



schouten specialist in
plant-based protein

European plant-based
meat market developments

Based on the latest GFI Europe and Circana retail data

 Circana.  / Europe

Plant-based meat alternatives in Europe

Retail sales volumes of plant-based foods are growing in France, Germany, Italy and Spain, with cheaper private-label products driving much of the increase. [Source](#)

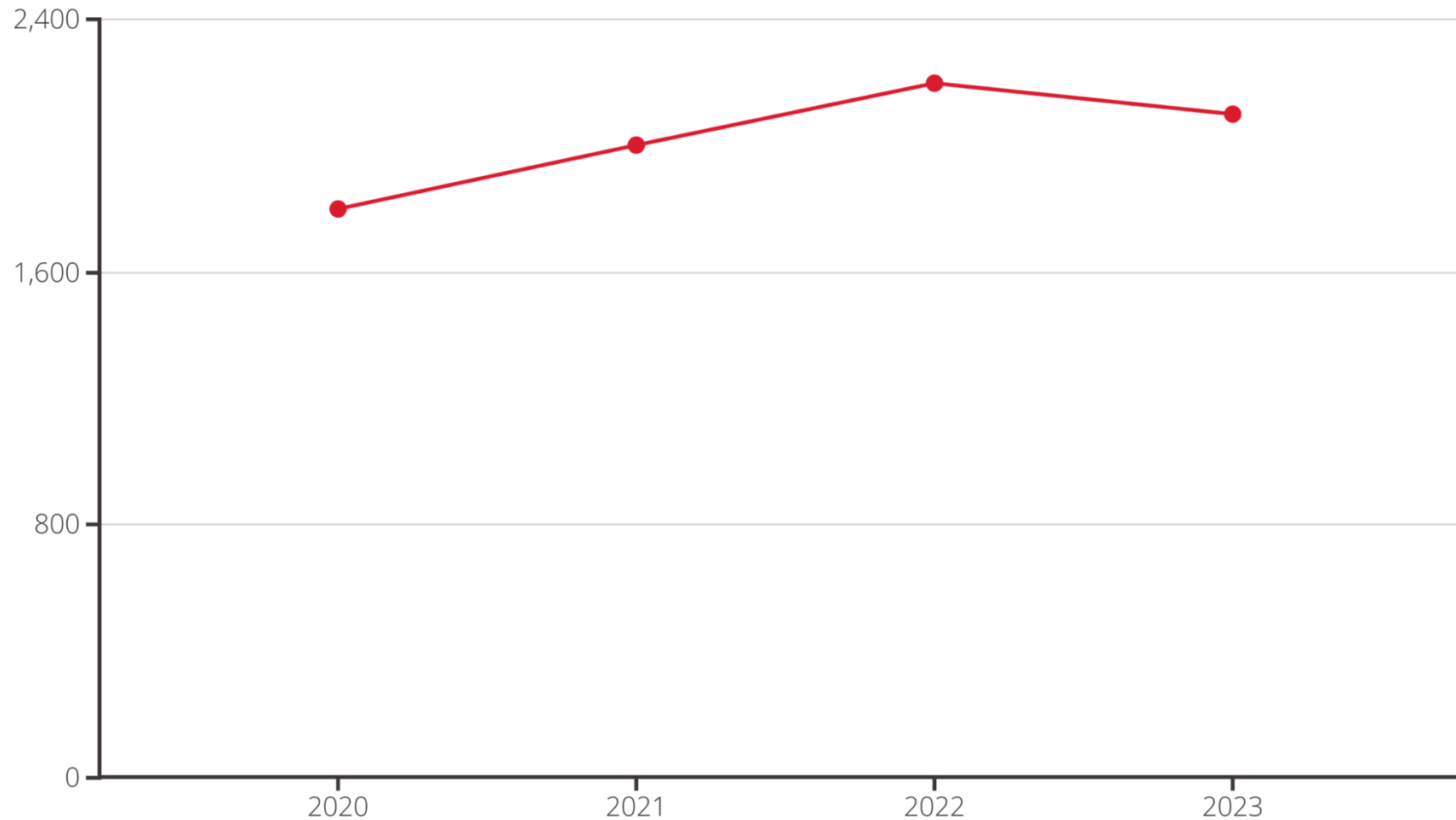
In the following slides, we **focus on plant-based meat alternatives**: products designed to mimic the taste, texture and culinary experience of animal meat while being made entirely from plant ingredients.

These alternatives play a crucial role in the protein transition by:

- Reducing environmental impact of food production
- Addressing animal welfare concerns
- Providing protein-rich options for flexitarians



European market development plant-based meat alternatives



After steady growth from 2020-2022, the European plant-based meat market experienced a slight decline in 2023, reflecting challenges in consumer retention and price sensitivity.



Household penetration by country



37%

Germany

Highest adoption rate in Europe with strong distribution across retail channels



33%

United Kingdom

Strong early adopter market with established plant-based brands



28%

Netherlands

Growing market with increasing consumer interest in protein alternatives

While household penetration remains strong, purchase frequency has stabilized or slightly decreased in most markets during 2023.

Price developments & private label growth

Price Trends

- Average price per kg increased 8-12% from 2020-2023
- Inflation has widened the price gap with conventional meat
- Price remains a key barrier to broader adoption

Private Label Expansion

- Private label share grew from 25% to 38% (2020-2023)
- Lidl's Vemondo line achieved price parity with animal meat
- Strongest growth in DE, FR, IT, and ES markets



Country comparison: market size & growth

Germany: €2.2 Billion



- Largest European market with continued growth despite 2023 slowdown
- Strong distribution across discount and mainstream retail.

UK: €1.8 Billion



- Second largest market showing slight contraction (-2%) in 2023
- Challenges with repeat purchases and value perception

France: €0.9 Billion



- Growing market (+5% in 2023) with increasing mainstream acceptance
- Strong performance in hypermarkets and specialty stores

Market growth correlates strongly with retail distribution breadth and price positioning relative to conventional meat.

Popular product formats

Burgers

Most established format with 42% market share

Highest consumer satisfaction ratings

Burgers

Mince

Mince

25% market share with growing popularity

Valued for versatility in cooking applications

Sausages

15% market share with seasonal popularity

Strong performance during summer grilling season

Sausages

Nuggets

Nuggets

18% market share with strong appeal to families

Highest growth rate among all formats

Consumer preference is shifting toward versatile formats that integrate easily into everyday meals.



Challenges and opportunities

Key challenges

- Price premium vs. conventional meat (30-50% higher)
- Taste and texture satisfaction for repeat purchases
- Consumer confusion about nutritional benefits

Growth opportunities

- R&D investment in improved taste and texture
- Price reduction through scale and innovation
- Retail partnerships for improved positioning



This is the moment to team up with a partner who knows what it takes

- A partner who collaborates, empathizes with your challenges, and helps you realize your goals.



Why Schouten can help you

- 1. Over 35 years of expertise in plant-based proteins**
A pioneer since 1990 – deep knowledge of product development and consumer trends.
- 2. Strong R&D focus with proven innovations**
Continuous improvement in taste, texture, and nutritional value.
- 3. Flexible production & tailor-made solutions**
From private label to co-creation: scalable, efficient, and fast to market.
- 4. International network & reliable supply chain**
Active in over 50 countries – strong logistics and global partnerships.
- 5. Collaboration based on transparency and trust**
A true partnership approach: we think along, build together, and share success.

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Plant-based meat market





Thank you for your attention
Don't hesitate to contact us