



Plant-Forward Eating: Translating Trends Into Menu Solutions



June 28, 2022



Allie Busch
Healthcare Brand Manager
General Mills

Speakers



Marie Molde, RD, MBA
Trends Analyst and Health & Wellness Expert, Datassential



Chef Kevin Relf
General Mills Global Culinary,
Corporate Chef

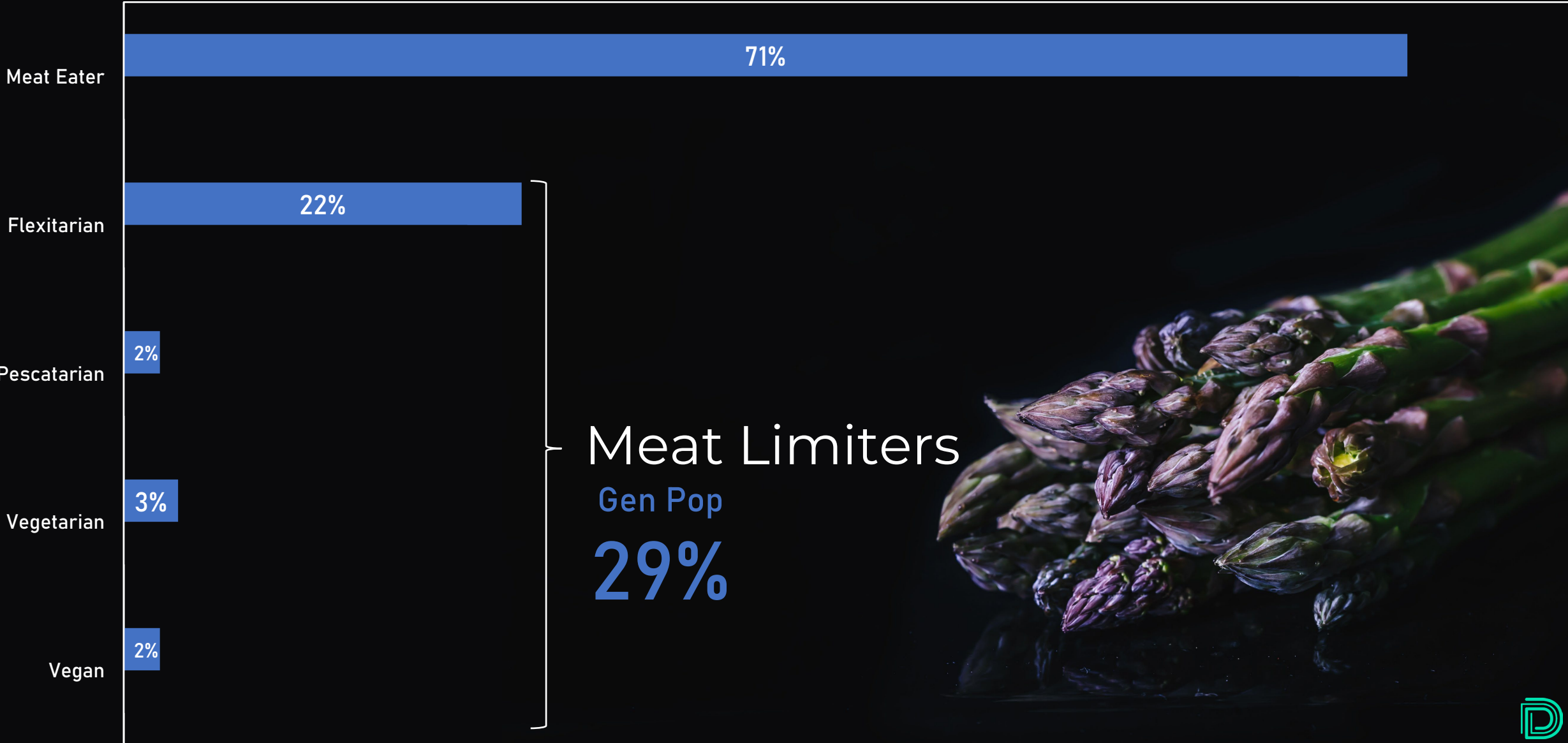


Chef Ted Osorio
General Mills Global Culinary,
Corporate Chef

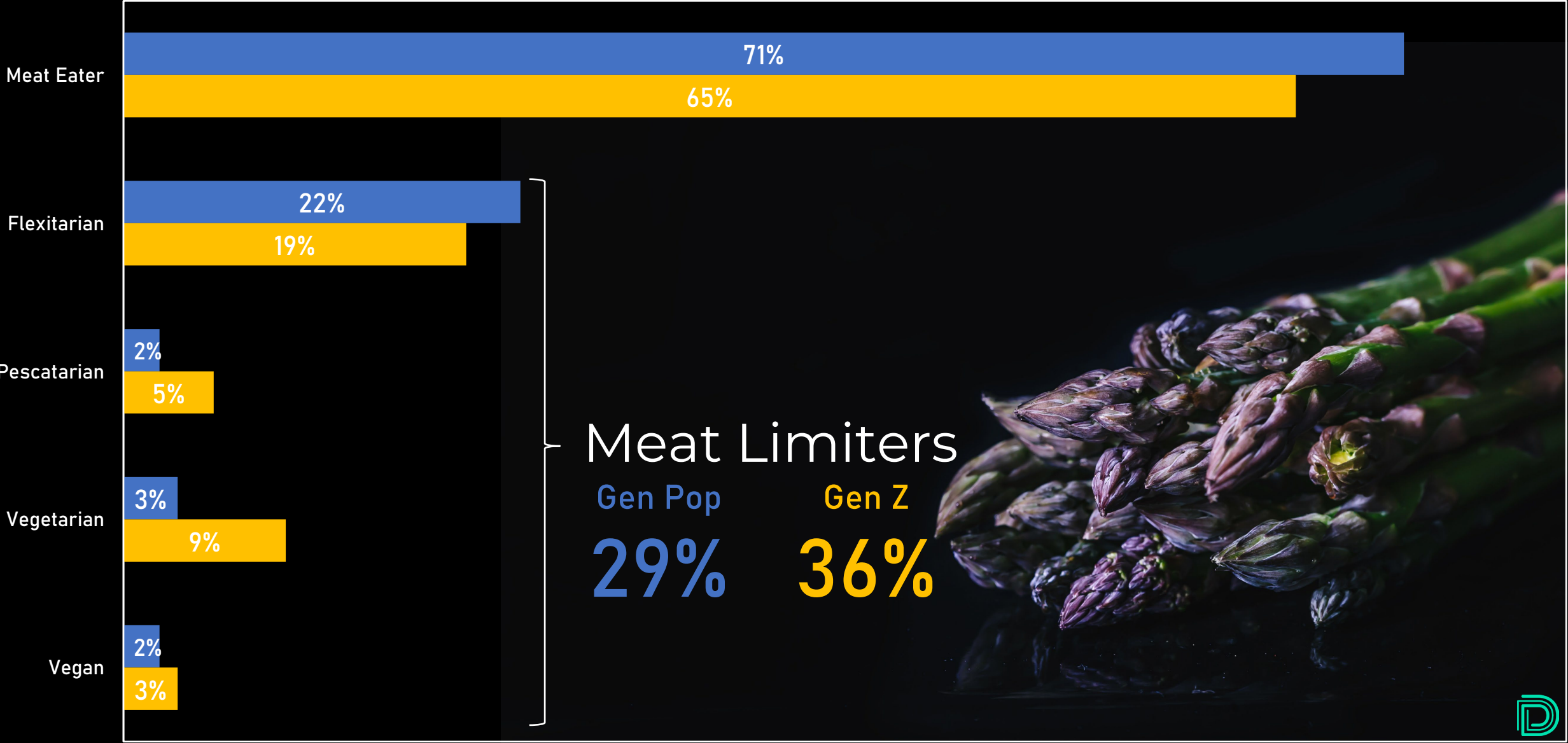
PLANT- FORWARD EVOLUTION



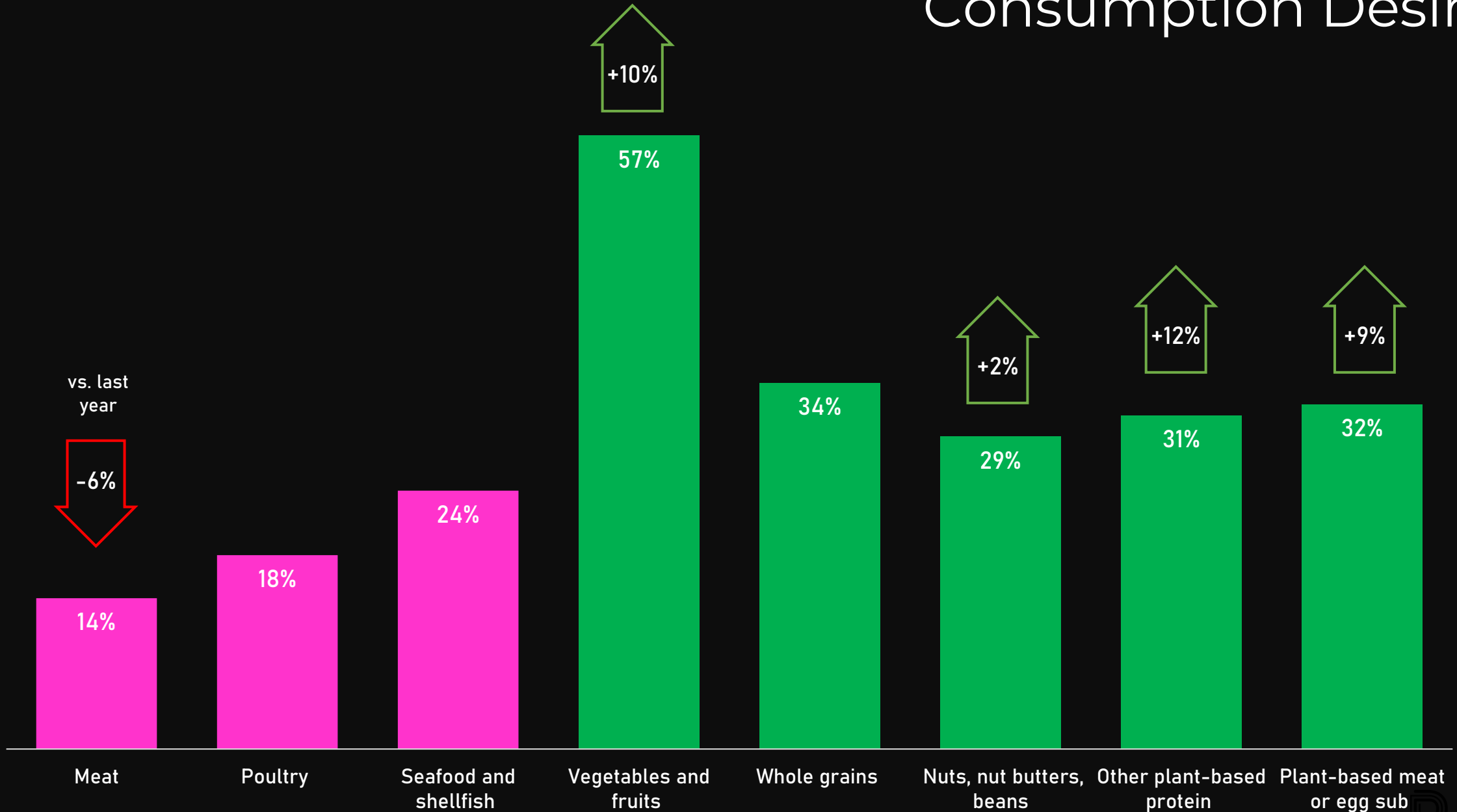
Eating Approach



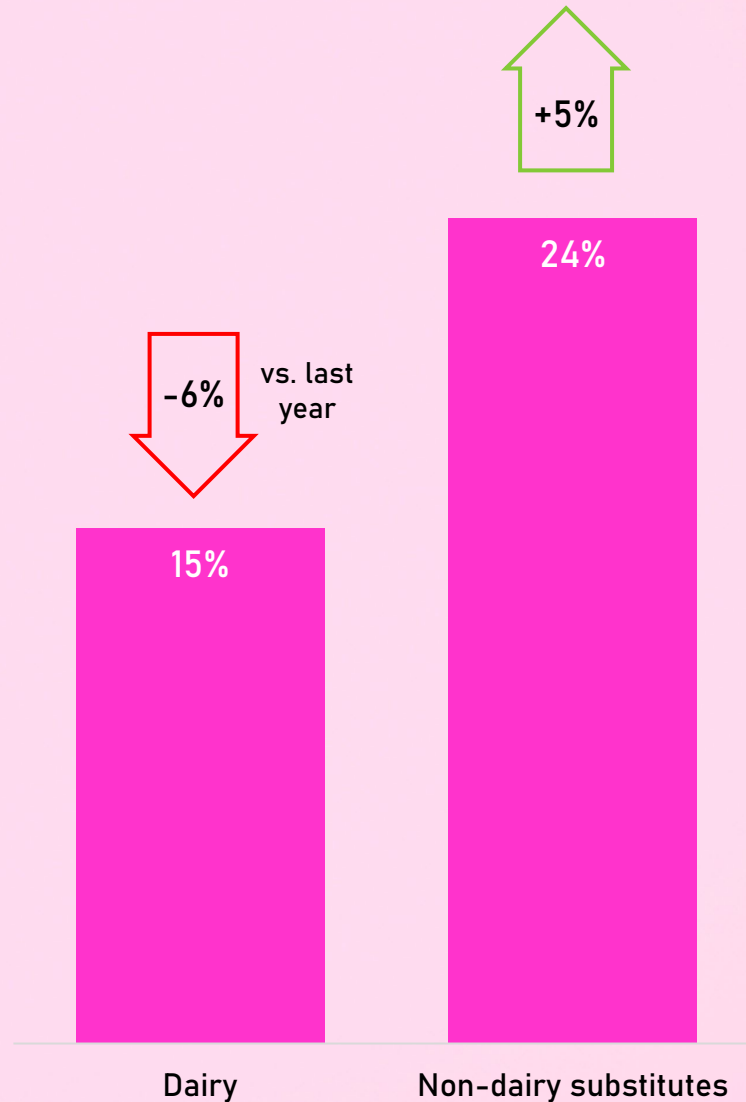
Eating Approach



Consumption Desires

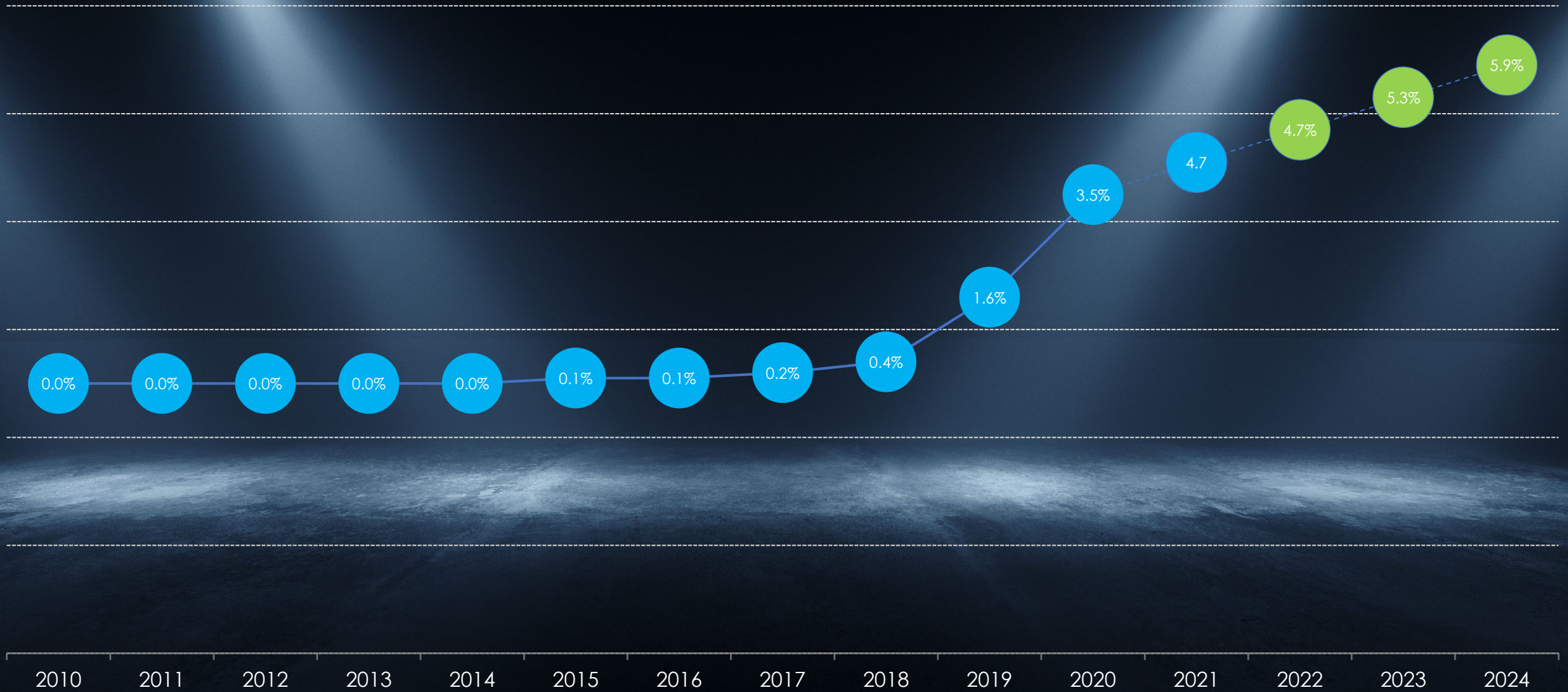


Consumption Desires



	PENETRATION	4-YEAR GROWTH
Almond Milk	3.3%	+57%
Coconut Milk	2.2%	+104%
Soy Milk	2.1%	-14%
Oat Milk	1.4%	+++%
Rice Milk	0.3%	-

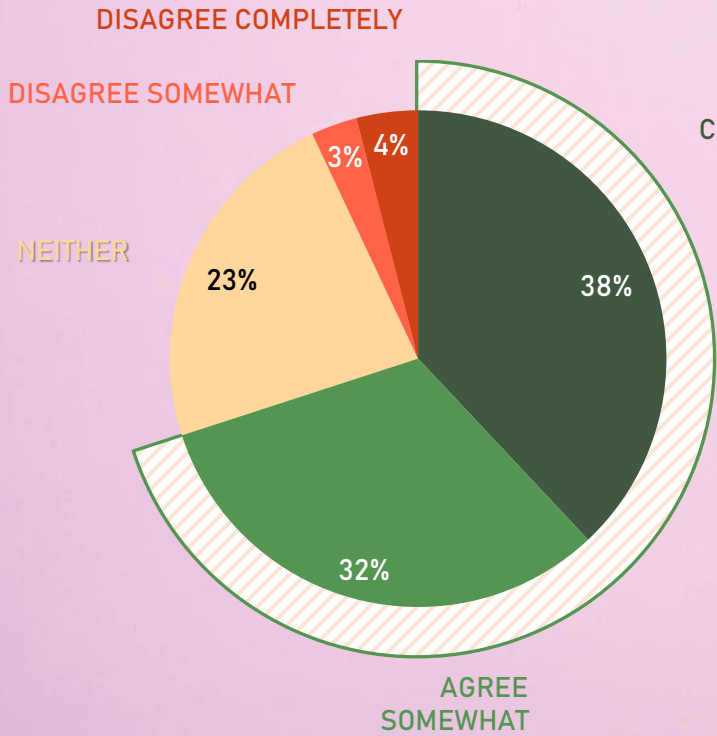
PLANT BASED



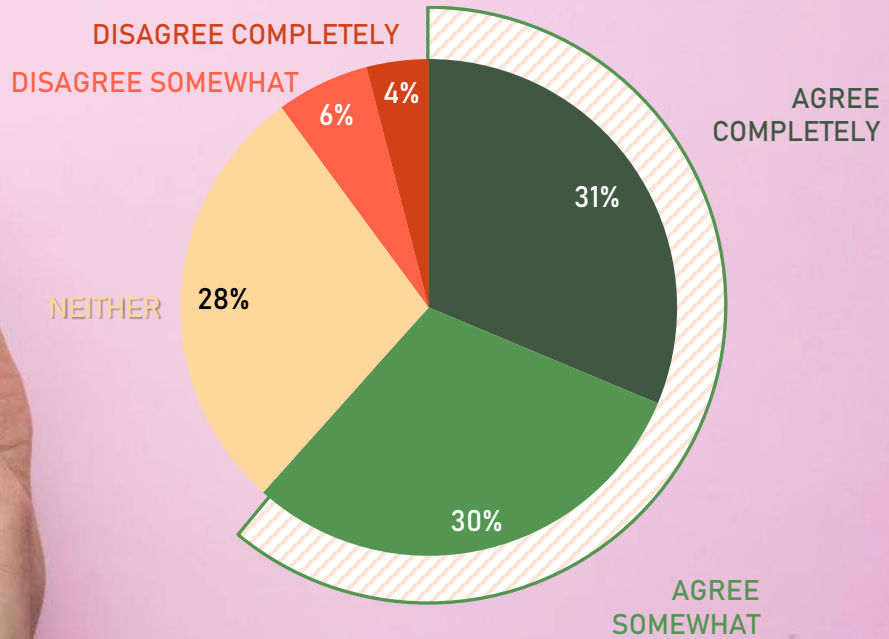
Plant-based eating seems better to consumers.

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

70%
AGREE IT'S
HEALTHIER



62%
AGREE IT'S
