

Europe Meat Substitutes - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Meat Substitutes Market size is estimated at 3.55 billion USD in 2025, and is expected to reach 6.13 billion USD by 2030, growing at a CAGR of 11.55% during the forecast period (2025-2030).

Emerging trends in the consumption of meat substitutes among flexitarians in Europe are driving the market

- Approximately 19% of flexitarians in European countries consumed tofu, tempeh, or seitan on a weekly basis, typically ranging from one to three times per week, in 2021. Around 10% of consumers in Europe consume tofu more than four times a week. The rising awareness of the health benefits associated with tofu consumption has also contributed to its increasing demand. Tofu is low in saturated fat, is cholesterol-free, and is a good source of essential nutrients like calcium and iron. It is often considered a healthier alternative to meat-based protein. The tofu segment is anticipated to register a CAGR of 10.97% by value during the forecast period.
- Based on type, textured vegetable protein (TVP) is the most widely consumed meat alternative. It accounted for a segmental volume of 16% in 2022. Its extensive application in producing different types of meat alternatives drives its sales. Regional manufacturers like Cargill, Ingredion, and ADM are augmenting the production of textured soy protein or pea protein for the meat alternatives industry. These companies are projected to support the growth of the European meat substitutes market further. The demand for pea-based TVP is growing rapidly, which is driving market players to create more non-soy-based, gluten-free meat alternatives.
- Tempeh is projected to record the fastest CAGR of 11.17% in terms of value during the forecast period. Manufacturers have introduced several tempeh products, such as organic tempeh, curry tempeh pieces, Mediterranean tempeh pieces, BBQ tempeh pieces, and smoky tempeh rashers, which is anticipated to boost the growth in the region. Moreover, players in the region are

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partnering with retail players to market their tempeh products.

Rise in vegan and flexitarian population boosts market growth

- The growth trend of the consumption of meat substitutes in Europe was static till 2021. It is expected to gain momentum rapidly during the forecast period. In 2022, 18-21% of the total European population was flexitarian, consisting of people who consumed meat and fish less frequently compared to traditional omnivores. People are slowly moving toward the consumption of meat substitutes to fulfill their protein requirements. The flexitarian population is further expected to increase to around 29-33% due to factors like environmental safety and sustainable diets. The flexitarian population has a significant impact on the meat substitute market as it is the largest dietary group after omnivores.
- The United Kingdom is the largest consumer of meat substitutes in the region and is expected to be the fastest-growing meat substitute market in Europe. It is projected to register a CAGR of 10.92% in value during the forecast period. There is an increasing availability of meat substitutes in supermarkets and country pubs, which is aiding the growth of the meat substitute market. Gen Z accounted for around 14-16% of the total population of the United Kingdom in 2022. The Gen Z population in the country is eager to try out the latest trends, such as the consumption of plant-based food and veganism, promoting the growth of the European meat substitute market during the forecast period.
- The Rest of Europe consumes meat substitutes primarily due to the shift to a more plant-based diet for better health and for the sake of the environment. Many consumers in countries like Sweden consume only vegetarian food, including meat substitutes, for about two to six times a week.

Europe Meat Substitutes Market Trends

Higher price is observed as a major constraint in purchasing plant-based products

- The price of tempeh has been gradually increasing over the years, mostly to combat inflation and a minimal increase in soybean prices. In Europe, the price of tempeh increased by 2.61% from 2017 to 2022. Due to rising soybean output in the region, the price of soybeans has remained consistent, which has contributed to the stability of tempeh prices.
- In Europe, soybean production increased by 9.16% from the previous season to reach 11.56 million tons in 2021. Other than soybeans, raw materials like chickpeas are also widely used to produce tempeh. The price of chickpeas is higher than soybeans. As there is hardly any production of chickpeas in European countries like Germany, these countries depend entirely on imported chickpeas. As per a study released by Proveg International (an NGO promoting plant-based food) on plant-based foods, price was the main area of dissatisfaction for consumers, including both plant-based eaters and reducers. Consumers have perceived plant-based foods as too expensive and believe that the industry should lower the price point to make them available to a broader consumer base.
- The price of tempeh was about 27% more than tofu in 2022, owing to the lower popularity of tempeh in the European market compared to tofu. Among major European countries, Italy and Germany witnessed the highest tempeh prices, amounting to about 24%, more than the lowest price in the region, in 2022. The bigger vegan populations have led to higher demand for the product in these countries. Accordingly, a rise in the offering of hand-made tempeh was observed in these markets, which contributed to the higher prices. The price of processed tempeh, such as tempeh soy fillet and marinated tempeh, was almost 5-7% higher than plain tempeh in 2022.

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Europe Meat Substitutes Industry Overview

The Europe Meat Substitutes Market is fragmented, with the top five companies occupying 12.17%. The major players in this market are Amy's Kitchen Inc., Beyond Meat Inc., Conagra Brands Inc., House Foods Group Inc. and International Flavors & Fragrances Inc. (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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