intent

DATE	CHAIN	ITEM	DESCRIPTION	PURCHASE INTENT	UNIQUE
Jun 2020	La Madeleine	Avocado Toast	Fresh smashed avocado on toasted country bread with olive oil drizzle and lemon.	43	50
Jan 2020	Le Pain Quotidien	Roasted Tomato & Ricotta Toast	On organic five-grain bread drizzled with Mahjoub harissa-honey.	36	90
Jun 2020	Jason's Deli	Caprese Panini	If summer were a sandwich, we think it might be layered with fresh mozzarella, organic spinach, Roma tomatoes, and fresh basil-pesto aioli, then grilled inside scrumptious focaccia. Comes served with a side of chips.	35	68
Jul 2020	Fleming's Prime Steakhouse	Crispy Chickpea & Eggplant Burger	Housemade chickpea and roasted eggplant veggie patty, arugula, Campari tomatoes, and romesco sauce.	18	100
Jun 2020	Zoes Kitchen	FLT	Falafel patty, classic hummus, sliced tomatoes, spring mix, and lemon vinaigrette, served on multi-grain bread.	12	80
Jan 2020	Pret A Manger	Harissa Carrot & Hummus Sandwich	Hummus, harissa-grilled carrots, red peppers, pickled cabbage and carrots, and arugula topped with chili salt and served on our multi-grain bread.	6	98



Versatile bowls are suitable for greens, grains, and moderate amounts of meat.

Countless combinations for proteins, sauces, and veggies often produce dishes where meat is a supporting player rather than the star.

PLANT-FORWARD BOWLS & SALADS

ranked by purchase intent

DATE	CHAIN	ITEM	DESCRIPTION	PURCHASE INTENT	UNIQUE
Jan 2020	Newk's Eatery	Taco Salad	Romaine, Newcomb family beef chili, fresh Avocado, pico de gallo, jalapeños, tortilla strips, cheddar cheese, and sour cream.	77	26
Jan 2020	BJ's Restaurant & Brewhouse	Cauliflower & Quinoa Power Bowl w/ Chicken	Roasted barbacoa cauliflower, Peruvian quinoa and brown rice, black beans, corn and fire-roasted red pepper succotash, cucumbers, pickled red onions, pico de gallo, feta cheese, housemade guacamole, Greek yogurt crema, cilantro, and blackened chicken.	49	89
Jan 2020	Le Pain Quotidien	Three Bean Chili	Red, pinto, and black beans, sweet corn, bell peppers, green chilis, and slow-simmered tomatoes.	49	14
Jan 2020	Rubio's	Mango Superfood Bowl	Choice of all-natural chicken, grilled seafood, or grilled veggies, served with mango salsa, fresh guacamole, crunchy almonds, romaine, and lemon-agave vinaigrette, served with choice of all grains, or half grains and half greens.	44	94
Jan 2020	Corner Bakery	Power Greens & Grains Salad	Back by popular demand! Power greens blend of baby kale, arugula and spinach, ancient grains, chickpeas, cucumber, oven-roasted tomato, hard-boiled egg, and honey-balsamic vinaigrette.	31	63
Jan 2020	Uno Pizzeria & Grill	Mediterranean Grain Bowl	A bed of fresh arugula topped with grilled chicken breast, quinoa, feta, kalamata olives, cucumbers, tomatoes, parsley, and red onions, drizzled with lemon-basil dressing.	24	51



PLANT-FORWARD OPPORTUNITY

01

FEW PEOPLE TOTALLY ABSTAIN FROM EATING MEAT.

Just because plant-based burgers are growing on menus like crazy, that doesn't mean there are suddenly many more vegetarians and vegans. Those remain niche, though growing, eating styles.

02

PLANT-FORWARD EATING'S POTENTIAL HINGES ON CRAVEABILITY.

More people aspire to flexitarian diets than to ultra-restrictive diets like vegan or vegetarian, so the menu development area with more white space is a newly reimagined middle ground, in which small or moderate amounts of meat or other animal-based foods make plant-forward meals more approachable to the masses. The trick is using more produce, whole grains, nuts, etc. to make a dish that still packs a lot of flavor and fills the customer up. People's biggest concern with moving toward more plant-forward eating — more than cost — is being dissatisfied with the taste of a plant-centric meal.

Also, more people want restaurants to roll out dishes that, in the aggregate, mix smaller quantities of meat, poultry, seafood and dairy with produce and other plant-sourced foods (e.g. bowls, stir fries, or blended meat-mushroom burgers) than want those eateries to introduce plant-based substitutes or analogues for traditional proteins.

03

COST IS NOT A MAJOR ROADBLOCK FOR CONSUMERS.

A plurality of people are willing to pay similar prices for plant-based meals as they might expect to for meals where meat stars on the center of the plate.

04

CORRECTING PERCEPTIONS AROUND PROTEIN IS A KEY MARKETING CHALLENGE.

Despite broad consensus in the scientific community, many consumers still think — incorrectly — that plant protein is not a match for animal-based protein quality. Mixing plant-based protein with reduced quantities of animal-based protein may shorten the learning curve for many. Customers likely will find plant-forward menu items to be delicious, filling, and satisfying, but they'll have their doubts until they actually try them.

05

THE PANDEMIC HAS NOT TURNED US INTO HEALTH NUTS, BUT...

Demand for plant-based and plant-forward restaurant dishes will continue to grow steadily, though the Coronavirus crisis has not really accelerated this trend. Today, more than four in five Americans are open to eating less meat, and menu makers should keep up the innovation around both plant-based and especially plant-forward.