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Retail Scanning Data Nielsen

Plant-based foods in Europe:

How big is the market?

The Smart Protein Plant-based Food Sector Report



www.smartproteinproject.eu

Countries covered in this report









Germany













About the data (Nielsen MarketTrack)



Market

Two metrics:

- Total for each country, including discount stores.
- Total for just discount stores.

Countries: Austria, Belgium, Denmark, France, Germany, Italy, the Netherlands, Poland, Romania, Spain, United Kingdom.

Time frame

Moving annual total

(MAT) per calendar week (CW) for 2018 vs 2019 vs 2020.

Depending on the country, the calendar week varied from CW39 to CW42.

Facts

Sales value in €.

Sales volume in kilograms (Kg) or litres (L), depending on the product.

Categories

Plant-based (PB) meat, milk, yoghurt, cheese, ice cream, and fish.

Including subcategories.

Varies according to availability in each country. Not all categories are currently available in all countries.

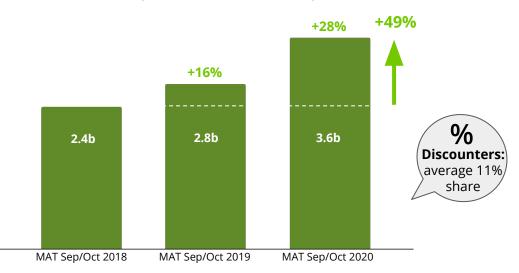
Plant-based sector overview: Europe Total sales value





Sales value increased by 49% over the past two periods.

Sales value of plant-based food* in Europe in €



^{*}Total market incl. discounters, AU (Plant-based (PB) meat, milk, yoghurt)+BE (PB meat, milk, yoghurt)+DE (PB meat, milk, yoghurt, cheese, ice cream)+FR (PB meat, milk, yoghurt, cheese, ice cream)+FR (PB meat, milk, yoghurt, cheese, ice cream)+NL (PB meat, milk, yoghurt, cheese, ice cream)+NL (PB meat, milk, yoghurt, cheese, ice cream)+NL (PB meat, milk, yoghurt, cheese, ice cream)+PR (PB meat, mi





Austria





Agenda - Austria

- 1. Key findings
- 2. Sector overview
- 3. Plant-based categories* deep dive
 - a. Plant-based meat
 - b. Plant-based plain milk**
 - c. Plant-based flavoured milk***
 - d. Plant-based yoghurt

^{*}Plant-based food categories shown here are the plant-based food categories that were available at the time of purchase.

^{**}Plant-based plain milk originally labelled 'drink/milk'.***Plant-based flavoured milk originally labelled 'drink/mixed milk'.



Key findings – Austria





The sales value of plant-based food* grew 57% (€82m) over the previous two periods, while sales volumes increased by 52% (26m Kg/L). Discount stores recorded even stronger growth, with 83% (€15m) and 82% (6m Kg/L) respectively. Discounters have an 18% share in terms of sales value.



The plant-based food sector is **led by plant-based plain milk** (€37m), followed by **plant-based meat** (€25m). The plant-based meat segment showed the strongest growth in sales value (58%).



In terms of plant-based meat (€25m), the market is dominated by plant-based meals (e.g. stir fry, schnitzel) (€8.0m). Sales shot up in the latest period, especially in discount stores.



Plant-based milk showed double digit growth (€37m) in all segments, with oat (€10m) and almond (€9.5m) being the most developed. Oat (€1.7m) and rice (€1.6m) were dominant in discount stores.



Austria has a **great variety of plant-based yoghurt** (€16m), including soya (€10m), coconut (€4.6m), almond (€1.3m), and other (Lupine, cashew, oat) (€608k).

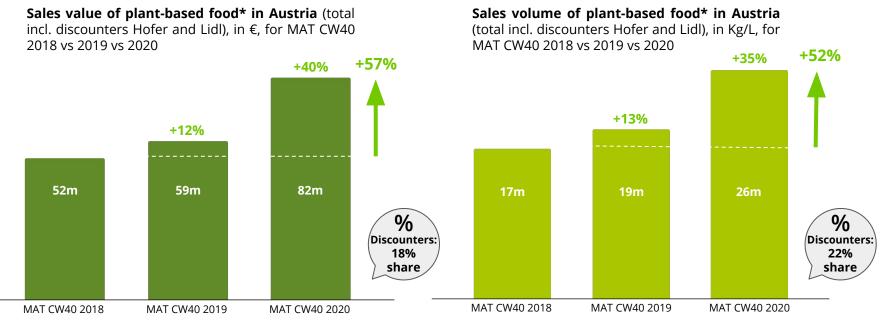


Plant-based sector overview: Austria Total sales value and sales volume





Sales value grew 57% over the past two periods, while sales volume increased by 52%.



^{*}Plant-based meat (vegan and vegetarian, no dairy-ingredients), plant-based milk (plain and flavoured), plant-based yoghurt

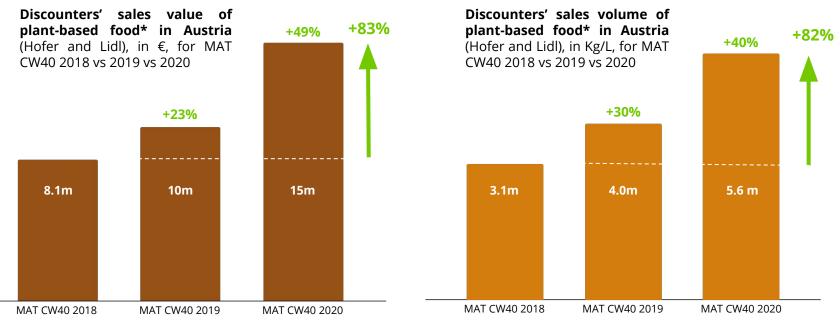


Plant-based sector overview: Austria Discounters' sales value and sales volume





Discounters experienced even stronger growth over the past two periods.



^{*}Plant-based meat (vegan and vegetarian, no dairy-ingredients), plant-based milk (plain and flavoured), plant-based yoghurt



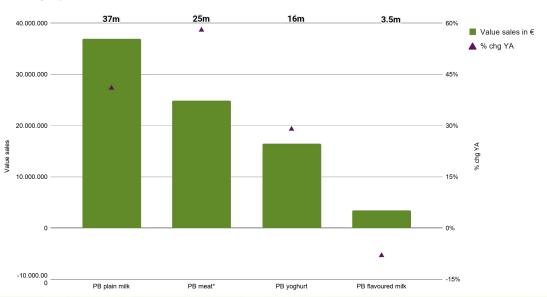
Plant-based sector overview: Austria Total sales value by category





Plant-based plain milk had the highest-value sales, followed by plant-based meat.

Sales value of plant-based food in Austria (total incl. discounters Hofer and Lidl) by category, in €, for MAT CW40 2020



*Vegan and vegetarian, no dairy-ingredients



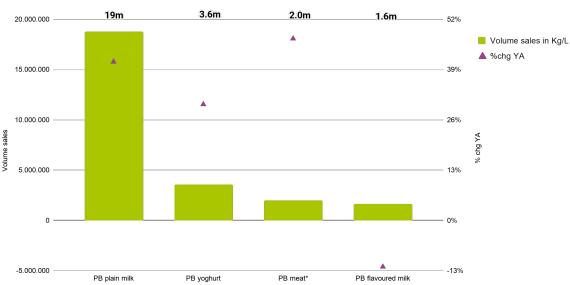
Plant-based sector overview: Austria Total sales volume by category





Plant-based plain milk once again had the highest volume sales, but this time followed by plant-based yoghurt.

Sales volume of plant-based food in Austria (total incl. discounters Hofer and Lidl) by category, in Kg/L, for MAT CW40 2020



*Vegan and vegetarian, no dairy-ingredients



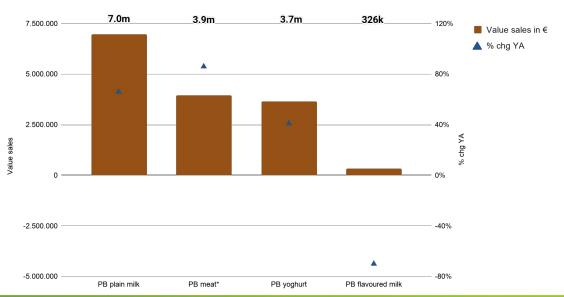
Plant-based sector overview: Austria Discounters' sales value by category





Plant-based plain milk also had the highest value sales in discount stores, with all three leading categories experiencing huge growth.

Discounters' sales value of plant-based food in Austria (Hofer and Lidl) by category, in €, for MAT CW40 2020





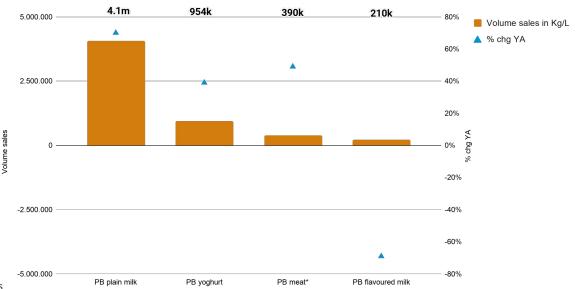
Plant-based sector overview: Austria Discounters' sales volume by category





There is a similar picture in terms of discounter's sales volume, with tremendous growth for all three leading categories.

Discounters' sales volume of plant-based food in Austria (Hofer and Lidl) by category, in Kg/L, for MAT CW40 2020





Plant-based sector deep dive: Austria

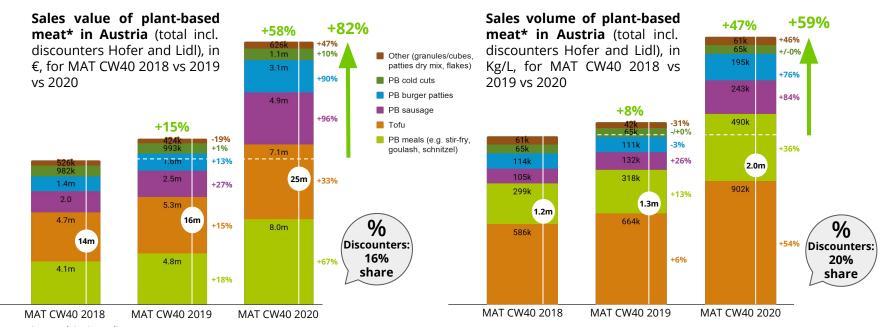


Plant-based sector deep dive: Austria Total plant-based-meat sales





Plant-based meals (such as stir-fry and schnitzel) had the highest sales value out of all plant-based-meat products.



*Vegan and vegetarian, no dairy-ingredients

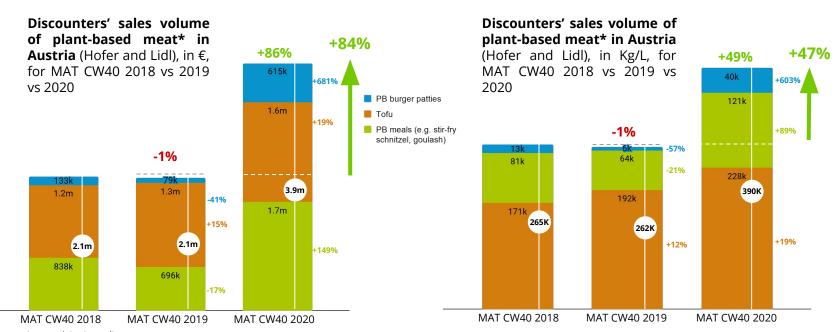


Plant-based sector deep dive: Austria Discounters' plant-based-meat sales





In discount stores, the plant-based meat sector is also dominated by plant-based meals (such as stir-fry and schnitzel).



*Vegan and vegetarian, no dairy-ingredients

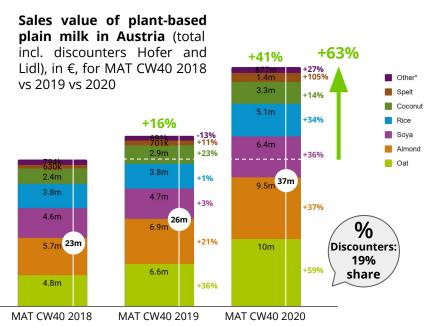


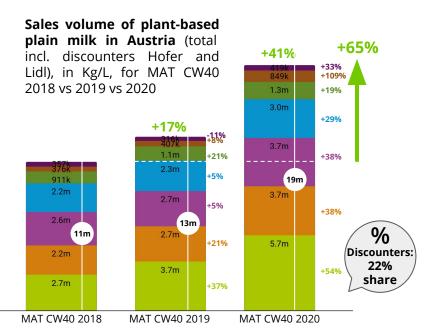
Plant-based sector deep dive: Austria Total plant-based plain-milk sales





The plant-based plain milk segment is dominated by oat, almond, and soya.





*Other includes hazelnut, soya/rice blend, buckwheat, cashew, pea, millet, lupine, hemp, quinoa, flax seed, grain

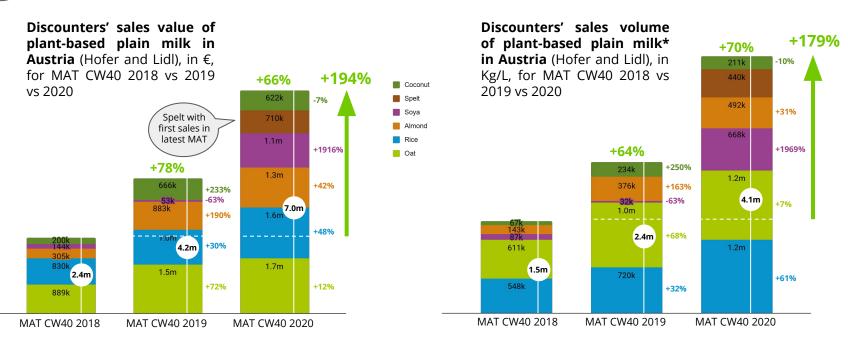


Plant-based sector deep dive: Austria Discounters' plant-based plain-milk sales





Oat, rice, and almond dominate the discount sector, with soya experiencing huge gains in the latest period.





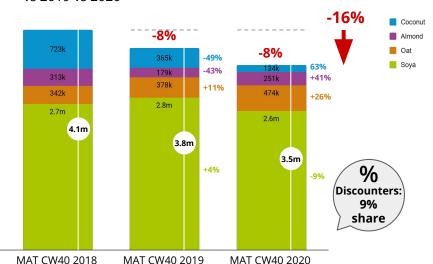
Plant-based sector deep dive: Austria Total plant-based flavoured-milk sales



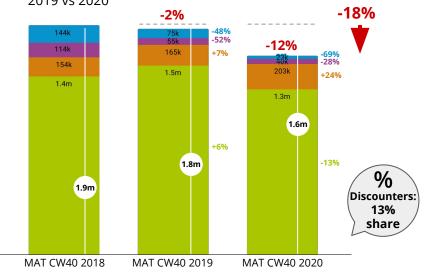


The plant-based flavoured-milk segment is dominated by soya.

Sales value of plant-based flavoured milk in Austria (total incl. discounters Hofer and Lidl), in €, for MAT CW40 2018 vs 2019 vs 2020



Sales volume of plant-based flavoured milk in Austria (total incl. discounters Hofer and Lidl), in Kg/L, for MAT CW40 2018 vs 2019 vs 2020





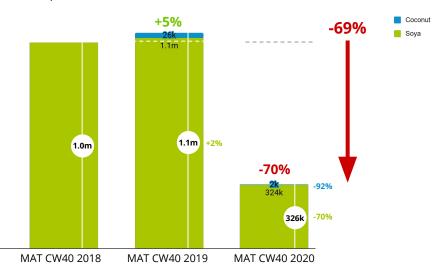
Plant-based sector deep dive: Austria Discounters' PB flavoured-milk sales



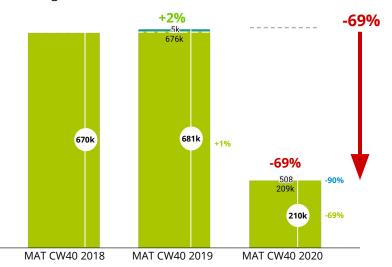


In discount stores, the plant-based flavoured-milk segment is also dominated by soya.

Discounters' sales value of plant-based flavoured milk in Austria (Hofer and Lidl), in €, for MAT CW40 2018 vs 2019 vs 2020



Discounters' sales volume of plant-based flavoured milk in Austria (Hofer and Lidl), in Kg/L, for MAT CW40 2018 vs 2019 vs 2020



Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Based

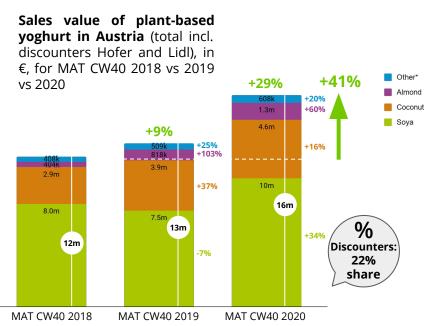


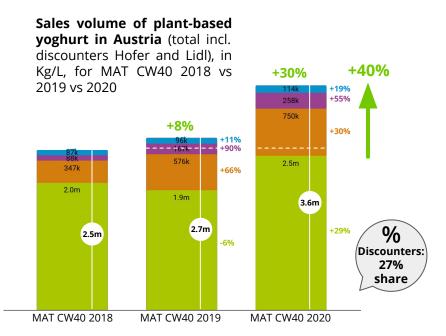
Plant-based sector deep dive: Austria Total plant-based-yoghurt sales





The plant-based-yoghurt segment is dominated by soya and coconut. All subsegments experienced growth in the latest period.





*Other includes ILupine, cashew, oat

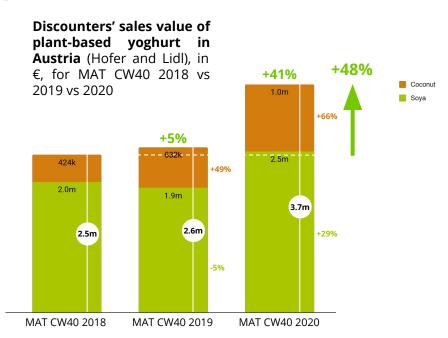


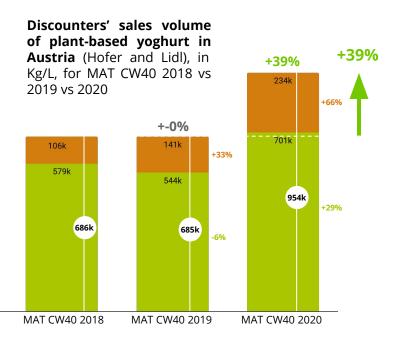
Plant-based sector deep dive: Austria Discounters' plant-based-yoghurt sales





A similar picture in discount, with soya still strong but coconut experiencing massive growth.







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Belgium





Agenda – Belgium



- 1. Key findings
- 2. Sector overview
- 3. Plant-based categories* deep dive
 - a. Plant-based meat
 - b. Plant-based plain milk**
 - c. Plant-based flavoured milk***
 - d. Plant-based yoghurt

*Plant-based food categories shown here are the plant-based food categories that were available at the time of purchase.

Plant-based plain milk was originally labelled "plain drink".*Plant-based flavoured drink was originally labelled "flavoured drink".



Key findings - Belgium





The **sales value of plant-based food*** grew 17% (€134m) over the past two periods, while sales volume increased by 8% (42m Kg/L). Discount stores recorded even stronger growth, with 35% (€8.9m) and 19% (4.1m Kg/L) respectively. Discounters have a 7% share in terms of sales value.



The plant-based food sector is **led by plant-based meat** (€48m), followed by **plant-based plain milk** (€39m). Plant-based meat showed the highest growth in sales value (19%).



In terms of plant-based meat (€48m), plant-based refrigerated meat accounts for 90% of sales value (€44m), with the remaining 10% coming from plant-based frozen meat (€4.8m). Sales value in both segments showed double-digit growth in the latest period.



The plant-based plain-milk (€39m) sector is dominated by soya milk (€14m), followed by almond (€11m) and oat (€5m). Oat milk had the strongest sales value growth (50%).



Plant-based yoghurt showed triple-digit growth (497%) in discount stores (€163k) over the last two periods. In general, the segment showed huge growth (€26m, 20%).

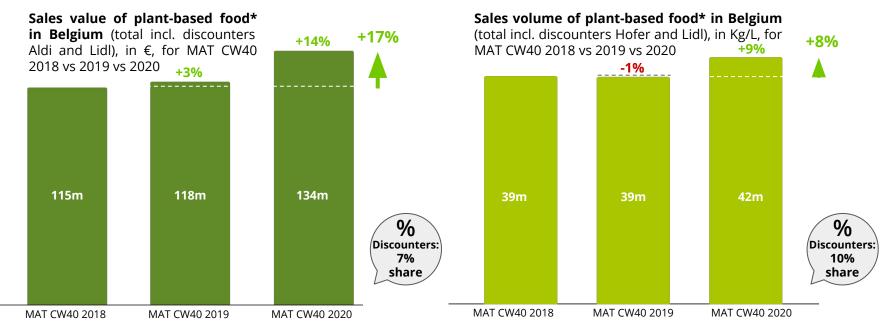


Plant-based sector overview: Belgium Total sales value and sales volume





Sales value grew 17% over the past two periods, while sales volume increased by 8%.



