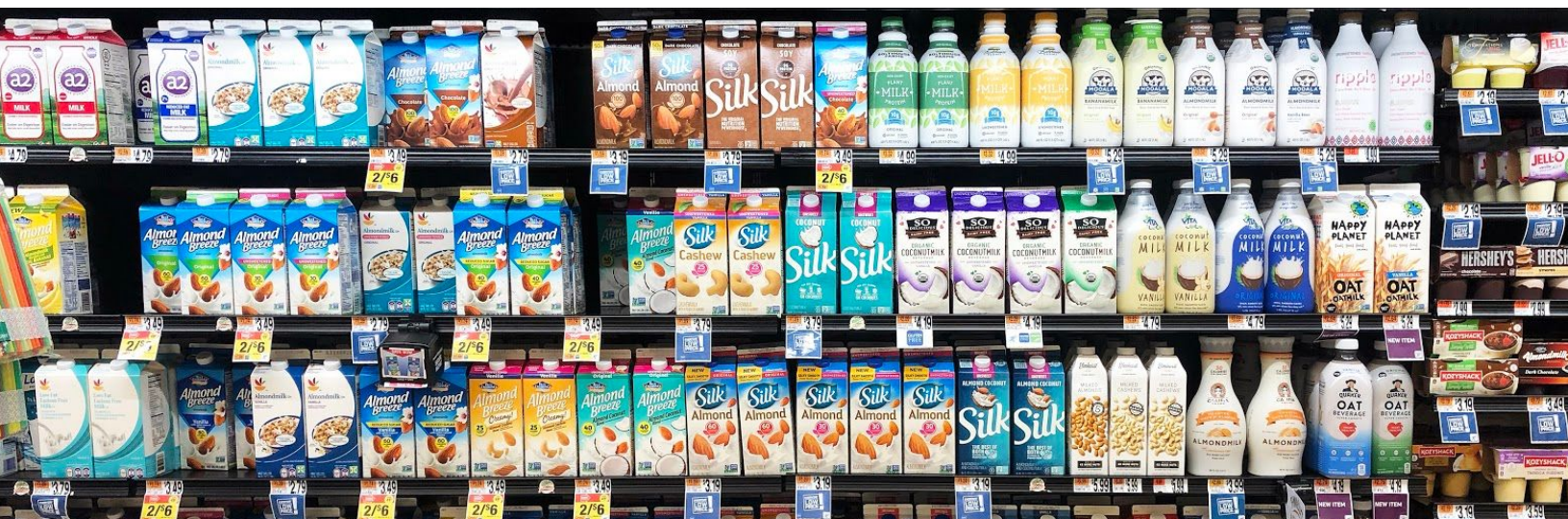




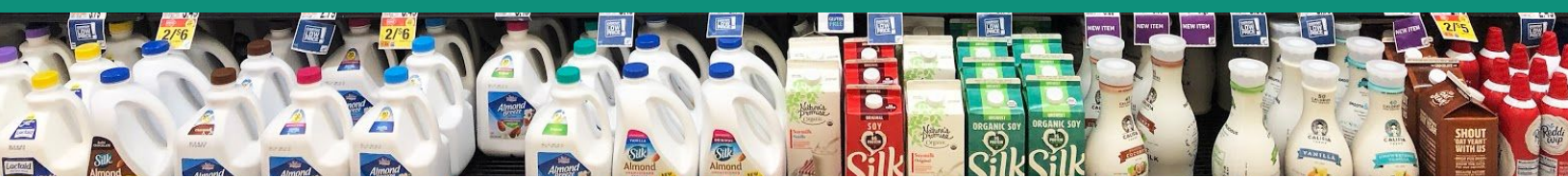
# Good Food Retail Report

Benchmarking the top U.S. retailers on  
plant-based sales strategies

May 2020



VISIT US AT [GFI.ORG](https://www.gfi.org)



---

## Table of Contents

<b>Introduction</b>	<b>4</b>
The Business Case for Plant-Based Meat, Eggs, and Dairy	4
Defining “Plant-Based Food”	6
Retailers Included in the Report	6
How to Read the Report	7
<b>Overall Results: Conventional Grocery Retailers</b>	<b>8</b>
<b>Market Overview</b>	<b>9</b>
<b>Product Assortment</b>	<b>10</b>
Star Ratings: Product Assortment	10
Product Assortment Criteria	10
By the Numbers: Product Assortment	11
Awards	12
Best Overall Product Assortment	12
Most Products On Shelf	13
Best Private-Label Assortment	14
Best In-Store Foodservice Offerings	15
Winning at Plant-Based: Product Assortment	16
Key Takeaways	16
Starting with the Shelf	16
How should retailers prioritize plant-based categories?	16
Developing Compelling Private-Label Products	17
How should retailers prioritize private-label development?	17
Household Penetration of Plant-Based Categories: Year Ending October 2019	17
Prepared Foods: Making Plant-Based More Convenient	20
<b>Merchandising</b>	<b>21</b>
Star Ratings: Merchandising	21
Merchandising Criteria	21
By the Numbers: Merchandising	22
Awards	23
Best Overall Merchandising	23
Best Signage	24
Best Signage	25
Winning at Plant-Based: Merchandising	26
Key Takeaways	26



---

Shifting Toward Integrated and Integrated-Segregated Merchandising	26
Leveraging In-Store Signage	29
<b>Marketing</b>	<b>31</b>
<b>Star Ratings: Marketing</b>	<b>31</b>
Marketing Criteria	31
<b>By the Numbers: Marketing</b>	<b>32</b>
<b>Awards</b>	<b>33</b>
Best Retailer-Published Magazine	33
Best Social Media Content	34
<b>Winning at Plant-Based: Marketing</b>	<b>36</b>
Key Takeaways	36
Increasing Plant-Based Purchasing	36
Primary Motivators for Plant-Based Purchasing Decisions	36
Promoting Across Channels and Engaging in Shopper Marketing	37
<b>Conclusion</b>	<b>40</b>
<b>Key Recommendations</b>	<b>41</b>
Product Assortment	41
Merchandising	41
Marketing	41
<b>Appendix</b>	<b>42</b>
<b>Methodology Overview</b>	<b>42</b>
<b>About GFI</b>	<b>43</b>
<b>Marketing &amp; Strategy</b>	<b>43</b>
<b>Technical Expertise &amp; Guidance</b>	<b>43</b>
<b>Retail Team</b>	<b>44</b>
<b>Acknowledgments</b>	<b>44</b>

---

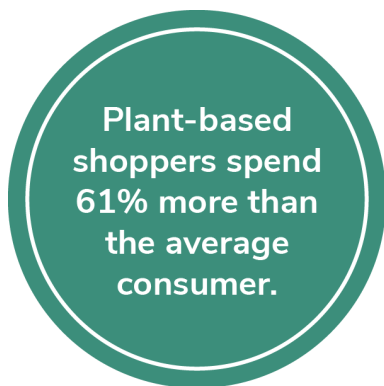
## Introduction

In 2019, more than 700 new plant-based meat, egg, and dairy products hit the shelves at U.S. retailers as consumer demand continued to increase.<sup>1</sup>

Plant-based is one of the biggest trends in food and a key driver of sales growth in retail. Plant-based sales are growing 14 times faster than total food sales.<sup>2</sup> With plant-based shoppers spending 61% more than the average shopper,<sup>3</sup> retailers should provide an array of great-tasting plant-based products to keep these valuable customers while attracting new customers looking for a broad product selection.

