smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

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

- Austria
- Belgium
- Denmark
- France
- Germany
- Italy
- The Netherlands
- Poland
- Romania
- Spain
- United Kingdom

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.

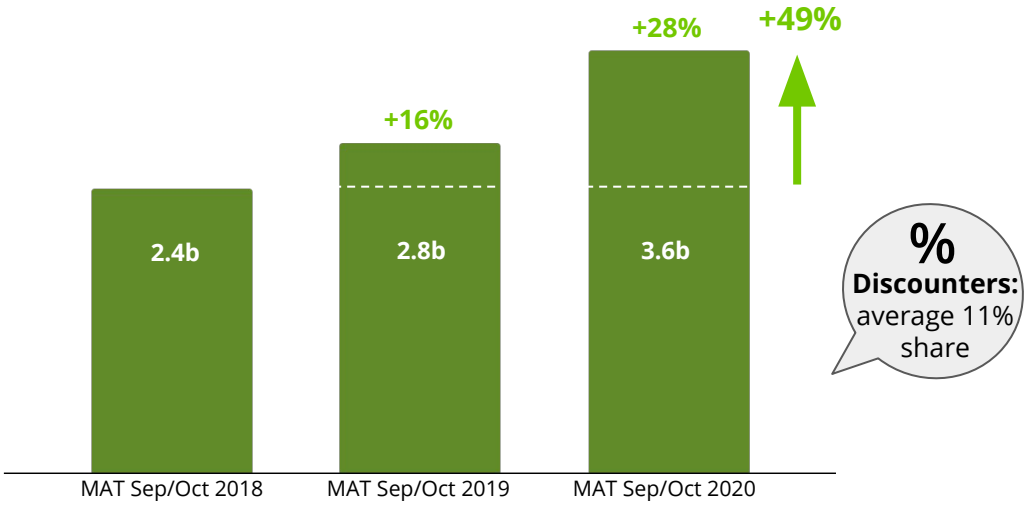
Varies according to availability in each country. Not all categories are currently available in all countries.

Due to rounding, numbers presented throughout this document may not add up precisely to the totals provided and percentages may not precisely reflect the absolute figures. Single digit numbers are rounded to one decimal place. Double digit numbers are rounded to whole numbers. All calculations are based on the underlying unrounded numbers.

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)+GER (PB meat, milk, yoghurt, cheese, ice cream, fish)+IT (PB meat, milk, yoghurt, cheese, ice cream)+NL (PB meat, milk, yoghurt, cheese)+PO (PB milk)+RO (PB meat, milk)+SP (PB meat, milk, yoghurt)+UK (PB meat, milk, yoghurt, cheese, bakery), sales value in €, MAT Sep/Oct (between CW39 and CW42 depending on country) 2018 vs. 2020; plant-based meat includes vegan and vegetarian products in all countries.

Source: Nielsen MarketTrack

MAT=Moving Annual Total

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Austria

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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’.

Source: Nielsen MarketTrack

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).

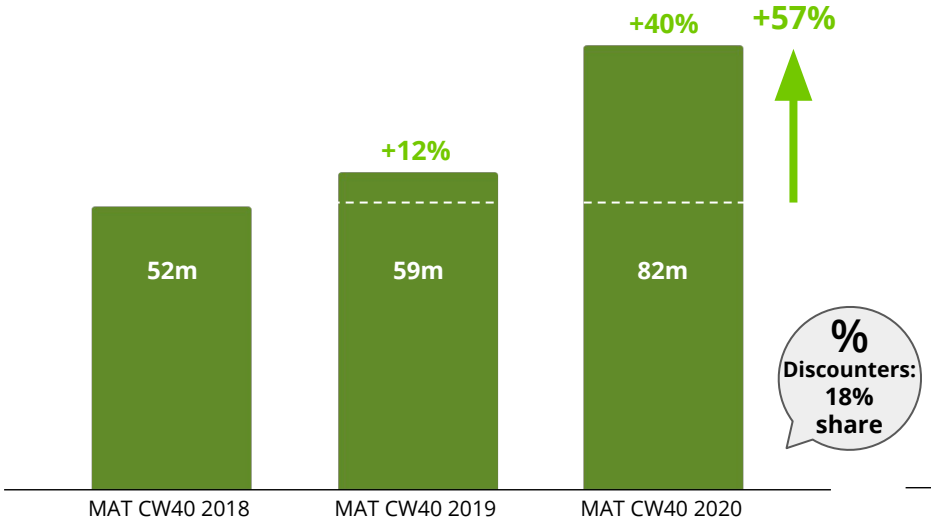
*Includes plant-based meat (vegan and vegetarian, no dairy-ingredients), plant-based milk, plant-based yoghurt; all numbers refer to MAT CW40 2020 if not stated otherwise

Source: Nielsen MarketTrack

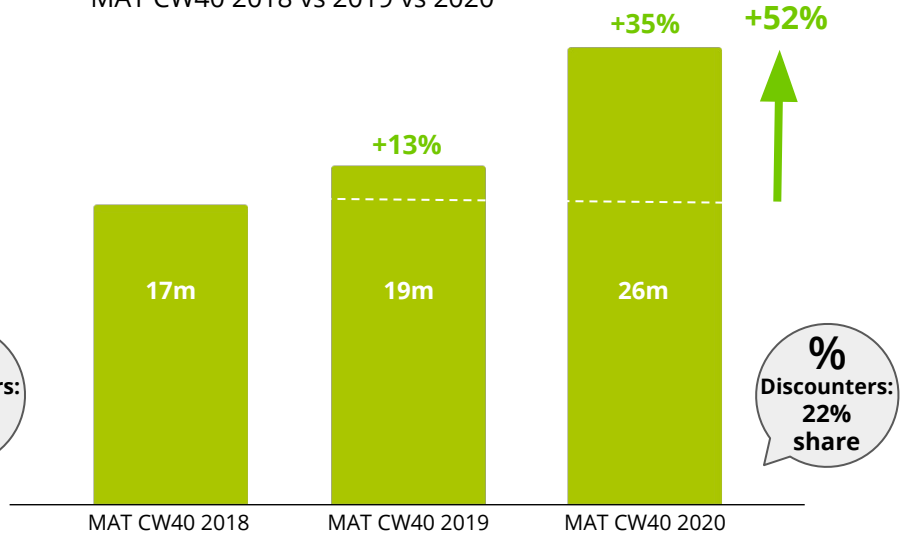
Plant-based sector overview: Austria
Total sales value and sales volume

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

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



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



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

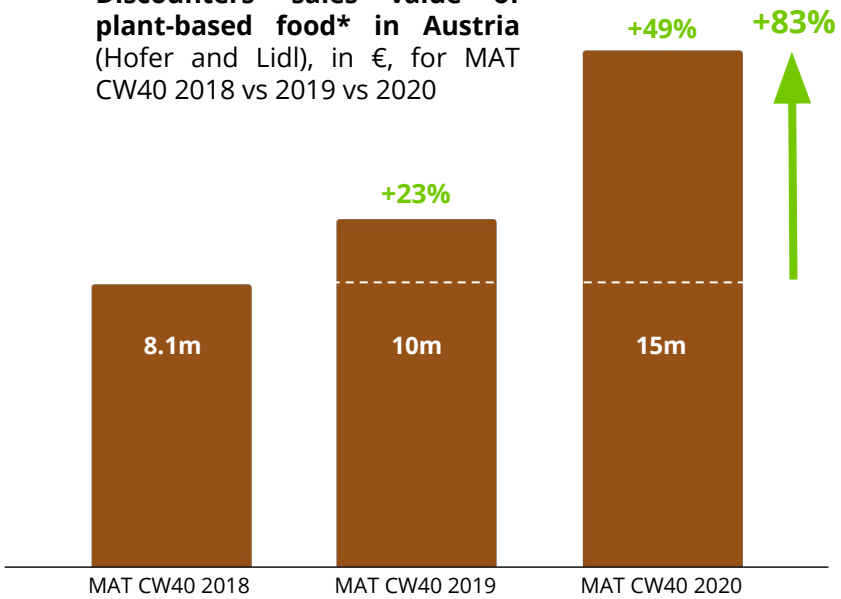
Source: Nielsen MarketTrack

MAT=Moving Annual Total

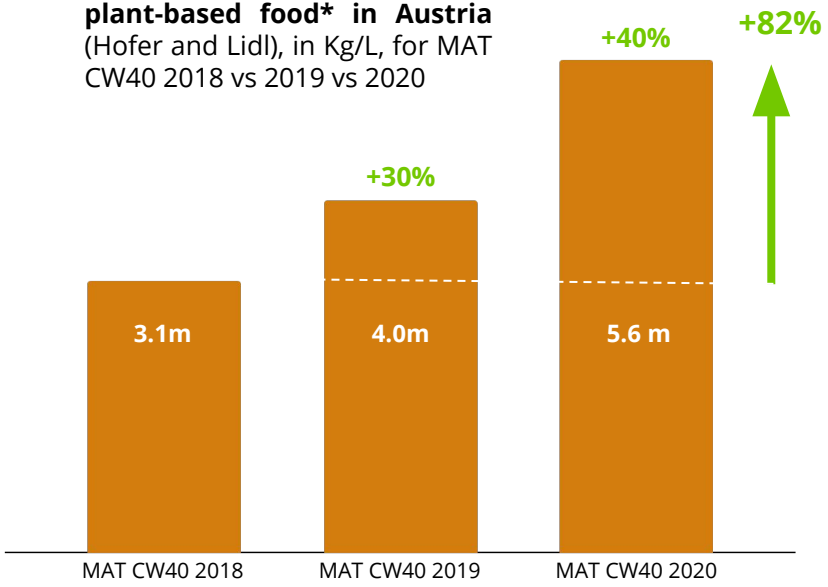
Plant-based sector overview: Austria
Discounters' sales value and sales volume

Discounters experienced even stronger growth over the past two periods.