^{*}Plant-based meat (vegan and vegetarian), plant-based milk (plain and flavoured), plant-based yoghurt

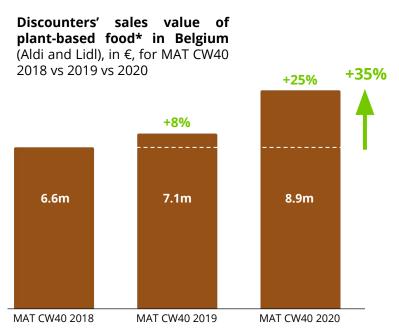


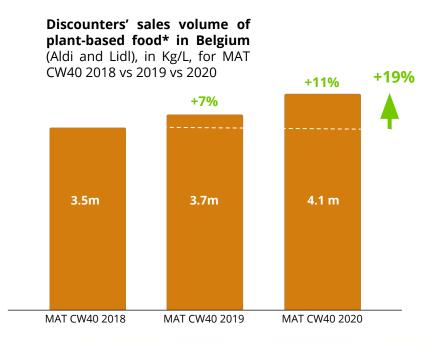
Plant-based sector overview: Belgium Discounters' sales value and sales volume





Discounters experienced even stronger growth over the past two periods.





^{*}Plant-based meat (vegan and vegetarian), plant-based milk (plain and flavoured), plant-based yoghurt



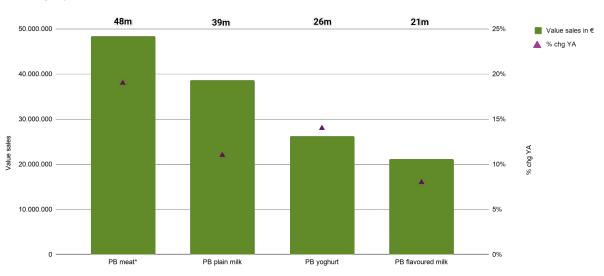
Plant-based sector overview: Belgium Total sales value by category





Plant-based meat had the highest-value sales, followed by plant-based plain milk.

Sales value of plant-based food in Belgium (total incl. discounters Aldi and Lidl) by category, in €, for MAT CW40 2020





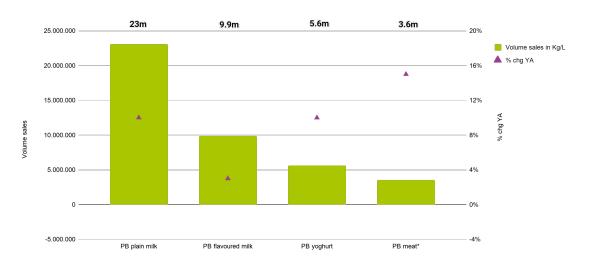
Plant-based sector overview: Belgium Total sales volume by category





Plant-based plain milk had the highest volume sales, followed by plant-based flavoured milk.

Sales volume of plant-based food in Belgium (total incl. discounters Aldi and Lidl) by category, in Kg/L, for MAT CW40 2020





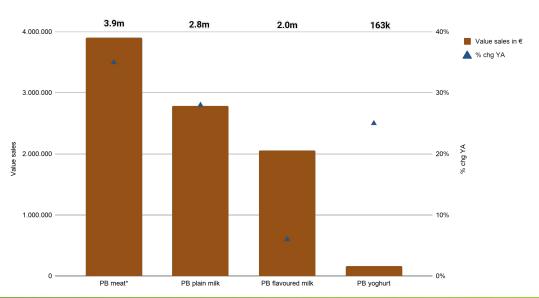
Plant-based sector overview: Belgium Discounters' sales value by category



%

Plant-based meat also had the highest sales value in discount stores, with all categories experiencing huge growth.

Discounters' sales value of plant-based food in Belgium (Aldi and Lidl) by category, in €, for MAT CW40 2020





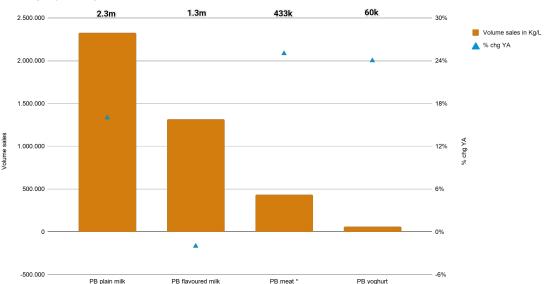
Plant-based sector overview: Belgium





Plant-based plain milk had the highest volume sales followed by plant-based flavoured milk.

> Discounters' sales volume of plant-based food in Belgium (Aldi and Lidl) by category, in Kg/L, for MAT CW40 2020





Plant-based sector deep dive: Belgium

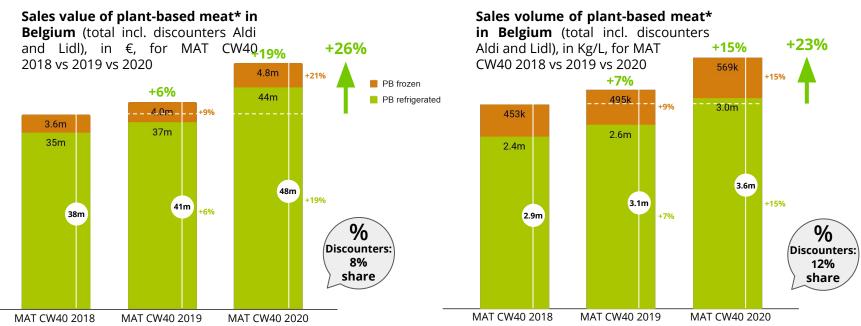


Plant-based sector deep dive: Belgium Total plant-based-meat sales





Plant-based refrigerated meat accounts for 90% of sales value, with the remaining 10% coming from plant-based frozen meat.



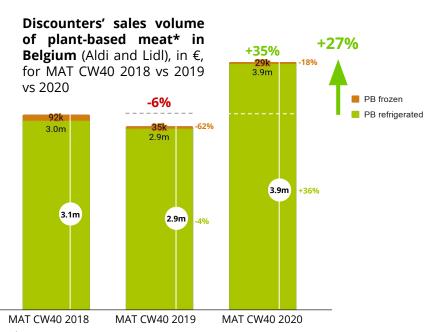


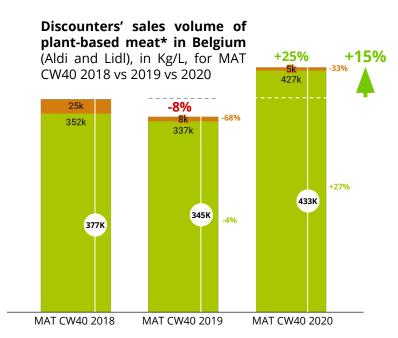
Plant-based sector deep dive: Belgium Discounters' plant-based-meat sales





In discount stores, the plant-based-meat sector is comprised mainly of refrigerated plant-based meat.





*Vegan and vegetarian

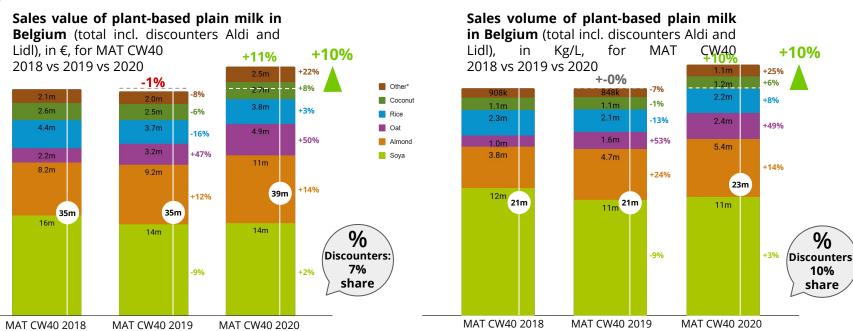


Plant-based sector deep dive: Belgium Total plant-based plain-milk sales





The plant-based plain milk segment is dominated by soya and almond, with oat showing the biggest increase.



*Other includes cashew, hazelnut, coconut/almond and other

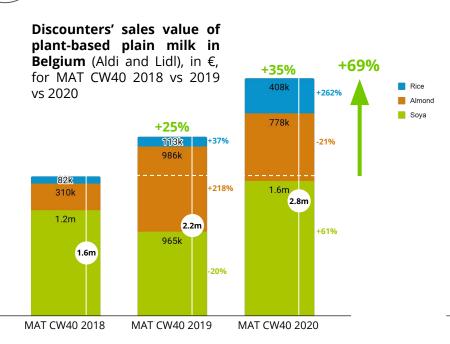


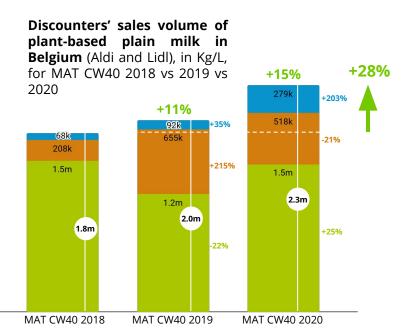
Plant-based sector deep dive: Belgium Discounters' plant-based plain-milk sales



%

Soya, and almond also dominate the discount sector, with rice accelerating fast.







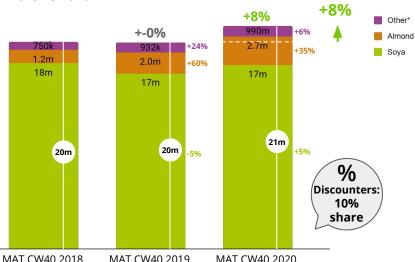
Plant-based sector deep dive: Belgium Total plant-based flavoured-milk sales



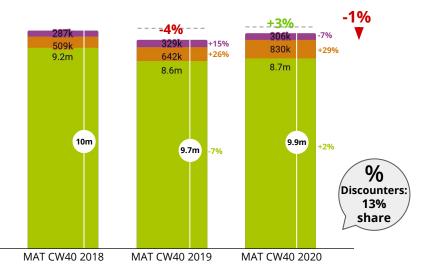


The plant-based flavoured-milk segment is dominated by soya, followed by almond.

Sales value of plant-based flavoured milk in Belgium (total incl. discounters Aldi and Lidl), in €, for MAT CW40 2018 vs 2019 vs 2020



Sales volume of plant-based flavoured milk in Belgium (total incl. discounters Aldi and Lidl), in Kg/L, for MAT CW40 2018 vs 2019 vs 2020



^{*}Other includes rice, hazelnut, oat, coconut, cashew, coconut/almond and other



Plant-based sector deep dive: Belgium Discounters' PB flavoured-milk sales

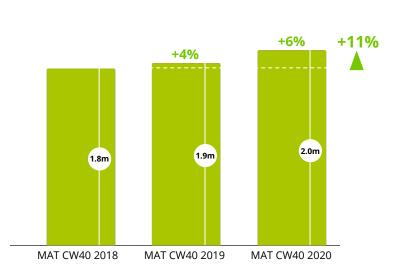




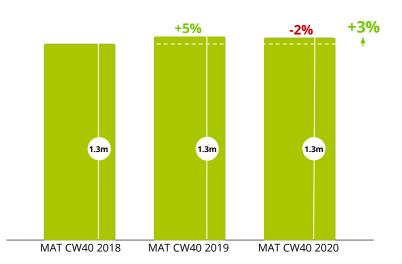
In discount stores, the only plant-based flavoured-milk on offer is soya milk.

Sova

Discounters' sales value of plant-based flavoured milk in Belgium (Aldi and Lidl), in €, for MAT CW40 2018 vs 2019 vs 2020



Discounters' sales volume of plant-based flavoured milk in Belgium (Aldi and Lidl), in Kg/L, for MAT CW40 2018 vs 2019 vs 2020



Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Based



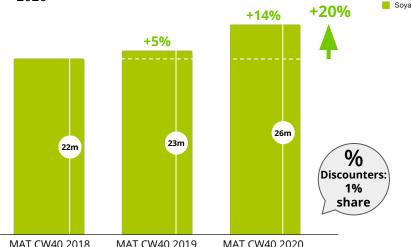
Plant-based sector deep dive: Belgium Total plant-based-yoghurt sales



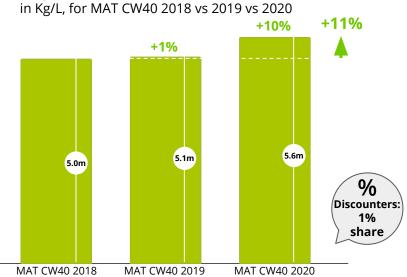


Plant-based yoghurt is showing consistent growth. Only soya variants are on offer.

Sales value of plant-based yoghurt in Belgium (total incl. discounters Aldi and Lidl), in €, for MAT CW40 2018 vs 2019 vs 2020



Sales volume of plant-based yoghurt in Belgium (total incl. discounters Aldi and Lidl), in Kg/l for MAT CW40 2018 vs 2019 vs 2020





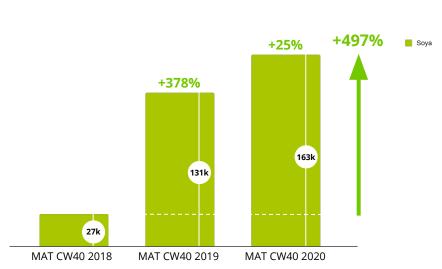
Plant-based sector deep dive: Belgium Discounters' plant-based-yoghurt sales



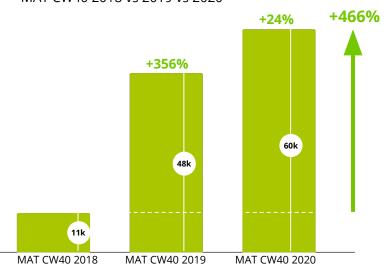


In discount stores, plant-based yoghurt is still in its early days but growing rapidly. Again, only soya is on offer.

Discounters' sales value of plant-based yoghurt in Belgium (Aldi and Lidl), in €, for MAT CW40 2018 vs 2019 vs 2020



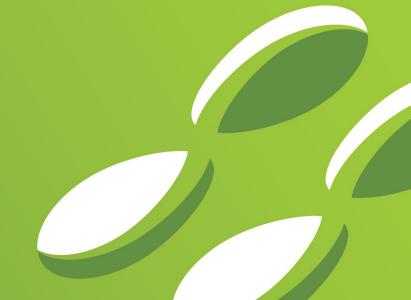
Discounters' sales volume of plant-based yoghurt in Belgium (Aldi and Lidl), in Kg/L, for MAT CW40 2018 vs 2019 vs 2020







Denmark —





- 1. Key findings
- 2. Sector overview
- 3. Plant-based categories* deep dive
 - a. Plant-based meat
 - b. Plant-based milk**
 - c. Plant-based cheese
 - d. Plant-based yoghurt
 - e. Plant-based ice cream

^{*}Plant-based food categories shown here are the plant-based food categories that were available at the time of purchase.

^{*}Plant-based milk was originally labelled "drink".



Key findings - Denmark





The sales value of plant-based food* grew 29% (€30m) over the past two periods, while sales volume increased by 46% (14m Kg/L). Discount stores recorded similar growth, at 31% (€14.5m) and 43% (7m Kg/L) respectively. Discounters had a high share in terms of sales value, at 48%.



The plant-based food sector is **led by plant-based milk** (€26m), followed by **plant-based yoghurt** (€4.7m). Plant-based meat and plant-based yoghurt showed the strongest growth in sales value (both at 16%).



The plant-based-meat sector (€29k) is dominated by plant-based refrigerated prepared dishes (e.g. nuggets, burger patties) (€13k) followed by plant-based frozen prepared dishes (e.g. nuggets, burger patties) (€12k). The segment grew 50% over the last two periods in terms of sales value, with a high discounter share, at 42%.



The plant-based milk market (€26m) is dominated by oat (€14m), followed by soya (€5.3) and almond (€4.5m). Oat has the strongest growth in terms of sales value (26%). Again, a high discounter share in terms of sales value, at 50%.



The plant-based cheese segment (€1410) is still in its early footsteps, with triple-digit growth in discounters over the past two periods.

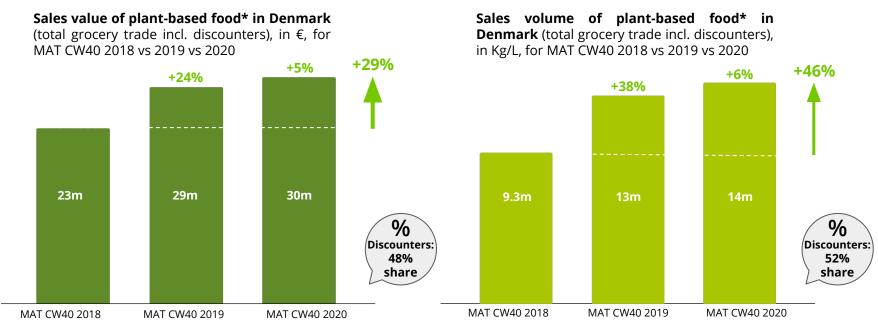


Plant-based sector overview: Denmark Total sales value and sales volume





Sales value grew 29% over the past two periods, while sales volume increased by 46%.



^{*}Plant-based meat (vegan and vegetarian), plant-based milk, plant-based cheese, plant-based yoghurt, plant-based ice cream



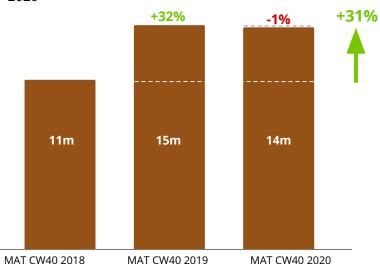
Plant-based sector overview: Denmark Discounters' sales value and sales volume



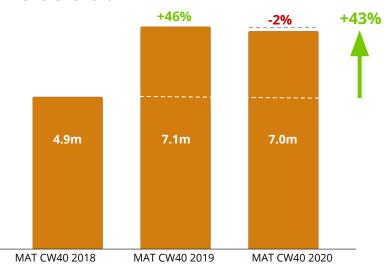


Discounters showed a strong increase in MAT CW40 2019, in terms of sales value and volume.

Discounters' sales value of plant-based food* in Denmark, in €, for MAT CW40 2018 vs 2019 vs 2020



Discounters' sales volume of plant-based food* in Denmark, in Kg/L, for MAT CW40 2018 vs 2019 vs 2020



^{*}Plant-based meat (vegan and vegetarian), plant-based milk (plain and flavoured), plant-based yoghurt



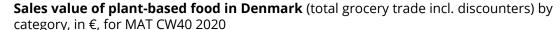
Plant-based sector overview: Denmark Total sales value by category

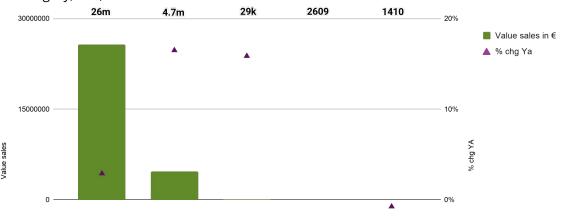




*Vegan and vegetarian

Plant-based milk had the highest-value sales, followed by plant-based yoghurt. PB yoghurt and PB meat had the strongest growth.





-15000000 PB milk PB voghurt PB meat* PB ice-cream PB cheese -10%



Plant-based sector overview: Denmark Total sales volume by category

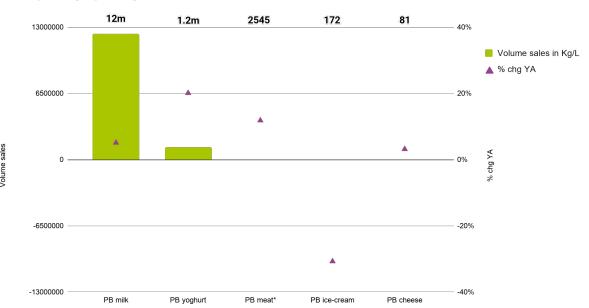




*Vegan and vegetarian

A similar picture is evident in terms of sales volume.

Sales volume of plant-based food in Denmark (total grocery trade incl. discounters) by category, in Kg/L, for MAT CW40 2020



Source: Nielsen MarketTrack



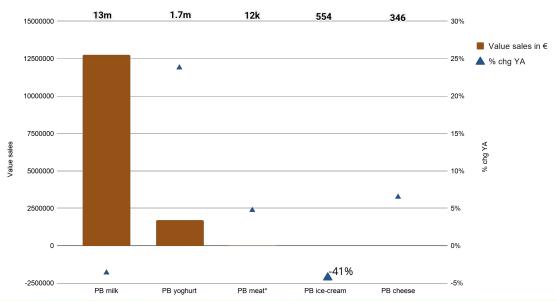
Plant-based sector overview: Denmark Discounters' sales value by category



%

Plant-based milk also had the highest value sales in discount stores, with plant-based yoghurt showing double-digit growth.

Discounters' sales value of plant-based food in Denmark by category, in €, for MAT CW40 2020





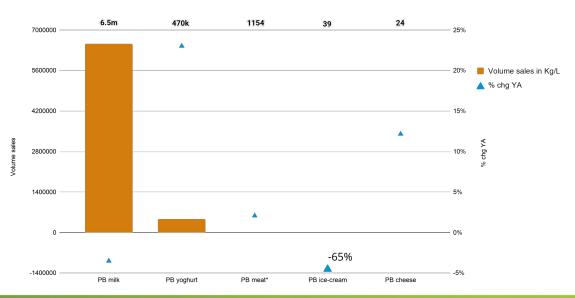
Plant-based sector overview: Denmark Discounters' sales volume by category





A similar picture emerges for sales volume.

Discounters' sales volume of plant-based food in Denmark by category, in Kg/L, for MAT CW40 2020





Plant-based sector deep dive: Denmark

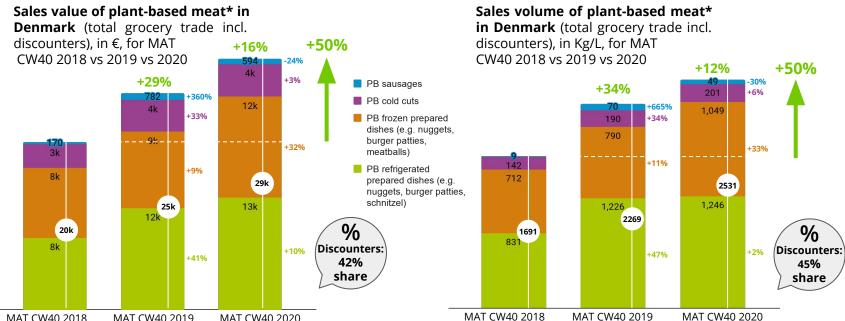


Plant-based sector deep dive: Denmark Total plant-based-meat sales





PB refrigerated and frozen prepared dishes had the highest sale value, with more than 40% of PB meat sold in discount stores.