BETTER FOR THE ENVIRONMENT





Climate on the menu

Fast casual chains are experimenting with climate menus.


thrillist

NEWS


Panera's 'Cool Food Meals' Come With a Lower Carbon Footprint

More than half of its menu boasts an eco-friendly badge.

By Thrillist News Published on 10/14/2020 at 5:48 PM



PANERA



THE SPOON

Just Salad's Latest Menu Innovation: Adding Your Carbon Footprint to Your Meal



Right now, 26% of greenhouse gas emissions are created by the food system.
YOUR FOOD CHOICES CAN CHANGE THAT.

From reusable bowls to a climate-conscious menu, we're making everyday **ENVIRONMENTAL CHOICES** a little easier. Not to mention you'll get the best fresh, healthy meal in town.

For the planet, every meal counts.
EAT WITH PURPOSE.

K-UP



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EAT WITH PURPOSE.



FOOD CHOICES = CLIMATE CHOICES

And you just made a good one

proud partner of



FOOD FOR
CLIMATE
LEAGUE



“We could mitigate climate change by eating differently.”



65%

OF CONSUMERS AGREE

You eat what you are.

Consumers are loyal to plant based.

Those that eat plant-based items NOW overwhelmingly plan to continue.

87%

YES

13%

NO



Do you think you think you will continue to have more plant-based items for the foreseeable future?



71%

of Americans have tried
at least one type of
plant-based meat
alternative

how often do you eat each of the
following types of meat alternatives?



Jan 2021

\$10.99

Rubio's

IMPOSSIBLE™ TACO SALAD



Impossible™ ground and seasoned meat made from plants, romaine lettuce, black beans, roasted corn, salsa Fresca, tortilla strips, sliced Haas avocado, and signature pickled jalapeno ranch dressing.

Unbranded PI: 49% ★★★★★
 Branded PI: 65% ★★★★★
 Uniqueness: 50% ★★★★★
 Frequency: 29% ★★★★★
 Draw: 55% ★★★★★
 Value: 37% ★★★★★

SCORE
99
superstar

Jan 2021

\$10.59

Carl's Jr

BEYOND FIERY FAMOUS STAR



Beyond Fiery Famous Star made with a charbroiled 100 percent plant-based Beyond Burger patty, new Fiery Sauce, pepper Jack cheese, jalapenos, sliced onions, tomato, and lettuce on a toasted seeded bun.

