



## Consumer Insights >> meat substitutes

Q2 2025 - The role of price

# In this update:

- The **impact of price on consumer decision-making** around meat substitutes.
- Market developments regarding price.
- Price take-aways for stakeholders in the market.



# What do Dutch people consider when buying a meat substitute?



The Netherlands is known for its progressiveness in the field of meat substitutes. Per capita, the Dutch consume the most meat substitutes in Europe.

[Many retailers have set ambitious goals to sell more plant-based products.](#)

However, the retail market for meat substitutes has not grown further recently.

# High price main reason not to buy

Top 15 reasons not to buy a meat substitute (%)



Source: **Markteffect**  
Research is Everything

**schouten**

Q2 2025 - The role of price

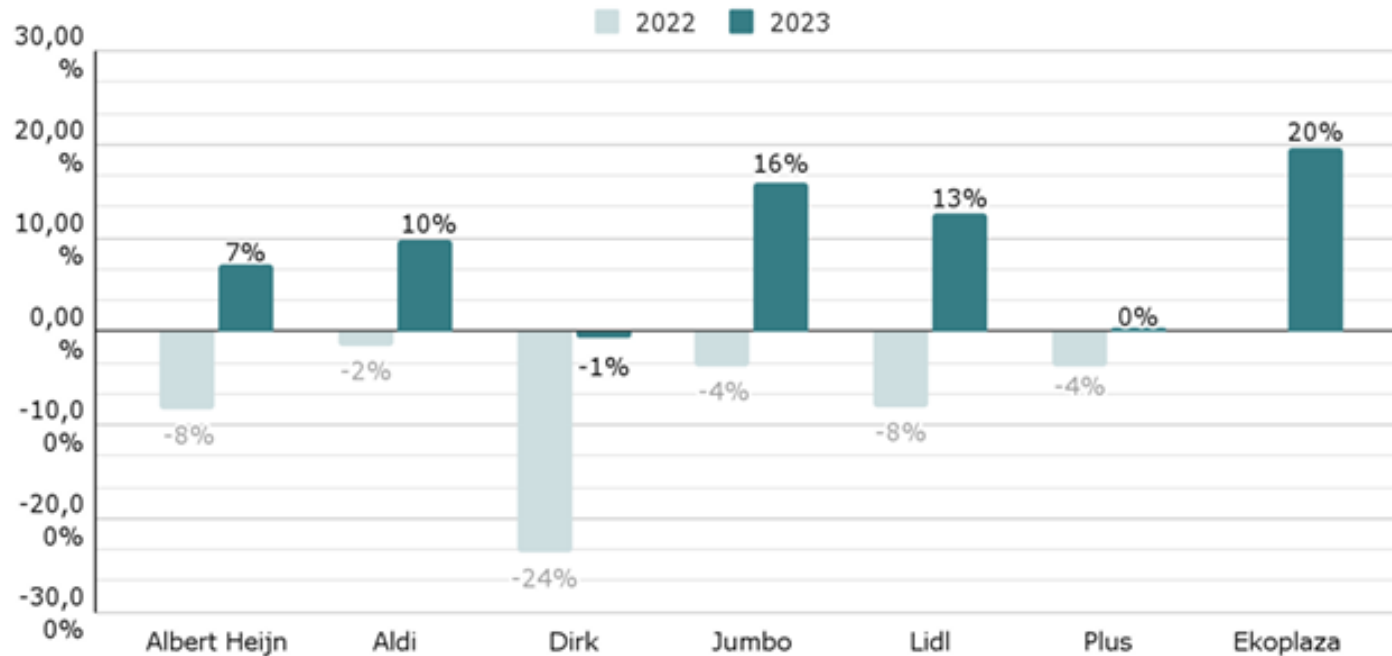


[Source](#)

## That meat substitutes are expensive is partly still a matter of perception

### Plant-based groceries in 2023 often cheaper than animal-based groceries – Dutch retail

How much cheaper (%) is it if you shop plant-based?



Read as: where at Jumbo in 2022 animal-based was still 4% cheaper than plant-based (including meat substitutes), in 2023 plant-based was 16% cheaper than animal-based. A shift also occurred at AH, ALDI, JUMBO, Lidl and PLUS.

