

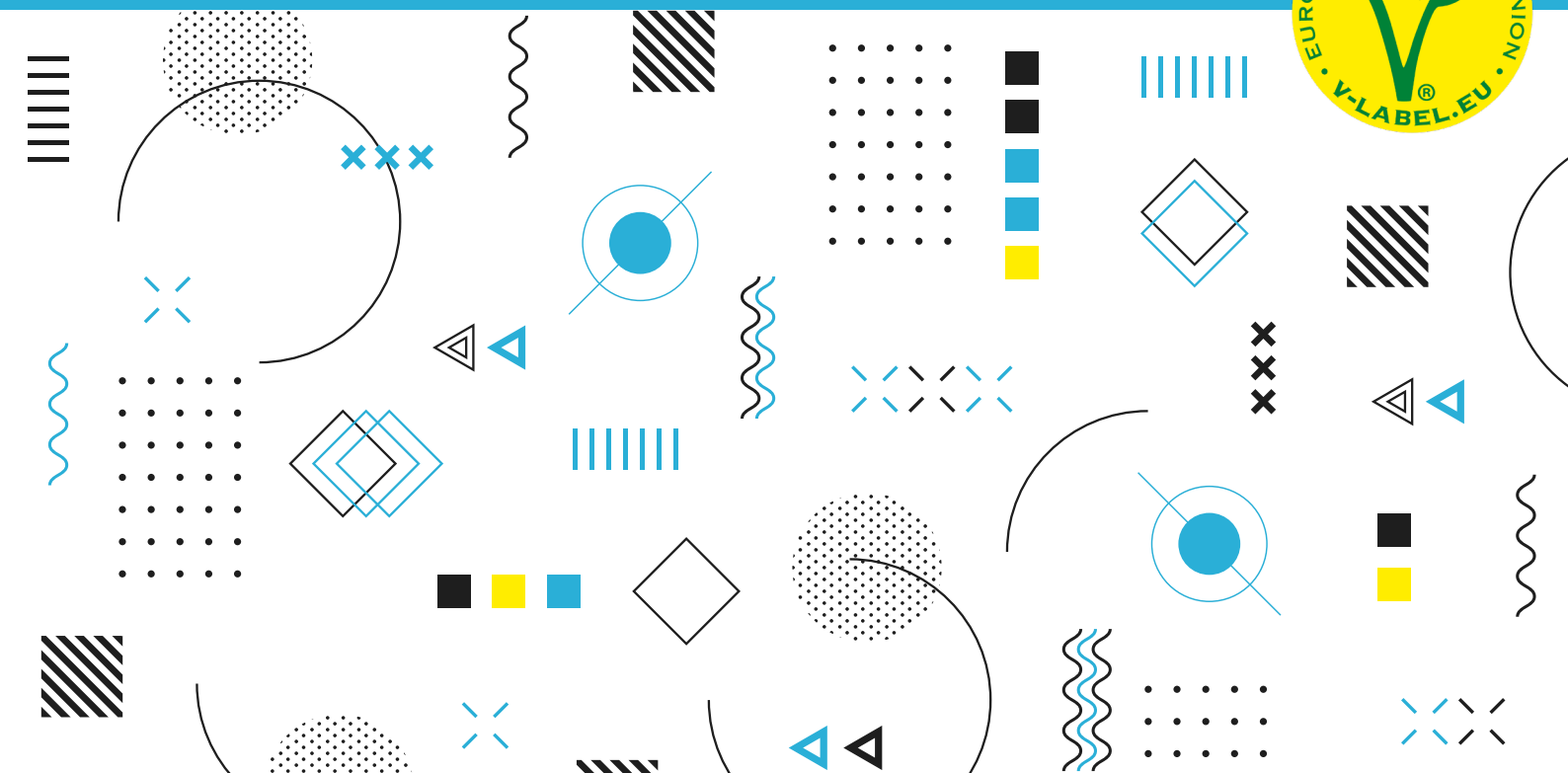


V-LABEL WHITE PAPER

Going Beyond “You Are What You Eat”

YOUR INTRODUCTION TO A RANGE OF PLANT-BASED INDUSTRIES OUTSIDE OF FOOD

World’s leading vegan & vegetarian trademark





PART OF THE **V-LABEL INSIDERS** SERIES

In this day and age, we often look for that one piece of wisdom that quality social media or articles can provide. And maybe it's just us, but often, a nudge is not enough. As change-makers, hand in hand with our partner organizations such as ProVeg International, Swissveg or Fundación Vegetarianos Hoy, we want to roll up our sleeves and get into the specifics. If you seek such content, keep your eyes on our White Paper series: something that's written for experts, by experts, and takes you from A to Z in a given niche without losing an inch of your attention.

