



PLANT BASED FOODS
INSTITUTE

2022 IMPACT REPORT



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A MESSAGE FROM OUR CEO

What a year.

From supermarket shelves to the halls of government, 2022 was significant for PBFA, PBFI, and the broader plant-based foods industry—and thanks to the inspiring tenacity, dedication, and innovation of our incredible member community and the PBFA/I teams, I ended the year feeling more heartened and optimistic than ever before about the healthier, more equitable, and more sustainable future we're building together.

2022 saw our PBFA membership continue to grow, diversify, and become more engaged. Whether you were showcasing your cutting-edge products at Plant Based World Expo, connecting with one another via our brand new Member Portal and chat community, lending your unique perspective to our recently-launched Membership Committee, or swinging by one of our virtual knowledge-building events, you turned out this year—and we couldn't be more grateful for your collaboration and partnership as we work to further expand and optimize member benefits and experience. Led by our freshly-restructured and incredibly capable Membership team, 2023 is poised to be a year of further growth, powered by and in service of our dynamic and passionate member community.

This year was also highly eventful in the world of policy, where PBFA continued to engage strategically at the state and federal levels to combat unfairly burdensome labeling laws, advance the plant-based foods industry, and educate policymakers about the many benefits of plant-based foods for people and the planet. Alongside mission-aligned partners and allies, we engaged directly with government agencies and the White House to move the needle on regulatory and nutrition policy, and we took steps to help increase the presence of plant-based foods in schools. 2023 promises to be one of the biggest and most impactful years for plant-based policy yet, and our team—in close collaboration with our member community and our allies—stands ready to seize these critical opportunities for change.

And if that wasn't enough, I was absolutely floored by the incredible achievements of our Marketplace Development team and our members, who, together, continued to pave the way for plant-based foods in the worlds of retail and food service. Whether we were telling the remarkable story of plant-based via our annual retail sales data report—which illuminated the inspiring growth that has powered plant-based market value to an all-time high of \$7.4 billion—forging connections between our members and retailers or food service operators, or offering our community even more access and opportunity within these dynamic sectors, our team made it happen in 2022, and I couldn't be more excited about what's to come.

And finally, 2022 saw the official launch of the Plant Based Foods Institute, PBFA's sister nonprofit organization with a broad mandate to drive change towards a more plant-based, regenerative, and equitable food system. Domestically and abroad, the impact of PBFI is already being felt: This year saw the launch and incredible success of our Domestic Sourcing Initiative, which initiated robust pilot partnerships between plant-based companies and local farmers to create more sustainable supply networks; and it saw activity ramp up in the International Plant-Based Foods Working Group, where we have joined forces with like-minded associations and organizations from across the world to advance plant-based foods globally.

Significant, indeed! My sincerest and most whole-hearted thanks go out to our cherished member community, our Board, our partners and allies, and our dedicated staff who made 2022 a year for the books—and who will make 2023 the biggest year yet for the PBFA, PBFI, and our industry. With the combined power of our collective, our shared vision of a better food future is closer than ever to being realized. I can't wait to see all that we will continue to achieve, together.

With gratitude,

Rachel Dreskin

CEO, Plant Based Foods Association
& Plant Based Foods Institute





PLANT BASED FOODS ASSOCIATION

MEMBERSHIP

TOTAL MEMBERS:
338

157
COMPANY MEMBERS

123
AFFILIATES & INVESTORS

58
INGREDIENT SUPPLIERS

Our member community continues to grow, diversify, and become even more engaged.

In 2022, PBFA's member community welcomed a wide range of new plant-based food companies, affiliate members, investors, and ingredient suppliers into its ranks, exemplifying the unparalleled diversity and innovation of the plant-based foods industry.

Building foundation:

To bolster and expand our support for our members and achieve the ambitious goals mapped for the months to come, PBFA brought on our first ever Vice President of Membership, Ro Conder, to oversee the member experience and drive continued growth. Ro brings 18 years of experience on the executive teams of high-profile nonprofits to PBFA, where she has initiated a departmental restructuring that will enable the team to work even more closely with the community, tailor the member experience more effectively, and facilitate sharing of industry expertise. The Membership team is energized for what's to come, and remains dedicated to harnessing the power of PBFA's program areas to curate the most informative and engaging opportunities and resources that provide our members the insights they need to succeed.