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



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



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

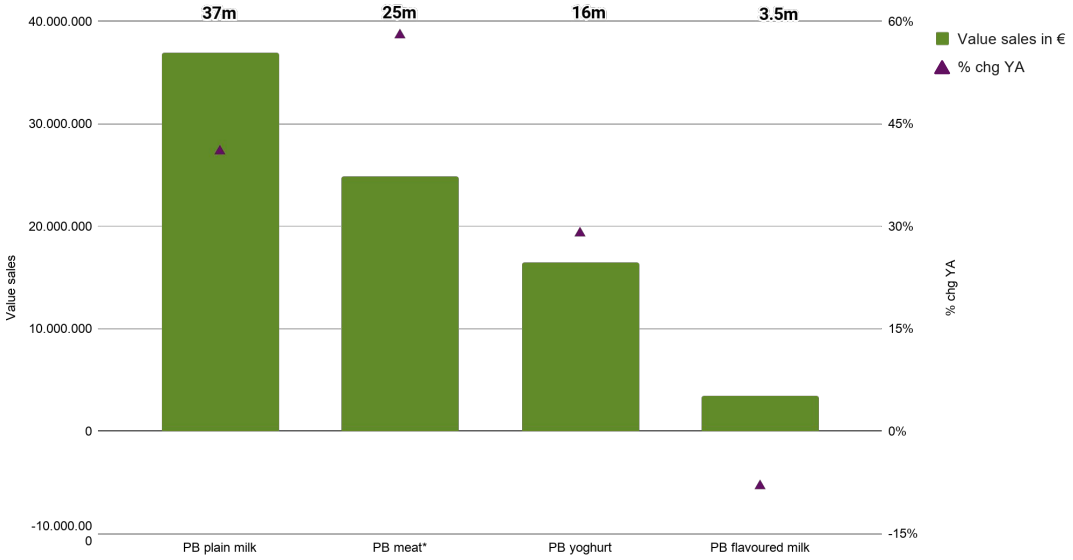
Source: Nielsen MarketTrack

MAT=Moving Annual Total

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

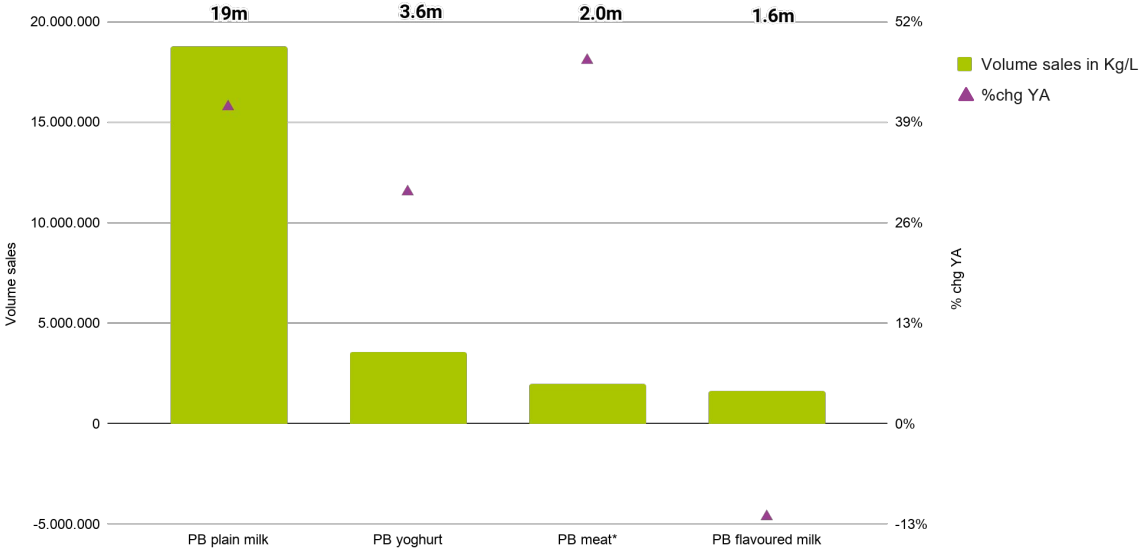
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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

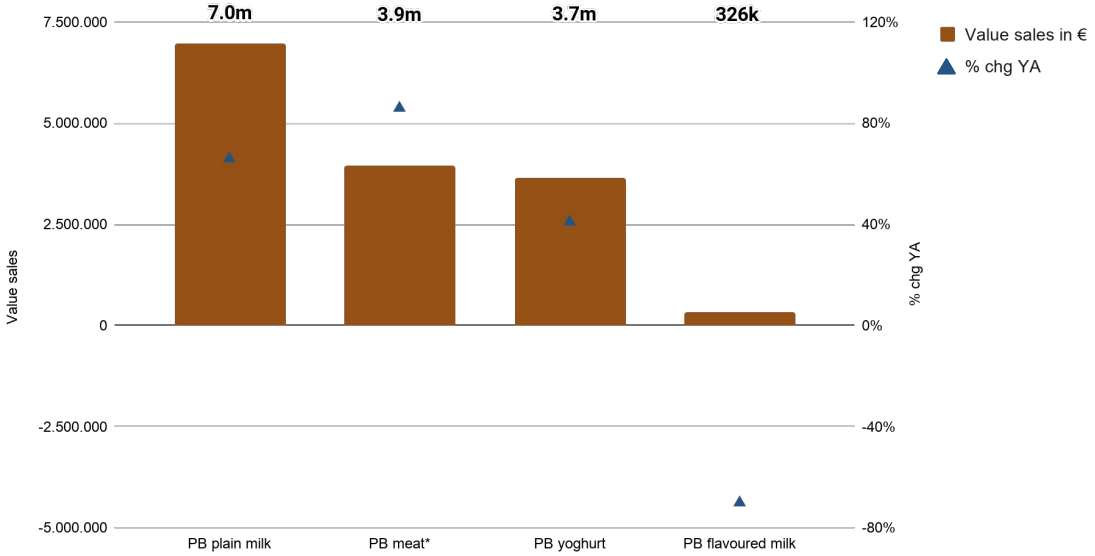
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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



*Vegan and vegetarian, no dairy-ingredients

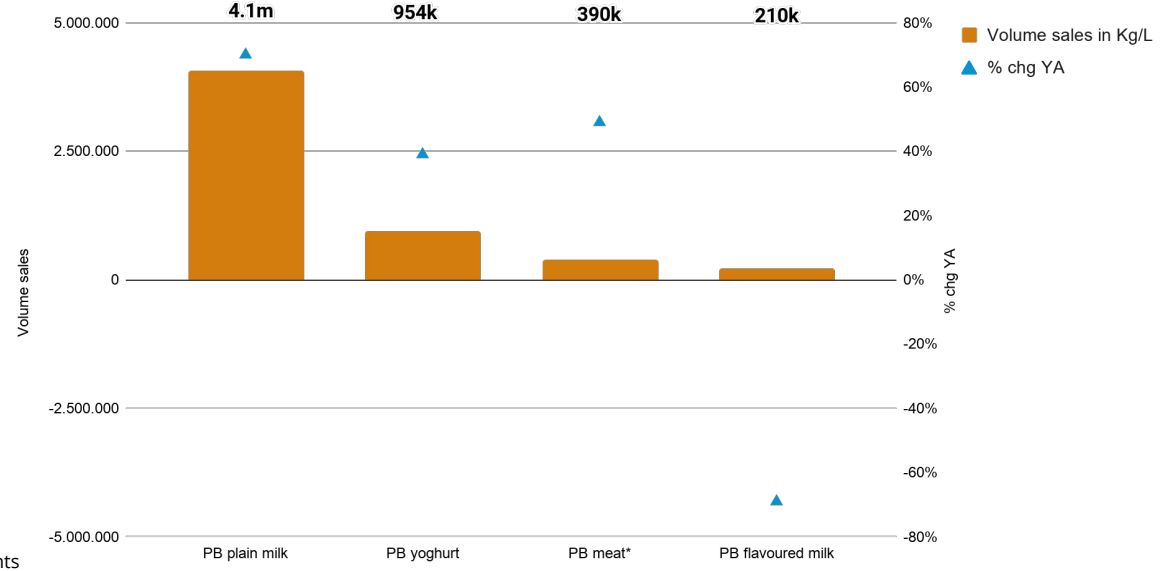
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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