For more information about V-Label and additional business and consumer insights resources please visit our website.

www.v-label.eu/resources



Apart from fashion and cosmetics, a huge part of the vegan non-food segment has been overlooked. With so many exciting innovations and materials bringing about business opportunities in this space, and millennials and Gen-Z's sustainability-first approach, it is high time we start talking about everything from home decor to events becoming more plant-based. Why does it matter that a variety of segments, not just food, are vegan? And should producers diversify to non-food products?

WHY VEGAN NON-FOOD IS A KEY FACTOR TO A MORE SUSTAINABLE FUTURE:

Non-food may be an easier entry point for consumers to become vegan rather than changing their diets, simply because we don't buy cosmetics, clothes, books, get tattoos or go to the circus three to five times a day.

The dietary focus of both activists and the media make it easy to forget that **being vegan means more than not eating animal products**. According to Our Hen House, food is the largest source of animal exploitation and environmental pollution, which naturally pushes it to the forefront of public narrative about veganism and change: "We eat much more frequently than we buy clothes or shop for soap, creating many more opportunities each day to choose between enabling or boycotting cruelty – we make over 200 food decisions every day," the non-profit elaborates. The Vegan Society adopted a definition of veganism way back in 1944, and even there, veganism as "a way of living which excludes all forms of exploitation of, and cruelty to, the animal kingdom," includes exploitation and cruelty outside of the food industry. Being vegan means not wearing fur, leather, wool, or silk, not using nail polishes or soaps that contain animal byproducts, or choosing not to buy items that are tested on animals.

With millennials and gen Z's making up to 70% of the global population in 2030, according to Crushman and Wakefield RED, everything from hospitality to haircuts is on track to undergo an unprecedented shift from animal-based to plant-based.

From a business owner's or manufacturer's point of view, getting ahead of the curve may look as simple as



exploring one's options in the non-food segment, paying attention to your existing consumers' preferences, as well as raising awareness about non-food products and experiences connected to your industry and their need to become vegan. How can you increase visibility for your brand or get loyal, raving customers by promoting a vegan non-food cause? You can also go all in and widen your vegan food portfolio with a non-food product. With a lot of manufacturing by-products being used across sectors, perhaps the following examples can give you an idea.

FASHION AND FOOTWEAR

Industry overview

The global vegan women's fashion market was valued at 396.3 billion USD in 2019 and is expected to grow at a 13.6% rate by 2027, according to Statista. The vegan footwear segment led market growth and accounted for 41.3% of global revenue in 2019.

Europe is the major customer base for vegan and cruelty-free fashion. Since 2018, continued growth has been noted in the US and UK. By the end of January, there was a 43% YoY increase in products described as vegan stocked in the UK. In the US, this grew by 64%. A major market for cruelty-free fashion in its own right, the number of vegan products retailing online in Germany has grown by 95% since 2018. France had a 12% growth, but Paris' commitment to becoming the capital of sustainable fashion by 2024 is expected to increase the offering of vegan non-food products.

Opportunities

Contrary to trends, it is important to note that vegan fashion is still **considered a luxury. Shopping for vegan apparel is not (yet) accessible to everyone**, and if nothing else, the COVID-19 pandemic showed just that: with lockdown measures deeply influencing consumer behaviour, store closures impacted sales of vegan fashion across the EU. People have been refraining from buying luxurious clothes and vegan apparel, which usually fall under the premium category, Grand View Research further states.



