



schouten specialist in
plant-based protein

The latest plant-based
market insights for you

August – September 2023

In this update:

- The number of launches in a category is a key indicator of its popularity.
- In the meat substitutes category, we see different developments across countries.
- Like last year, we will highlight the trends in some of these countries in this update.
- We also investigate the role of private label, claims and soy protein.
- Is there a country not featured here for which you would like to see these insights? Please let us know!



Western Europe

- Belgium
- Germany
- France
- The Netherlands
- Spain
- The United Kingdom

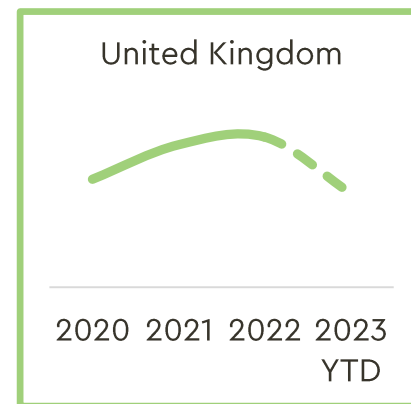
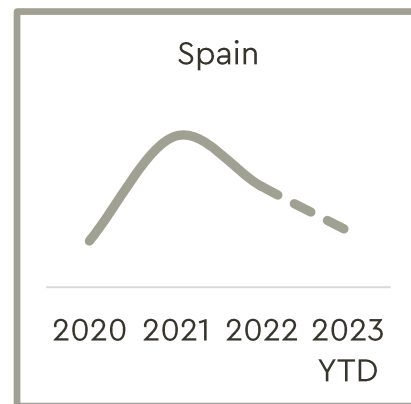
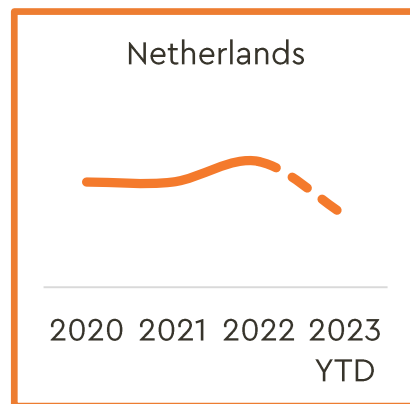
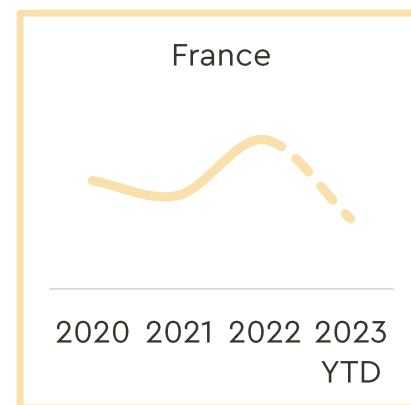
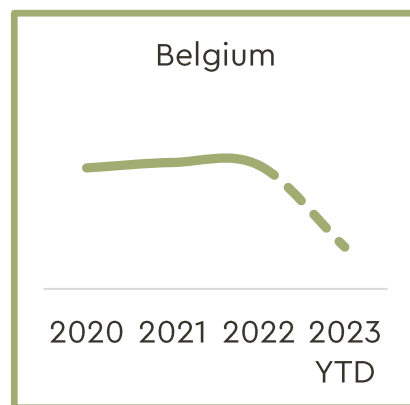
Western Europe

How has the number of meat substitute introductions in retail developed over time? For 2023 we have data until July.

