

## Meat Substitutes: Inc Impact of COVID-19 - UK - November 2020

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“While lapsing during the COVID-19 pandemic, the meat reduction movement is expected to quickly rebound, driven by its perceived benefits related to health, weight management, sustainability and money-saving. However, meat substitutes must really deliver on these factors to reap the rewards from this trend.”

– **Emma Clifford, Associate Director – Food and Drink Research UK**

This report looks at the following areas:

This report will look at the following:

- The impact of COVID-19 on the meat substitutes market.
- The outlook for the market in the re-emergence from the pandemic and recovery up to 2025.
- The latest new product development (NPD) trends.
- Consumers' habits around meat eating and benefits associated with eating less meat.
- Consumer behaviour surrounding and attitudes towards meat substitutes.

Consumers have widespread misgiving over soy. Among users 50% prefer meat substitutes that use sources of protein other than soy, while among non-users 43% say that the use of soy puts them off trying these products. This stands in contrast to soy-based proteins still being the most popular type in meat substitute launches and points to strong potential for alternatives.

Despite people relaxing their flexitarian habits during the COVID-19 pandemic, growth of meat substitutes retail sales accelerated in 2020, helped by the seismic shift from foodservice and catering to retail. The latest waves of lockdowns in early 2021 will support sales by ensuring at-home meal occasions remain high. The meat reduction trend is expected to quickly rebound after the threat of the pandemic fades thanks to the money-saving, health and environmental benefits linked to eating less meat. This will drive further growth in meat substitutes over the next five years.

The ingrained perceptions of meat substitutes being overpriced and too processed present major challenges to the market, these favouring using whole plant foods in meat-free meals. These concerns will be exacerbated by the re-energised health trend and income squeeze in the wake of the pandemic. A sharper focus on nutritional excellence and clean labels is needed in this category.

Fuelled by pervasive media coverage on this topic, awareness that eating less meat is better for the environment has leapt ahead. With the COVID-19 crisis putting an even greater spotlight on sustainability issues, this presents a major opportunity for the market. However, more clarity and a sense of scale of the impact that switching will make is needed to add more impetus to motivations to switch from meat products to meat substitutes.

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## Table of Contents

### Overview

- Key issues covered in this report
- Impact of the January lockdown and the vaccination rollout
- Products covered in this Report

### Executive Summary

#### Impact of COVID-19 on meat substitutes

Figure 1: Short, medium and long term impact of COVID-19 on meat substitutes, 11 February 2021

#### The market

#### Market size and forecast

Figure 2: Market size and forecast for retail value sales of meat substitutes, 2015-25

#### Chilled steals share from frozen

Figure 3: UK retail value sales of meat substitutes, by segment, 2018-20

#### The environmental impact of meat production remains in the media glare

#### A spotlight on the link between meat production and pandemic

#### Impacts of Brexit could be detrimental to sales of meat

#### Companies and brands

#### Quorn's share takes a big hit in chilled, The Tofoo Co is the star performer

Figure 4: Leading brands' value sales in the UK chilled meat substitutes market, 2018-20

#### Private label closes the gap on brands in NPD; frozen rebounds in 2020; use of proteins other than soy rises

#### Adspend is up year-on-year in Q1-Q3 2020; Quorn puts focus on sustainability

#### The consumer

#### 2020 marks a reversal in the meat reduction trend

Figure 5: Meat eating habits, 2017-2020

#### Awareness of environmental benefits of eating less meat has shot up

Figure 6: Benefits associated with eating less meat, July 2018 and September 2020

#### Half of adults eat meat substitutes

Figure 7: Frequency of eating meat substitutes, by meat eating habits, September 2020

#### Weekday evening meals are the primary usage occasion

Figure 8: Usage occasions for meat substitutes, September 2020

#### The market is marred by an overpriced and processed image; the use of soy is a deterrent

Figure 9: Non-users' behaviours related to meat substitutes, September 2020

#### Demand for more transparency over environmental benefits; users are divided over preference for vegan products

Figure 10: Users' behaviours related to meat substitutes, September 2020

#### Products which match meat on nutrition resonate widely; green packaging is needed to carve a holistically sustainable image

Figure 11: Attitudes towards meat substitutes, September 2020

### Issues and Insights

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Carbon footprints can help meet demand for more transparency over environmental benefits  
 Dialling up associations with indulgence through NPD would be timely  
 Scope to push links to the feelgood factor linked to meat reduction

## The Market – Key Takeaways

The pandemic added more fuel to the market’s explosive growth  
 Chilled steals share from frozen  
 Volumes expected to dip in 2021 before continuing on an upward trajectory  
 The environmental impact of meat production remains in the media glare  
 A spotlight on the link between meat production and pandemic  
 Impacts of Brexit could be detrimental to sales of meat

## Market Size and Forecast

Impact of COVID-19 on meat substitutes  
 Figure 12: Short, medium and long term impact of COVID-19 on meat substitutes, 11 February 2020