Similarly to food, tech innovation is expected to make it possible for vegan fashion to become more accessible. There are exciting explorations taking place, just to name a few:

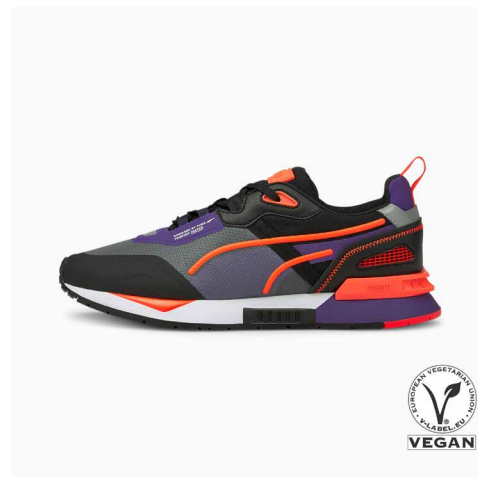
- replacing wool with a desert plant that needs no water while relieving the huge carbon footprint the wool industry has
- vegan leather (also referred to as “unleather”) from tree bark, cactus, pineapple and orange peel (seen in H&M Spring 2019 collection).
- faux fur made of polyester
- silk developed from by-products in the citrus industry
- various up-cycled materials being upgraded into vegan activewear
- natural dyes from sources such as red onion or turmeric.

Challenges

Apart from manufacturing limitations, leather and exotic skins are still prominent materials in the luxury market, synonymous with designers such as Hermes and Louis Vuitton who have built their legacy on leather goods. Luxury womenswear products currently in stock in the US and UK market described as ‘vegan’, ‘non-leather’ or ‘faux leather’ make up only 2.3% of women’s leather goods for luxury brands and are driven predominantly by Stella McCartney, one of the few influential designers to dive deep into exploring innovative vegan fibers.

On the rise

As mentioned, **alternative footwear leads growth in the vegan fashion market**. What makes footwear vegan is the use of leather alternatives. Based on segmentation by material type, the market is grouped into microfiber, recycled plastics, polyurethane, and others. Pineapple (pinatex) or cactus leather are again an option (Bohema Clothing, Poland), recycled plastic bottles are another material used to create vegan shoes, often used for soles. Brands like Rothys use the material to make very good-looking, functional shoes that look nothing like plastic. Apple leather (Po-zu sneakers, UK) as well as high-end mushroom leather sneakers (nat-2, Germany) are other examples. Established brands like Puma, Adidas or Nike also offer vegan alternatives.



Puma has several V-Label certified trainers

"Introducing the Mirage Tech. Its trippy colors, eye-catching layers, and futuristic elements take inspiration from the lights, energy, and atmosphere of EDM shows. Bold combos plus statement overlay details make for a head-turning look. This reimagined silhouette is inspired by illusions and visions – the space between what's real and what your senses tell you. And it's ready to transport you into a world of new realities." - PUMA's website



COSMETICS

Industry overview

Vegan cosmetics is an emerging segment in natural cosmetics that is expected to experience a significant rise in demand in the next five years. Of all vegan products available online at the end of January, the beauty sector makes up 66% in the US and 69% in the UK. In 2019, skincare occupied about 35% of the vegan cosmetics market, followed by hair care (20%). Vegan fragrances are expected to increase at a rate of 8% among all the product segments, according to Beroe's data intelligence research.

The US, UK, Germany, and France are the four countries investing the most in the vegan market, data from analytics firm Edited shows. When it comes to launching vegan products on the market, no sector is moving faster than beauty: of all the new vegan items launched in the UK last year, 82% of them belonged to the beauty category. French organic suncare Biosolis, certified by V-Label, is another example. Across the pond, Milk Makeup and Pacifica are gaining traction for having a 100% vegan product portfolio (also Charlotte Tilbury with the most vegan items in their portfolio). The men's skincare company Bulldog is completely vegan, too. The Body Shop is leading the change amongst established businesses, with over three million vegan products in 2018 and around **half of their product range now being classified as vegan**. Lush has around **80% of their products classified as vegan**, and Sephora has hopped on the bandwagon, too.



The range of certified organic sun protection for the whole family from Biosolis.



Limitations

Counterfeiting in the vegan cosmetics product space coupled with short shelf life are major barriers for growth. “Products with clay or minerals need especially strong preservatives—you are essentially adding dirt to a product and should expect it to be a great starting ground for life,” Essential points out. According to their expertise (they guarantee a 12-month shelf life), educating their customers on the shorter durability of natural and vegan products, together with tips on better storage, is the way to keep sales coming. With “conventional” cosmetic’s average shelf-life between 12 months (foundation) to 2 years (powder and lipstick) to 4 years (nail polish), brands employing the right type of messaging when talking to conscious consumers and offering them products smaller in sizes and packages might easily get past this pain point.