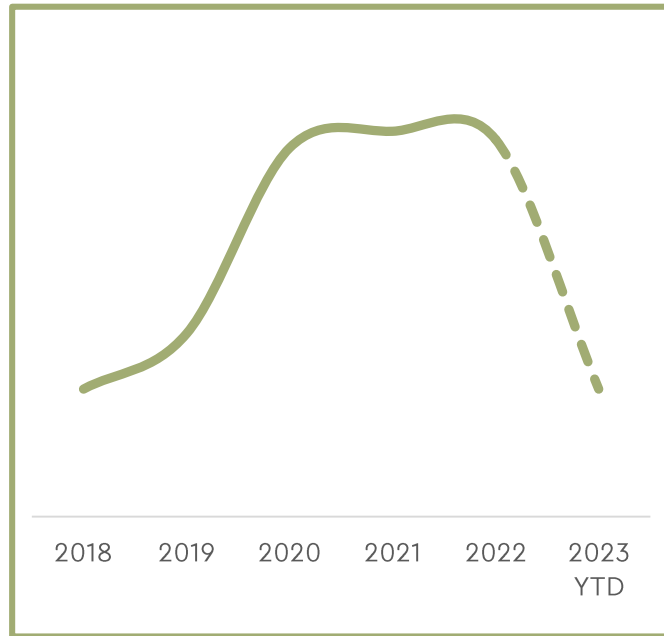


meat substitutes introduced in retail

Note: in this case, Western Europe is the sum of the mentioned countries.



Belgium: 2023 behind on developments compared to previous years. Much soy protein.



meat substitutes introduced in retail

From all launches in 2023:

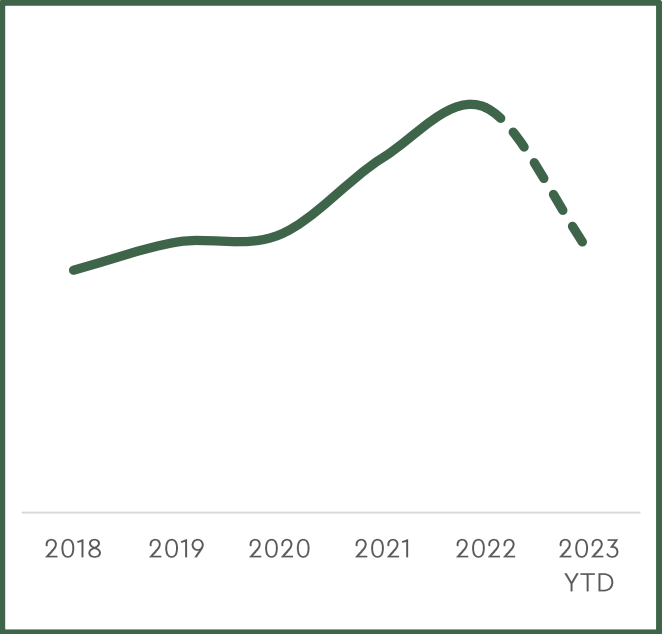
- 43% Private label
- 65% Vegan claim
- 15% Organic
- 67% Contains soy protein



Germany: upward trends, vegan claim seems to be very important.

From all launches in 2023:

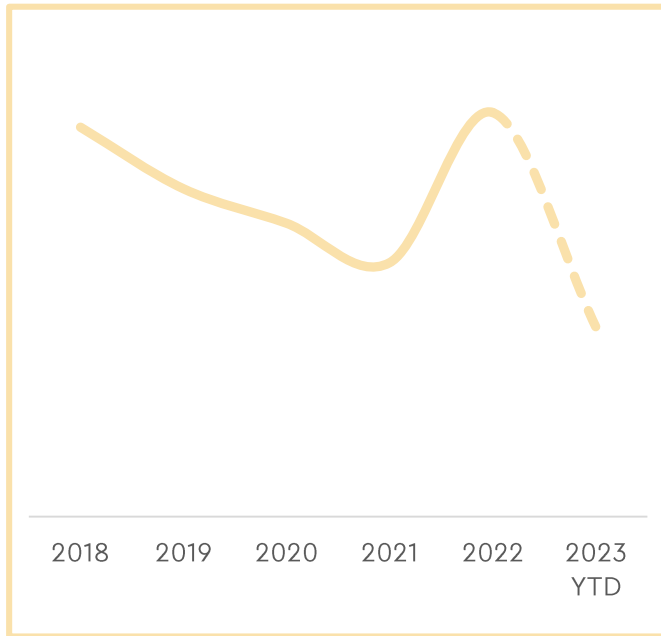
- 20% Private label
- 89% Vegan claim
- 34% Organic
- 27% Contains soy protein



meat substitutes introduced in retail



France: many launches in 2022, relatively many organic and few vegan



meat substitutes introduced in retail

From all launches in 2023:

