



## Flexitarian Lifestyle Post COVID-19

### Flexitarians dominate plant-based F&B usage

Flexitarians – those looking to incorporate more plant-based foods and beverages into their diets but still consume meat and dairy on occasion – represent ~85% of global committed plant-based lifestyle consumers (vs ~15% vegans + vegetarians)<sup>1</sup>. They find comfort and support with like minded people, but still exert individualism as there is no one way to live flexitarian.

#### Flexitarians share three core motivations:

Live a healthier lifestyle

Animal & environmental sustainability

Increase intake of whole plant nutrition

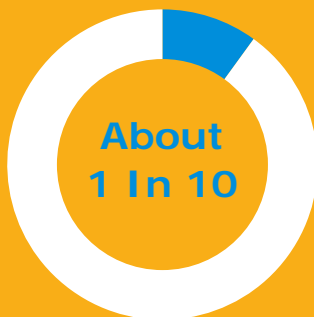
### COVID-19 has accelerated the Flexitarian movement

*The pandemic has elevated consumer health and safety concerns – which are linked to core flexitarian motivations – accelerating adoption and usage of plant-based meats...*

#### Among Global Flexitarians<sup>1</sup>:



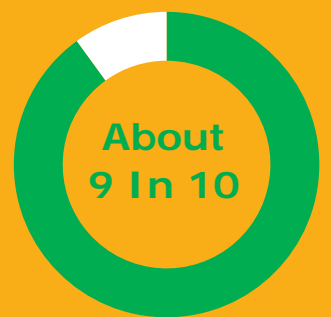
Increased use of PB meats due to COVID 19



Are new to category and started using PB meats in Apr-May



Reasons for increased use of PB meats



Will continue use of PB meats post COVID 19

*...driving an upward shift in plant-based growth curve and a larger user base to fuel future growth*

### Motivation Based Opportunities...

#### Healthier lifestyle

- Address perceptions that plant based products are overly processed via messaging and cleaner ingredient labels
- Add functional nutrients and nutrition claims (organic; high/added protein; etc) to appeal to Flexitarians looking to further improve their diets and lifestyle due to COVID-19

#### Sustainability

- Highlight health and safety based messages in near term during pandemic, with sustainability messaging a longer term opportunity
- Use credible clean label and environmental claims to increase trust
- Opportunity for cultured meat products

#### Whole plant intake

- Deliver assurances they are getting whole plant nutrition in messaging
- Leverage the health halo of 100% plant based products in innovation, which also cues the absence of animal ingredients

<sup>1</sup>ADM OutsideVoice<sup>SM</sup>