

Nutrition & Health INSIGHT

Meat

January 2014

**Meat
substitutes
market
Latest trends**



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Swelite® key selling points

Swelite®
making the most of meat



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Meat

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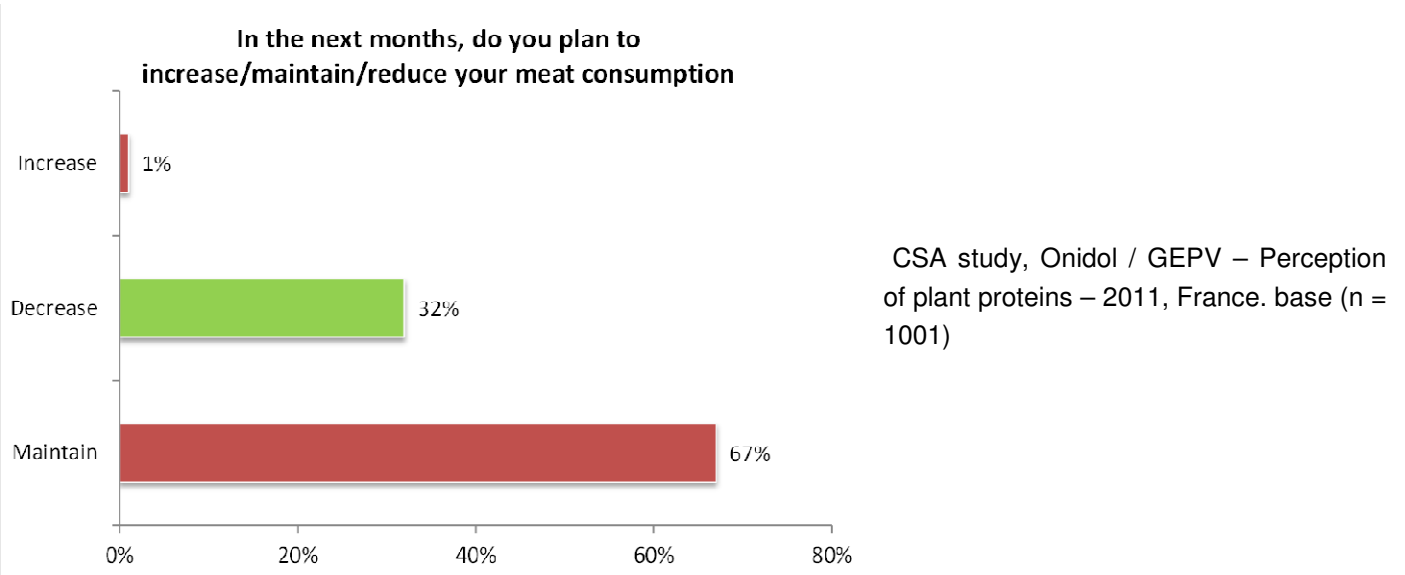
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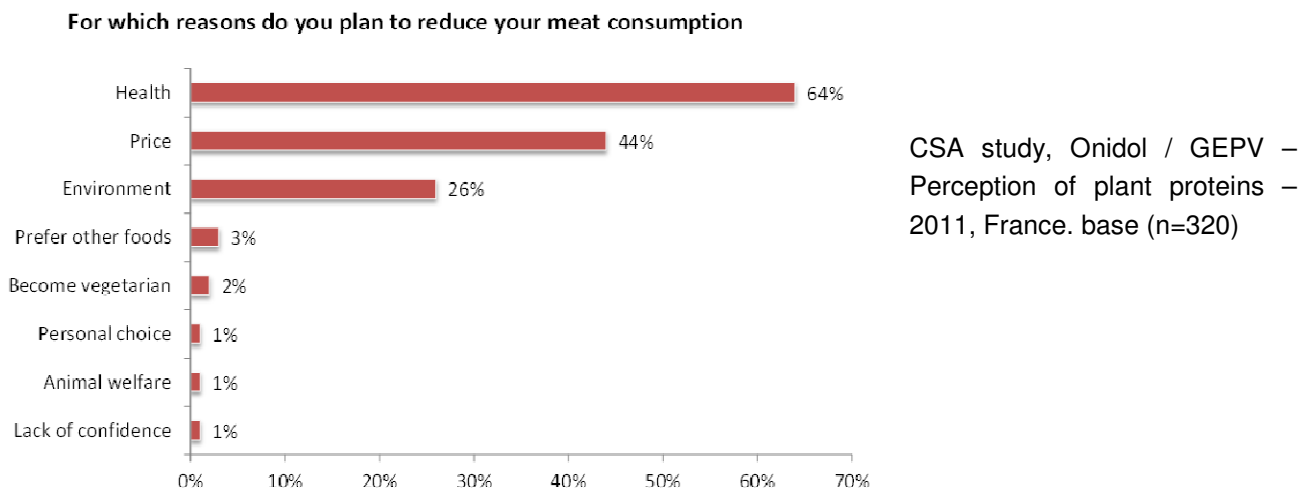
Cosucra, partner to your success