*Vegan and vegetarian, no dairy-ingredients

Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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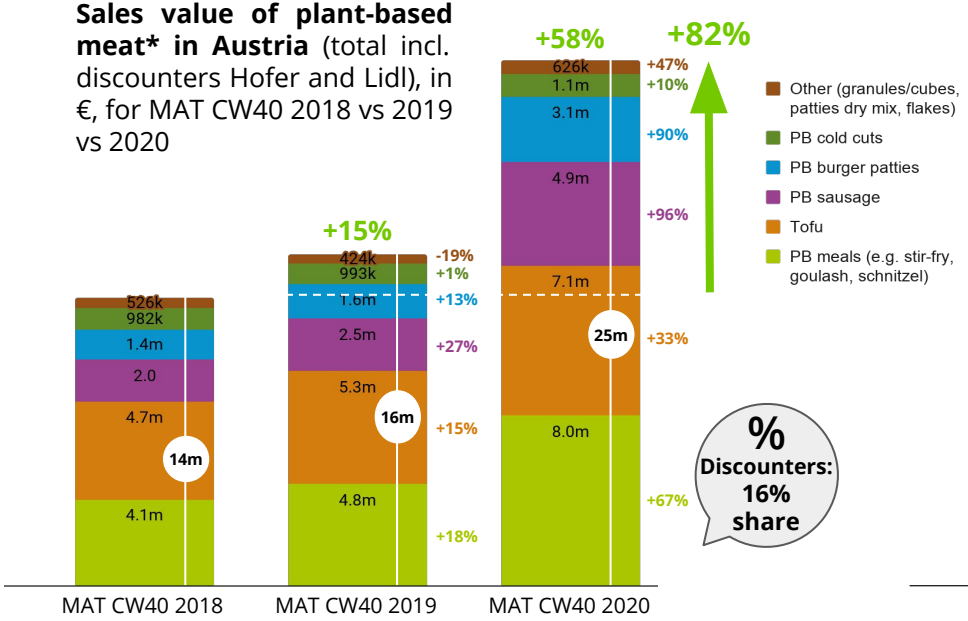
Plant-based sector deep dive: Austria

www.smartproteinproject.eu

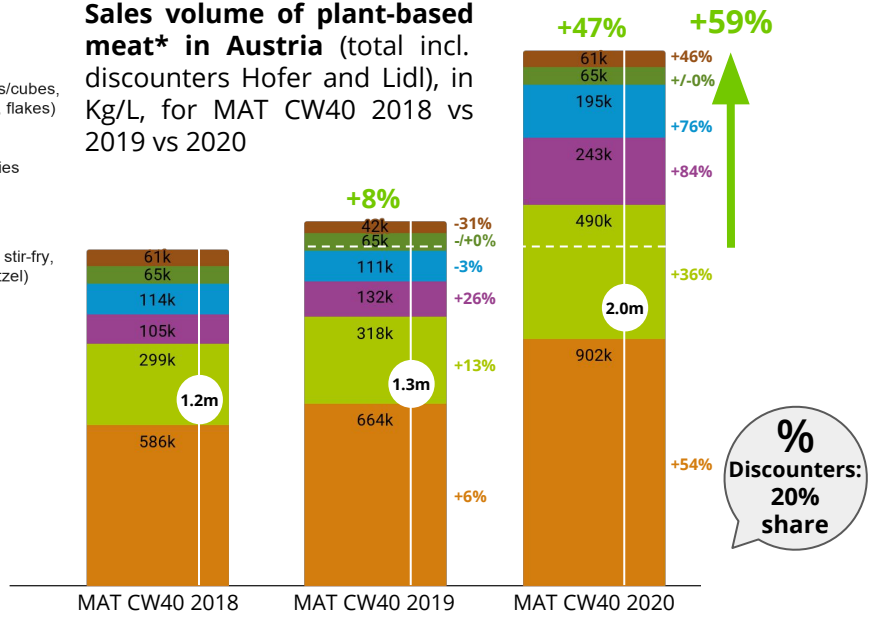
Plant-based sector deep dive: Austria
Total plant-based-meat sales

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

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



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



*Vegan and vegetarian, no dairy-ingredients

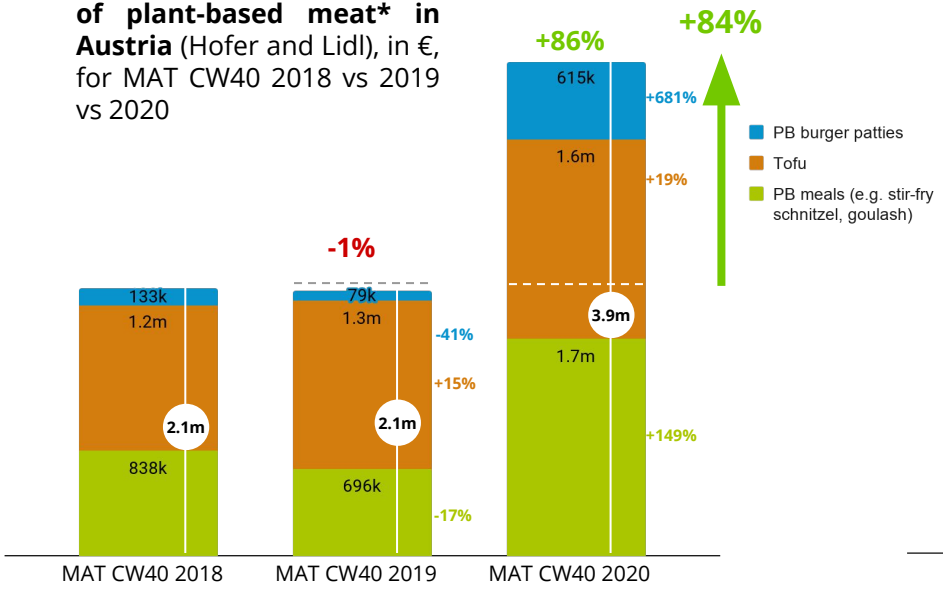
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

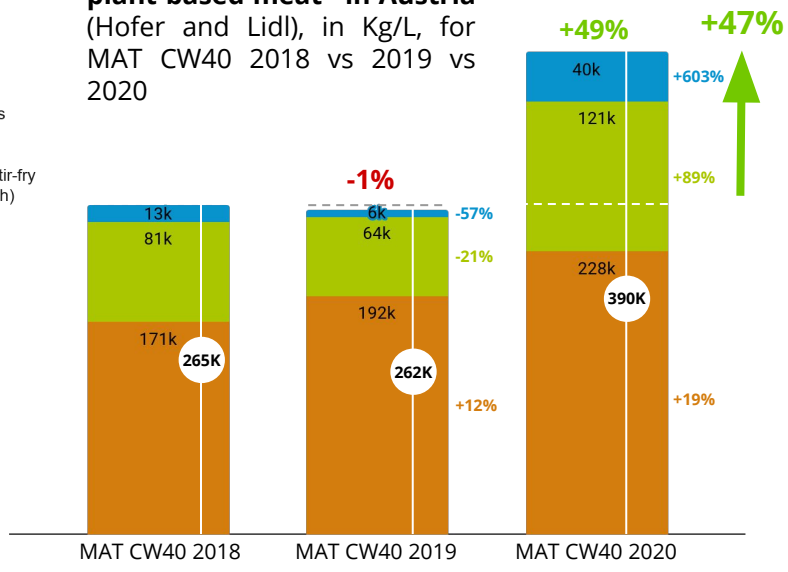
Plant-based sector deep dive: Austria
Discounters' plant-based-meat sales

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

Discounters' sales volume of plant-based meat* in Austria (Hofer and Lidl), in €, for MAT CW40 2018 vs 2019 vs 2020



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



*Vegan and vegetarian, no dairy-ingredients

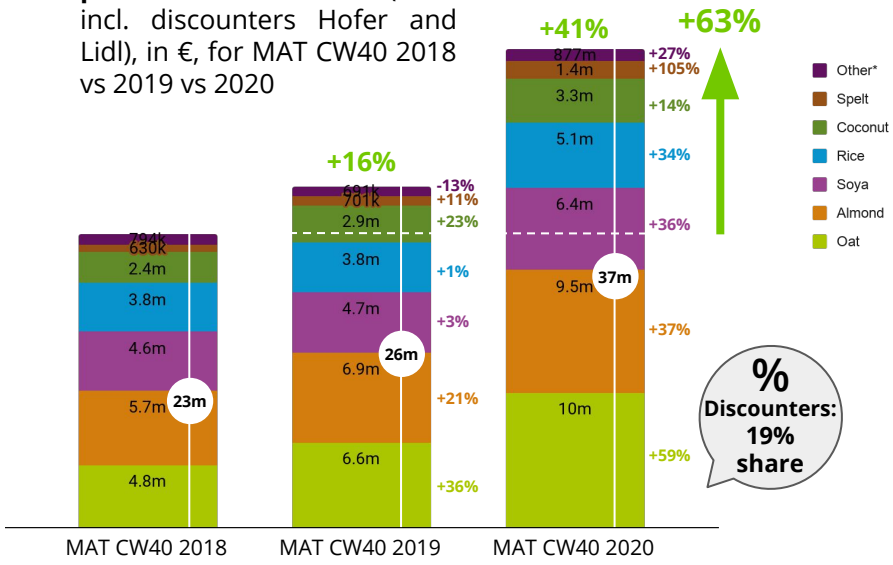
Source: Nielsen MarketTrack

MAT=Moving Annual Total

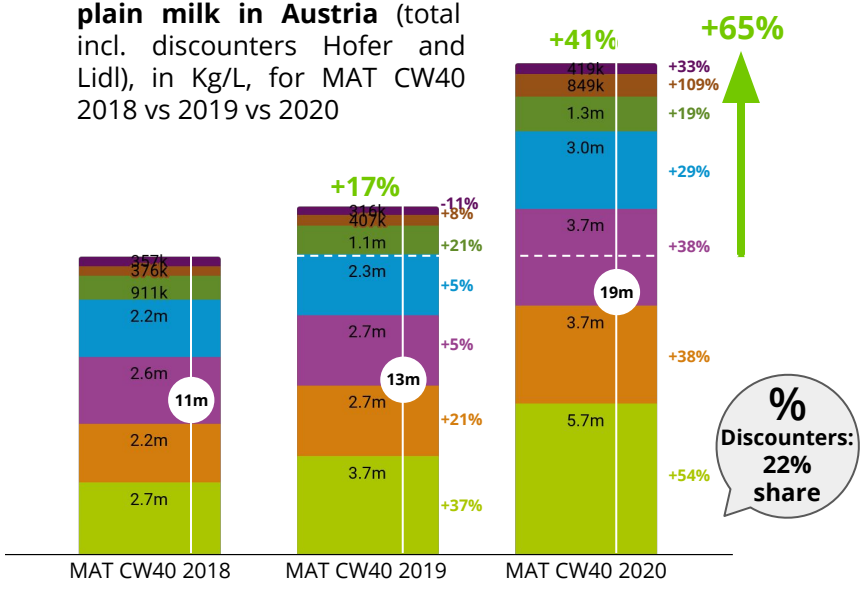
Plant-based sector deep dive: Austria
Total plant-based plain-milk sales