Fostering community:

In 2022, the Membership team launched two critical new platforms to enhance and streamline the member experience. Most notably, our new [Member Portal](#) offers members a one-stop-shop to conveniently access resources, discounts, event registrations, webinar recordings, account information, community news and updates, and much, much more. And to ensure members have a convenient meeting place to interact, we launched a Slack-based member-to-member chat group, [PBFA Connects](#), that makes it easy for our community to network, stay up-to-date on the latest news and opportunities, and share information, resources, and insights in support of one another. Together, these platforms are adding tremendous value to the member experience and improving efficiency for the PBFA team.



Growing and diversifying member programming:

In 2022, we expanded the breadth of our member events and resources, designing and facilitating a wide range of webinars, expert discussions, and in-person gatherings. Our Membership team put special focus on enhancing our virtual events calendar to meet members where they are, hosting dynamic, informative [Member Solutions Calls](#) covering topics like the impact of inflation on plant-based shoppers, our annual retail sales data, e-commerce trends and solutions, tactics for entering the world of school food service, regenerative agriculture and domestic sourcing, and more. In addition, we held our very first [Pitch Perfect](#) event in November, in which five members of our community were given the chance to hone their all-important five-minute elevator pitch in front of a live audience and receive immediate feedback from a panel of expert investors.



MEMBERSHIP

Empowering leaders:

In June, PBFA launched our new Membership Committee, led by our members and established with a mission to enrich our community. Chaired by PBFA Board Member **Bill Glaser**, Co-Founder & CEO of Outstanding Foods, the committee plays an essential role in guiding our efforts to better serve and support our diverse, cutting-edge member community. Committee members will help PBFA shape our ever-expanding suite of member benefits, engage our community, and support recruitment efforts.



Celebrating plant-based success at Plant Based World Expo:

The PBFA member community was out in force at this year's Plant Based World Expo in New York City, showcasing the incredible growth, diversity, and innovation our collective industry has to offer.

The PBFA team was thrilled to welcome so many of our members at our **Member Appreciation Happy Hour**, which featured remarks from PBFA's CEO **Rachel Dreskin** and an exciting panel discussion featuring **Andrea Zweig Wagner**, Director of Brand Management at Peapod Digital Labs, a part of global grocery retailer Ahold Delhaize. This year's show also saw the debut of the **PBFA Recharge Room**, a space for our members to take a break from the expo floor, grab refreshments, plug in, and unwind. Many members of the PBFA staff, Board, and community joined fellow industry experts on dynamic educational panels covering a wide range of topics, including retail and food service; plant-based policy priorities; sustainability and regenerative agriculture; diversity, equity, and inclusion in the plant-based space; and product innovation. We were grateful to see so many of our members in person, hear from them firsthand about their future plans, and discuss ways PBFA can further support their growth.

POLICY

2022 was a year of huge strides for PBFA's policy agenda: We were active in federal and state legislative and regulatory efforts, the Domestic Sourcing Initiative kicked off in earnest, we built strong relationships with aligned groups and partners, and we saw our international role become increasingly pivotal and prominent.

This expansion of our policy work on behalf of the plant-based foods industry was powered by the addition of PBFA Policy Associate Christian Flinn and PBFI Policy Associate Renee Nickelson to our Policy team, both of whom devote their considerable talents and expertise to advancing the interests of the plant-based foods industry and our collective vision of a more sustainable, plant-based food system. In 2023, we look forward to adding another team member, who will lead our increasing international policy work. We value the partnership of our PBFA members in driving all of these important efforts forward over the past year, and in the year to come.



Federal labeling:

The Food and Drug Administration (FDA) published "*Labeling of Plant-Based Milk Alternatives and Voluntary Nutrient Statements; Draft Guidance for Industry*," and in response, PBFA took an active role in educating FDA and Congress and brought members together for a meeting with the Office of Management and Budget (OMB) in May. As of this writing, the FDA has not released the guidance at the anticipated 120-day mark (which was July 29th), nor have they commented on why the release has not occurred. There has been an update in the titling of the Draft Guidance, which now simply reads "*Labeling of Plant-Based Milk Alternatives; Draft Guidance for Industry*."