Unbranded PI: 46% ★★
 Branded PI: 48% ★★★
 Uniqueness: 50% ★★★★★
 Frequency: 30% ★★★★★
 Draw: 56% ★★★★★
 Value: 30% ★★

SCORE
64
specialty appeal

Jan 2020

\$10.99

Ruby Tuesday

SWEET EARTH AWESOME BURGER



The Sweet Earth Awesome Burger is a juicy, delicious plant-based burger that smells, looks, tastes and cooks like a beef hamburger - achieving craveable tastiness. The burger was designed to meet the needs of flexitarians and meat eaters alike who want to reduce the intake of meat in their diet due to health, or animal welfare reasons.

Unbranded PI: 45% ★★
 Branded PI: 41% ★★★
 Uniqueness: 45% ★★★
 Frequency: 24% ★★★★★
 Draw: 46% ★★★
 Value: 31% ★★★

SCORE
41
consider

Jul 2020

\$6.99

KFC

BEYOND FRIED CHICKEN



BEYOND
Fried Chicken

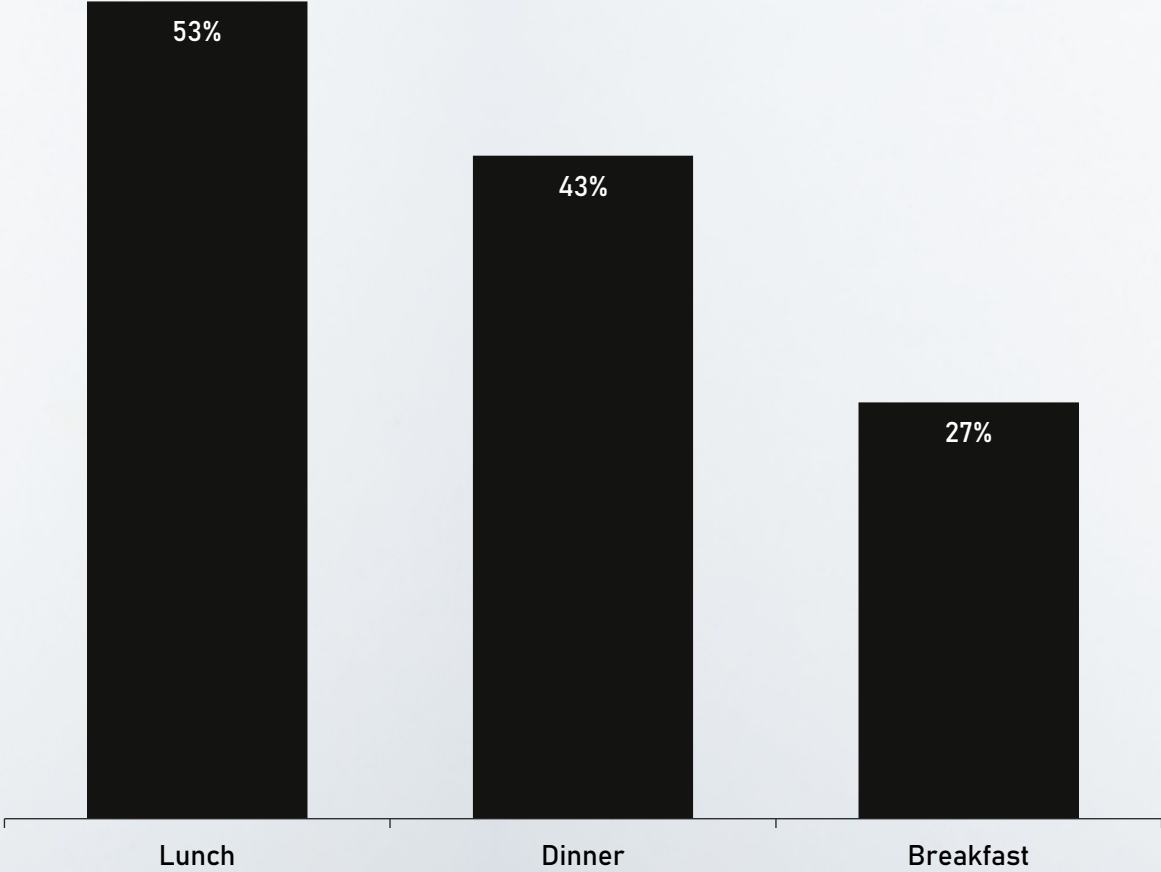
Our plant-based fried chicken boasts the same flavors of our signature fried chicken with the texture that looks and pulls apart like a real chicken breast. Served with your choice of dipping sauce, a side and medium drink.

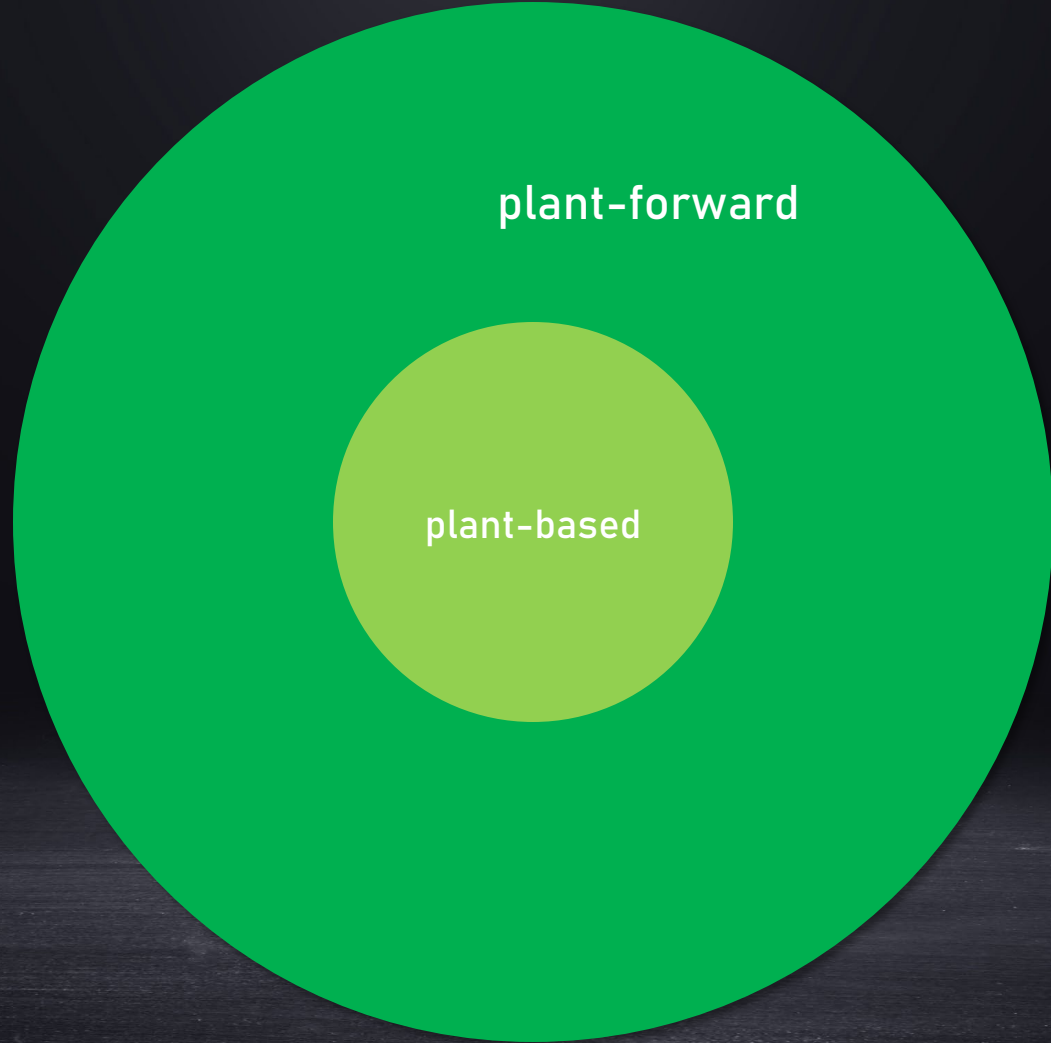
Unbranded PI: 41% ★★★
 Branded PI: 41% ★★
 Uniqueness: 52% ★★★★★
 Frequency: 22% ★★★★★
 Draw: 51% ★★★★★
 Value: 36% ★★★

