

Plant-Based

DRIVING INNOVATION THROUGH
CONSUMER UNDERSTANDING.

With emerging trends, and fluctuating consumer demand, the future of the plant-based meat industry continues to be in question. To address this white space, we set out to better understand and address consumer's key concerns with a targeted survey.

At Ajinomoto Health & Nutrition, data inspires innovation. Our plant-based solutions utilize our consumer understanding and expertise in food innovation to target **taste, texture, and nutrition.**

TOP CONCERNS WITH PLANT-BASED MEAT



What issues have you had eating plant-based imitation meats at home?
Please choose up to 3.

Ajinomoto consumer survey, N=2000 plant-based consumers, May 2023.



THE #1 REASON CONSUMERS TRY PLANT-BASED MEATS IS FOR HEALTH.

Consumers **turn to plant-based products for health reasons** but **stay for taste and texture**. A focus on health puts sodium levels at the forefront of consumers' minds, yet most products are loaded with sodium.

GROWTH OPPORTUNITIES

Cater to consumer interests by offering products lower in sodium to **better nutritionally compete with meat**. Ajinomoto Health & Nutrition delivers sodium reduction through umami and kokumi technologies, improving flavor and reducing the need for salt.

30% **HEALTH**

11% **REDUCE/RESTRICT MEAT**

10% **CURIOSITY**

10% **TASTE**

7% **SPECIFIC OCCASION**

6% **SOMEONE ELSE'S DIET**

"I like the taste of meat but sometimes I want something **healthier with the same flavors**"

"I'm **curious to see how much they are like actual meat**. If I find any that have a close enough taste and are reasonably priced, **I'd be happy to switch to plant-based** ones as I like the idea behind them"

Q: When you do so, why do you purchase plant-based imitation meats instead of meat?

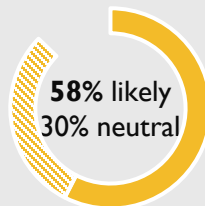


WHEN IT COMES TO PLANT-BASED MEATS, PRODUCT QUALITY IS MORE IMPORTANT THAN INGREDIENT STATEMENTS.

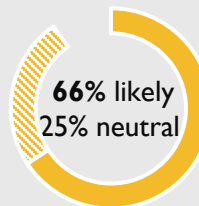
When directly asking consumers if they would be willing to purchase an improved product if it meant a longer ingredient statement, the answer was overwhelmingly, yes. This contradicts the clean label movement we see influencing product development, when instead, **consumers focus on product taste and texture**.

How likely are you to buy a plant-based imitation meat that had a longer ingredient statement, but improved the product?

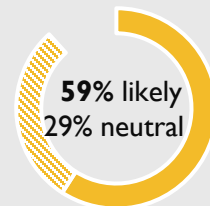
Total



Age 18-26



Ages 59-65



GROWTH OPPORTUNITIES

Rather than focusing on minimizing ingredients in a product, focus on delivering a product that meets consumer demands for taste and texture. Ajinomoto Health & Nutrition's portfolio includes proprietary masking technologies as well as enzymes to **achieve realistic meat-like tastes and textures**.

Eat Well. Live Well.



Bringing great taste and nutrition *full circle*



FEW CONSUMERS CITE ANIMAL WELFARE AND SUSTAINABILITY AS TOP REASONS FOR PURCHASING PLANT-BASED MEATS.

However, consumers are reducing meat consumption for other reasons and need better products to make the switch. Critiques of the plant-based market are quick to conclude that there is no interest or that products target the wrong audience. When asking consumers why they are purchasing more plant-based meats, top drivers include **health, general preference, and increased variety**.

GROWTH OPPORTUNITIES

While consumers are not satisfied with current offerings, **there is an interest in plant-based protein products for health reasons**. Focusing on improving the nutritional quality of plant-based offerings without compromising taste will meet consumers where they are.

In the next year, do you see yourself buying more or less plant-based meats?

Age 18-26



"Seems like **more options available** in stores and restaurants"

"I realized I **liked the taste**"

"Plant based protein has **come down in price and tastes better**"

"Trying to **lower my cholesterol and calorie intake**."

33% **BETTER FOR HEALTH**

18% **GENERAL PREFERENCE FOR PLANT-BASED**

11% **INCREASED AVAILABILITY**

10% **CHANGE IN DIET**

9% **MORE AFFORDABLE**

8% **PREFER THE TASTE**

4% **Sustainability**

4% **Purchase for household member**

4% **Trying something new**

2% **Animal welfare**

1% **Recommended by influencer**

Respondents who answered that they purchased more plant-based imitation meat were asked a follow-up open-ended question to describe their reasons. Q: Please say why in a few words. N = 816, 40.8% of total respondents of survey

This survey was conducted by Ajinomoto Health & Nutrition in May 2023 in 2,000 consumers who purchase plant-based meats; 70% were Gen z and millennials, and 56% cited some level of meat restriction.

One Partner. Endless Solutions

We're an insatiably curious, collaborative team of experts in culinary, food science and nutrition, bringing the joy of eating well and living well full circle.

Benefit Platforms



Taste

Flavor Enhancement
Unique Taste Solutions
Off-note Masking



Texture

Bonding
Mouthfeel



Nutrition

Sodium Reduction
Clean Label
Increased Protein

Umami & Kokumi Ingredients

These can be used to mask off-notes, enhance flavors and deliver realistic meat character, as well as full-bodied flavor.

*Glutamates, Yeasts & Yeast Extracts,
Nucleotides, Amino Acids*

Enzyme Systems

Enzymes solve for bonding and texture challenges to provide for a meat or dairy-like experience.

Enzymes/Transglutaminase

Culinary & Specialty Ingredients

Honor authentic culinary traditions that offer a variety of benefits from cooking behavior to health, taste, and texture.

*Vegan Stocks & Concentrates, Roasted
Sesame Oil, Tamari Soy Sauce, Mirin, Liquid
Shio Koji*



Contact Us

Scan this QR code to contact us about our plant-based solutions portfolio.