



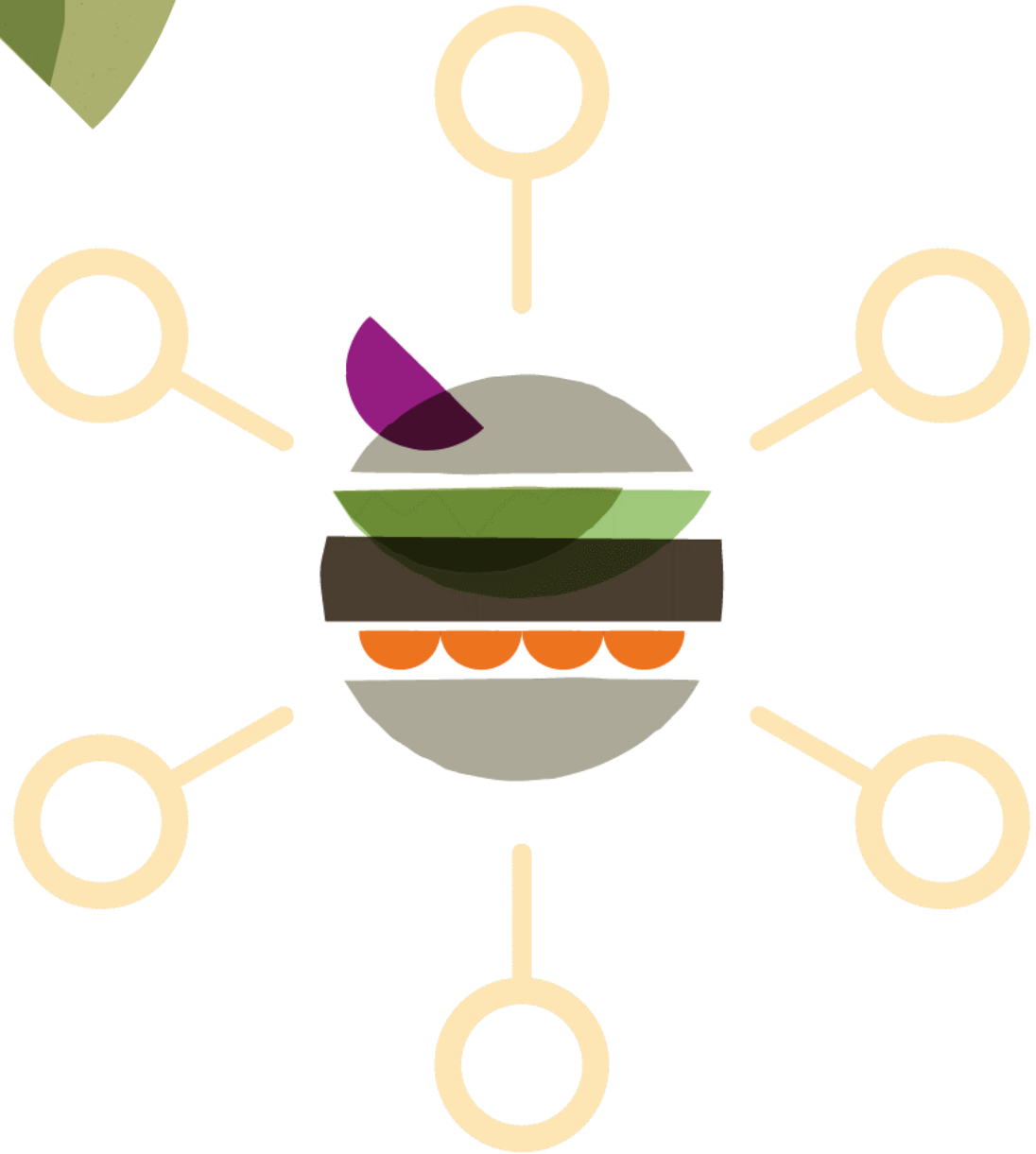
schouten specialist in
plant-based protein

Trend analysis of meat substitutes

August 2024

In this update:

- Based on the top 10 trends that our partner [Innova Market Insights](#) published at the beginning of this year, we investigate how these trends are reflected worldwide in new products in the meat substitute category.



We look at the four trends that have the most in common with the meat substitute category.



What top trends are we looking at?



1. Ingredients: Taking the spotlight

Consumers are increasingly paying attention to the ingredients of a product. Positively highlighted ingredients with positive associations positively influence the purchasing process.



3. Plant-based: the rise of applied offerings

Familiar flavors and concepts help consumers make plant-based choices more often.