On the rise: from toothbrushes to feminine care

Having an option to choose vegan is increasingly important for consumers in their intimate hygiene, and life: from hair colouring (Tints of Nature) to dental care. Vegan condoms (mylola or FAIR SQUARED) may come as a surprise: obviously, natural rubber’s main source, the milk of the rubber tree, is a vegan ingredient. But what makes many of today’s condoms not vegan at all is the utilization of casein, a protein which is found in cow’s milk, making the finished product not entirely animal-free. Female hygiene is being veganized too, with UK’s Natacare and Finland’s Vuokkoset (V-Label certified).



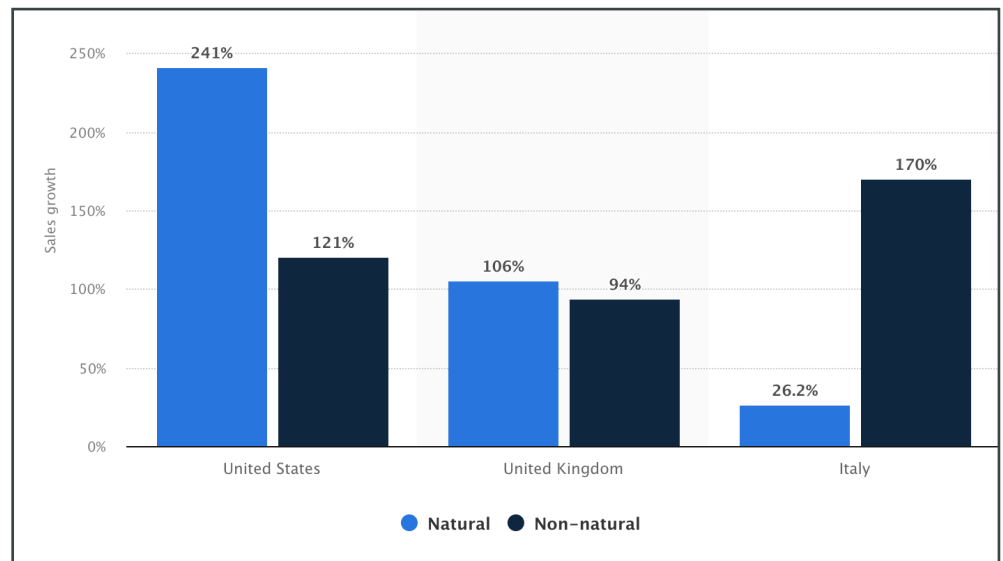
The unique Vuokkoset Bio sanitary towels and panty liners from Finland are biodegradable and vegan.



HOME

Industry overview

Among other things, the pandemic showed us the importance of a clean environment. People became more concerned about their home's cleanliness, protection, and safety. [Statista](#) shows how demand for cleaning products went up during the pandemic - a lot of consumers were still opting for natural rather than chemical ingredients (April 2020), even though the commercial narrative emphasizes that the more chemical, the more powerful.



