

FOOD INSIDER JOURNAL

Clean Label Strategy & Formulation

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Plant Protein: Feeding the Future of Food

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The Good Food Movement

Rising costs, sustainability concerns and the growing consumer desire to eat clean are just a few of the factors propelling the good food movement. Among the general population, the desire for clean labels, ease of digestion, the need or desire to avoid allergens, compatibility with vegetarian and vegan lifestyles, and concerns about sustainability are putting the spotlight on plant protein.

This movement away from animal protein consumption is resulting in the proliferation of protein-rich and protein-enriched products across an array of food and beverage categories. In fact, plant-based eating is so on-trend that some consumers are kicking traditional summer staples such as hamburgers and hotdogs to the side in favor of healthier, nutrient-dense products like jackfruit barbecue and black bean and quinoa burgers. Brands also are stepping up the innovation game by launching new and unique forms of foods made with protein-rich ingredients including ancient grains, chickpeas, pea, lupine and algal ingredients, just to name a few.

Consider the frozen food category, which consumers often view as being highly processed and laden with excess sodium and artificial ingredients. Growth in the frozen category is coming from higher-priced products offering premium ingredients, as well as those perceived to be healthier, more nutritious, and made from real and natural ingredients. In fact, data from SPINS found while frozen vegan products make up just 1 percent of the overall frozen market, they are growing at nearly nine times the rate of the overall category. The greatest growth is seen in categories like plant-based meat alternatives and entrées. Globally, data from Euromonitor International revealed similar trends with frozen plant-based meat substitutes boasting 47.6 percent in retail value between 2012 and 2017.

This month's Innovation in Action case studies examine how Sweet Earth Foods and Five Star Foodies realized whitespace in the plant-based food category, and the lessons that could be applied to your business.

Cheers,



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Plant-Based Protein:

Assessing Protein Demand for Sustainable Alternatives

by Pinar Hosafci

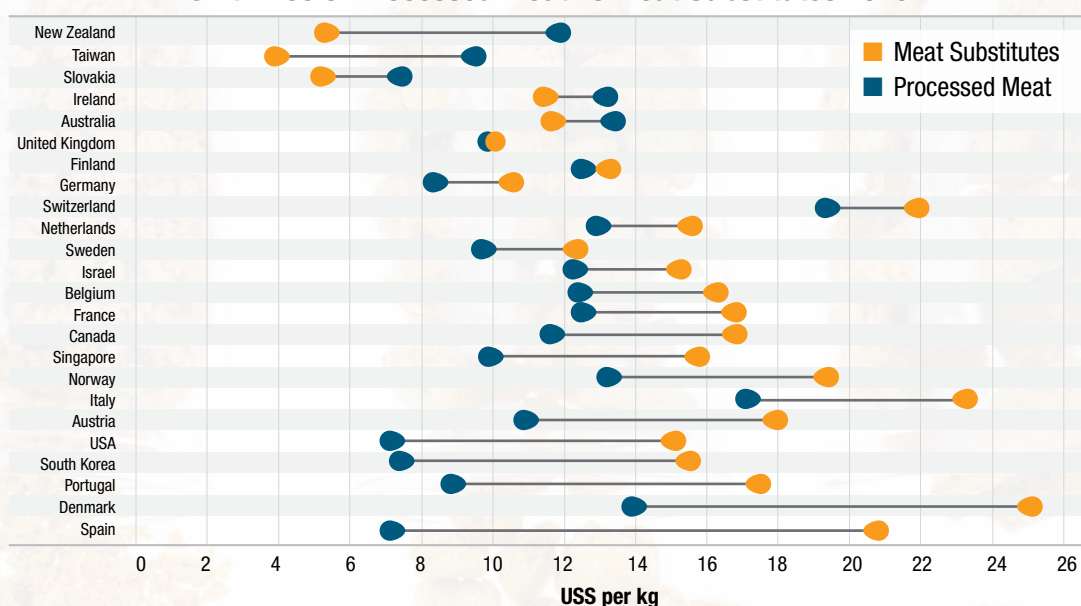
Protein is an indispensable part of the human diet, but the way it is produced today presents challenges, both for human consumption and its economic and environmental impact. Within developed markets, consumers eat more than the recommended amount of protein; however, most of this protein comes from animal-based protein sources. In fact, except for Japan and India, fresh meat and dairy tend to be the main contributors to protein purchases in the Top 10 packaged food markets across the globe, which puts strains on water, soil fertility, biodiversity and climate change.

Not only is society too reliant on animals as a direct source of protein, but most added protein to packaged food is sourced from animal-based ingredients. Caseinates, a protein commonly found in cow's milk, account for more than half the animal-based protein sources, followed by whey, which is another milk-based protein.

Meat Substitutes More Affordable

A key driver for the recent boom in plant-based alternatives for processed meat is the narrowing price gap. In New Zealand, Australia and Ireland, meat substitutes are less expensive than standard meat.

Unit Price of Processed Meat vs Meat Substitutes 2016





Pulses, Sea Plants Leading Sources of Plant Protein

As an affordable alternative to animal-based protein, pulses are ideal for improving diets in low-income areas, where the protein sourced from milk is often five times more expensive than that from pulses. Pulses are showing strong growth in emerging markets such as India, Mexico and Egypt. In addition, some varieties, such as soy beans, lupine, lentils and fava beans, have a high protein content, with lupine boasting 36.2 g of protein per 100 g—higher than beef with 26.6 g per 100 g.

Offering compelling nutrients such as fiber and omega fatty acids, and touting lower calories and carbon footprint than dairy and meat, plant sources are being promoted as natural, sustainable alternatives. These claims—paired with health concerns, such as lactose or gluten intolerance—have been major brand differentiators for top-selling plant-sourced brands, such as Alpro and Silk.

Soy beans are the most popular plant-based protein ingredient in packaged food, but only a fraction of them are consumed directly in a raw format, unlike quinoa, which is predominantly consumed raw. Soy is an important ingredient in milk alternatives, yogurt, cream and meat substitutes, as well as ice cream. However, in addition to its status as a Big 8 allergen and widespread skepticism of the ingredient among health-conscious Millennials, a growing number of consumers in developed markets are looking beyond soy to newer plant alternatives that are less likely to be sourced from genetically modified crops.

Peas, hemp, seaweed and ancient grains—such as chia, buckwheat and amaranth—are some of the more promising future sources. Peas and hemp could be compelling alternatives to cow's milk and dairy ice cream, while ancient grains, seaweed, moringa and insects will be most suited as auxiliary ingredients to savory snacks and baked goods.



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Gluten-Poor, Protein-Rich Ancient Grains

Ancient grains, which have traditionally been used by civilizations from the Aztecs to the Greeks, are being rediscovered and incorporated as auxiliary ingredients into baked goods, biscuits, snack bars, cereals and pasta. Pepperidge Farm, a subsidiary of Campbell Soup Co., has launched an ancient grain line under its Harvest Blends brand, and Hovis introduced a chia loaf in the U.K. in February 2016 in collaboration with The Chia Co., stressing its high content of omega-3s, protein and fiber. These new varieties are fueling sales of high-fiber bread, which was worth US\$24 billion globally in 2017, and is expected to reach \$28 billion by 2022, growing by a compound annual growth rate (CAGR) of 3.4 percent; well ahead of the overall bread market at 1.6 percent, according to Euromonitor International.

Breakfast cereals are following in the footsteps of bread, with Kellogg's launching the Ancient Legends range first in Australia and then in the U.K., General Mills launching Cheerios+Ancient Grains in the United States, and PepsiCo taking both its leading hot cereals brand Quaker and its ready-to-eat (RTE) cereals brand Real Medley into the super-grain range.

