

Plant-Based Meat - A Global Market Overview

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Abstracts

The rising popularity of plant-based meat is reshaping the global food landscape, evolving from a niche concept into a mainstream category driven by health, environmental, and ethical considerations. Unlike traditional vegetarian staples such as tofu or tempeh, plant-based meats are engineered to replicate the taste, texture, and appearance of animal meat by processing proteins from soy, peas, wheat, and other crops, which are then combined with fats, binders, and flavorings. Ingredients like plant oils, vegetable pigments, and yeast extracts enhance juiciness, color, and savory flavors, while extrusion techniques create a fibrous, meat-like structure. The product range has expanded beyond burgers to include sausages, ground meat, nuggets, and seafood alternatives, with major fast-food chains and restaurants accelerating adoption. This surge is fueled not only by vegans and vegetarians but also by flexitarians seeking to reduce meat consumption for health and sustainability reasons. Global revenues for plant-based meat are expected to grow from US\$10.4 billion in 2025 to US\$30.4 billion by 2032, registering a CAGR of 16.5% during the forecast period.

However, the industry faces notable hurdles that could restrain growth. Plant-based meats remain significantly more expensive than conventional meat, creating affordability challenges and highlighting the need for price parity to achieve mass-market acceptance. Despite progress, some consumers remain unconvinced by the taste, texture, and nutritional value, with concerns also tied to over-processing and sodium content. Producers must secure consistent supplies of high-quality plant proteins to meet scaling demands while continuing R&D to improve product quality and transparency. At the same time, the sector contends with the entrenched traditional meat industry, which benefits from established supply chains, lobbying strength, and a loyal customer base. Addressing these challenges while capitalizing on evolving consumer preferences and expanding distribution channels will be key to sustaining long-term growth.

Plant-Based Meat Regional Market Analysis

North America is set to lead the global plant-based meat market with a 35.9% share in 2025, supported by mature consumer adoption, health awareness around risks of red and processed meat, rising flexitarian diets, environmental and animal welfare concerns, and strong government backing for sustainable food innovation. High disposable incomes and a robust ecosystem of R&D-driven companies further fuel growth despite premium pricing, with studies showing 96% of meat buyers in the US also purchase plant-based options. Meanwhile, Asia-Pacific is projected to post the fastest CAGR of 18.7% between 2025 and 2032, driven by rapid urbanization, a growing middle class, cultural familiarity with plant-based diets, and post-pandemic health consciousness favoring low-cholesterol and antioxidant-rich foods. Regional policies like India's "Eat Right India" and China's 50% meat reduction goal by 2030, coupled with sustainability-driven initiatives such as Singapore's FoodInnovate grants, are boosting adoption. With livestock emissions accounting for 18% of global greenhouse gases, eco-friendly alternatives are gaining traction, while consumer preference in markets like Japan and India for clean-label, non-GMO products and innovations tailored to local tastes are accelerating demand.

Plant-Based Meat Market Analysis by Source

Soy protein will dominate the global plant-based meat market with a 41.1% share in 2025 and is also expected to record the fastest CAGR of 23.6% through 2032, supported by its nutritional completeness, affordability, and versatility in product formulation. As a complete protein containing all nine essential amino acids, soy offers cholesterol-free, low-fat, fiber- and antioxidant-rich benefits, with studies showing it can lower LDL cholesterol by 5-6% and aid muscle building, making it popular among health-conscious consumers, athletes, and vegans. Its ability to mimic meat's fibrous texture, juiciness, and mouthfeel through extrusion, along with superior flavor absorption, emulsification, viscosity, and water-binding (up to five times its weight), makes it ideal for burgers, sausages, and other products while reducing production costs by 20-30% versus pea or wheat proteins. With soy priced at just \$0.01 per gram of protein (vs. \$0.12 for chicken), backed by over 350 million tons of annual production and established supply chains, it offers unmatched scalability and affordability, further reinforced by R&D investments in GMO-free varieties that address reliability issues linked to pea shortages and wheat's gluten concerns.

Plant-Based Meat Market Analysis by Type

Plant-based chicken will lead the global plant-based meat market by type with a 34% share in 2025, driven by its versatility in products like nuggets, patties, sausages, tenders, and cutlets, along with its close resemblance to traditional chicken in taste, texture, and culinary use. Widely adopted across retail and foodservice, it appeals to flexitarians and omnivores by fitting seamlessly into familiar dishes, while its cost-competitiveness, scalability, and reliance on established raw materials like soy and pea protein make it the largest segment, further reinforced by heavy investments from major food companies. In contrast, plant-based fish is projected to post the fastest CAGR of 19.3% between 2025 and 2032, fueled by concerns over overfishing, ecosystem depletion, and demand for sustainable seafood alternatives. Designed to replicate seafood's nutritional profile with omega-3s from algae, high protein, and low saturated fat, plant-based fish is gaining traction among health-conscious and eco-aware consumers, with lower market saturation creating room for innovation. Brands such as Good Catch and Nestle's Vuna are rapidly launching tuna, salmon, and fish stick alternatives, supported by advancements in 3D printing and fermentation that replicate fish's flaky texture and flavor, while ingredients like algae, konjac, and pea protein enhance authenticity and sensory appeal.