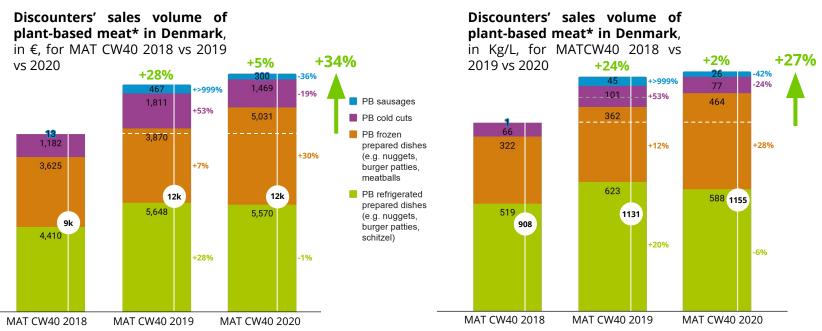




Plant-based sector deep dive: Denmark Discounters' plant-based-meat sales



In discount stores, plant-based refrigerated and frozen prepared dishes again dominate the plant-based-meat segment.



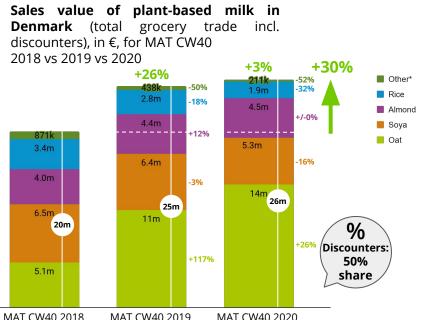


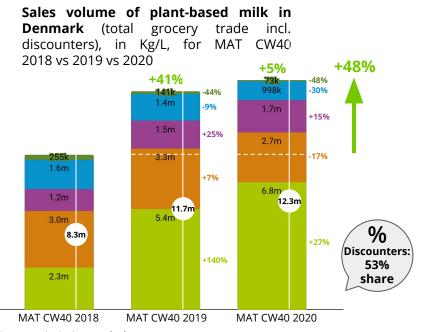
Plant-based sector deep dive: Denmark Total plant-based milk sales





Oat milk has the highest sales value and volume, followed by soya and almond.





*Other includes coconut/rice, cashew, rice/hazelnut, coconut/almond, rice/hazelnut, rice/almond, quinoa, hazelnut, rice/coconut, rice/quinoa, and other



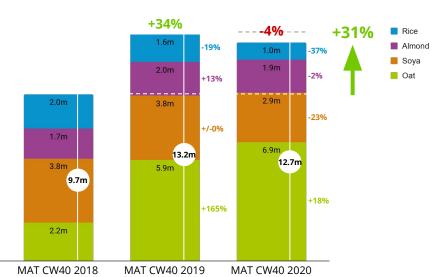
Plant-based sector deep dive: Denmark Discounters' plant-based milk sales



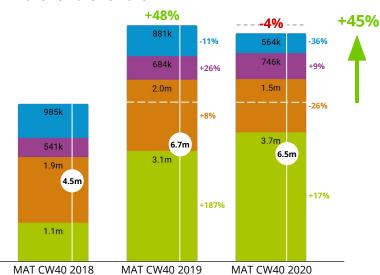
%

A similar picture is evident in discount stores, with oat showing huge growth, followed by soya and almond.

Discounters' sales value of plant-based milk in Denmark, in €, for MAT CW40 2018 vs 2019 vs 2020



Discounters' sales volume of plant-based milk in Denmark, in Kg/L, for MAT CW40 2018 vs 2019 vs 2020



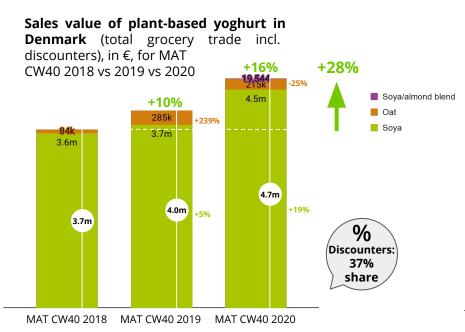


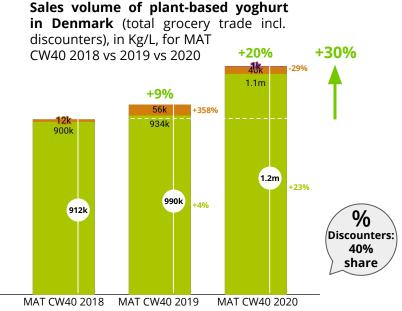
Plant-based sector deep dive: Denmark Total plant-based-yoghurt sales





Soya accounts for more than 90% of sales in the plant-based-yoghurt segment.





Source: Nielsen MarketTrack

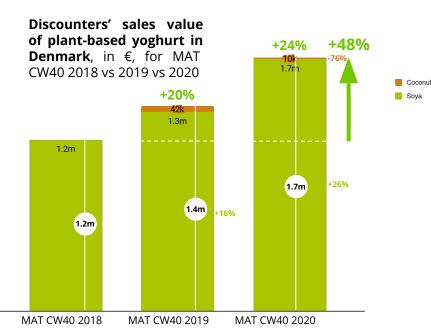


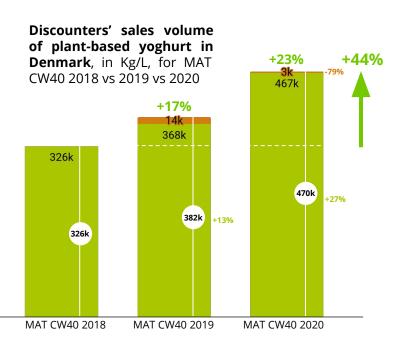
Plant-based sector deep dive: Denmark Discounters' plant-based-yoghurt sales





A similar picture is evident in discount stores, but with even stronger growth over the past two periods.







Plant-based sector deep dive: Denmark Total plant-based-cheese sales

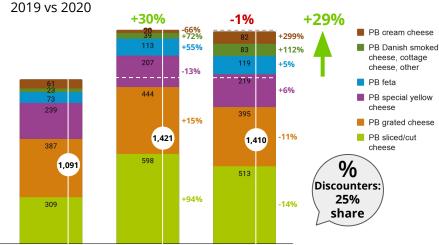


MAT CW40 2018

The plant-based cheese sector is dominated by sliced and grated variants.

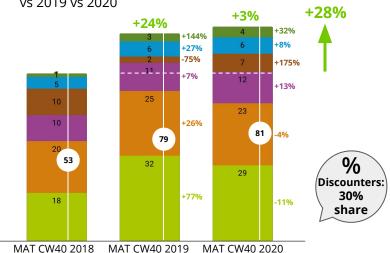
Sales value of plant-based cheese in Denmark (total grocery trade incl. discounters), in €, for MAT CW40 2018 vs

MAT CW40 2019



MAT CW40 2020

Sales volume of plant-based cheese in Denmark (total grocery trade incl. discounters), in Kg/L, for MAT CW40 2018 vs 2019 vs 2020

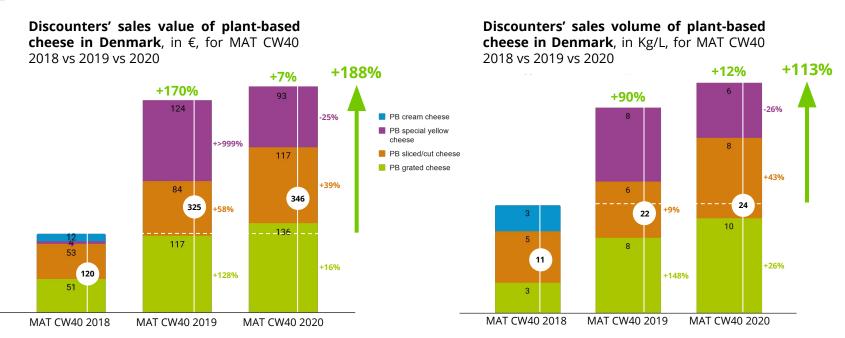




Plant-based sector deep dive: Denmark Discounters' plant-based-cheese sales



Plant-based grated and sliced cheese also dominate the discount sector.





Plant-based sector deep dive: Denmark Total plant-based ice-cream sales



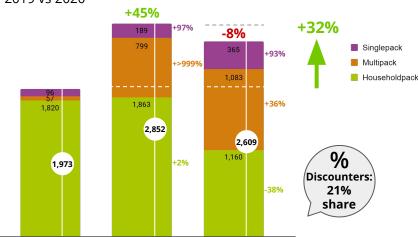


Plant-based ice cream is dominated by household and multipacks, with the latter showing huge growth.

Sales value of plant-based ice cream in Denmark (total grocery trade incl. discounters), in €, for MAT CW40 2018 vs 2019 vs 2020

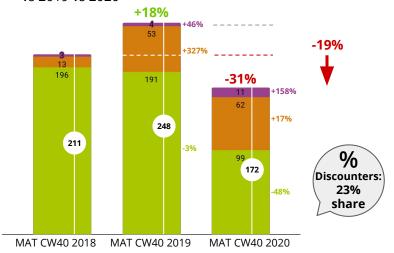
MAT CW40 2019

MAT CW40 2018



MAT CW40 2020

Sales volume of plant-based ice cream in Denmark (total grocery trade incl. discounters), in Kg/L, for MAT CW40 2018 vs 2019 vs 2020





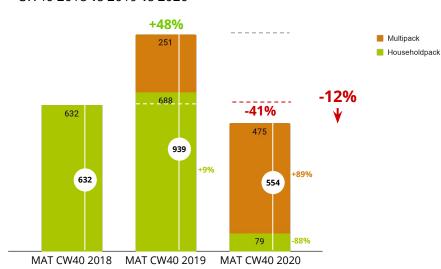
Plant-based sector deep dive: Denmark Discounters' plant-based ice-cream sales



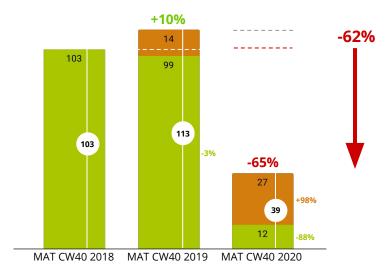
%

In discounters, multipacks showed even stronger growth.

Discounters' sales value of plant-based ice cream in Denmark, in €, for MAT CW40 2018 vs 2019 vs 2020



Discounters' sales volume of plant-based ice cream in Denmark, in Kg/L, for MAT CW40 2018 vs 2019 vs 2020





France





Agenda - France



- 1. Key findings
- 2. Sector overview
- 3. Plant-based categories* deep dive
 - a. Plant-based meat
 - b. Plant-based milk**
 - c. Plant-based yoghurt

^{*}Plant-based food categories shown here are the plant-based food categories that were available at the time of purchase. ** Plant-based milk was originally labelled "drink".



Key findings - France





The sales value of plant-based food* grew 21% (€355m) over the past two periods, while sales volume increased by 18% (125m Kg/L). Discount stores recorded even stronger growth, at 90% (€21m) and 112% (12m Kg/L) respectively. Discounters have a 6% share in terms of sales value.



The plant-based food sector is **led by plant-based milk** (€187m), followed by plant-based yoghurt (€87m) and plant-based meat (€80m). All categories showed strong growth.



In terms of plant-based meat (€80m), plant-based refrigerated meat (€68m) is the most dominant segment, followed by plant-based ambient (€7m) and plant-based frozen (€5m) meat. Plant-based frozen meat showed the strongest growth over the past two periods.



In terms of plant-based milk (€187m), almond (€72m) is the most dominant segment followed by soya (€41m) and oat (€21m). There is great subsegment variety (e.g. rice, hazelnut, coconut, >20 others).



In the plant-based yoghurt segment (€87m), plant-based flavoured yoghurt (€55m) is the most dominant subsegment, followed by plant-based plain (€17m) and bifidus (€11m) yoghurt.

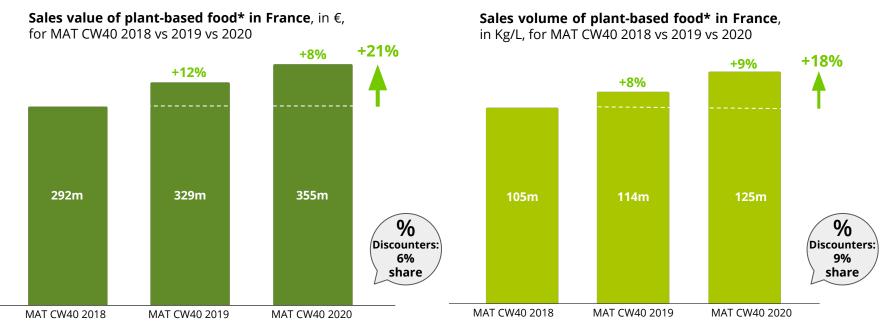


Plant-based sector overview: France Total sales value and sales volume





Sales value grew 21% over the past two periods, while sales volume increased by 18%.



^{*}Plant-based meat (vegan and vegetarian), plant-based milk, and plant-based yoghurt. Includes hypermarkets, supermarkets, Proximite, eDrive, discounters



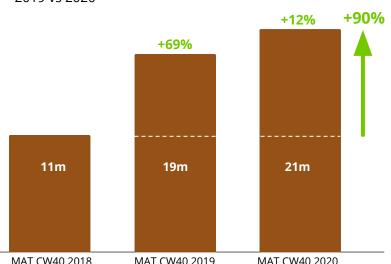
Plant-based sector overview: France Discounters' sales value and sales volume

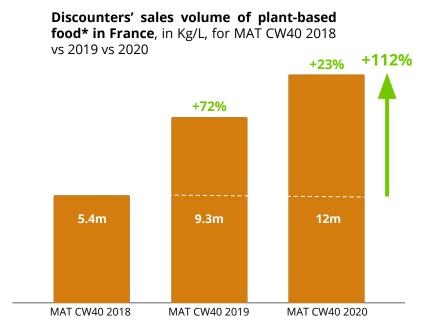




Discounters experienced even stronger growth over the past two periods.

Discounters' sales value of plant-based food* in France, in €, for MAT CW40 2018 vs 2019 vs 2020





^{*}Plant-based meat (vegan and vegetarian), plant-based milk, and plant-based yoghurt.



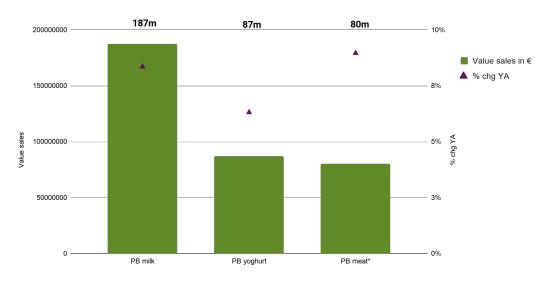
Plant-based sector overview: France Total sales value by category





Plant-based milk had the highest-value sales, followed by plant-based yoghurt. All categories showed growth.

Sales value of plant-based food in France** by category, in €, for MAT CW40 2020





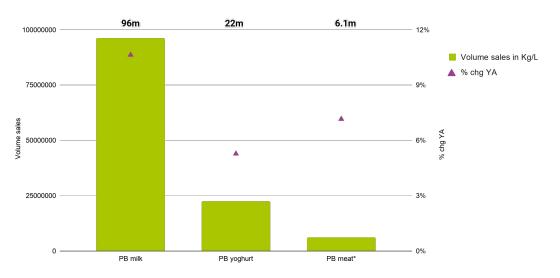
Plant-based sector overview: France Total sales volume by category





In terms of sales volume, growth is evident for all categories.

Sales volume of plant-based food in France** by category, in Kg/L, for MAT CW40 2020



*Vegan and vegetarian. **Total includes hypermarkets, supermarkets, Proximite, eDrive, & discounters



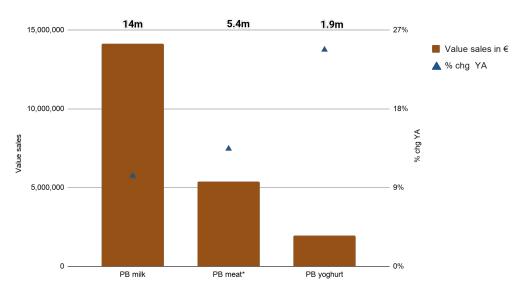
Plant-based sector overview: France Discounters' sales value by category





Plant-based milk also had the highest sales value in discount stores, followed by PB meat, with all categories showing growth.

Discounters' sales value of plant-based food in France by category, in €, for MAT CW40 2020





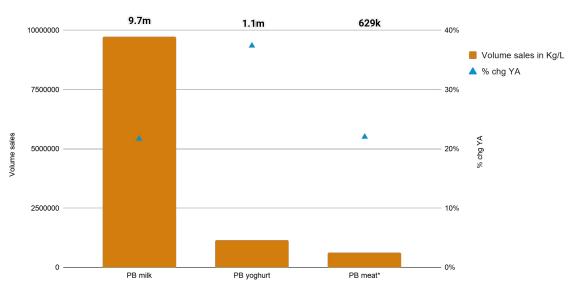
Plant-based sector overview: France Discounters' sales volume by category





A similar picture emerges in terms of sales volumes – growth is evident for all categories.

Discounters' sales volume of plant-based food in France by category, in Kg/L, for MAT CW40 2020





Plant-based sector deep dive: France



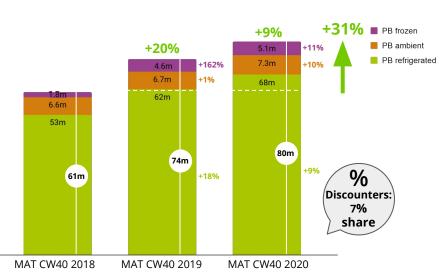
Plant-based sector deep dive: France Total plant-based-meat sales



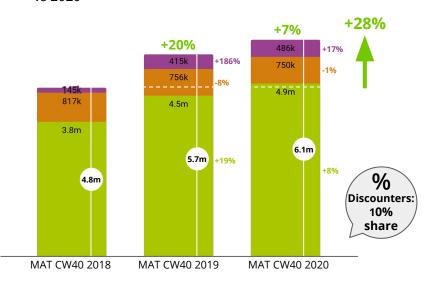


Plant-based refrigerated meat accounts for the bulk of sales value and volume.

Sales value of plant-based meat* in France, in €, for MAT CW40 2018 vs 2019 vs 2020



Sales volume of plant-based meat* in France, in Kg/L, for MAT CW40 2018 vs 2019 vs 2020



Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Based

^{*}Vegan and vegetarian. Total includes hypermarkets, supermarkets, Proximite, eDrive, & discounters

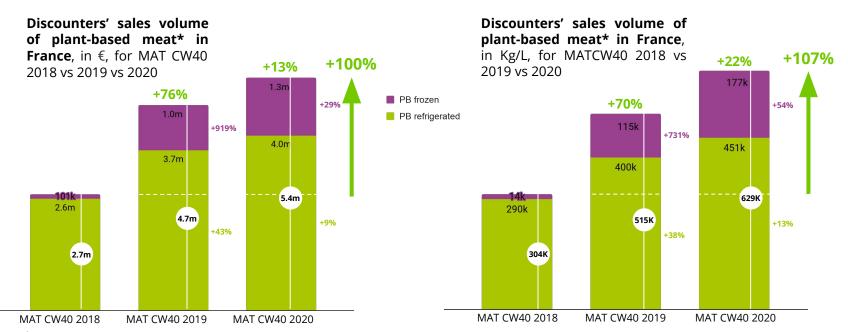


Plant-based sector deep dive: France Discounters' plant-based-meat sales



%

In discount stores, the plant-based-meat sector is also comprised mainly of refrigerated plant-based meat.



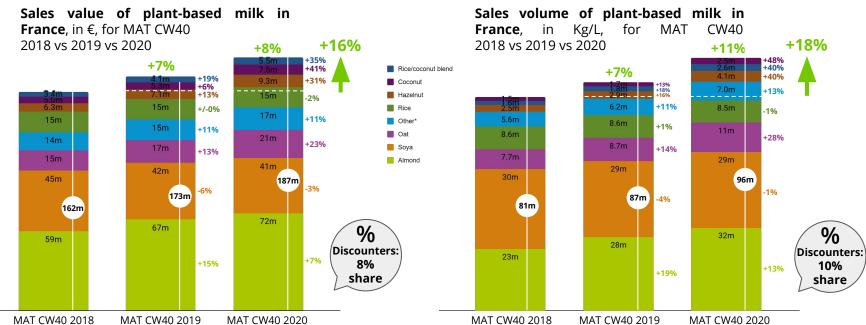


Plant-based sector deep dive: France Total plant-based milk sales





Almond milk has the highest sales value and volume, followed by soya and oat.



*Other includes more than 20 subsegments, with the most dominant being rice/coconut and spelt/hazelnut. Total includes hypermarkets, supermarkets, Proximite, eDrive,& discounters

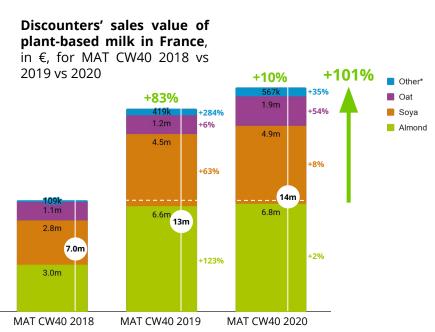


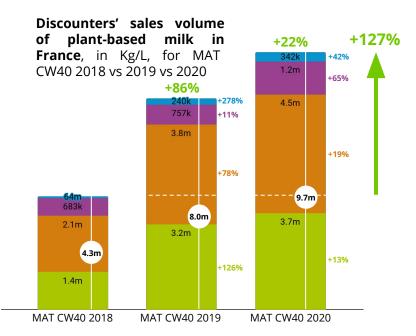
Plant-based sector deep dive: France Discounters' plant-based-milk sales





Soya, and almond also dominate the discount sector, with oat accelerating fast.