2. Nurturing Nature

Consumers find protecting nature and the environment increasingly important in their food choices.



4. Local Goes Global

Consumers like to try authentic products with a clear origin from a certain cuisine or country.



1. Ingredients: taking the spotlight

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A study by Innova shows that a third of consumers are interested in ingredients on packaging.

Healthy ingredients, such as superfoods and probiotics, are promoted through storytelling, labels and influencers.

This helps consumers make conscious choices based on popular ingredients.

1. Ingredients taking the spotlight

Some examples of introductions to this trend



Broccoli Boost Veggie Grounds
Canada – July 2024



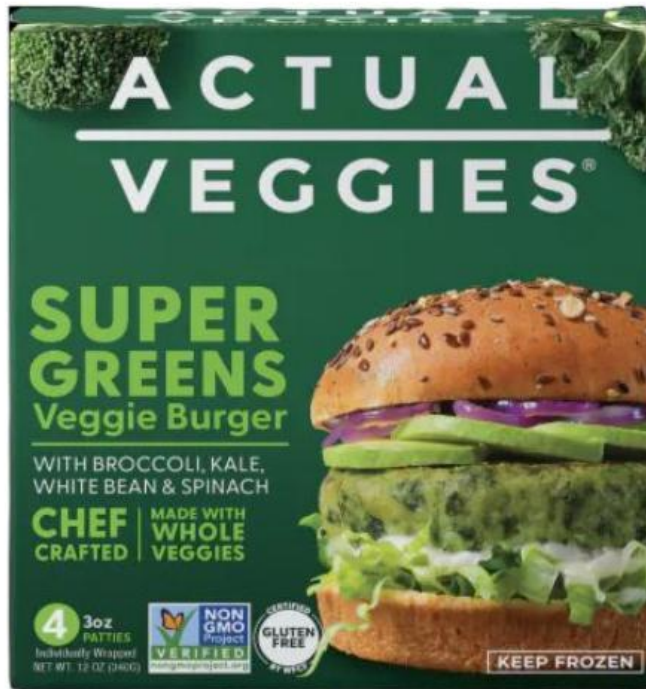
Chickpea Falafel
Lidl Austria – July 2024



Jackfruit Pepperoni
Canada – July 2024

1. Ingredients taking the spotlight

Vegetables and legumes in particular are highlighted



Super Greens burger with kale,
beans and spinach
USA – July 2024



"Green Goddess Burgers"
with spinach, zucchini and
garden peas
Australia – July 2024



Falafel with spinach and pine
nuts; made with chickpeas
and carrot
Aldi, Ireland – July 2024

1. Ingrediënts taking the spotlight

This often concerns non-meat analogues

At Schouten we call these Variations



Pumpkin, Tomato and
Basil Falafel
Aldi, United Kingdom – July 2024



Falafel Zucchini
Albert Heijn, The Netherlands – June 2024



Broccoli and Cauliflower steak
ICA, Sweden – May 2024



2. Nurturing Nature

Innova's research shows that consumers are more concerned about the planet.

They expect companies to take actions for nature conservation, regenerative agriculture and environmentally friendly packaging.

Brands are expanding their efforts into forest protection and water conservation and are increasingly communicating their sustainability measures through packaging labels.

2. Nurturing Nature

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Producers respond to this in different ways

Focused on animal welfare,
minimal processing and local protein



Animal-free MyBacon
Farm-grown Meatless Mycelium
made with minimal ingredients.

USA – July 2024

Focused on organic 'nature-friendly'
cultivation of ingredients and a minimum
number of food miles.



Certified Organic Vegetable
Schnitzels 'Made in France'

USA – July 2024

Focused on the feeling of doing good for
the planet and one's own health.



Taco Mince "'Good for you
and for the planet''

Germany and Sweden – May 2024

Only 45% of consumers see meat substitutes as more sustainable than meat

Communication about environmental benefits remains important with meat substitutes



45%

of consumers worldwide **think meat alternatives are better/much better than regular meat products** in terms of sustainability.



