

Cultured Meat Market Report by Source (Poultry, Beef, Seafood, Pork, Duck), Application (Nuggets, Burgers, Meatballs, Sausages, Hot Dogs), End User (Household, Food Services), and Region 2024-2032

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Abstracts

The global cultured meat market size reached US\$ 209.1 Million in 2023. Looking forward, IMARC Group expects the market to reach US\$ 582.6 Million by 2032, exhibiting a growth rate (CAGR) of 11.8% during 2024-2032. The market is driven by growing environmental concerns, expanding vegan populations, and technological advancements, offering a sustainable and cruelty-free alternative to traditional meat production while aligning with ethical and environmental goals.

Cultured Meat Market Analysis:

Major Market Drivers: The growing awareness about the benefits associated with cultured meat and surging concerns about animal welfare are propelling the market growth. As people become more health-conscious, they are seeking alternatives to conventional meat products. Cultured meat can be produced without antibiotics, hormones, or the risk of contamination from pathogens, offering a cleaner and potentially healthier option.

Key Market Trends: Expanding product range, enhanced taste and texture, cost reduction, and increasing advances in biotechnology are majorly driving the market growth. High-profile endorsements from celebrities and partnerships with well-known chefs and food brands are helping to raise awareness and legitimacy of cultured meat products. These collaborations are also driving innovation in product development and marketing, further proliferating the cultured meat market demand.

Geographical Landscape: According to the report, Asia Pacific accounted for the largest market share. With rapid population growth, urbanization, and increasing consumer disposable incomes, there's a growing demand for protein-rich foods in the Asia Pacific region. Cultured meat offers a sustainable and scalable solution to meet this demand without further straining resources. Asia Pacific countries are witnessing increasing environmental awareness and concerns about the impact of traditional meat production, which is proliferating the demand for cultured meat.

Competitive Landscape: Some of the leading cultured meat market companies are Aleph Farms, BlueNalu Inc., Cubiq Foods S.L., Finless Foods Inc., Future Meat Technologies, IntegriCulture Inc., Meatable, Mission Barns, Mosa Meat, New Age Meats, Shiok Meats, and Upside Foods., among many others.

Challenges and Opportunities: High production costs, regulatory hurdles, technology and research risks, competition from the traditional meat industry and plant-based alternatives are some of the challenges that the market is facing. However, cultured meat can be produced without antibiotics, hormones, or the risk of foodborne illnesses, offering a cleaner and potentially healthier protein source, which represents key opportunities for the manufacturers. Health-conscious consumers are increasingly interested in such alternatives, thereby further stimulating the market growth.

Cultured Meat Market Trends:

Growing Environmental Concerns

The growing awareness of the environmental impact of conventional meat production, such as deforestation, water pollution, and greenhouse gas emissions, is driving consumers to seek more sustainable alternatives. For instance, according to Environment America, in 2018, the slaughterhouses released more than 55 million pounds of toxic products into the rivers. In line with this, according to the article published by Earth.org in February 2024, the Amazon rainforest which is also known as 'Lungs of the Earth' experienced major deforestation. The production of beef is the main cause of deforestation worldwide; land converted for cattle grazing and feed production accounts for around 41% of deforestation annually, or about 2.1 million hectares. This means that the loss of trees due to animal husbandry amounts to more than 16.4 million

trees every day. Cultured meat offers a solution with a lower environmental footprint, making it an attractive option for environmentally conscious consumers. Moreover, concerns about animal welfare and the ethical treatment of animals in traditional farming practices are leading many consumers to look for alternatives. Cultured meat eliminates the need for animal slaughter, offering a cruelty-free option for those who want to reduce their impact on animals. These factors are further driving the culture meat market demand.

Expanding Vegan Population

The escalating number of vegans and vegetarians worldwide is expanding the potential market for cultured meat. For instance, about 2% of Americans identify as vegans, a larger percentage of the population is cutting back on their meat consumption. According to research by One Poll in 2021, over one in two Americans consumes more plant-based meals than meat, with 54% of those aged 24 to 39 identifying as flexitarian. The Alliance for Science estimates that one in ten Americans do not eat meat. Vegans, who avoid all animal products, traditionally have limited options for protein sources. In line with this, the number of vegan people in UK increased by nearly 1.1 million between 2023 and 2024. Cultured meat provides a viable alternative that aligns with their ethical beliefs while offering a familiar taste and texture of meat. In line with this, vegans and vegetarians abstain from consuming animal products due to ethical concerns about animal welfare and environmental sustainability. Cultured meat addresses these concerns by providing a cruelty-free alternative that doesn't involve the slaughter of animals or contribute to the negative environmental impacts associated with traditional livestock farming. Apart from this, governments across various countries are also approving cultured meat. For instance, in June 2023, U.S. regulators legalized the sale of cultured meat to customers for the first time, supporting a new era in which, steak or chicken breast may be created in a lab rather than on a farm.

Technological Advancements

Advancements in biotechnology are at the forefront of cultured meat production. Techniques such as tissue engineering, cell culture, and bioreactor design are continuously improving, allowing for more efficient and cost-effective production of cultured meat. Moreover, governments across various countries are taking initiatives to promote cultured meat. For instance, in January 2024, the Indian Council of Agricultural Research (ICAR) institute signed a first-of-its-kind agreement in India with a startup to develop lab-grown fish meat. Central Marine Fisheries Research Institute (CMFRI) based in Kochi signed a collaborative research agreement with Neat Meatt Biotech, a

startup working on cultivated meat. This is further bolstering the cultured meat market demand. Moreover, innovations in cell culture techniques, such as serum-free media and 3D scaffolding, are enabling the growth of muscle, fat, and connective tissue cells to create complex meat structures that closely resemble traditional meat products. For instance, in May 2023, researchers developed lab-grown fat tissue that resembles the texture and composition of natural animal fat, which may improve the flavor and texture of cultured meat. The process includes growing fat cells in a 2D layer and then aggregating them into a 3D mass with food-grade binders, overcoming past hurdles of bulk fat tissue cultivation and potentially permitting mass manufacturing of more realistic lab-grown meat. Besides this, technology is helping to scale up cultured meat production from small laboratory-scale batches to larger commercial-scale operations. Automation, bioreactor optimization, and process engineering are being developed to increase production efficiency and reduce costs.