The Good Food Retail Report, compiled by [The Good Food Institute](#), evaluates the top 15 U.S. food retailers<sup>4</sup> according to product assortment, as well as merchandising and marketing of plant-based meat, egg, and dairy products. The food retailers represented in this report compose more than 50% of the market share for measured U.S. retail food sales. Thus, this benchmarking establishes the retailers that are leading the way in plant-based foods, a category with growing implications for consumer eating habits, shifting supply chains, human health, environmental sustainability, and—importantly—the bottom line.

## The Business Case for Plant-Based Meat, Eggs, and Dairy



Thirty-nine percent of Americans are actively trying to incorporate more plant-based foods into their diets.<sup>5</sup> Meanwhile, 60% of consumers want to reduce their meat consumption.<sup>6</sup> A new segment has emerged—flexitarians, defined as those who try to eat less conventional meat but don't restrict themselves to a vegetarian or vegan diet. Flexitarians represent about one-third of the U.S. population. Millennials and Gen Z are over-indexed on purchase intent—42% and 46%, respectively,

---

<sup>1</sup> SPINSscan Natural and Specialty Gourmet (proprietary), SPINSscan Conventional Multi Outlet (powered by IRI), 52 weeks ending 12-29-19.

<sup>2</sup> IRI point of sale analysis, MULOC, 52 weeks ending 10-06-19, CAGR for CY 2015–CY 2018.

<sup>3</sup> SPINSscan plant-based total basket size in basket dollars per trip, total U.S., all outlets, 52 weeks ending 12-31-17.

<sup>4</sup> The super 50. (2018). *Progressive Grocer*. Retrieved from <https://progressivegrocer.com/top-50-grocers-2018-ranked?from=gate>

<sup>5</sup> Shoup, M. E. (2017, June). Innovative plant-based food options outperform traditional staples, Nielsen says. Food Navigator-USA. Retrieved from <https://www.foodnavigator-usa.com/Article/2018/06/20/Innovative-plant-based-food-options-outperform-traditional-staples-Nielsen-finds>

<sup>6</sup> Aramark. (2019, August). Plant-based Beyond Meat® products help Aramark drive climate-healthy culinary innovation. Retrieved from <https://www.aramark.com/about-us/news/aramark-general/beyond-meat-products-help-aramark-drive-innovation>

---

compared with 34% of the general population.<sup>7</sup> For many consumers, a main consideration driving this shift is health—49% of consumers perceive plant-based foods as healthier.<sup>8</sup>

Who is the plant-based consumer? In some ways, plant-based purchasers are the everyday consumer. Traditional meat eaters, for example, make up the vast majority of plant-based meat purchasers.

**“93% of the consumers in conventional grocery stores that are buying a Beyond Meat product are also putting animal meat in their basket.”**

—CNBC, IN A DISCUSSION WITH ETHAN BROWN, FOUNDER OF BEYOND MEAT



Plant-based food investments in 2019 amounted to more than \$690 million.

No retailer wants to lose plant-based consumers to competitors with better plant-based assortments—37% of these consumers occupy households with incomes greater than \$100,000.<sup>9</sup> On the supply side, meat companies are taking notice and participating. The top six U.S. meat companies, including Tyson, JBS, Cargill, and Conagra, are all active in plant-based foods. On the investment front, plant-based meat, egg, and dairy companies drew more than \$690 million in investments in 2019 alone, and more than 340 unique investors were active in the space.<sup>10</sup>

In sum, large consumer segments—traditional meat eaters and flexitarians—are seeking more plant-based products. This report, based on consumer and market research, evaluates and recommends strategies designed to appeal to these groups. By strengthening product assortments and developing compelling private-label lines, retailers can take advantage of the rapid democratization of plant-based foods and ensure that they have products positioned for every consumer segment. By merchandising plant-based meat, eggs, and dairy alongside their conventional counterparts, retailers can make plant-based options more accessible to the many shoppers who purchase both plant-based and conventional meat. Similarly, by shifting language from restrictive terms, such as “vegan” or “vegetarian,” to terms demonstrated to improve purchase intent, such as “plant-based” and “plant-protein,” retailers can better appeal to a

---

<sup>7</sup> The Food Industry Association & The Foundation for Meat & Poultry Education & Research. (2019). *Power of meat*. Arlington, VA: The Food Industry Association.

<sup>8</sup> Datassential. (2018). Inspiration from the garden. *FoodBytes*, 51, 4. Retrieved from <https://c.datassential.com/eml/TrendSpotting/Datassential%20-%20FoodBytes%20-%20March%202018.pdf>

<sup>9</sup> Nielsen custom defined dataset, household panel, total U.S., 52 weeks ending 07-28-18.

<sup>10</sup> GFI 2020 custom PitchBook analysis of plant-based (including fungi-based) food companies located or selling in the United States, excluding IPOs, mergers and acquisitions, and buyouts or LBOs.



---

wide range of customers with diverse reasons for purchasing plant-based meat, eggs, and dairy.

## Defining “Plant-Based Food”

For the purposes of this report, the term “plant-based food” refers to products that are direct replacements for animal-based products, including meat (which includes seafood), eggs, and dairy, as well as meals that contain animal ingredient replacements. Inherently plant-based foods that do not have an animal-based counterpart, such as chickpeas and kale, are not included. Please note that, although fungi and algae are not biologically classified as plants, fungi- and algae-based products are included for these purposes.

### Product Examples



Plant-Based Meat



Plant-Based Milk



Plant-Based Egg



Plant-Based Meal



Plant-Based Cheese



Plant-Based Spread

---

## Retailers Included in the Report

This report focuses on the top 15 U.S. food retailers according to 2018 fiscal revenue.<sup>11</sup> Ratings are included for a select subset of banners with 100+ locations. Parent companies are not evaluated in aggregate. To provide comparisons among banners in consistent competitive sets, we have not included findings for club warehouse (e.g., Costco Wholesale, Sam's Club, BJ's Wholesale Club) and small format (e.g., Trader Joe's, Aldi). However, we will release them in future reports focused on these formats.

---

<sup>11</sup> The super 50. (2018). *Progressive Grocer*. Retrieved from <https://progressivegrocer.com/top-50-grocers-2018-ranked?from=gate>

---

## How to Read the Report

This retail report provides overall ratings for each banner listed. The report is further divided into product assortment, merchandising, and marketing sections, which include the following:

- **Ratings:** assessments on a five-star scale.
- **By the numbers:** key performance statistics.
- **Awards:** recognition of retailers with leading strategies for growing plant-based food sales.
- **Winning at plant-based:** best practices, including case studies, for increasing plant-based food sales.

## Overall Results: Conventional Grocery Retailers

Banner	Overall Score	Product Assortment	Merchandising	Marketing
Whole Foods	★★★★★	★★★★★	★★★★★	★★★★★
King Soopers	★★★★★	★★★★★	★★★★★	★★★★★
Ralphs	★★★★★	★★★★★	★★★★★	★★★★★
Giant Food	★★★★★	★★★★★	★★★★★	★★★★★
ShopRite	★★★★★	★★★	★★★★★	★★★★★
Wegmans	★★★★★	★★★★★	★★★	★★★
Target	★★★★★	★★★	★★★★★	★★★★★
Fred Meyer	★★★★★	★★★★★	★★	★★★★★
Publix	★★★	★★★★★	★★	★★★★★
Kroger	★★★	★★★	★★★	★★★★★
Safeway	★★★	★★★	★★★★★	★★★★★
Hy-Vee	★★★	★★★★★	★	★★★
Stop & Shop	★★★	★★★	★★★	★★★★★
Harris Teeter	★★★	★★★	★★★	★★★
H-E-B	★★★	★★★	★★★	★★★
Albertsons	★★★	★★★	★★★★★	★
Meijer	★★★	★★★	★★★★★	★
Winn-Dixie	★★★	★★	★★★	★★★★★
Vons	★★★	★★★	★★★	★
Food Lion	★★	★	★★★	★★★
BI-LO	★★	★	★★	★★★★★
Walmart	★★	★★	★★★	★★
GIANT Food Stores	★★	★	★★	★★★

In the case of ties, banners are organized by the unpublished raw scores.



