

# Alternative proteins: Where we are, where we're headed

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A brief look at what's on the market and what consumers say about alternative proteins.



# Experts in what consumers want and why



## Trends

Mintel is a world leader in trend spotting and market predictions with observers and analysts covering 35 markets.



## Consumers

Mintel conducts primary research with 40,000 consumers around the world every month.



## Analysts

Mintel has 200 global category, consumer and functional analysts.



## Products

Mintel purchases 1,500 new products, in 86 markets, every day.



## Menu Insights

Mintel collects thousands of US menus every year to track trends in the menu optimization, flavors, ingredients and preparation.

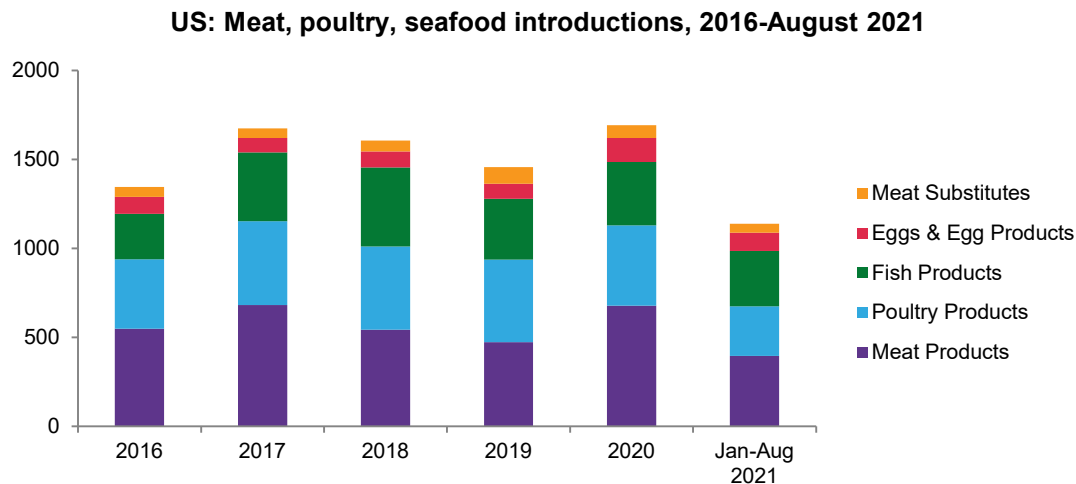


## Consulting

Mintel strategists provide custom problem solving and actionable advisory.

# Meat substitutes make up a small portion of protein introductions

Not surprisingly, meat and poultry drives new product introductions in this category, while meat substitutes accounts for a small portion of the total. What this does not show, however, is how the types of meat substitutes have shifted in recent years, to include products that truly do mimic the taste of animal protein.