"Consumers also seem to use the price or price perception of meat substitutes **as an excuse** not to buy / not to eat / not to have to change"



# In recent years, prices have come closer to meat

## Retailers do lower prices for meat substitutes

Private Label

### Jumbo Lowers Prices Of Own-Brand Meat Substitutes

November 22, 2023 5:50 AM  
By Dayeeta Das

**JUMBO**



[Source](#)



## LEADING GERMAN SUPERMARKETS PRICE MATCH PLANT-BASED FOODS WITH MEAT COUNTERPARTS

With major German retailers like Lidl, Kaufland and Aldi adjusting their pricing to promote plant-based foods, how will this shape the industry in the coming years?

[Source](#)

## Yet Another EU Retailer Drops Vegan Prices as BILLA Makes "Plant-Based Possible for Everyone"

November 9, 2023

[Source](#)



### Gleichberechtigung auf dem Teller: Lidl Österreich senkt Preise für vegane Produkte radikal

Pflanzliche Alternativen gleich günstig wie tierische Vergleichsprodukte: Bis zu 52 % Preisnachlass; Anteil an pflanzlichen Proteinquellen wird bis 2023 um 20 % ausgebaut

29.01.2024 | Salzburg, Österreich

[Source](#)



# Action was also taken in Out of Home

*Examples are Burger King and IKEA*

## Plant-Based for Everyone: Burger King Germany Makes All Vegan Products Cheaper than Meat

By Anay Mridul — Published on Mar 6, 2024 — Last updated Mar 6, 2024

ALT PROTEIN CONSUMER TRENDS & INSIGHTS VEGAN



[Source](#)

## Food Service

## IKEA Brings Famous Plant Dog to USA, Priced Less Than Meat Hot Dog at Just 70 Cents

March 19, 2024



© IKEA

[Source](#)