Cultured Meat Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global cultured meat market report, along with forecasts at the global, regional, and country levels from 2024-2032. Our report has categorized the market based on source, application, and end user.

Breakup by Source:

Poultry

Beef

Seafood

Pork

Duck

Poultry dominates the market

The report has provided a detailed breakup and analysis of the market based on the source. This includes poultry, beef, seafood, pork, and duck. According to the cultured meat market report, poultry represented the largest segment.

The growth of poultry is driven by the rising consumption of chicken and eggs along with increasing concern among people for the slaughtering of animals. With growing awareness of the environmental impact of traditional animal agriculture, including deforestation, greenhouse gas emissions, and water pollution, consumers and policymakers are seeking more sustainable alternatives. Poultry cultured meat offers a way to produce meat with a significantly lower environmental footprint, driving interest and investment in this technology. In addition, as people become more health-conscious, they are looking for meat alternatives that are lower in saturated fat, free from antibiotics and hormones, and potentially tailored to meet specific dietary needs. Poultry cultured meat can be engineered to be healthier than conventionally raised meat, providing a nutritious option for consumers. These factors are proliferating the demand for poultry. For instance, in June 2023, the US Department of Agriculture (USDA) approved the sale of cell-cultured chicken from two Bay Area food technology startups, Good Meat and Upside Foods.

Breakup by Application:

Nuggets

Burgers

Meatballs

Sausages

Hot Dogs

A detailed breakup and analysis of the market based on the application has also been provided in the report. This includes nuggets, burgers, meatballs, sausages, and hot dogs.

Cultured meat has the potential to be used in a variety of processed meat products, including nuggets, burgers, meatballs, sausages, and hot dogs. Cultured meat can be used as the main ingredient in chicken nuggets, replicating the taste and texture of conventional chicken. While, in burgers it can be used to create beef-like patties or chicken patties. Similar to this, cultured meat can be grounded and mixed with seasonings, breadcrumbs, and binders to make meatball mixtures. In addition, cultured

meat can be used to produce sausage and hot dog-like products, whether it's chicken sausages, pork sausages, or beef sausages.

Breakup by End User:

Household

Food Services

Food services accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the end-user. This includes household and food services. According to the report, food services represented the largest segment.

Food services are increasingly looking to incorporate cultured meat as a rising number of consumers are seeking plant-based and sustainable options. In addition, cultured meat provides an opportunity to offer meat-like products that appeal to both meat-eaters and vegetarians/vegans, satisfying a broader customer base. Moreover, many consumers are concerned about animal welfare and the ethical implications of meat production. Cultured meat offers a solution by providing meat without the need for raising and slaughtering animals. Food services can capitalize on this by offering ethically produced meat alternatives. For instance, in August 2023, UPSIDE Foods, a cultivated meat, poultry, and seafood company opened the reservation at Bar Crenn. This is further expected to create a demand in the food services segment.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Asia-Pacific exhibits a clear dominance in the market

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

Asia Pacific is home to a large and rapidly growing population, particularly in urban areas. As incomes rise and lifestyles change, there's an increasing demand for meat products. Cultured meat offers a sustainable and efficient way to meet this demand without the environmental drawbacks of traditional meat production. Moreover, the Asia Pacific region faces significant environmental challenges due to pollution, deforestation, and habitat loss. Cultured meat has a much lower environmental footprint compared to conventional meat production, making it an attractive option for consumers and policymakers concerned about sustainability. For instance, in April 2024, Singapore approved VOW, an Australian company that made woolly mammoth meatballs, to sell its cultured quail meat in the city-state.

Competitive Landscape:

The market research report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Aleph Farms

BlueNalu Inc.

Cubiq Foods S.L.

Finless Foods Inc.

Future Meat Technologies

IntegriCulture Inc.

Meatable

Mission Barns

Mosa Meat

New Age Meats

Shiok Meats

Upside Foods

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Cultured Meat Market Recent Developments:

May 2024: Meatly, a company that produces cultured meat, announced the creation of a novel protein-free culture medium to make it commercially viable for supermarkets, as it costs just 1 pound.

April 2024: Singapore approved VOW, an Australian company that made woolly mammoth meatballs, to sell its cultured quail meat in the city-state.

January 2024: The Indian Council of Agricultural Research (ICAR) institute signed a first-of-its-kind agreement in India with a startup to develop lab-grown fish meat. Central Marine Fisheries Research Institute (CMFRI) based in Kochi signed a collaborative research agreement with Neat Meatt Biotech, a startup working on cultivated meat.

Key Questions Answered in This Report

1. What was the size of the global cultured meat market in 2023?
2. What is the expected growth rate of the global cultured meat market during 2024-2032?
3. What are the key factors driving the global cultured meat market?

4. What has been the impact of COVID-19 on the global cultured meat market?
5. What is the breakup of the global cultured meat market based on the source?
6. What is the breakup of the global cultured meat market based on end user?
7. What are the key regions in the global cultured meat market?
8. Who are the key players/companies in the global cultured meat market?

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