



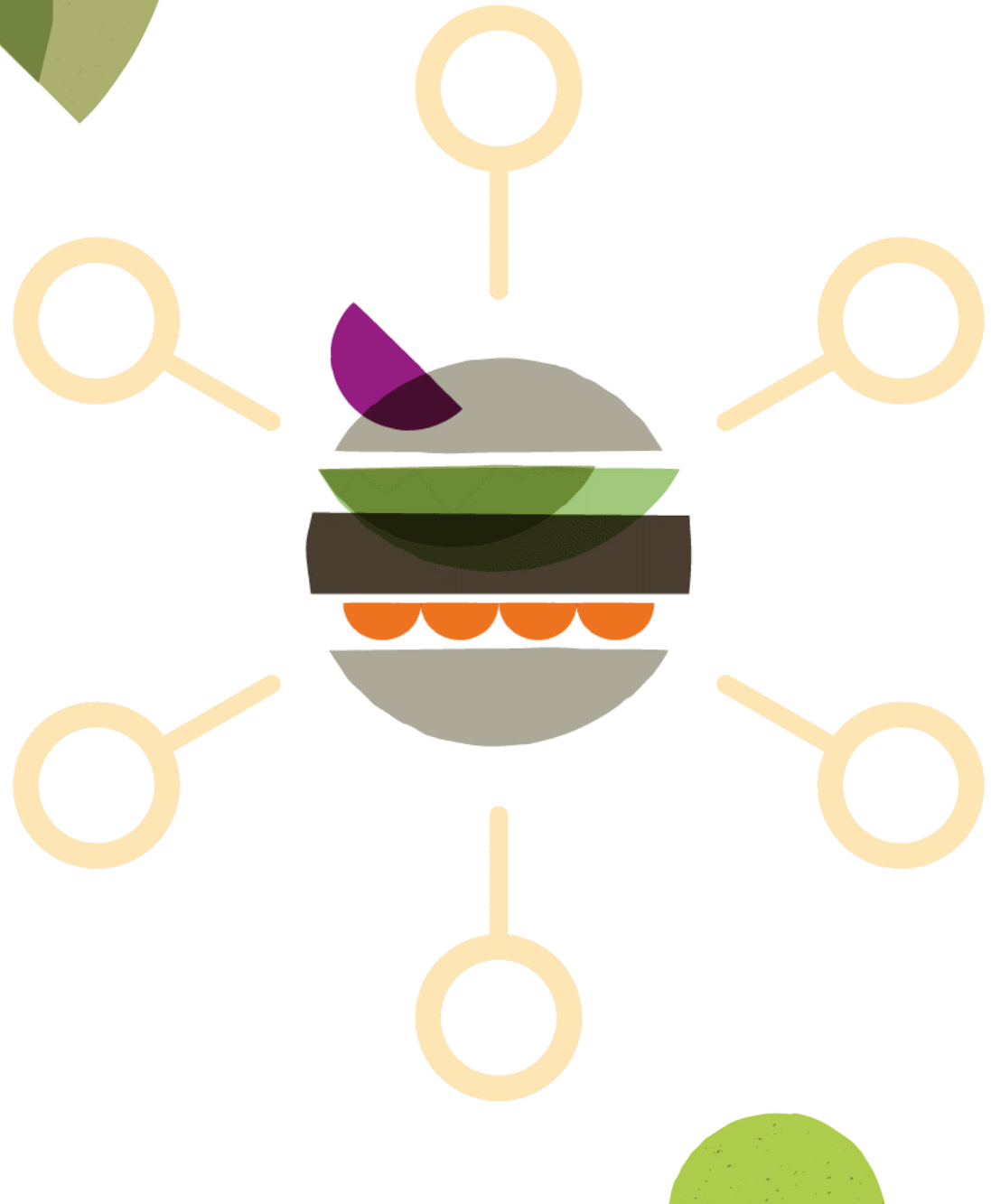
**schouten** specialist in  
plant-based protein

## Trend analysis meat substitutes

Based on Top 10 Food Trends 2025

## In this update:

- Each November, Innova Market Insights publishes their top 10 food trends for the following year.
- They recently released the 10 trends for 2025.
- In this update, we will highlight the most important trends for the meat substitute category.