SCORE
56
specialty appeal



INTEREST IN MEATLESS MEALS AT RESTAURANTS





concerns with plant-forward eating

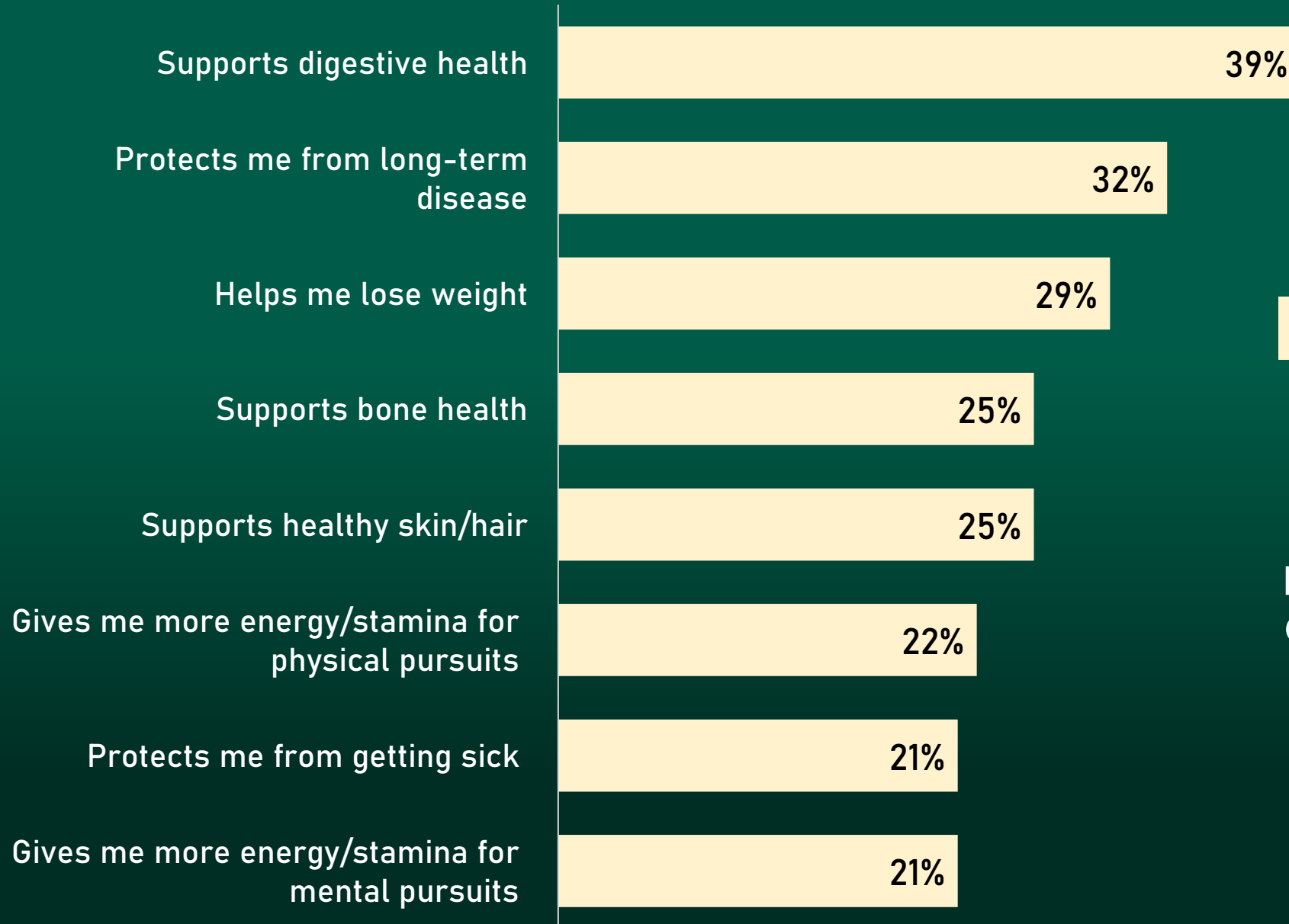
Might not taste good	39%
Being hungry two to three hours later	35%
Paying too much for plant-based ingredients	34%
Not getting enough protein	28%
Not fitting the mood or occasion of the meal	16%



concerns with plant-forward eating

Might not taste good	39%	—	flavor first
Being hungry two to three hours later	35%	—	satisfying dishes
Paying too much for plant-based ingredients	34%	—	that spotlight what's there, instead of what's not
Not getting enough protein	28%		
Not fitting the mood or occasion of the meal	16%		





HEALTH/ IMMUNITY BENEFITS

**CONSUMERS LOOK
FOR IN PLANT-BASED
OR -FORWARD FOOD**



PLANT-BASED CATEGORY TRENDS



TOP PLANT BASED DISHES

	MENU PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Salad	33.4%	-3%	+10%
Soup	20.9%	-2%	-8%
Burger	20.2%	+4%	+45%
Sandwich	20.1%	-	-4%
Pizza	14.1%	+2%	-
Bowl	11.9%	+10%	+55%
Curry	9.3%	-7%	-2%
Pasta	8.5%	-4%	+17%
Wrap	8.1%	+3%	+8%
Burrito	7.8%	-	+6%
Taco	6.4%	+4%	+38%
Fried Rice	6.4%	+6%	+7%
Ma Po Tofu	5.0%	+15%	+7%
Mac and Cheese	4.2%	-6%	+73%
Quesadilla	4.0%	-3%	+8%
Pad Thai	4.0%	-4%	-
Spring Roll	3.9%	-10%	-18%
Omelette	3.8%	-4%	-7%
Dumpling	3.3%	+2%	+10%
Falafel	3.1%	+20%	+35%



TRENDING **PLANT BASED** **DISHES**

	MENU PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Buffalo Cauliflower	0.6%	+14%	+1328%
Avocado Toast	1.7%	+22%	+993%
Cauliflower Wing	0.4%	-	+971%
Spaghetti and Meatballs	0.2%	+133%	+525%
Churro	0.5%	-	+480%
Plant Based Burger	10.0%	+14%	+445%
Nashville Hot	0.2%	+100%	+435%
Biscuit & Gravy	0.4%	+120%	+391%
Cacio e Pepe	0.3%	+150%	+346%
Breakfast Sandwich	0.5%	-	+316%
Poke	0.9%	-4%	+287%
Donut	0.7%	+50%	+275%
Fried Brussels Sprouts	0.4%	-	+257%
Kale Slaw	0.3%	+33%	+257%
Taco Bar	0.5%	-	+212%
Latte	0.3%	-	+197%
Street Taco	0.3%	+43%	+197%
Vegan Burger	1.6%	+18%	+174%
Poutine	0.2%	+50%	+168%
Veggie Sub	0.3%	+60%	+138%

+++ indicates growth over 200%

MenuTrends 2021, **PENETRATION**: Of restaurants serving plant based dishes, % that offer...