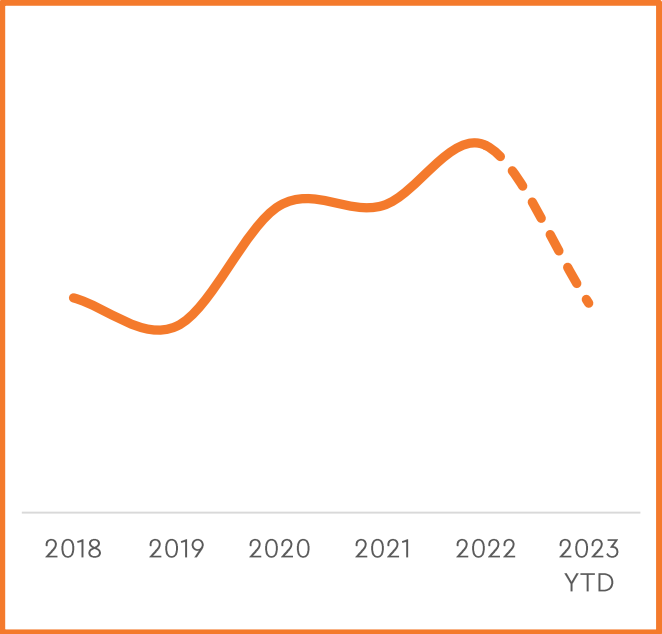
- 23% Private label
- 29% Vegan claim
- 47% Organic
- 21% Contains soy protein



Netherlands: increase appears to flatten in 2023, relatively few organic items.

From all launches in 2023:

- 33% Private label
- 54% Vegan claim
- 8% Organic
- 57% Contains soy protein

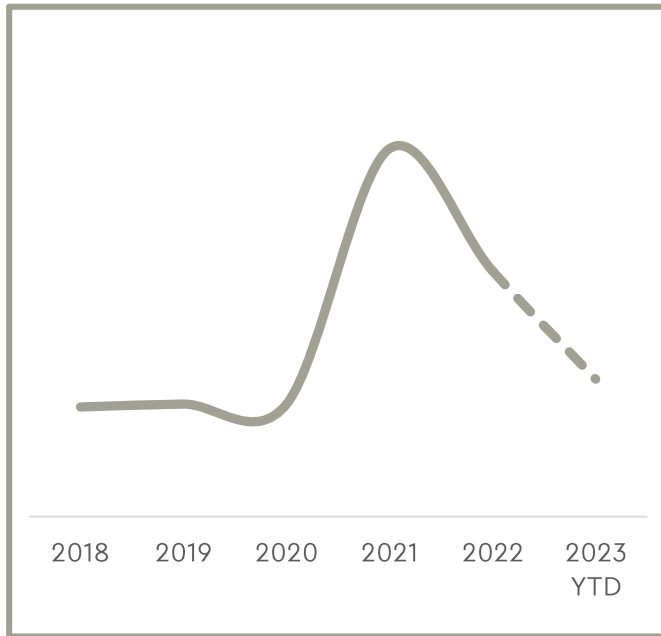


meat substitutes introduced in retail



Source: Innova Market Insights (YTD July 2023)

Spain: after 2021 #launches clearly higher than before.



meat substitutes introduced in retail

From all launches in 2023:

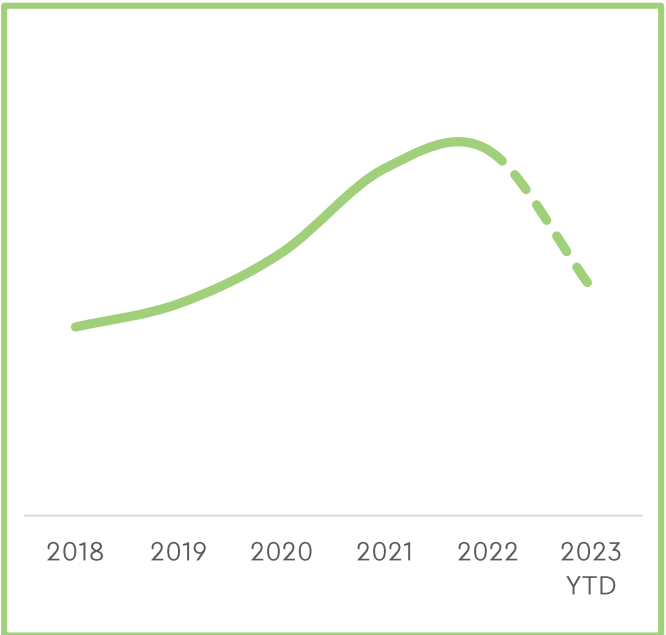
- 20% Private label
- 62% Vegan claim
- 39% Organic
- 30% Contains soy protein