A close-up photograph of a hand holding a green pea pod, with several bright green peas visible inside. The background is a blurred pile of many more green peas. The image is decorated with abstract geometric shapes: a white and purple circle in the top left, a green triangle in the top center, a teal triangle in the middle right, and a green circle in the bottom left.

# **1. Ingredients and beyond**



# Trend 1. Ingredients and Beyond

As the demand for added value becomes standard, elevating quality beyond ingredients is key

quality

brands

added value

Trend #1

Ingredients:  
Taking the  
Spotlight



## 2024 – Finding the star ingredient

### The new standard: Protein everywhere



Australia, Oct 2024



Brazil, Aug 2024



Israël,  
Sep 2024

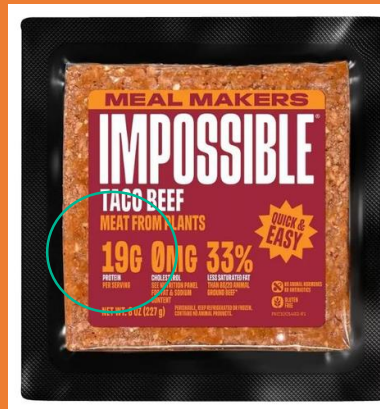
#### Obstacles

- Easy to replicate
- Lacking identity

## – How to stand out?

*Developing a coherent narrative around quality*

**#1** **Quality of product** is the most important factor for consumers in food and beverage brands



United States, Oct 2024

### "19G Protein"

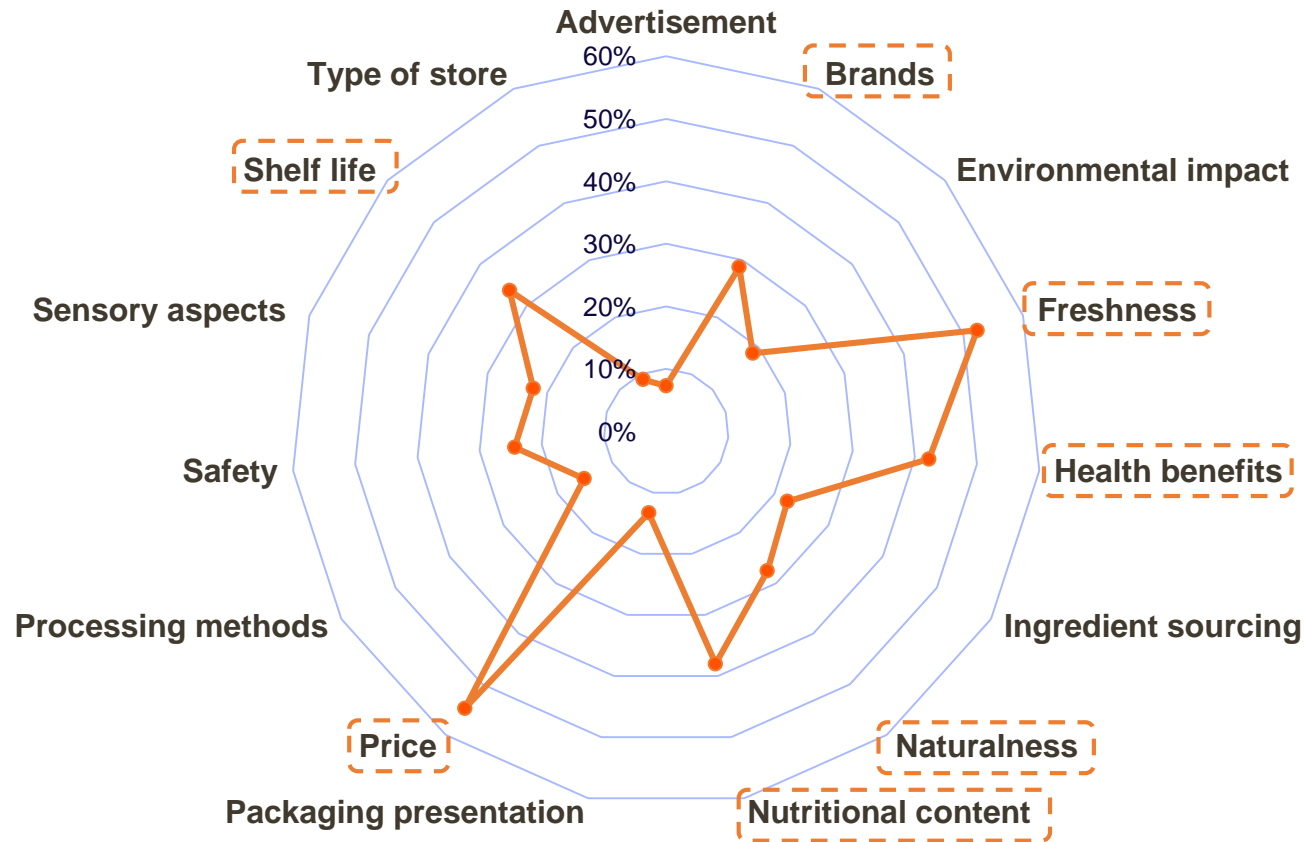


**Sources:** Innova Lifestyle & Attitude Survey 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Atkins



# Examining quality through the consumer lens

## What is quality for consumers?

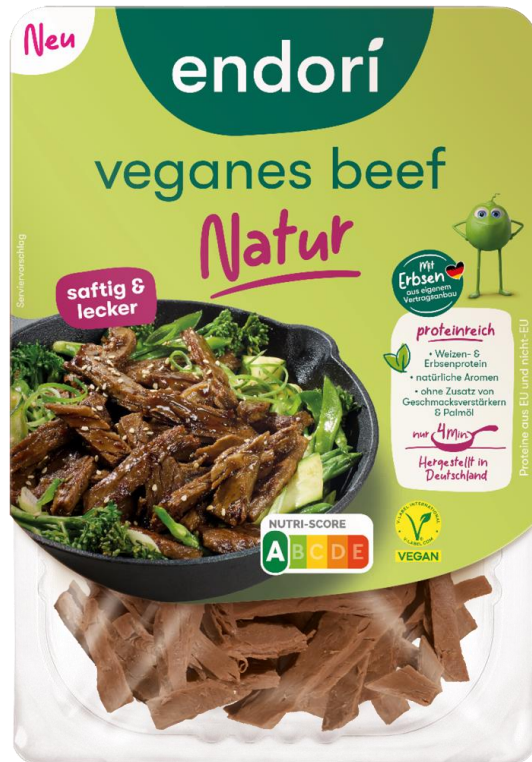