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

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



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



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

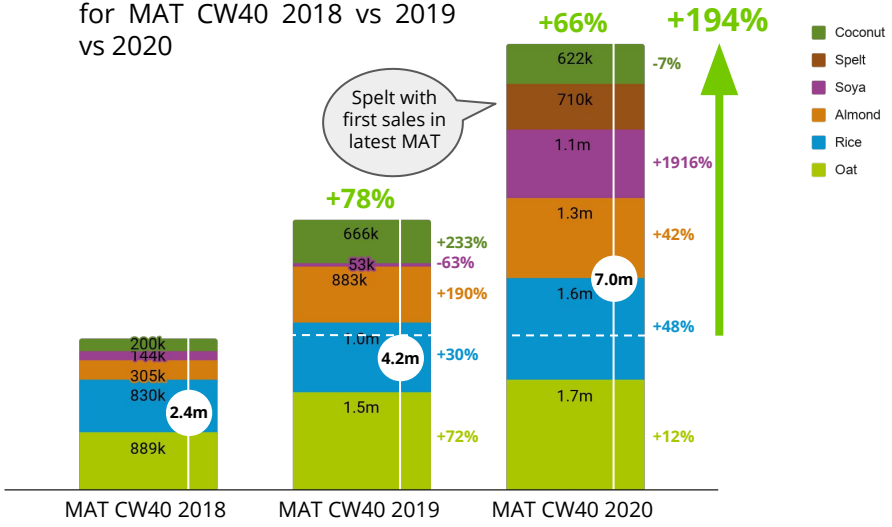
Source: Nielsen MarketTrack

MAT=Moving Annual Total

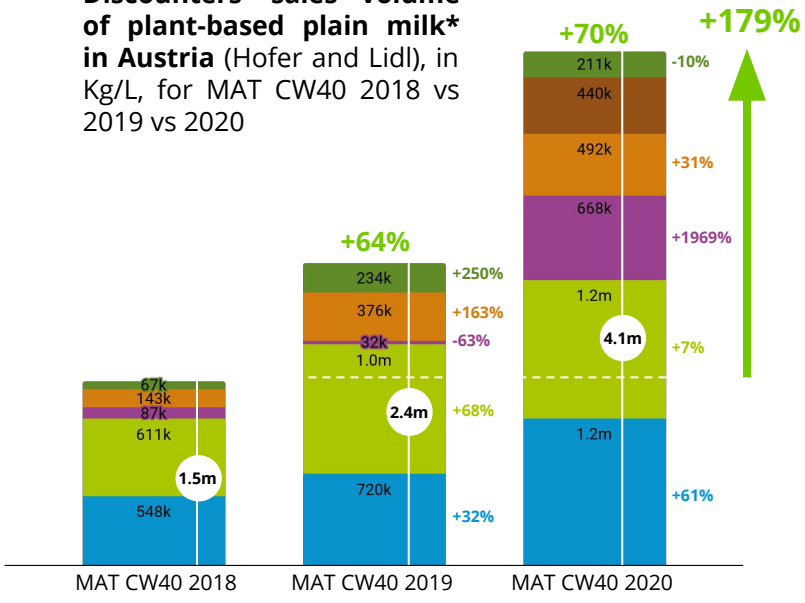
Plant-based sector deep dive: Austria
Discounters' plant-based plain-milk sales

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

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



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



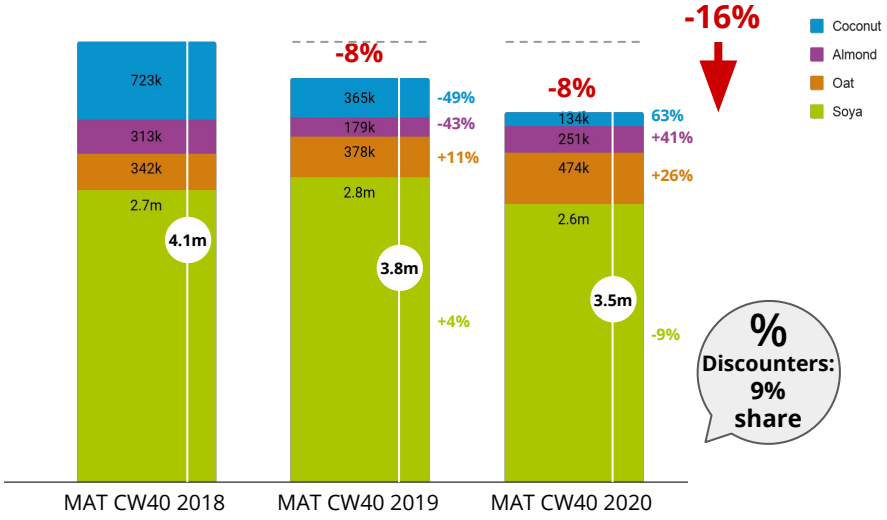
Source: Nielsen MarketTrack

MAT=Moving Annual Total

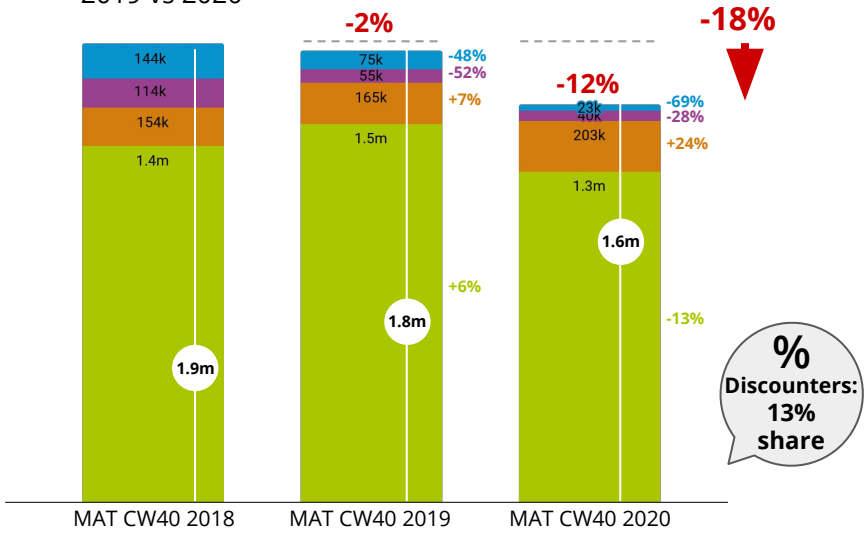
Plant-based sector deep dive: Austria
Total plant-based flavoured-milk sales

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



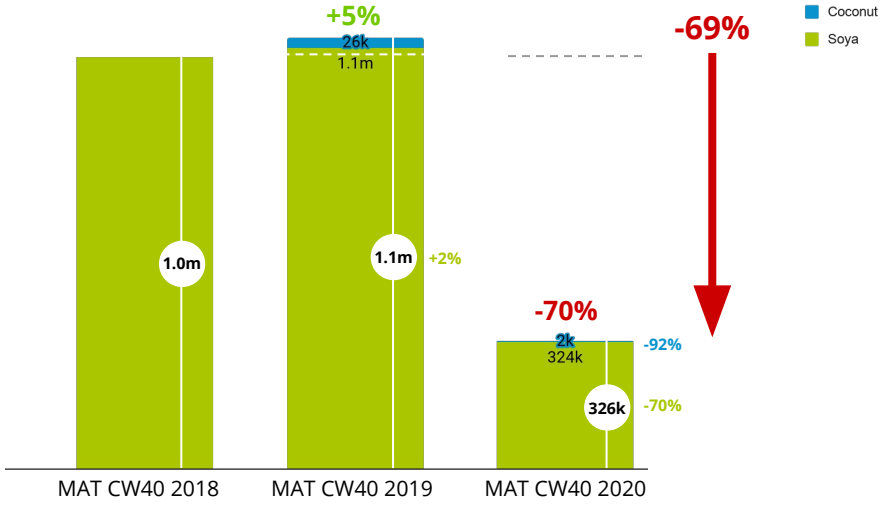
Source: Nielsen MarketTrack

MAT=Moving Annual Total

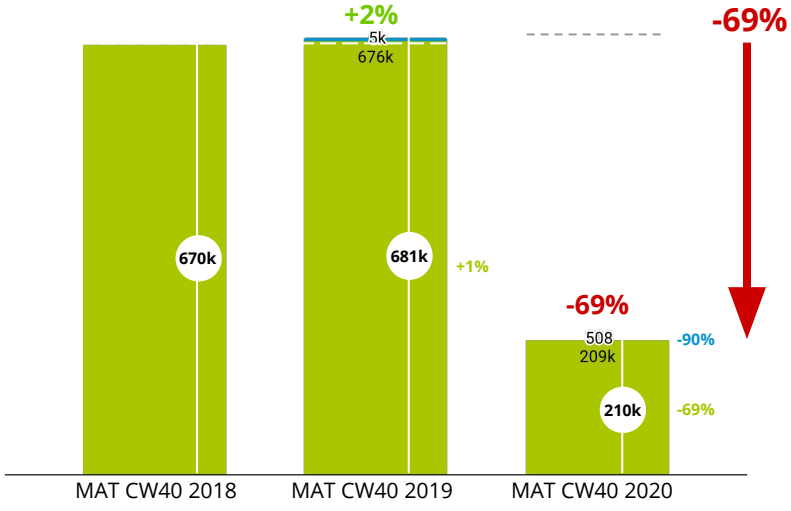
Plant-based sector deep dive: Austria
Discounters' PB flavoured-milk sales