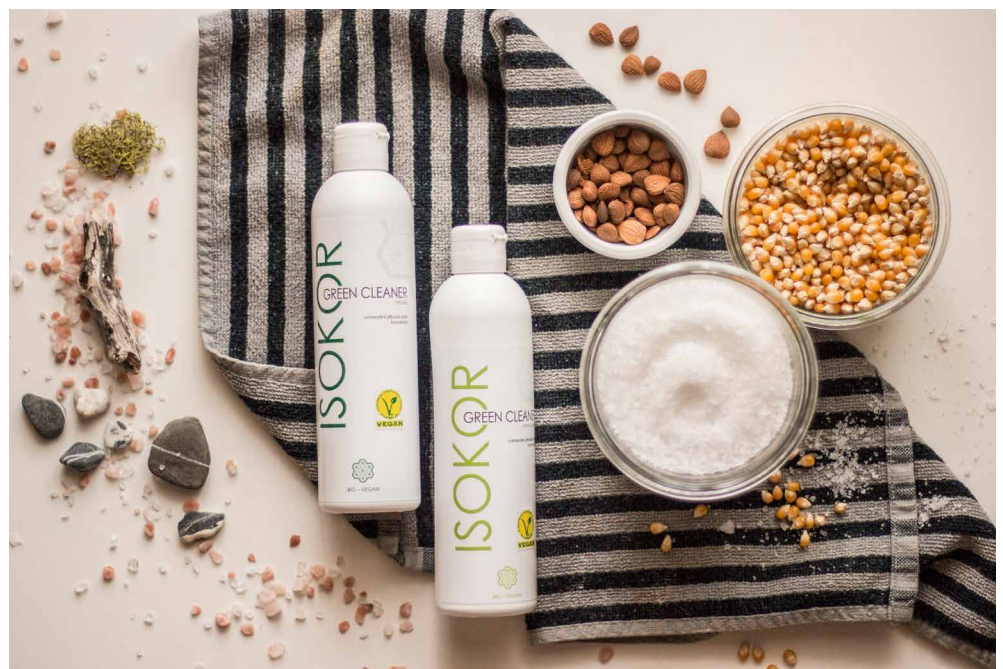
Coronavirus: sales growth of plant-based versus synthetic cleaning products in the United Kingdom, United States, and Italy in March 2020. [Statista.com](#)

Happi mag made their own research on the topic, and there was a **23% average increase in production volume of cleaning and sanitizing products** in the first half of 2020, compared to the first half of 2019. New research from IRI and SPINS reveals that consumers are purchasing more natural products in 2020, even in home care. Moreover, new global production of hand sanitizers by suppliers totaled 427,000 gallons. Green product shoppers are not abandoning their values during the pandemic; in fact, they are doubling down, carefully studying label claims and certifications. From Austria's manufacturer [Planet Pure](#) (certified by V-Label): "Did you know those common household detergents and branded cleaning products may contain as many as five to ten animal-derived ingredients such as; Caprylic acid (sourced from milk), Tallow (rendered beef fat), Animal glycerol, and steric acid (animal fats)?"



On the rise: cleaning agents

Common household cleaners may contain animal-derived ingredients such as beeswax, whey, and animal fats, not to mention they could have been tested on animals for possible toxicity. Vegan home cleaners like Ecover, laundry products such as EcoEgg, Czech and Slovak ISOKOR Bohemia, Polish ZaaZooLaa (both V-Label certified), or even those DIY cleaners made out of household ingredients such as vinegar or baking soda are no less efficient. This vegan disinfectant from RAWI Steinreinigung is made from only two ingredients: water and salt, while still guaranteeing to kill 99.9% of germs. We can even see cleaning services thriving while purely using non-toxic DIY products.



SHEETS AND FURNITURE

What makes a vegan and cruelty-free home is far more than products used to protect it from contamination. Choosing furniture and home decor that are vegan is another step: from sofas to pillows, materials should not contain wool, leather, silk, suede, fur, down, or any other products that were derived from animals, Peta.org says, adding that customers need to make sure the entire piece, not just the outer fabric, is vegan. Some niche businesses are already sparking vegan consumer's attention, like Natural Bedding Company. According to Deezen Magazine, IKEA was recognised in the Vegan Homeware Awards for best faux-sheepskin rug.



CANDLES

The candle market is yet another one that's undergoing change. No laws require candle-makers to list their ingredients, and while most contain paraffin (vegan but too soft to make a firm candle on its own), manufacturers add up to 10% of stearic acid, which comes from animal fat. While coconut-based stearic acid is widely available, most candle-makers opt for the much cheaper slaughterhouse byproduct, [Vegan.com explains](#). Netherland's vegan [Brandt candles](#) and [others](#) are some of the market responses, including Yankee Candle's mostly-vegan portfolio, with the exception of their beeswax items.

BOOKS, PRINTERS AND MEDIA

Industry overview

In The United States alone, the book industry generated over 25 billion dollars in 2019. The latest data on the book market globally come from 2017, when the market size was valued at 143 billion dollars, according to [The New Publishing Standard](#). [Print book sales figures](#) have improved over the last five years, and unit sales now amount to over 650 million USD per year. Print also remains [the most popular book format](#) among U.S. consumers, with more than 65 percent of adults having read a print book in the last twelve months.