**Sources:** Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), [BTR Nation](#)

**Note:** Q: Which of the following criteria do you use to assess the quality of food and beverage?

# Producers of meat substitutes are responding to this

A lot of attention to "protein" and "local sourcing"



Endori Vegan Beef "Natur"  
Rich in protein – Made in Germany  
Germany – November 2024



Falafel with Swedish Yellow Peas  
Axfood, Sweden – October 2024



No Chicken Balls –  
"with extra virgin olive oil"  
Sklavenitis, Greece – October 2024



# Multiple introductions are seen all over Europe

A lot of attention to "protein" and "local sourcing"



Next Level Fleisch  
Alternative "Made from organic oyster  
mushrooms, refined with Italian herbs"  
Austria – October 2024



Gemüse-Hafer Ballchen  
REWE, Germany – October 2024



Thai Protein Bites "20 G Protein"  
The Netherlands – September 2024



A person wearing a blue floral dress and red rubber boots stands in a garden, holding a wicker basket filled with various vegetables like carrots, corn, and tomatoes. The garden is filled with large green leafy plants, and a wooden trellis with vines is visible in the background. The scene is bright and sunny, with a clear sky. Decorative geometric shapes in green, teal, and purple are overlaid on the image.

# 5. Rethinking plants



# Trend 5. Rethinking Plants

The intense buzz of plant-based alternatives has quieted, rerouting consumers' natural pursuits to plants in real and recognizable forms

Lack of perceived naturalness is a growing barrier for plant-based products

Why would you not consider buying 100% plant-based products?