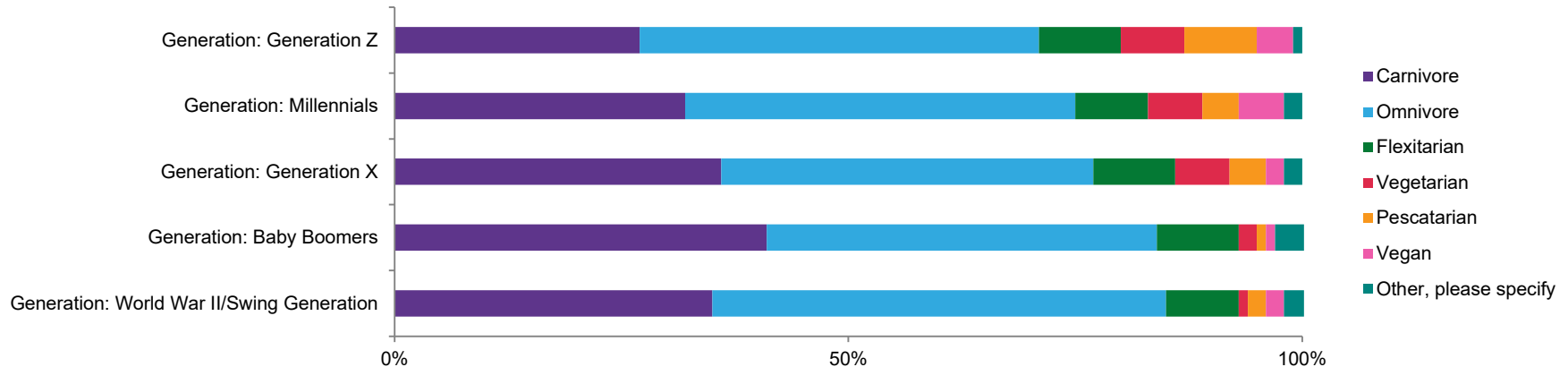




# More than half of consumers eat all types of proteins

Although few consumers say they are vegan or vegetarian, more younger consumers say they don't eat animal protein and fewer say they are carnivores.

Which of the following dietary preferences best describes your eating habits?



Base: 2,000 internet users aged 18+

Source: [Lightspeed/Mintel](#)

## Brands entice flexitarians by mimicking meat



From the world's largest pork producer

[Pure Farmland Plant-Based Meatballs](#) are a plant-based soy protein product made with natural flavours and provides 15g of protein per serving (US).



Meaty plant goodness

[Worthington Plant Powered XBurger](#) is said to get its meaty goodness directly from clean, protein-rich plant sources, and the manufacturer claims to be committed to exceptional 100% plant-based foods (US).



ConAgra's Gardein expands into burgers

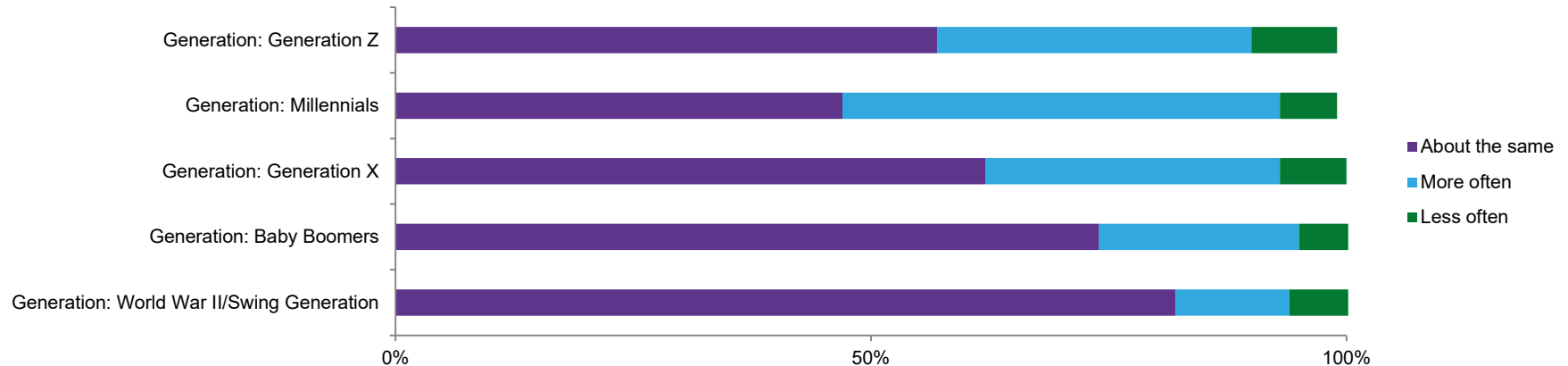
[Gardein Ultimate Plant-Based Burger](#) contains 19g of protein (pea protein) and comes in an 8-oz. 2-pack for \$4.19 (US).



# Millennials most likely to say they are increasing their plant-based protein consumption

Although older generations say they are consuming it about the same, their consumption level is fairly low.