^{*}Other includes more than 15 subsegments, with rice dominating.

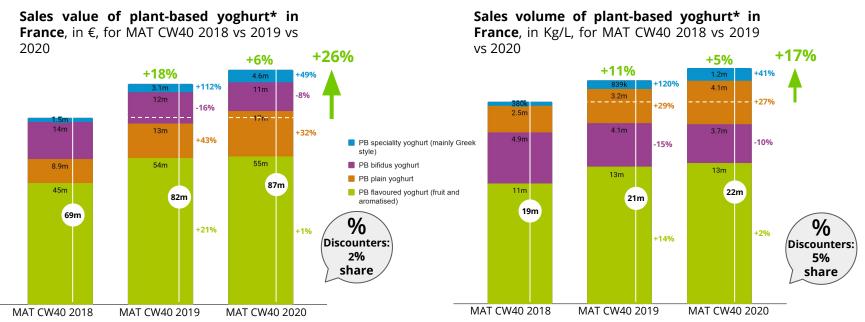


Plant-based sector deep dive: France Total plant-based-yoghurt sales





Plant-based flavoured yoghurt has the highest sales value, followed by plant-based plain yoghurt.



*Mainly with a soya base. Total includes hypermarkets, supermarkets, Proximite, eDrive,& discounters

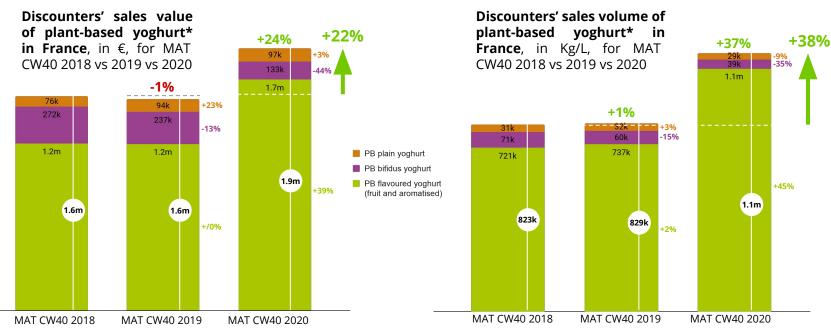


Plant-based sector deep dive: France Discounters' plant-based-yoghurt sales





In discount stores, plant-based flavoured yoghurt is even more dominant.



^{*}Mainly with a soya base. Total includes hypermarkets, supermarkets, Proximite, eDrive,& discounters

Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Based





Germany





Agenda – Germany

- 1. Key findings
- 2. Sector overview
- 3. Plant-based categories* deep dive
 - a. Plant-based meat
 - b. Plant-based fish
 - c. Plant-based milk incl. Plant-based flavoured milk**
 - d. Plant-based cheese
 - e. Plant-based plain yoghurt
 - f. Plant-based flavoured yoghurt***
 - g. Plant-based ice cream

^{*}Plant-based food categories shown here are the plant-based food categories that were available at the time of purchase.

^{**}Plant-based flavoured milk was originally labelled "mixed milk drinks". ***Plant-based flavoured yoghurt was originally labelled "fruit yoghurt".



Key findings - Germany





The sales value of plant-based food* grew by 97% (€817m) over the past two periods, while sales volume increased by 80% (310m Kg/L). Discount stores showed even stronger growth, at 114% (€202m) and 92% (101m Kg/L) respectively. Discounters had a 25% share in terms of sales value.



The plant-based food sector is **led by plant-based milk** (€396m), followed by **plant-based meat** (€181m). All categories showed double-digit sales growth in sales value in the latest period, with plant-based meat and fish showing triple-digit growth.



In terms of plant-based meat, plant-based refrigerated meat (e.g. burger patties, nuggets, minced) (€123m) is the most developed segment, followed by plant-based cold cuts and meat spreads (€29m). Sales shot up in the latest period, with a triple-digit growth in sales value, especially in discount stores.



In terms of plant-based milk (€396m), oat milk (€184m) had the highest sales value, followed by almond (€82m) and soya (€74m). Oat milk is on fire, especially in the latest period (105%).



The plant-based fish and plant-based cheese segments are both still in their early stages of development, with triple-digit growth in sales value. Plant-based fish products arrived on discounters' shelves in the last period, for the first time.

^{*}Plant-based meat (only vegan), plant-based fish, plant-based milk, plant-based cheese, plant-based yoghurt, plant-based ice cream; all numbers refer to MAT CW39 2020 if not stated otherwise.

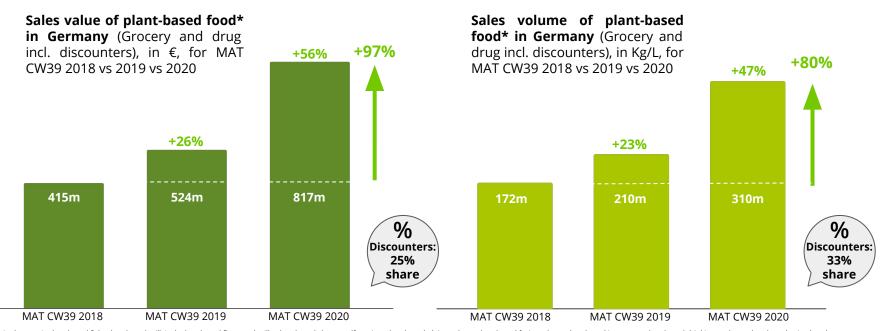


Plant-based sector overview: Germany Total sales value and sales volume





Sales value grew 97% over the past two periods, while sales volume increased by 80%.



*Plant-based meat (only vegan), plant-based fish, plant-based milk incl. plant-based fiavoured milk, plant-based cheese self service, plant-based plain yoghurt, plant-based fruit yoghurt, plant-based is ceream, plant-based drinking yoghurt, plant-based spiced yoghurt

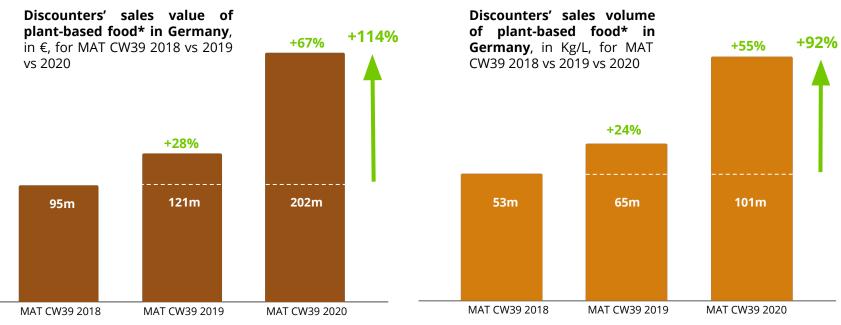


Plant-based sector overview: Germany Discounters' sales value and sales volume





Discounters experienced even stronger growth over the past two periods.



^{*}Plant-based meat (only vegan), plant-based fish, plant-based milk incl. mixed milk drinks, plant-based cheese self service, plant-based plain yoghurt, plant-based fruit yoghurt, plant-based ice cream



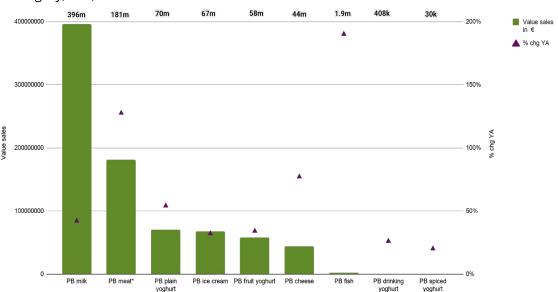
Plant-based sector overview: Germany Total sales value by category





Plant-based milk had the highest sales value, followed by plant-based meat. All categories experienced huge growth.

Sales value of plant-based food in Germany (grocery and drug incl. discounters) by category, in €, for MAT CW39 2020





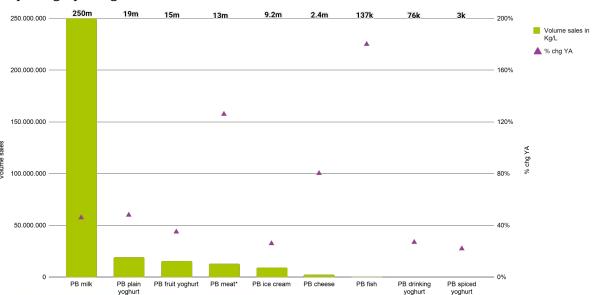
Plant-based sector overview: Germany Total sales volume by category





Plant-based milk also had the highest sales volume but this time followed by plant-based yoghurt.

Sales volume of plant-based food in Germany (grocery and drug incl. discounters) by category, in Kg/L, for MAT CW39 2020



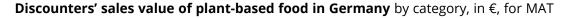
*Only vegan

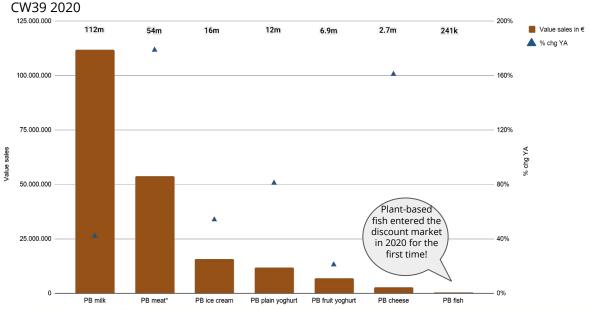


Plant-based sector overview: Germany Discounters' sales value by category



Plant-based milk also had the highest sales value in discount stores, with all categories experiencing huge growth.





*Only vegan

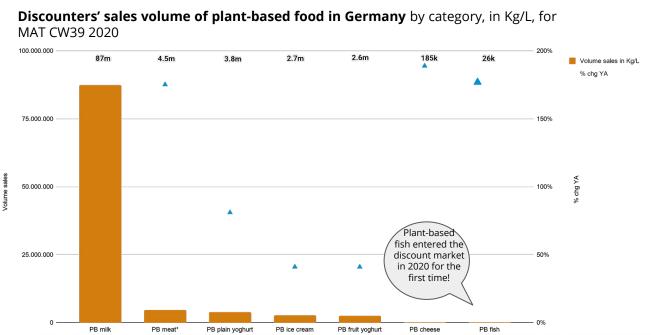


Plant-based sector overview: Germany Discounters' sales volume by category



*Only vegan

There is a similar picture in terms of discounters' volume sales, with tremendous growth for all categories.



Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Base



Plant-based sector deep dive: Germany

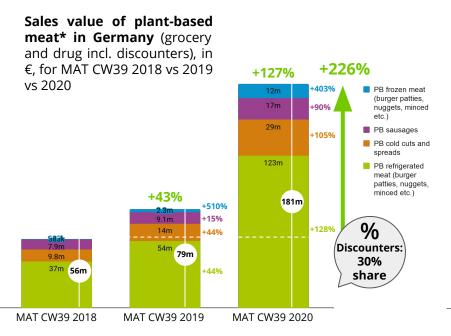


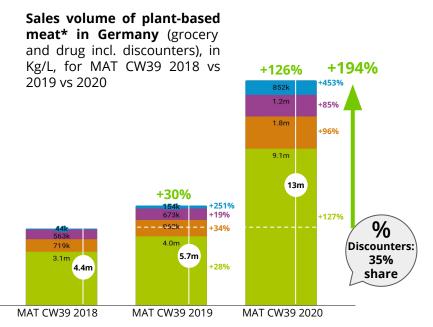
Plant-based sector deep dive: Germany Total plant-based-meat sales





Plant-based refrigerated meat showed the highest sales value and volume. 30% of plant-based meat is sold in discount stores.



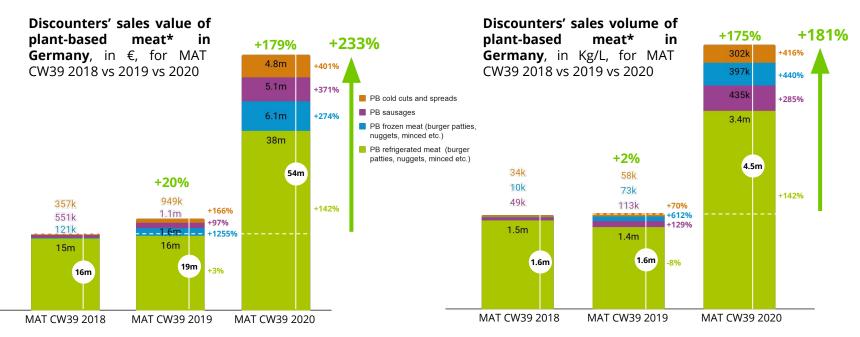




Plant-based sector deep dive: Germany Discounters' plant-based-meat sales



In discount stores, the plant-based meat market is also dominated by refrigerated meat alternatives.



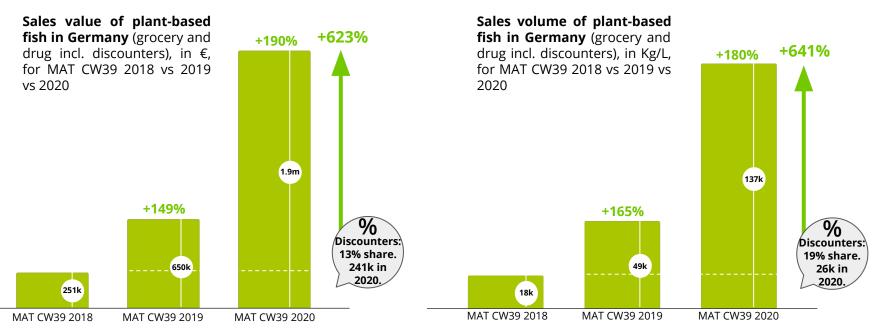


Plant-based sector deep dive: Germany Total plant-based-fish sales





Plant-based fish showed huge growth as well as its first sales in discounters in the last period.



Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Based

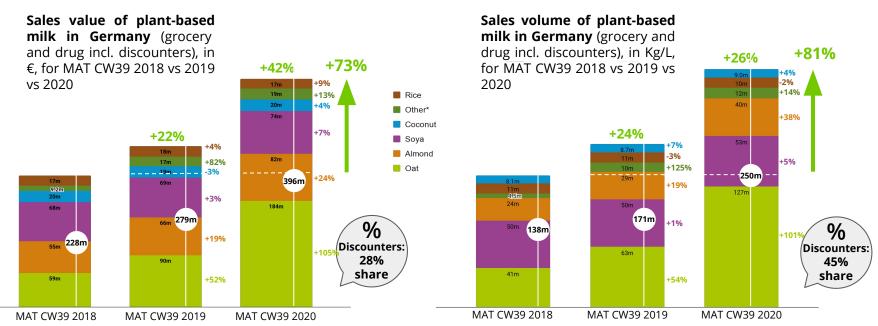


Plant-based sector deep dive: Germany Total plant-based-milk sales





Oat milk showed the highest sales value and volume, followed by almond and soya.



^{*}Other includes macadamia, millet, hemp lupine, spelt, cashew, and others

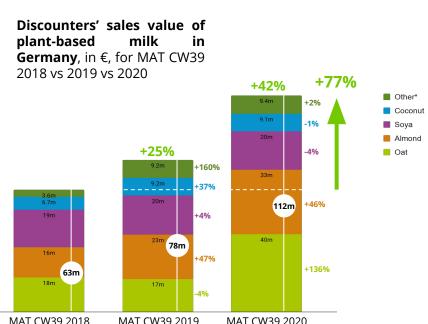


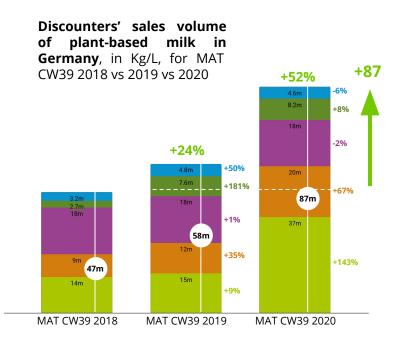
Plant-based sector deep dive: Germany Discounters' plant-based milk sales





Oat milk had the highest sales value and volume, followed by almond and soya.





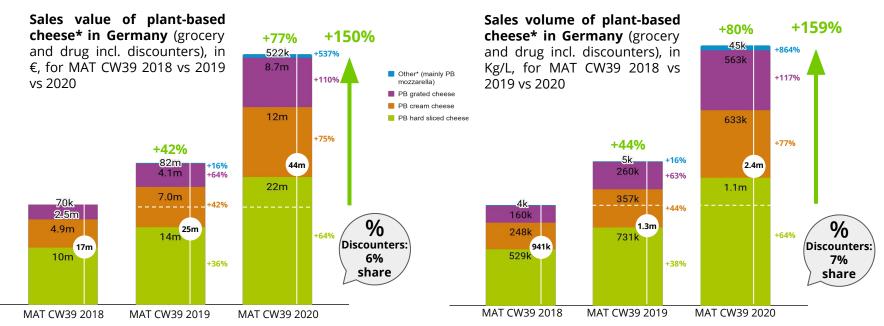
*Other includes rice, cashew, spelt, and others



Plant-based sector deep dive: Germany Total plant-based cheese sales



Plant-based hard sliced cheese showed the highest value/volume sales, followed by plant-based cream cheese.



*Other includes plant-based semi-hard sliced cheese, and plant-based mozzarella; all self service

Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Base



Plant-based sector deep dive: Germany Discounters' plant-based cheese sales



Plant-based mozzarella is more significant for discounters than for the overall market.



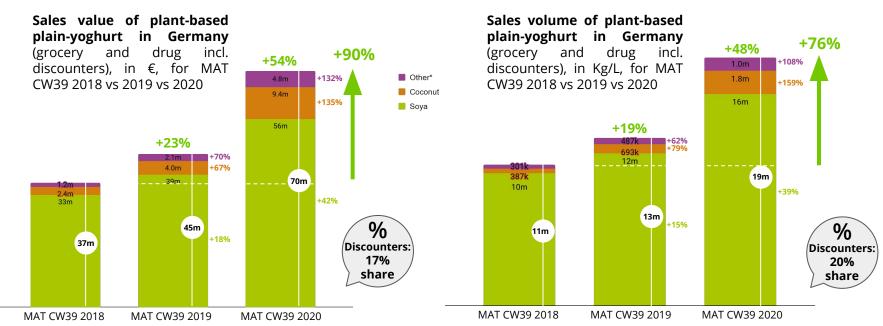


Plant-based sector deep dive: Germany Total plant-based plain-yoghurt sales





The plant-based plain-yoghurt sector is dominated by soya, with coconut and others also showing huge sales increases.



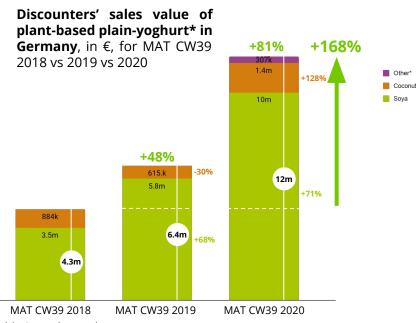
*Other includes lupine, almond, and cashew

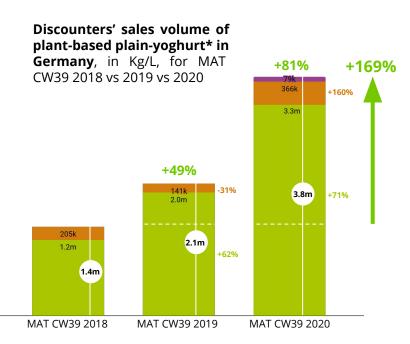






A similar picture is evident in discounters, but here the growth over the past two years is even stronger.





*Includes almond, lupine, cashew, and oat

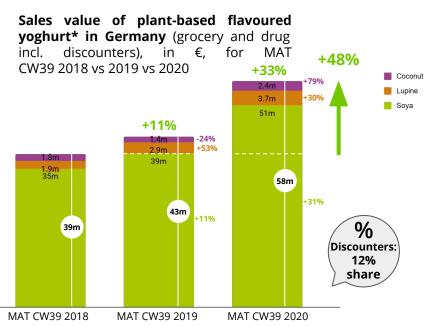


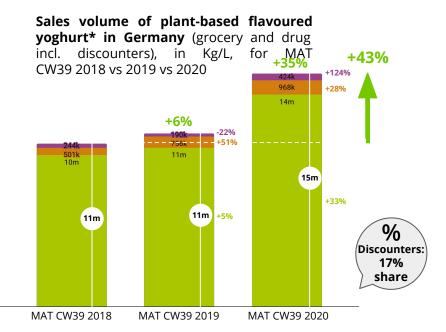
Plant-based sector deep dive: Germany Total plant-based flavoured-yoghurt sales





The plant-based flavoured yoghurt market is dominated by soya, with coconut showing rapid growth.





*Flavoured yoghurt with a base of soya, coconut, or lupine



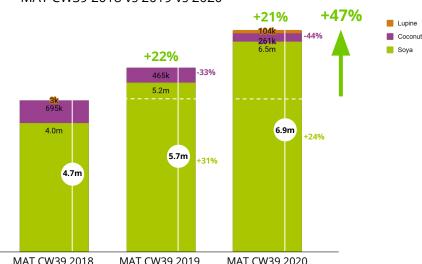
Plant-based sector deep dive: Germany Discounters' PB flavoured-yoghurt sales



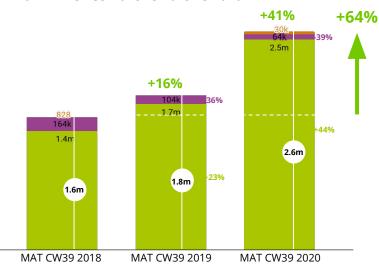
%

In discount stores, the plant-based fruit yoghurt market is similarly dominated by soya.