Meat / Part 1 - Market dynamics

In developed countries, many factors (economics, lifestyle, health and environmental reasons,...) are leading consumers to review their meat consumption habits. More and more consumers want to reduce their meat intake. They are sometimes called “flexitarians” and “meat-reducers”. They are not vegetarians but they try to have one or several meat-free days on the week.



The main reasons to reduce meat intake are health, price and environment reasons, far before ethical reasons.



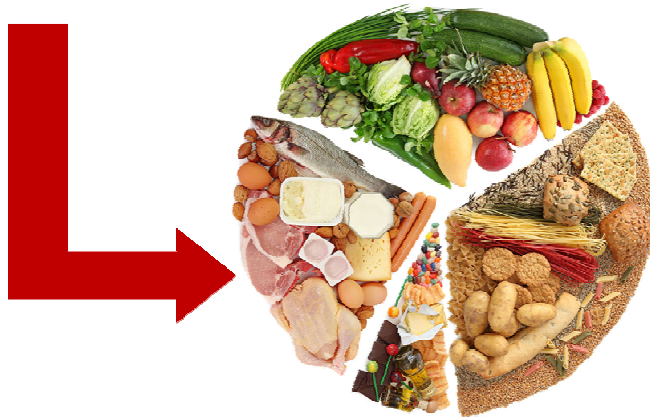
As a consequence, more and more non vegetarians buy meat replacement products, especially in households with children and by younger people. In US, while 7% of Americans identify themselves as vegetarian, 36% of shoppers buy meat alternatives (Mintel, 2013).

Furthermore, as the product offer enlarges and has made big progress in terms of taste and quality, increasingly more consumers enjoy the taste and use them to add variety in their meals.

Meat / Part 2 - Products dynamics

Meat replacement products definitions

Meat replacement products have an equivalent dietary role to meat and are a key source of protein in meat-free diets.



2 product types can be distinguished:

⇒ **meat alternatives:** made from vegetables, wheat, and/or eggs and cheese.



Vegetable patties—Bonduelle(France)



Spicy black bean slider with sweet corn—Sol cuisine (US)



Vegetable pancakes—Oh céréales(France)



Courgette medallions—Findus (Italy)

⇒ **meat analogues** where plant-based ingredients (typically soy or wheat) are formulated into products that closely mimics meat in appearance, texture and taste.



Meatless chicken bites—Quorn (US)



