

# **Meat Substitutes Market Report by Type (Tofu & Tofu Ingredients, Tempeh, Textured Vegetable Protein (TVP), Seitan, Quorn, and Others), Source (Soy, Wheat, Mycoprotein, and Others), Category (Frozen, Refrigerated, Shelf-Stable), Distribution Channel (Supermarkets and Hypermarkets, Health and Food Stores, Convenience Stores, and Others), and Region 2024-2032**

<https://marketpublishers.com/r/MDA0535D01D0EN.html>

Date: March 2024

Pages: 149

Price: US\$ 3,899.00 (Single User License)

ID: MDA0535D01D0EN

## **Abstracts**

The global meat substitutes market size reached US\$ 6.9 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 11.6 Billion by 2032, exhibiting a growth rate (CAGR) of 5.8% during 2024-2032. The rising adoption of vegetarian and vegan diets, growing awareness about the negative effects of high meat consumption, and heightened emphasis on sustainable development are some of the major factors propelling the market.

Meat substitutes are products designed to replicate the taste, texture, and nutritional profile of animal-based meat, primarily utilizing plant-based ingredients such as legumes, grains, and fungi. Manufacturers are employing advanced technologies like 3D printing and cellular agriculture to produce meat substitutes that closely mimic traditional meat. With a focus on sustainability, these products typically have a lower carbon footprint, water usage, and land requirement compared to their animal-based counterparts. Moreover, meat substitutes cater to diverse dietary needs, including vegan, vegetarian, and flexitarian diets, thus widening their consumer base. These products come in various forms such as burgers, sausages, and nuggets, and are available across supermarkets, specialty stores, and online platforms. As a result, meat

substitutes are gaining traction among the masses due to rising health awareness, environmental concerns, and ethical considerations related to animal welfare.

The diversification of culinary preferences, fueled by rapid globalization and increased exposure to international cuisines, will stimulate the growth of the meat substitutes market during the forecast period. As people become more willing to experiment with their food choices, the demand for versatile and novel plant-based products grows. Moreover, the rising government support and regulatory changes that encourage sustainable farming and food production methods, including grants and incentives for plant-based ventures, is contributing to market growth. These regulatory mechanisms are making it easier for meat substitute manufacturers to scale their operations and reach a broader customer base. In addition, ongoing advancements in food technology, such as cellular agriculture and 3D food printing, are enabling the development of products that are virtually indistinguishable from traditional meat, further augmenting their acceptance among mainstream consumers. Besides this, economic factors also play a crucial role, as meat substitutes are increasingly viewed as cost-effective in the long run, particularly when considering the long-term healthcare costs associated with diets rich in animal-derived products. Furthermore, the escalating influence of social media and celebrity endorsements advocating for plant-based diets are influencing public opinions and purchasing behaviors, thus fueling market growth.

#### Meat Substitutes Market Trends/Drivers:

##### Heightened Health and Nutrition Awareness

The growing awareness about the benefits of a balanced diet rich in plant-based proteins is one of the key factors propelling the meat substitutes market forward. As consumers become increasingly conscious of the adverse health effects associated with high meat consumption, such as elevated cholesterol levels and cardiovascular diseases, the demand for healthier alternatives continues to rise. Meat substitutes typically provide essential amino acids, vitamins, and minerals while containing fewer saturated fats and zero cholesterol. This heightened focus on well-being and preventative healthcare is particularly notable among millennials and Generation Z, who are more willing to adopt lifestyle changes for long-term health benefits. Consequently, increased health and nutrition awareness is serving as a catalyst for the expanding meat substitutes market.

##### Increase in Ethical Considerations

A significant rise in ethical considerations related to animal welfare among the masses has become a significant factor favoring the growth of the meat substitutes market. Animal agriculture often raises concerns about inhumane treatment and ethical dilemmas surrounding mass production. As a result, a growing segment of the population is opting for cruelty-free alternatives to conventional animal products. Activism, documentaries, and increased public discourse on animal welfare have further fueled this ethical awakening. This global shift is affecting consumer behavior and compelling manufacturers to offer ethical options, such as meat substitutes, thus contributing to market growth.

### Rise in Environmental Concerns

Sustainability and environmental preservation are other major factors stimulating the growth of the meat substitutes market. Traditional animal farming has been linked to significant environmental issues, including deforestation, greenhouse gas emissions, and excessive water usage. On the other hand, plant-based alternatives have a considerably lower environmental impact. As climate change and resource conservation continue to gain prominence in global discussions, the need for sustainable food production becomes urgent. The meat substitutes market is effectively responding to this growing concern by providing products that are both eco-friendly and resource-efficient, making it a viable solution for a sustainable future.

### Meat Substitutes Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global meat substitutes market report, along with forecasts at the global and regional levels from 2024-2032. Our report has categorized the market based on type, source, category and distribution channel.