Discounters' sales value of plant-based flavoured-yoghurt* in Germany, in €, for MAT CW39 2018 vs 2019 vs 2020



Discounters' sales volume of plant-based flavoured-yoghurt* in Germany, in Kg/L, for MAT CW39 2018 vs 2019 vs 2020



^{*}Flavoured yoghurt with a base of soya, coconut, or lupine

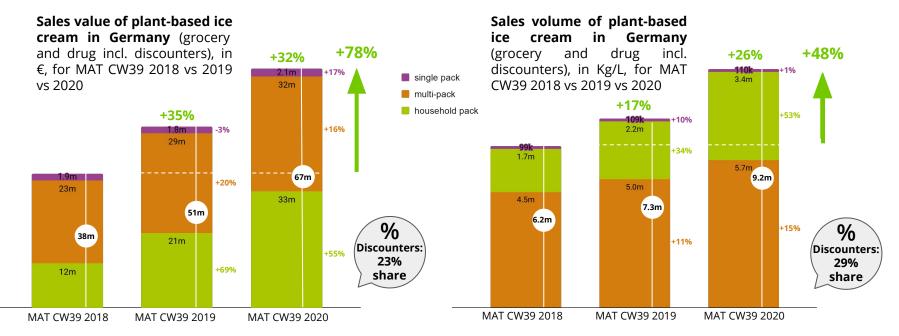


Plant-based sector deep dive: Germany Total plant-based ice cream sales





Plant-based ice cream is dominated by multi- and household packs, with the latter showing huge growth.



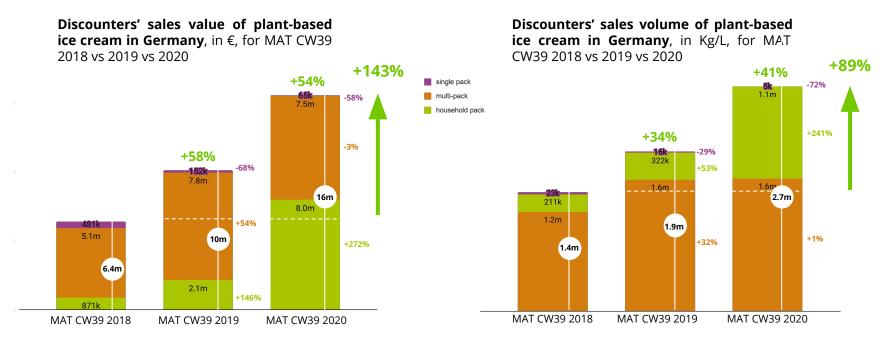


Plant-based sector deep dive: Germany Discounters' plant-based ice cream sales



%

In discount stores, household packs showed even stronger growth.







Italy





- 1. Key findings
- 2. Sector overview
- 3. Plant-based categories* deep dive
 - a. Plant-based meat
 - b. Plant-based milk**
 - c. Plant-based yoghurt
 - d. Plant-based cheese
 - e. Plant-based ice cream

^{*}Plant-based food categories shown here are the plant-based food categories that were available at the time of purchase.

^{**}Plant-based milk was originally labelled 'PB drinks'.



Key findings - Italy





The sales value of plant-based food* declined 1% (€425m) over the past two periods, while sales volume increased by 3% (140m Kg/L). Discount stores recorded similar growth rates, at 2% (€73m) and 0% (35m Kg/L) respectively. Discounters had a 16% share in terms of sales value.



The plant-based food sector is **led by plant-based milk** (€231m), followed by **plant-based meat** (€111m) and **plant-based yoghurt** (€43m). Plant-based milk (7%) also had the strongest growth in sales value, followed by plant-based ice cream (5%) and plant-based meat (1%).



The plant-based-meat (€111m) sector is dominated by plant-based meals (e.g. burger patties, nuggets, sausages) (€98m), with remaining sales coming from tofu (€8.0m) and plant-based cold cuts (€5.4m).



The plant-based-milk (€231m) sector is dominated by soya (€87m), followed by rice (€46m) and almond (€44m). Oat had the strongest growth in sales value in both periods (23%).



The plant-based ice-cream (€33m) sector is dominated by multipacks (€22m), followed by household packs (€11m). The sector showed double-digit growth in sales value over the past two periods.

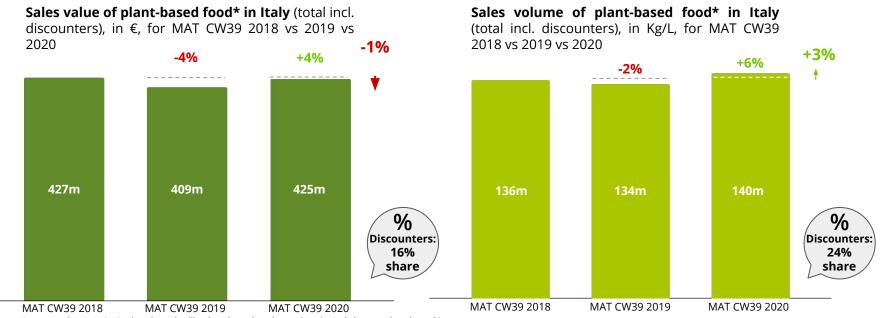


Plant-based sector overview: Italy Total sales value and sales volume





Sales value declined 1% over the past two periods, while sales volume increased by 3%.



^{*}Plant-based meat (vegan and vegetarian), plant-based milk, plant-based yoghurt, plant-based cheese, plant-based ice cream



Plant-based sector overview: Italy Discounters' sales value and sales volume

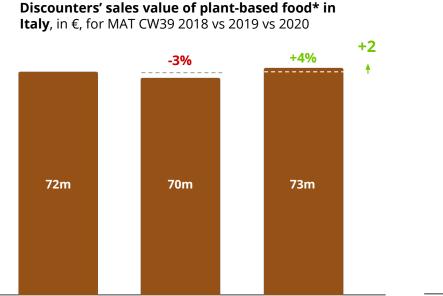


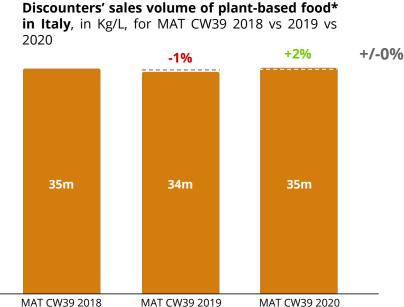


MAT CW39 2018

A similar picture is evident in discount stores.

MAT CW39 2020





^{*}Plant-based meat (vegan and vegetarian), plant-based milk, plant-based yoghurt, plant-based cheese, plant-based ice cream

MAT CW39 2019

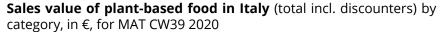


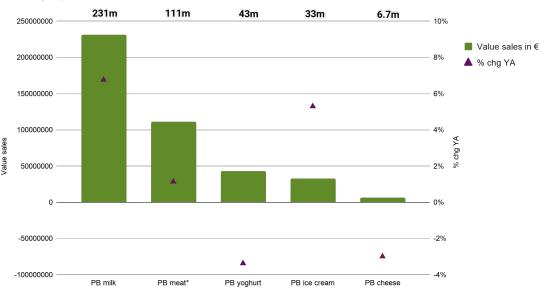
Plant-based sector overview: Italy Total sales value by category





In terms of sales value, plant-based milk leads the plant-based sector, followed by plant-based meat.





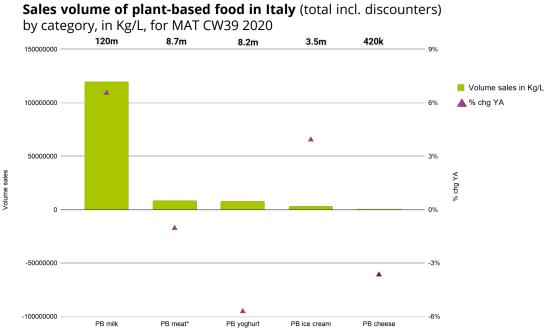


Plant-based sector overview: Italy Total sales volume by category





Plant-based milk also showed the highest sales volume, again followed by plant-based meat.

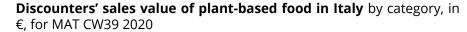


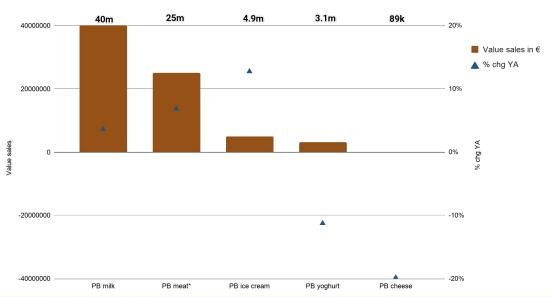


Plant-based sector overview: Italy Discounters' sales value by category



Plant-based milk also showed the highest sales value in discount stores.





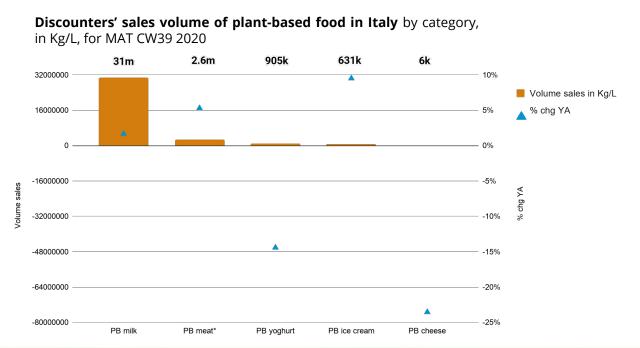


Plant-based sector overview: Italy Discounters' sales volume by category



%

A similar picture emerges in terms of sales volume.





Plant-based sector deep dive: Italy

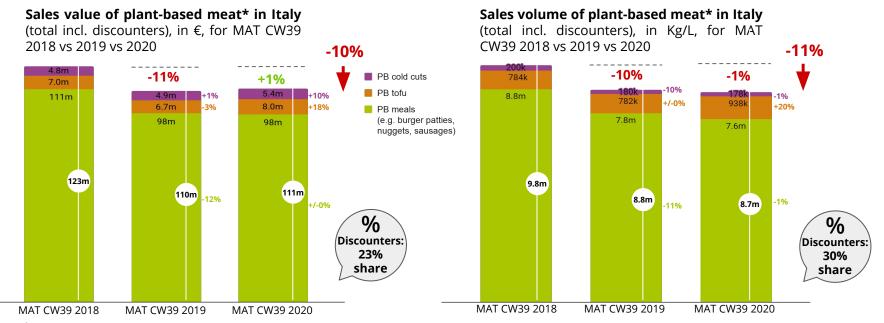


Plant-based sector deep dive: Italy Total plant-based-meat sales





Plant-based meals (e.g. burger, nuggets, sausages) had the highest sales value and volume.



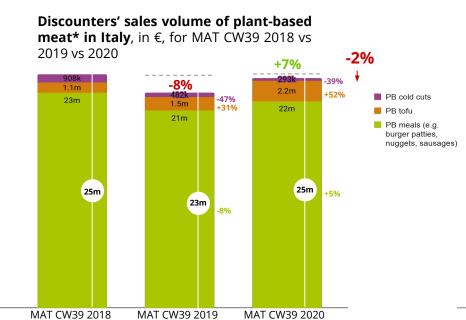


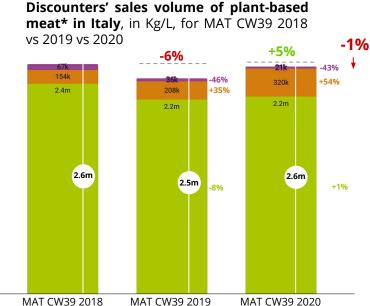
Plant-based sector deep dive: Italy Discounters' plant-based-meat sales



%

In discount stores, the plant-based-meat sector is also dominated by plant-based meals (e.g. burger, nuggets, sausages).





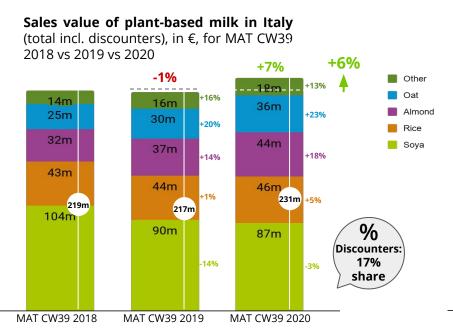


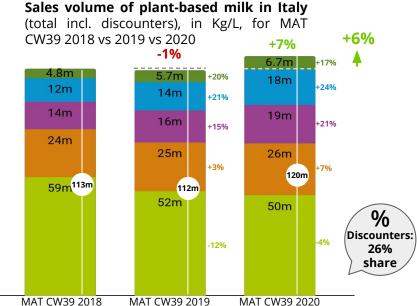
Plant-based sector deep dive: Italy Total plant-based-milk sales





Sales value and volume sales grew 6% over the past periods, with almond and oat showing the strongest growth.





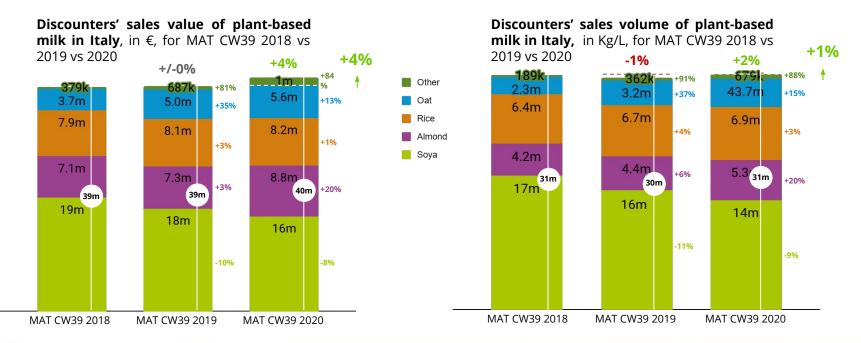


Plant-based sector deep dive: Italy Discounters' plant-based-milk sales



%

A similar picture is evident in discount stores, with almond, oat, and other showing the strongest growth.



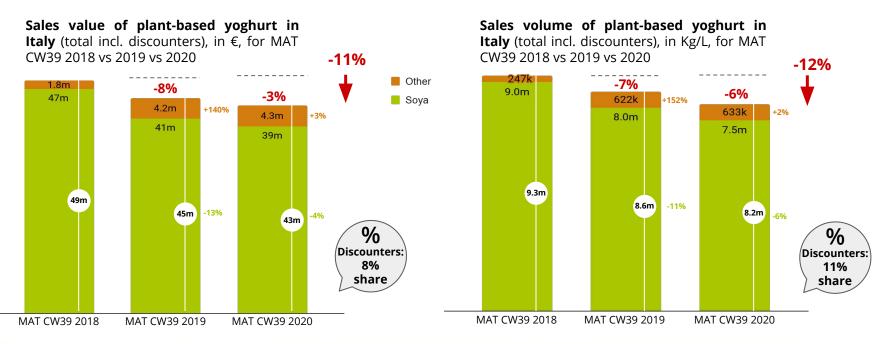


Plant-based sector deep dive: Italy Total plant-based-yoghurt sales





Sales decreased, with the decline driven by soya.



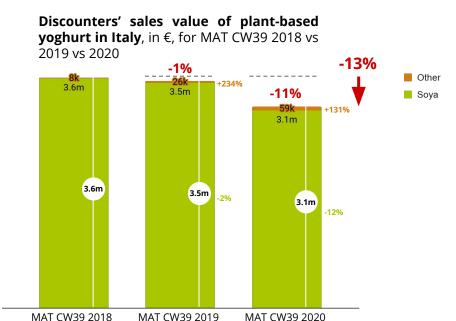


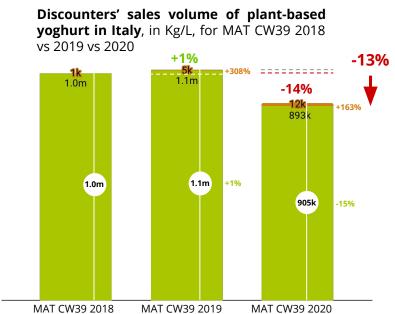
Plant-based sector deep dive: Italy Discounters' plant-based-yoghurt sales



%

A similar picture is evident in discount stores.







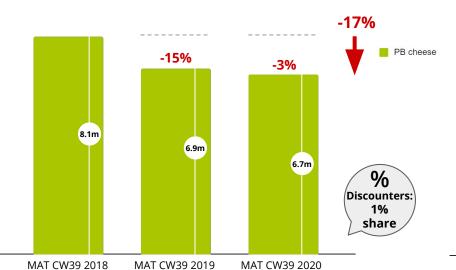
Plant-based sector deep dive: Italy Total plant-based-cheese sales



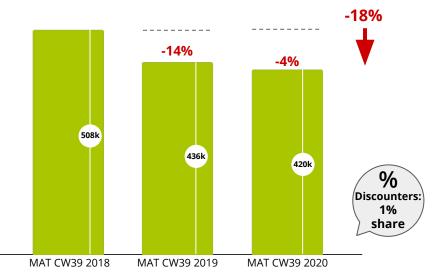


Plant-based cheese showed declining sales. Information about individual market segments is not currently available.

Sales value of plant-based cheese in Italy (total incl. discounters), in €, for MAT CW39 2018 vs 2019 vs 2020



Sales volume of plant-based cheese in Italy (total incl. discounters), in Kg/L, for MAT CW39 2018 vs 2019 vs 2020





Plant-based sector deep dive: Italy Discounters' plant-based-cheese sales

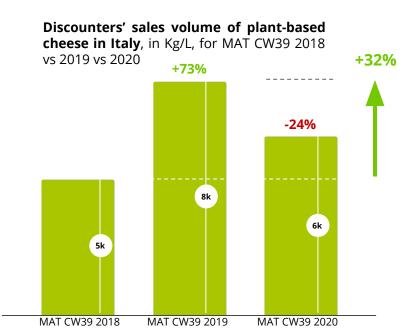


%

A similar picture emerges in discount stores.

Discounters' sales value of plant-based cheese in Italy, in €, for MAT CW39 2018 vs 2019 vs 2020





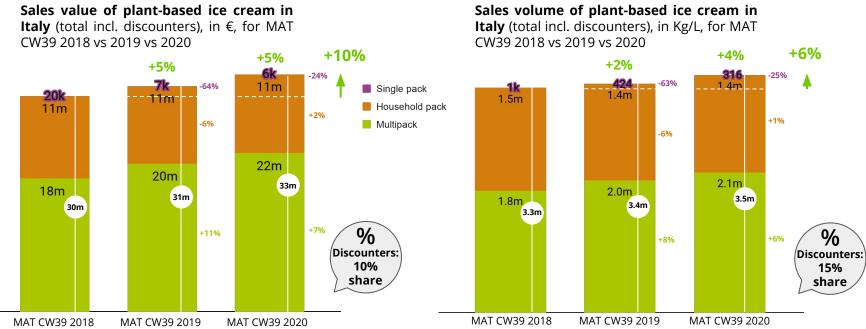


Plant-based sector deep dive: Italy Total plant-based ice cream sales





The plant-based ice-cream sector is dominated by multipacks, which are growing in terms of both sales value and volume.



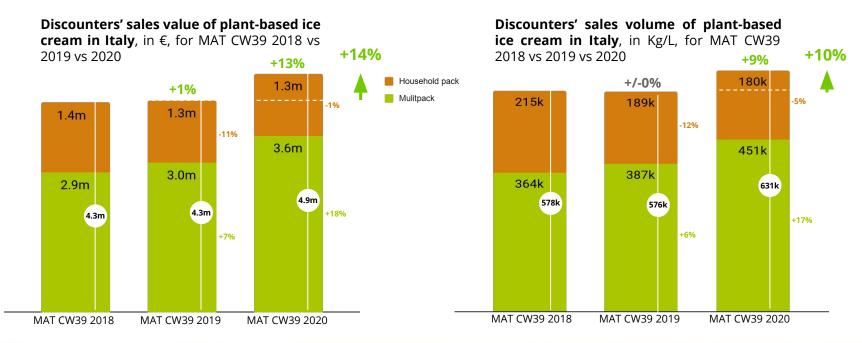


Plant-based sector deep dive: Italy Discounters' plant-based ice cream sales



%

In discounters, multipacks showed even stronger growth in the latest period.





The Netherlands







Agenda - The Netherlands



- 1. Key findings
- 2. Sector overview
- 3. Plant-based categories* deep dive
 - a. Plant-based meat
 - b. Plant-based plain milk
 - c. Plant-based flavoured milk**
 - d. Plant-based cheese
 - e. Plant-based yoghurt

^{*}Plant-based food categories shown here are the plant-based food categories that were available at the time of purchase.

^{**}Plant-based flavoured milk was originally labelled 'flavoured drinks'.



Key findings - The Netherlands





The sales value of plant-based food* grew 50% (€291m) over the past two periods, while sales volume increased by 35% (72m Kg/L). Discount stores recorded even stronger growth, at 83% (€22m) and 58% (7m Kg/L) respectively. Discounters had a 10% share in terms of sales value.



The plant-based food sector is **led by plant-based meat** (€174m), followed by **plant-based milk** (€62m) and **plant-based yoghurt** (€43m). Plant-based cheese (140%) showed the strongest growth in sales value, followed by plant-based yoghurt (35%).



The plant-based meat (€174m) sector is dominated by plant-based burger patties (€42m), followed by plant-based stir fry (€33m) and plant-based meatballs (€21m). All segments showed strong growth.



The plant-based milk (€62m) market is dominated by almond (€20m), followed by soya (€19m) and oat (€14m). Oat milk (69%) showed the strongest growth in sales value.