State labeling:



Kansas SB 261 was signed into law, which prohibits use of "meat" terms on food labels without proper "qualifying language" such as "plant-based," and also requires such qualifying language to be in "close proximity" to the meat term. Our lobbyists worked closely with the Chamber of Commerce to amend the original bill, which would have included excessively narrow parameters for font size and proximity requirements.



PBFA's challenge to a restrictive meat labeling bill in Missouri is still in discovery. The state has delayed responding to motions to compel, resulting in several court dates being pushed back.



In Arkansas, PBFA founding member Tofurky obtained a favorable ruling in its suit against a restrictive meat labeling law, being granted a permanent injunction against enforcement of the law. The court found the law unconstitutional, as it prevented Tofurky from using clear and non-misleading language to inform consumers about its products. The State is assessing the possibility of appealing the ruling and we will continue to monitor the litigation and provide updates as they become available.

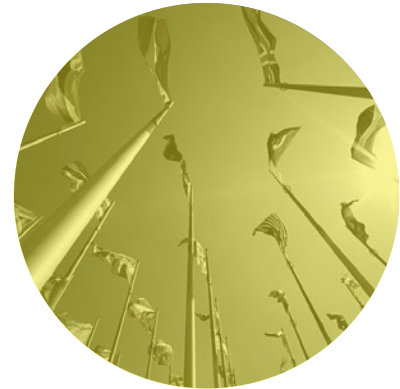


Finally, in Oklahoma, PBFA submitted discovery for our lawsuit against Oklahoma's Meat Consumer Protection Act (MCPA), which restricts the ability of plant-based products to use "meat" terminology on product labels. The state recently filed a motion to dismiss PBFA as a plaintiff in the suit against the Meat Consumer Protection Act (MCPA). The judge ruled against the motion and we are on track to continue litigation in 2023.

POLICY

International collaborations:

Building on our domestic policy priorities, PBFA is tracking plant-based labeling efforts in France, Turkey, Chile, Taiwan, and South Africa. In conjunction with our participation as a founding member of the **International Plant Based Foods Working Group**, we have taken an active role advising local organizations on matters related to policy and best practices for combatting restrictive labeling legislation. In Chile, for example, PBFA worked with a local plant-based advocacy group to help them form arguments against a bill aimed at restricting the types of terms allowed in the labeling of plant-based meat. We continue to be in contact with our international partners and look forward to expanding our collaborative efforts in this space.



Nutrition policy

The second ever **White House Conference on Hunger, Nutrition, and Health** was held in September, and to maximize this opportunity for plant-based foods, PBFA was active on a number of fronts in advance of, during, and after the conference.

To prepare, PBFA hosted a partner-led convening in collaboration with the **Historically Black Colleges and Universities College of Plant-Based Lifestyle Medicine (HBCU-CPLM)**. We submitted a joint report to the White House, sharing the results of the convening and offering several collaborative recommendations, including:

- ▶ Urging the Environmental Protection Agency to exercise its existing statutory authority to protect communities from the harmful impacts of concentrated animal feeding operations (CAFOs).
- ▶ Recommending the White House Conference on Hunger, Nutrition and Health issue an executive order to implement the Food Service Guidelines for Federal Facilities and values-aligned federal food procurement standard.

We are proud to share that PBFA's joint commitment was highlighted by the White House on the day of the conference:

“ENVIRONMENTAL WORKING GROUP, the JAMES BEARD FOUNDATION, the PLANT BASED FOODS ASSOCIATION, the INDEPENDENT RESTAURANT COALITION, and CHEF ANDREW ZIMMERN: Chef Andrew Zimmern will work with the Environmental Working Group, the James Beard Foundation, the Plant Based Foods Association, and the Independent Restaurant Coalition to encourage chefs, restaurant owners, and operators to offer at least one plant-based or vegetarian option on their dinner menus.”