Chia seeds have recently risen to the top of the list of superfoods in several countries including the United States, U.K., Australia and Denmark, on the back of the smoothie trend. Many varieties of ancient grains, such as buckwheat, chia and teff, are naturally gluten-free, which further adds to their appeal, especially among health-conscious Millennials, who equate gluten-free with healthy.

Lupine: the Next Big Thing in Plant-Based Protein

Lupine is another plant-based protein that has the potential to substitute meat and compete with soy. Lupine proteins have two traits that other plant proteins do not: a neutral taste and an ability to blend water and oil. This makes lupine an attractive base for yogurt and ice cream, as it highlights the creamy and soft texture of these products. In addition to being a high source of protein, lupine helps enrich the soil with nitrogen and phosphorus, which are particularly good for the rye crop. Sauces and dressings is another potential application area.

While lupine flour has been used in some European countries as a replacement for soy in specialty breads and catering foods, it was not until 2016 that a dedicated brand was launched. Luve, which blends the words lu(pine) and ve(gan), is a German packaged food brand that has products ranging from pasta and milk to ice cream and frozen desserts, which are exclusively based on lupine.



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Chickpeas: Magical Replacement for Eggs, Milk

Aquafaba, chickpea water, is increasingly being used by chefs and vegan food companies as a replacement for egg whites, particularly in baked goods and condiments. The chickpea brine has similar functional properties to meringue, while being cheaper than eggs and boasting cancer-fighting properties. Fabanise, vegan mayonnaise from the U.S.-based condiment company Sir Kensington's, has put aquafaba on the map as a viable ingredient in food processing. The mayonnaise analogue has received positive reviews for its taste and texture, and will receive wide distribution in 2017.



Other milk alternatives, which include products such as **almond milk, coconut milk, cashew milk and oat milk**, are expected to hit **sales of \$10 billion** by 2022, while **soy milk** will reach **\$7 billion** by that same year.



Pea milk is being promoted as a sustainable alternative to other plant-based milk types, such as soy and almond. Unlike almonds, which require lots of water and are mostly grown in drought-hit California, and soy, which contributes to deforestation, peas are often produced locally and have a smaller environmental footprint. The American start-up Ripple introduced pea milk, derived from yellow split peas, to replace cow's milk. It joins hemp milk, brown rice milk and cashew drinks on the growing list of other alternatives in the now booming business of dairy alternatives.

Other milk alternatives, which include products such as almond milk, coconut milk, cashew milk and oat milk, are expected to hit sales of \$10 billion by 2022, while soy milk will reach \$7 billion by that same year. The growing demand for milk alternatives is not boding well for organic milk, at least in the United States, where the organic milk category has seen slower growth in 2017—a trend that is expected to continue over the next five years.

Soy and ancient grains are no longer the main alternatives to meat and dairy. Innovation is integrating high-protein pulses such as lupine and chickpeas, algal ingredients including spirulina, and insects into packaged food and beverages to develop new alternative proteins.

Demand for protein will continue to surge for meat, dairy products and eggs as incomes in emerging markets rise and people switch from cheaper nutrients like carbs toward more value-added nutrients like protein. From a sustainability perspective, developing new sources of protein both for human and animal consumption is therefore a major challenge, and critical for taking away the pressure on land use for agriculture, as well as reviving overstretched ocean ecosystems. 🌱

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Can Plant-Based Foods Save a Declining Frozen Category?

by Melissa Kvidahl Reilly

Highly processed. Bursting with sodium. Loaded with artificial ingredients. Frozen foods' reputation hasn't served the category well as consumers place greater value on clean labels versus convenience. According to Packaged Facts' "U.S. Food Market Outlook 2018" report, though the frozen dinner and entrée market posts an impressive \$10 billion in retail value, sales have declined at a compound annual growth rate (CAGR) of about 1 percent between 2012 and 2017. Dollars were down in all years and volume declined at an even faster rate, showing just how quickly consumers are stepping away from the freezer aisle.

from refrigerated offerings, as well as freshly prepared foods at retail—not to mention home-cooked meals.

Growth in the frozen category is coming from higher-priced products offering premium ingredients, as well as those perceived to be healthier, more nutritious, and made from real and natural ingredients, Packaged Facts reported. Natural, organic and "real" food resonate, the report stated, as do nutritious ingredients like beans and grains. Enter plant-based frozen food. According to Monica Klausner, co-founder of frozen plant-based meal delivery service Vestro, the segment "has exploded in the last five years, experiencing double-digit growth year over year." "Overall, the growth in plant-based frozen foods is spurred by Millennials looking for convenience, and the increased interest in better-for-you foods that are affordable," she added.

According to data from SPINS, though frozen vegan products make up just 1 percent of the overall frozen market (reaching \$800.5 million in sales), they are growing at nearly nine times the rate of the overall department at 27.2 percent year over year. The greatest growth is seen in categories like plant-based meat alternatives (up 32.3 percent since last year) and entrées

"The frozen food section at a traditional grocery store has historically been frowned upon, even though freezing food is a great way to maintain nutrients and freshness," explained Kelly Swette, CEO and founder of Sweet Earth Foods.

The problem, noted Packaged Facts, is the frozen aisle isn't the only place consumers can get convenient foods, and frozen's convenience is often outweighed by its unhealthy stigma. The report pointed out consumers can easily order fresh food for delivery or go out for it, which has been on the rise since the economy has improved. Plus, competition is fierce

Natural, organic and "real" food resonate, Packaged Facts stated, as do nutritious ingredients like beans and grains. Enter plant-based frozen food.

(up 18.4 percent). To compare, conventional frozen entrées have grown just 6.2 percent in sales during that same time, with frozen appetizers and snacks faring even worse with just 1.9 percent sales growth. Globally, data from Euromonitor shows similar trends: frozen plant-based meat substitutes have grown 47.6 percent in retail value between 2012 and 2017, and are expected to grow at a CAGR of 3.3 percent through 2022.

This small but mighty segment has a way to go, though. According to the “Plant-Based Proteins - US,” report from Mintel published January 2018, poultry, red meat and shellfish are all consumed significantly more (and more often) than plant-based alternatives. In fact, nearly two-thirds of consumers indicated to Mintel they never consume such alternatives. But the report also pointed out significant investment from major brands like Nestlé and Hormel Foods in plant-based research and development (R&D), indicating a realization that strong potential exists.

Category Drivers

Several drivers are responsible for the increased interest in plant-based frozen foods. First is the overall health halo that accompanies plant-based products and frozen fruits and veggies.

Consumers often rank plant-based foods over animal-based ones when it comes to health. According to Mintel’s “The Protein Report - Meat Alternatives in the US” published January 2017, 46 percent of Americans believe plant-based proteins are better for people than animal-based proteins, and 76 percent say plant-based foods are healthy. Consumers shop plant-based alternatives for several reasons, including their desire to avoid processed foods (39 percent), manage weight (31 percent) or promote muscle growth (16 percent)—all arguably health-related reasons that have the capability to boost sales in the frozen aisle.

Plus, consumers often prefer frozen fruits and veggies over canned in their pursuit of freshness and high nutrient value. “The perk of frozen, unlike many dry packaged foods, is that freezing allows the product to remain fresh without having to pump it full of preservatives,” said Elsha DeJong, director of sales at Five Star Foodies. “This aligns very well with not only the plant-based movement, but the general healthy, better-for-you movement as well.”