The pandemic added more fuel to the market’s explosive growth  
 Figure 13: Retail market size for meat substitutes, 2015-2025 (prepared on 11 February 2020)

Volumes expected to dip in 2021 before continuing on an upward trajectory  
 The meat reduction trend is set to rebound

Growth is predicted to slow towards the end of the five-year period  
 Figure 14: Forecast of UK retail value sales of meat substitutes, 2015-25  
 Figure 15: Forecast of UK retail volume sales of meat substitutes, 2015-25

Market drivers and assumptions  
 Figure 16: Key drivers affecting Mintel’s market forecast, 2015-2025 (prepared on 11 February 2021)

Learnings from the last recession  
 Figure 17: Value sales of meat-free foods, 2008-12

## Market Segmentation

Chilled steals share from frozen  
 Figure 18: UK retail value and volume sales of meat substitutes, by segment, 2018-20

The shift towards chilled accelerated in 2020  
 The future looks rosy for frozen meat substitutes

Sausages and tofu see the strongest volume growth in chilled  
 Figure 19: UK retail value and volume sales of chilled meat substitutes, by sub-segment, 2019-20

Value growth across the board in frozen; burgers see biggest boost  
 Figure 20: UK retail value and volume sales of frozen meat substitutes, by sub-segment, 2018-20

## Market Drivers

Impact of the wave of early 2021 lockdowns  
 The environmental impact of meat production remains in the media glare  
 UK health professions push for climate tax on meat  
 Soya is also linked to deforestation

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A spotlight on the link between meat production and pandemic  
 Impacts of Brexit are likely to be detrimental to sales of meat  
 The risk of a no-deal Brexit has been averted  
 Concerns over changes to standards for meat arising from Brexit

## Companies and Brands – Key Takeaways

Intensifying competition take its toll on market leader Quorn  
 Quorn’s and Linda McCartney’s stronghold weakens as competition heats up  
 Private label closes the gap on brands in NPD with a raft of launch activity  
 Following boom in chilled NPD in 2019, activity in frozen rebounds in 2020  
 More meat-free activity from meat-based brands  
 Use of wheat and pea proteins rises  
 Adspend is up year-on-year in Q1-Q3 2020  
 Quorn puts the focus on sustainability in new Step in the Right Direction campaign

## Market Share

Intensifying competition take its toll on market leader Quorn  
 Quorn’s share takes a big hit in 2020  
 The Tofoo Co is the star performer among leading brands  
 Figure 21: Leading brands’ sales and shares in the UK chilled meat substitutes market, by value and volume, 2018-2020  
 Quorn’s and Linda McCartney’s stronghold on the market weakens; Birds Eye’s sales boom  
 Other brands also steal share  
 Figure 22: Leading brands’ sales and shares in the UK frozen meat substitutes market, by value and volume, 2017/18-2019/20

## Launch Activity and Innovation

Meat substitutes launch activity plateaus in 2020; meat regains share  
 Figure 23: Share of new launches in the processed meat, poultry, fish, meat substitutes and egg products market, by segment, 2016-20  
 Private label closes the gap on brands with a raft of launch activity  
 Figure 24: Share of new launches in the meat substitutes market, by branded versus own-label, 2016-20  
 Asda unveils Plant Based sub-brand  
 Figure 25: Selection of launches from Asda’s Plant Based range, 2020  
 Sainsbury’s launches Plant Pioneer range  
 Figure 26: Selection of launches from Sainsbury’s Plant Pioneer range, 2020  
 The Co-op introduces the GRO range  
 Figure 27: Selection of launches from Co-op’s GRO range, 2020  
 Major expansion for M&S Plant Kitchen range in 2020  
 Morrisons expands V Taste range with ‘fake meat’  
 Aldi renames vegan range Plant Menu to make it more inclusive and adds new products  
 Figure 28: Selection of vegan launches from M&S, Morrisons and Aldi, 2020  
 Following boom in chilled NPD in 2019, activity in frozen rebounds  
 Figure 29: Share of new launches in the meat substitutes market, by storage type, 2016-20

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## A flurry of new vegan pastry-based launches

Figure 30: Selection of vegan launches from Iceland, The Fry Family Food Co and Birds Eye Green Cuisine, 2020

## More activity in vegan 'fish'

Figure 31: Launches of vegan alternatives to fish, 2019-20

## Richmond expands its meat-free range

## Finnebrogue forays into meat-free under its Naked brand

Figure 32: Meat substitute launches from meat brands, 2020

## Use of wheat and pea proteins rises

Figure 33: Share of new launches in the meat substitutes, by type of protein included as an ingredient, by top 10 (ordered by 2020), 2016-20

## Meatless Farm replaces soy in its sausages and burgers

## Oats get more visibility

Figure 34: Gold&Green Pulled Oats Tomato Mince, UK, 2020

## Advertising and Marketing Activity

### Adspend is up year on year in Q1-Q3 2020

Figure 35: Total above-the line, online display and direct mail advertising expenditure on meat substitutes, 2019-20