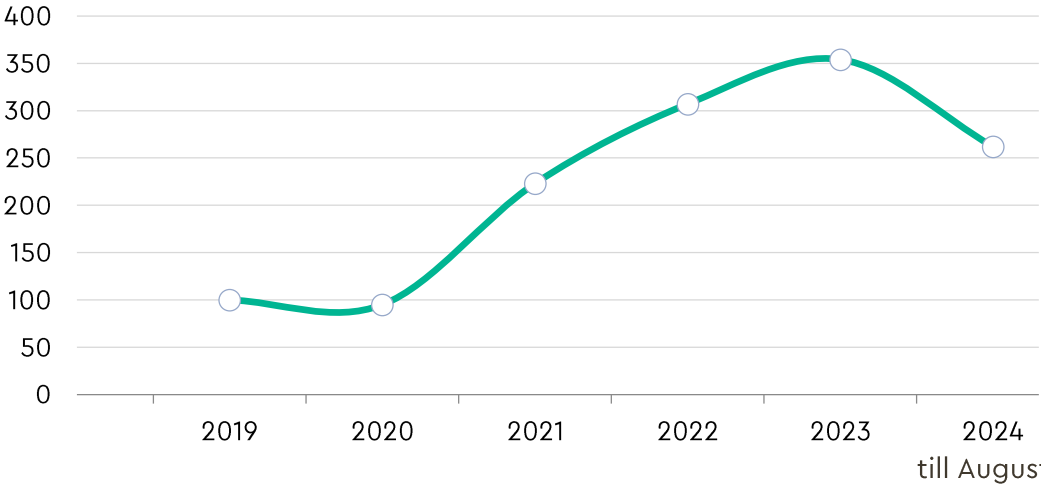
4 in 5

consumers are **open to trying fish substitutes**



Plant-Based Sea Sticks
Delhaize, Belgium – June 2024

Indexed number of new fish substitute launches worldwide
(Index: 2019=100, 2019-2023)



2. Nurturing Nature

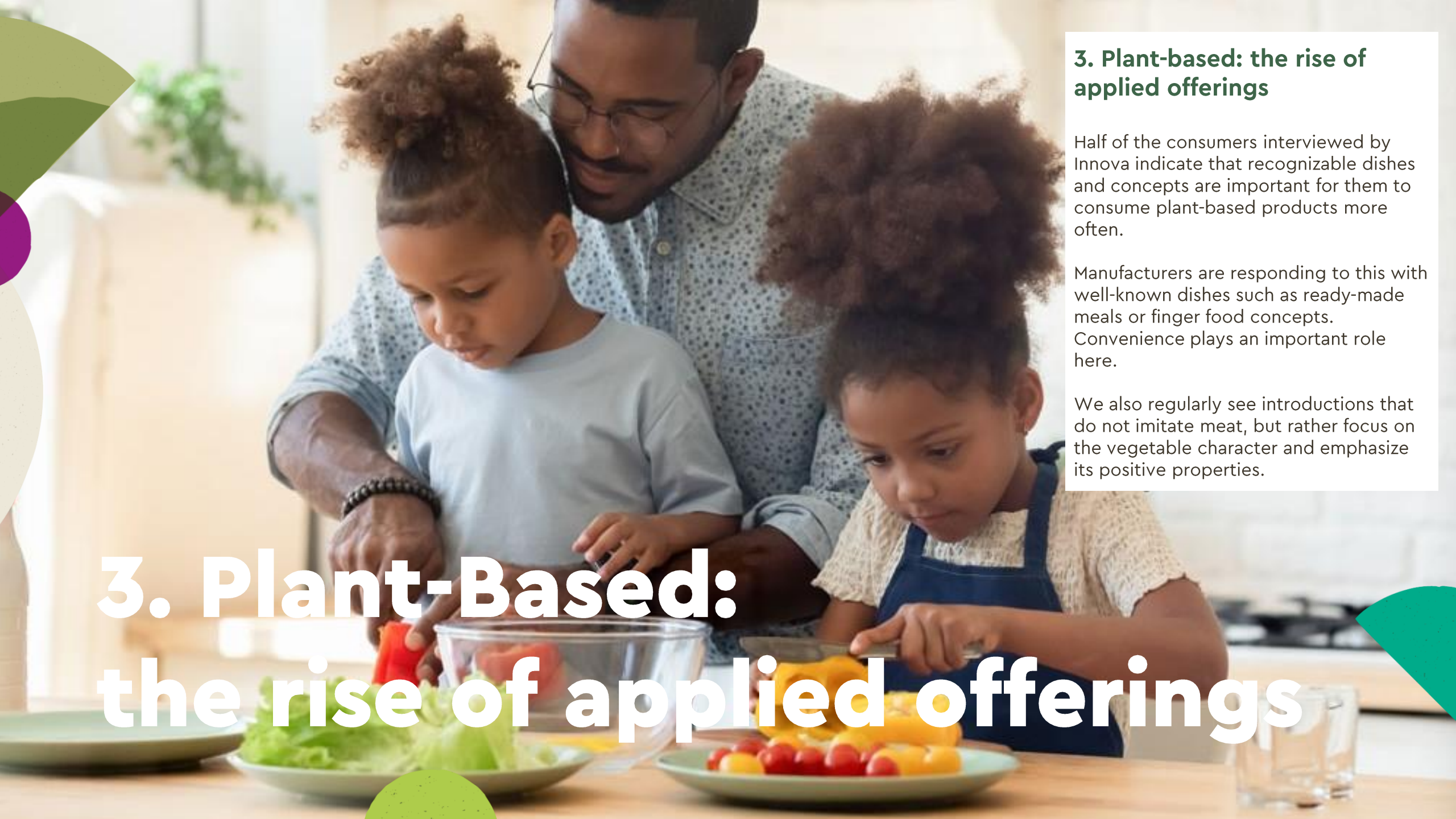
Dutch retailer Albert Heijn introduced 'carbon labelling'