Of course, parents are leading the way in the plant-based frozen food aisle, as they are in other clean label categories. The differentiator, though, is that parents seem to especially love shopping the frozen aisle. Mintel’s “Frozen Snacks - US - May 2018” report found 85 percent of households with children reported their kids eat frozen snacks. Plus, Packaged Facts’ “Frozen Foods in the US” report found households with children under the age of 6 use frozen pizza and snacks at a higher-than-average rate, and households with kids ages 12 to 17 are more likely than any other demographic to buy frozen entrées and snacks. Incidentally, parents are also the same demographic that told Mintel reading labels is important to them, so frozen snacks that remove red flag ingredients and offer health attributes—like plant-based options—are poised to resonate well.



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Mintel’s “Frozen Snacks - US - May 2018” report



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“Many consumers are experimenting with vegetarian and vegan diets, and finding they simply feel better eating this way.”

— Andy Reichgut, executive vice president, Garden Lites



Another driver in this sector is the rise of flexitarian dieters; Mintel’s “Plant-Based Proteins - US - January 2018” report said the top reason U.S. consumers use meat alternatives is because they occasionally like to have meat-free days (31 percent). “Many consumers are experimenting with vegetarian and vegan diets, and finding they simply feel better eating this way,” said Andy Reichgut, executive vice president of Garden Lites, the brand behind zucchini- and carrot-based frozen muffins, the 2014 SupplySide CPG Editor’s Choice Awards winner in the frozen food category. “The early adopters tend to be influencers within their social circle and have become evangelists for this way of eating, driving their friends and family to give it a try.”

That’s why Eugene Wang, CEO and founder of Sophie’s Kitchen, is also pointing to increased smartphone and social media usage as a driver in the plant-based frozen segment. Once consumers try a plant-based lifestyle—even as a test run—they may share their experiences online. “Smartphones and social media have led to easy access to information; and vegan, plant-based bloggers, enthusiasts and vegan celebrities are driving the trend,” he said.

Social media is also a huge driver for Five Star Foodies, with DeJong pointing out that in addition to plant-based food-bloggers and influencers, everyday consumers are sharing their Meatless Mondays posts, and spreading the word.

Ingredient Trends

Though plant-based frozen foods carry an inherent health halo for many shoppers, it is just the baseline for clean label consumers who demand more. “The people looking to introduce more plant-based foods into their repertoire are almost always looking to find ways to be holistically healthier,” Reichgut asserted. “Therefore, clean label is a cost of entry for these folks.”

In other words, said Meriterese Racanelli, R&D food science and nutritionist for Goya Foods, these consumers understand “products listed as plant-based (or even organic) can still be unhealthy with high amounts of sodium, sugar, saturated fats and more.” As a result, additional clean label attributes are in demand and resonating with consumers in the plant-based freezer case.

For Wang, the No. 1 issue is non-genetically modified organisms (GMO), and the data supports it. While organic plant-based frozen foods are performing quite well, reaching 17 percent growth overall, noted SPINS, non-GMO offerings have grown 25.5 percent and garnered a larger portion of the market share. The most popular non-GMO frozen vegan categories were appetizers and snacks (up 13.7 percent in retail sales) and entrées (up 16.1 percent). Frozen plant-based meat alternatives with non-GMO labels grew a whopping 37 percent, reaching more than \$161 million in sales.

“Products listed as plant-based (or even organic) can still be unhealthy with high amounts of sodium, sugar, saturated fats and more. As a result, additional clean label attributes are in demand and resonating with consumers in the plant-based freezer case.”

— Meriterese Racanelli, research and development food science and nutritionist, Goya Foods





But, again, non-GMO seems to be just the beginning as far as clean label demands impacting plant-based frozen foods. “Consumers want unique whole food ingredients, short ingredient lists, bold flavors, allergen-friendly offerings, and health perks like high protein, low carb, low FODMAP, paleo and more,” DeJong said, “and, obviously, the convenience of being able to simply heat and eat.” Simply put: it’s all about the ingredient list.

At Five Star Foodies, formulators work with ingredients that bring new and exciting flavor profiles, which translates to varieties like the Artichoke Burger and Pumpkin Seed Frittata. “Offerings in frozen plant-based foods have been extremely limited and dominated by either processed proteins (soy, textured vegetable protein, pea) or boring and bland ingredients and flavors,” DeJong said. “There’s nothing wrong with a black bean burger; but when it’s the only option for years, it’s time to switch it up.”

Five Star Foodies selects its ingredients based on flavor, consistency, uniqueness and health benefits. Artichokes, she said, are extremely unique in the market and offer a sweet flavor and great texture. Cashews, also featured on the brand’s ingredient lists, have great taste and texture but also provide healthy fats and protein. “The key is finding the sweet spot in offering the best-tasting and highest-quality products while keeping them at a manageable price point,” DeJong said, adding the brand’s customers opt for ingredients they recognize over, for example, high-protein claims supported by processed ingredients.

Premium ingredients are also the focus at Saffron Road Food Inc., said CEO Adnan Durrani. Ingredient lists include the likes of organic chickpeas, small batch and handcrafted paneer, gluten-free noodles imported from Thailand, non-GMO verified and gluten-free reduced-sodium tamari, poblano peppers, turmeric, fenugreek leaves and ginger. “We chose these since our value system and brand promise at Saffron Road is always to go the extra mile in terms of culinary excellence and clean label foods,” Durrani said. Frozen plant-based offerings include Vegetable Pad Thai, Enchiladas al Chipotle, and Palak Paneer.



“We chose these since our value system and brand promise at Saffron Road is always to go the extra mile in terms of culinary excellence and clean label foods.”

— Adnan Durrani, CEO,
Saffron Road Inc.

Ingredient lists include the likes of organic **chickpeas**, small batch and handcrafted **paneer**, gluten-free **noodles** imported from Thailand, non-GMO verified and gluten-free reduced-sodium **tamari**, **poblano peppers**, **turmeric**, **fenugreek leaves** and **ginger**.



The plant-based seafood alternatives offered by Sophie's Kitchen, including frozen Vegan Smoked Salmon, Vegan Breaded Shrimp, Vegan Crab Cakes, and Vegan Breaded Fish Fillets, rely on sustainable ingredients, mainly konjac (Japanese yam) and yellow pea. "We chose these two ingredients over anything else mainly for sustainability and clean label issues," Wang said. "Konjac has been grown in Asia for centuries and it is a highly sustainable plant. Yellow pea is agreeable to more consumers, and has a cleaner image, than soy."

Another ingredient category making waves in the plant-based frozen food space is superfoods. Pizzey Ingredients, for example, offers the PurFlax line of premium flaxseed products that includes BlendPur and the more finely ground BevPur. These are "ideal for plant-based frozen products, as they can be used to replace eggs and other binders in meat alternatives and can be used to replace gums in plant-based frozen desserts," said Julie Faber, director of marketing. "These products both contain all the components of flaxseed, including omega-3s, lignans, protein and fiber."



“Konjac has been grown in Asia for centuries and it is a highly sustainable plant. Yellow pea is agreeable to more consumers, and has a cleaner image, than soy.”

— Eugene Wang, CEO and founder, Sophie's Kitchen



“This falafel, and ideas like grain-and-veggie tots or bites, would perform particularly well as a frozen appetizer, where they would heat well and not get dry.”

— Jason Gronlund, technical sales manager of food service and chef, Ardent Mills



Ardent Mills meets demand for frozen-friendly superfoods, having recently created Great Grains Falafel featuring the company's Great Plains Quinoa, red quinoa, Nature's Color IQF Pure-Purple Barley, White Sonora Wheat Berries, Spelt and Sustagrain Barley. "These had a great texture, with a crisp exterior and moist center," said Jason Gronlund, technical sales manager of food service and chef. "This falafel, and ideas like grain-and-veggie tots or bites, would perform particularly well as a frozen appetizer, where they would heat well and not get dry."