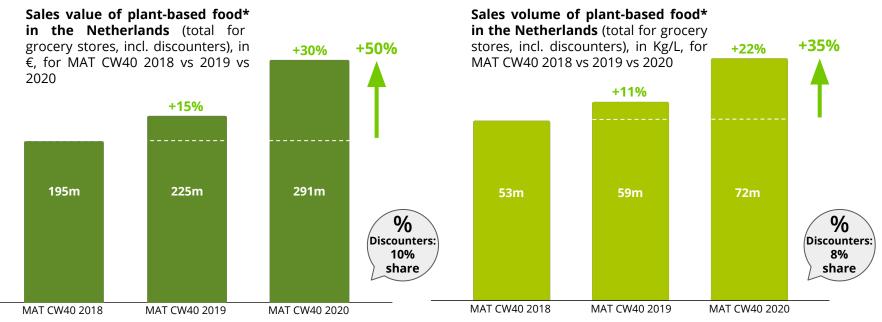
PB cheese (€4.8m) had tremendous growth in sales value over the past two periods, at 400%. PB sliced cheese (€2.7m) was the top seller, followed by PB grated cheese (€1.2m), but no sales in discounters as yet. Several new segments entered the market in MAT 2019 (including PB cheese pieces, PB cheese rolls, and PB cream cheese).



Plant-based sector overview: The Netherlands Total sales value and sales volume



Sales value grew by 50% over the past two periods, while sales volume increased by 35%.



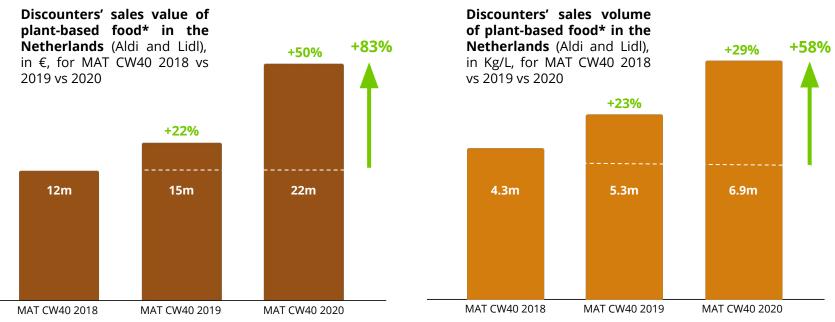
^{*}Plant-based meat (vegan and vegetarian), plant-based milk, plant-based flavoured milk, plant-based yoghurt, plant-based cheese



Plant-based sector overview: The Netherlands Discounters' sales value and sales volume



Discounters experienced even stronger growth over the past two periods.



^{*}Plant-based meat (vegan and vegetarian), plant-based plain milk, plant-based flavoured milk, plant-based yoghurt

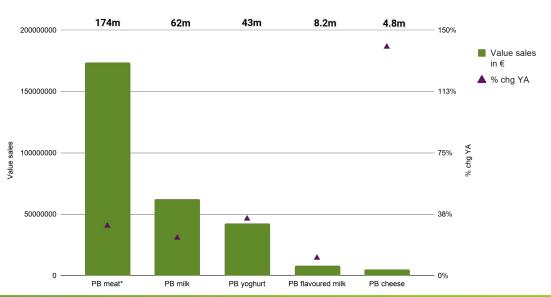


Plant-based sector overview: The Netherlands Total sales value by category



Plant-based meat had the highest sales value. All categories showed huge growth, especially plant-based cheese.

> Sales value of plant-based food in the Netherlands (total for grocery stores, incl. discounters) by category, in €, for MAT CW40 2020



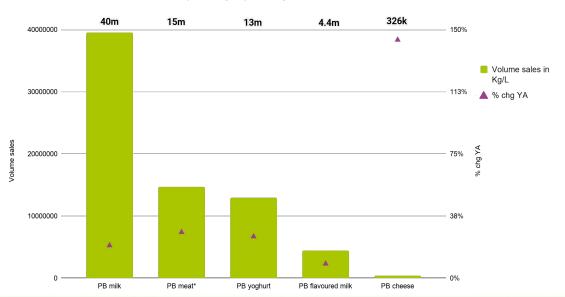


Plant-based sector overview: The Netherlands Total sales volume by category



In terms of volume sales, plant-based milk leads the market, although there is huge growth in all categories.

> Sales volume of plant-based food in the Netherlands (total for grocery stores, incl. discounters) by category, in Kg/L, for MAT CW40 2020



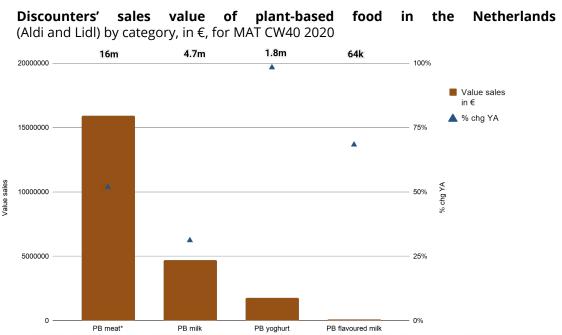


Plant-based sector overview: The Netherlands Discounters' sales value by category



*Vegan and vegetarian

Plant-based meat also had the highest sales in value discounters. All categories showed tremendous growth.



Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Base

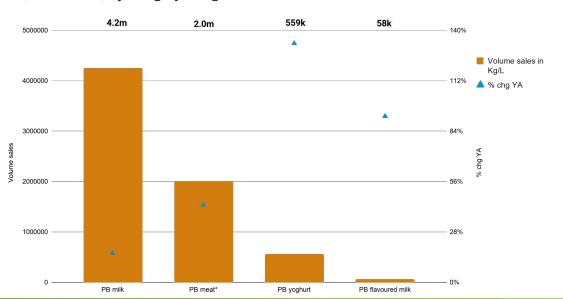


Plant-based sector overview: The Netherlands Discounters' sales volume by category



A similar picture is evident in terms of sales volume, with tremendous growth in all categories.

Discounters' sales volume of plant-based food in the Netherlands (Aldi and Lidl) by category, in Kg/L, for MAT CW40 2020



*Vegan and vegetarian



Plant-based sector deep dive: The Netherlands

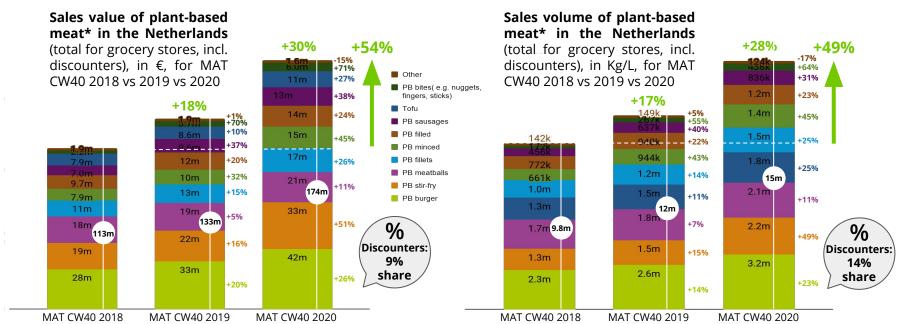


PB sector deep dive: The Netherlands Total plant-based-meat sales





Plant-based burger patties, stir-fry, and meatballs lead the sector, with strong growth in all subsegments.



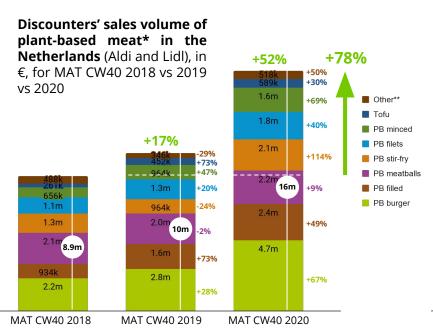


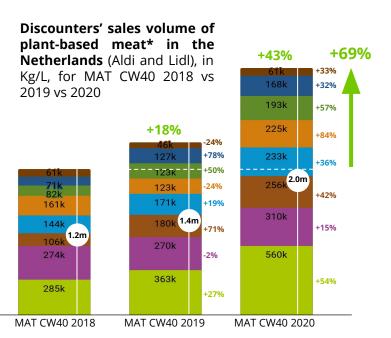
PB sector deep dive: The Netherlands Discounters' plant-based-meat sales





Discounters showed even stronger growth. Plant-based burger patties lead the market, followed by plant-based filled products.





Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Based

^{*}Vegan and vegetarian. **Other includes plant-based sausages, plant-based bites and other

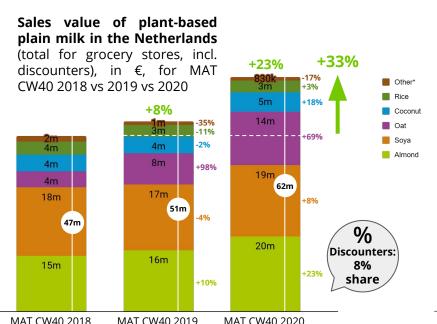


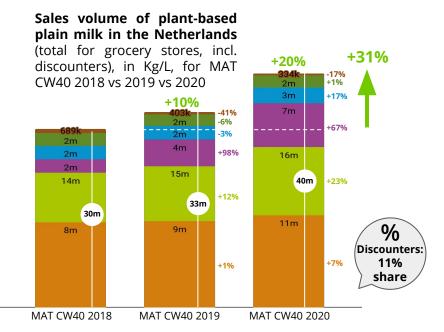
PB sector deep dive: The Netherlands Total plant-based plain-milk sales





Soya and almond are the most developed subsegments, with oat, especially, showing huge growth.





*Other includes blend, cashew, hazelnut, spelt, and other

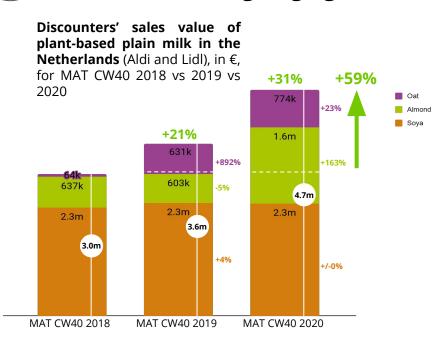


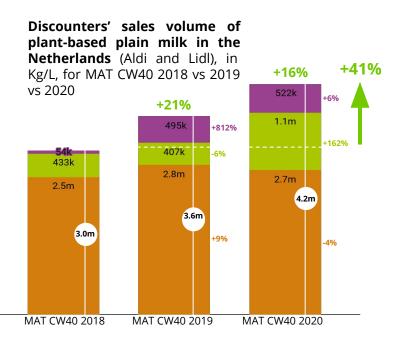
PB sector deep dive: The Netherlands Discounters' plant-based plain-milk sales



%

Soya and almond are also leading the category in discounters, with almond showing huge growth.





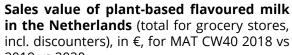


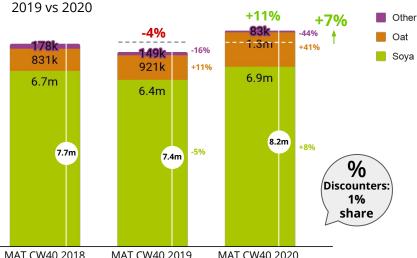
PB sector deep dive: The Netherlands Total plant-based flavoured-milk sales



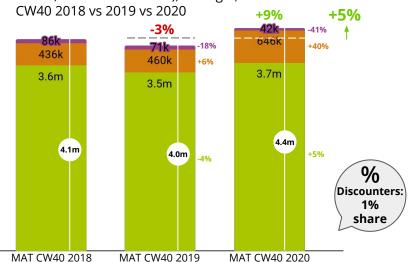


Soya clearly dominates the plant-based flavoured-milk market, followed by oat.









^{*}Other includes almond, coconut, rice, blend, hazelnut, cashew, and other

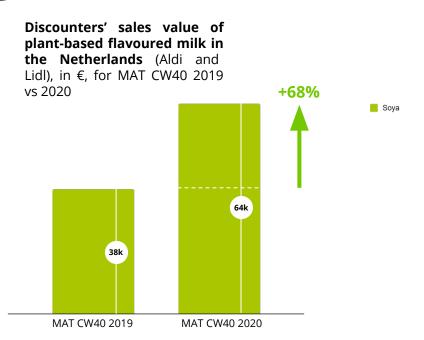


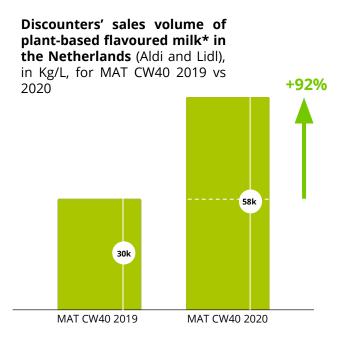
PB sector deep dive: The Netherlands Discounters' PB flavoured-milk sales





In discounters, only soya is available. The first sales of plant-based flavoured-milk were in MAT CW40 2019.





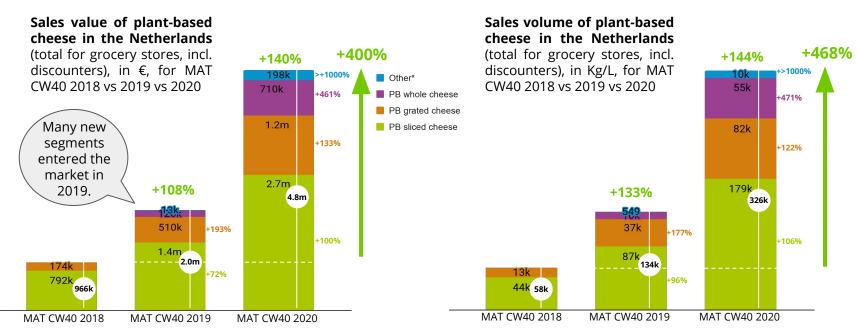


PB sector deep dive: The Netherlands Total plant-based-cheese sales





All plant-based-cheese subsegments showed huge growth in both periods. No plant-based cheese available in discounters, as yet.



^{*}Other includes: plant-based cheese pieces, plant-based cheese roll, plant-based cream cheese, and other

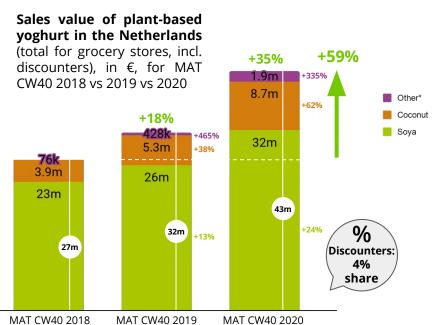


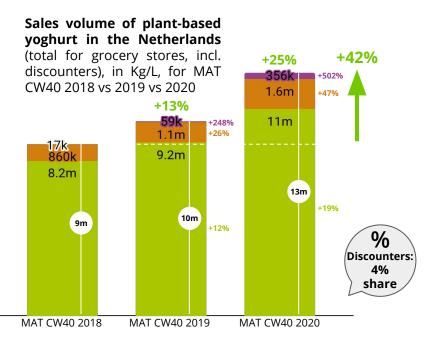
PB sector deep dive: The Netherlands Total plant-based-yoghurt sales





The plant-based yoghurt market is dominated by soya, with coconut and other showing huge sales increases.





*Other includes blend, almond, oat, cashew

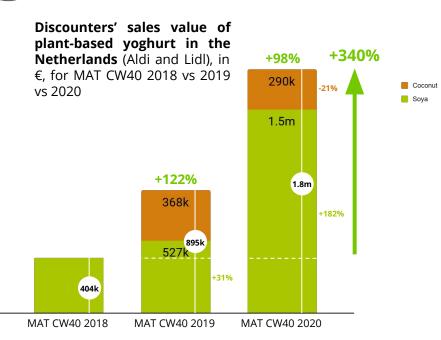


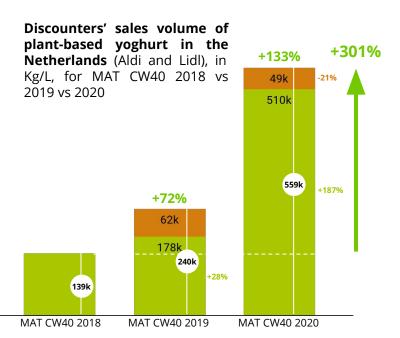
PB sector deep dive: The Netherlands Discounters' plant-based-yoghurt sales



%

Also in discount soya dominates the market followed by coconut. Here soya with huge growth.









Poland



Agenda - Poland

- 1. Key findings
- 2. Sector overview
- 3. Plant-based categories* deep dive
 - a. Plant-based plain milk**
 - b. Plant-based flavoured milk***

^{*}Plant-based food categories shown here are the plant-based food categories that were available at the time of purchase.

^{**} Plant-based plain milk was originally labelled 'non-animal milk - natural'. ***Plant-based flavoured milk was originally labelled 'non-animal milk - flavoured'.



Key findings - Poland





The sales value of plant-based milk grew by 62% (€43m) over the past two periods, while sales volume increased by 75% (26m Kg/L). Discount stores recorded even stronger growth, at 122% (€21m) and 126% (15m Kg/L) respectively. Discounters had a very high share in terms of sales value, at 49%.



Plant-based plain milk (€37m) accounts for almost 90% of plant-based milk sales (€43m). The remaining 10% come from **plant-based flavoured milk** (€5.7m).



The plant-based plain-milk sector is dominated by almond (€9.1m), followed by oat (€7.5m) and soya (€6.9m). The sector showed double-digit growth in sales value (76%) and even triple-digit growth in discounters (126%) over past two periods.



The plant-based flavoured-milk sector is dominated by soya (€3.8m), followed by rice (€653k) and oat (€630m). Discount stores showed triple-digit growth over the past two periods.

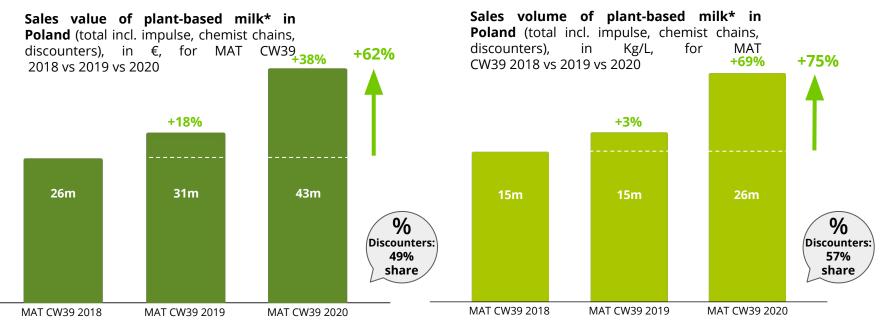


Plant-based sector overview: Poland Total sales value and sales volume





Sales value grew 62% over the past two periods, while sales volume increased by 75%.



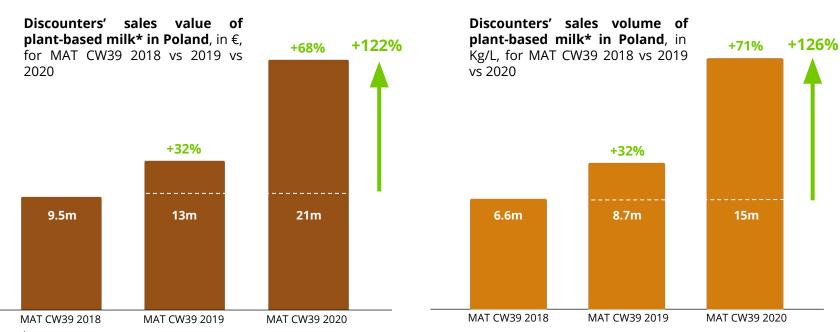


Plant-based sector overview: Poland Discounters' sales value and sales volume





Discounters experienced even stronger growth over the past two periods.





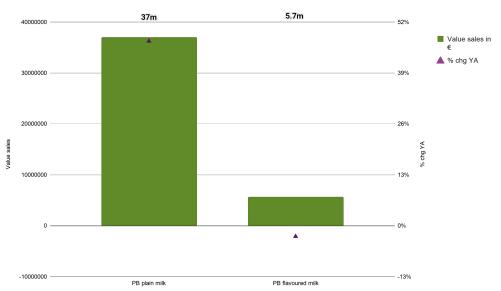
Plant-based sector overview: Poland Total sales value by category





In terms of sales value, plant-based plain milk leads the sector with a strong growth rate.

Sales value of plant-based milk in Poland (total incl. impulse, chemist chains, discounters) by category, in €, for MAT CW39 2020



Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Base



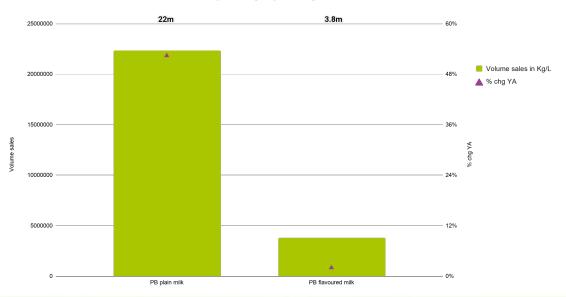
Plant-based sector overview: Poland Total sales volume by category





A similar picture is evident in terms of volume sales, with both segments showing growth.

Sales volume of plant-based milk in Poland (total incl. impulse, chemist chains, discounters) by category, in Kg/L, for MAT CW39 2020



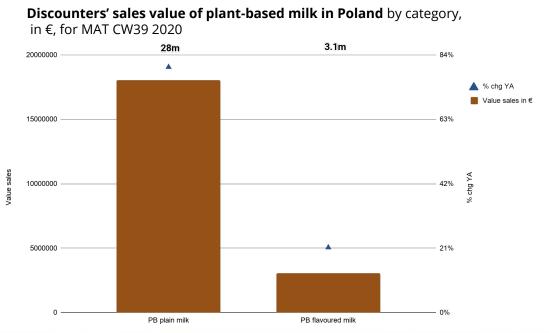
Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Based



Plant-based sector overview: Poland Discounters' sales value by category



Plant-based plain milk also had the highest sales value in discounters, with both categories showing huge growth.



