

# 1010DATA™

July 2021

## ONLINE GROCERY

# CATEGORY *of the* YEAR

## PLANT-BASED FOODS SPOTLIGHT



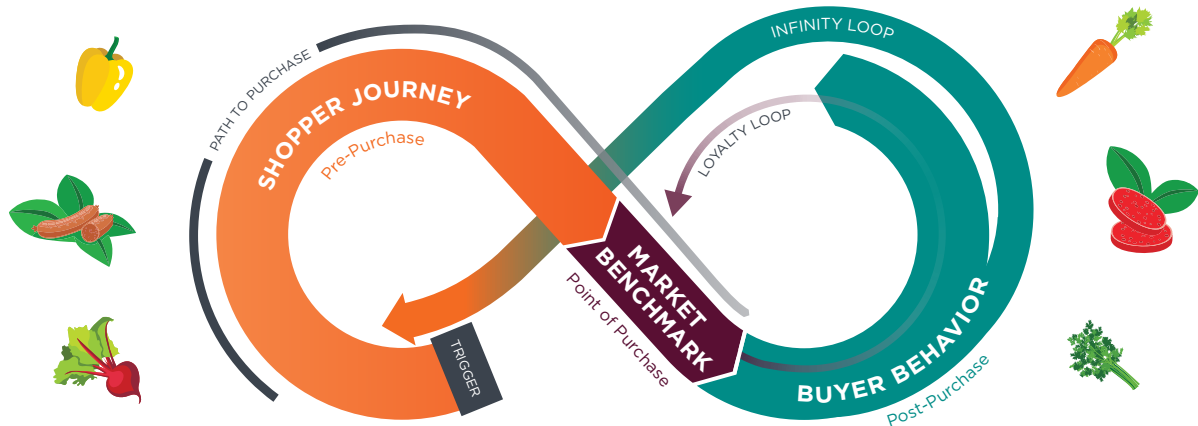
As noted within the 1010data [Health](#) & [Beauty](#) Spotlights, consumers took a closer look at health and lifestyle changes in a variety of different ways given the impact of the pandemic, and when it came to diet alterations, this was no exception. While all grocery categories experienced significant year-over-year growth online as noted within our State of Grocery report, Meat Substitutes was the top performing category within our panel, growing 199%. This Spotlight provides further insight to the online growth trends seen within this category throughout the 2020 pandemic.

# ANSWER PRESSING BUSINESS QUESTIONS

## Leveraging the 1010data eCommerce Suite

To conduct the Meat Substitutes category analysis, we used insights found within the various stages of the Consumer Online Decision Journey to understand how the activity within each phase informs a different part of the holistic online shopping experience. With this broadened view, you can significantly strengthen decision-making and drive better outcomes.

### CONSUMER ONLINE DECISION JOURNEY



Below are the core capabilities of the 1010data eCommerce Suite leveraged in part to generate the metrics for this Spotlight:



#### SHOPPER JOURNEY *Pre-Purchase*

- Search Insights** reveal which terms and keywords are driving sales for a given category
- Comparison Shopping** shows what brands, merchants and products are considered and purchased
- Conversion Rates** help identify features and attributes that reduce friction-to-purchase



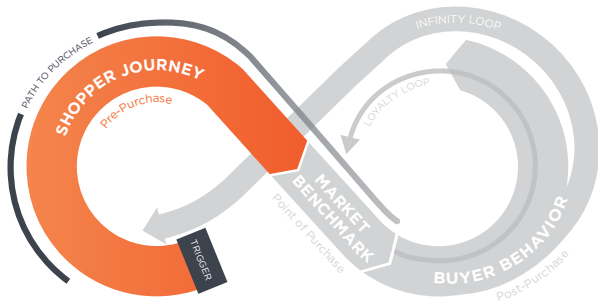
#### MARKET BENCHMARK *Point-of-Purchase*

- Site, Category & Brand Benchmarks** monitor performance across geographic and competitive lines
- Item-level Detail** presents assortment opportunities including variance by location
- Top Brands & Merchants** tracks sales and market share shifts of both established players and new entrants



#### BUYER BEHAVIOR *Post-Purchase*

- Online Share of Wallet** follows customer spending for both a targeted brand and its competitors
- New, Lost, Returning Customers** breaks out specific purchasing behavior and conversions to different products
- Basket Analysis** identifies connections between unique brands and the associated lift in total basket sales



# FROM TRIAL TO REPEAT

Shopper Journey: Uncovering the “Why” Behind Pre-Purchase Behaviors via Search Terminology

Growth in specific pre-purchase search terms indicated consumers’ increased interest in health-centric grocery categories with words like **‘Organic’ (163% growth)**, **‘Plant-Based’ (148% growth)**, **‘Gluten-Free’ (99% growth)**, and **‘Vegan’ (88% growth)** growing the most from 2019 to 2020.