**Compared to a year ago, are you eating plant-based proteins more, the same, or less often?**



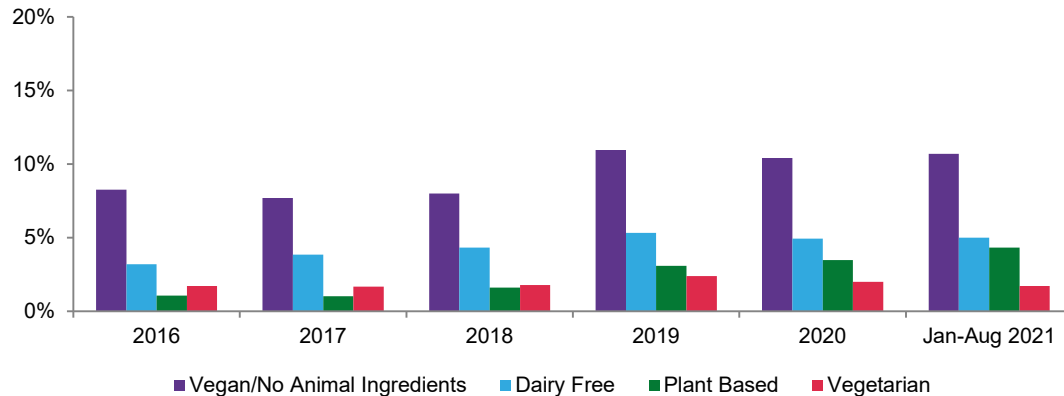
Base: 1,610 internet users aged 18+ who eat plant-based proteins

Source: [Lightspeed/Mintel](#)



# Vegan leads introductions, "plant-based" shows most growth

US: Food and beverage introductions with various claims, 2016-August 2021



Vegan claims comprise the most number of introductions, but those with a "plant based" descriptor tripled in five years. "Vegan" tells consumers exactly WHAT is in the product (or not in the product) while "plant-based" appeals to more of a lifestyle choice.



# Brands proudly boast about their plant-based ingredients



All about the vegetables

[Goya Black Bean Burger](#) features black beans and brown rice as the first two ingredients, with seasonings that drive home its Hispanic positioning (US).



"Summer garden in a burger"

[Dr. Praeger's Cauliflower Veggie Burgers](#) is made with six different vegetables, including cauliflower, peas, and zucchini (US).



Even pork rinds have plant-based alternatives

[Pig Out Texas BBQ Pigless Pork Rinds](#) is a 100% plant-based product that is made from rice and pea protein, with the crunch of traditional pork rinds (US).

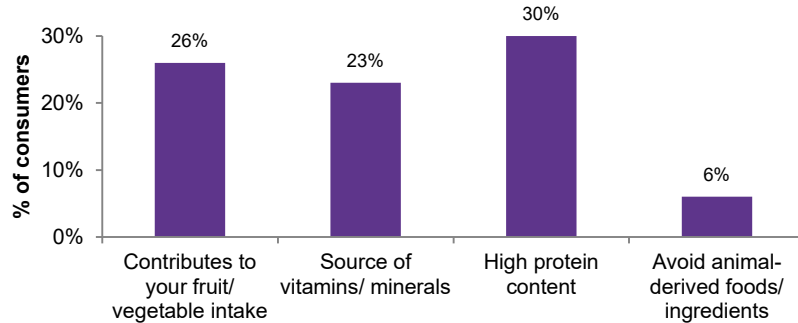




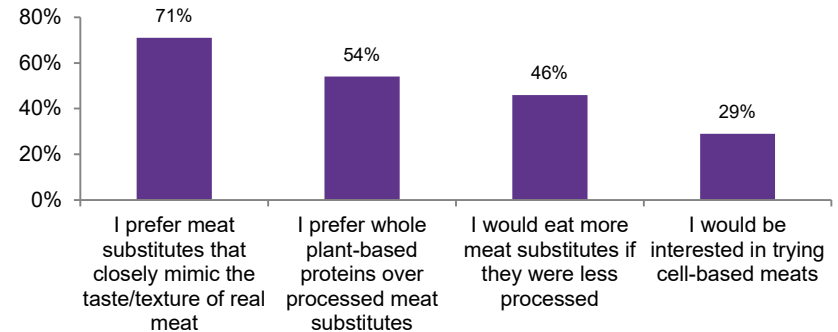
# Consumers look for "wholesome" formulations

Vitamins, vegetables, protein, in as many forms as possible.