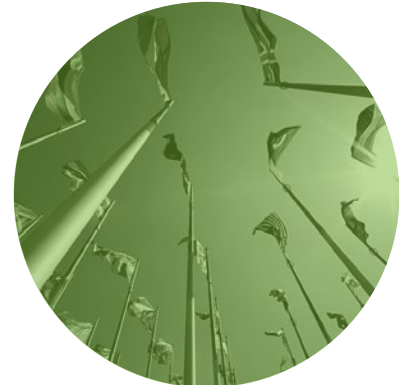
- [White House Fact Sheet](#)

Our work on this front is not done: We anticipate that the **Centers for Disease Control and Prevention (CDC)** will announce an update of Federal Food Service Guidelines in 2023. As a follow-up to the conference, we sponsored a [webinar](#) featuring Chef Andrew Zimmern to highlight the need to bring more plant-based foods into restaurants, and we are looking forward to further collaboration in 2023.

POLICY

School foods:

PBFA advanced our collaboration with Friends of the Earth (FOE) as mutual advocates for plant-based foods in schools. In 2022, we supported their work to provide a directory of plant-based vendors to share with school districts, and in December, FOE presented “*School Foods 101: Selling Plant-Based to K-12 School Nutrition Services*,” a highly informative webinar that provided PBFA members with exclusive access to top food service experts and guidance on preparing products for the unique world of K-12 schools. PBFA members can access the full webinar and presentation slides in the [PBFA Member Portal](#). A PBFA blog post recapping the event can be found [here](#).



Member resource launches:

This year, our brand new [Policy Database](#) went live in our Member Portal, and offers our community detailed and updated information about ongoing labeling legislation and litigation relevant to plant-based food companies.



The policy outlook is bright—and busy—in 2023:

In addition to our continued follow-up from the White House Conference on Nutrition, this coming year will also see Congress’ efforts to pass a new Farm Bill, and we’ll be looking for every opportunity to advance the Domestic Sourcing Initiative. The Dietary Guidelines for Americans (DGA) process will kick into high gear in 2023, and PBFA will work closely with our members on comments to the FDA about the definition of “healthy,” and to the USDA to influence the addition of more plant-based milks to WIC approved product lists. Following the infant formula shortage of 2022, big decisions are ahead regarding the reorganization of the FDA’s food oversight, which could have implications for labeling and updating standards of identity. We expect states will continue to try to prejudice the market against plant-based milks, eggs, meats, and seafood, and this effort will be amplified in other countries—PBFA will be actively working to curtail these efforts and advance our industry, becoming more involved in proactive with state legislators and bringing PBFA members to Washington to meet with policymakers and showcase the many benefits of plant-based foods.

And that’s just what we already know we’ll be doing in the year to come! 2023 will undoubtedly bring some unforeseen opportunities to affect policy change, and in close collaboration with our member community, PBFA will be there to seize those moments.

MARKETPLACE DEVELOPMENT

In 2022, the PBFA team kept the momentum building in the worlds of retail and food service, creating new, meaningful avenues for our member companies to gain insights and expand their businesses, forging strong relationships with key players in those critical arenas on behalf of our membership, and making plant-based foods more accessible than ever to a growing and enthusiastic consumer base.

Generating key market insights:



In April 2022, we published our annual retail food sales data from SPINS, commissioned and analyzed by PBFA and The Good Food Institute. Members got first access to this year's report, which revealed that sales of plant-based foods continue to increase, growing 6.2% in 2021 over a record year of growth in 2020 and bringing the total plant-based market value to an all-time high of \$7.4 billion.

The growth of the plant-based category proved particularly significant in the face of ongoing supply network disruptions presented by the pandemic. The resilience of plant-based foods illustrates strong consumer interest in foods that align with their values and meet expectations for sustainability and social justice, and speaks to the nimble nature of plant-based food companies that navigated supply challenges and displayed unwavering commitment to creating innovative, delicious food for all occasions.

In addition to the report, a comprehensive data toolkit was made exclusively available to PBFA members, which included key talking points, sample social media copy, and a full set of general and category-specific charts and infographics for our member community to use in industry settings.

Engaging with retailers:

In 2022, our Marketplace Development team made incredible strides in building connections and creating new, meaningful opportunities for our members to engage with top retail chains.

We conducted two major primary retailer events, which included our annual **Kroger VegFest**, a key opportunity for our members to connect directly with the Kroger team and showcase their products; and the **Plantsgiving** shopper marketing campaign in partnership with **Hannaford** in November—the success of which has resulted in Hannaford integrating plant-based efforts into their huge, existing spring and fall marketing campaigns for greater scale in 2023. We also launched our **Retail Merchandising Best Practices advisory council**, composed of both PBFA members and retailers and tasked with shaping and defining merchandising best practices in retail (online and in-store), with the goal of transforming the retail environment in favor of plant-based foods.