CO2 labeling on own brand products to help consumers make informed choices.



59%

of consumers worldwide say: "The CO2 emissions associated with a product are the most important factor in determining how sustainable a product is."



3. Plant-based: the rise of applied offerings

Half of the consumers interviewed by Innova indicate that recognizable dishes and concepts are important for them to consume plant-based products more often.

Manufacturers are responding to this with well-known dishes such as ready-made meals or finger food concepts. Convenience plays an important role here.

We also regularly see introductions that do not imitate meat, but rather focus on the vegetable character and emphasize its positive properties.

3. Plant-Based: the rise of applied offerings

4. Plant-Based: the rise of applied offerings

Familiar concepts, but plant-based



Vegan Curryworst

Aldi Nord, Germany – July 2024



Vegan 'Meat' Balls in Tomato Sauce

Consum, Spain – July 2024



Vegan Lasagne

Delhaize, Belgium – July 2024

4. Plant-Based: the rise of applied offerings

Often focused on convenience



Chili sin Carne

Lidl Germany – July 2024



Couscous met Falafel

France – July 2024



Vegan Bolognese Mince

South-Africa – July 2024

4. Plant-Based: the rise of applied offerings

Recognizability leads to trust



Vegan Chicken Kiev
Megamarket, Ukraine – July 2024



BBQ Skewer
Billa, Austria – July 2024



Vegan Buffalo Wings
Sweden – June 2024

4. Local Goes Global

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This trend shows that consumers are loyal to their own local dishes as well as to world dishes that use local ingredients.

Two-thirds of global consumers surveyed by Innova are open to trying new international cuisines.

These can be authentic, adventurous foreign dishes, but also globally influenced dishes made with local ingredients.

Companies and brands can spark consumer interest in trying international dishes and taking pride in local ingredients.

3. Local goes global

Lots of interest in new dining experiences



2 out of 3

Consumers worldwide: "I am open to trying new global cuisines"



Korean Style – Burgers
Sainsbury's, United Kingdom – July 2024



Arabic Minced 'Meat' Sticks
Albert Heijn, The Netherlands - June 2024



No Lamb Kofta Kebabs
Sainsbury's, United Kingdom - June 2024

3. Local goes global

Plenty of introductions that respond to this



Thai Croquettes
Argentina – July 2024



Tofu Mexican with
French soy
France – July 2024



Black Forest Tofu
France – July 2024

3. Local goes global

With very different flavors and product types



Korean-Style
BBQ Slices
Indonesia – July 2024



Polish "Kielbasa" sausage
made with proteins from peas
and fava beans
Hungary – July 2024



Moroccan Style Patties
Australia – July 2024

3. Local goes global

Asian and Central European products are popular



Indian Snack Balls 'Massala'
France – July 2024



Asian Falafel with Hokkaido
Pumpkin & Almond
United Kingdom – July 2024



"Bernese Style"
Sausages
Germany – July 2024

A woman with long brown hair, wearing a maroon top, is seated at a table in a restaurant. She is holding a fork and knife, with a piece of food on the fork. The background is blurred, showing other tables and chairs. There are decorative overlays: a green circle in the top right, a green circle in the bottom left, and a green circle in the bottom right.

What's Next?

What's next for meat substitutes?

- 1 Although consumers like to make environmentally friendly choices, a large proportion of them are not yet (sufficiently aware) of the environmental benefits of plant-based compared to animal-based.
- 2 CO2 emission calculations will also increasingly appear on the packaging of meat substitutes. It offers consumers an important tool for a more environmentally friendly choice.
- 3 This will encourage manufacturers to take an even more critical look at raw materials and ingredients and their sourcing, production techniques, packaging and transport.
- 4 There remains room for both [classics](#) (meat-like) and [variations](#) (non-meat-like), but with less and less processing and more and more local raw materials.



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