

Cultured Meat Market - A Global and Regional Analysis, 2024-2033

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Abstracts

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Cultured Meat Market Overview:

The cultured meat market, which is expected to be valued at \$1,154.8 million in 2024, is anticipated to undergo substantial expansion, reaching an estimated \$3,810.6 million by 2033, supported by a robust CAGR of 14.19% from 2024 to 2033. Cultivated meat is anticipated to offer various advantages compared to traditional animal agriculture due to its more efficient production process. Preliminary life cycle assessments suggest that cultivated meat requires significantly fewer resources and has the potential to mitigate pollution and eutrophication associated with agriculture. According to a study, cultivated meat produced with renewable energy could decrease greenhouse gas emissions by up to 92% and reduce land use by up to 90% compared to conventional beef production. Moreover, the commercial production of cultivated meat is expected to be antibiotic-free, potentially resulting in fewer foodborne illnesses due to a reduced risk of exposure to enteric pathogens.

Introduction of Cultured Meat

The market study conducted by BIS Research considered the definition of cultured meat, also called cultivated meat, as authentic animal-derived meat, including seafood and organ meats, produced by directly cultivating animal cells. This innovative production approach eliminates the necessity of traditional animal farming for food. Cultivated meat comprises identical cell types arranged in comparable structures to animal tissues, thereby mimicking the sensory and nutritional characteristics found in conventional meat.

Market Introduction

The cultured meat market represents a groundbreaking shift in the food industry by introducing a novel method of meat production. Cultured meat, also known as lab-grown or cell-based meat, is created by cultivating animal cells in a controlled environment, eliminating the need for traditional livestock farming. This innovation aims to address sustainability, ethical, and environmental concerns associated with conventional meat production. As consumer awareness of these issues grows, the market is witnessing increased interest and investments. Although still in its early stages, the cultured meat market holds significant potential to reshape the future of sustainable and ethical protein consumption.

Industrial Impact

Cultured meat production significantly reduces the environmental footprint associated with traditional agriculture, mitigating issues such as deforestation, land use, and greenhouse gas emissions. By eliminating the need for large-scale animal farming, cultured meat addresses ethical concerns related to animal welfare, reducing the reliance on industrialized animal slaughter. The controlled environment of cultured meat production requires fewer resources such as land, water, and feed, contributing to greater resource efficiency compared to conventional meat production. The cultured meat sector drives innovation in biotechnology and food science, fostering advancements in cell culture techniques, bioengineering, and tissue engineering, with potential spillover effects into other scientific domains. The emergence of cultured meat necessitates the development of regulatory frameworks. Governments and regulatory bodies are navigating uncharted territory to ensure safety, labeling, and compliance standards.

The key players operating in the cultured meat market include Mosa Meat, UPSIDE Foods, Aleph Farms, Mission Barns, Air Protein, BlueNalu, Meatable, SuperMeat, GOOD Meat, Finless Foods, CUBIQ FOODS, Believer Meats, Redefine Meat Ltd., Vow Group Pty Ltd, and Shiok Meats Pte Ltd, among others. These companies are focusing on strategic partnerships, collaborations, and product launches to enhance their product offerings and expand their market presence.

Market Segmentation:

Segmentation 1: by Distribution Channel

Food Service and Fast Food Chains

Retail

Food Service and Fast Food Chains to Dominate the Cultured Meat Market (by Distribution Channel)

The food service and fast food chains segment is expected to undergo a transformative shift, with companies such as Believer Meats and UPSIDE Foods at the forefront of cultured meat innovation. Believer Meats, based in Israel, secured \$347 million in its Series B round in 2021, leveraging non-genetically modified organism (GMO) technology to achieve higher-density cell cultures efficiently. Meanwhile, UPSIDE Foods, having received FDA approval for its cultivated chicken, is scaling up operations with a pilot facility in the U.S. and plans for a commercial-scale facility, embodying a significant paradigm shift in sustainable and ethical protein production. In December 2022, Believer Meats announced a \$123.35 million investment in North Carolina, establishing a cutting-edge facility with proprietary bioreactors for high-density cell production. With a mission to make its products globally preferred through affordability, approachability, and availability, Believer Meats is strategically entering the food service sector first, emphasizing taste, competitive pricing, and convenience to drive widespread adoption of cultured meat.

