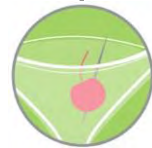


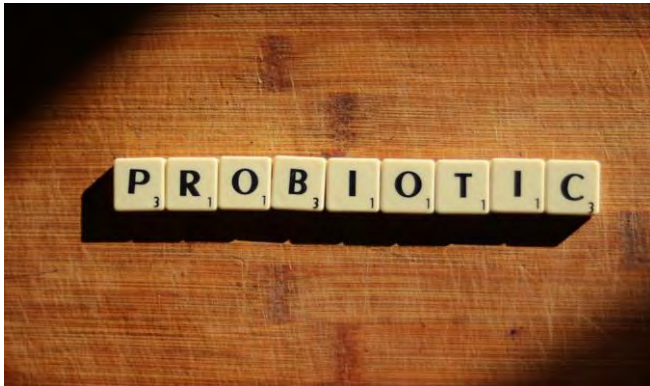
Lifestyle Trends Influencing Flavor & Fragrance Innovation

FLAVORS AND
fragrances
U.S.

September 28, 2021
Amy Marks-McGee



Agenda



VEGAN

PLANT
BASED



Lifestyle Diets

Vegetarian: A person who eats a non-animal based diet such as vegetables, fruits, grains, pulses, legumes, nuts, and seeds, instead of meat, poultry, or fish.

Vegan: A person who is a strict vegetarian who also does not eat eggs or any dairy products.

Flexitarian: A person who has a primarily vegetarian diet but occasionally eats meat, poultry, or fish.



“Vegan” “Plant-Based”

Food & beverage launches tracked with fruit & vegetable ingredients and a **plant-based claim** grew an average **+54%** (Global CAGR 2016-2020), according to Innova Market Insights

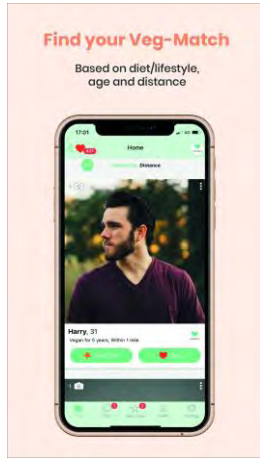
According to Technomic's Food & Beverage Takeaways, Ingredients that support plant-based diets continue to trend with **plant-based proteins +35%**

The **vegan food industry** is set to spike **450%** over the next decade from **\$29 billion** to **\$160 billion**, according to a Bloomberg report

Grubhub's mid-year report for 2021 showed diners continue to eat plant-based dishes. **Vegan orders** have risen by **17%**, **plant-based burgers** by **28%**, and general **vegetarian orders** by **55%**



“Vegan” Food Goes Mainstream



Vegan Beauty

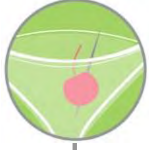
The **global vegan cosmetics** market grew at a **7% CAGR** between 2014-2019, according to the IMARC Group

The **vegan beauty industry** worldwide accounted for **\$15 billion** in 2020 and is expected to reach **\$20 billion** by 2027, according to Strategy R and Global Industry Analysts, Inc.

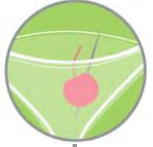
According to Spate, on average, there are **3.6K searches** for **vegan conditioner** in the U.S. every month, and interest has grown **65.3%** since last year



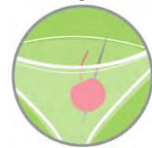
Vegan Beauty



Sustainable Plant-Based Materials



P R O B I O T I C



Prebiotics, Probiotics, Postbiotics

Prebiotics: dietary fiber that provides fuel or energy for the bacteria in the gut

Probiotics: live microorganisms (typically bacteria or yeast) that live in one's gut and are good for the digestive system

Postbiotics: the byproducts of probiotics



Prebiotics, Probiotics, Postbiotics

According to Innova Market Insights, **prebiotic health claims** saw an average annual growth of **+34%** (Global, CAGR 2016-2020)

+22% average annual growth in f&b tracked with fermented preparation method and **prebiotic ingredients** (Global, CAGR 2015-2019)

The global **Probiotics market** is estimated to be **\$61.1 billion** in 2021 and is projected to reach **\$91.1 billion** by 2026, at a CAGR of **8.3%**, according to MarketsandMarkets

Postbiotics have become the fastest growing area in terms of **gut health** related Google searches, with a nearly **1,300% increase** in the last two years, according to Lumina Intelligence



Probiotic Food & Beverage

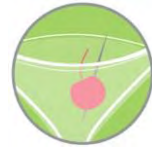


Probiotic Beauty

Personal care products that feature a **prebiotic** and / or **probiotic** claim have witnessed an average annual growth of **73%** over the past five years (Global, CAGR 2016-2020), according to Innova Market Insights



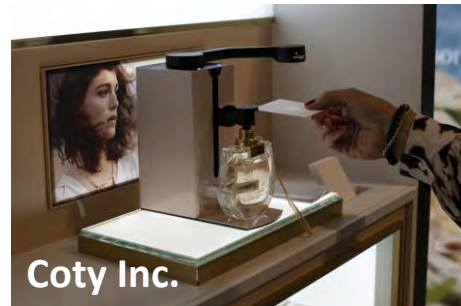
Technology



Flavor Tech



Fragrance Tech



scentmate
BY FIRMENICH



trendinate
Inspiration for Creation



thank you!

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Amy
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