---

## Market Overview

### **Plant-based foods are driving retail growth.**

In the United States, retail dollar sales of plant-based foods that directly replace animal products grew 11% in 2019 to \$5 billion, a 29% increase from 2017. Last year total U.S. retail food dollar sales grew just 2% and only 4% from 2017.

Across the store, plant-based food sales are growing rapidly, while sales of many conventional animal products stagnate or decline. Retailers that embrace the shift toward plant-based eating can attract plant-based shoppers with higher basket rings; bring more consumers into these premium-priced categories, thus growing total store sales; and establish a valuable point of differentiation.

**Plant-based meat is a \$939 million category.** More than 208 million units of plant-based meat were sold in 2019, and plant-based meat accounts for 2% of all dollar sales for retail packaged meat and approximately 1% of the entire meat category, including random weight. The plant-based meat category today is reminiscent of the plant-based milk category in its early stages of rapid growth—plant-based milk now accounts for 14% of all dollar sales for retail milk. The plant-based meat category could reach market share parity with plant-based milk at a 13-point gain of total retail meat market share (including random weight). This opportunity is worth almost \$12 billion, according to Nielsen's total meat category value of \$95 billion.

### **Plant-based milk continues to grow as it becomes a household staple.**

Plant-based milk sales are worth \$2 billion, having grown 5% last year. A full 41% of U.S. households purchase plant-based milk.<sup>12</sup> Cow's milk sales were stagnant in 2019, growing only 0.1% after a 4% decline in the previous year.

### **About the Data**

The data summarized here represents retail sales of plant-based foods that directly replace animal products, including meat, seafood, eggs, and dairy, as well as meals that contain animal ingredient replacements. This data is based on custom-GFI plant-based categories that were created by refining standard SPINS categories. Due to the custom nature of these categories, the presented data does not align with standard SPINS categories. This data covers the grocery marketplace and was obtained over the 52-week and 104-week periods ending December 29, 2019, from the SPINSScan Natural, Specialty Gourmet, and Conventional Multi Outlet (powered by IRI) channels.

### **Full Market Research**

For a more in-depth look at GFI's plant-based market research from SPINS, visit [gfi.org/marketresearch](https://gfi.org/marketresearch).

### **State of the Industry Reports**

For more background on alternative protein players, investments, and opportunities, visit [gfi.org/industry](https://gfi.org/industry).

---

<sup>12</sup> IRI panel, total store view, all outlets, 52 weeks ending 12-01-19.

## Product Assortment

### Star Ratings: Product Assortment

Banner	Product Assortment
Whole Foods	★★★★★
King Soopers	★★★★★
Wegmans	★★★★★
Ralphs	★★★★★
Fred Meyer	★★★★★
Hy-Vee	★★★★★
Giant Food	★★★★★
Publix	★★★★★
ShopRite	★★★★
Target	★★★★
Kroger	★★★★
Safeway	★★★★
Harris Teeter	★★★★
Albertsons	★★★★
H-E-B	★★★★
Stop & Shop	★★★★
Vons	★★★★
Meijer	★★★★
Winn-Dixie	★★★
Walmart	★★★
Food Lion	★
GIANT Food Stores	★
BI-LO	★

### Product Assortment Criteria

Product assortment ratings are based on the following:

- Plant-based options on shelf in each of the 11 evaluated product categories (see categories below).
- Private-label plant-based offerings in each of the 11 categories.
- Plant-based protein options in the fresh deli, prepared foods, salad bar, hot bar, and grab-and-go sections.

### Product Categories

Product assortment evaluation consists of **11 distinct categories** of direct replacements for animal products. The weight of each category is based on the total market value of the corresponding animal-based category. The evaluation thus prioritizes categories with the greatest opportunity to increase plant-based product share. Refrigerated plant-based meat, for example, is weighted at more than 40%, given the relatively large size of the fresh meat category. Due to this weighting, the most total products doesn't necessarily translate into the highest product assortment score. Categories are as follows:

- Refrigerated plant-based meat.
- Frozen plant-based meat.
- Refrigerated plant-based milk.
- Plant-based cheese.
- Plant-based yogurt (including kefir).
- Plant-based butter.
- Plant-based ice cream and frozen novelty.
- Plant-based creamers.
- Plant-based eggs.
- Plant-based spreads (e.g., mayo, cream cheese, sour cream, whipped cream).
- Frozen plant-based meals.

In the case of ties, banners are organized by the unpublished raw scores. For more information on criteria, see the [methodology overview](#) in the appendix.

---

## By the Numbers: Product Assortment

**500+**

maximum total SKUs

The retailer with the most total products had more than 500 plant-based meat, egg, and dairy options.

**100+**

meat products

Leading retailers had 100+ plant-based meat products across the refrigerated and frozen sections.

**80%**

10+ refrigerated  
meat SKUs

More than 80% of retailers offered at least 10 different refrigerated plant-based meat SKUs.

**70+**

milk SKUs

Retailers as a whole excel at providing plant-based milk products. Leading assortments boast 70–90 SKUs.

**50%**

egg products

Approximately 50% of retailers carry a plant-based egg product.

**110**

ice cream and frozen  
novelty SKUs

Ringling in at an average 110 products per store location, ice cream and frozen novelty won out over frozen meat and milk for the most plant-based products in a given category from a single retailer.





### Best Overall Product Assortment

Awardee: **Whole Foods Market**

Whole Foods Market carries hundreds of plant-based meat, egg, and dairy products, including at least one product from each category. With an extensive plant-based private-label collection, Whole Foods also demonstrates their investment in product innovation while creating customer loyalty. Finally, Whole Foods offers an impressive array of options in the prepared foods and foodservice sections, improving customer access to convenient plant-based foods and meals.

“For 40 years, Whole Foods Market has been the destination for vegetarians and vegans to shop. We take pride in providing our customers with an abundant and innovative offering of plant-based products, including novel proteins, made with wholesome ingredients.”

—DAN EPLEY, VP OF GROCERY AT WHOLE FOODS MARKET



## Most Products On Shelf

### Most Products On Shelf

Awardee: **Wegmans**

With more than 500 plant-based meat, egg, and dairy products on shelf, Wegmans is the leader in providing abundant choice to customers. These products span all plant-based categories (including an exciting portfolio of private-label products).



## Best Private-Label Assortment

Awardee: **King Soopers**

King Soopers offers an excellent variety of more than 35 private-label items across the majority of categories. It includes Kroger's Simple Truth plant-based line that includes dairy and meal prep products, as well as the recently launched Emerge plant-based refrigerated meat line. By increasing their plant-based portfolio, King Soopers makes it easier for customers to build plant-based versions of the dishes they know and love.

**“As more of our customers explore and embrace a flexitarian lifestyle, Simple Truth Emerge is a fresh innovation that provides a flavorful meat alternative that cooks comparably [to meat].”**

**—GIL PHIPPS, KROGER'S VICE PRESIDENT OF OUR BRANDS**





## Best In-Store Foodservice Offerings

Awardee: **Whole Foods Market**

The rapid growth of plant-based foods owes to across-the-store approaches to drive consumer trial. Whole Foods leads in designing menu items for each daypart across prepared foods, grab-and-go, salad bar, hot bar, and foodservice sections, allowing customers to sample plant-based options from meat to eggs to cheese, probably increasing purchase at shelf. Whole Foods has also leveraged branded partnerships to build awareness and launch innovative foodservice products, such as JUST egg breakfast sandwiches with Lightlife bacon, Gardein sausage, and Good Planet cheese, on their breakfast menu.

