

THE FUTURE OF ANIMAL PROTEINS, MEAT ALTERNATIVES: 2020

Global Annual Review: what's now and what's next for the meat, poultry, fish and meat alternatives markets.



A Mintel Analyst, Global Analyst



Report Content

- A look back, and a look ahead

THE BIG STORIES

- Mintel's perspective

Crowded market for meat alternatives

- Meat alternatives innovation focuses on replicating meat staples
- New formats stand out in the plant-based alternatives market
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- Pea protein takes off in meat substitutes
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Meat companies navigate a rising tide of challenges

- Plant-based alternatives are aiming high, but consumers are not giving up animal products
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- Animal protein brands can double down on protein message
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- Meat companies are diversifying their portfolios
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- Blended products help meat giants to dip their toe into plant-based

Environmental concerns come to the forefront

- Global interest in sustainable nutrition prompts new innovation
 - Graph 1: ethical & environmental claims* in meat, fish, poultry and meat substitutes, Jan 2017-Dec 2019
- Meat companies invest in "climate-friendly" initiatives and products
- Plant-based meats showcase their impact to strengthen environmental positioning
- Plant-based meats showcase their impact to strengthen environmental positioning

IN THE NEXT TWO YEARS

- Mintel's perspective

Meat alternatives fine tune health and value

- Address meat alternatives' "processed food" stigma
- Cultured meat will force plant-based alternatives to improve the taste and texture
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The Future of Animal Proteins, Meat Alternatives: 2020

- Seafood alternatives will be positioned as a marine conservation solution
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Shifting global landscape puts a spotlight on Asia

- All eyes on APAC as China becomes the target market for plant-based alternatives
- African Swine Fever boosts demand for other proteins
- Pork shortage and sustainability concerns will increase reliance on trim

Water and air pollution will be the key environmental issues to address

- Environmental concerns prompt corporations to become the agents of change
- Water scarcity and purity will be a more pressing global issue
- Water scarcity and purity will be a more pressing global issue
- Air pollution is another focus area

IN FIVE YEARS AND BEYOND

- Mintel's perspective
- Expect "less but better" approach to meat from animals
- Synthetic biology will be used in new categories
- Questions will surface about ethical and environmental attributes of cultured meat

KEY MARKET DATA

- Meat, poultry, fish and meat alternatives innovation
 - Graph 2: % of launches of meat, poultry, fish and meat substitutes within each region, 2019
- South Korea enters the top five in meat and poultry launches, edging out Canada
- UK outpaces France as Canada and US ramp up meat substitutes innovation to enter the top five
 - Graph 3: meat substitute product launches, top five countries, 2019
- US loses the lead in fish product launches to France and Germany
 - Graph 4: fish product launches, top five countries, 2019
- Fastest growth in processed meat is coming from Asia, slowest from Europe and Australia
- India and Indonesia see double-digit growth in processed fish market

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