Plant-Based Meat Market Analysis by Product

Burger patties will dominate the global plant-based meat market by product with a 36.8% share in 2025, driven by their popularity among flexitarians, 33-66% of consumers aged 16-40, who seek meat-like formats without major dietary shifts. As the entry point for over 70% of plant-based buyers, patties benefit from innovations like extrusion and heme analogs (e.g., soy leghemoglobin) that deliver juiciness, texture, and sizzle, achieving nearly 80% sensory satisfaction and over 90% repurchase rates among flexitarians. Made largely from soy and pea proteins, they match beef's amino acid profile while cutting saturated fats by 35% and eliminating cholesterol, with added health, ethical, and environmental benefits including reduced LDL cholesterol, animal welfare concerns cited by 96% of buyers, and 77% fewer GHG emissions than beef. Despite costing 10-20% more than traditional patties, demand remains strong among millennials and Gen Z, supported by policies like the EU Green Deal and US subsidies, with 65% of consumers prioritizing ethical spending. Meanwhile, nuggets, tenders, and cutlets are set to post the fastest CAGR of 18.6% between 2025 and 2032, reflecting chicken's global appeal, strong protein profile, and suitability for kids' meals, school lunches, and QSR menus, with frozen and refrigerated formats further fueling growth across supermarkets and e-commerce.

Plant-Based Meat Market Analysis by Storage

Frozen plant-based meat will dominate with a 64.2% share in 2025, led by products like burgers, nuggets, and sausages that benefit from extended shelf life of 6-24 months versus just 1-3 months for refrigerated options. Frozen formats allow bulk buying, reduce spoilage costs by 20-30%, and align with clean-label trends since minimal preservatives are needed, with consumers perceiving them as fresher and safer. Strong cold-chain infrastructure in regions like North America and Europe, along with collaborations with QSRs such as McDonald's and KFC, are boosting scalability, while the 77% lower greenhouse gas emissions compared to meat further enhance appeal among health- and eco-conscious buyers. In contrast, refrigerated plant-based meat will post the fastest CAGR of 17.5% between 2025 and 2032, driven by urban millennials and Gen Z (33% flexitarians) seeking fresh, minimally processed products with short shelf lives that signal premium quality. Formats such as patties, strips, and grounds are gaining visibility in supermarket deli counters and premium HoReCa, supported by innovations like Impossible's refrigerated grounds and fortified nuggets with B12/omega-3, alongside advances in soy and pea isolates improving texture and nutrition.

Plant-Based Meat Market Analysis by Distribution Channel

Supermarkets and hypermarkets will account for the largest share of the plant-based meat market at 49.3% in 2025, benefiting from wide product assortments across frozen, fresh, and refrigerated categories, strong visibility in dedicated aisles, and cold storage that ensures freshness. High shopper footfall and convenience make these outlets the top channel for discovery and trial, further supported by in-store promotions, sampling, discounts, and private-label collaborations between retailers and brands. Expanding supermarket presence in Asia-Pacific, loyalty programs, and sustainable labeling are adding momentum. Meanwhile, online retail channels will register the fastest CAGR of 21.3% during 2025-2032, fueled by digital transformation, rising e-commerce penetration in emerging markets, and younger demographics' preference for convenience and variety. Online platforms like Amazon and company websites enable easy browsing, detailed product information, reviews, and allergen filters, while subscription models encourage repeat purchases. Discounts, fast delivery, and contactless shopping, popularized during the pandemic, remain strong drivers, reinforced by social media integrations, influencer partnerships, and targeted ads highlighting health and sustainability benefits that expand global reach and consumer loyalty.

Plant-Based Meat Market Report Scope

This global report on Plant-Based Meat analyzes the global and regional markets based on Source, Type, Product, Storage and Distribution Channel for the period 2022-2032 with projections from 2025 to 2032 in terms of value in US\$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics

Analysis Period: 2022-2032

Base Year: 2025

Forecast Period: 2025-2032

Units: Value market in US\$

Companies Mentioned: 55+

Plant-Based Meat Market by Geographic Region

North America (The United States, Canada and Mexico)

Europe (France, Germany, Italy, Russia, Spain, the United Kingdom and Rest of Europe)

Asia-Pacific (China, India, Japan, South Korea and Rest of Asia-Pacific)

South America (Argentina, Brazil, Chile, Colombia, Peru and Rest of South America)

Middle East & Africa (Saudi Arabia, South Africa, the UAE and Rest of Middle East & Africa)

Plant-Based Meat Market by Source

Blends

Pea Protein

Soy Protein

Wheat Gluten (Seitan)