**“Whole Foods Market has long been a champion of plant-based eating. We feature a wide variety of alternative protein options across our store, including high-quality, chef-inspired vegan and vegetarian options in our Prepared Foods Department, which includes our Chef’s Case, salad bar, hot bar, and a variety of convenient grab-and-go items.”**

—JEFF TURNAS, SVP OF GLOBAL CULINARY PROCUREMENT & OPERATIONS AT WHOLE FOODS MARKET

---

## Winning at Plant-Based: Product Assortment

### Key Takeaways

- ✓ Stock a wide assortment of plant-based meat, egg, and dairy products across categories.
- ✓ Develop compelling private-label products, prioritized by the size, growth, and household penetration of their respective plant-based categories.
- ✓ Give customers a chance to sample professionally prepared plant-based products by adding them to foodservice offerings and prepared foods.

### Starting with the Shelf

If it's not on the shelf, merchandising and marketing won't matter. A successful plant-based strategy begins with stocking a wide assortment of plant-based meat, egg, and dairy products across categories and expanding these offerings as new products are introduced and popularized.



With almost 5,000 different plant-based meat, egg, and dairy products sold in the United States in 2019,<sup>13</sup> retailers have a wide range of options for inclusion in their plant-based product portfolios. We recommend a three-prong strategy in product assortment—stocking a variety and an abundance of plant-based foods across all product categories, offering a robust portfolio of private-label plant-based products, and featuring alternative proteins in the prepared foods and foodservice sections.

Retailers looking for a baseline number of products in each category should consider the example of plant-based meat. Customers look for different product types (e.g., plant-based beef, chicken, pork, fish) in various formats (e.g., grounds, sausages, patties, nuggets, strips, meatballs, shreds), flavors, and unit sizes. Retailers should bear this in mind when deciding which products to stock.

### How should retailers prioritize plant-based categories?

GFI's plant-based food market data commissioned from SPINS reveals [last year's dollar sales in each plant-based category](#). Also relevant are the size and

---

<sup>13</sup> SPINSScan Natural and Specialty Gourmet (proprietary), SPINSScan Conventional Multi Outlet (powered by IRI), 52 weeks ending 12-29-19.

growth of [animal-based categories](#)—including those that have yet to see extensive market disruption from plant-based products.

## Developing Compelling Private-Label Products

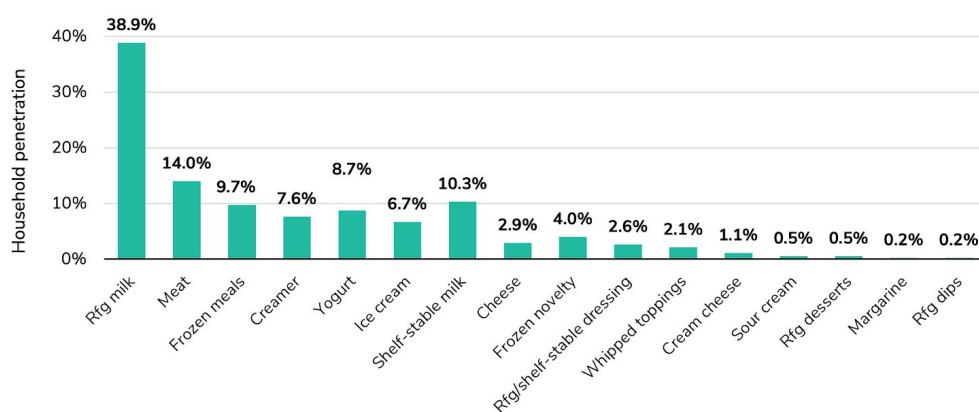
In plant-based meat, milk, and ice cream, if “private-label” were a brand, it would rank among the top 10 by dollar sales.

Private-label product sales are on the rise. Overall, private-label products accounted for \$143 billion in sales last year, with 3.7% year-on-year growth and a four-year CAGR of 2.5%, according to Nielsen sales data.<sup>14</sup> By ensuring that private-label brands include plant-based meat, egg, and dairy products, retailers can capitalize on the mainstreaming of flexitarianism. In fact, in the more developed plant-based categories, such as meat, milk, and ice cream, if “private-label” were a brand, it would already rank among the top 10 by dollar sales.

## How should retailers prioritize private-label development?

Retailers should prioritize by the size, growth, and household penetration of the plant-based category. Milk is the biggest opportunity, but other plant-based categories, such as meat and meals, are also generating significant dollar sales, growing quickly, and gaining household penetration.

## Household Penetration of Plant-Based Categories: Year Ending October 2019



Source: IRI panel, all outlets, 52 weeks ending 11-03-19, NBD aligned

<sup>14</sup> Nielsen Retail Measurement Services, inclusive of Nielsen’s total food view, total U.S., all outlets combined (xAOC), 52 weeks ending 05-25-19.

- **Plant-based meat.** Retailers who don't have at least one private-label plant-based meat product on shelf should consider developing one. Using comparable conventional meat as the baseline will help ensure the product satisfies the largest market—traditional meat eaters. Retailers with existing plant-based meat lines should continue to take advantage of the rising popularity of plant-based beef, chicken, pork, and more by expanding their lines to include a variety of product types and formats.
- **Plant-based meals.** Although plant-based meals are one of the largest plant-based categories by dollar sales (behind plant-based milk and meat), the vast majority of retailers don't have a single private-label plant-based meal on shelf. According to SPINS, in 2017 frozen entrees labeled vegan grew 15% compared with frozen entrees overall at 4%.<sup>15</sup>
- **Plant-based cheese.** Very few retailers offer private-label plant-based cheese, despite the availability of branded products in multiple types and formats, including block, sliced, and shredded.
- **Plant-based yogurt.** Yogurt is also a large white space. Many stores stock 40–60 plant-based branded products, and next to none offer private-label plant-based yogurt.
- **Other plant-based dairy.** Very few retailers have private-label plant-based creamers, spreads, and butter.



### White Space: Private-Label Yogurt Case Study: Almond-Milk Yogurt at Wegmans

The plant-based yogurt category rang in at \$283 million in sales last year, according to GFI's SPINS market research.<sup>16</sup> This category represents an enormous opportunity for private-label launches. The Food You Feel Good About line at Wegmans features almond milk yogurt in a variety of flavors and unit sizes from 24 oz. to single serve.

<sup>15</sup> SPINSscan Natural and Specialty Gourmet (proprietary), SPINSscan Conventional Multi Outlet + Convenience (powered by IRI), 52 weeks ending 12-31-17.

---

## Making Plant-Based Accessible

### Case Study: Private Label at The Kroger Co.

The launch of Kroger's Simple Truth® Plant Based collection, announced at the 2019 Good Food Conference, is a direct response to increasing demand for plant-based food from mainstream consumers. The platform adds a new Emerge line of pea-based fresh meatless burger patties and grinds, as well as plant-based cookie dough, pasta sauces, sausages, deli slices, dips, and other items. With products like Bolognese sauce, turkey-style deli slices, and cream cheese that directly replace animal-based items in a customer's cart, this line appeals to the consumer's desire for familiar, easy-to-prepare products.

Kroger's plant-based private-label launch is a milestone in the retail adoption of plant-based foods. And with plant-based shoppers spending 61% more than the average shopper,<sup>1</sup> now is never too soon to get them in the door.