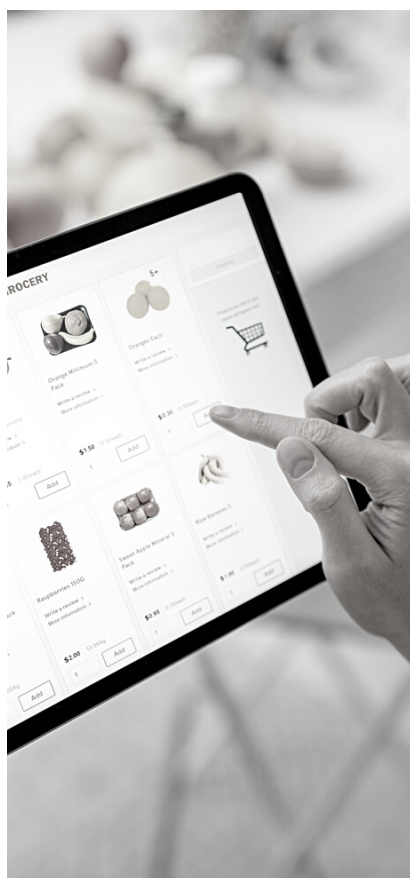
MARKETPLACE DEVELOPMENT

Forging connections in food service:



2022 was a landmark year for PBFA's growing food service agenda: In September, we brought Hannah Lopez onto the team as our Director of Marketplace Development, Food Service. In this role, Hannah has already taken huge strides towards a scalable strategy for our members to expand their plant-based foods and meals into restaurants, college campuses, and other institutional food service settings.

To foster and nurture relationships in the food service industry, Hannah began strategic outreach to providers by hosting introductory calls with Aramark subsidiary Harvest Table, The Independent Restaurant Coalition, Rooted Food Sales Group, Sysco, US Foods, and more. In the year ahead, we will be continuing a robust dialogue with these industry titans for the benefit of our members, and build a strong foundation for food service providers and distributors to collaborate with PBFA and our community.





PLANT BASED FOODS
INSTITUTE

PLANT BASED FOODS INSTITUTE

In 2022, we officially launched the Plant Based Foods Institute (PBFI), the 501(c)3 sister nonprofit organization to PBFA. Working in alignment with PBFA's underpinning ethos that business can and should be a powerful vehicle for transforming our food system for the better, PBFI works domestically and internationally to identify, implement, and evaluate effective business and policy strategies that support a regenerative, plant-based food system—one that respects the rights of all animals to live free of exploitation, ensures fairness for farmers and workers, promotes good health and nutrition, is restorative and remains within ecological limits.

Welcome the PBFI Board:

PBFI welcomed its very first Board of Directors in 2022, which represents a diverse range of leading plant-based brands and esteemed food system advocates, champions, and experts. Board members include:



Rachel Dreskin
CEO, PBFI and
PBFA



Jaime Athos
CEO, The Tofurky
Company



Matt Dunaj
Chief Financial Officer,
Fly by Jing



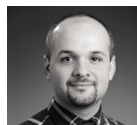
Liz Ross
Founder and
Executive Director,
Rethink Your Food



Audrey Tran Lam
Environmental Health
Program Manager, Center
for Energy and
Environmental Education
within the University of
Northern Iowa



Tyler Whitley
Director, Transformation
Project at Mercy for
Animals



Garrett Broad
Associate Professor of
Communication Studies,
Catalysts for Sustainability
Program at Rowan
University

Food systems:

DSI goes full steam ahead: 2022 saw the launch and first steps of implementation of the Domestic Sourcing Initiative (DSI). Originally under the umbrella of PBFA, the DSI is now an initiative of the Plant Based Foods Institute (PBFI) and will continue to expand its scope in 2023. The 2022 activities of PBFI's DSI included:

- Domestic sourcing pilot projects with top plant-based brands, including Upton's Naturals, Lupii, and Oatly.
- Presentations on the benefits of domestic sourcing and more sustainable farming practices at trade shows and conferences, including Plant Based World Expo North America, Supply Side West, and the RAP Summit.
- Direct presentations to plant-based foods companies.
- Direct presentations to agriculture organizations and educational institutions.
- Meaningful publicity and promotion in the form of press articles, videos, blog posts, and social media content.
- Partnerships with allied organizations, such as Mad Agriculture and The Transformation Project.
- Research on the supply landscape of plant-based ingredients and products.