United Kingdom: #launches increased year on year. Organic not important.

From all launches in 2023:

- 40% Private label
- 84% Vegan claim
- 3% Organic
- 52% Contains soy protein



meat substitutes introduced in retail



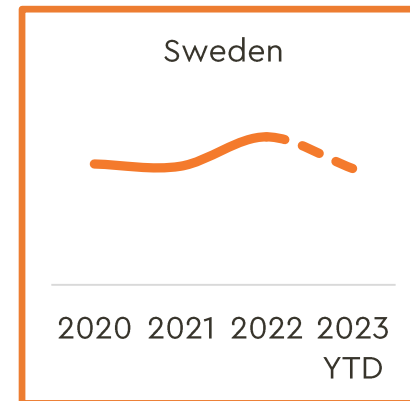
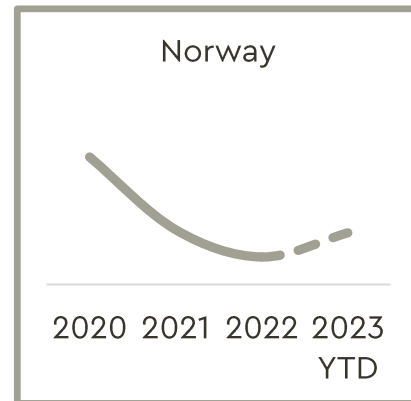
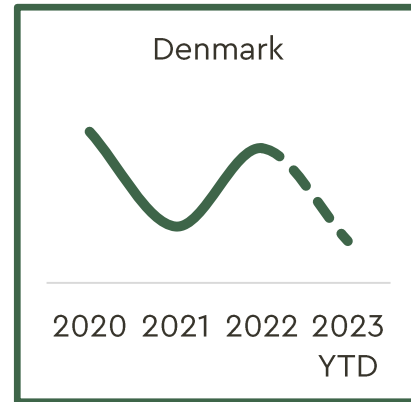
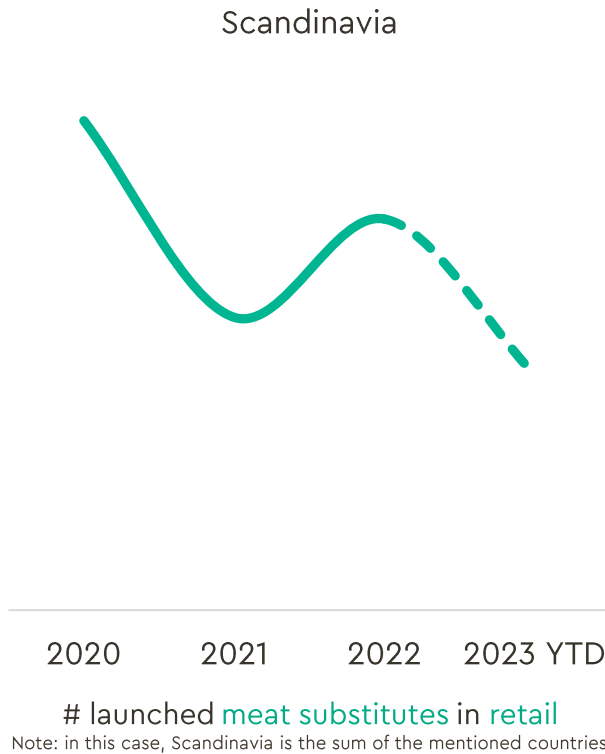
Source: Innova Market Insights (YTD July 2023)