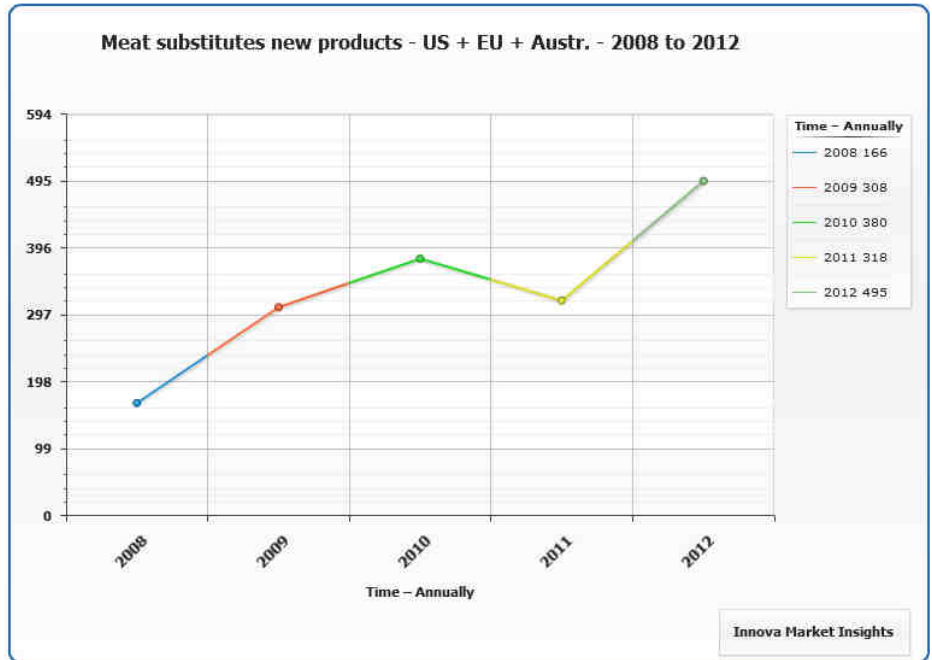
Vegetarian meatballs in sauce—Bean supreme (Australia)



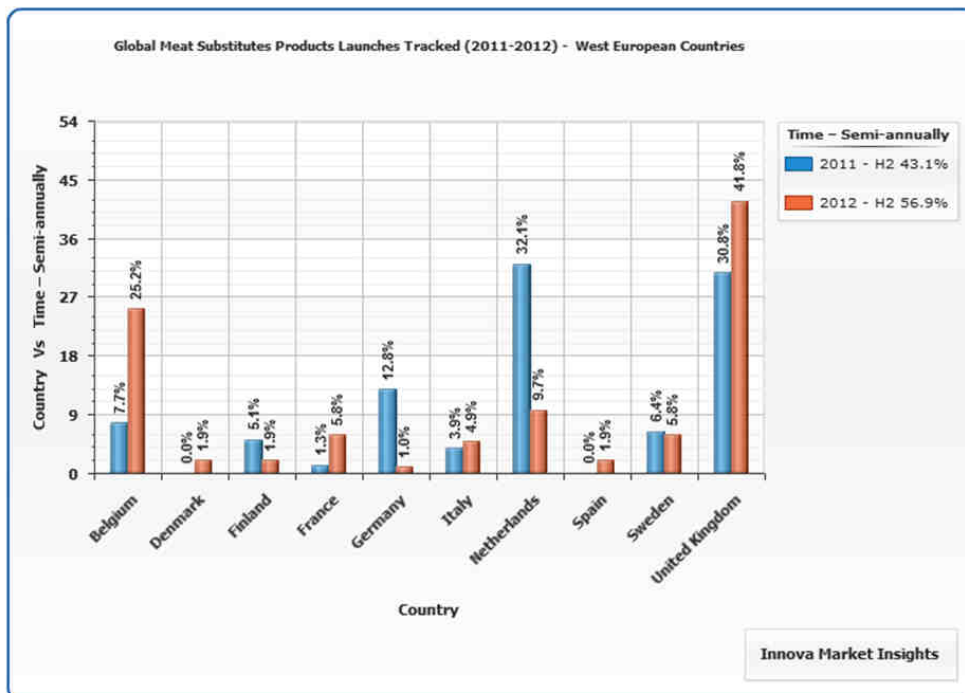
Vegetarian fillet—Albert Heijn (Netherlands)

Meat / Part 2 - Products dynamics

Numerous products have been launched in the meat replacement market category during the last 5 years. What's interesting is that many products are not necessarily designed as a vegan; rather the focus is on being meat free. Many still contain animal-based ingredients including milk, cheese and eggs.



The United Kingdom is the leader in meat replacement product launch activity in Western Europe, followed by the Netherlands and Belgium. Product launch activity increased in Belgium, Denmark, France, Italy, Spain and the United Kingdom from H2 2011 to H2 2012.