**Too processed or artificial ingredients**

2024



2025

**#5**  
barrier

**#3**  
barrier



Switzerland, Jun 2024

Top features associated with the term **plant-based**



42%

Healthy



35%

Natural

Ingredients: Water, soy protein, rapeseed oil, flour (rice, beans), spices, beetroot concentrate, yeast extract, cultures, sugar cane, salt, vitamin B12.

# Stripping it back: Companies explore a cleaner approach to plant-based

**+23%**

average annual growth in vegan or plant-based food and beverage with a **natural claim**  
(Global, CAGR Jun 2020-Jun 2024)

"With **pure natural ingredients** and an oat base."

Greece,  
Jul 2024



August 14, 2024

Lurpak introduced plant-based: offering consumers a dairy-free alternative with a minimal ingredients list



TerraMeat: Alt-dairy brand  
Elmhurst 1925 is now making meat analogues, with just one ingredient

**green queen**

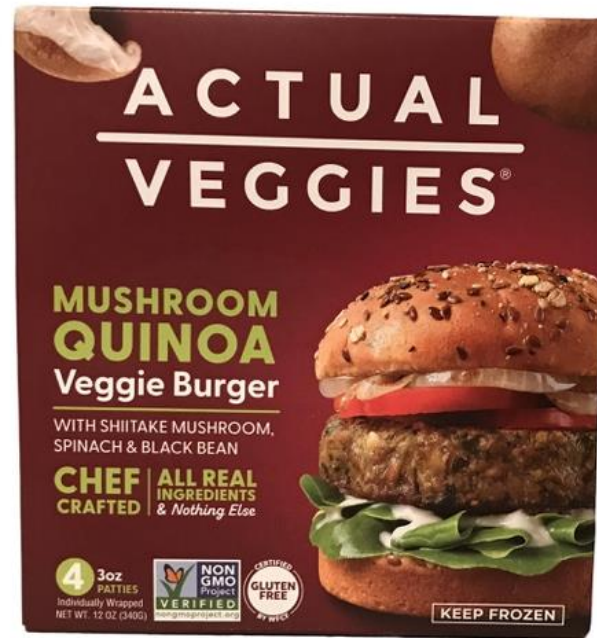
July 29, 2024

*Elmhurst*  
Est. 1925

Sources: Innova Database, [Arla](#), [Green Queen](#), [Elmhurst 1925](#)



# Meat substitute producers are working on fewer ingredients and less processing



Better than Pork – Pulled Nature  
Italy – November 2024

Ingredients: Water, vegetable proteins 32% (peas, sunflower, oats), pea fiber, rapeseed oil, spice mix, vitamin B12.

Mushroom Quinoa Veggie Burger  
"All real ingredients & Nothing else"  
King Soopers, USA – October 2024

# Recognizability and transparency are important



Mexican bites with beans, spices, sweet corn and jalapeno with a sprinkle of coriander.

Australia – October 2024



Plant-Based mince with only a few ingredients: Pea protein (96%), barley malt extract, flavoring.

Germany – October 2024



Plant-based cajun sausages with simple, plant-based ingredients and avocado oil.

US – August 2024





## 6. Climate Adaption



# Trend 6. Climate Adaption

Brands and consumers must find balance between personal values and product choices to get ahead of an everchanging climate

## Tangible impact in food and beverage



### Chocolate

**Coatings and fillings:**  
Cargill chocolate facility  
tackles cocoa sector  
challenges

Aug 2024



### Coffee

**Coffee concerns:**  
Volatile supplies, extreme  
weather and soaring prices  
weigh heavy on the sector

Aug 2024



### Orange juice

**Orange juice crisis:**  
IFF explores citrus  
product reformulation  
with alternative fruits

Jun 2024



48%

**Almost half** of consumers globally  
are very or extremely **aware** of the  
impact of **climate change**



### Olive oil

**Olive oil prices climb**  
as production falls to  
lowest levels in a decade

May 2024

**Sources:** Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Food Ingredients

First, Food Ingredients First, Food Ingredients First, Food Ingredients First

**Note:** Q: To what extent are you aware of the impact of climate change?

# Price sensitivity and climate change: Consequences for consumers



**Price** is the top food and beverage aspect most **affected by climate change** according to consumers globally

If the price of the product increases, I would...