**“The collection will include easy-to-identify packaging featuring a distinct [plant-based] icon that will help customers locate the items as they navigate through store aisles or when shopping online.”**

—GIL PHIPPS, KROGER'S VICE PRESIDENT OF OUR BRANDS, AT THE 2019 GOOD FOOD CONFERENCE





Left: The Impossible Burger in the foodservice lineup at H-E-B in Texas. Right: Prepared food signage for plant-based options at Whole Foods.

## Prepared Foods: Making Plant-Based More Convenient

How can retailers improve plant-based protein offerings in the deli, prepared foods, salad bar, hot bar, restaurant, and refrigerated grab-and-go sections? While a number of retailers offer impressive on-shelf product assortments, many lack plant-based protein options in prepared foods or in-store foodservice. This leaves open a significant opportunity for leadership. Professionally preparing these products gives customers a taste of a dish they could prepare at home using items on the retailer's shelves, potentially driving in-store sales.

“Partnering with retailers such as Whole Foods to bring JUST Egg to their customers across the store is a great opportunity for the retailer and for us. The original JUST Egg is currently available in the egg section, and our new frozen JUST Egg will be on shelf in the frozen breakfast section, positioned for breakfast sandwiches and other easy-to-prepare meals, starting in April. JUST Egg is also available on the hot bars and menu boards in scrambled dishes and sandwiches. Prepared food offerings are effective complements to on-shelf product launches and give consumers looking for a healthy, sustainable protein another convenient and delicious option.”

—MATT RILEY, SVP GLOBAL PARTNERSHIPS, JUST

## Merchandising

### Star Ratings: Merchandising

Banner	Merchandising
Giant Food	★★★★★
Target	★★★★★
Albertsons	★★★★★
Meijer	★★★★★
Whole Foods	★★★★★
King Soopers	★★★★★
Ralphs	★★★★★
ShopRite	★★★★★
Safeway	★★★★★
Vons	★★★★
H-E-B	★★★★
Winn-Dixie	★★★★
Food Lion	★★★★
Wegmans	★★★★
Stop & Shop	★★★★
Walmart	★★★★
Kroger	★★★★
Harris Teeter	★★★★
Publix	★★★
BI-LO	★★★
Fred Meyer	★★★
GIANT Food Stores	★★★
Hy-Vee	★

### Merchandising Criteria

Merchandising ratings are based on the following:

- Location of plant-based sets across each category, with preference for sets integrated or integrated-segregated with the conventional product sets to make products more accessible to the mainstream shopper.
- Presence of aisle signage highlighting plant-based meat.
- Use of “plant-based” or “plant-protein” instead of “vegan” or “vegetarian” to appeal to a wider range of customers.

### Product Categories

The merchandising evaluation deploys the same 11 categories as the product assortment evaluation. The weight of each category is based on the total market value of the corresponding animal-based category. Thus, the evaluation prioritizes categories with the greatest opportunity to increase plant-based product share. Refrigerated plant-based meat, for example, is weighted at more than 40%, given the large size of the fresh meat category compared with the size of other categories. Categories are as follows:

- Refrigerated plant-based meat.
- Frozen plant-based meat.
- Refrigerated plant-based milk.
- Plant-based cheese.
- Plant-based yogurt (including kefir).
- Plant-based butter.
- Plant-based ice cream and frozen novelty.
- Plant-based creamers.
- Plant-based eggs.
- Plant-based spreads (e.g., mayo, cream cheese, sour cream, whipped cream).
- Frozen plant-based meals.

In the case of ties, banners are organized by the unpublished raw scores. For more information, see the [methodology overview](#) in the appendix.



---

## By the Numbers: Merchandising

**65%**

meat aisle presence

65% of retailers merchandised at least one refrigerated plant-based meat product in the meat aisle.

**91%**

multiple integrated categories

91% of retailers extended an integrated or integrated-segregated merchandising strategy to multiple categories beyond plant-based milk, improving accessibility for the mainstream shopper.

**57%**

aisle signage for plant-based meat

57% of retailers featured aisle signage for plant-based refrigerated or frozen meat products.

**31%**

preferred language

Of that group, approximately 31% deployed inclusive language, such as “plant-based” or “plant-powered,” instead of limiting language, such as “vegan” or “vegetarian.”

**57%**

plant-based shelf tags

57% of retailers used shelf tags or icons to identify plant-based products in at least one category.

---

## Awards



### Best Overall Merchandising

Awardee: **Giant Food**

Giant Food's plant-based strategy stands out for its integrated or integrated-segregated merchandising of product sets with corresponding animal-based sets, as well as prominent aisle signage and shelf tags that use inclusive "plant-based" language.



## Best Signage

Awardee: **Giant Food** (tie)

Giant Food's signage successfully orients the consumer at the aisle level, with overhead aisle signage promoting plant-based sets, as well as at the product level, with a shelf tag system. Giant Food also uses recommended inclusive language, such as "plant-based" and "plant-powered," instead of restrictive terms, such as "vegan" and "vegetarian."



## Best Signage

Awardee: **King Soopers** (tie)

King Soopers effectively presents plant-based refrigerated and frozen meat sets with aisle signage and communicates plant-based at a product level with a shelf tag system. Notably, King Soopers uses recommended inclusive language, such as “plant-based” and “plant-powered,” instead of restrictive terms, such as “vegan” and “vegetarian.”

**“Kroger anticipates interest in plant-based products to continue to grow in 2020, with the category being one of the key drivers of our natural and organic sales.”**

—JOE GRIESHABER, KROGER’S SVP OF MERCHANDISING

---

## Winning at Plant-Based: Merchandising

### Key Takeaways

- ✓ Merchandise plant-based sets integrated or integrated-segregated with the conventional set to make products more accessible to the mainstream shopper.
- ✓ Leverage “plant-based” aisle signage and shelf tags to communicate store location and product features to customers.
- ✓ Showcase plant-based categories in endcaps and special displays, especially alongside analogous animal products.

### Shifting Toward Integrated and Integrated-Segregated Merchandising

The segregated sets that have dominated plant-based merchandising for years make shopping easy for committed plant-based consumers, who compose only a small fraction of total consumers. In fact, only about 5% of the U.S. population is vegetarian, according to a 2018 Gallup poll.<sup>16</sup> Thus, most consumers ignore these segregated sets or aren’t aware of the many plant-based options that they might otherwise purchase.



The plant-based meat section at Heinen’s, a retailer with stores in Northeast Ohio and the greater Chicago area, is located in the refrigerated meat aisle and clearly delineated with “plant-based” signage.

---

<sup>16</sup> Hrynowski, Z. (2019, September). What percentage of Americans are vegetarian? Gallup News. Retrieved from <https://news.gallup.com/poll/267074/percentage-americans-vegetarian.aspx>



---

An integrated or integrated-segregated merchandising strategy affords several benefits to consumers new to plant-based products:

- Plant-based products are easily found in the store sections these consumers already shop.
- Animal-based and plant-based products can be easily compared.
- Consumers have the opportunity to better appreciate the additional value for the premium.

Integrated merchandising strategies are also supported by SPINS retail sales data. Over 2018 and 2019, dollar sales of refrigerated plant-based meat—increasingly shelved adjacent to conventional meat in the meat aisle—grew 125%, while dollar sales of frozen plant-based meat (which is generally segregated) grew 15%.<sup>17</sup>



### Merchandising for All Spotlight: Plant-Based Milk

The refrigerated milk case is a prime example of the shifting merchandising strategy for plant-based foods. About 15 years ago, consumers had to search the aisles to find shelf-stable selections of plant-based milk. Today, consumers can find plant-based milk right in the milk aisle alongside conventional cow's milk. This merchandising change helped plant-based milk increase from 1% share of the total milk category to 14% today.\* Now, 89.5% of plant-based milk sales are from the refrigerated milk case.\*\*

\* SPINSscan Natural and Specialty Gourmet (proprietary), SPINSscan Conventional Multi Outlet (powered by IRI), 104 weeks ending 04-21-19.