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



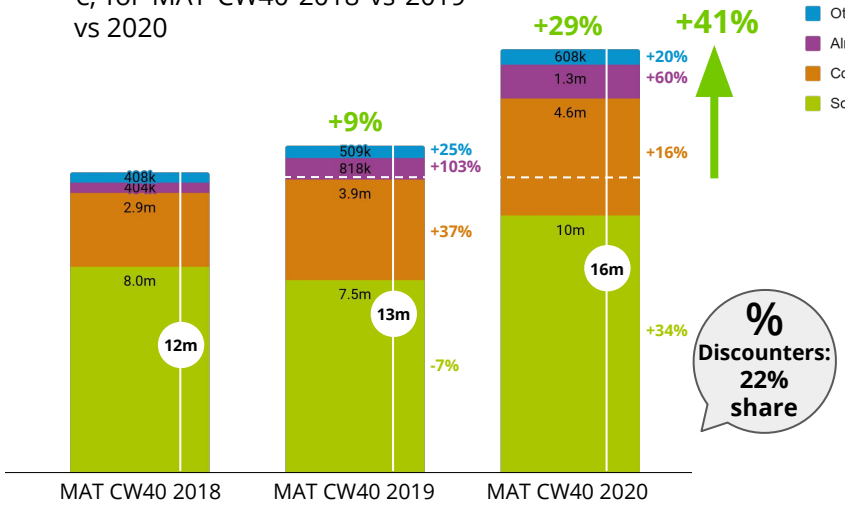
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

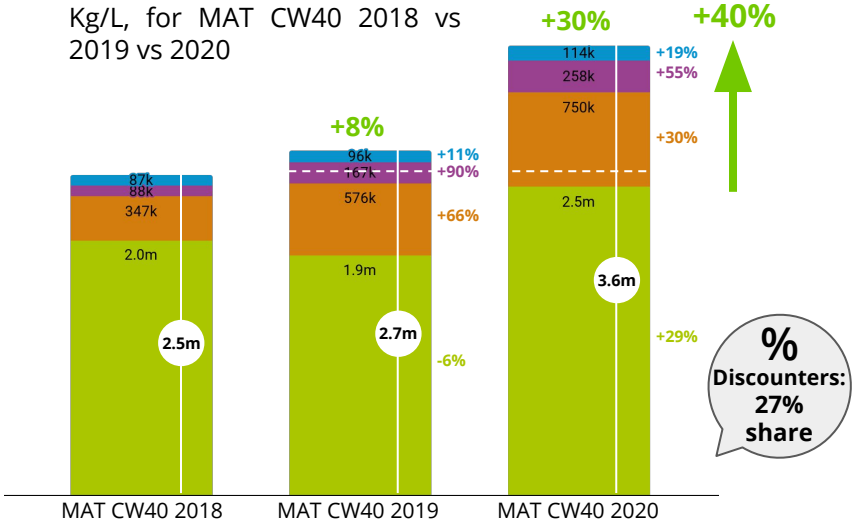
Plant-based sector deep dive: Austria
Total plant-based-yoghurt sales

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

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



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



*Other includes lLupine, cashew, oat

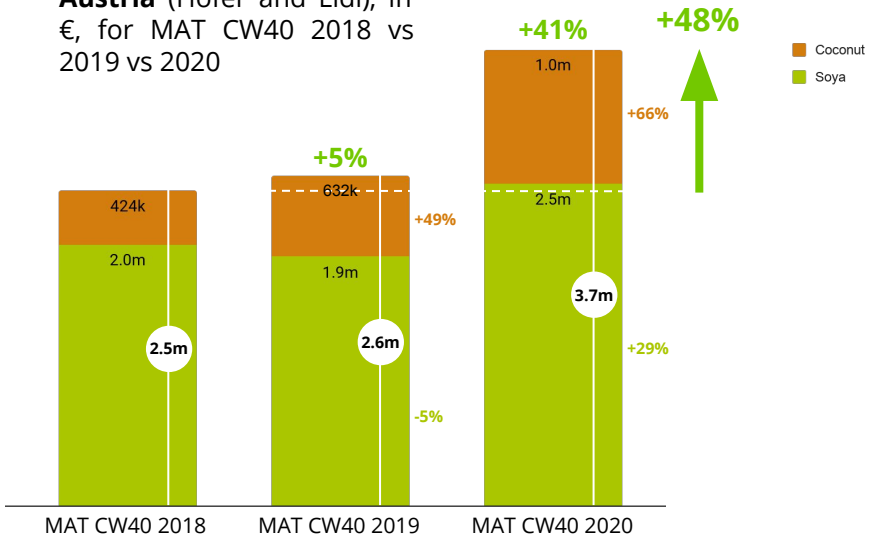
Source: Nielsen MarketTrack

MAT=Moving Annual Total

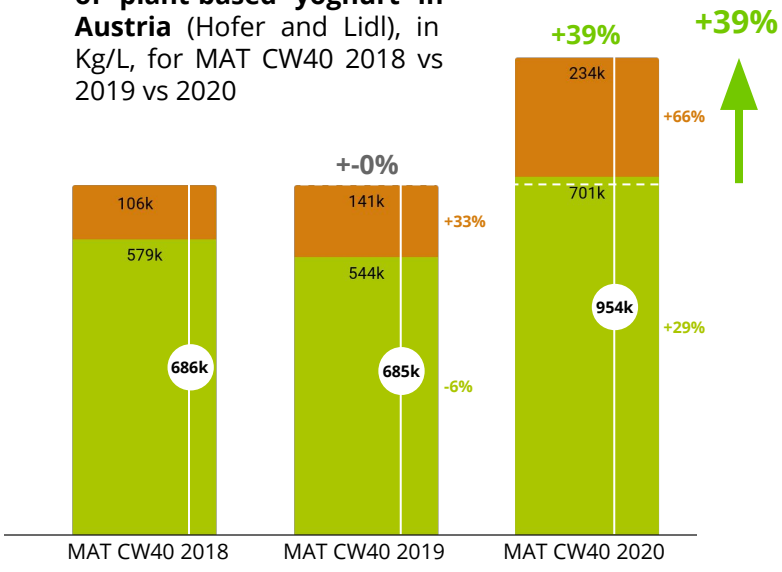
Plant-based sector deep dive: Austria
Discounters' plant-based-yoghurt sales

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

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



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



Source: Nielsen MarketTrack

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Belgium

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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”.

Source: Nielsen MarketTrack

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%).

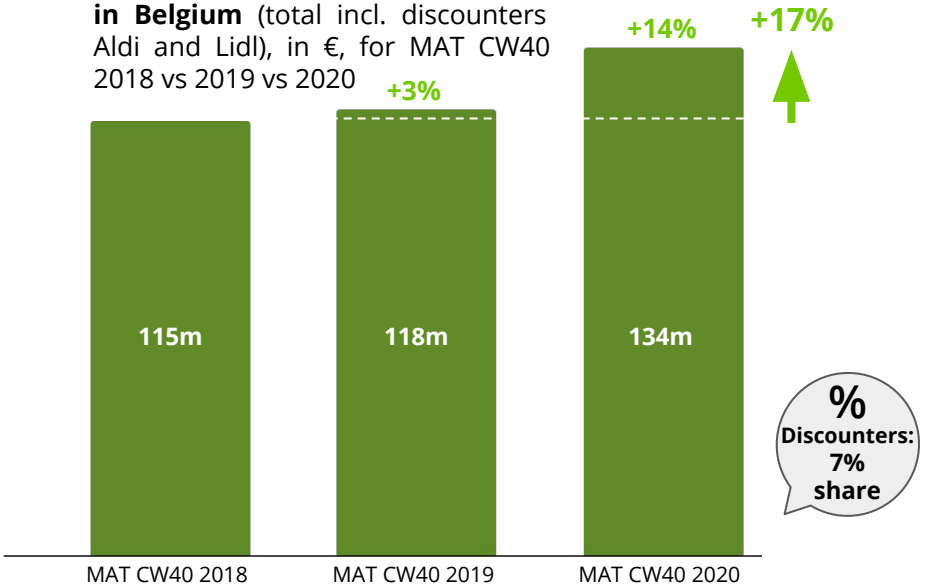
*Includes plant-based meat (vegan and vegetarian), plant-based milk, plant-based yoghurt; all numbers refer to MAT CW40 2020 if not stated otherwise

Source: Nielsen MarketTrack

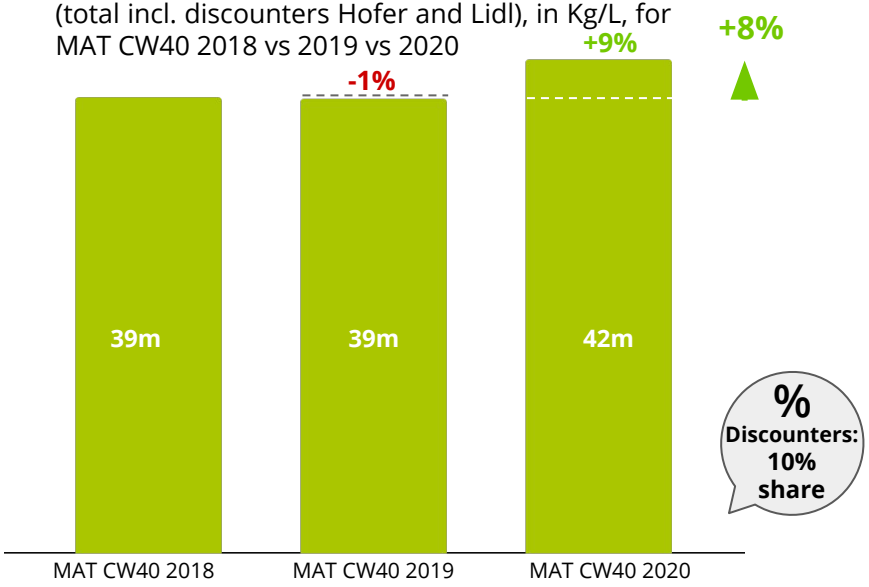
Plant-based sector overview: Belgium
Total sales value and sales volume