Segmentation 2: by Product Type

Poultry

Beef

Seafood

Pork

Others

Poultry to Dominate the Cultured Meat Market (by Product Type)

The poultry segment is expected to witness a significant shift toward prominence, and

companies such as Eat Just and Future Meat are at the forefront of this transformation. Eat Just has made notable strides with its chicken product, available in Singapore, consisting of over 70% cultured cells and minimal addition of plant protein for structural integrity. This exemplifies a successful fusion of advanced cellular agriculture techniques with plant-based elements, contributing to both sustainability and consumer acceptance. Similarly, Future Meat in Israel has adopted a strategic approach, utilizing a combination of cultivated fat and plant protein in its cultured poultry products. These innovative methods showcase a commitment to creating environment-friendly and health-conscious alternatives and positioning poultry-based cultured meats as a dominating force in the future market landscape. The success stories of Eat Just and Future Meat underscore a broader industry trend where companies are leveraging technological advancements to craft cultured poultry products that align with consumer preferences for both taste and sustainability. As these pioneers continue to refine their methodologies and expand their product offerings, the trajectory of the cultured meat market, especially in the poultry segment, appears poised for sustained growth and eventual market dominance.

Segmentation 3: by Region

North America: U.S. and Canada

Europe: Germany, Spain, Netherlands, U.K., and Rest-of-Europe

Asia-Pacific: China, Singapore, South Korea, Australia, and Rest-of-Asia-Pacific

Rest-of-the-World: Middle East and Africa and Latin America

North America has been playing a key role in driving innovation and regulatory progress in the global cultured meat market. A crucial moment occurred in 2022 when the Food and Drug Administration (FDA) gave the green light for GOOD Meat and UPSIDE Foods to sell cell-cultivated chicken commercially. In June 2023, the United States Department of Agriculture (USDA) issued landmark grants of inspection, marking the first regulatory approval for companies to produce and label their products as "cell-cultivated chicken" in the U.S. With over 94 companies involved in the global cultured meat market, around 40 operating in the U.S., showcased a strong commitment to industry growth backed by significant investments of approximately \$14 billion from 2010 to 2022. Despite challenges such as scaling production and achieving taste parity with traditional meat, North America's proactive approach is evident in ongoing research

funding, with the National Science Foundation (NSF) and USDA National Institute of Food and Agriculture (NIFA) collectively providing around \$17 million in grants for cell-cultivated meat projects over the past decade. This strategic approach, along with successful market introductions and a progressive regulatory framework, cements North America's position as a trailblazer, shaping the cultured meat industry globally.

Recent Developments in the Cultured Meat Market

The Dutch government issued a letter on July 5, 2023, that permits the consumption of seafood and meat raised in labs in a controlled environment. With this agreement, the Netherlands will be the first nation in Europe to permit pre-approval tastings of food produced using only animal cells.

In April 2022, UPSIDE Foods successfully concluded a remarkable \$400 million Series C funding round, marking the largest funding round in the industry. This substantial capital infusion was poised to propel the company toward seizing significant opportunities for scalability, resulting in a valuation exceeding \$1 billion.

In November 2022, the Food and Drug Administration gave UPSIDE Foods, a startup based in San Francisco, the green light to sell cultivated "no kill" meat in the U.S., marking the first step toward this goal. Without killing the animal, the company grows meat on animal cells.

In December 2022, Believer Meats, a pioneer in the cultivated meat industry, officially broke ground on its first commercial facility in the U.S. With the ability to produce at least 10,000 metric tons of cultivated meat without the need to kill a single animal, the 200,000-square-foot facility will be the largest cultivated meat production center in the world once it becomes operational.