On the shelf, superfoods are found in Sweet Earth Foods' Planet Pepperoni, Benevolent Bacon and Harmless Ham (available in deli slices and stand-alone product as well as featured in frozen breakfast sandwiches and other offerings), which are based on the core protein source of wheat-based seitan. According to Swette, it features three times the protein of tofu and follows a recipe perfected by Buddhist monks in the 6th century. The brand's portfolio also emphasizes superfoods like legumes, quinoa, flax and chia seeds, which not only offer nutritional benefits but also bring texture, color and aroma to the dishes, Swette said. Superfoods are also front and center at The Tofurky Co., which offers Hearty Hemp Burgers, White Quinoa Burgers, and Indonesian tempeh cakes in the frozen case.



“The advantage of being an online brand is that we can differentiate ourselves from the frozen meals in store, by highlighting the benefits of a plant-based diet in an engaging and nonjudgmental way.

— Monica Klausner, co-founder, Veestro

Challenges and Solutions

Despite significant growth from the plant-based frozen sector, it is not without challenges. First, simply because it's frozen, this sector does experience some pushback from clean label shoppers. “Legacy brands are having tremendous difficulty overcoming this stigma, even as they work hard to overhaul their ingredient statements and nutritional profile,” Reichgut said. “Among many groups of consumers, in particular Millennials, these brands will never enter their consideration set.”

Durrani agreed big consumer packaged goods (CPG) companies are having an issue convincing clean label shoppers their plant-based and rebooted offerings are indeed healthier. “Frozen fruits and veggies in the organic and natural segment have been able to cross over this rubicon recently, and for many consumers, are considered to be better than fresh since the nutrients are locked in, versus buying fresh produce that may already be one month old by the time it's on the retail shelf,” Durrani said. On the heels of this realization, he added, some iconic frozen brands have been pushing this narrative as it pertains to their products, without actually upping the quality or changing the ingredient panels of the products—a tactic that won't work with eagle-eyed clean label consumers.

Direct-to-consumer (D2C) brands like Veestro manage to sidestep this issue altogether. “The stigma is still there, but I think it's more prevalent in retail since there is not much opportunity for education on the spot,” Klausner said, comparing retail to D2C brands that can educate and inform through online channels and other points of contact. “The advantage of being an online brand is that we can differentiate ourselves from the frozen meals in store, by highlighting the benefits of a plant-based diet in an engaging and nonjudgmental way.” For retail brands like Five Star Foodies, building consumer awareness with packaging at the store level has helped this issue, as has organically building brand awareness via social media and in-person at “veg fests” and other unique events, DeJong added.

What Durrani and Reichgut both agree on is while this stigma is a huge problem for huge brands, smaller niche brands don't face a similar challenge. “By being die-hard in terms of clean ingredients, authentic culinary traditions, quality and taste—as well as transparent in terms of the sourcing and certification standards—we at Saffron Road have found much less of an issue with the unhealthy stigma consumers, especially Millennials, associate with some older legacy overprocessed frozen brands,” Durrani said.

Despite significant growth from **the plant-based frozen sector**, it is not without challenges. First, simply **because it's frozen**, this sector does experience some **pushback from clean label shoppers**.



“The challenge is clean label and plant-based seekers don’t want to sacrifice on taste when choosing to eat healthy. And why should they?”

— Tara Rozalowsky, brand director, better for you & licensed brands, Conagra Brands

Reichgut agreed startup brands seen as authentic don’t experience the stigma and will be considered healthier by most demographic groups. “These brands not only offer truly healthy food, but also usually have a brand purpose that goes beyond just healthy foods,” he added.

However, Tara Rozalowsky, brand director for better for you & licensed brands at Conagra Brands, noted a different concern for plant-based frozen food brands large and small. “Barriers to trying (and switching to) more meatless options include concerns like taste. That a plant-based meal won’t taste as good as a meat-based meal, or that plant-based meals won’t have enough protein to keep you full and energized throughout your day.” The challenge is clean label and plant-based seekers don’t want to sacrifice on taste when choosing to eat healthy. “And why should they?” she suggested.

Different brands have different approaches to solving the taste stigma associated with plant-based frozen foods. Garden of Eatin’ relies heavily on sampling, since trying products is a surefire way to convince shoppers of tastiness. Conagra is working to disprove this stigma with bold flavors like its plant-based Healthy Choice Power Bowls in Mango Edamame, White Bean and Feta Salad, Falafel and Tahini, and Cauliflower Curry (each bowl contains up to 16 g plant-based protein and 16 g fiber). Vestro takes a different approach, offering meals like Country Fried Chick’n, Mac and Cheez, and Enchilada Casserole. “By providing meals that are familiar, we tear down one of the hurdles to adoption,” Klausner said. “The idea that vegan food is foreign, weird or tasteless.”

“In most retailers, the plant-based food is located in a unique, separate merchandising space in the frozen case, largely targeting vegan and vegetarian shoppers. This limits visual access to meat reducers and flexitarians who may not shop this section.”

— Chuck Muth, chief growth officer, Beyond Meat

Retail placement is yet another hurdle for plant-based frozen food brands. Chuck Muth, chief growth officer at Beyond Meat, noted, “In most retailers, the plant-based food is located in a unique, separate merchandising space in the frozen case, largely targeting vegan and vegetarian shoppers. This limits visual access to meat reducers and flexitarians who may not shop this section.” To increase exposure, Beyond Meat stepped out of the freezer case to merchandise varieties of Beyond Burgers and Sausage in the fresh refrigerated meat case. This is a trend to watch going forward, Wang said, as more manufacturers fight for freezer space and convince retailers to place plant-based products next to animal-based ones.

Erin Ransom, director of marketing at The Tofurky Co., surmised, “I can only see continued innovation and expansion of the plant-based set in the frozen foods category. Consumers vote with their dollars every day with respect to the types of products they like to see on shelf.” So whether that shelf is integrated with animal products or in a section all its own, the future looks bright for plant-based frozen foods. 🌱





Sugar
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Intellectual Property Trends in Protein Innovation

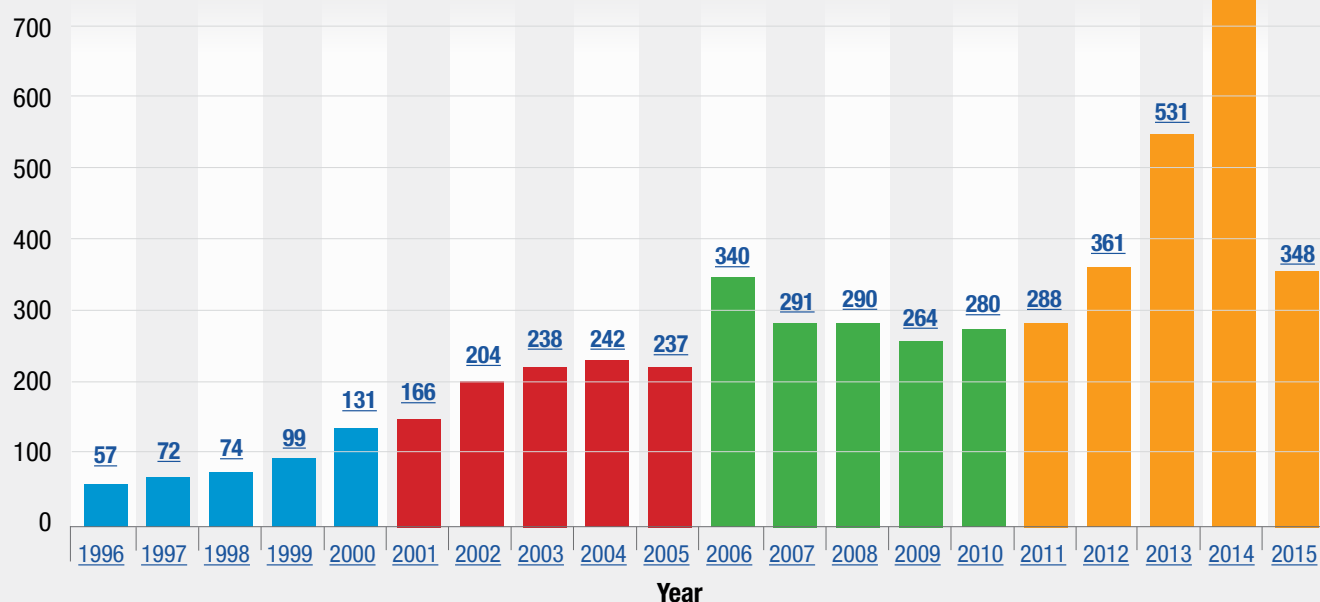
by Andreas Baltatzis and Gideon Eckhouse