\*\* Nielsen custom defined dataset, xAOC + WFM, 52 weeks ending 08-11-18.

---

<sup>17</sup> SPINSscan Natural and Specialty Gourmet (proprietary), SPINSscan Conventional Multi Outlet (powered by IRI), 52 weeks ending 12-29-19.

## Plant-Based Butcher Section

### Case Study: Unpackaged Plant-Based Meat at Bristol Farms

With refrigerated plant-based meat more popular than ever, retailers are exploring new ways to provide customers with plant-based versions of the products they love. Bristol Farms launched a series of products in the butcher section of their Yorba Linda, California, location. According to Rick Stidham, Bristol Farms' meat director, the decision was driven by an analysis that "the plant-based category presented the largest upside potential." Products in this series are clearly marked by "plant-based" signage and include breakfast sausage, chicken patties, taco mix, meatloaf, stuffed cabbage, chorizo-stuffed potatoes, and a Mediterranean patty.

Stidham says that these products constitute the industry standard of 1%–2% of Bristol Farms' business in the category. "There's been phenomenal growth partially because it's a new category, but we also believe the presentation has made it more accessible to customers who normally wouldn't have considered plant-based options." With this move, Bristol Farms has established itself as an innovator in recontextualizing the meat aisle as a center-of-plate protein aisle. "We definitely see plant-based as a category that will continue to inspire us to create new offerings and one in which the demand will continue to grow," said Stidham.



"The decision to put the items in the [meat] case enabled us to not only show the versatility of plant-based proteins; it made it highly visible. This gave us a niche that only a full-service butcher shop could provide—it was those conversations across the counter that drove sales and inspired our shoppers to look at plant-based proteins in a new light. It also allowed us to offer value-added recipes and let the customer feel like the chef."

"Initially, the new line appealed mainly to our flexitarian customers, but we also heard from many shoppers with vegan or vegetarian loved ones, and they appreciated the convenience of purchasing these fresh items at the meat counter."

—RICK STIDHAM, BRISTOL FARMS  
MEAT DIRECTOR



---

## Leveraging In-Store Signage

Effective **aisle signage** makes plant-based products easier for customers to locate. If this signage uses inclusive language, such as “plant-based,” “plant-powered,” and “plant-protein,” in place of terms such as “meat alternatives,” “vegan,” or “vegetarian,” it will appeal to a wider range of customers and not limit the consumer base to vegans and vegetarians.

Key findings from a [Mindlab/GFI study](#) into implicit perceptions of the plant-based category<sup>18</sup> show that consumers are more likely to purchase plant-based products when descriptors such as “plant-protein” or “plant-based” are used. Notably, “plant” terms paired with “protein” are most likely to increase purchase intent. All “plant” terms perform better than restrictive language, such as “vegan,” “vegetarian,” and free-from terms.

Plant-protein	56%	Meatless	42%
Plant-based protein	56%	Meat-free	42%
Plant-based	53%	Meat substitute	38%
Dairy-free	50%	Vegan	35%
Meat alternative	45%	Beefless	34%
Animal-free	44%	Chickenless	31%
Vegetarian	44%	Porkless	31%

For each of these terms, results show the **percentage of times** participants responded that reading the term would **influence them to purchase a plant-based product**.

Similarly, **consistent shelf tags** highlighting plant-based products make these products easier for customers to identify in store. This is especially the case when products are merchandised in integrated or integrated-segregated sets. As with aisle signage, if shelf tags use inclusive “plant” language, they show the larger pool of flexitarians and traditional meat eaters that these products are for them too.

---

<sup>18</sup> Parry, J., & Mitchell, R. (2019). Assessing the general population’s implicit perceptions of the plant-based food category. Brighton, UK: Mindlab International. Retrieved from <https://go.gfi.org/l/667193/2019-09-19/dq67x>



**Plant-Based**



**Vegan**



Left: Shelf tags at Target identify plant-based and vegan foods with memorable icons (Image source: Target). Right: Aisle signage at a King Soopers location calls attention to a refrigerated plant-based meat section in an integrated-segregated set in the beef section.

Finally, **endcaps** and **special displays** draw attention to new plant-based product types and seasonal items, especially when these are merchandised next to similar animal-based products. Creating a display that includes burger patties and bratwurst for grilling season? Place animal-based and plant-based burgers and links side by side so customers can conveniently see all of their options and buy for everyone at their cookout in one stop.

## Marketing

### Star Ratings: Marketing

Banner	Marketing
Whole Foods	★★★★★
ShopRite	★★★★★
Stop & Shop	★★★★★
King Soopers	★★★★★
Ralphs	★★★★★
Kroger	★★★★★
Target	★★★★★
BI-LO	★★★★★
Giant Food	★★★★★
Fred Meyer	★★★★★
Publix	★★★★★
Winn-Dixie	★★★★★
Safeway	★★★★★
Harris Teeter	★★★★
GIANT Food Stores	★★★★
Wegmans	★★★★
Hy-Vee	★★★★
H-E-B	★★★★
Food Lion	★★★★
Walmart	★★★
Vons	★
Albertsons	★
Meijer	★

#### Marketing Criteria

Marketing ratings are based on the following:

- Cross-category plant-based thematic promotions in marketing and promotional materials.
- Placement of plant-based options alongside conventional animal products in marketing and promotions.
- “Plant-based” or “plant-protein” terminology in marketing and promotions instead of “vegan” or “vegetarian” to appeal to a wider audience.
- A wellness or nutrition program that promotes the health benefits of plant-based foods.

In the case of ties, banners are organized by the unpublished raw scores. For more information on criteria, see the [methodology overview](#) in the appendix.

---

## By the Numbers: Marketing

78%

plant-based  
promotions

78% of retailers had at least one plant-based category promotion or marketing event.

39%

plant-based alongside  
legacy products

39% of retailers featured plant-based products next to animal-based products in a promotion.

57%

in-store displays

57% of retailers showcased plant-based products in endcaps, displays, or product sampling.

65%

preferred language

65% of retailers used “plant-based” or similar plant-forward terms in place of “vegan” or “vegetarian” to appeal to a wider audience.

57%

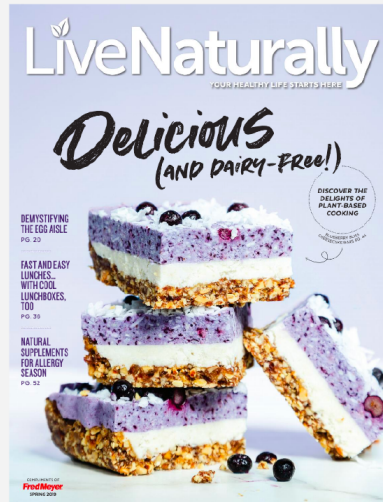
plant-based  
promotions in  
wellness programs

57% of retailers included plant-based products in their wellness and nutrition materials.

---

## Awards

### Best Retailer-Published Magazine



### Best Retailer-Published Magazine

Awardee: **Live Naturally, The Kroger Company**

Live Naturally magazine (along with its sister publication, Optimum Wellness magazine, for Colorado) showcases plant-based products as viable alternatives to their animal-based counterparts and promotes them via recipes, nutrition programs, and wellness guidance. The magazine superbly demonstrates that plant-based products are for anyone.



## Best Social Media Content

Awardee: **Whole Foods Market**

Whole Foods Market's social media channels regularly feature plant-based foods. With more than 50 original social media pieces throughout 2019, the company shows that plant-based products fit a broad spectrum of lifestyles.