Scandinavia

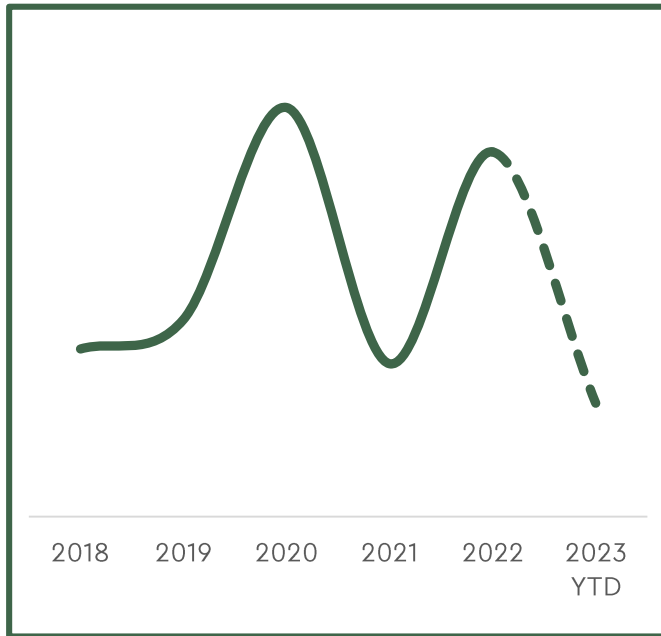
- Denmark
- Finland
- Norway
- Sweden

Scandinavia

How has the number of meat substitute introductions in retail developed over time? For 2023 we have data until July.



Denmark: 2020 and 2022 have been exceptional years.



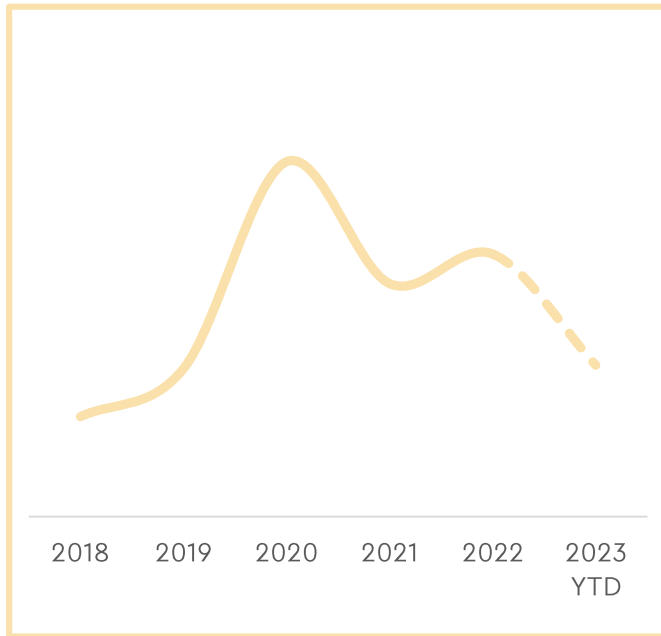
meat substitutes introduced in retail

From all launches in 2023:

- 13% Private label
- 39% Vegan claim
- 35% Organic
- 30% Contains soy protein



Finland: since 2020 the number of launches is higher than before.