Stop or reduce buying it

Still buy it



Chocolate



Germany,  
Sep 2024

Coffee



Nestlé aims to strengthen coffee supply chain with new high-yielding Arabica variety



Jul 2024



**Source:** Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US), Choviva, Nestlé  
**Notes:** Qs: To what extent do you think the following aspects of food and beverage products are affected by climate change? What will you do if the price of the following products increases due to the impact of climate change on product sourcing or production?

# More and more attention on pack for climate benefits and a sustainable production chain



Soya Fish – "Earth Conscious"  
South Africa – October 2024



Veganer Speck aus  
biologischer Landwirtschaft  
Slovenia – October 2024



"Carbon Neutral" Plant-Based  
Classic Sausages  
Australia – September 2024



# From "low footprint" to specific CO2 data

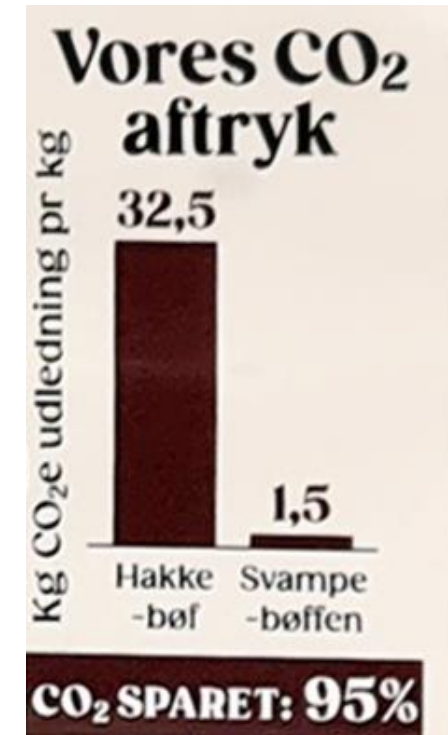


Veg Cordon Vert - Low Carbon Footprint  
France – August 2024

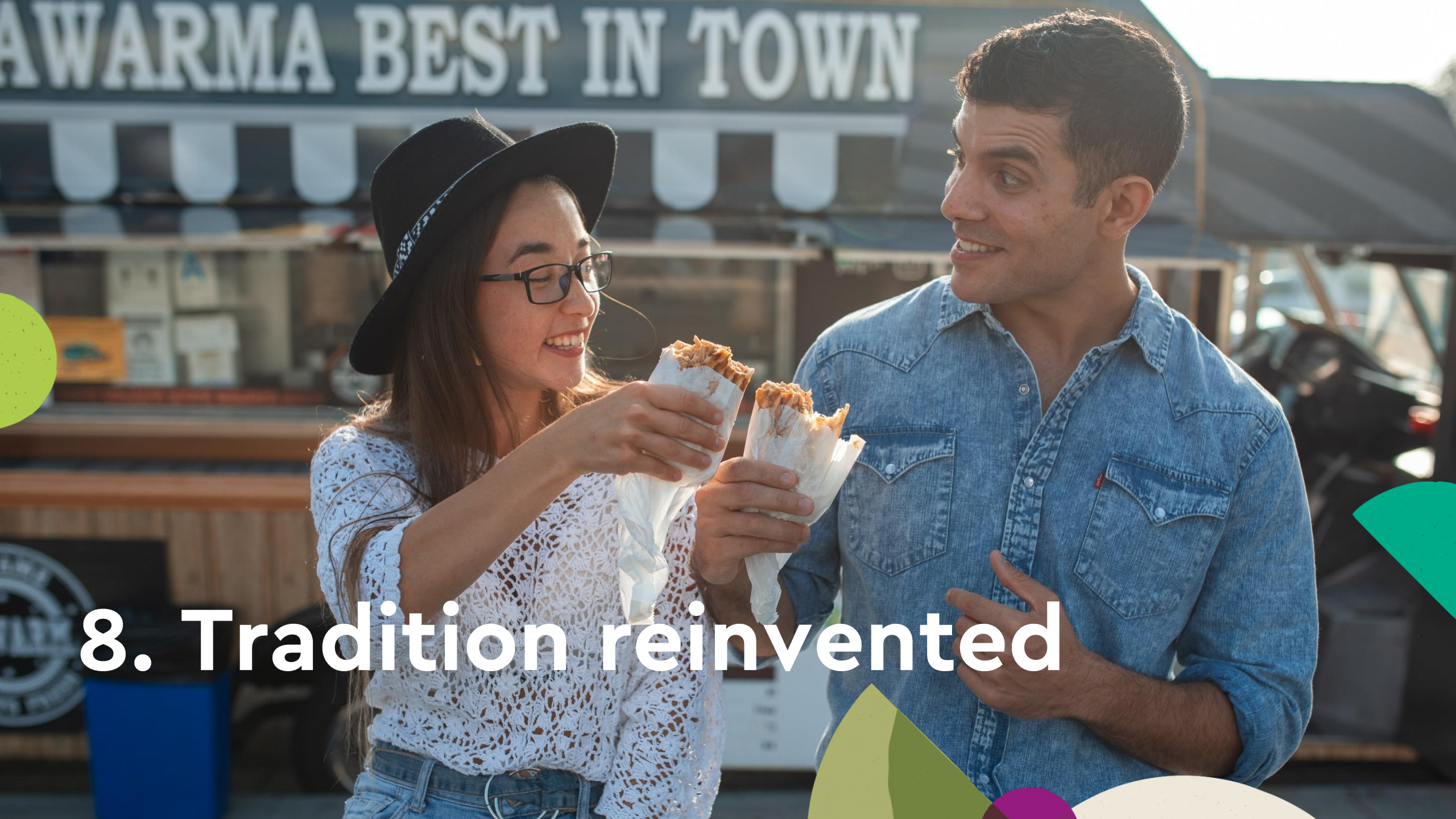


Perfect Season Svampe Bøffen:  
Mushroom Steaks  
Bilka, Denmark – August 2024

Back of pack







AWARMA BEST IN TOWN

## 8. Tradition reinvented



# Trend 8. Tradition Reinvented

authenticity

vintage

heritage

In a world that's constantly evolving, consumers wish to rediscover the flavors of their culinary heritage, embracing authenticity and tradition

Nearly **1 in 2** consumers globally find the following values important in their diet

## "My tradition"

Food that express my heritage

hand-finished



Handmade like grandma made it. Every cake is full of love and passion.

Germany, Jul 2024



## Your tradition

Diversity of food cultures



"This butternut squash pasta sauce is made in Italy and **based on a traditional recipe**, with **beautifully authentic flavors** of earthy squash, rich Italian cheese, herbs and spices."

United States, Sep 2024

**Sources:** Innova Database, Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US),

RUF

**Note:** Q: To what extent are the following values important to you in your diet? (Responses for tradition and diversity)





# Leveraging tradition to connect to the nostalgic consumer

65%

"I would like to see more of the  
**old and traditional recipes**  
appear on supermarket shelves"

vs.

"I would like to try some  
**new products with old or  
traditional** recipe-inspired flavors"