Built on the outcomes of these activities, PBFI is working to scale the DSI to drive meaningful change in the North American food system—namely a transition from resource-intensive animal agriculture to more efficient production of plant-based food for direct human consumption.

PLANT BASED FOODS INSTITUTE

Food systems, continued:

Showcasing domestic sourcing: The [website](#) for the Domestic Sourcing Initiative (DSI) launched in May, which features remarkable video case studies of DSI pilot partnerships that highlight the incredible work being done on the ground in Iowa, Kansas, and Montana, where PBFA members Oatly, Upton's Naturals, and Lupii, respectively, are working in collaboration with local farmers to source key ingredients and make their supply networks more sustainable.



International work:

IPBFWG takes global lens to plant-based foods: Formed just months before the United Nations Climate Change conference COP26, the [International Plant Based Foods Working Group \(IPBFWG\)](#) is made up of like-minded associations and organizations involved in producing plant-based foods in their respective countries and regions, and of which PBFA is a founding member.

PBFI will champion and advise the work of the IPBFWG through its own dedicated international initiatives and a re-granting program that will support the resourcing of the group's key global priorities. PBFI is also working with the IPBFWG on creating an International Programs Advisory Committee to inform the work of both PBFI and the IPBFWG.

Additional 2022 highlights include:

- IPBFWG shared a joint statement ahead of COP27, urging world leaders to set clear and tangible targets for transition toward sustainable, plant-based food systems that prioritize growing food for direct human consumption.
- PBFI supported the creation of white paper *The Dawn of a Plant-Based Age* – India to lead the way to world food security and nutrition in collaboration with India-based IPBFWG member, the Plant Based Foods Industry Association. In support of this effort, PBFI CEO Rachel Dreskin attended the inaugural Plant Based Summit in New Delhi, India.
- PBFI hosted the first IPBFWG Annual Summit ahead of Plant Based World Expo in September, bringing together representatives from each member organization to set IPBFWG priorities and formalize the official governance structure.



Marketplace research:

In 2022, PBFI collaborated with Kroger to conduct research for a first-of-its-kind Plant-Based Foods Migration Analysis Report, leveraging 84.51° data science and insights to increase understanding of plant-based shopper behavior and sentiment over a two-year period. The goal of this new research was to closely examine plant-based category engagement among Kroger shoppers, including their history of purchasing plant-based foods and shifts taking place between plant-based and animal-based foods—all to identify if, and where, customers are migrating their spend.

Summary of research findings:

- 95% of plant-based consumers surveyed said they increased or maintained their plant-based spend versus the prior year.
- In Year Two, plant-based consumers generally decreased or maintained their level of spending on animal-based foods, which shows a reversal from year one (COVID timeframe) spending.
- 43% of plant-based customers increasing or new to plant-based products chose plant-based milks over conventional dairy milk, and close to 30% of shoppers are choosing plant-based meat, cheese, yogurt, and frozen meals over their animal-based counterparts.
- Customers who buy plant-based foods are motivated by personal health concerns (such as cardiovascular or cancer concerns) and 49% state they believe plant-based alternatives are healthier than animal-based foods.



WHAT LIES AHEAD



The incredible growth and advancement that took place in 2022 is thanks to the dedication, passion, and forward thinking of our members, partners, and allies—as well as the generous support of the sponsors and donors who propelled our community to new heights in 2022.

As we look forward to the coming year, the teams at PBFA and PBFi are energized by the incredible opportunity that lies ahead to drive industry momentum, strengthen our collective, and power the food system transformation necessary to pull our planet back from the brink. Our overarching vision holds strong: To create a world where values and business interests harmonize to create a plant-based food system that respects the dignity and health of all living beings and the planet. And with the close collaboration and partnership of our diverse, cutting-edge member community—as well as the tireless and inspiring work of our staff, Board, allies, and supporters—PBFA and PBFi are perfectly positioned to drive impact in 2023 and beyond.



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