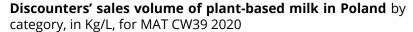
Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Base

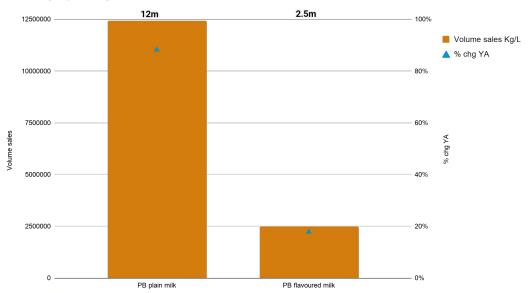


Plant-based sector overview: Poland Discounters' sales volume by category



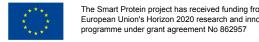
A similar picture emerges in terms of sales volume, with tremendous growth evident for both categories.





Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Baser





Plant-based sector deep dive: Poland

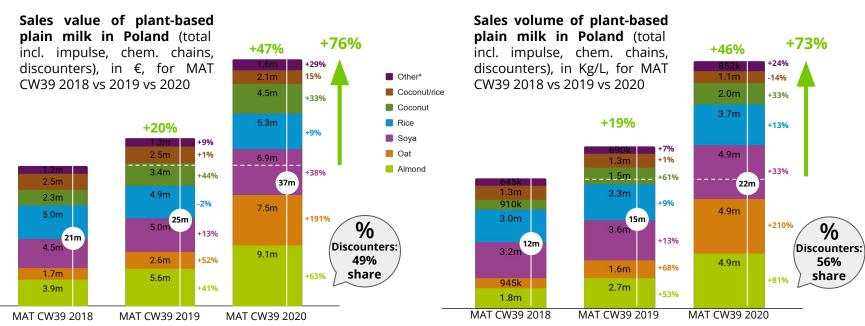


Plant-based sector deep dive: Poland Total plant-based plain-milk sales





Almond milk had the highest sales value and volume, followed by oat and soya, with oat showing massive growth.



^{*}Other includes >30 subsegments, most dominant cashew, oat/almond and spelt

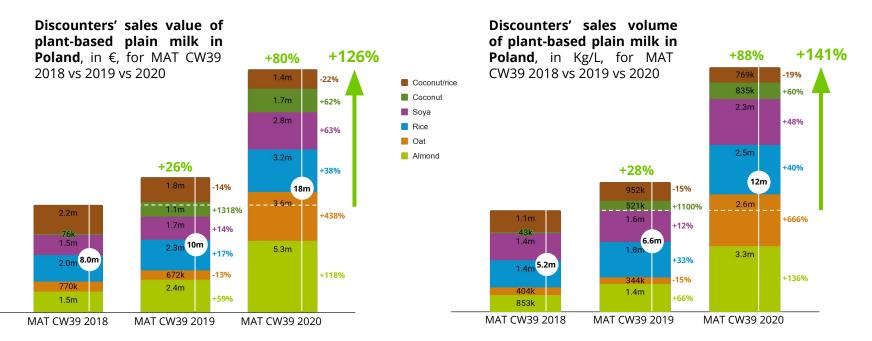


Plant-based sector deep dive: Poland Discounters' plant-based plain-milk sales



%

A similar picture is evident in discount stores, but here rice comes in at third place.





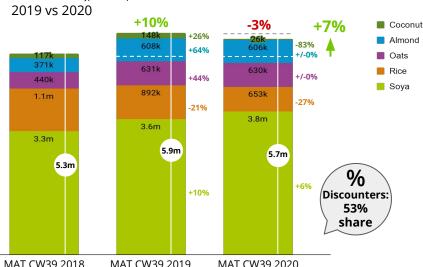
Plant-based sector deep dive: Poland Total plant-based flavoured-milk sales



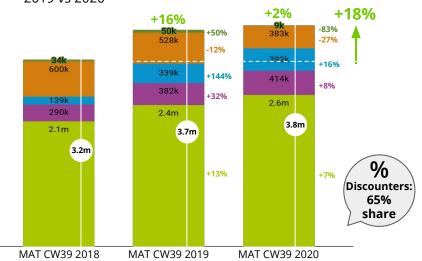


The plant-based flavoured-milk segment is dominated by soya, followed by rice, oat, and almond.

Sales value of plant-based flavoured milk in Poland (total incl. impulse, chem. chains, discounters), in €, for MAT CW39 2018 vs



Sales volume of plant-based flavoured milk in Poland (total incl. impulse, chem. chains, discounters), in Kg/L, for MAT CW39 2018 vs 2019 vs 2020



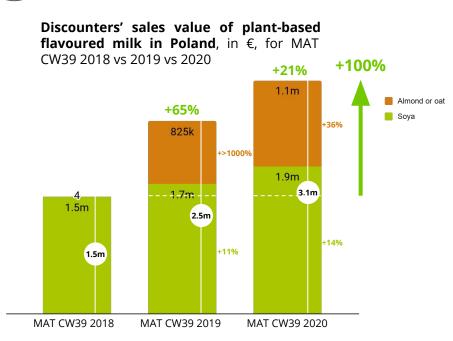


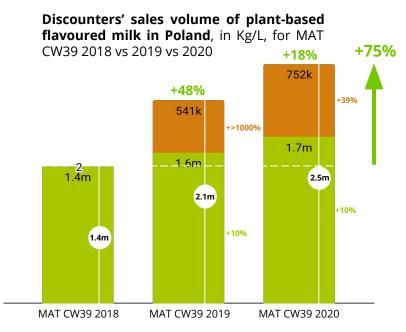
Plant-based sector deep dive: Poland Discounters' PB flavoured-milk sales



%

Tremendous growth is evident in discount stores, although only soya and almond/oat are offered.









Romania





Agenda - Romania



- 1. Key findings
- 2. Sector overview
- 3. Plant-based categories* deep dive
 - a. Plant-based meat
 - b. Plant-based plain milk**
 - c. Plant-based flavoured milk***

^{*}Plant-based food categories shown here are the plant-based food categories that were available at the time of purchase.

^{**}Plant-based plain milk was originally labelled "milk substitutes - non flavoured". ***Plant-based flavoured milk was originally labelled "milk substitutes - flavoured drink".



Key findings - Romania





The sales value of plant-based food* grew by 56% (€21m) over the past two periods, while sales volume increased by 51% (8.6m Kg/L). Discount stores recorded much stronger growth, with 201% (€2.1m) and 211% (1.3m Kg/L) respectively. Discounters had a 10% share in terms of sales value.



The plant-based-food sector is **led by plant-based plain milk** (€14m), followed by **plant-based meat** (€5.0m) and **plant-based flavoured milk** (€2.7m). All categories showed double-digit growth in sales value.



The plant-based meat (€5.0m) sector is dominated by plant-based sausages (€1.3m), followed by plant-based meat spreads (€1.2m) and plant-based prepared meats (€1.2m). Discounters showed a triple-digit growth over the last two periods (154%).



The plant-based plain-milk (€14m) sector showed strong growth in sales value, especially in the latest period (50%). Discounters showed triple-digit growth in sales value over the last two periods (316%).



Plant-based flavoured milk (€2.7m) also had strong double-digit growth in sales value over the last two periods (48%).

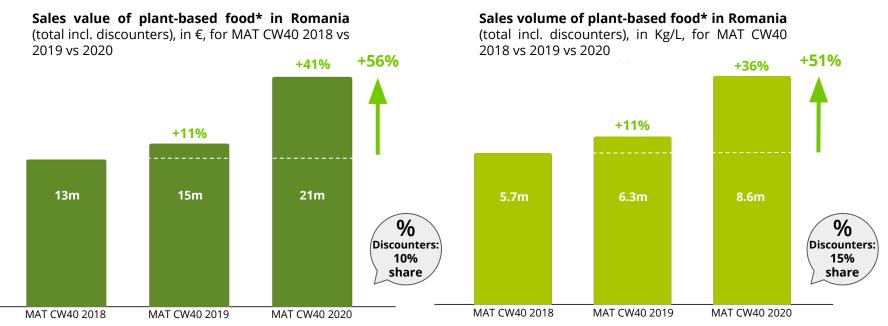


Plant-based sector overview: Romania Total sales value and sales volume





Sales value grew 56% over the past two periods, while sales volume increased by 51%.



^{*}Plant-based meat (vegan and vegetarian), plant-based milk (plain and flavoured)

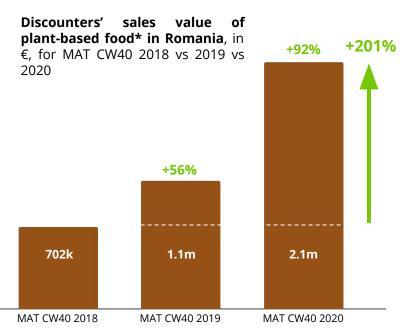


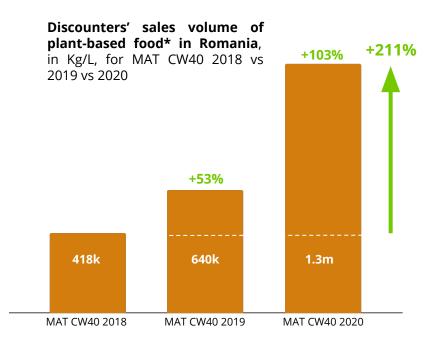
Plant-based sector overview: Romania Discounters' sales value and sales volume





Discounters showed even stronger growth over the past two periods, especially in the latest period.





^{*}Plant-based meat (vegan and vegetarian, no dairy-ingredients), plant-based milk (plain and flavoured)

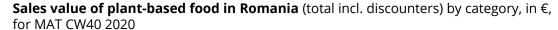


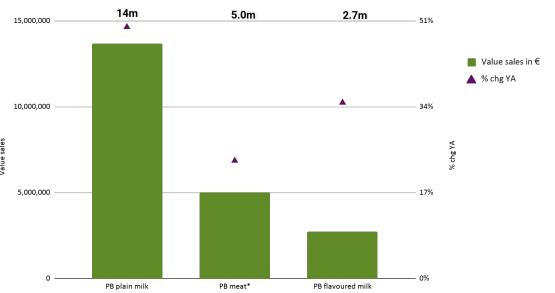
Plant-based sector overview: Romania Total sales value by category





Plant-based plain milk had the highest sales value, followed by plant-based meat. All categories showed huge growth.







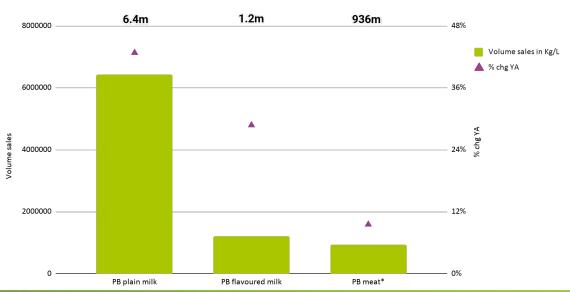
Plant-based sector overview: Romania Total sales volume by category





Plant-based plain milk also had the highest sales volume, but this time followed by plant-based flavoured milk.

Sales volume of plant-based food in Romania (total incl. discounters) by category, in Kg/L, for MAT CW40 2020



*Vegan and vegetarian

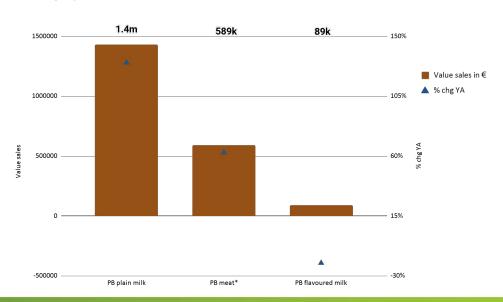


Plant-based sector overview: Romania Discounters' sales value by category



Plant-based plain milk also had the highest sales value in discount stores.

Discounters' sales value of plant-based food in Romania by category, in €, for MAT CW40 2020



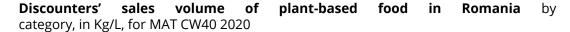


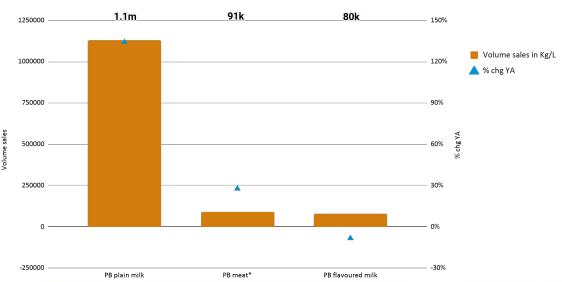
Plant-based sector overview: Romania Discounters' sales volume by category



%

A similar picture is evident in terms of sales volume in discount stores.







Plant-based sector deep dive: Romania

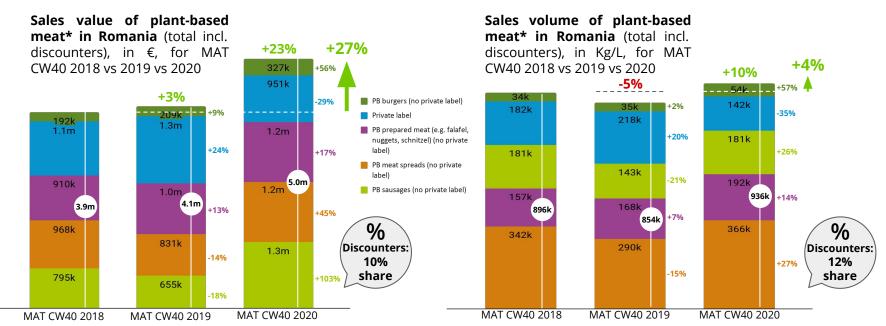


Plant-based sector deep dive: Romania Total plant-based-meat sales





All non-private-label plant-based meat subcategories showed huge growth in terms of both sales value and volume.

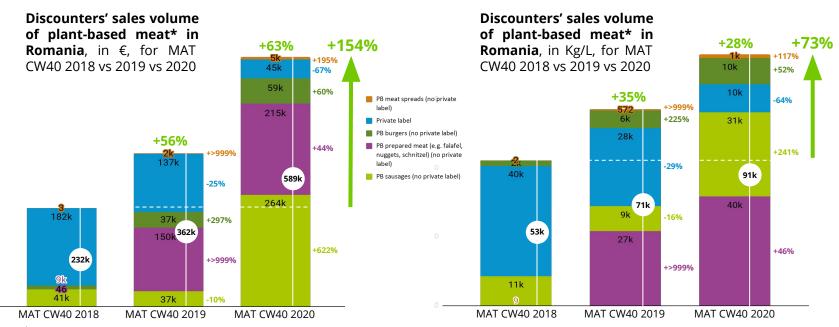




Plant-based sector deep dive: Romania Discounters' plant-based-meat sales



In discounters, a similar picture emerges, but with even stronger growth.



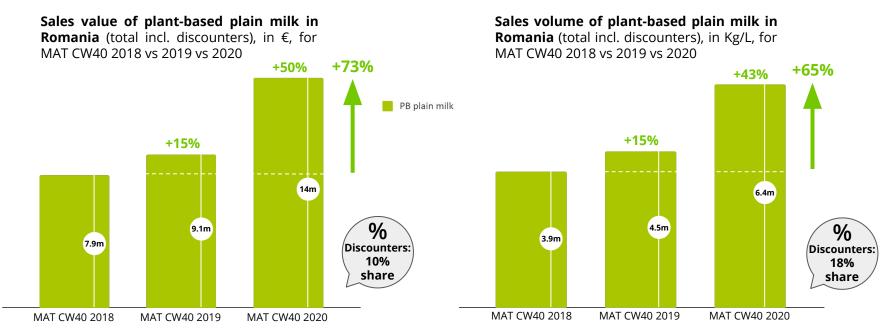


Plant-based sector deep dive: Romania Total plant-based plain-milk sales





Both value and volume sales showed huge growth, especially in the latest period.



Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Based



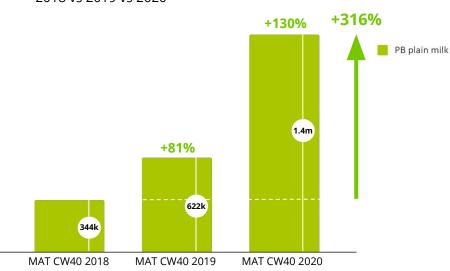
Plant-based sector deep dive: Romania Discounters' plant-based plain-milk sales



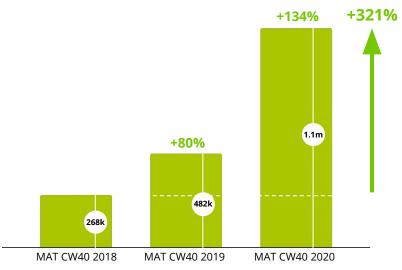


Discounters showed even stronger growth.

Discounters' sales value of plant-based plain milk in Romania, in €, for MAT CW40 2018 vs 2019 vs 2020



Discounters' sales volume of plant-based plain milk in Romania, in Kg/L, for MAT CW40 2018 vs 2019 vs 2020



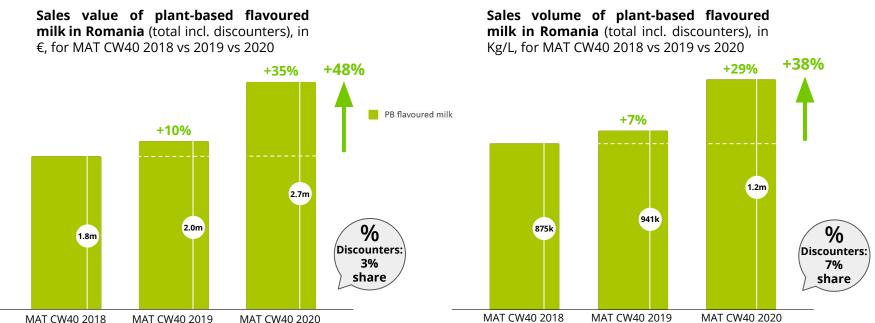


Plant-based sector deep dive: Romania Total plant-based flavoured-milk sales





Both value and volume sales showed huge growth, especially in the latest period.





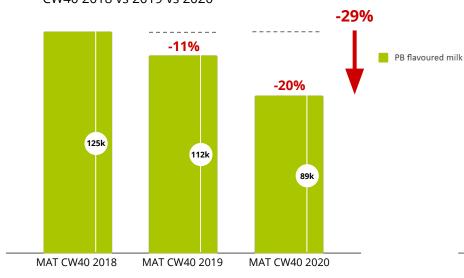
Plant-based sector deep dive: Romania Discounters' PB flavoured-milk sales



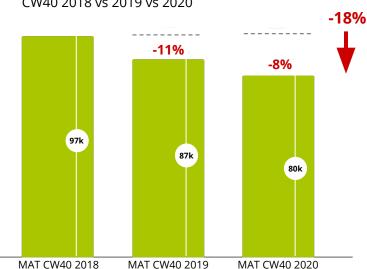


However, a very different picture is evident in discounters.

Discounters' sales value of plant-based flavoured milk in Romania, in €, for MAT CW40 2018 vs 2019 vs 2020



Discounters' sales volume of plant-based flavoured milk in Romania, in Kg/L, for MAT CW40 2018 vs 2019 vs 2020



Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Based





Spain







Agenda - Spain



- 1. Key findings
- 2. Sector overview
- 3. Plant-based categories* deep dive
 - a. Plant-based meat
 - b. Plant-based milk**
 - c. Plant-based yoghurt

^{*}Plant-based food categories shown here are the plant-based food categories that were available at the time of purchase.

^{**} Plant-based milk was originally labelled 'plant-based beverages'.



Key findings - Spain





The sales value of plant-based food* grew by 48% (€448m) over the past two periods, while sales volume increased by 20% (265m Kg/L). Discount stores also showed strong growth, at 35% (€33m) and 37% (31m Kg/L) respectively. Discounters had a 7% share in terms of sales value.



The plant-based-food sector is **led by plant-based milk** (€318m), followed by **plant-based meat** (€87m) and **plant-based yoghurt** (€42m). All categories showed double-digit growth.



In terms of plant-based meat (€87m), almost 90% of sales come from plant-based refrigerated meat (€80m). The remaining sales from plant-based frozen (€3.4m) and ambient meat (€3.1m).



The plant-based milk (€318m) sector is dominated by oat (€125m), followed by soya (€91m) and almond (€57m). Oat showed the strongest growth in sales value growth in the overall market (25%) as well as in discount stores (49%).



Plant-based yoghurt also showed double-digit growth (55%). Discounters had low levels of sales in MAT CW41 2018, increasing strongly in the following two periods.

*Includes plant-based meat (vegan and vegetarian), plant-based milk, plant-based yoghurt; all numbers refer to MAT CW41 2020 if not stated otherwise.

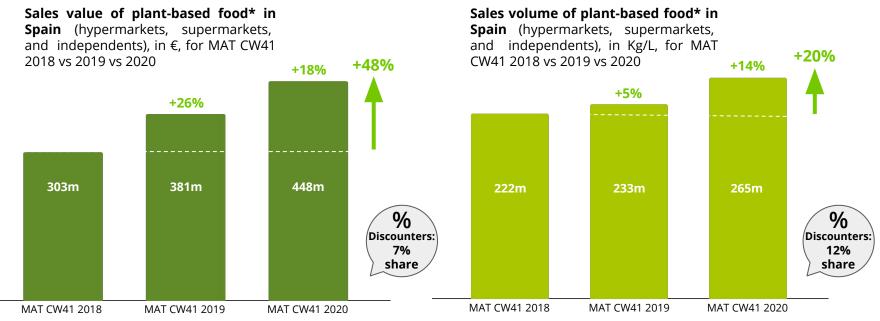


Plant-based sector overview: Spain Total sales value and sales volume





Sales value grew 48% over the past two periods, while sales volume increased by 20%.