Protein products have expanded beyond their initial market of sports nutrition into consumers' everyday diets. With this expansion comes the need for innovation in protein sources, improved taste and delivery, and functional products meeting specific consumer needs. Depending on the source, various proteins may be deficient in certain essential amino acids or may cause an allergic reaction. In addition to creating new products, innovative companies must establish distinctive brands to stand out in a crowded marketplace.

Patent applications directed at protein-related inventions peaked in 2014 and were followed by a 55 percent decline in 2015. Whether the decline was a return to the mean or the indication of a new market trend remains to be seen. The decrease in patent application filings could be due to restrictions on patenting naturally derived products (instituted in 2014), which has a limiting effect on new patent applications.

Patents are classified based on the type of invention claimed. Subcategories related to proteins include amino acids, peptides, vegetable proteins, dairy proteins and proteins from microorganisms. Companies developing new products should consider patents in their areas of interest for identifying whitespace and freedom to practice.

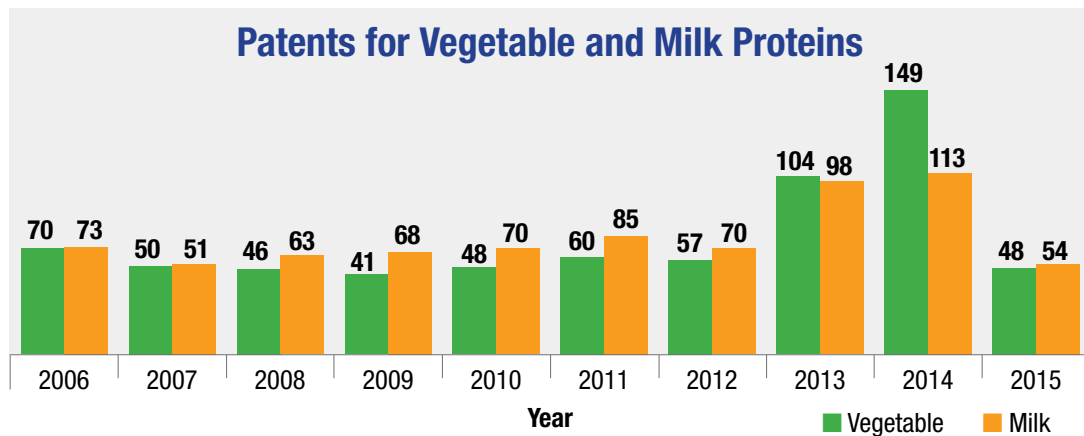
Protein Patent Applications by Year



Protein Inventions as Classified in Patent Applications

| Classification | Application Number |
|--------------------------------|--------------------|
| Amino acids | 2,028 |
| Peptides; Protein hydrolysates | 1,739 |
| Vegetable proteins | 1,066 |
| Dairy proteins | 1,273 |
| Proteins from microorganisms | 127 |

Vegetable sources of protein may meet specific consumer health needs or preferences; however, they may be difficult to isolate and may not contain all the essential amino acids. While milk sources were previously the main target for innovation, plant-based protein has recently overtaken milk as the focus of patent activity.



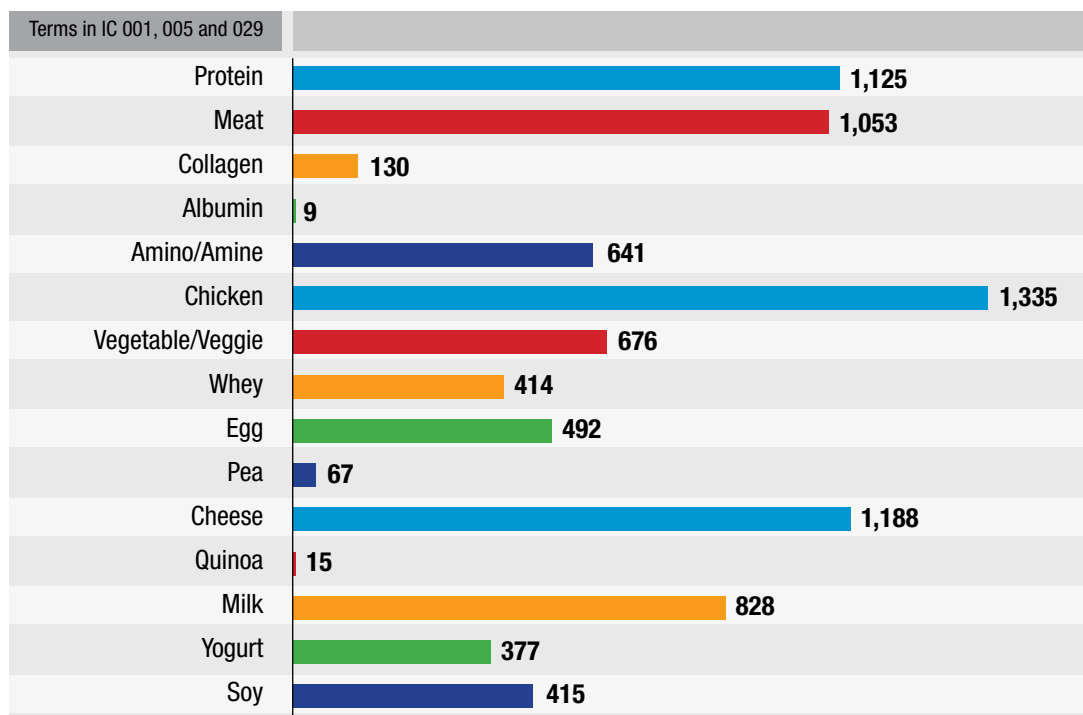
Leading protein innovators include companies with a history of creating nutrition and food products. Since dairy is a major source of protein, several dairy companies also have substantial patent portfolios related to protein innovation.

Leading Protein Patent Holders

| Company | Applications | Company | Applications |
|--|---------------------|--|--------------------|
| Nestlé/Nestec | 311 | Unilever | 66 |
| Abbott/Abbott Laboratories | 165 | Mead Johnson Nutrition | 65 |
| Nutricia | 144 | Solae | 55 |
| Ajinomoto | 113 | Kyowa Hakko | 55 |
| Megmilk Snow Brand | 73 | Meiji | 46 |
| DSM | 66 | Fuji Oil | 44 |

Manufacturers and retailers of protein-containing products must convey to consumers that the product contains protein, as well as find a distinctive name that separates them from other products. Registering a trademark includes classifying the goods with the name it will use. For protein products, three of the most important classifications of goods include International Class 001 (for protein ingredients used in products), International Class 005 (for dietary supplements containing protein) and International Class 029 (for certain types of foods).