MOST MENUED MEAT ALTERNATIVES

	MENU PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Mushroom	75.5%	-4%	-5%
Bean	64.0%	-4%	-5%
Pea	27.5%	-7%	-9%
Eggplant	27.1%	-10%	-15%
Black Bean	26.9%	-6%	-2%
Almond	24.4%	-12%	-11%
Walnut	23.0%	-13%	-15%
Cauliflower	21.1%	-5%	+22%
Tofu	19.2%	-1%	+4%
Pecan	16.7%	-10%	-9%
Chickpea	15.3%	-6%	+1%
Beet	15.0%	-15%	-15%
Cashew	14.4%	-3%	-1%
Portobello Mushroom	12.1%	-12%	-22%
Quinoa	12.1%	-11%	+16%



TRENDING MEAT ALTERNATIVES

	MENU PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Plant Based Burger	6.0%	+24%	+939%
Jackfruit	0.7%	+33%	+431%
Nut Butter	0.1%	-36%	+249%
Fried Cauliflower	1.7%	+9%	+107%
Soy Chorizo	0.5%	-	+66%
Plant Based Chicken	1.0%	-2%	+63%
Pea Protein	0.2%	+37%	+57%
Chia	1.8%	-12%	+56%
Mushroom Bacon	0.3%	-	+55%
Cauliflower Steak	0.4%	-10%	+49%
Vegetarian Sausage	0.7%	-10%	+43%
Falafel Burger	0.4%	-6%	+41%
Beet Burger	0.1%	+67%	+25%
Yellow Lentil	1.0%	+19%	+25%
Cauliflower	21.1%	-5%	+22%



+++ indicates growth over 200%

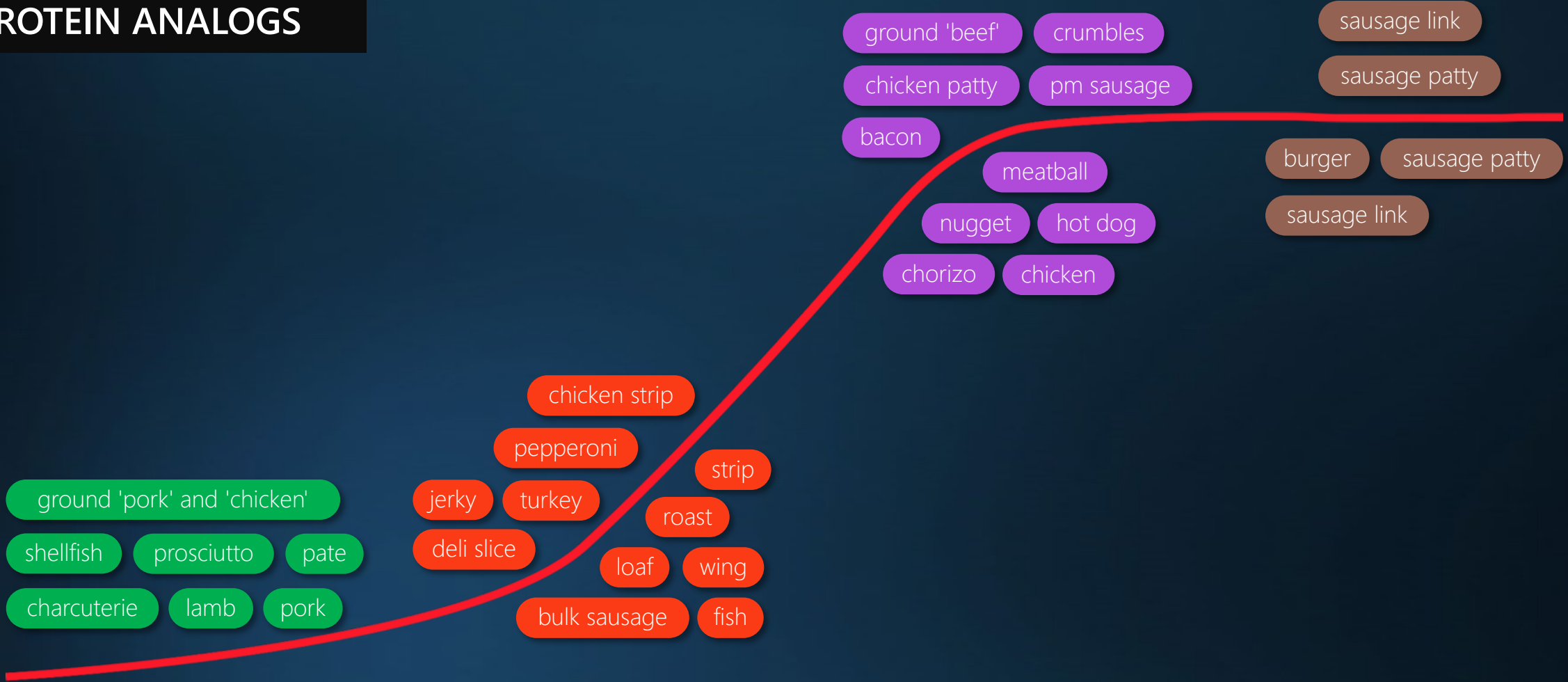
MenuTrends 2021, PENETRATION: Of restaurants serving apps, entrees, or sides, % that offer...



PLANT BASED MEAT



PLANT BASED PROTEIN ANALOGS



inception
fine dining, mixology, earliest stage

adoption
trendy restaurants + specialty grocers

proliferation
chain restaurants + mainstream grocery

ubiquity
find it just about anywhere



TOP PLANT BASED MEAT ANALOG FORMATS

	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Burger	58.6%	-1%	+18%
Patty	25.9%	-3%	+38%
Roast	11.7%	+18%	+36%
Meatball	5.3%	-16%	-15%
Vegetarian Sausage	4.4%	-24%	-2%
Veggie Bacon	3.0%	-6%	-2%
Soy Chorizo	3.0%	+16%	+148%
Crumble	1.8%	+17%	+195%
Plant Based Chicken	1.1%	+6%	+430%

+++ indicates growth over 200%

MenuTrends 2021, PENETRATION: of restaurants serving a meat analog (excluding tofu, tempeh, or seitan), % that offer...

**Over half – 52% – of Gen Z
thinks plant-based meats can
taste better than traditional
meats, compared to 37% of
consumers overall.**

Q: Do you agree or disagree: I think it's possible that plant-based meats (like the Impossible Burger or Beyond Meat) can taste better than traditional animal counterparts? | Fielded **November 2021** (n = **1000**)



NON DAIRY



PLANT BASED DAIRY

- pea milk
- quinoa milk
- potato milk
- spelt milk
- lab-created vegan dairy
- banana milk
- barley milk
- cream cheese
- hemp milk
- sesame milk
- hazelnut milk
- millet milk
- nutritional yeast
- walnut milk
- pistachio milk
- peanut milk
- sprouted milk
- flax milk
- macadamia milk

- rice milk
- yogurt
- butter
- cashew milk
- cheese

- ice cream
- almond milk
- coconut milk
- oat milk
- margarine
- soy milk

inception
fine dining, mixology, earliest stage

adoption
trendy restaurants + specialty grocers

proliferation
chain restaurants + mainstream grocery

ubiquity
find it just about anywhere





Today 41% of Gen Z says they drink alternative milk daily or weekly, while about the same percentage (42%) say they rarely or never drink traditional dairy milk.

Q: Which of the following best describes your personal experience with drinking alternative “milks” like oat milk, almond milk, soy milk, etc.? | Fielded **November 2021** (n = 1000)

Q: Which of the following best describes your personal experience with drinking traditional dairy (cow’s) milk? | Fielded **November 2021** (n = 1000)



TOP NON DAIRY MILKS

	PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH
Almond Milk	3.3%	+1%	+57%
Coconut Milk	2.2%	+3%	+104%
Soy Milk	2.1%	-16%	-14%
Oat Milk	1.4%	+150%	+2236%
Rice Milk	0.3%	-18%	-
Hemp Milk	0.1%	+50%	+100%
Cashew Milk	0.1%	-33%	-

+++ indicates growth over 200%

MenuTrends 2021, PENETRATION: % of restaurants serving non alcoholic beverages % that offer...