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

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



Sales volume of plant-based food* in Belgium (total incl. discounters Hofer and Lidl), 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

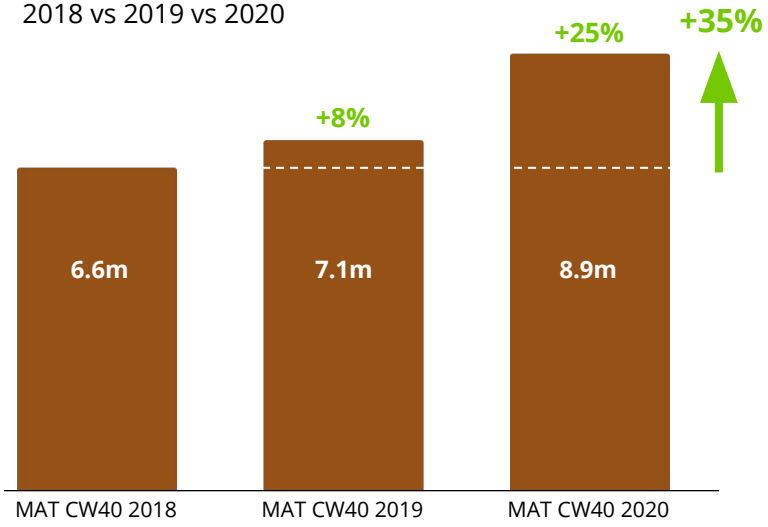
Source: Nielsen MarketTrack

MAT=Moving Annual Total

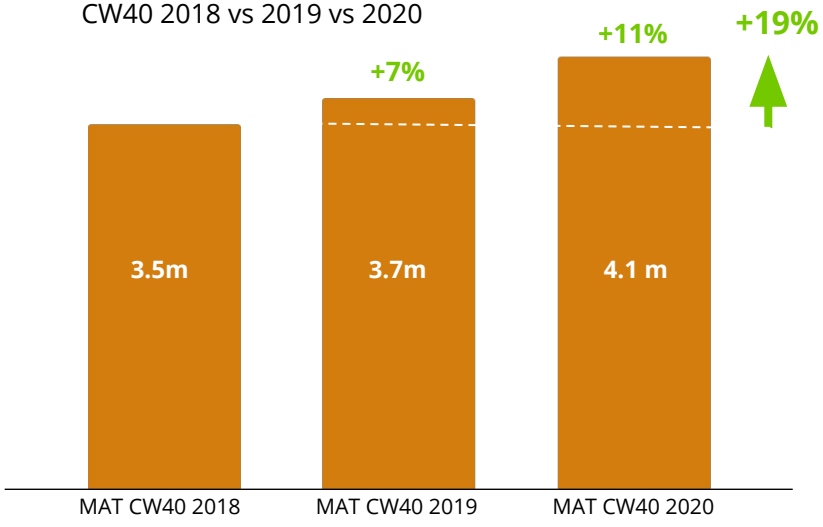
Plant-based sector overview: Belgium
Discounters' sales value and sales volume

Discounters experienced even stronger growth over the past two periods.

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



Discounters' sales volume of plant-based food* in Belgium (Aldi and Lidl), 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

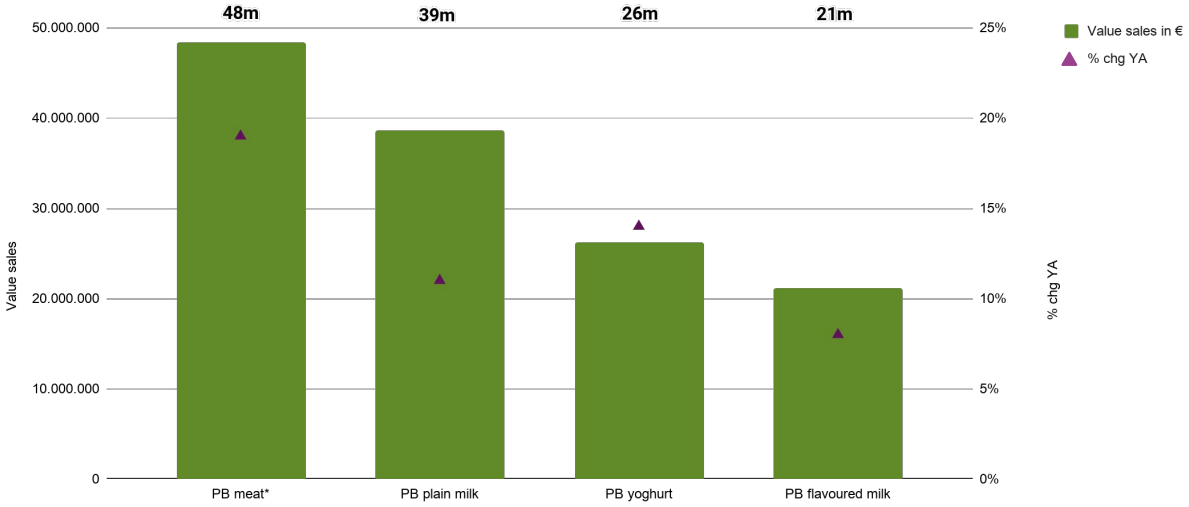
Source: Nielsen MarketTrack

MAT=Moving Annual Total

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



*Vegan and vegetarian

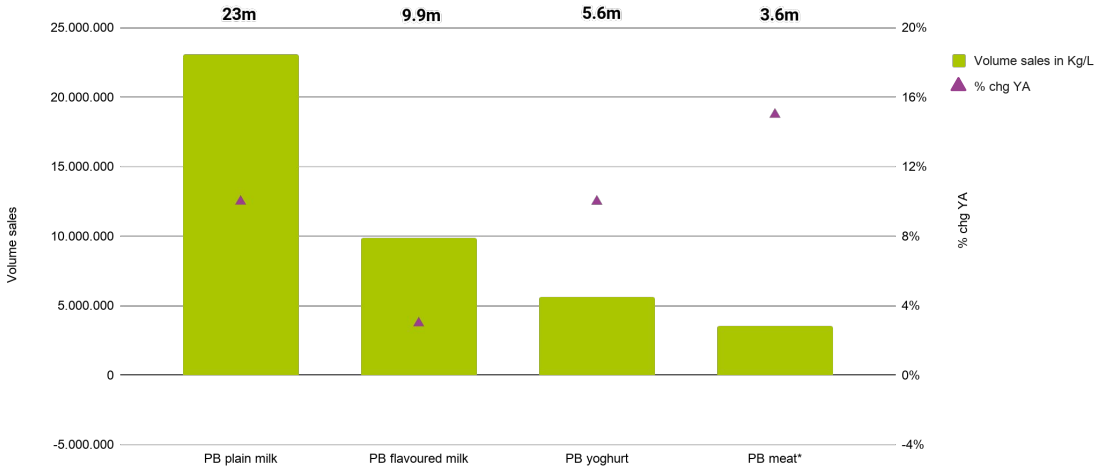
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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



*Vegan and vegetarian

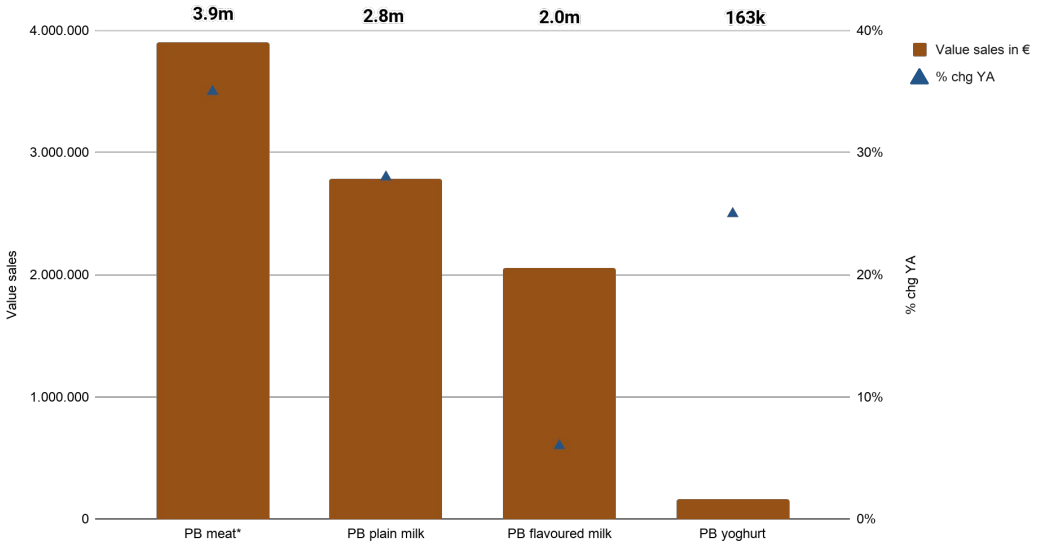
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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