Challenges and opportunities

Only a small portion of this huge segment is vegan, and there are frontrunners to change that. Why make printing vegan? Papers consist of much more than just vegetable pulp. Glues to improve structural integrity when wet, or binders and auxiliaries for the surface finishing of coated paper types can contain gelatine (from animal hides and bones), casein (from milk protein), and other substances of animal origin. In addition, printing inks can contain binders and additives made from animal fats or, in exceptional cases, beeswax, [Oeding print](#) from Germany explains. Some special colors may contain color pigments of animal origin like carmine dye from scale insects and adhesives can contain jelly (from animal skins). Apart from Oeding print, another start-up, [Matabooks](#) from Dresden is the first publisher in



Germany to offer vegan novels and notebooks made of grass paper that are biodegradable and mostly handmade. As part of a one-year project, in close cooperation with ProVeg International, they successfully earned the first V-Label certification for a complete printed product that is 100% vegan. They are currently the only printing company in the entire DACH region to do so. In the future, we may see vegan bookstores or libraries emerge.



Matabooks is a young start-up from Dresden. They are the first publisher in Germany to offer vegan novels and notebooks made of grass paper.

What also speaks in favour of making books and printing less animal-based is the rise in demand of digital media. The global e-book market, rising through the pandemic, was valued at 18.13 billion dollars in 2020, and is expected to reach the 23.12 billion mark by 2026, registering a CAGR of 4.9% between now and then, according to [Yahoo! Finance](#). [Audiobook sales in 2019](#) generated over one billion dollars in revenue, and the number of titles produced also grew year-on-year.

On the rise

Even TVs, computers, and mobile phones with LCD displays may contain cholesterol taken from animals, [Livekindly.com](#) explains. [The first vegan smartphone](#) has been launched by the Chinese company Oppo, which is the fifth-largest phone manufacturer in the world.



HOSPITALITY AND TRAVEL

Industry overview

From bistros to high-end restaurants, the food service industry is nearly equal in size to food retailing. Statistically, the demand for vegan options has risen by over 700% per year in recent years, in major countries around the world including the US, UK and Australia, according to [Veganhospitality.com](https://veganhospitality.com). Restaurants, hotels, and other food service businesses that build vegan-friendly service into their mission now will reap the benefits of expanding their customer base, improving staff satisfaction and employee retention, and implementing sustainable food service solutions.

On the rise

Hospitality worldwide, which is a several-trillion-dollar industry, has seen a 123% rise in vegan-specific job roles in 2020, showing an increasing number of traditional businesses seeking specialized skill sets in addition to changing their menu options. And people don't just eat vegan – they travel vegan, too. More than 500 accommodation facilities worldwide meet the requirement of a “veggie hotel.” Most vegan hotels focus on a plant-based all-inclusive. The criteria include more than the food served, since good vegan-friendly hotels also offer alternatives to down-filled duvets, as well as leather-free furniture and hygiene products that have not been tested on animals, according to [ProVeg International](https://proveg.org).

SERVICES

Facials, body, waxing, hairdressing: the vegan beauty industry is much more than cosmetic products. From the UK all the way to Hawaii, vegan beauty salons (or retreats!) were growing in demand before the pandemic imposed restrictions on travel. Beauticians niche down to serve plant-based, environmentally-conscious clients with strictly vegan product lines offered at their salons. There is one treatment in particular that has gained traction amongst young vegans, and that is lash extensions. They are usually made of mink, silk or synthetic and glued with other animal ingredients. “More than 36 million animals die on fur farms around the



world each year. Thirty-one million (or about 90 percent) of these animals are mink,” [Forchics estimates](#). Synthetic lashes made from a polished, acrylic material are an option.

What works for vegan clothing dyes works for vegan tattoo artists. [Vegantattoostudios.com](#) explains: While the exact ingredient list varies from product to product, the most common animal ingredients in tattoo ink include bone char, glycerin, gelatin, and shellac. Vegetable glycerin is used to replace animal glycerin. Hamamelis, also known as witch-hazel, is made from flowering plants and is an important part of vegan tattoo ink. Colour sources again range from turmeric for yellow to logwood for black or monoazo for green and purple.