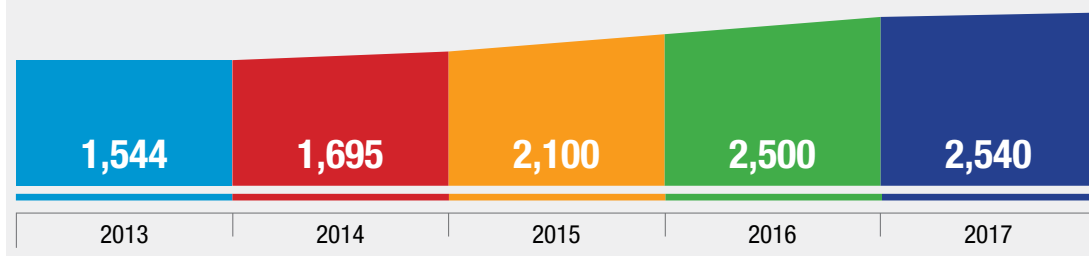
Terms Used in Protein Trademarks



These terms include common words that do not convey distinctive ownership of a brand. Therefore, successful trademark registration relies on coupling these terms (which convey a component or ingredient of the product) with a novel term, an established company name, or term that does not immediately describe the product. Creativity combined with easy-to-understand information can result in a brand name that stands out in the mind of consumers and tells them what to expect from the product.

The classification of goods must be specific to how the trademark will be used. More brand owners described the goods associated with the mark using the term “protein” as compared to using “protein” in the name itself.

Trademarks That Use ‘Protein’ to Describe Product



During the last five years, the occurrence of the term “protein” steadily grew in trademark filings. This may indicate a greater market for protein products and a greater need to protect them.

One final consideration of trademarking protein products relates to using the name. A trademark cannot be registered without first proving that the mark is used to sell the product to consumers. This can be a challenging requirement for some types of protein products, such as the ones that are included in other finished products. Manufacturers do not always label their protein ingredients when they are sold to formulators, retailers and other downstream actors. Aside from directly labeling the product they sell, manufacturers may require listing their product among the ingredients in the consumer facing label. This should satisfy the requirements for proving use while simultaneously building goodwill and brand recognition. 🌱

Attorney Andreas Baltatzis is a director at KramerAmado PC, a boutique law firm specializing in intellectual property (IP). He represents a number of innovative nutritional supplement and nutraceutical companies that improve people’s lives every day. Baltatzis also helps companies prepare and implement IP strategies by obtaining patents and trademarks that protect their innovations and cash flow, as well as advising clients on successfully launching new products and brands.

Gideon Eckhouse is a senior associate at KramerAmado, with more than 10 years of experience in patents and trademarks. He assists innovative nutritional supplement and nutraceutical companies in protecting their IP throughout the world. Eckhouse counsels and implements global trademark strategies for new brand launches. Additionally, he prepares and prosecutes patent portfolios protecting new products coming to market.

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FIVE STAR FOODIES & THE VEGAN FRITTATA

by Ginger Schlueter

For Elsha DeJong, growing up as the only girl out of five children must have been difficult. Equally as difficult was her vegetarian mother's decision to provide her children a healthy, plant-based diet in the 1980s and early '90s when such options were limited. Back then, the plant-based options didn't meet DeJong's or her brothers' expectations of flavor, or her mom's expectation of quality. So, as moms often do, Valerie Williams got resourceful, taking her previous knowledge of owning a vegan restaurant and doing what she knew best—firing up her kitchen stove and cooking.

"I feel incredibly grateful to have grown up with a mom who knew what hormones, high fructose corn syrup (HFCS) and aspartame were years before people even thought to question what was in their food," DeJong said.


This passion was passed along to her children and one fateful day, she and her three oldest sons decided to build a business based around their shared love of food. Five Star Foodies LLC (Foodies) launched in 2006, offering vegan burgers and cold-pressed ciders.

Five Star Foodies

Headquarters: Cincinnati
foodiesvegan.com

"I was raised on a number of home-cooked veggie burgers," said DeJong, now director of sales for Five Star Foodies. "In fact, my high school's culinary club had an iron chef challenge and the ingredient was artichokes. I made my family's famous artichoke burger and won."

The winning hasn't stopped for Five Star Foodies, as success has been found in the "good food" plant-based marketplace for more than 10 years. The beauty of the company is found in the kitchen where three generations work together daily—grandma, mom, aunts, kids and cousins. These generations often dance and sing to a Rihanna playlist while preparing their vegan cuisine for consumers, according to the website. It's perhaps moments like this that make winning possible, DeJohn said.



The family-based team noticed a lack of availability, quality and flavor in the plant-based, protein-rich frozen food products in retail freezers.



Joining the Good Food Revolution

Identifying white space in a market is one thing, but taking the leap to fill it is chock-full of celebrations and obstacles along the way. The family-based team noticed a lack of availability, quality and flavor in the plant-based, protein-rich frozen food products in retail freezers. With such a close-knit family and the right recipes, they jumped into the world of food, getting Williams' finished products into the hands and mouths of consumers.

The first three years in business were spent building a solid foundation starting with designing the brand; figuring out packaging, product offerings and sources; and dabbling in the local marketplace, selling at the farmers market and a nearby Whole Foods Market, DeJong said.

As the business expanded to further locations, the family faced a big challenge—finding a distributor that was willing to work with a small company. “My mom and brother would drive eight hours from Cincinnati to Washington D.C. with product on dry ice and distribute cases to the Whole Foods stores there,” DeJong recalled, adding they would demo the products, drive home, produce more and return a few months later. The cycle seemed never-ending.

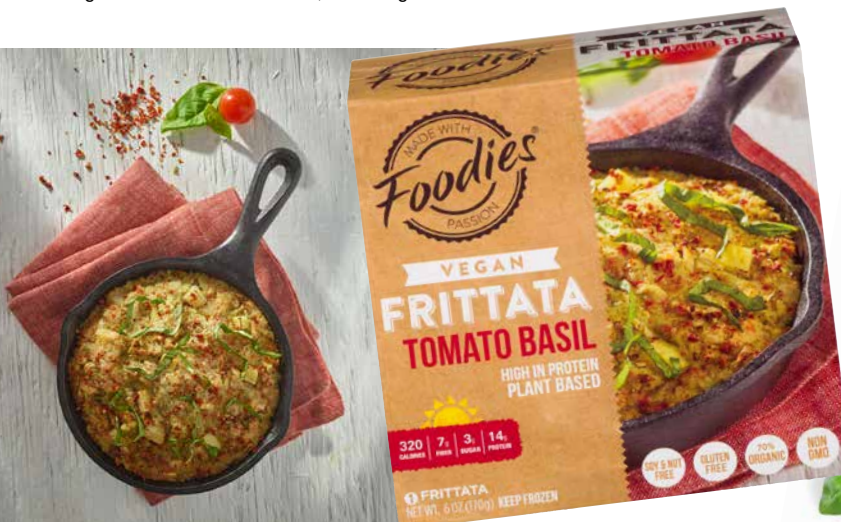
“When you run/work for a small business, the cliché phrases ‘blood, sweat and tears’ and ‘labor of love’ take on a whole new meaning,” DeJong said, recalling the family would pack and seal every burger, hot-glue every box, tape shut every case, pack it all up and repeat—all by hand because they didn’t have the capital to purchase necessary equipment.