Demand - Drivers, Limitations, and Opportunities

Market Driver: Increase in Demand for Alternative Protein

The surging demand for alternative protein sources is one of the key drivers behind the increasing market growth of cultured meat. The appeal of alternative proteins, such as cultured meat, is becoming increasingly evident as consumers look for more ethical and sustainable options. A number of factors, such as the depletion of natural resources,

growing greenhouse gas emissions, and environmental concerns related to conventional livestock farming, are driving this demand. Due to these problems, consumers are looking into alternatives that can lessen the negative environmental effects of traditional meat production.

Proteins are a major part of the human diet needed for survival. In many countries across the globe, people are consuming protein at a much higher rate (exceeding the daily nutritional requirement), most of which comes from animals. According to the UN Food and Agriculture Organization (FAO), the world will face a critical food shortage in the foreseeable future. Demand for meat is projected to grow by more than two-thirds because of the increasing urbanization globally. About 342 million tonnes of meat were produced in 2018, 47% more than that in 2000, with chicken meat representing half of the increase.

In April 2023, the renowned State of the Industry Report from the Good Food Institute (GFI), which offers insights into the alternative protein market, was released. By the end of 2022, all-time investments in plant-based, fermentation-derived, and farmed proteins were close to \$3 billion, \$4 billion, and \$8 billion, respectively.

Furthermore, since alternative proteins are more nutritious and don't contain hormones or antibiotics, they are becoming more and more popular among health-conscious consumers who avoid the risk of foodborne illnesses linked to conventional meat. Additionally, a growing market for plant-based diets and flexitarians reflects a broader shift in consumer preferences toward protein sources that are not derived from animals. Growing consumer demand for plant-based proteins is fostering the growth of the cultured meat industry, which provides consumers with a more ethical, health-conscious, and sustainable option in the changing food production landscape.

Market Challenge: High Production Cost

In 2013, the first cultured beef burger was developed at Maastricht University, and it took two years and \$325,000 to make. However, since then, businesses have cut their production costs by 99%. Prices remain high because of low scale and high production costs (caused by the costly nature of the technology and requirement for specialized tools and materials). According to a March 2022 Forbes report, a cultivated-meat burger costs approximately \$9.8019, which is more expensive than a regular burger. However, data from studies on technology life cycles (S-shaped curves) indicates that technology performance will increase with an increased understanding of the technology. Prices will inevitably fall when production volumes rise, and technological efficiencies are

combined.

In recent years, the cost of producing cultured meat has dropped dramatically. In 2013, a meat patty derived from cells costed \$1.2 million per pound. However, at the beginning of 2019, Aleph Farms calculated the cost to be 10,000 times lower, at \$100 per pound. It is still considerably higher than the plant-based or animal-based beef patty's retail price, i.e., ~\$12 per pound and ~\$3 per pound, respectively. In manufacturing cell-based protein, much of the variable costs come from cell culture media, the most expensive animal serum component. These serums supply vital trace nutrients and growth factors to developing cells. While there are non-animal serum substitutes, they typically have proprietary formulations and are much more costly. Shiok Meat, a cell-based seafood startup, estimated that 90% of its cost is attributed to commercial serum-free cell culture media.

This synergistic collaboration between manufacturers of cell-based protein and cell culture media is a clear strategy to reduce the expense. The partnerships are expected to bring worldwide manufacturing and supply chain expertise, as the animal feed industry is more mature than cell-based meat and cell-culture media production.

Market Opportunity: High Per Capita Meat Consumption and Imports in Countries

The high per capita meat consumption and significant meat imports in emerging Southeast Asian economies are presenting a promising opportunity in the market. As these economies continue to grow, their rising middle-class populations are driving increased demand for meat, placing substantial pressure on conventional livestock production. Cultured meat can fill this gap, offering a sustainable and locally produced alternative to traditional meat sources.

Moreover, the reliance on meat imports in these regions opens the door for cost-effective and domestically produced cultured meat, reducing dependency on foreign suppliers and improving food security. Cultured meat's potential to align with consumer preferences for ethical and sustainable food choices makes it well-positioned to cater to the meat demand in these economies while addressing environmental and resource constraints. This presents a golden opportunity for cultured meat producers to establish a foothold in this dynamic and burgeoning cultured meat market.