^{*}Plant-based meat (vegan and vegetarian, only MAT CW41 2019 and MAT CW41 2020), plant-based milk, plant-based yoghurt

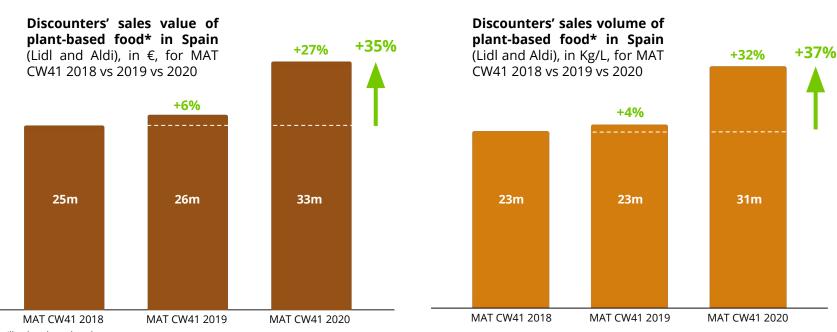


Plant-based sector overview: Spain Discounters' sales value and sales volume





Discounters experienced even stronger growth over the past two periods.



^{*}Plant-based milk, plant-based yoghurt



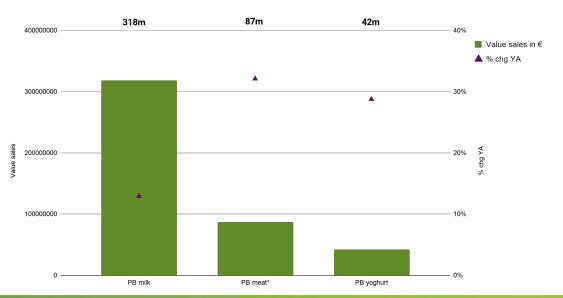
Plant-based sector overview: Spain Total sales value by category





Plant-based milk showed the highest sales value, followed by plant-based meat. All categories showed huge growth.

Sales value of plant-based food in Spain (hypermarkets, supermarkets, and independents) by category, in €, for MAT CW41 2020





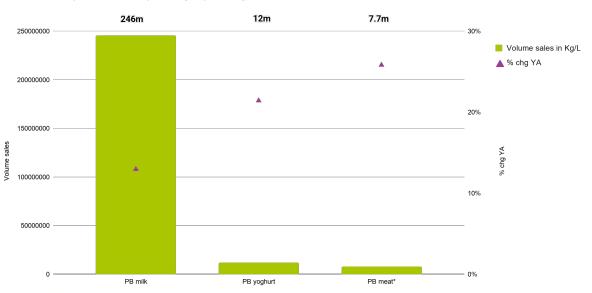
Plant-based sector overview: Spain Total sales volume by category





Plant-based milk also leads in terms of sales volume, but here is followed by plant-based yoghurt.

Sales volume of plant-based food in Spain (hypermarkets, supermarkets, and independents) by category, in Kg/L, for MAT CW40 2020





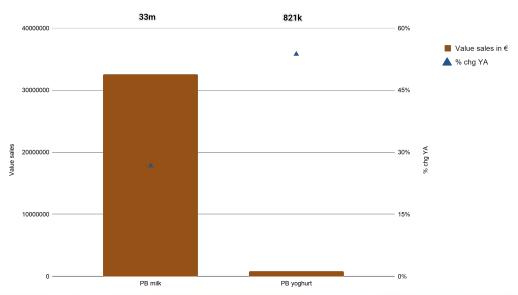
Plant-based sector overview: Spain Discounters' sales value by category





Plant-based milk also had the highest sales value in discounters. No meat alternatives are available in discounters, as yet.

Discounters' sales value of plant-based food in Spain (Lidl and Aldi) by category, in €, for MAT CW41 2020



Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Base



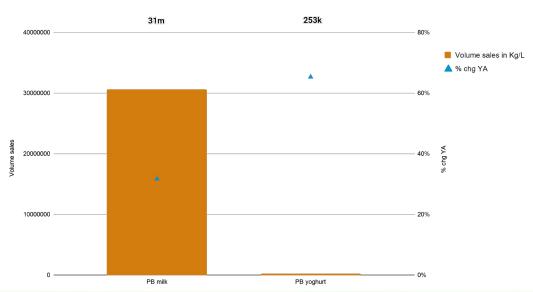
Plant-based sector overview: Spain Discounters' sales volume by category





A similar picture is evident in terms of sales volume, with both PB milk and yoghurt alternatives showing tremendous growth.

Discounters' sales volume of plant-based food in Spain (Lidl and Aldi) by category, in Kg/L, for MAT CW41 2020



Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Baser



Plant-based sector deep dive: Spain



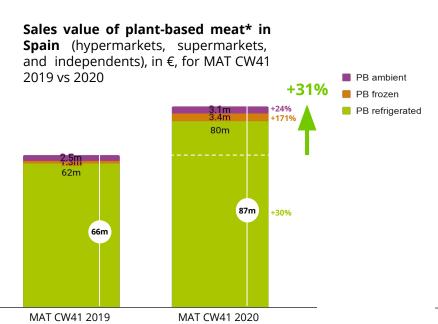


Plant-based sector deep dive: Spain Total plant-based-meat sales





More than 90% of sales of plant-based meat come from plant-based refrigerated meat.



Sales volume of plant-based meat* in Spain (hypermarkets, supermarkets, and independents), in Kg/L, for MAT CW41 2019 vs 2020



Source: Nielsen MarketTrack MAT=Moving Annual Total PB=Plant-Basi

^{*}Vegan and vegetarian, only the last two MATs are recorded in the Nielsen database



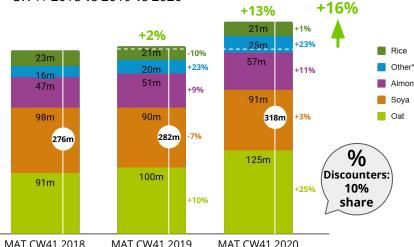
Plant-based sector deep dive: Spain Total plant-based-milk sales

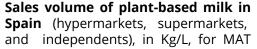


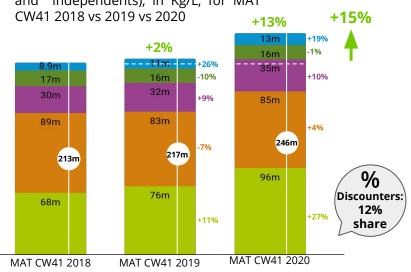


Oat showed the highest sales value and volume in the latest period, outperforming soya.









*Other includes rice/coconut, coconut, spelt, hazelnut, rice/hazelnut, oat/almond, oat/cocoa, oat/nut, dry nuts, quinoa/rice, coconut/almond, wheat, hemp, rice/soya, quinoa, sesame, and barley



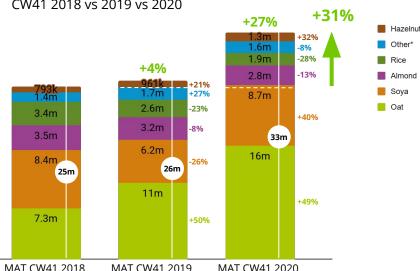
Plant-based sector deep dive: Spain Discounters' plant-based-milk sales

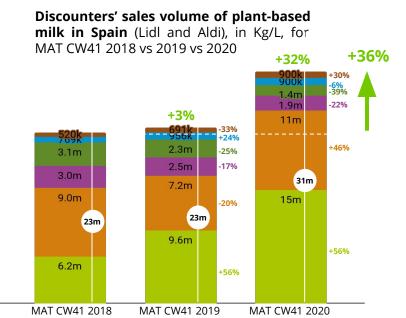




A similar picture is evident in discounters, with oat showing huge growth, followed by soya and almond.

Discounters' sales value of plant-based milk in Spain (Lidl and Aldi), in €, for MAT
CW41 2018 vs 2019 vs 2020





Source: Nielsen MarketTrack
MAT=Moving Annual Tota

^{*}Other includes rice/coconut, spelt, coconut, rice/hazelnut, oat/nut, rice/soya, quinoa/rice

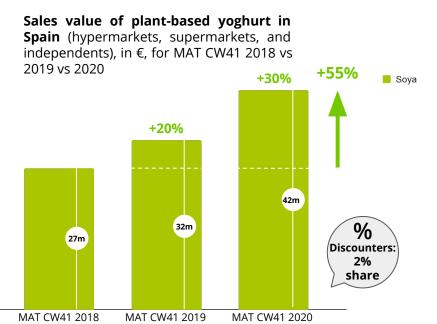


Plant-based sector deep dive: Spain Total plant-based-yoghurt sales





Plant-based yoghurt showed promising growth, especially in the latest period. Only soya is available for sale.



Sales volume of plant-based yoghurt in **Spain** (hypermarkets, supermarkets, and independents), in Kg/L, for MAT CW41 2018 vs 2019 vs 2020 +42% +20% +16% 12m 10m 8.5m Discounters: 2% share

MAT CW41 2020

MAT CW41 2019

Source: Nielsen MarketTrack
MAT=Moving Annual Total

MAT CW41 2018

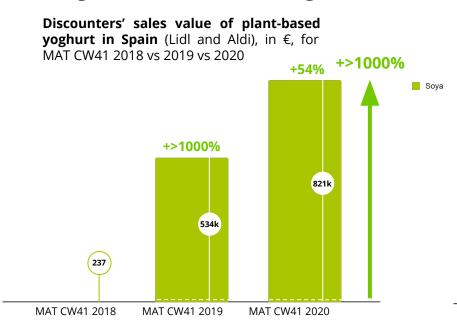


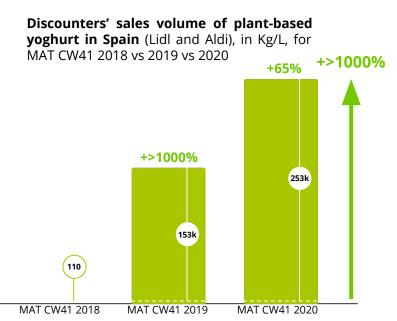
Plant-based sector deep dive: Spain Discounters' plant-based-yoghurt sales



%

A similar picture emerges in discount stores, but here growth is even stronger.





Source: Nielsen MarketTrack
MAT=Moving Annual Total





United Kingdom





- Agenda Italy
 - 1. Key findings
 - 2. Plant-based Sector overview*
 - 3. Plant-based categories** deep dive
 - a. Plant-based meat
 - b. Plant-based milk
 - c. Plant-based cheese
 - d. Plant-based yoghurt
 - e. Plant-based baked goods (confectionery, biscuits, snacks)



Key findings – UK





The sales value of plant-based food* grew by 73% (€750m) over the past two periods, while sales volume increased by 67% (206m Kg/L).



The plant-based food sector is **led by plant-based meat** (€502m), followed by **plant-based milk** (€226m). All categories showed double-digit growth, except for plant-based baked goods .



In terms of sales value of **plant-based meat** (\le 502m), PB frozen meat (\le 231m) was outperformed by PB refrigerated meat (\le 264m) in the last period. Plant-based sausage is the most dominant segment, both in terms of plant-based refrigerated (\le 53m) and frozen (\le 50m) meat.



Plant-based milk (107%) and **plant-based cheese** (165%) both showed triple-digit sales growth in sales value over the last two periods.



Plant-based baked goods (€1.2m) also showed strong growth in sales value over the last two periods (19%), especially plant-based confectionery in the latest period (94%).



Plant-based sector overview: UK Total sales value and sales volume





Sales value grew 73% over the past two periods, while sales volume increased by 67%.

Sales value of plant-based food* in UK (total incl. grocery and impulse, excl. Aldi and Lidl), in €, for MAT CW42 2018 vs 2019 vs 2020



Sales volume of plant-based food* in UK (total incl. grocery and impulse, excl. Aldi and Lidl), in Kg/L, for MAT CW42 2018 vs



^{*}Plant-based meat (vegan and vegetarian), plant-based milk, plant-based yoghurt, plant-based cheese, plant-based baked goods (confectionery, biscuits, snacks)



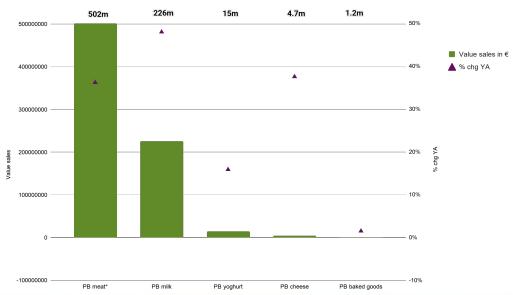
Plant-based sector overview: UK Total sales value by category





Plant-based meat has the highest value sales followed by plant-based milk, with all categories showing huge growth.

> Sales value of plant-based food in UK (total incl. grocery and impulse, excl. Aldi and Lidl) by category, in €, for MAT CW42 2020



*Vegan and vegetarian



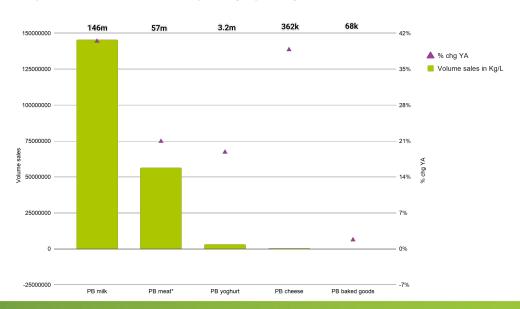
Plant-based sector overview: UK Total sales volume by category





In terms of sales volume, plant-based milk leads the market, followed by plant-based meat.

> Sales volume of plant-based food in UK (total incl. grocery and impulse, excl. Aldi and Lidl) by category, in Kg/L, for MAT CW42 2020





* * * * * * *

Plant-based sector deep dive: UK





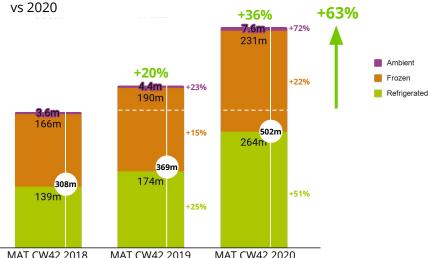
Plant-based sector deep dive: UK ✓ Total plant-based-meat sales



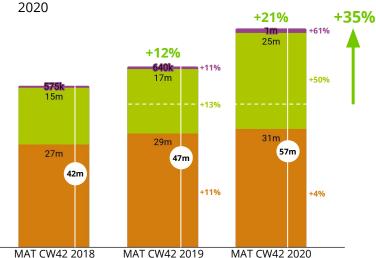


Plant-based refrigerated meat had the highest sales value, while PB frozen meat had the highest sales volume in the latest period.

Sales value of plant-based meat* in UK (total incl. grocery and impulse, excl. Aldi and Lidl), in €, for MAT CW42 2018 vs 2019



Sales volume of plant-based meat* in UK (total incl. grocery and impulse, excl. Aldi and Lidl), in Kg/L, for MAT CW42 2018 vs 2019 vs



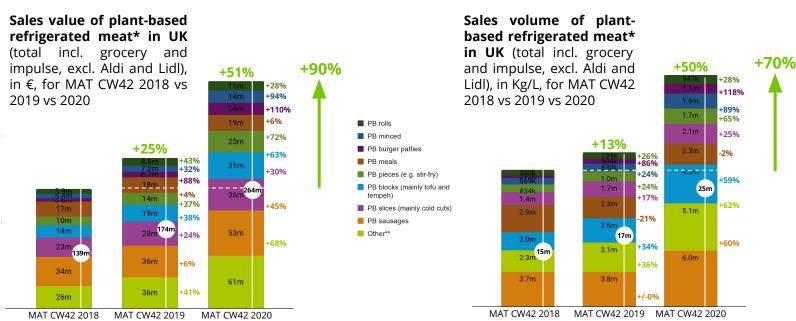


Plant-based sector deep dive: UK Total plant-based refrigerated-meat sales





There is great product variety in terms of plant-based refrigerated meat, with almost all segments showing huge growth.



^{*}Vegan and vegetarian. **Includes meatballs, steak, escalopes, pie, fillet, bites, kiev, nuggets, chunks, strips, falafel, tofu, and other



Plant-based sector deep dive: UK Total plant-based frozen-meat sales



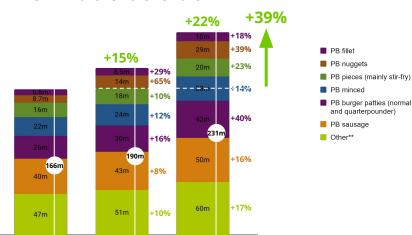


Plant-based burger patties are much more relevant in the frozen segment. Most categories showed strong growth.

Sales value of plant-based frozen meat* in UK (total incl. grocery and impulse, excl. Aldi and Lidl), in €, for MAT CW42 2018 vs 2019 vs 2020

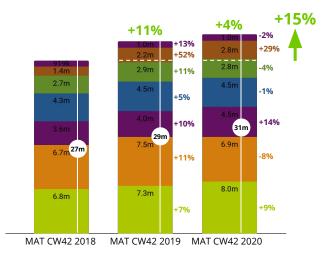
MAT CW42 2019

MAT CW42 2018



MAT CW42 2020

Sales volume of plant-based frozen meat* in UK (total incl. grocery and impulse, excl. Aldi and Lidl), in Kg/L, for MAT CW42 2018 vs 2019 vs 2020



^{*}Vegan and vegetarian. **Includes pie, meatballs, roll, bites, escalopes, strips, meal, slice, fingers, steak, kiev, schnitzel, drumsticks

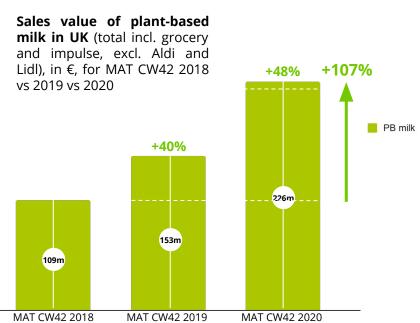


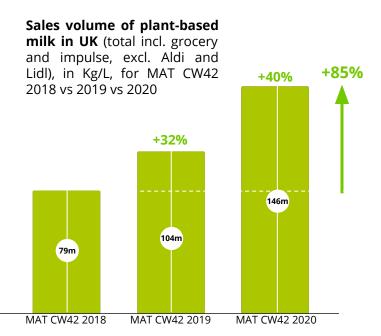
Plant-based sector deep dive: UK Total plant-based-milk sales





Sales value of plant-based milk grew 107% over the past two periods, while sales volume increased by 85%.







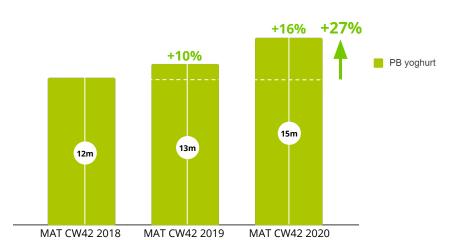
Plant-based sector deep dive: UK ✓ Total plant-based-yoghurt sales



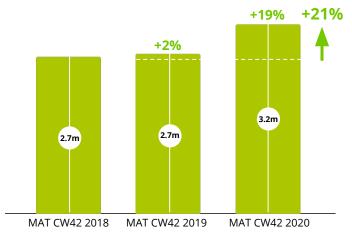


Plant-based yoghurt showed steady growth, in terms of both sales value and volume.

Sales value of plant-based yoghurt in UK (total incl. grocery and impulse, excl. Aldi and Lidl), in €, for MAT CW42 2018 vs 2019 vs 2020



Sales volume of plant- based yoghurt in UK (total incl. grocery and impulse, excl. Aldi and Lidl), in Kg/L, for MAT CW42 2018 vs 2019 vs 2020





≥ | Plant-based sector deep dive: UK Total plant-based-cheese sales

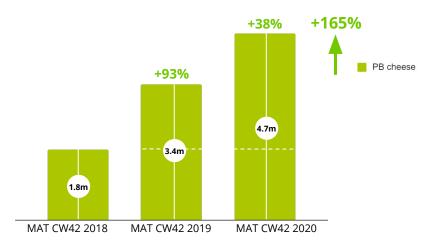


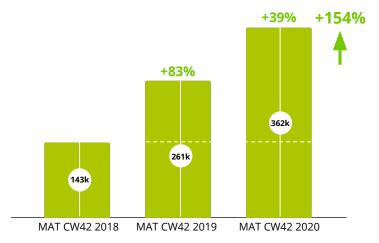


Plant-based cheese showed tremendous growth rates over the past two periods.

Sales value of plant-based cheese in **UK** (total incl. grocery and impulse, excl. Aldi and Lidl), in €, for MAT CW42 2018 vs 2019 vs 2020

Sales volume of plant-based cheese in **UK** (total incl. grocery and impulse, excl. Aldi and Lidl), in Kg/L, for MAT CW42 2018 vs 2019 vs 2020







Plant-based sector deep dive: UK ✓ Total plant-based-baked-goods sales

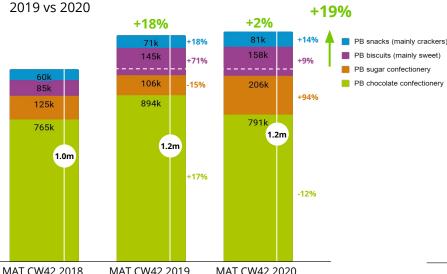




Plant-based bakery also with growth, especially plant-based sugar confectionery

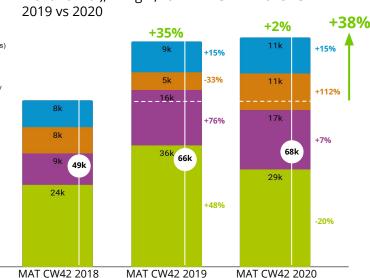


MAT CW42 2019



MAT CW42 2020

Sales volume of plant-based baked goods in UK (total incl. grocery and impulse, excl. Aldi and Lidl), in Kg/L, for MAT CW42 2018 vs







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Thank you!

For more information, please visit the Smart Protein website and sign up for the newsletter!