*Vegan and vegetarian

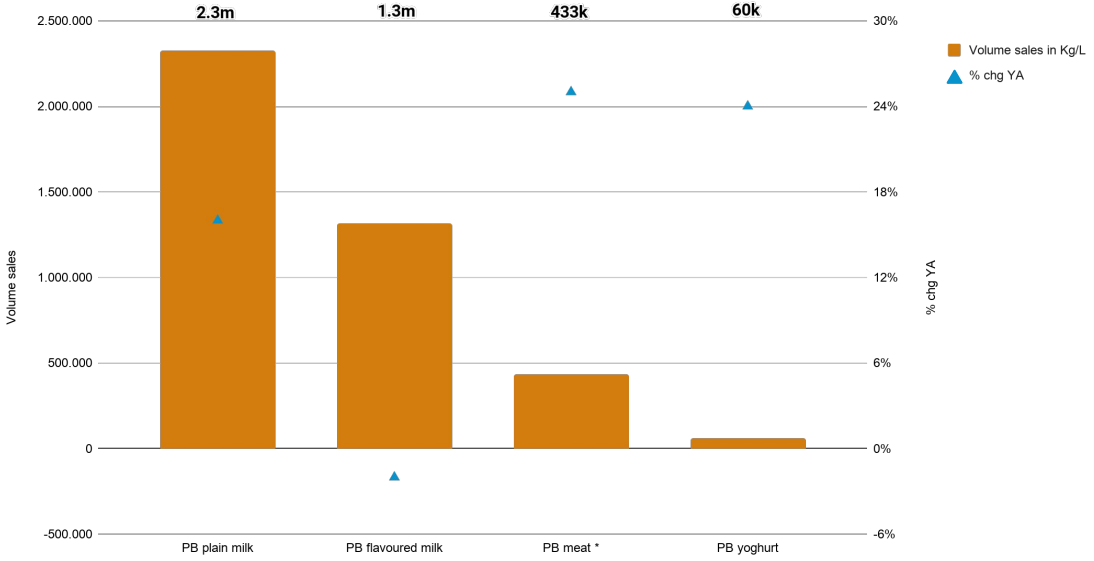
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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

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



*Vegan and vegetarian

Source: Nielsen MarketTrack

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smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

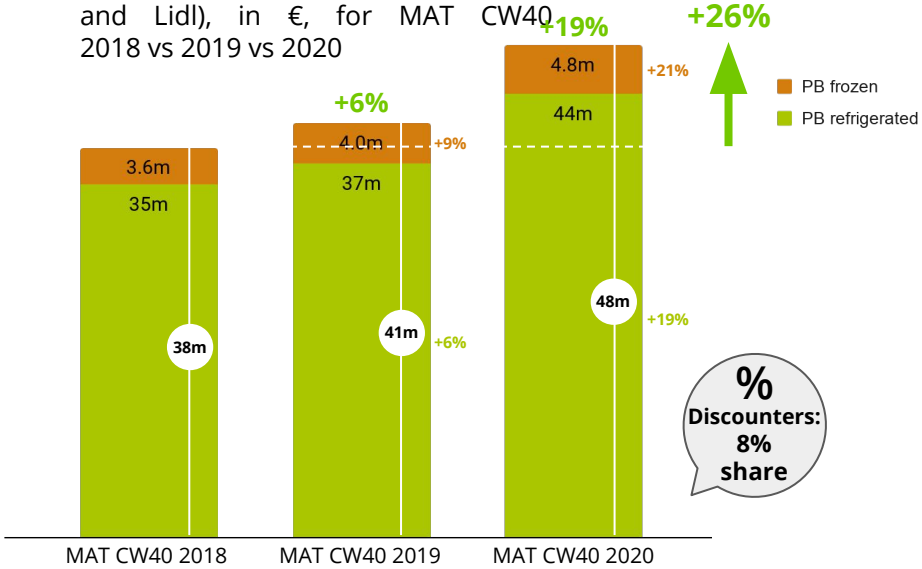
Plant-based sector deep dive: Belgium

www.smartproteinproject.eu

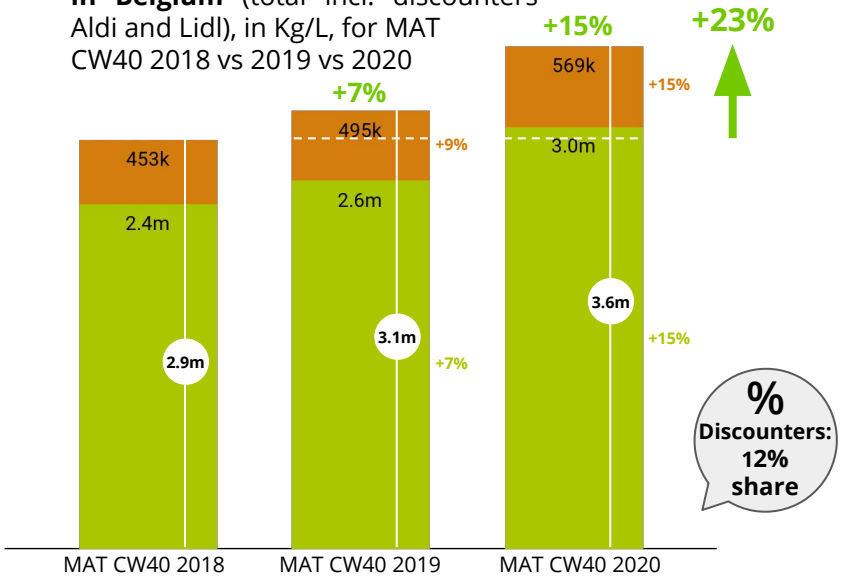
Plant-based sector deep dive: Belgium
Total plant-based-meat sales

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

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



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



*Vegan and vegetarian

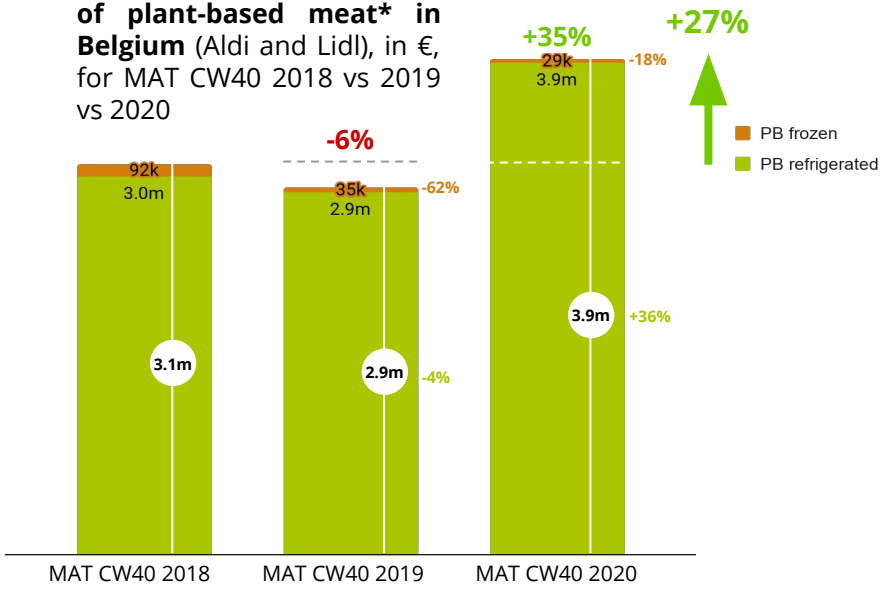
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

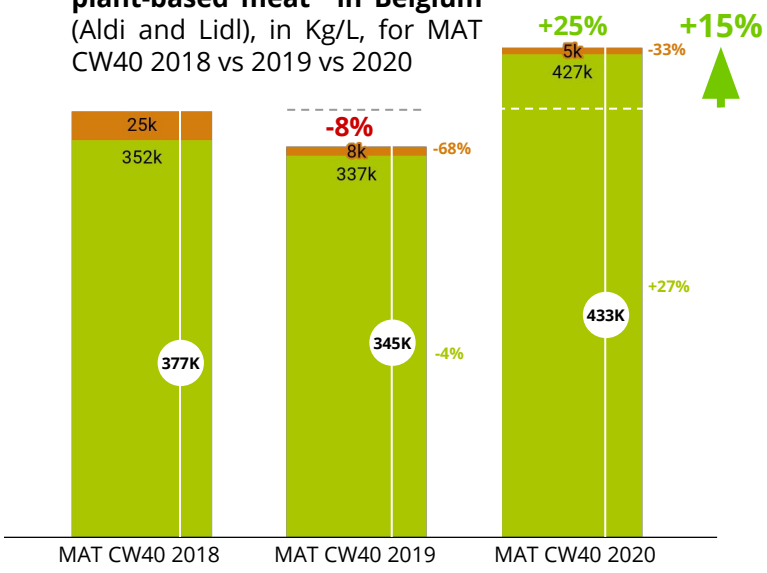
Plant-based sector deep dive: Belgium
Discounters' plant-based-meat sales