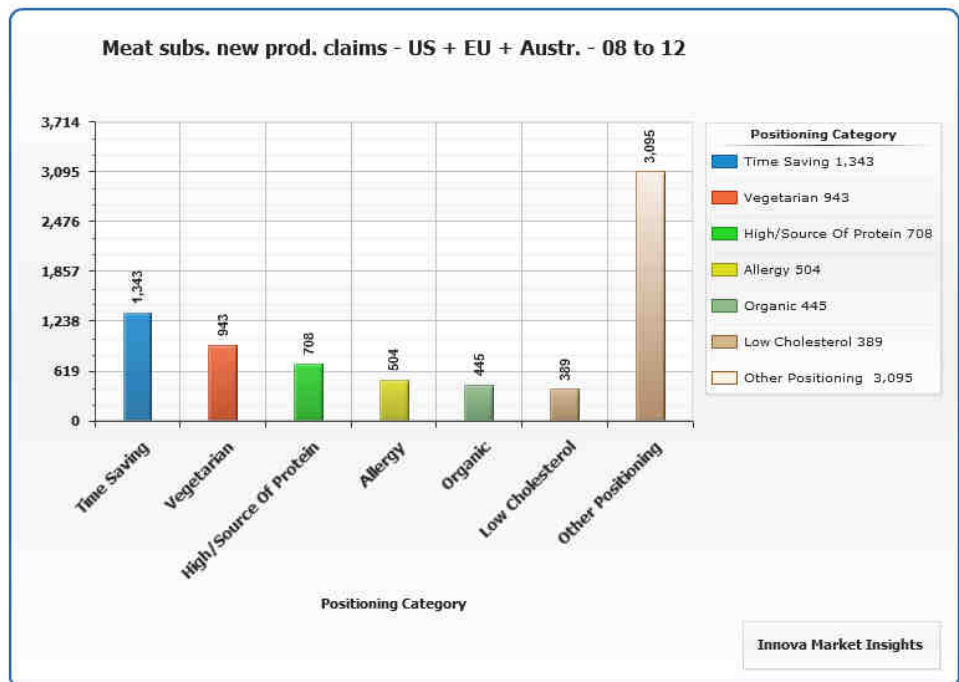
Meat / Part 3 - Latest trends in meat replacement products

The sustainability trend in recent years has driven growth of the meat replacement market, along with new product innovation making this type of products more appealing to a wide range of consumers, not just vegetarians.

The meat replacement market has been renowned for its health benefits, with high protein and low fat combinations being common claims.

The top positionings of the product are:

- TIME SAVING
- VEGETARIAN
- HIGH PROTEIN
- ALLERGY (gluten-free, egg-free...)
- ORGANIC
- LOW CHOLESTEROL



Vegetable balls (46% peas)—Tivall (Austria)

Time saving.



Vegetarian burgers—Delhaize (Belgium)