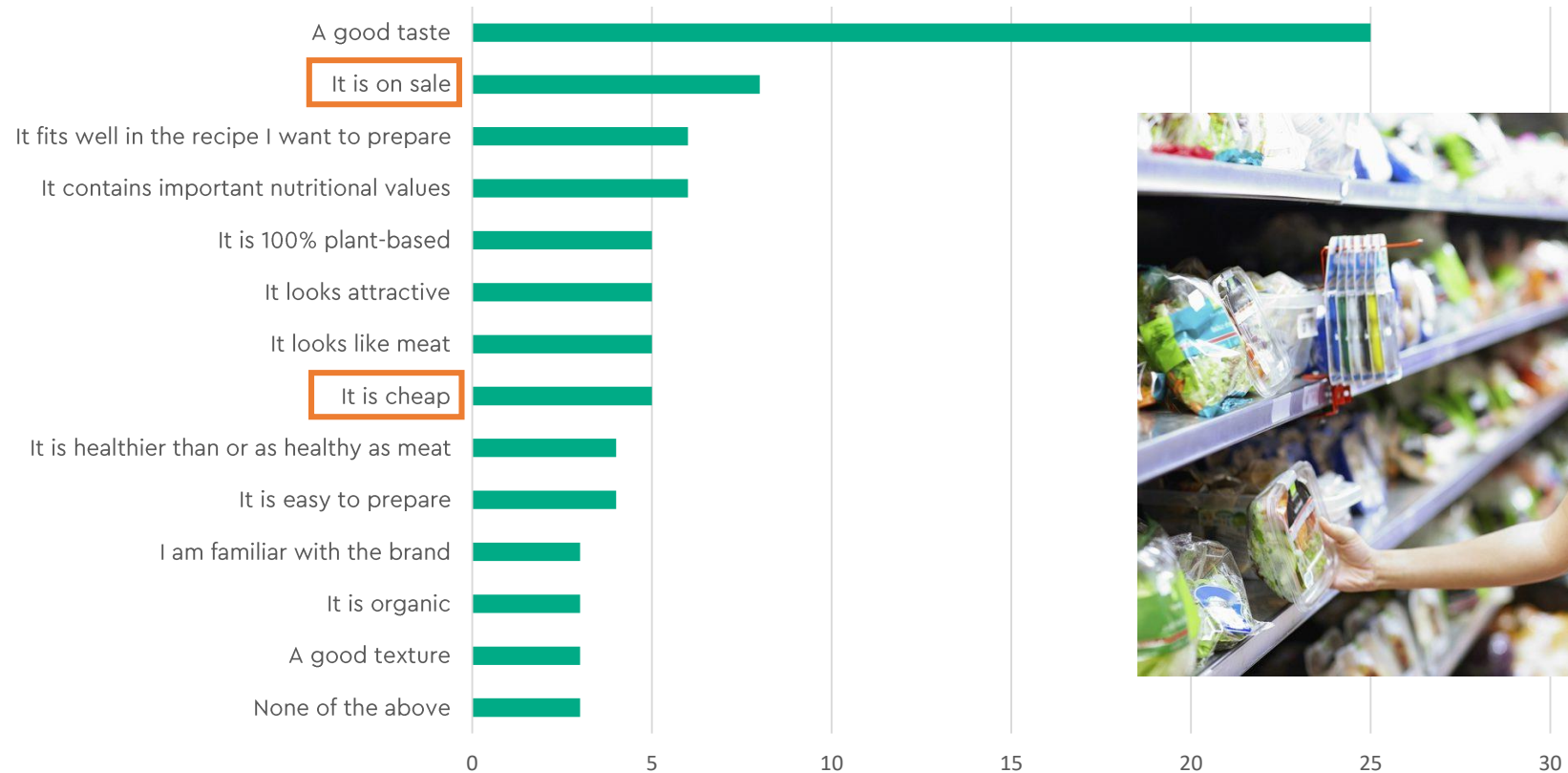






# Offer or low price helps to buy

Decisive reason to buy meat substitute



# During promotion, many meat substitutes are sold

- Consumers are **more likely to buy** meat substitutes when they are on sale.
- Promotions such as "1+1 free" or 25% discount make it **attractive to try** out new products or stock up.
- Especially during campaigns such as Veganuary, there are often higher discounts, which **stimulates sales**.









# 'Prices of meat substitutes must be clearly lower than those of meat'

*According to research in America*

- Meat substitutes only become really popular when they are cheaper than meat, not when they are just as expensive.
- If a meat substitute costs half as much as meat, the number of people who choose it doubles.
- In this study, price weighs more heavily than taste or texture when choosing between meat and meat substitutes.
- Men switch to meat substitutes more quickly when the price is significantly lower.
- Mass production and government support can make meat substitutes permanently cheaper.







**It is therefore clear that the relatively high price of meat substitutes has formed an obstacle to buying them. In recent years, this obstacle has been increasingly removed.**

**However, the price difference between meat and meat substitutes is often not yet seen as such or is not yet considered sufficient.**

# What can producers do?

*Without compromising on taste, texture, sustainability and nutritional values, they face a challenge.*

According to [this study](#), producers can at least achieve price parity by:

- simplifying ingredients.
- encouraging local cultivation.
- making better use of residual flows.
- making production processes more efficient.
- scaling up and retail initiatives are crucial to further reduce costs and enable broad consumer acceptance.





# Meat prices are currently rising sharply

*This ensures price advantages of meat substitutes compared to meat and makes it more attractive for consumers to choose a meat substitute.*

## Inflation rising on high prices of food like meat and eggs

By Sarah Mulholland · Feb. 12, 2025, 2:14 pm



Hart Van Denburg/CPR News

Beef in a Boulder grocery store.









# Price-take-aways <sup>1/2</sup>

- ✓ **Price** plays **a very important role** in the selection process for meat substitutes.
- ✓ A **high price** is an **important obstacle** to not buying meat substitutes.
- ✓ **Price (perception)** can also be used as an **excuse** not to buy meat substitutes.
- ✓ Suppliers are **increasingly realizing** that meat substitutes should be offered below the price level of meat.





## Price-take-aways 2/2

- ✓ It helps that **meat prices** are currently **rising**.
- ✓ **The greater the price difference** compared to meat, the greater the chance that the consumer will choose the meat substitute.
- ✓ **Producers are working specifically on cheaper products without making concessions** on taste and texture.
- ✓ **Scaling up and initiatives** by governments, retailers and food service parties are **crucial to increase consumer acceptance**.



Our *next Consumer insights* >> Meat Substitutes will be about *the role of ingredients and nutritional values*. Don't miss out!



Questions? Please feel free to contact me

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