**US: important factors when shopping for food, July 2020**



**US: Attitudes regarding proteins**



Base: 1,000 internet users aged 18+

Source: [Lightspeed/Mintel](#)

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# Brands work to deliver a seamless eating experience



Tradition with a twist

[Campbell Soup's Well Yes! Plant-Based Chick'n Noodle Soup](#) has all the goodness of traditional chicken noodle soup, but is made with plant-based chicken (US).



Dairy free is growing as well

[Boursin Dairy-Free Garlic & Herbs Cheese Spread Alternative](#) has the flavor and texture of the dairy-based brand, but is made with plant-based ingredients (US).



Made with a range of vegetables

[Good Catch Plant-Based New England Style Crab Cakes](#) are said to have a real seafood taste and a lump crabmeat-style texture and made with six plant-based ingredients (US).

## Meat substitutes may be at a crossroads



[Beyond Meat](#) is launching two burgers: 1) "meatiest" version to date, and 2) a "healthier" one

In an attempt to reach the mainstream consumer, meat substitutes brands are confronted with the decision on which direction to pursue - prioritizing a meat-like taste with a more indulgent eating experience or putting a greater emphasis on health and cleaning up the ingredient list.

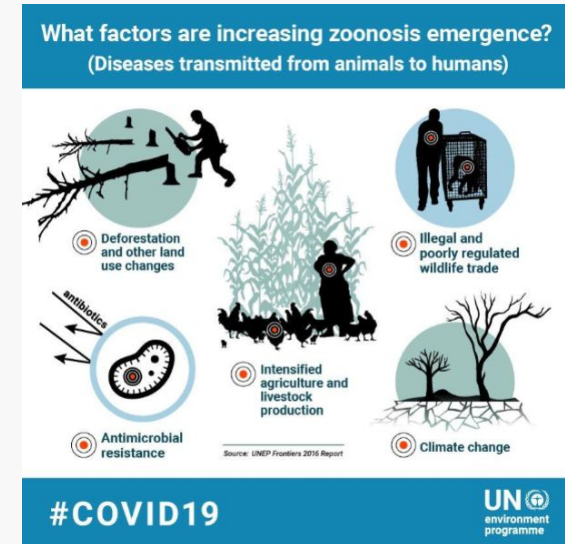
Reflecting on the need for improved taste *and* nutrition, Beyond Meat launched in May 2021 burgers and sausages with 35% less fat.

# COVID-19 has heightened the discussion

The [United Nations Environment programme \(UNEP\)](#), discusses how human action may have facilitated the emergence of zoonotic diseases like COVID-19.

Deforestation, climate change, antimicrobial resistance and intensified agriculture and livestock production are factors linked to the emergence of zoonotic\* disease.

Consumer concern about the link between foods of animal origin and these factors, coupled with concerns about the 'safety' of livestock production systems, could encourage consumers to review their protein choices, in favor of plants.



# Sustainable ingredients can help address environmental concerns



Mushrooms

Australian [Fable Food Co](#) uses minimally processed shiitake mushrooms (in addition to coconut oil, tapioca flour and soy sauce) to imitate braised pork and beef, and features in over 100 restaurants across Australia.