64%

**Traditional recipe**  
Premium quality.  
100% natural.



India, Aug 2024



**Sources:** Innova Database, Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US),  
M&M's

**Note:** Q: To what extent do you agree with the following statements?

# Various suppliers of meat substitutes are responding to this trend



Mortadella Klassik  
Edeka, Germany – November 2024



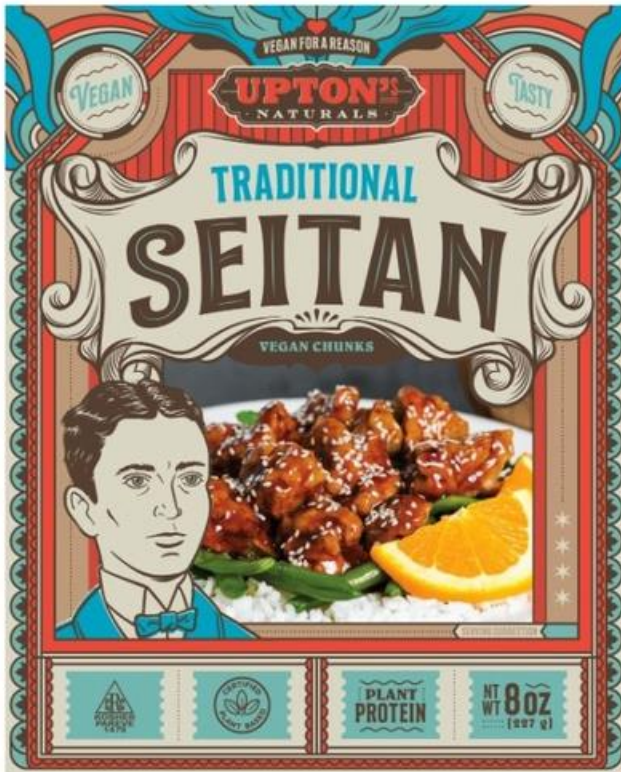
The Levantine Table "Flavours of the Middle East" Spinach Falafels  
Waitrose, UK – September 2024



TSP with Authentic Sri Lankan Spice Mix  
Aprico Super Centre, Sri Lanka – November 2024



Using terms such as *original*, *traditional*, *classic* and *authentic*



Traditional Seitan  
US – January 2024



Original Breakfast Saus'ge  
Philippines – October 2024



Burgers Originali  
Italy – October 2024





# 10. Bytes to Bites: AI & Food



# Companies start to identify the possibilities that artificial intelligence can offer

## Food safety

AI-based electronic tongue to advance food safety by detecting fruit juice and milk spoilage



October 10, 2024

## Flavor Innovation

Puratos harnesses AI to unlock tomorrow's tastes and elevate food innovation



September 19, 2024



Powered  
by AI

## Wellness

AI drives Ingredion's beverage sweetener innovation as consumers shift toward "sophisticated blends"



Ingredion



August 27, 2024

## Sustainability

M&S to trial autonomously farmed parsnips to reduce carbon and improve crop quality



M&S

October 8, 2024

Sources: [Food Ingredients First](#), [Food Ingredients First](#), [Food Ingredients First](#), [Food Ingredients First](#)



# Meat substitutes by Chat GPT




Plant-Based product of the future  
created by AI



Plant-Based product of the future  
created by AI



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 small amount of food on the fork. The background is blurred, showing other tables and chairs. There are decorative overlays: a large green circle in the top right, a smaller green circle in the bottom left, and a teal shape on the right side. The word "Wrap-up" is written in white, bold, sans-serif font across the lower part of the image.

**Wrap-up**



# Wrap-up

- Innova Market Insights has unveiled the Top 10 Food & Beverage Trends for 2025, emphasizing quality, health, sustainability, and innovation.
- Consumers are increasingly demanding higher quality ingredients, seeking personalized nutrition, and showing a growing preference for plant-based products that are not only sustainable but also of exceptional quality.
- Businesses must adapt to these evolving consumer preferences.
- Schouten responds to these trends by developing products that meet the demand for tasty, natural, healthy, and sustainable alternatives.
- Together with our suppliers, customers, and other partners, we work tirelessly every day to take the meat alternatives category to the next stage of growth.



# schouten

specialist in  
plant-based protein

Questions? Please feel free to contact us:

**Mark van Noorloos**

Marketing Manager

T: +31 (0) 183 44 63 73  
[mvnoorloos@schoutenfood.com](mailto:mvnoorloos@schoutenfood.com)  
[www.schoutenfood.com](http://www.schoutenfood.com)





# Disclaimer

The information in this trend analysis has been compiled with the utmost care by Schouten Europe B.V. based on available data and reliable sources. While we strive to provide accurate and up-to-date information, we cannot guarantee that all information is completely correct or up to date. The insights and forecasts presented are based on the interpretation of the information available at the time of publication and may be subject to change.

Schouten Europe B.V. accepts no responsibility for any damage or loss resulting directly or indirectly from the use of the information contained in this trend analysis. The content is for informational purposes only and does not constitute advice or a recommendation for specific decisions or actions.

Use of this Trend Analysis is at your own risk. Schouten Europe B.V. reserves the right to make changes to the contents of this publication at any time without prior notice.