Foodies eventually launched with its first distributor and worked its way up to six, currently. The brand also was picked up by the mid-Atlantic region of Whole Foods and conventional grocery chain Kroger. “I like to say we ‘courted’ Kroger, since it took almost two years of meetings, updates to packaging, and lots of back and forth before they were willing to take a chance on us,” DeJong noted.



“I feel incredibly grateful to have grown up with a mom who knew what hormones, high fructose corn syrup (HFCS) and aspartame were years before people even thought to question what was in their food

— Elsha DeJong,
director of sales,
Five Star Foodies





Selling products in both natural and conventional channels allowed Foodies to start working with a broker that assisted in building store counts for wider distribution, and provided knowledge and insight regarding food industry requirements.

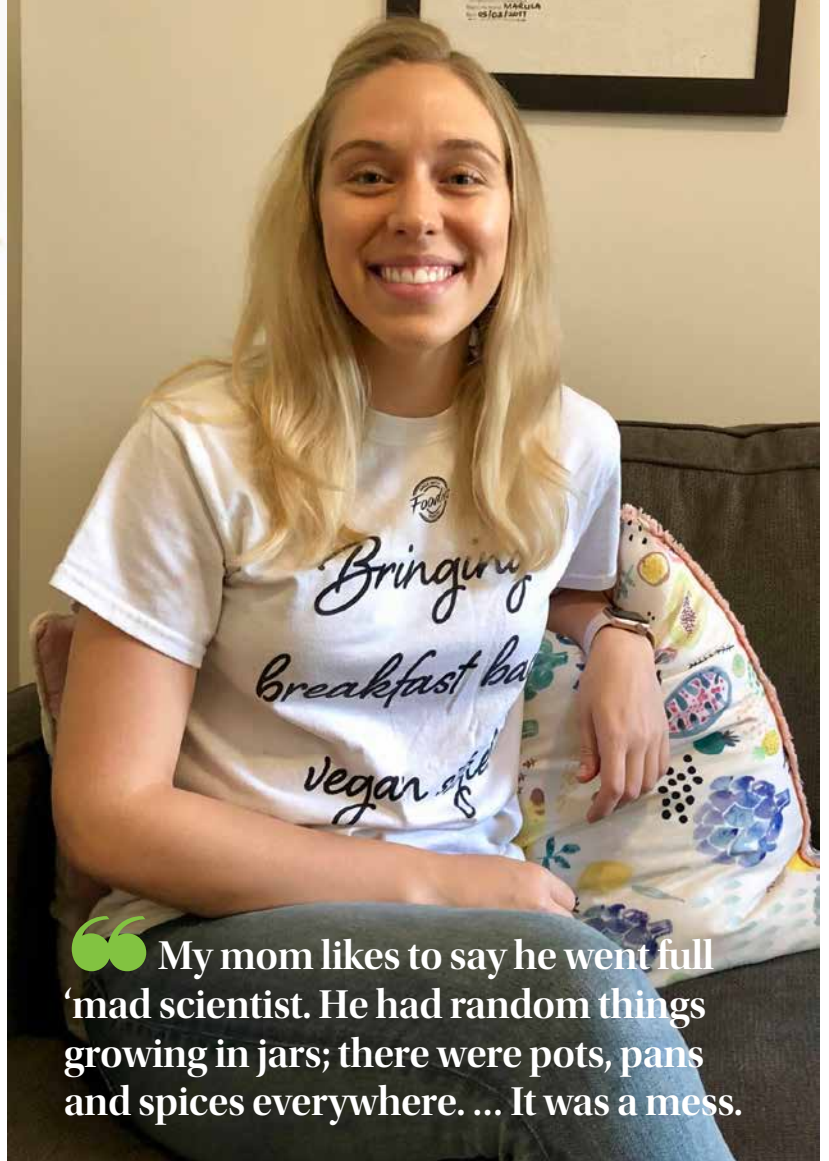
DeJong indicated sourcing high-quality ingredients has always been a costly challenge; however, meeting consumers' fickle demands has proven more daunting. As an example, a small amount of organic sugar is used in Foodies' artichoke burgers to help make the flavors pop. After receiving a few complaints about the added sugar, Foodies removed it, but received even more complaints that the burgers weren't as flavorful. Ultimately, the organic sugar was added back. "We realized we can't please everyone," DeJong shared, along with the revelation that overcoming obstacles takes "a lot of patience and faith."

Pumpkin Seed Frittatas Debut

The decision to stop producing gluten-containing veggie burgers and apple ciders gave Williams and her family time and resources to focus solely on growing their brand and launching new products. Together with one of Williams' sons, who heads research and development (R&D) for Foodies, the two created a vegan, gluten-free, soy-free frittata made with pumpkin seeds. "This became my brother's food child," DeJong said, noting her brother spent months developing the perfect texture, flavor and nutritional attributes.

"My mom likes to say he went full 'mad scientist,'" she said. "He had random things growing in jars; there were pots, pans and spices everywhere. ... It was a mess."

After many failed attempts with different seeds and vegetables, he finally hit the sweet spot with the pumpkin seed mixture the company currently



Elisha DeJong, director of sales, Five Star Foodies

“My mom likes to say he went full ‘mad scientist. He had random things growing in jars; there were pots, pans and spices everywhere. ... It was a mess.”

uses to create three flavors of the frittata: Potato Parsley, Corn Chipotle, and Tomato Basil. Each flavor contains organic pumpkin seeds, organic onions, apple cider vinegar, sea salt, spices and other ingredients.

Deciding to launch a frittata fit into Foodies' production line well because it has a similar shape and size as its most popular product, the artichoke burger. Also, a frittata isn't commonly seen in a grocery store, let alone in the frozen section—especially one with all the attributes of Foodies' pumpkin seed frittatas, DeJong noted.

"The plant-based breakfast category is extremely limited," explained DeJong, and the few vegan options available are either made with soy or gluten. "We believe our pumpkin seed frittatas are a game-changer and are bringing breakfast back, vegan style."

Potato Parsley, Corn Chipotle, and Tomato Basil.

Each flavor contains organic pumpkin seeds, organic onions, apple cider vinegar, sea salt, spices and other ingredients.





Small But Mighty

Foodies currently has a small team, only five full-timers and part-time help as needed, but at the end of the day, everything gets done. The business even contributes to sustainability and helps others who are in need.

"We do as much as we can ... such as send free samples to events, hire employees who have a criminal record, and give free products to them and their families," DeJohn said. "We also run a tight ship, production-wise, and are very proud of our minimal waste."

Foodies is also WBENC (Women's Business Enterprise National Council)-certified as it is a woman-owned business. WBENC is a certifier and advocate for woman business owners and entrepreneurs. WBENC certification helps "from a business perspective," she explained, "in that [most] retailers and brokers have supplier diversity programs; so, when they see our certification, it helps build our appeal."

Through all the challenges and late nights, not much has changed in terms of Williams' original goal: to create food that tastes good and makes people feel good.

"We truly believe in the power of food; its ability to connect people, to inspire a healthy lifestyle, and to create a better and happier world," DeJong concluded. 🌱

to create food that
tastes good and makes
people feel good

Food For Thought

Relying on past experiences, successes and obstacles can bring a product to market that fills a white space.

It can take years to get products into retail outlets; be persistent.

To create a successful company, truly love the job, what's produced and the customers who purchase.