### Breakup by Type:

- Tofu & Tofu Ingredients
- Tempeh
- Textured Vegetable Protein (TVP)
- Seitan
- Quorn
- Others

Tofu & tofu ingredients represent the most popular type of meat substitute

The report has provided a detailed breakup and analysis of the market based on the type. This includes tofu and tofu ingredients, tempeh, textured vegetable protein (TVP), seitan, quorn, and others. According to the report, tofu and tofu ingredients represented the largest segment.

Tofu has a long history and is well-established in many cuisines, especially in Asian countries, making it familiar to a large segment of consumers. Its relatively neutral taste and texture make it highly versatile, allowing it to be easily incorporated into a wide range of dishes, from savory to sweet. This flexibility appeals to both home cooks and professional chefs alike, contributing to its growing popularity. Nutritionally, tofu is a powerhouse, providing a balanced profile of essential amino acids, vitamins, and minerals, which meets the health and wellness criteria that many consumers are seeking. It is also usually lower in fat and calories compared to animal-based protein sources, aligning well with weight management and cardiovascular health goals.

Furthermore, tofu is comparatively affordable and readily available. It is usually less expensive than specialty meat substitutes, making it accessible to a broader demographic. Its widespread availability in grocery stores, specialty health food stores, and online platforms ensures that it remains a convenient choice for consumers. Apart from this, the simplicity of its production process, which involves coagulating soy milk and pressing it into blocks, makes it environmentally sustainable. This aligns well with the rising consumer concerns for eco-friendly food options, thus accelerating the sales of tofu and tofu ingredients, propelling the growth of this segment.

#### Breakup by Source:

- Soy
- Wheat
- Mycoprotein
- Others

Soy holds the largest share in the market

A detailed breakup and analysis of the market based on the source has also been provided in the report. This includes soy, wheat, mycoprotein, and others. According to the report, soy accounted for the largest market share.

Soy is a complete protein, containing all nine essential amino acids required by the human body. Its rich nutritional profile makes it an ideal alternative to animal-based

proteins, fulfilling consumer demand for health-conscious options. Moreover, soy has been extensively researched and its health benefits, including its potential to lower cholesterol levels and mitigate symptoms of menopause, are well-documented. From a manufacturing perspective, soy is highly versatile and easily adaptable to various food technologies. It can be processed into a multitude of forms such as tofu, tempeh, and textured vegetable protein, allowing for a wide range of meat substitute products. This flexibility in production enhances its attractiveness for both manufacturers and consumers.

Economic factors also contribute to soy's dominance in the market. Soybeans are a major global crop, and economies of scale make it a cost-effective option for both producers and consumers. The extensive supply chain and well-established infrastructure for soy production ensure a steady, reliable supply of raw material. Although all plant-based sources generally have lower environmental impact compared to animal-based proteins, soy cultivation is often more land-efficient than other protein crops. Therefore, soy-based meat substitutes are perceived as a more sustainable choice, which aligns with the increasing consumer focus on eco-friendly products, favoring segment growth.

Breakup by Category:

Frozen

Refrigerated

Shelf-Stable

Frozen meat substitutes dominate the market

The report has provided a detailed breakup and analysis of the market based on the category. This includes frozen, refrigerated, and shelf-stable. According to the report, frozen represented the largest segment.

Frozen meat substitutes offer busy consumers a quick and easy option for meal preparation, aligning with the emerging trend of convenience foods. These frozen products often come pre-seasoned or pre-marinated, requiring minimal cooking skills and time, making them highly appealing to those leading fast-paced lives. Longer shelf-life is another major factor augmenting the popularity of frozen meat substitutes. Unlike fresh alternatives, frozen products can be stored for extended periods without compromising their nutritional value or taste. This longevity reduces food waste and allows consumers to stock up, providing both economical and practical benefits.

Moreover, advances in freezing technology have made it possible to preserve the texture, flavor, and nutritional content of meat substitutes effectively. High-quality frozen meat substitutes are now virtually indistinguishable from their fresh counterparts once cooked, removing previous stigmas associated with frozen foods being inferior in taste or nutritional value. In addition, the frozen category benefits from broader distribution capabilities. Frozen products can be transported over long distances and are less sensitive to temperature fluctuations, making them more accessible to consumers in areas where fresh meat substitutes may not be readily available. A combination of convenience, extended shelf-life, product quality, and broader distribution contributes to the escalating demand for frozen products, fueling the growth of this segment.

Breakup by Distribution Channel:

- Supermarkets and Hypermarkets
- Health and Food Stores
- Convenience Stores
- Others

Meat substitutes are majorly distributed through supermarkets and hypermarkets

A detailed breakup and analysis of the market based on the distribution channel has also been provided in the report. This includes supermarkets and hypermarkets, health and food stores, convenience stores, and others. According to the report, supermarkets and hypermarkets accounted for the largest market share.

