

Plant-Based Meat Products

ANMD-MRS13-121 · Sustainable Food & Alternative Protein Technologies

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Plant-based meat products are the most commercially mature wing of alternative protein — the burgers, sausages, poultry analogs and whole-cut products that recreate the taste, texture and convenience of meat from soy, pea and wheat proteins. After a hype-and-correction cycle, the category is recalibrating around taste parity, clean labels and price competitiveness. This decision-grade study sizes the global market three ways — value, volume (tonnes/kg) and products/SKUs — across product type, protein source and channel, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Plant-based meat's core claim is lower land, water and greenhouse-gas footprint than conventional meat, alongside food-security and animal-welfare benefits.

Mapped Sustainable Development Goals:

SDG 2 Zero Hunger	SDG 3 Good Health & Well-Being	SDG 12 Responsible Consumption	SDG 13 Climate Action	SDG 15 Life on Land
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Measurable sustainability outcomes assessed:

- Lower land, water and greenhouse-gas footprint
- Food-security and animal-welfare benefits
- Mainstream parity on taste and price
- Ultra-processing perception, LCA-claim and packaging as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	20+ Companies Profiled	5 SDGs Mapped

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. North America leads brand value; Europe is the most penetrated market; Asia Pacific is the growth frontier; other regions assessed on their own merits.

MARKET OVERVIEW

From hype-and-correction to durable demand — where taste-and-price parity gates mainstream repeat purchase.

Plant-based meat is maturing past its first growth wave. Demand is driven by health, climate and flexitarian trends, but tempered by taste, price and ultra-processed-label scrutiny — with reformulation toward clean labels and cost parity central to renewed growth. The market is read three ways — value, volume and products/SKUs — and forecast under four scenarios, each region reported separately.

- **North America leads brand value** — United States, anchored by the major pure-play and CPG brands
- **Europe is the most penetrated market** — the Netherlands, the UK and Switzerland, with supportive consumer attitudes
- **Asia Pacific is the growth frontier** — regional brands and Western entrants target large, protein-hungry markets
- **Taste-and-price parity is the differentiator** — matching conventional meat on flavour, texture and cost is the gate to mainstream repeat purchase

REGIONAL OUTLOOK

Across seven reporting regions, the report separates leading markets from high-growth and emerging ones — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
North America	Brand-value leader	United States — major pure-play & CPG brands
Europe	Most penetrated	Netherlands, UK, Switzerland — supportive consumer attitudes
Asia Pacific	Growth frontier	China, Australia — regional brands & Western entrants
Latin America	Emerging	Brazil — protein majors & regional plant-based brands
Africa	Frontier	South Africa — early retail adoption
Middle East	Emerging	UAE, Israel — import & local plant-based growth

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> • Flexitarian, health & climate trends • Retail & foodservice distribution growth • Taste, texture & format innovation • Corporate & policy sustainability goals • Scaling economies lowering price 	<ul style="list-style-type: none"> • Taste & price gap vs conventional meat • Ultra-processed & clean-label scrutiny • Category sales plateau & shakeout • Commodity & ingredient cost inflation • Consumer-perception & repeat-purchase risk

SEGMENTATION SNAPSHOT

By Product Type	Burgers & ground analogs · sausages & links · chicken & poultry analogs · whole-cut analogs · deli & processed
By Protein Source	Soy · pea · wheat / blends
By Channel	Retail / CPG · foodservice · ingredient / B2B
By End User	Food brands · manufacturers · retail · foodservice
By Format	Frozen · chilled · ambient
By Business Model	Branded products · ingredient supply · licensing

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

- > Chapter 1. Scope, Methodology and Report Architecture
- > Chapter 2. Industry Discovery Summary — Plant-Based Meat Products
- > Chapter 3. Executive Intelligence and Decision Dashboard
- > Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- > Chapter 5. Industry Overview and Market Evolution
- > Chapter 6. Market Dynamics
- > Chapter 7. Global Market Size and Forecast, 2020–2032
- > Chapter 8. Market Segmentation Analysis
- > Chapter 9. End-User and Demand-Side Intelligence
- > Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

- > Chapter 11. Global Regional Intelligence Framework
- > Chapter 12. North America Market Intelligence
- > Chapter 13. Europe Market Intelligence
- > Chapter 14. Asia Pacific Market Intelligence
- > Chapter 15. Latin America Market Intelligence
- > Chapter 16. Africa Market Intelligence
- > Chapter 17. Middle East Market Intelligence
- > Chapter 18. Rest of World Market Intelligence

Part IV — Technology, Innovation and Category-Specific Intelligence

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- > Chapter 20. Emerging and Next-Generation Technology Intelligence
- > Chapter 21. Category-Specific Intelligence Module
- > Chapter 22. Research, Innovation and Funding Landscape

Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
- › Chapter 30. ESG and Sustainability Framework Alignment
- › Chapter 31. SDG Intelligence
- › Chapter 32. Carbon, Net-Zero and Climate-Mitigation Intelligence
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- › Chapter 34. Circular Economy and Resource-Security Intelligence
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Part VII — Supply Chain, Policy, Legal, Economics and Finance

- › Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
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Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

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- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans pure-play challengers, food multinationals and protein majors. Deal activity — reformulation launches, foodservice partnerships and category consolidation — signals a market shaking out toward taste-and-price leaders.

Representative players profiled in the full report:

Beyond Meat, Inc. · Impossible Foods Inc. · Nestlé S.A. (Garden of Eatin') · Kerry Group plc · Unilever PLC (The Vegetarian Butcher) · Maple Leaf Foods Inc. · Conagra Brands, Inc. (On the Border) · and further profiled players across pure-plays, multinationals and protein majors.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a conditional investment view.

KEY QUESTIONS THIS REPORT ANSWERS

- How large is the global plant-based meat market, and how fast will it grow to 2032?
- Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- How does taste-and-price parity change mainstream repeat purchase?
- Who leads, and where is the competitive and patent white space?
- Is the investment case bankable — and under what conditions?
- How does the category align with the SDGs, nutrition perception and LCA-claim integrity?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability view in a single architecture.

- **Triangulated sizing** — every market read three ways so value, volume and the physical-unit views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, conditional investment view.

WHO SHOULD BUY THIS REPORT

Investors, food brands, manufacturers, ingredient suppliers, retailers, foodservice and policymakers, and strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.