EVENTS, ENTERTAINMENT AND EDUCATION

Vegan circus

Animal-free circuses have all the thrills, chills, and fun that you expect at the big top—but none of the cruelty to animals. Unlike depressed elephants or monkeys, talented human tightrope walkers, trapeze artists, jugglers, clowns, contortionists, acrobats, fire-eaters, musicians, dancers, and more put on a show for the love of performing, [Beforinnovation says](#) of the new rising trend. There is an animal-free circus to suit every taste, including old-fashioned big tops, Cirque du Soleil, mini shows in neighborhood parks, and large venue productions. [Cirque Italia](#) is a traveling circus specializing in a European performance style. Its “Aquatic Spectacular” features a water stage and aquatic-based performances.

Vegan school

The switch to new educational approaches has found a new type of school - the vegan school! The philosophy behind vegan schools is that students develop and enhance their intellectual, artistic, and practical skills in a holistic way, with a focus on the environment and nature. These schools are dedicated to sustainability, health, and ethics, and serve their students plant-based meals. Notable examples of vegan schools are [the Waldorf school Hagaskolan in Sweden](#), the MUSE school in California, and [the German International](#)



Academy in Chennai, which shows that veganism in schools might be the next big thing, [SocialInnovationAcademy](#) sums up.

Vegan festivals

Vegan festivals attract visitors of all ages, ethnicities, and dietary preferences who are curious to sample vegan foods and make an impact through their lifestyle choices. These festivals are not only about good music and food, but they also try to raise awareness for various social and environmental matters. For instance, [Black VegFest 2020](#) notes that 'it's purposeful, but not a different kind of veganism. It's an extension of community activism for black and poor and oppressed peoples everywhere'. [Vevolution](#) is attracting individuals who are interested in becoming the next 'plant powered positive change makers' and want to be part of constructing a better future. And last but certainly not least, [Veggie World](#) attracts over 250,000 visitors as well as 4,000 exhibitors in 29 locations all over the world and makes business relationships in the vegan space a standard.

THE IMPORTANCE OF CERTIFICATION IN VEGAN NON-FOOD

Because vegan non-food industries are on the rise (or just getting attention), it is that much more important to raise awareness around why it is important that these traditionally animal-based industries largely need to switch to plant-based options.

Vegan non-food is a relatively newly explored area and it is difficult to recognize animal-derived ingredients. Consumers ranging from existing vegans to new vegans, flexitarians and overall conscious consumers who don't necessarily identify with any of these terms, simply need a holding hand. According to [a thesis published at OULU University of Applied Sciences in Finland](#), in reading the product label, the participants tend to search for a vegan indicator and use their brand belief to draw the conclusion of whether the product is vegan-suitable. Their ability to detect original animal ingredients is limited. The Soil Association study conducted in 2019 adds that 76% of consumers felt misled by the labels on beauty products.

The growing importance of vegan food labels: **How do conscious consumers shop beyond 2020?**



More than 23.000 shoppers across 40 countries participated.



91%

prefer products with a certificate such as V-Label.

87%

say products with the V-Label symbol make shopping easier for them.



89%

consider V-Label as useful when shopping.

78%

trust products with the V-Label symbol more than products without it.





GET IN TOUCH TODAY

Transparency is in our DNA. If you have any questions about V-Label, schedule a free call now.



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Sales & Business
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SCHEDULE A FREE CALL

GET CERTIFIED

Ready to increase the visibility of your vegan and vegetarian products? With V-Label, customers will be able to identify your products as vegan or vegetarian at a glance – thus earning their trust without hesitation, double-checking or second guessing the product's quality.



INTERNATIONAL V-LABEL AWARDS



World's leading
VEGAN & VEGETARIAN
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ABOUT V-LABEL

Across the globe, more than 40,000 products from more than 3,500 licensees now carry V-Label.

V-Label is an internationally recognised, registered seal for labelling vegan and vegetarian products and services established in Switzerland in 1996. It is a reliable, go-to shopping guide for consumers.

With more than 25 years of experience labelling products and engaging experts in quality management, food technology, chemistry, cosmetology and marketing, we are the frontrunners of a global movement. As such, we cooperate with businesses, retailers, consumers, and campaigners.

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