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Consumer Insights »meat substitutes

Q4 2025 – The role of sustainability

Introduction

- More and more people are thinking about what they eat and what it means for the planet.
- Sustainability also plays an important role in meat alternatives: how products are made and what impact they have on the environment, such as lower CO_2 emissions or reduced water use.
- Central question in this presentation: **To what extent does sustainability influence consumer choices when it comes to meat substitutes?**

Why meat substitutes?

- Worldwide, livestock farming is responsible for around 14.5% of all greenhouse gas emissions.
- Producing meat requires large amounts of land, water, and animal feed.
- Governments and companies are therefore promoting a "protein transition": more plant-based proteins, less animal-based.
- **Meat alternatives play an important role in this transition.** On average, meat alternatives have **70–90% lower environmental impact** than meat.

Sources:

- FAO (2013)
- Rijksoverheid – Nationale Eiwitstrategie (2022)
- GFI: Plant-based vs. animal-based meats: A life cycle assessment

What sustainability means in this presentation?

- We're not talking about the idea that people buy meat alternatives because they're better for the environment.
- Here, we focus on **how sustainability is communicated on packaging**, through logos, claims, and messages.
- This connects to the Innova Market Insights 2025 trend "Climate Adaptation", which we discussed earlier in this update.

Trend: Climate adaptation

Due to climate change, both companies and consumers need to make smart choices. It's about adapting your lifestyle in a way that aligns with your values.

More and more packaging draws attention to climate benefits

''Your purchase supports the Nabu Climate Fund''

REWE, Germany – May 2025

"Climate footprint 1.4 kg CO2e per kg"

Denmark – February 2025

Billa Dino Nuggets "Together for climate strength''