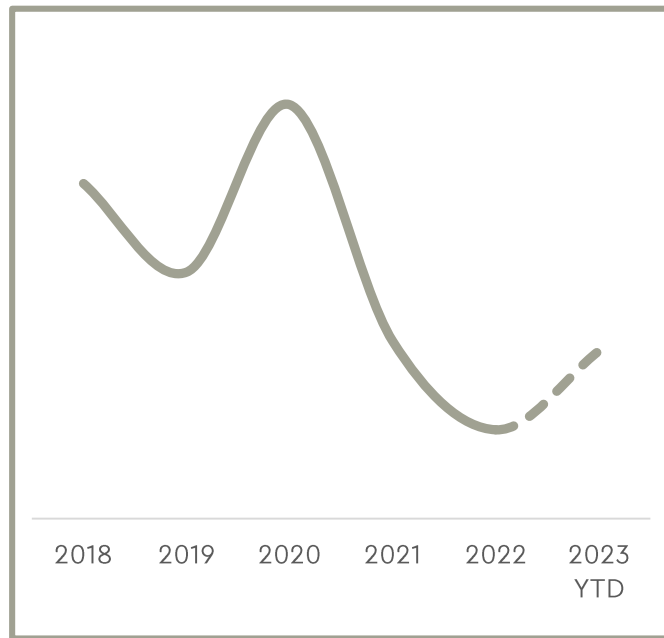
meat substitutes introduced in retail

From all launches in 2023:

- 17% Private label
- 61% Vegan claim
- 10% Organic
- 20% Contains soy protein



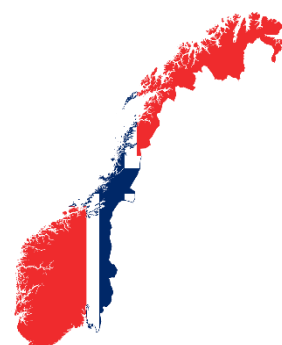
Norway: few launches in previous years, acceleration in 2023?



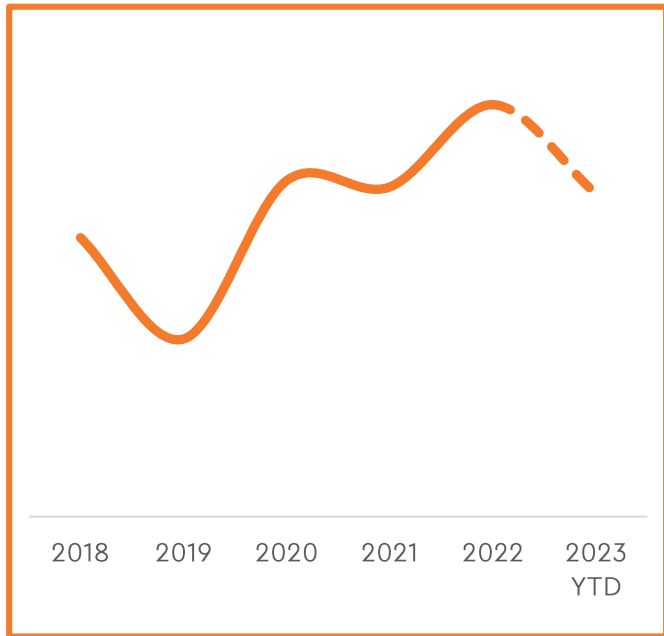
meat substitutes introduced in retail

From all launches in 2023:

- 6% Private label
- 88% Vegan claim
- 12% Organic
- 24% Contains soy protein



Sweden: after 2020 #launches on higher level. Many vegan claims.



meat substitutes introduced in retail

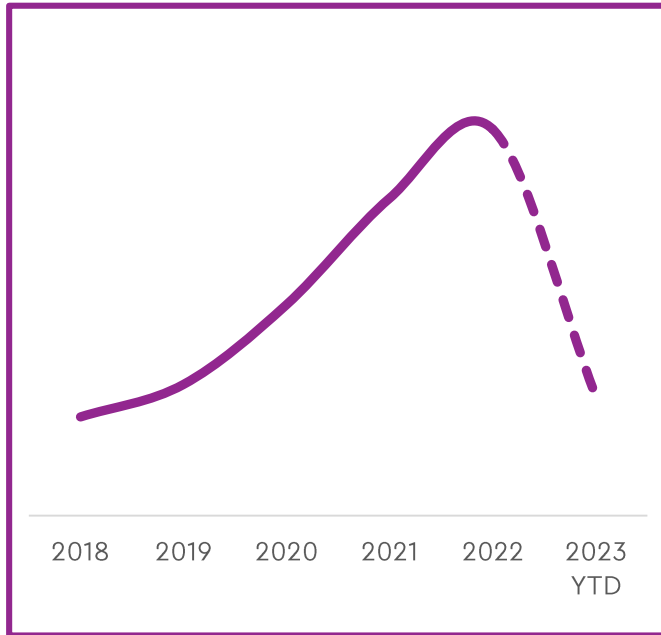
From all launches in 2023:

- 6% Private label
- 73% Vegan claim
- 25% Organic
- 27% Contains soy protein



United States

USA: yearly increase likely to be stopped in 2023.



meat substitutes introduced in retail

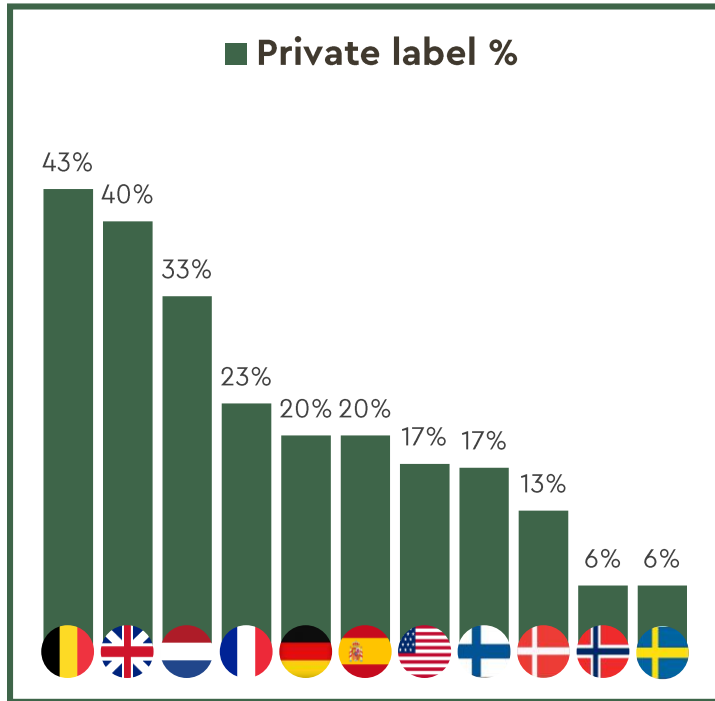
From all launches in 2023:

- 17% Private label
- 71% Vegan claim
- 12% Organic
- 27% Contains soy protein

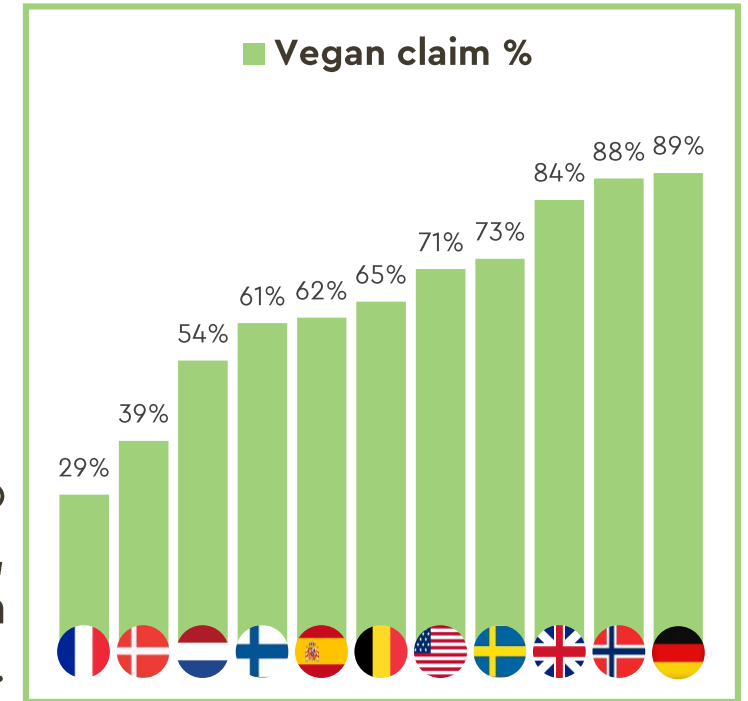


Summary

Summary (1/2)