The main factors that are driving the growth of this segment are the widespread accessibility, consumer trust, and diverse product offerings of supermarkets and hypermarkets. These retail outlets provide a convenient one-stop shopping experience for consumers, making it easy to discover and purchase meat substitute products alongside their regular groceries. The extensive reach of these retail stores ensures that a wide range of consumers can access meat substitutes without having to travel far. This easy accessibility is crucial for capturing both health-conscious and environmentally aware consumers seeking alternatives to traditional animal-based products.

Additionally, supermarkets and hypermarkets have established themselves as reliable sources of food products, creating a sense of trust among consumers regarding the quality, safety, and authenticity of their products. This trust is especially important for

meat substitutes, as consumers may be trying these products for the first time and rely on established retailers to provide accurate information. Also, these retail channels offer a broad selection of meat substitute brands and types, catering to different dietary preferences and tastes. This variety further encourages experimentation and allows consumers to choose products that align with their individual needs and preferences. Furthermore, rising promotions, product displays, and marketing campaigns by supermarkets and hypermarkets help raise awareness and boost sales of meat substitutes, thus driving the segment growth.

#### Breakup by Region:

Asia Pacific

Europe

North America

Middle East and Africa

Latin America

Europe 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 Asia Pacific, Europe, North America, Middle East and Africa, and Latin America. According to the report, Europe accounted for the largest market share.

Europe held the biggest market share due to evolving dietary preferences, environmental consciousness, robust regulatory support, and a rich cultural history of plant-based cuisine. European consumers are increasingly adopting flexitarian, vegetarian, and vegan diets, driven by health concerns and a growing awareness of the environmental impact of traditional meat consumption. The region also places a strong emphasis on sustainability and has a well-informed consumer base that values eco-friendly products. Meat substitutes, with their lower carbon footprint and reduced resource consumption, align well with these values.

Another major contributing aspect is favorable regulatory support. European governments and regulatory bodies are proactively promoting sustainable food production and reducing greenhouse gas emissions. This support encourages both manufacturers and consumers to embrace plant-based alternatives, thereby fueling the meat substitutes market. Europe's diverse culinary heritage also contributes to the market growth. Many European countries have a rich tradition of plant-based dishes that have been consumed for centuries. This cultural familiarity with plant-based foods

has paved the way for a smoother transition to meat substitutes.

Moreover, Europe's well-developed retail infrastructure, including supermarkets, specialty health food stores, and online platforms, ensures easy accessibility to a wide array of meat substitute products. This availability, coupled with effective marketing and education campaigns, has helped build consumer interest and acceptance, further solidifying the position of Europe as a leading regional market for meat substitutes.

#### Competitive Landscape:

The market is experiencing steady growth as key players in the meat substitutes industry are actively engaged in product innovation, research and development (R&D), and strategic partnerships to maintain their competitive edge. The leading manufacturers are investing in advanced technologies to enhance the texture, taste, and nutritional profiles of their products, aiming to replicate the experience of consuming traditional meat. These industry players are also focusing on expanding their product portfolios to include a wider range of options, catering to diverse consumer preferences and dietary needs. Additionally, strategic collaborations with retailers, restaurants, and food service providers are helping these companies to broaden their market reach and amplify their brand presence, thereby shaping the evolving landscape of the meat substitutes market.

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:

The Nisshin Oillio Group, Ltd.  
E.I. Du Pont De Nemours and Company  
Archer-Daniels-Midland Company  
Amy's Kitchen  
Conagra Brands, Inc.  
Quorn Foods  
Cauldron Foods  
Campbell Soup Company  
VBites Foods Limited  
Blue Chip Group, Inc.  
Field Roast Grain Meat Co., Inc.  
Garden Protein International  
LightLife Foods  
Sweet Earth Foods



MGP Ingredients Inc.  
The Tofurky Company, Inc.  
Meatless  
Sonic Biochem Extraction Pvt. Ltd.

#### Recent Developments:

In December 2021, Quorn Foods announced the release of five new plant-based products, including Southern Fried Wings, Garlic and Herb Bites, Creamy Korma Bites, Jerk Mini Fillets, and Sweet Chilli Mini Fillets. Three of these new products are vegan offerings. These releases were part of Quorn's preparation for Veganuary 2022 and their planned expansion in the United States.

In 2023, VBites founder Heather Mills has acquired the assets of alt-meat maker Plant and Bean to expand their operations in the meat substitutes industry.

#### Key Questions Answered in This Report

1. What was the size of the global meat substitutes market in 2023?
2. What is the expected growth rate of the global meat substitutes market during 2024-2032?
3. What are the key factors driving the global meat substitutes market?
4. What has been the impact of COVID-19 on the global meat substitutes market?
5. What is the breakup of the global meat substitutes market based on the type?
6. What is the breakup of the global meat substitutes market based on the source?
7. What is the breakup of the global meat substitutes market based on the category?
8. What is the breakup of the global meat substitutes market based on the distribution channel?
9. What are the key regions in the global meat substitutes market?
10. Who are the key players/companies in the global meat substitutes market?

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