### Marlow Foods continues to lead adspend, but loses share in 2020

Figure 36: Total above-the line, online display and direct mail advertising expenditure on meat substitutes, by leading advertisers, 2019-20

### Quorn unveils Step in the Right Direction campaign ...

... but ad is banned by ASA

Educational campaign from Quorn

Veganuary launches TV campaign in 2020

Cauldron unveils own campaign for Veganuary

The Meatless Farm launches its biggest campaign to date

Allplants launches TV ad

Nielsen Ad Intel coverage

## The Consumer – Key Takeaways

2020 marks a reversal in the meat reduction trend

Awareness of environmental benefits of eating less meat has shot up

Half of adults eat meat substitutes

Weekday evening meals are the primary usage occasion

The market is marred by an overpriced and processed image

The use of soy is a deterrent

Demand for more transparency over environmental benefits

Users are divided over preference for vegan products

Products which match meat on nutrition resonate widely

Green packaging is needed to carve a holistically sustainable image

## Impact of COVID-19 on Consumer Behaviour

The comforting, versatile and family-friendly nature of processed meat has come to the fore

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Health and weight management become higher priorities

COVID-19 brings environment into further spotlight

A financial squeeze will fuel meat reduction; meat substitutes' overpriced image will be problematic

Rise in home cooking favours the use of ingredients over meat substitutes

Restrictions on the hospitality sector and consumers curbing visits will boost the appeal of more indulgent food

Figure 38: Feeling comfortable about going to restaurants/bars indoors, 25 June-1 October 2020

## Meat Eating Habits

2020 marks a reversal in the meat reduction trend

Figure 39: Meat eating habits, 2017-20

The pandemic has caused a relaxation of some habits, including flexitarianism

However, this movement is set to rebound quickly

Flexitarianism is strongest among more affluent consumers

Figure 40: Meat eating habits, by socio-economic group and household income, September 2020

Veganism remains very niche

Figure 41: Diets followed by non-meat/poultry eaters, September 2020

## Benefits Associated with Eating Less Meat

Half of adults associate at least two benefits to eating less meat

Figure 42: Number of benefits associated with eating less meat, September 2020

Awareness of environmental benefits has shot up ...

... with its relevance increasing since the pandemic

Figure 43: Benefits associated with eating less meat, July 2018 and September 2020

Figure 44: Benefits associated with eating less meat, by meat eating habits, September 2020

Emotional benefits are effective in driving usage of meat substitutes

Scope to push links to the feelgood factor

## Usage of Meat Substitutes

Half of adults eat meat substitutes

Figure 45: Usage of meat substitutes, by age and gender, September 2020

Usage is highest among non-meat eaters and limiters/reducers

Figure 46: Usage of meat substitutes, by meat eating habits, September 2020

Overall meat substitutes have low usage frequency

Figure 47: Frequency of eating meat substitutes, by meat eating habits, September 2020

Uncooked meat substitutes are most popular

Figure 48: Usage of meat substitutes, by type, September 2020

## Usage Occasions for Meat Substitutes

Weekday evening meals are the primary usage occasion

Figure 49: Usage occasions for meat substitutes, September 2020

Scope to build on breakfast, lunch and snacking occasions

## Non-users' Behaviours Related to Meat Substitutes

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The market is marred by an overpriced and processed image

A stronger focus should be put on clean label

Products need to boost their value credentials

Figure 50: Non-users' behaviours related to meat substitutes, September 2020

The use of soy is a deterrent

Figure 51: Rainforest-free soya on-pack label on Alpro Soya Drink for Hot Beverages, 2020

## Users' Behaviours Related to Meat Substitutes

Demand for more transparency over environmental benefits

Carbon footprints can help to disentangle complex sustainability issues

Figure 52: Behaviours related to meat substitutes, September 2020

Users are divided over preference for vegan products

There is room for products from both meat and meat substitute brands

## Attitudes towards Meat Substitutes

Products which match meat on nutrition resonate widely

High demand for substitutes to deliver nutritional benefits

Only 6% of launches call out vitamin B12

Figure 53: Attitudes towards meat substitutes, September 2020

Opportunities around UK provenance

Figure 54: Attitudes towards meat substitutes, by usage of meat substitutes, September 2020

Green packaging is needed to carve a holistically sustainable image

## Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

## Appendix – Market Size and Forecast

Forecast Methodology

Figure 55: UK value sales of meat substitutes, best- and worst-case forecast, 2020-25

Figure 56: UK volume sales of meat substitutes, best- and worst-case forecast, 2020-25

## Appendix – Market Share

Figure 57: Leading manufacturers' sales and shares in the UK chilled meat substitutes market, by value and volume, 2018-20

Figure 58: Leading manufacturers' sales and shares in the UK frozen meat substitutes market, by value and volume, 2017/18-2019/20

## Appendix – Launch Activity and Innovation

Figure 59: Share of new launches in the meat substitutes carrying a vegan claim, 2016-20

Figure 60: Share of new launches in the meat substitutes carrying selected claims, by claim, 2016-20

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