Other Sources (Incl. Algae & Microalgae Proteins, Fungi/Mycoproteins, Lentils, Chickpeas & Beans, Potato Protein, Quinoa, Amaranth & Millets and Rice Protein)

Plant-Based Meat Market by Type

Plant-Based Beef

Plant-Based Chicken

Plant-Based Fish

Plant-Based Pork

Other Plant-Based Meat Types (Incl. Crustaceans, Deli Meats, Game Meats, Goat, Jerky, Lamb, Organ Meat Substitutes, Shellfish & Turkey)

Plant-Based Meat Market by Product Type

Burger Patties

Grounds

Meatballs

Nuggets, Tenders & Cutlets

Sausages

Strips

Other Products (Incl. Fillets, Fingers & Slices)

Plant-Based Meat Market by Storage Type

Frozen Plant-Based Meat

Refrigerated Plant-Based Meat

Shelf-Stable Plant-Based Meat

Plant-Based Meat Market by Distribution Channel

Food Service Channels

Online Retail Channels

Specialty Stores

Supermarkets/Hypermarkets

Delivery Time: 3-4 Business Days

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Blends

Pea Protein

Soy Protein

Wheat Gluten (Seitan)

Other Sources (Incl. Algae & Microalgae Proteins, Fungi/Mycoproteins, Lentils, Chickpeas & Beans, Potato Protein, Quinoa, Amaranth & Millets and Rice Protein)

Plant-Based Meat Types

Plant-Based Beef

Plant-Based Chicken

Plant-Based Fish

Plant-Based Pork

Other Plant-Based Meat Types (Incl. Crustaceans, Deli Meats, Game Meats, Goat, Jerky, Lamb, Organ Meat Substitutes, Shellfish & Turkey)

Plant-Based Meat Product Types

Burger Patties

Grounds

Meatballs

Nuggets, Tenders & Cutlets

Sausages

Strips

Other Products (Incl. Fillets, Fingers & Slices)

Plant-Based Meat Storage Types

Frozen Plant-Based Meat

Refrigerated Plant-Based Meat

Shelf-Stable Plant-Based Meat

Plant-Based Meat Distribution Channels

Food Service Channels

Online Retail Channels

Specialty Stores

Supermarkets/Hypermarkets

2. KEY MARKET TRENDS

3. KEY MARKET PLAYERS

ADF Foods
Amy's Kitchen, Inc.
Atlantic Natural Foods LLC
Before the Butcher
Beyond Meat, Inc.
Boca Foods Co
Century Pacific Food
ConAgra Brands, Inc.
Dr. Praeger's Sensible Foods
Eat JUST, Inc.
Ecotone
Everbest Soya Bean Products
Fazendo Futuro
Gardein, Inc.
Garden Protein International
Gold & Green Foods Ltd
GoodDot Enterprises Pvt Ltd
Green Monday
Greenwise
Hilcona
Impossible Foods, Inc.
ITC Ltd
JBS SA
Kellanova
Kikka Sushi
Lightlife Foods, Inc
LikeMeat GmbH
Linda McCartney
Maple Leaf Foods, Inc.
Marlow Foods Ltd.
Monde Nissin Corp
MorningStar Farms
Moving Mountains Foods
Nestle SA

No Evil Foods, Inc.
Novameat
Ojah BV
OMG Meats
Omnipork
Planterra Foods
Quorn Foods. Inc.
Rugenwalder Muhle
Sunfed Meats
Sweet Earth, Inc.
Symington's
Taifun-Tofu GmbH
Tata Consumer Products Ltd
Tesco
The Hain Celestial Group
The Kraft Heinz Co
The Vegetarian Butcher
Tofurkey
Trader Joe's
Tyson Foods
Unilever Plc
V2food Pty Ltd
VBites Foods Ltd
Vezlay Foods Pvt Ltd
yumeat
Yves Veggie Cuisine, Inc.
Zikoo

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Blends

Pea Protein

Soy Protein

Wheat Gluten (Seitan)

Other Sources (Incl. Algae & Microalgae Proteins, Fungi/Mycoproteins, Lentils,

Chickpeas & Beans, Potato Protein, Quinoa, Amaranth & Millets and Rice Protein)

Global Plant-Based Meat Market Overview by Type

Plant-Based Meat Type Market Overview by Global Region

Plant-Based Beef

Plant-Based Chicken

Plant-Based Fish

Plant-Based Pork

Other Plant-Based Meat Types (Incl. Crustaceans, Deli Meats, Game Meats, Goat, Jerky, Lamb, Organ Meat Substitutes, Shellfish & Turkey)

Global Plant-Based Meat Market Overview by Source

Plant-Based Meat Product Type Market Overview by Global Region

Burger Patties

Grounds

Meatballs

Nuggets, Tenders & Cutlets

Sausages

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PART C: GUIDE TO THE INDUSTRY

PART D: ANNEXURE

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2. FEEDBACK

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