Exemplary content includes building vegan cheese boards, Whole Foods' portfolio of private-label plant-based products, cart and basket photos featuring plant-based foods alongside animal-based foods, original plant-based recipes, and spotlights on plant-based influencers.

**“Focusing on plant-based foods is one of the many ways Whole Foods Market listens to and connects with its customers through social media. Highlighting plant-based recipes, ingredients, and nutrition content showcases plant-based products and ensures that new and innovative products are easily discoverable by our customers.”**

—HEIDI NOBLE STEWART, EXECUTIVE LEADER CONSUMER PR AND SOCIAL & INFLUENCER MARKETING AT WHOLE FOODS MARKET

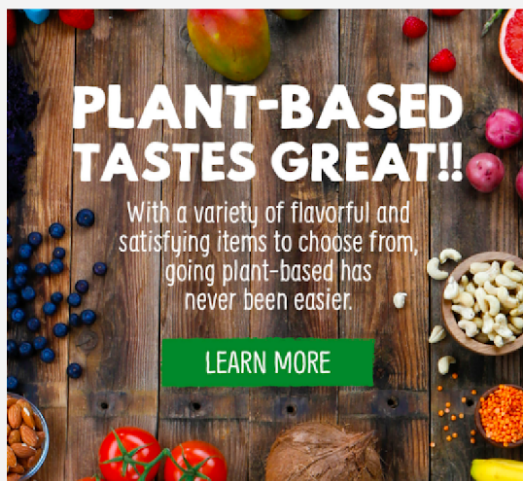
## A Multibrand Cross-Channel Marketing Campaign

### Case Study: Sprouts Farmers Market

Sprouts' Plant-Based Tastes Great marketing campaign, which made a splash for plant-based products from a wide range of brands, used digital, print, and in-store channels, including the following:

- Email promotion to the Sprouts mailing list.
- Banner featured prominently in the Sprouts weekly circular.
- Clickable promotions on the Sprouts website.
- In-store signage emphasizing the savings on brands that opted in.
- "Plant-based" shelf tags highlighting the sale prices.

Notably, the Sprouts campaign emphasized taste, the number one purchasing consideration for consumers, and the satisfying meals that are easy to prepare with the variety of plant-based products available in stores. Additionally, GFI's original research on marketing plant-based foods supports the use of terms such as "indulgent" and "irresistible" to describe plant-based products.\*



\* SPINSScan Natural and Specialty Gourmet (proprietary), SPINSScan Conventional Multi Outlet (powered by IRI), 104 weeks ending 04-21-19.



---

## Winning at Plant-Based: Marketing

### Key Takeaways

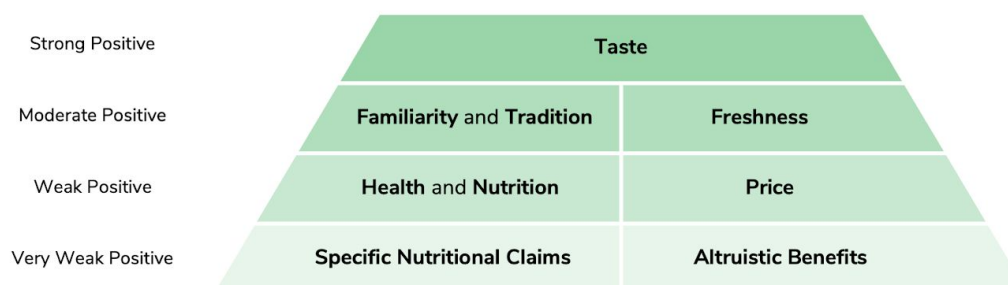
- ✔ Market around taste by upping the indulgence factor and featuring tasty plant-based options as alternatives to animal-based options.
- ✔ Appeal to more customers by using inclusive terms, such as “plant-based” and “plant-protein,” instead of restrictive terms, such as “vegan” or “vegetarian.”
- ✔ Leverage existing wellness and nutrition programs, as well as seasonal campaigns, and offer an in-store demo program to increase category exposure.

The plant-based market is thriving because traditional meat eaters and flexitarians are embracing plant-based products. Plant-based marketing strategies that appeal to these consumer segments will dramatically increase household penetration and drive category sales.

### Increasing Plant-Based Purchasing

Above all, **market around taste**. Taste is the most important food attribute.<sup>19</sup> Amp up the indulgence in the product description.

#### Primary Motivators for Plant-Based Purchasing Decisions



A purchasing study of implicit perceptions of the plant-based category found that taste is the number one motivator of purchase intent, followed by familiarity and tradition, freshness, and other motivators.<sup>20</sup>

---

<sup>19</sup> Mintel. (2018). *Plant-based proteins—U.S.* London, UK: Mintel.

<sup>20</sup> Parry, J., & Mitchell, R. (2019). *Assessing the general population's implicit perceptions of the plant-based food category*. Brighton, UK: Mindlab International. Retrieved from <https://go.gfi.org/l/667193/2019-09-19/dq67x>

---

Feature tasty **plant-based options alongside animal-based options**. Half of consumers aged 18–34 want to swap animal-based proteins for plant-based proteins.<sup>21</sup> Great examples are a print promotion on grilling for July 4th and a digital campaign on quick-prep family meals to show consumers that retailers offer the full range of desired protein options.



Online features from Fred Meyer demonstrate a taste-forward approach to plant-based advertising for a series of plant-based meat and dairy products (Image source: Fred Meyer).

**Say “plant-based” or “plant-protein.”** GFI consumer research shows that vegan labeling does not appeal to a predominantly omnivore consumer base.<sup>22</sup> Labeling should focus on what a product offers, not what it lacks (e.g., “meatless”). People more often state an intention to increase consumption of plant-based foods than an intention to reduce consumption of conventional meat. Descriptive language that pairs “plant” with “protein” (e.g., “plant-protein,” “plant-based protein”) performs best on purchase intent. Such language also generates positive associations with products, especially the attributes tasty, satisfying, and healthy. Consumers often associate vegan foods with deprivation.<sup>23</sup>

### **Promoting Across Channels and Engaging in Shopper Marketing**

The shopping experience can be leveraged to meet the needs and desires of the customer. Success in plant-based shopper marketing starts with the fundamentals of attracting and educating customers, removing barriers to trial (e.g., by sampling products), and demonstrating that plant-based products win on price, taste, and convenience.

---

<sup>21</sup> Technomic. (2019). 2019 Center of the plate: Seafood & vegetarian consumer trend report. Chicago: Technomic.

<sup>22</sup> Parry, J., & Szejda, K. (2019). *How to drive plant-based food purchasing: Key findings from a Mindlab study into implicit perceptions of the plant-based category*. Washington: The Good Food Institute.

<sup>23</sup> Mattson. (2017). *Meteoric rise in flexitarian eating and how HPP can play a role*. Slides presented at the 2017 HPP Summit, Atlanta, GA.

---

Several retailers offer **wellness and nutrition programs** that easily integrate plant-based products and recipes, which appeals to the many customers opting for plant-based proteins for health reasons.



**Portobello Mushroom Burger**



**Portobello and Black Beans Burger**



**Broccoli and Cauliflower Quinoa Burger**



**Cajun Bean Burger**



**Chipotle Cauliflower Quinoa Burger**



**Spinach Burgers**

*H-E-B's online collection of plant-based burger recipes for grilling season*  
(Image source: H-E-B)

Including plant-based as a thematic event in cross-category promotions makes it easy for brands to participate in **seasonal or ongoing plant-based promotions**.

Consumers are more likely to buy what they've tasted. Done right, **in-store demos** drive purchasing by showing consumers that plant-based products taste great. Make sure this option is available to manufacturers.

