

MEAT SUBSTITUTES – 2022 – GERMANY

Meat substitutes are set for long-term growth as the meat reduction trend continues and people focus more on their own and the planet's health.



A Mintel Analyst, Global Analyst



Meat Substitutes – 2022 – Germany

This report looks at the following areas:

- The impact of COVID-19 on consumption and sales of meat substitutes
- How consumers' meat substitute usage has increased since 2020
- Benefits associated with eating less meat and consumers' choice factors when buying meat substitutes
- How launch activity reflects consumer demand, especially for ethical and environmentally friendly products



Meat substitutes are set for long-term growth as the meat reduction trend continues and people focus more on their own and the planet's health.

Overview

For consumers who can't yet envision meatless burgers on their plates, **plant-based prepared meals can serve as a safe and convenient introductory format**. This offers a great opportunity, as **75% of meat alternative buyers/eaters** say more choice of ready meals based on meat substitutes is appealing.

Meat substitutes benefited in 2020 from a rise in the number of meals consumed at home since the beginning of the COVID-19 outbreak **with a 65% increase in retail value sales in 2020**. This added to the benefit that meat substitutes were already enjoying thanks to the meat-reduction trend.

With **50% of non-users** perceiving meat substitutes as overpriced, **including more pulses or vegetables can be an attractive lower-cost option**. Brands can use this to their advantage as **27% of meat substitute buyers** look for a low price.

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Focusing on meat substitutes' environmental benefits and **communicating tangibly how these products contribute to the health of the planet** represents a great opportunity for the market. Indeed, more than **half of Germans (54%) want to eat less meat because it is better for the environment.**

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview

The impact of COVID-19 on meat substitutes

- The pandemic fuels demand for meat substitutes
- COVID-19's impact on meat substitutes and German consumer behaviour

Market context

- Almost half of meat substitute eaters consume products at least once a week
 - Graph 1: frequency of consuming meat substitutes in the last six months, 2021
- Increased focus on environment and health elevates meat substitute sales

Mintel predicts

- Both value and volume retail sales of meat substitutes will double by 2026
- Market size & forecast following the COVID-19 outbreak
- Meat substitutes retail value sales will almost double from 2021-26

Opportunities

- Make meat alternatives more meat-like through taste and texture
- Highlight healthy attributes of meat substitutes
- Innovate more fish substitutes
- Offer more choice of ready meals with meat alternatives
- Appeal to consumers who want to replace meat with vegetables and pulses

The competitive landscape

- Brands maintain the majority share of meat substitutes sales
 - Graph 2: company retail market share of meat substitutes, by value, 2020
- Quick download resources

MARKET DRIVERS

- COVID-19: market context
- The impact of COVID-19 on the German economy
 - Graph 3: key economic data, in real terms, 2019-23
- Consumers have a greater awareness about planetary health
- Most consumers say they consider the environmental impact in their decisions

Meat Substitutes – 2022 – Germany

- The meat reduction trend fuels demand for meat substitutes
- Demand for minimally processed products is a challenge for the meat substitutes market

WHAT CONSUMERS WANT AND WHY

Usage of meat substitutes

- Meat substitute ingredients and ready-to-eat products are top meat-free items eaten
 - Graph 4: formats of meat substitutes eaten in the last six months, 2021
- The number of meat substitute types eaten are relatively limited
 - Graph 5: number of meat substitutes types eaten in the last six months, by age, 2021
- Increase frequency through specific meal occasions
 - Graph 6: frequency of consuming meat substitutes in the last six months, 2021

Benefits associated with eating less meat

- More than half of Germans believe that reducing meat consumption is better for the environment
 - Graph 7: benefits associated with eating less meat, 2020 vs 2021
- Environmental concerns move into focus when reducing meat consumption
- Seven in 10 Germans aged 16-24 eat less meat for the environment
- Greenforce offers carbon neutral meat subs
- "Feel-good factor" when cutting meat to support the environment and in terms of health

Choice factors among shoppers of meat substitutes

- Vegan meat substitutes that closely resemble meat are most wanted
- Popular meat brands offering meaty vegan options
- Meat substitutes need to closely resemble meat's texture and taste
- Highlight overall healthy attributes of meat substitutes
- Interest in meat alternatives that are fortified with vitamins and minerals
- Growing demand for exciting flavours among Germans
- One in four meat alternative buyers want environmentally friendly packaging

Non-users' behaviours related to meat substitutes

- Providing more meat-like alternatives to appeal to Germans
 - Graph 8: behaviours related to meat substitutes among non-users, 2021
- Both users and non-users want meat substitute ingredients to be sustainably sourced
- Linking sustainability to transparency with eco-scoring systems

User and buyer behaviours related to meat substitutes

- Plant-based ready meals are an easy introductory format for people trying to reduce their meat intake
 - Graph 9: behaviours related to meat substitutes among users, 2021
- Three in four eaters/buyers want more choice of ready meals with meat alternatives

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- Concerns about sea fishing fuels demand for fish substitutes

Attitudes towards meat substitutes

- Various barriers to address across meat substitutes
 - Graph 10: attitudes towards meat substitutes, 2021
- Appeal to consumers who want to replace meat with vegetables and pulses
- International inspiration: veggie-based meat substitutes
- Blends for flexitarians: mixing meat with vegetables
- Tackle consumer concerns about meat substitutes' processed image
- Food for Future by Penny visualises the naturalness of ingredients on pack

LAUNCH ACTIVITY AND INNOVATION

- Private labels keep growing meat substitute NPD
- Vegan private-label launches continue to climb
- Vegan butcheries offer an untapped opportunity for retailers on a large scale
- 'Snackification' could drive growth
- Expand the range of plant-based fish/seafood substitutes
 - Graph 11: meat substitutes NPD with 'fish' flavour, 2018-21
- More launches seen in fish and seafood alternatives
- Ethical & environmental claims gain traction
 - Graph 12: meat substitutes NPD by top five claim categories, 2018-21
- Rise in 'all-natural' NPD
- Plant-based claims see a jump
- Calling out 'plant-based'
- Explore alternative base ingredients to soy
- Jackfruit as an ingredient for meat substitutes

Advertising and marketing activity

- Just a pea – no animals or humans harmed!
- Mixing your own vegan meat with Greenforce
- Meat made from plants from Rügenwalder Mühle

MARKET SHARE

- Brands maintain the majority market share of meat substitutes

Retail market share of meat substitutes, by value, 2019-20

- Rügenwalder Mühle is again market leader

Retail market share of meat substitutes, by volume, 2019-20

- Strongest increase seen for own label meat alternatives

MARKET SIZE, SEGMENTATION AND FORECAST

Retail value and volume sales and forecast of meat substitutes, 2016-26

- Focus on sustainability and health for sales growth
- Meat substitute value sales projected to grow by 87%...
- ...and volume by 66% over 2021-26

Retail sales of meat substitutes, by type, 2019-20

- Meat preparations see exceptional growth in value...
- ...and volume terms

Retail sales of meat substitutes, by format, 2019-20

- Both value and volume recorded growth across frozen formats

APPENDIX

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

Appendix – market size and central forecast methodology

- Forecast methodology
- Forecast methodology – fan chart
- Market size and forecast – meat substitute – value
- Market size and forecast – meat substitute – volume
- Market forecast and prediction intervals – value
- Market forecast and prediction intervals – volume

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