NON DAIRY MILK



	KNOW IT	TRIED IT	HAD MANY TIMES	LOVE IT	HATE IT
Almond Milk	92%	60%	20%	18%	8%
Coconut Milk	88%	54%	8%	12%	8%
Plant Based Milk	70%	42%	15%	12%	9%
Soy Milk	86%	43%	7%	8%	12%
Oat Milk	67%	28%	6%	7%	5%
Cashew Milk	65%	22%	3%	5%	5%
Hazelnut Milk	60%	23%	3%	5%	4%
Rice Milk	63%	22%	3%	4%	5%
Walnut Milk	47%	15%	3%	4%	3%
Pistachio Milk	41%	10%	2%	3%	3%
Flax Milk	40%	10%	2%	2%	3%
Macadamia Milk	41%	12%	2%	2%	2%
Quinoa Milk	33%	9%	1%	2%	2%
Hemp Milk	29%	8%	1%	1%	2%
Pea Milk	22%	7%	1%	1%	2%

NON DAIRY CHEESE


	MENU PENETRATION	1-YEAR GROWTH	4-YEAR GROWTH	KNOW IT	TRIED IT	HAD MANY TIMES	LOVE IT
Nutritional Yeast	0.2%	-14%	+20%	49%	22%	3%	4%
Vegan Cheese	2.7%	+15%	+208%	47%	17%	3%	3%
Cashew Cheese	0.3%	-6%	+6%	28%	11%	2%	2%
Vegan Cream Cheese	0.1%	-	+149%	39%	13%	2%	2%
Soy Cheese	0.1%	-13%	-37%	39%	12%	1%	1%

NON DAIRY INTRODUCTIONS

Jan 2021 \$4.25

Starbucks

HONEY ALMONDMILK COLD BREW




Starbucks® Cold Brew lightly sweetened with honey and topped off with almond milk for a balanced taste in every delicious sip.

Unbranded PI: 41%	☆☆☆	SCORE 71 consider
Branded PI: 43%	☆☆☆	
Uniqueness: 49%	★★★★★	
Frequency: 27%	★★★★★	
Draw: 58%	★★★★★	
Value: 40%	☆☆☆	

Apr 2021 \$3.00

Dunkin'

GOLDEN PEACH COCONUT REFRESHER




Peach Passion Fruit flavors combined with coconut milk.

Unbranded PI: 44%	☆☆☆	SCORE 71 specialty appeal
Branded PI: 44%	☆☆☆	
Uniqueness: 51%	★★★★★	
Frequency: 25%	★★★★★	
Draw: 51%	★★★★★	
Value: 46%	☆☆☆	

Mar 2021 \$5.85

Peet's Coffee & Tea

GOLDEN SPICE COLD BREW OAT LATTE




Creamy plant-based oat milk blended with vibrant turmeric, cinnamon, a touch of honey over ice with a pour of smooth, refreshing Baridi cold brew.

Unbranded PI: 37%	☆☆☆	SCORE 49 specialty appeal
Branded PI: 48%	☆☆☆	
Uniqueness: 56%	★★★★★	
Frequency: 21%	☆☆☆	
Draw: 41%	☆☆	
Value: 32%	☆☆	

May 2021 \$16.49

Yard House

PRIME BEYOND BURGER



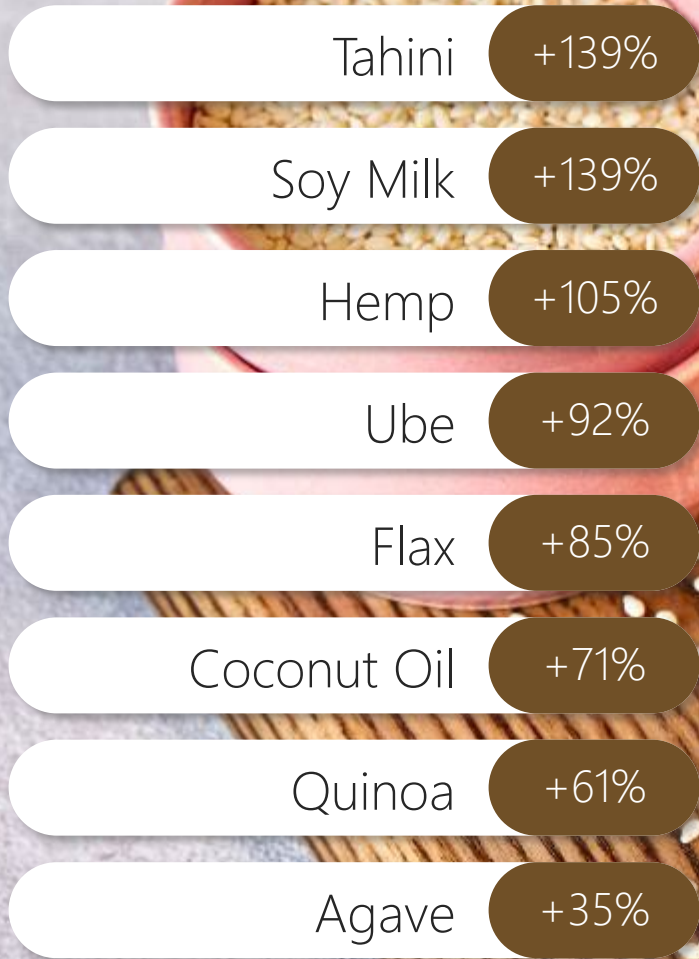
Vegan mozzarella, crushed avocado, arugula, red onion, tomato, pickles, served with a side salad tossed in balsamic vinaigrette. Served on our new brioche bun with sesame seeds.

Unbranded PI: 41%	☆☆☆	SCORE 34 consider
Branded PI: 58%	☆☆☆	
Uniqueness: 39%	☆☆☆	
Frequency: 23%	★★★★★	
Draw: 45%	☆☆☆	
Value: 26%	☆☆	

DESSERT



PLANT BASED DESSERT TRENDS




4-year penetration
% change

PLANT BASED DESSERT INTRODUCTIONS

Jul 2021 \$4.69

Burgerville Usa

OREGON BLUEBERRY SHAKE




Oregon blueberries blended with your choice of local ice cream or plant-based, non-dairy Coconut Bliss®. Then topped with dairy or coconut whipped cream and a blueberry drizzle.

Unbranded PI: 52%	☆☆☆	SCORE 74 specialty appeal
Branded PI: 70%	☆☆☆	
Uniqueness: 53%	★★★★★	
Frequency: 20%	☆☆☆	
Draw: 49%	☆☆☆	
Value: 44%	☆☆☆	

Jul 2021 \$4.99

Tcby

WATERMELON SORBET




Watermelon Sorbet features a sorbet base mixed with watermelon flavoring. This fan-favorite is non-dairy, vegan, gluten-free and fat-free.

Unbranded PI: 48%	☆☆☆	SCORE 45 consider
Branded PI: 48%	☆☆☆	
Uniqueness: 48%	☆☆☆	
Frequency: 21%	☆☆☆	
Draw: 45%	☆☆☆	
Value: 37%	☆☆☆	

Jun 2021 \$3.99

Burgerville Usa

CARAMEL & COOKIES ICE CREAM SANDWICH




Plant-based non-dairy Coconut Bliss® caramel ice cream and chocolate chip cookies made with gluten-free ingredients. All new Ruby Jewel® and Coconut Bliss®.

Unbranded PI: 50%	☆☆☆	SCORE 70 consider
Branded PI: 74%	★★★★★	
Uniqueness: 48%	☆☆☆	
Frequency: 23%	★★★★★	
Draw: 44%	☆☆☆	
Value: 43%	☆☆☆	

Sep 2020 \$2.95

Coffee Bean And Tea Leaf

VEGAN CHOCOLATE BROWNIE



A chewy brownie made without eggs or dairy.