# Making Plant-Based Products Accessible

## Case Study: Live Naturally Magazine at The Kroger Co.

Live Naturally is a lifestyle magazine that offers plant-forward recipes, coupons, product spotlights, and articles from nutritionists and dietitians.

Live Naturally is free at Kroger, Fred Meyer, Fry's, QFC, Ralphs, and Smith's stores across the nation. Its sister publication, Optimum Wellness, delivers similar content at King Soopers and City Market in Colorado.



Live Naturally offers an abundance of plant-forward content:

- Highlights on plant-based meat, dairy, and meals, as well as the health benefits of plant-based foods.
- Plant-based yogurt, milk, and frozen desserts presented alongside conventional dairy products as viable alternatives.
- Budget-friendly plant-based eating.
- Explainers on plant-based proteins, such as jackfruit, to increase familiarity.
- Nutrition experts dispelling misconceptions about the health impacts of plant-based foods.

---

## Conclusion

U.S. retail sales of plant-based foods reached \$5 billion and grew 11% in 2019—five times faster than overall food sales. Plant-based is clearly a pivotal component of product categories across the store. For example, U.S. retail dollar sales for plant-based meat are expected to hit \$1 billion in 2020 and grow by double digits each year thereafter.

To ensure that the needs of the full range of consumers are met, the first step for any retailer is to evaluate and scale up product assortment. This should include a wide portfolio of popular branded products, as well as private-label lines with various product types and formats. Broadline foodservice sales of plant-based meat grew 37% in 2019.<sup>24</sup> Showcasing professionally prepared plant-based products in foodservice and prepared foods sections will give customers a taste and potentially drive in-store sales.

The rise of plant-based milk over the past decade to 14% market share today<sup>25</sup> is attributed to product innovation and merchandising. In light of the critical importance of in-store placement to household penetration, as well as learnings from the rise of natural and organic products in conventional grocery stores, we strongly recommend integrated or integrated-segregated merchandising. Similarly, plant-based product sales benefit from clear aisle signage and shelf tags that appeal to the widest range of consumers through inclusive language. Finally, marketing around taste and leveraging social media channels bolster retail strategies by demonstrating how seamlessly plant-based meat, eggs, and dairy replace animal products and fit into a variety of lifestyles.

Plant-based milk is an entry point for many consumers into other plant-based categories. Thus, plant-based meat, eggs, and dairy are poised for rapid growth. Indeed, all signs point to a continued plant-based trend, as the majority of consumers, especially millennials and Gen Z, report a desire to increase their consumption of plant-based foods and reduce their consumption of conventional meat.<sup>26</sup> For retailers, the path forward is clear: cultivating a plant-based strategy to reap the rewards of a happy, healthy customer base while growing total store sales.

---

<sup>24</sup> NPD SupplyTrack, U.S. broadline foodservice distribution, 52 weeks ending December 2019, commissioned by GFI.




<sup>25</sup> SPINSscan Natural and Specialty Gourmet (proprietary), SPINSscan Conventional Multi Outlet (powered by IRI), 52 weeks ending 12-29-19.

<sup>26</sup> Ipsos update—October 2017. (2017, October 2). Ipsos.com. Retrieved from <https://www.ipsos.com/en-si/ipsos-update-october-2017>




---

## Key Recommendations




### Product Assortment

-  Stock a wide assortment of plant-based meat, egg, and dairy products across categories.
-  Develop compelling private-label products, prioritized by the size, growth, and household penetration of the plant-based category.
-  Add professionally prepared plant-based products to foodservice offerings and prepared foods to give customers a chance to sample.

### Merchandising

-  Use integrated or integrated-segregated merchandising to make plant-based products more accessible to the mainstream shopper.
-  Leverage “plant-based” aisle signage and shelf tags to communicate store location and product features.
-  Showcase plant-based products in endcaps and special displays, especially alongside analogous animal products.

### Marketing

-  Market around taste by upping the indulgence factor and featuring tasty plant-based options as alternatives to animal-based options.
-  Appeal to more customers by using inclusive language, such as “plant-based” and “plant-protein,” instead of restrictive language, such as “vegan” and “vegetarian.”
-  Offer in-store demos to increase category exposure and leverage seasonal campaigns and existing wellness and nutrition programs.

---

## Appendix

### Methodology Overview

We rated retailers using a tiered system to highlight excellence and opportunities in the areas of product assortment, merchandising, and marketing.

Area	% of Overall Score	Criteria
Product Assortment	60%	<ul style="list-style-type: none"><li>• Number of plant-based product SKUs by category</li><li>• Number of private-label plant-based products by category</li><li>• Number of plant-based prepared foods and foodservice options</li></ul>
Merchandising	25%	<ul style="list-style-type: none"><li>• Adjacency of plant-based and animal-based products</li><li>• Aisle signage and shelf tags</li></ul>
Marketing	15%	<ul style="list-style-type: none"><li>• Cross-category promotions across channels</li></ul>

We intend for the scoring system to reward retailers that offer a variety of plant-based products across categories and position them to appeal to mainstream customers. We collected the data through in-store audits (March 1, 2019–October 31, 2019) and online content (available January 1, 2019–January 31, 2020). GFI extended to all retailers the opportunity to validate the data; where they provided additional data, we updated the ratings accordingly.

#### Definition of “Plant-Based Food”

See [the introduction](#) for this report’s definition of “plant-based food.”

#### Retailers Included in the Report

See [the introduction](#) for a note on which retailers are included in the report.

For additional details on methodology criteria, please refer to the criteria call-out box alongside star ratings in each of the [product assortment](#), [merchandising](#), and [marketing](#) sections of the report.

Further questions about methodology can be directed to [emmai@gfi.org](mailto:emmai@gfi.org).



---

## About GFI

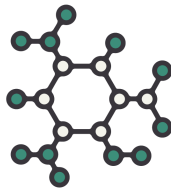
**The Good Food Institute is an international nonprofit building a sustainable, healthy, and just food system.** Our scientists, entrepreneurs, lawyers, and policy experts are harnessing the power of food innovation and markets to accelerate the transition of the world's food system to plant-based and cultivated meat, eggs, and dairy. Our no-cost services for manufacturers, retailers, foodservice companies, investors, entrepreneurs, and scientists advance a market that provides tasty, competitively priced, easily accessible plant-based products while helping secure a roadmap for cultivated product development and adoption.

---



### Marketing & Strategy

- Global and regional market overviews.
  - Syndicated retail sales data.
  - Industry mapping.
  - Primary consumer research.
  - Consumer trends and insights.
  - Innovation guidance.
  - Menu and merchandising strategy.
  - Product marketing and positioning.
- 



### Technical Expertise & Guidance

- Plant-based and cultivated technology.
  - Recombinant protein and synthetic biology.
  - Technical plan or research plan review.
  - Technical insights and exploration.
  - Research grant program.
  - Funding and investment opportunities.
-

---

## Retail Team



**Alison Rabschnuk**  
Director of Corporate  
Engagement



**Caroline Bushnell**  
Associate Director of  
Corporate Engagement



**Emma Ignaszewski**  
Corporate Engagement  
Strategist

## Acknowledgments

We'd like to express our sincere appreciation for the many volunteers who helped make this retail report possible, including Megan Edge, Nikki Jedlicka, Gabriel Borden, Rachel Cristol, Julie Ryan, Katelyn Anthony, and Cecelia Mercer. Additional thanks go out to Amanda Presgraves, Cathleen Loomis, and Briannah Wilson.

## Contact Us!

To request GFI's services or learn more about the retail report, contact our corporate engagement team at [corporate@gfi.org](mailto:corporate@gfi.org).