For instance, Cell AgriTech, a newly established cultivated meat company in Malaysia, has announced plans to finalize the construction of the country's first cultivated meat plant by the end of 2024.

Moreover, Singapore has gained distinction for granting regulatory approval to cultivated meat products, particularly those developed by GOOD Meat. Having initiated the construction of Asia's largest cultivated meat facility in the city-state last year, Singapore is also host to other cultivated meat producers, including Umami from Mihir's company.

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different applications of the cultured meat products available based on distribution channel (food service and fast food chains and retail), product type (poultry, beef, seafood, pork, and others), ingredient type (plant-derived ingredient and animal-derived ingredient). The market is poised for significant expansion with ongoing technological advancements, increased investments, and growing awareness of cultivated meat as an alternative protein. Therefore, the cultured meat business is a high-investment and high-revenue generating model.

Growth/Marketing Strategy: The cultured meat market has been growing at a rapid pace. The market offers enormous opportunities for existing and emerging market players. Some of the strategies covered in this segment are mergers and acquisitions, product launches, partnerships and collaborations, business expansions, and investments. The strategies preferred by companies to maintain and strengthen their market position primarily include partnerships and collaborations.

Competitive Strategy: The key players in the cultured meat market analyzed and profiled in the study include cultured meat manufacturers that produce cultured meat. Additionally, a comprehensive competitive landscape such as partnerships, agreements, and collaborations are expected to aid the reader in understanding the untapped revenue pockets in the market.

Research Methodology

Factors for Data Prediction and Modeling

The scope of this report has been focused on lab-grown meat only.

The base currency considered for the market analysis is US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations,

considering the average conversion rate for that particular year.

The currency conversion rate has been taken from the historical exchange rate of the Oanda website.

Nearly all the recent developments from January 2021 to December 2023 have been considered in this research study.

The information rendered in the report is a result of in-depth primary interviews, surveys, and secondary analysis.

Where relevant information was not available, proxy indicators and extrapolation were employed.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

Technologies currently used are expected to persist through the forecast with no major breakthroughs in technology.

Market Estimation and Forecast

This research study involves the usage of extensive secondary sources, such as certified publications, articles from recognized authors, white papers, annual reports of companies, directories, and major databases to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global cultured meat market.

The process of market engineering involves the calculation of the market statistics, market size estimation, market forecast, market crackdown, and data triangulation (the methodology for such quantitative data processes is explained in further sections). The primary research study has been undertaken to gather information and validate the market numbers for segmentation types and industry trends of the key players in the market.

Primary Research

The primary sources involve industry experts from the cultured meat market and various

stakeholders in the ecosystem. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

- o validation and triangulation of all the numbers and graphs
- o validation of reports segmentation and key qualitative findings
- o understanding the competitive landscape
- o validation of the numbers of various markets for market type
- o percentage split of individual markets for geographical analysis

Secondary Research

This research study involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global market. In addition to the aforementioned data sources, the study has been undertaken with the help of other data sources and websites, such as GFI and Delft University of Technology.

Secondary research was done in order to obtain crucial information about the industry's value chain, revenue models, the market's monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include:

- o segmentations and percentage shares
- o data for market value
- o key industry trends of the top players of the market
- o qualitative insights into various aspects of the market, key trends, and emerging areas

of innovation

o quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts and analyzing company coverage, product portfolio, and market penetration.

Some of the prominent names in this market are:

Mosa Meat

UPSIDE Foods

Aleph Farms

Mission Barns

Air Protein

BlueNalu

Meatable

SuperMeat

GOOD Meat

Finless Foods

CUBIQ FOODS

Believer Meats

Redefine Meat Ltd.

Vow Group Pty Ltd

Shiok Meats Pte Ltd

Companies that are not a part of the aforementioned pool have been well represented across different sections of the report (wherever applicable).

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