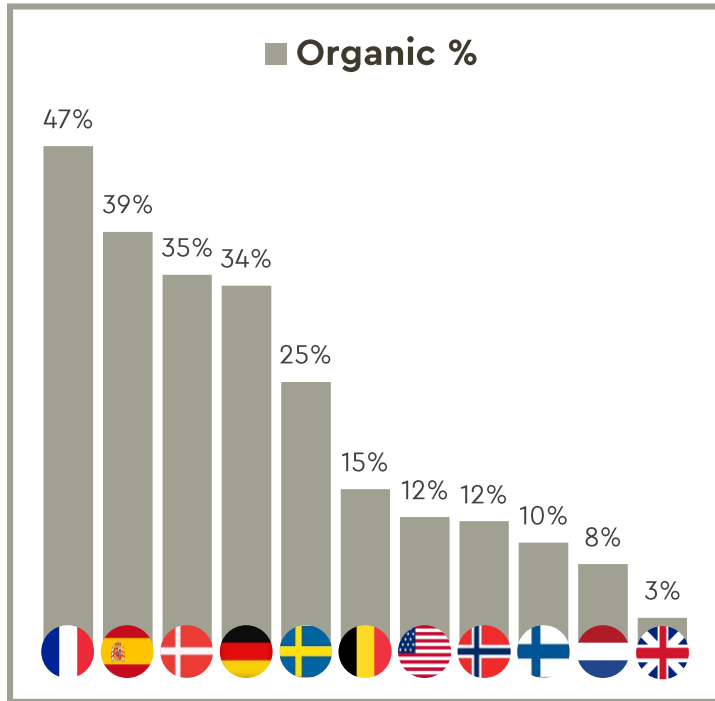


The share of private label among launches in meat substitutes is the highest in Belgium, United Kingdom and the Netherlands.



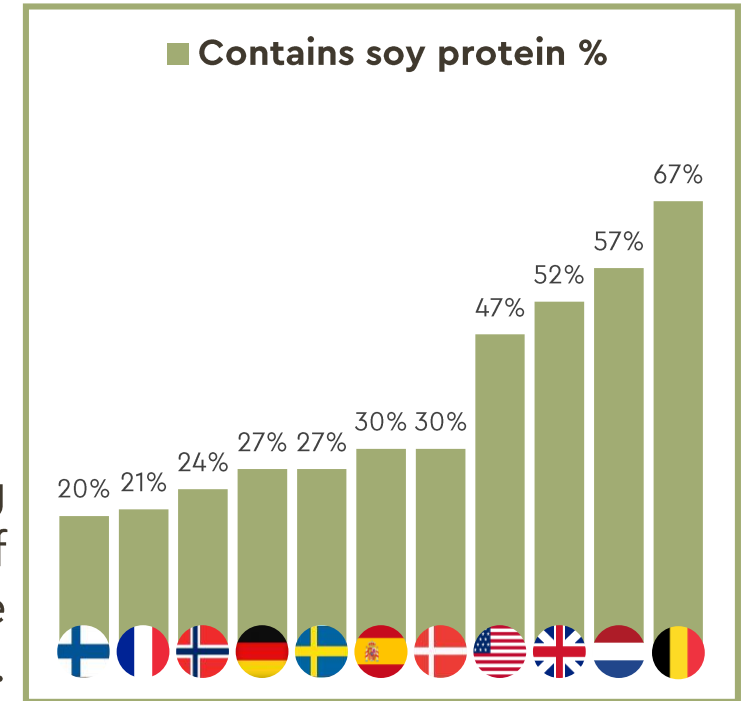
The 100% vegan claim appears to be the most important in Germany, Norway and UK. In France the claim is used the least frequent.

Summary (2/2)



On the other hand, France is the country with the highest share of organic launches. At the same time, organic does not seem to be an important topic in the UK.

When it comes to incorporating soy protein into the introduction of meat substitutes, Belgium and the Netherlands take the lead.



What now?

- Different countries, different product features that are important.
- There's no such thing as "*One size fits all*"!
- Help needed with mapping what's important in a specific country?
- Please let us know, we are very happy to help out!



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Would you like similar information for another country?
Or more in-depth information? Send me a message on
kvdheuvel@schoutenfood.com or give me a call: +31 (0) 183 44 64 63.

Kees van den Heuvel
Trade Marketeer