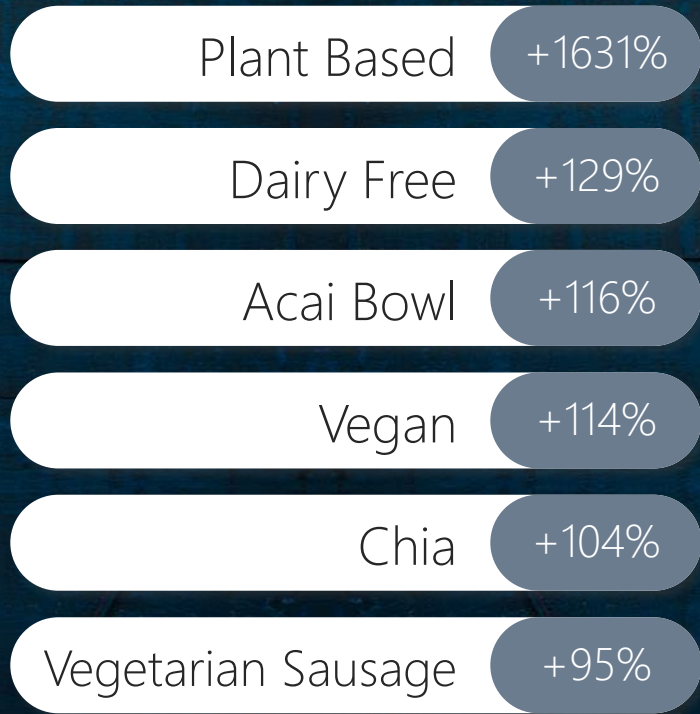
Unbranded PI: 38%	★★	SCORE 43 consider
Branded PI: 52%	★★	
Uniqueness: 48%	★★★★★	
Frequency: 22%	☆☆☆	
Draw: 40%	★★	
Value: 42%	☆☆☆	

BREAKFAST



HEALTHY HALO

Meatless and dairy free options are moving onto breakfast menus, from vegetarian sausage to plant based dishes like acai bowls.

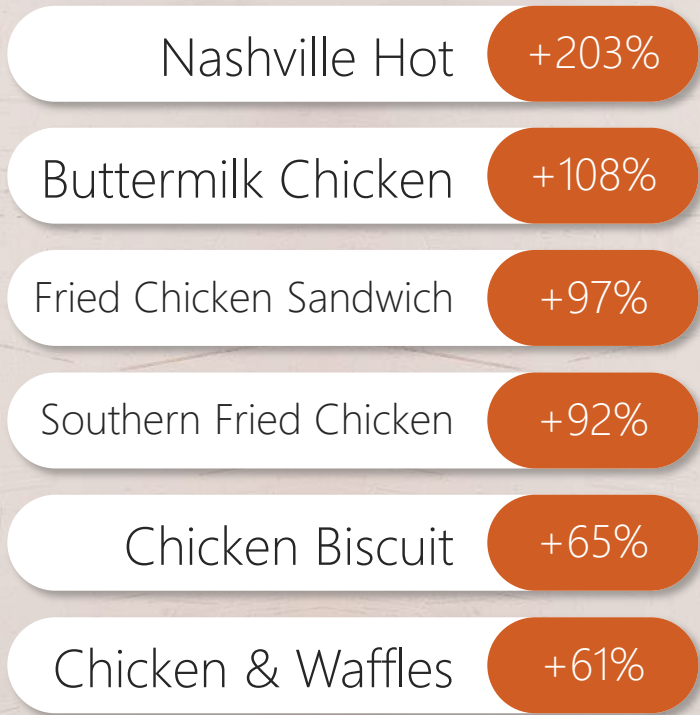


⋮
4-year penetration
% change



SOUTHERN INSPIRED

Chicken-based southern dishes have exploded on breakfast menus over the past few years.



4-year penetration % change



SPICY

Spicy flavors with a range of different spice levels are gaining traction on breakfast menus.

Chili Flakes +163%

Spicy Mayo +136%

Chipotle Aioli +107%

Spicy Honey +103%

Buffalo +93%

Hot Sauce +73%

4-year penetration
% change



PLANT BASED BREAKFAST INTRODUCTIONS

Jan 2021 \$10.99

First Watch
TRIPLE BERRY ACAI BOWL



Organic Sambazon Açai topped with fresh strawberries, blackberries, blueberries and our housemade granola. Served with whole grain artisan toast topped with almond butter and Maldon sea salt.

Unbranded PI: 47% ★★ ★
 Branded PI: 69% ★★★★★
 Uniqueness: 51% ★★★★★
 Frequency: 21% ★★ ★
 Draw: 49% ★★★★★
 Value: 29% ★★ ★

SCORE
73
 specialty appeal

Jul 2021 \$5.39

Panera Bread
PEACH & BLUEBERRY SMOOTHIE WITH ALMONDMILK



Peach and mango purees and white grape and passionfruit juice concentrates blended with fresh blueberries and almondmilk.

Unbranded PI: 51% ★★★★★
 Branded PI: 48% ★★ ★
 Uniqueness: 52% ★★★★★
 Frequency: 23% ★★ ★
 Draw: 50% ★★★★★
 Value: 37% ★★ ★

SCORE
72
 volume driver

Mar 2021 \$5.95

Peet's Coffee & Tea
EVERYTHING PLANT-BASED SANDWICH



The Everything Plant-Based Sandwich features a savory plant-based Beyond Breakfast Sausage patty, topped with plant-based JUST Egg and melted plant-based cheddar cheese, served on an everything bagel thin.

Unbranded PI: 39% ★★
 Branded PI: 54% ★★★★★
 Uniqueness: 56% ★★★★★
 Frequency: 23% ★★★★★
 Draw: 47% ★★ ★
 Value: 39% ★★ ★

SCORE
55
 specialty appeal

Sep 2020 \$10.99

Coco's Bakery
IMPOSSIBLE BREAKFAST BURRITO



Impossible Delicious Sausage Made from Plants for Meat Lovers, creamy scrambled eggs, crispy hashbrowns, pico de gallo, cheddar and our Spicy Santa Fe Sauce wrapped in a warm flour tortilla. Served with your choice of side.

Unbranded PI: 43% ★★ ★
 Branded PI: 69% ★★★★★
 Uniqueness: 48% ★★★★★
 Frequency: 28% ★★★★★
 Draw: 51% ★★★★★
 Value: 31% ★★ ★

SCORE
83
 consider

COUNTER TRENDS



When it comes to plant-based foods, it's time to get back to our roots

Whole Foods CEO says plant-based 'meat' is unhealthy

It may be good for the environment, he told CNBC, but maybe not for our bodies.

Plant-based meat alternatives, like new nuggets from KFC, sound healthier. But are they?

Those fake-meat hamburgers might not be a planet-saver after all

There's a growing backlash against the rise of fake meat – here's why



“

I don't need my peas to pretend
to be a cheeseburger.

”

”

”



A close-up photograph of fresh spinach leaves, glistening with water droplets, filling the left half of the image.

60%

of consumers say they prefer plant-based foods that showcase the fruit or vegetable instead of mimicking another food

A close-up photograph of several strips of cooked bacon, showing the characteristic marbled texture of fat and meat, filling the right half of the image.

40%

of consumers prefer plant-based foods that taste like traditional counterparts, like plant-based beef or milk

Q: Choose "I prefer plant-based foods that taste like traditional counterparts, like plant-based beef or milks." or "I prefer plant-based foods that showcase the fruit or vegetable instead of mimicking another food." | Fielded **November 2021** (n = 1000)





SHOUK,
WASHINGTON D.C.
4 units



Health is a key factor.

38%

of consumers say the most important factor in plant-based foods and diets is the environment and animal welfare

62%

of consumers say the most important factor for plant-based foods is that they are healthy



A man with dark skin and curly hair, wearing a red sweater over a light blue collared shirt, is shown from the chest up. He has a wide-eyed, open-mouthed expression of surprise or excitement. He is holding a silver fork in his right hand and a silver knife in his left hand. The background is a solid, light blue color. The word "CRAVEABILITY" is written in large, bold, yellow capital letters across the center of the image, partially overlapping the man's chest and the utensils.

CRAVEABILITY

Recipe Inspiration with Chef Kevin



Thank you & Questions

Stay Connected!



Website: generalmillscf.com



[General Mills North America Foodservice](#)



Website: bellinstitute.com



[Bell Institute of Health & Nutrition at General Mills](#)

Additional Resources

Need some menu ideas?

Check out our new recipe book, **the full collection** and a video from Chef Kevin that is sure to inspire.



Culinary Inspiration Video: [link](#)
Dairy Free Recipes: [link](#)

Marketing Tools

- Point of sale danglers and clings for coolers
- Parfait lid stickers
- Social toolkit with imagery

Downloads



[Download](#)



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Dairy Free Instagram social assets Dairy Free Facebook social assets

Yoplait ParfaitPro® Dairy Free Rebate:



NEW

Save \$10 per case

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6 cases/560 maximum after rebate

June 1, 2022 - August 31, 2022