Kelp

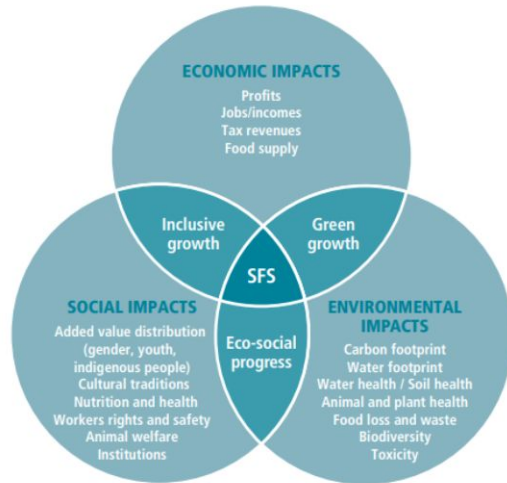
[Akua](#) launched three varieties of Kelp Jerky, containing 10g of protein per serving, and is now working on the first kelp burger: "kelp farming is a zero-input crop that requires no fresh water, fertilizer, feed or arid land to grow" (US).



Oats

Oats have become a sustainable hero ingredient in the dairy alternatives space and are bound to become more popular in meat substitutes. [Pulled Oats with Tomato](#) comprises a mix of oats, broad beans, peas, oil, tomato and herbs (Finland).

# The future: Leveraging all proteins to feed the world responsibly



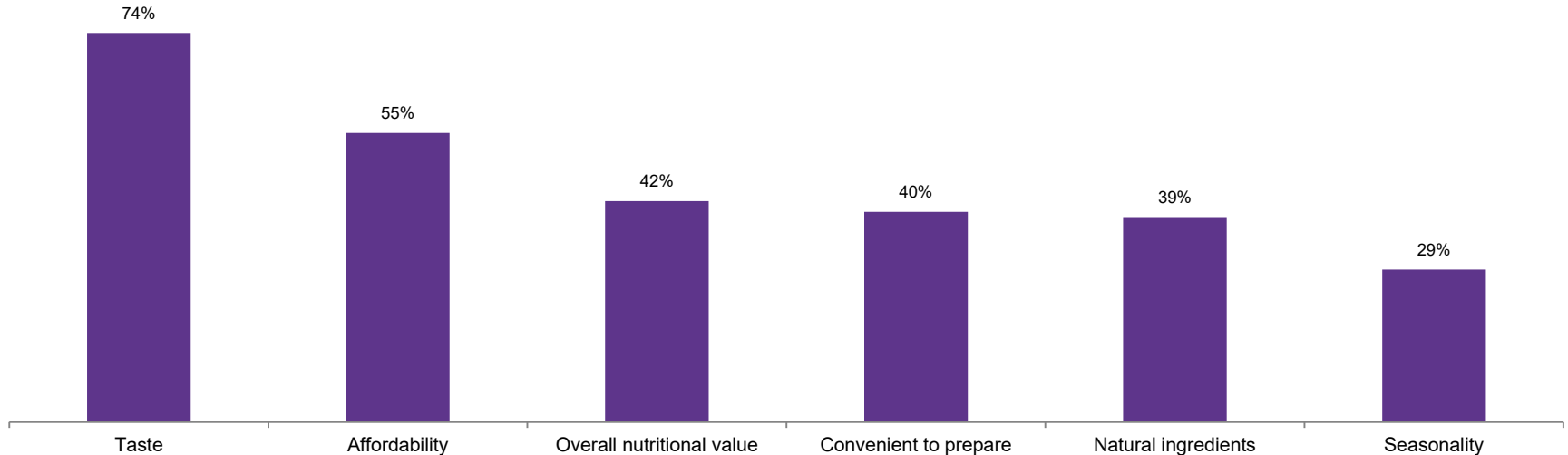
As we look into the future, there's a need to shift the conversation away from the "animal proteins vs plant-based meat substitutes" debate and toward meeting the needs of the growing global population through a combination of animal, plant, blended and cultured products in a way that is sustainable. This will include helping vulnerable populations - low-income consumers, children and the elderly - to gain access to nutrient-rich foods.

Sustainability in food systems - [FAO](#)



# Finally, keep in mind what is **MOST** important to consumers

US: Important considerations when choosing food & drink



Base: 2,000 internet users aged 18+

Source: [Lightspeed/Mintel](#)





Thank you!



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