Sweet Earth Foods: Flavor-Forward Plant-Based Foods

by Joanna Cosgrove

Eating a fruit- and vegetable-rich, plant-based diet has long been linked to a cascade of health benefits, including a decreased risk of obesity, heart disease and diabetes. It also contributes a favorable impact on overall environmental sustainability. For the folks at Moss Landing, California-based Sweet Earth Foods, there's only one thing that can make plant-based eating even more appealing than it is already—convenience. The company's unique take on crafting convenient, plant-based foods caught the attention of food giant Nestlé, which acquired the company late last year.

In its press release announcing the Sweet Earth acquisition last fall, Nestlé said it anticipated an upward swing in the penchant for plant-based foods, hallmarked by double-digit growth and a forward-looking value of US\$5 billion by 2020. "As many as 50 percent of consumers now are seeking

Sweet Earth Foods

Headquarters: Moss Landing, California
sweetearthfoods.com

more plant-based foods in their diet and 40 percent are open to reducing their traditional meat consumption," said Paul Grimwood, Nestlé USA chairman and CEO, in a statement.

Kelly Swette, Sweet Earth Foods' CEO and co-founder, said, "At Sweet Earth, we see the potential for plant-based foods to make a major impact on how America and the world eats. With our food, one has the convenience of frozen products—affordable and ready when you need them—without compromising on flavor, premium ingredients and nutritional value."



Co-founded in 2012 by Swette and her husband Brian Swette, president, Sweet Earth's current headquarters—a picturesque coastal town known for its agriculture—is just a stone's throw from the company's point of origin in nearby Pacific Grove, California, where it originated as a small health foods store. The company now markets 67 vegan and vegetarian products across 10 product categories including burritos, artisan bowls, breakfast sandwiches, empanadas, veggie burgers and fresh salad kits, sold in 12,000 retail locations nationwide across traditional grocery, mass market and the natural channel. Its most recent products are a new line of pizzas, available in four flavors: Veggie Lover's™, Protein Lover's™, Truffle Lover's™ and Herb Lover's™. The pizzas were the product of six months in the research and development (R&D) pipeline before finally hitting the market in June 2018.

"The frozen food section at a traditional grocery store has historically been frowned upon, even though freezing food is a great way to maintain nutrients and freshness," Swette commented. "We wanted to make the frozen food aisle a healthier, more delicious place nationwide. But beyond that, we wanted to change the way people eat. What's more important than what we put into our bodies?"

For Swette, the Nestlé acquisition served as a signal to the broader market that the plant-based food movement is very much for real, as well as validating Sweet Earth's sustainability mission.

Clean Label Cornerstone

The concept of clean label is the beating heart of everything Sweet Earth does, from the way it sustainably sources ingredients used to formulate its foods, to the adorably animated Conscious by Choice Eco-Clock on its website—giving consumers statistics on how much energy and greenhouse gas the company has saved; how many pigs, chickens and cows have been spared; and how many miles weren't driven during the production of its products. Its core



The company has produced over 3.5 million pounds of plant-based proteins from its California kitchens.

mission is threefold: to honor and sustain the land, to cultivate a curious mind and palate, and to sustain a healthy body.

"Clean label is one of the fundamental building blocks of the Sweet Earth brand and is an essential driver of our growth," Swette explained. "In addition to taking our consumers on a culinary adventure with every meal, we promise a preservative-free, hormone-free, sustainable product every time. Over the years, we've produced over 3.5 million pounds of plant-based proteins right here in our California kitchens, replacing the environmental footprint of animal-based proteins, as seen on our website's Eco-Clock."



67 vegan and vegetarian products across 10 product categories including burritos, artisan bowls, breakfast sandwiches, empanadas, veggie burgers and fresh salad kits.



“In addition to taking our consumers on a culinary adventure with every meal, we promise a preservative-free, hormone-free, sustainable product every time.

— Kelly Swette, CEO and co-founder, Sweet Earth Foods

Swette maintained the Sweet Earth team has its finger on the pulse of the ingredient market: sourcing organic broccoli and the highest-quality quinoa to everything in between; sourcing local; and producing all plant-based proteins in-house at its 40,000-square-foot facility, to better ensure consistency in quality and cost.

“We buy smart; we don’t compromise on quality; and we do it all in-house,” she said. “Our entrepreneurial spirit and passion for the finished product has helped us overcome many sourcing roadblocks, but the single most important element is that we treat every player in our supply chain with respect.”

Sweet Earth products feature Non-GMO Project Verified certification and are made with organic ingredient certification from California Certified Organic Farmers (CCOF), a nonprofit organization that adheres to USDA National Organic Program (NOP) standards and advances organic agriculture through advocacy and education. “We believe these certifications are an essential part of our sustainability story and a signal to consumers that Sweet Earth is a brand they can trust,” Swette commented. “We manage our supply chain through strong relationships with our suppliers and clear communication of where our business is heading.”

What’s more, the company maintains great supplier relationships with many of the farms surrounding its production facility in Moss Landing. The localized approach to ingredient sourcing is paying dividends: Swette reported not only is it helping Sweet Earth grow by leaps and bounds, so have the businesses of many of its key partners.

Uber Palatable Plant Protein

For die-hard carnivores, the adoption of a plant-based diet can feel like a daunting trek into new and unfamiliar territory. They know there will be benefits, but when push comes to shove, can they honestly live without real bacon?

As part of its mission to bring flavor-forward, plant-based food to the masses, Sweet Earth created many plant-based meat alternative products including Planet Pepperoni™, Benevolent Bacon™ and Harmless Ham™ using wheat-based seitan as the core protein source. “Seitan features three times the protein of tofu and follows a recipe perfected by Buddhist monks in the 6th century,” Swette stated. “We also emphasize a wide range of plant-based ingredients like legumes, quinoa and chia seed that are nutritional powerhouses and add tremendous texture, color and aromas to our dishes.”



As it decides which new products to bring to life, the Sweet Earth team carefully and consistently strives to balance flavor-forward taste and texture with nutrient density. “We are constantly ideating around new products in our test kitchen that start from this belief,” she said. “For instance, frozen pizza usually calls to mind cardboard crusts and processed meats. We believe that pizza can be the perfect one-pan meal, and that was our goal throughout the development process.

“Now you can feel good about eating our pizzas and serving them to your family, knowing each is a good source of protein and fiber. We call it ‘pizza enlightenment.’”

Paying It Forward

Sweet Earth isn’t just keen on sustainably sourced and responsibly produced food, it’s also concerned about improving food production.

“Understanding the systems behind our food is critical to reducing the industry’s environmental impact while ensuring healthy food is accessible to every person,” Swette said, noting Sweet Earth has been financially active in education and sustainability for many years, which includes establishing the Swette Center for Environmental Science at Arizona State University (ASU) in 2002.

The company’s recent sale to Nestlé (under which the Swettes will remain independent with support from Nestlé USA’s Food Division) also generated funding to help establish the Swette Center for Sustainable Food Systems, also at ASU. “The center’s aim is to tackle food systems from a holistic standpoint—that means studying supply chain, nutrition, and environmental and agricultural science in a bigger way,” she said, adding they’ve also established the Swette Family Scholarship Program to provide financial support to students from agricultural farm-working and food-working families.

“Both the progress at ASU and our company are advancing the work of research, policy and education to understand and provide solutions that will move us to a more sustainable food system that will have the benefit of increasing the lifespan and the quality of peoples’ lives,” she concluded. 🌱



Food For Thought

A fruit and vegetable-rich, plant-based diet is linked to numerous health benefits and positively contributes to environmental sustainability.

Frozen food sections at traditional grocery stores have been frowned upon; more brands should bring healthy, delicious products to these aisles.

Treat every player within a supply chain with respect, build strong relationships with suppliers and communicate clearly about all aspects of business.



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