**163%**  
Organic



**148%**  
Plant-Based



**99%**  
Gluten-Free

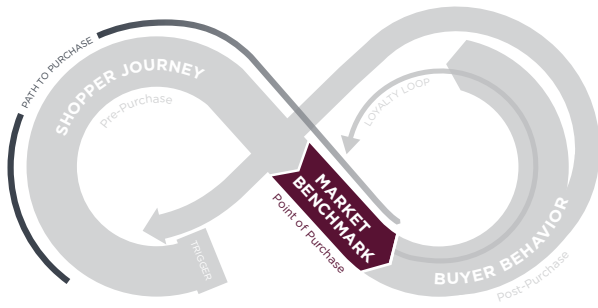


**88%**  
Vegan

Source: 1010data Market Intelligence - eCommerce Panel Data

Taking a closer look at meat substitutive related searches, brands like Gardein, Incogmeato, and Beyond Burger rose in popularity (comparing November 2020 – April 2021 to May 2020 – October 2020), while MorningStar remained stable, accounting for three of the top six search terms.

Search Terms	Rank	Previous Rank	Rank Change
vegan	1	1	0
Morning Star	2	2	0
Gardein	3	3	0
veggie burger	4	7	3
morningstar	5	8	3
Morningstar Farms	6	4	-2
vegetarian	7	12	5
Beyond Meat	8	10	2
tempeh	9	Fell Out	-
veggie burgers	10	9	-1
Beyond Burger	11	13	2
vegan sausage	12	14	2
vegan meat	13	5	-8
Incogmeato	14	6	-8



# WHERE DID CONSUMERS SHOP AND WHAT BRANDS DID THEY BUY?

Market Benchmark: Assessing the Competitive Landscape and Discovering Key Drivers Within Meat Substitutes Purchases

## ONLINE SALES FOR MEAT SUBSTITUTES

### Top Performing Retail Channels

#1 instacart

42%

The top sales for retailers via Instacart were:

.....18%

.....16%

.....10%

#2 Walmart

25%

Pickup & Delivery



#3 amazon

14%

Sales through Amazon were split by:

.....7%

.....3%

.....3%

.....1%

### Top Performing Brands

#1 MorningStar FARMs

30%

YoY Brand Share Point Change:

**-2.95**

YoY Sales Growth:

**94%**

#2 BEYOND MEAT

19%

YoY Brand Share Point Change:

**-1.33**

YoY Sales Growth:

**100%**

#3 gardein

16%

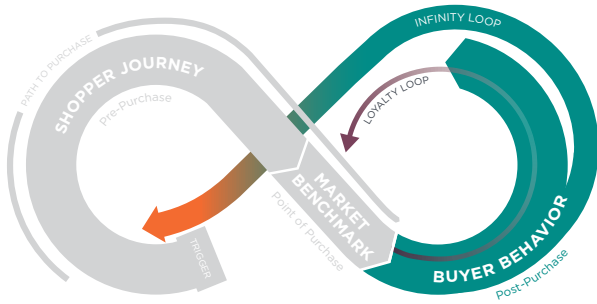
YoY Brand Share Point Change:

**.62**

YoY Sales Growth:

**124%**

Source: 1010data Market Intelligence eCommerce Panel Year-Over-Year Growth from July 2020 through June 2021



# WHERE DID LOST CUSTOMERS GO?

Buyer Behavior: Understanding Post-Purchase Consumer Behaviors Increases Retention Rates

	Buyer Share		YoY Growth	YoY Share Point Change
	New	Retained		
2019	11%	89%	<b>93.9%</b>	<b>-2.95</b>
2020	11%	89%		
<b>Lost Customers - 7%</b>				
<b>What are they buying now?</b>	Beyond Meat - 36%			
	Gardein - 26%			
	Impossible Foods - 8%			
	Sweet Earth - 7%			
	Boca - 4%			
Lightlife - 4%				



## Down At the Farm

While MorningStar Farms remains the market share leader with sales growing 93.9% year-over-year, they lost almost 3 share points and also lost 7% of their customer base year-over-year. Additionally, the largest portion of their lost customers (36%) switched to primary competitor, Beyond Meat.

	Buyer Share		YoY Growth	YoY Share Point Change
	New	Retained		
2019	54%	46%	<b>100.2%</b>	<b>-1.33</b>
2020	31%	69%		
<b>Lost Customers - 16%</b>				
<b>What are they buying now?</b>	MorningStar Farms - 40%			
	Gardein - 20%			
	Impossible Foods - 9%			
	Quorn - 5%			
	Boca - 4%			
	Raised & Rooted - 3%			



## To Growth & Beyond

In 2020, Beyond Meat was able to retain 69% of new customers (up from 46% the prior year) with just over a 100% increase in sales and a reduction in lost customers to 16%. In spite of this, they still lost 1.33 share points and, interestingly, 40% of their lost customer base shifted or returned to MorningStar.

## HOW CAN WE HELP YOU STAY AHEAD OF SHIFTING, ONLINE CONSUMER TRENDS?

The statistics in this Plant-Based Foods Spotlight were generated by the 1010data eCommerce Suite, which offers access to our timely data updates across the broadest category coverage in the marketplace. Companies leverage our data intelligence solutions to better understand digital shopping behaviors and monitor brand performance within today's online consumer journey from the path-to-purchase and beyond.

Contact [info@1010data.com](mailto:info@1010data.com) for more information.

### eCommerce Data

Although 1010data utilizes multiple panels that track millions of panelists, 1010data is projecting up to the total U.S. population. Panel-based projections are not intended to perfectly correlate to actual sales on an absolute dollar sales basis. The strength of 1010data's eCommerce data lies in share performance and trends over time.

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