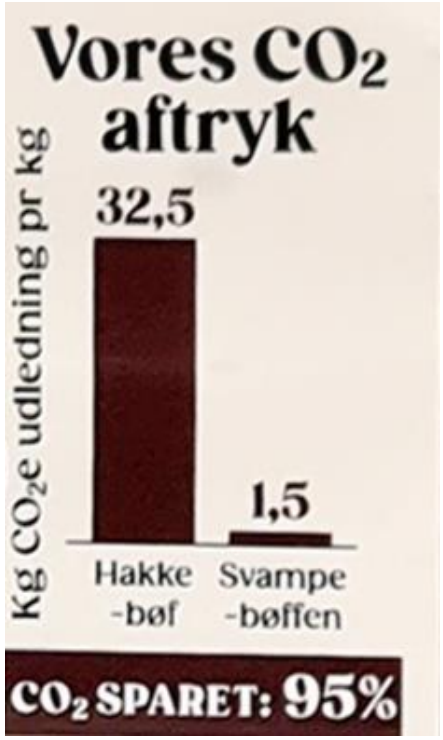
Austria – February 2025

From “small footprint” to specific CO_2 data

Veg Cordon Vert –
Low CO_2 emissions
France – August 2024

Bottom label

Perfect Season Svampe Boffen:
Champignonsteaks
Bilka, Denmark – August 2025

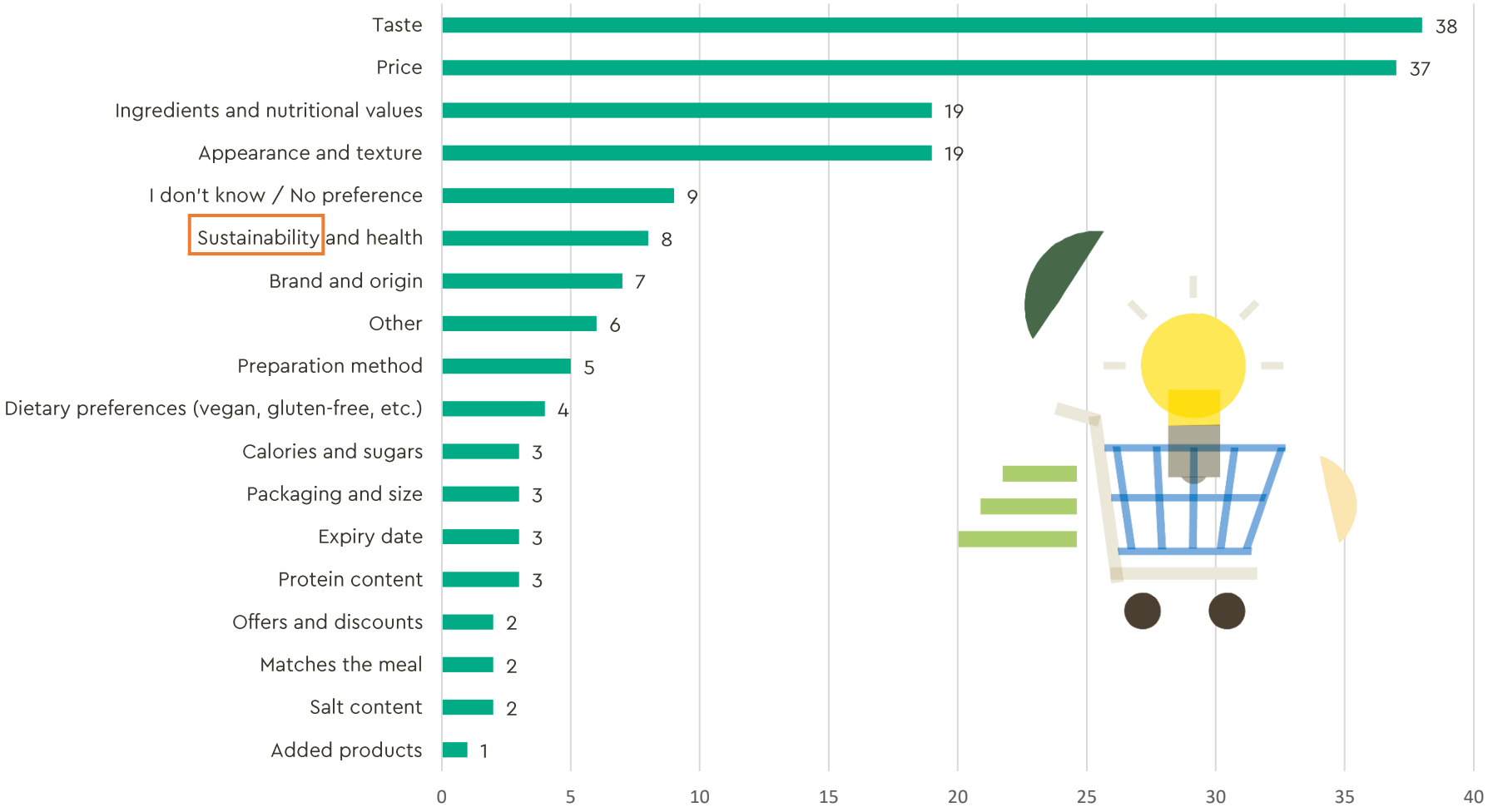


You save 95%
CO_2 emissions
with this choice.

Source:
Markteffect
Research is Everything

Meat Alternatives Monitor 2024 – What do you pay attention to when choosing a meat alternative?

Sustainability matters, but it's not the key reason for choosing.



- Only 8% of respondents say they pay attention to sustainability aspects when choosing a meat alternative.

→ Percentages %

The *value action gap* plays a role

- Many consumers say that the environment, climate, and animal welfare are important factors in their food choices.
- However, there is often a gap between what consumers say they want ("I want to choose sustainably") and what they actually buy. This is often referred to as the **value action gap** or attitude behaviour gap.
- Perceiving sustainability communication on the packaging of a meat substitute does not necessarily mean that the consumer prefers this product over another one without such communication.

Sources:

- Frontiers – Understanding consumer choices in plant-based meat alternatives (2023)
- EU-research – Enabling sustainable plant-forward transition (2022)

Sustainability can only play a role once the basic conditions are met

- Basic conditions such as taste, price, and availability need to be right before sustainability claims can play a role.
- Consumers are only willing to buy a product more often if it tastes good.
- Negative experiences with taste or texture lead to rejection, regardless of any sustainability claims.
- Price also plays a major role: when meat alternatives are more expensive than meat, it becomes a barrier.
- Consumers need to be able to choose meat alternatives easily within their familiar food environment.

Sources:

- Data Insights Network – Sensorisch onderzoek vleesvervangers (2023)
- Frontiers – Understanding consumer choices in plant-based meat alternatives (2023)

Sustainability labels and communication

- Consumers respond positively to clear quality marks and CO_2 labels.
- Transparency is crucial: vague claims or "greenwashing" undermine trust.
- Simple, visual information works better than technical details.
- Labels increase awareness, but they don't automatically lead to purchase if price or taste disappoint.
- Communication about sustainability works best when it is concrete and personally relevant. For example, "less CO_2 per meal" rather than "sustainably produced."

Example of sustainability messaging

Database Innova Market Insights (May '25)

Sources:

- Furia (2018) – Van Vlees naar Vervanger (thesis, EUR)
- PMC – Is sustainable consumption a motivator for meat alternatives? (2024)

Main barriers

- Some consumers see meat alternatives as "**highly processed**," which reduces their perceived sustainability value.
- There is still a common **perception** that meat alternatives are **more expensive** than meat, creating barriers to wider adoption.
- Meat is still viewed as the standard and an important part of a meal.
- Some **consumers don't know how** to prepare meat alternatives and have **limited knowledge** of their environmental and health benefits.

Only 41% of Dutch consumers believe that vegetarian or vegan options are better for the environment than meat.
MarketEffect – Dutch Meat Alternatives Monitor 2025

Sources:
- PMC – Meat consumption, sustainability and alternatives (2023)
- Frontiers (2023)


KAAS
Garden Gourmet
SPINAZIE-KAAS RUNDO
ESCALOPE ÉPINARDS-FROMAGE
GRIEKSE RUNDO
ESCALOPE À LA GRECQUE
ORIENTE SCHAL
ESCALOPE AUX LÉGUMES
LEKKER VEGGIE
KAASSCHNITZEL
CORDON BLEU
NOTENBURGER
GROENTE SCHIJF
PLUIMFEEST BURGER
BOFKIPBURGER
JUMBO

Opportunities to influence behaviour

- Place meat alternatives more prominently in supermarkets or include them as the standard option on menus.
- Make meat alternatives cheaper than meat and communicate this clearly.
- Connect sustainability to positive emotions, stories, and experiences. Make it concrete and personally relevant.
- Focus on taste and enjoyment, and highlight sustainability as an added value.

Sources:

- PMC (2024)
- Oxford Academic – Sustainability trade-offs in animal husbandry (2023)

Summary of insights

- **Sustainability** plays a role in consumer choice behaviour, but **rarely** as **the most important factor**.
- For most consumers, taste, price, and convenience weigh more heavily.
- Communication about sustainability works best when it is concrete and personally relevant.
- Effective strategies **combine sustainability with attractive product features and smart communication** that removes barriers.

Sources:

- Ipsos (2023)
- Markteffect (2023)
- Frontiers (2023)

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