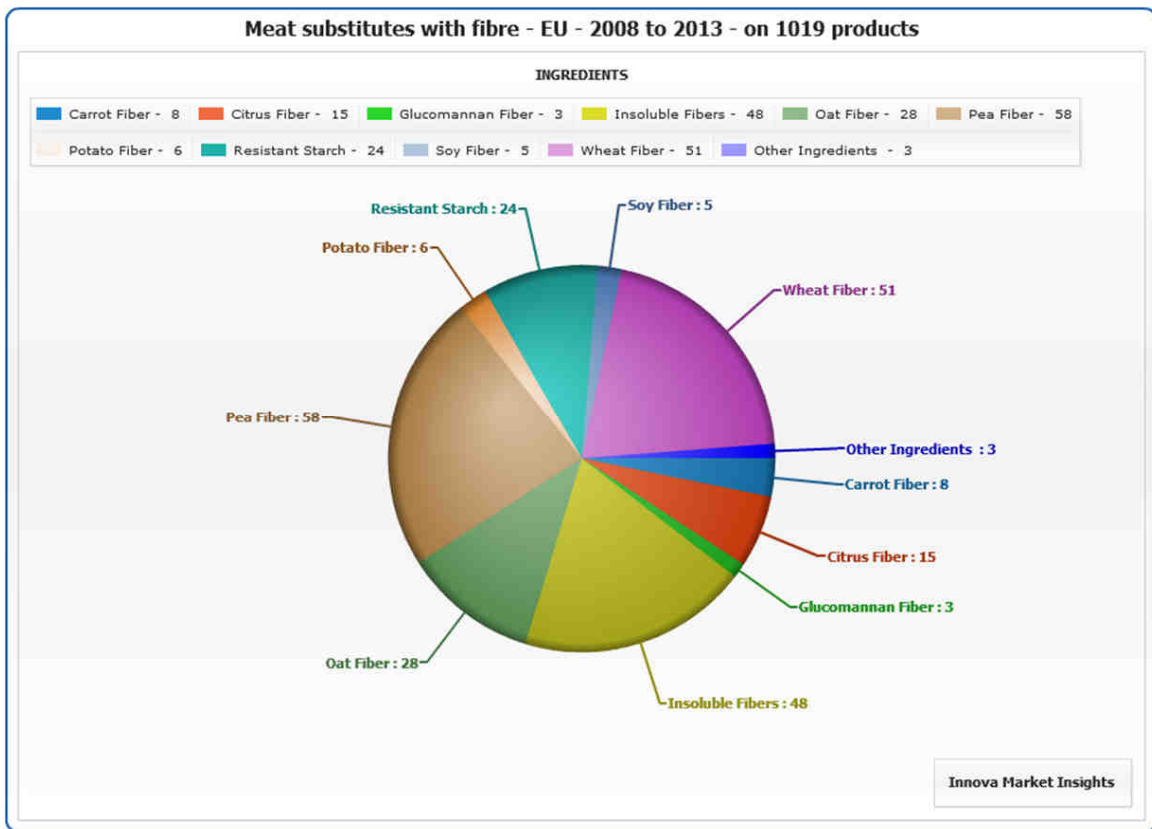
Added protein, source of fibre, time saving, vegetarian.



Chicken style nuggets—Red Wood (UK)

Vegetarian, egg-free, dairy and cholesterol-free, Kosher, Halal, organic.

Meat / Part 4 - Fibre usage in meat replacement products



Pea fibre and wheat fibre are commonly used in meat substitute products. Insoluble fiber plays an important role in supporting regularity by adding bulk to the diet.

Market examples with pea fibre



Crispy spinach, cheese and rice. Albert Heijn (Belgium)
Added Iron, Vitamin/Mineral Fortified, Time Saving, Vegetarian



Vegetable burger. Valsoia (Italy)
Source of fiber. Rich in protein. Low in saturated fat. For goodness and health.



Pork style sausages. Marlow (UK)
Low Fat, High/Source of Fibre, Time Saving, Vegetarian, High/Source of Protein



Vegetable nuggets. Winterbotham Darby (UK)
Economy, vegetarian

Meat / Part 5 - Swelite® arguments

Swelite®, a naturally sourced, functional solution for meat replacement products

Sourced from yellow pea, Swelite® pea fibre has unique properties:

- excellent water binding capacity (12 g water/g)
- water and fat stabilization 1/5/5
- neutral taste and colour
- high quality powder
- totally vegetable solution
- not listed as an allergen, gluten-free



In meat replacement products, Swelite®:

- improves the resistance to any type of cooking (frying, grill, microwaving,...)
- keeps the texture and give bite
- reduces cooking losses
- shapes the product
- improves processability (non sticky paste)
- gives the possibility of using any kind of vegetables:
 - “European” type (carrots, peas, maize, paprika, onions)
 - “Asian” type (thaï mix)
 - “Cheese” (cheese, broccoli, cauliflower)



Cosucra Groupe Warcoing

Cosucra has been processing natural ingredients since 1852. But we are not just a supplier. We partner with our customers, providing market expertise, extensive clinical research, applicative know-how and experience in regulatory affairs to help them improve existing products and develop new ones. Partnerships with more than 400 food manufacturers and more than 1,000 product references worldwide demonstrate that Cosucra works alongside clients from idea to launch and from seed to food.

*Fibruline® range - Chicory inulin
Fibrulose® range - Chicory oligofructose
Pisane® range - Pea protein isolate
Swelite® range - Pea fibre
Exafine® range - Pea hull fibre
Nastar® range - Pea native starch*



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