

## Where's the beef? How flexitarians are shaking up the food industry

Increasing numbers of people are moving to a plant-based diet. And as one leading food website announces it will no longer carry recipes including beef, we think changing consumer habits will play an important role in reaching global emissions' targets



KFC teamed up with Beyond Meat to make its meat-free 'chicken' products

### Where's the beef?

Some called it 'cancel culture' gone mad, others a bold welcome step. But the decision this week by the Epicurious website to drop all beef recipes is clearly a reaction to a growing trend away from meat-eating which could have major implications not just for the meat and dairy sector but also for the reduction of greenhouse gas emissions. Epicurious told its near nine million users via Twitter that the decision was not 'anti-cow' but 'pro-planet'.

And when you consider that almost 15% of greenhouse gas emissions globally come from livestock and everything involved in raising it, they may have a point. Not least because 61% of those emissions can be traced back to beef. Epicurious wants the conversation about sustainable cooking to become louder and we think it will as the move will surely inspire consumers and other companies to become more open to a diet with fewer animal-based proteins or none at all.

## A demographic shift in flexitarian diet demand

And all this means that more consumers and companies are shifting away from animal-based proteins and the demand for plant-based alternatives is certainly on the rise. The global plant-based market was estimated to be valued at \$10.3bn and is projected to reach \$15.6bn in five years, according to [this survey](#).

The rise of the flexitarian, where people eat mostly a vegetarian diet but occasionally meat, poultry and fish, is just what this new sector needs. These moments of 'indulgence' can be expanded with plant-based alternatives that do not compromise on taste, texture and overall experience. And it's not just about health benefits. Consumers generally understand the environmental impact of meat and dairy production.

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*Younger people in particular are more willing to switch to meat-free alternatives*

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That said, switching to a vegan or vegetarian diet is still a bridge too far for many. One of the hurdles is that for those wishing to adopt a more plant-based diet means giving up some of their favourite dishes which often contain meat, just think of that juicy burger just off the barbeque.

But in the US around a third of the population is said to be adopting a vegan, vegetarian, pescatarian or flexitarian diet while in Europe that number is about a quarter. But it's growing, according to the Food Industry Association and we notice that from a demographical point of view the consumers who are more open to a diet with less meat, are younger generations like Millennials and Gen Z.

**61%** of greenhouse gas produced by livestock is traced back to beef

## Industry disruptors challenging the traditional players

With this demand, we're seeing a range of start-ups who are now acting as industry disrupters. Good examples are Beyond Meat, Impossible Foods, The Vegetarian Butcher and Oatly. For them, it's about profit, of course, but also about sustainability.

The biggest difference with typical vegan or vegetarian brands is that these types of companies deliberately target the meat and dairy consumer, who in fact are (potential) flexitarians. Their success has not gone unnoticed amongst traditional players in the industry. The total revenue from plant-based eggs and dairy alternatives for animal proteins is expected to reach US\$290bn by 2035 which represents 11% of the total animal protein market.

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Several traditional companies in the meat and dairy sector have taken steps to protect their shelf space and retain the 'share of wallet' of consumers. A recent example is Brazilian based JBS, one of the largest global meat producers, that acquired Dutch-based Viverra, a plant-based meat producer. The rationale behind the transaction was to further reinforce its meatless products' presence. In 2018 Unilever acquired The Vegetarian Butcher and in 2017 Danone acquired Whitewave, a plant-based dairy producer based in the US. In the end, both the disruptor and the traditional player are fighting for the attention of the same consumer and the battle eventually takes place in the supermarket on the shelves.

We've written extensively about the growth of meat and dairy alternatives. Find out more about how they're stirring up the European food industry by reading our report [here](#).