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

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



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



*Vegan and vegetarian

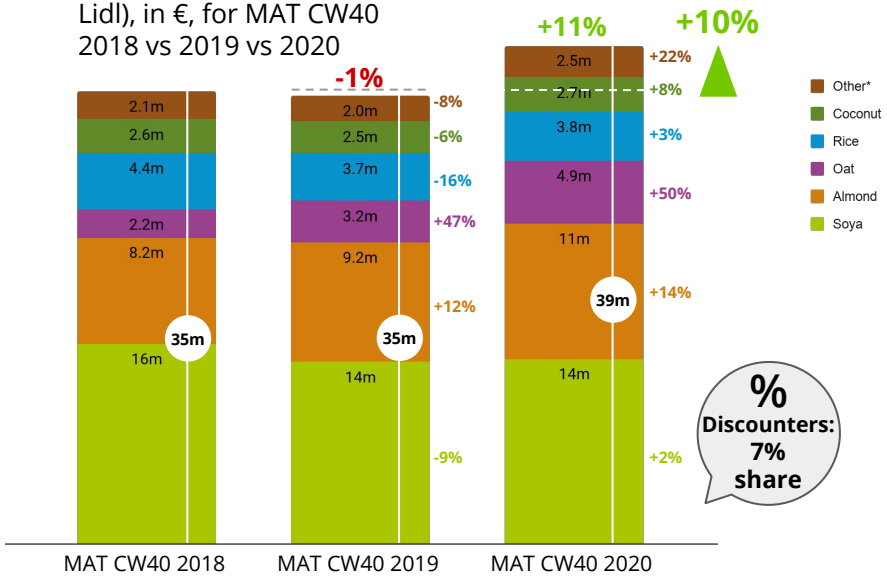
Source: Nielsen MarketTrack

MAT=Moving Annual Total

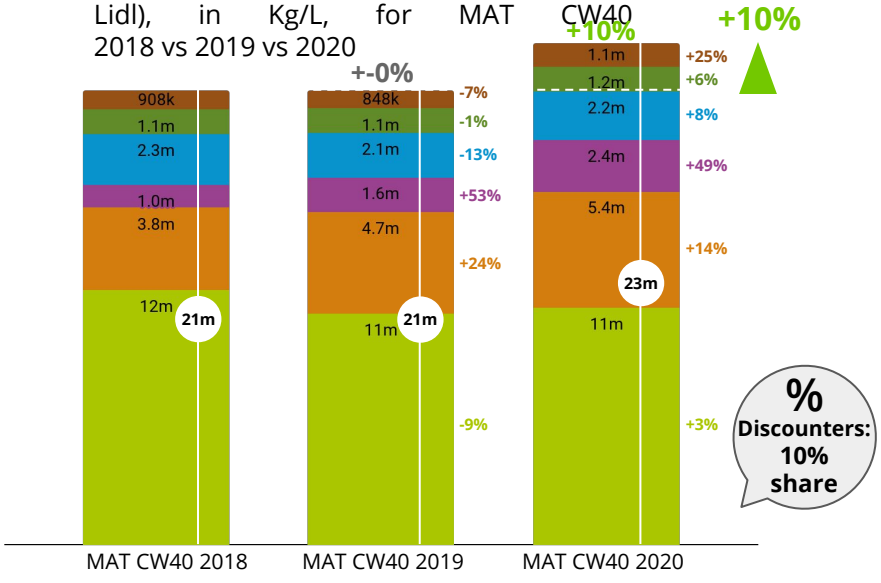
Plant-based sector deep dive: Belgium
Total plant-based plain-milk sales

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

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



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



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

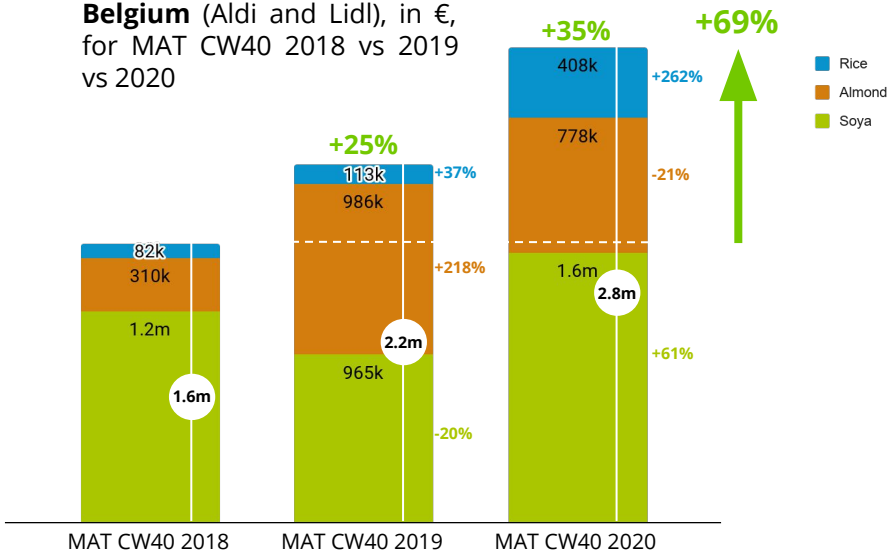
Source: Nielsen MarketTrack

MAT=Moving Annual Total

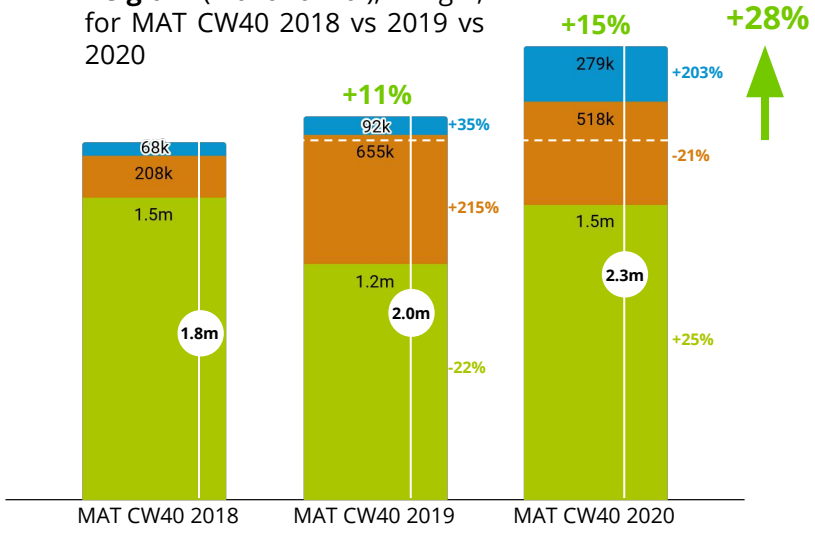
Plant-based sector deep dive: Belgium
Discounters' plant-based plain-milk sales

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

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



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



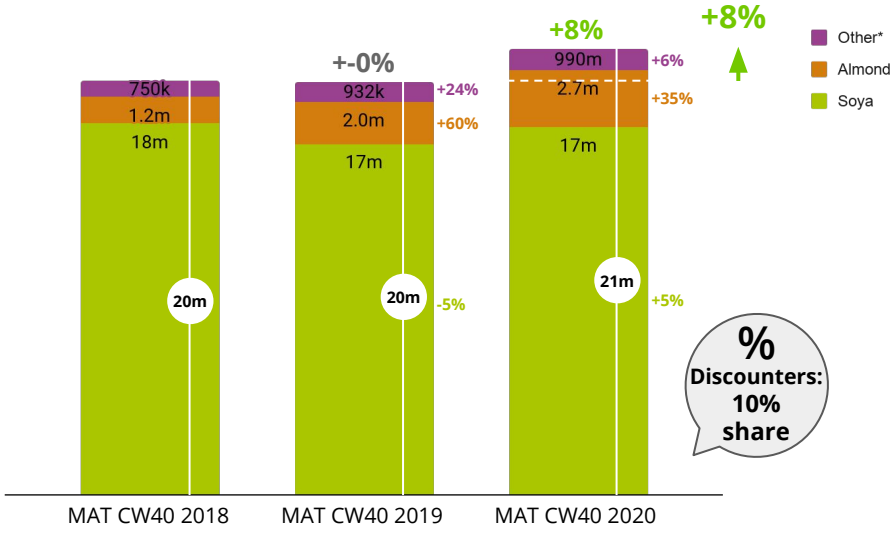
Source: Nielsen MarketTrack

MAT=Moving Annual Total

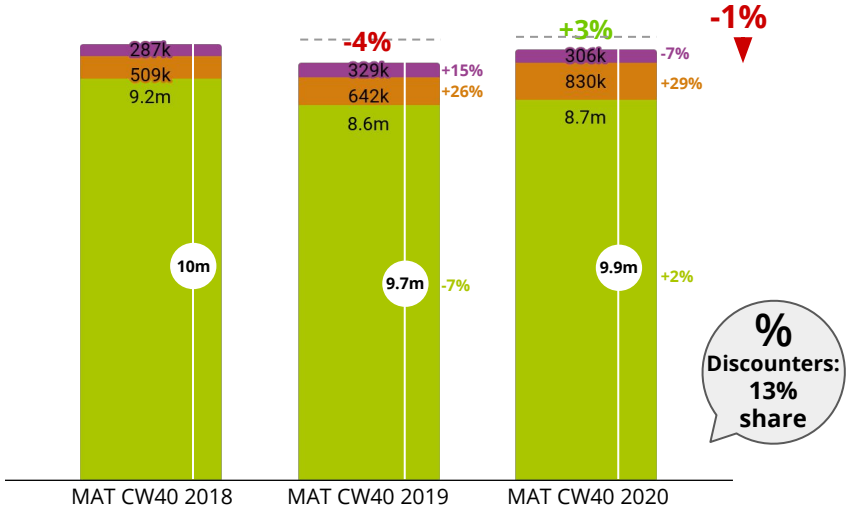
Plant-based sector deep dive: Belgium
Total plant-based flavoured-milk sales

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

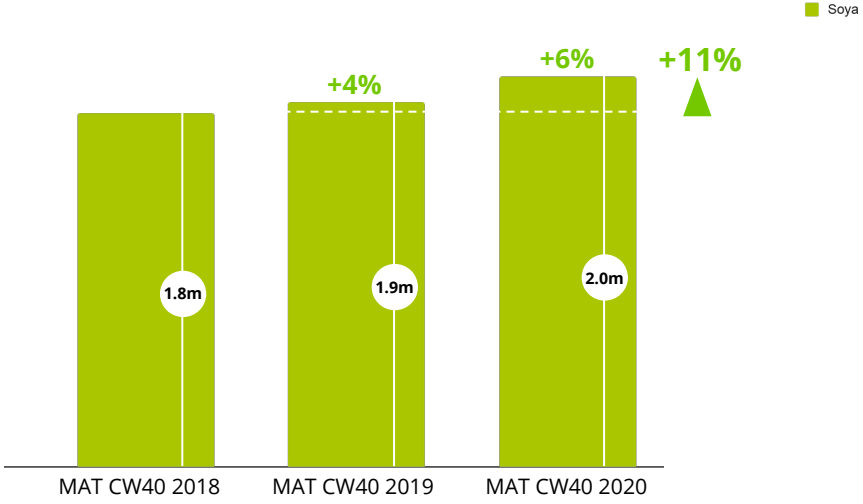
Source: Nielsen MarketTrack

MAT=Moving Annual Total

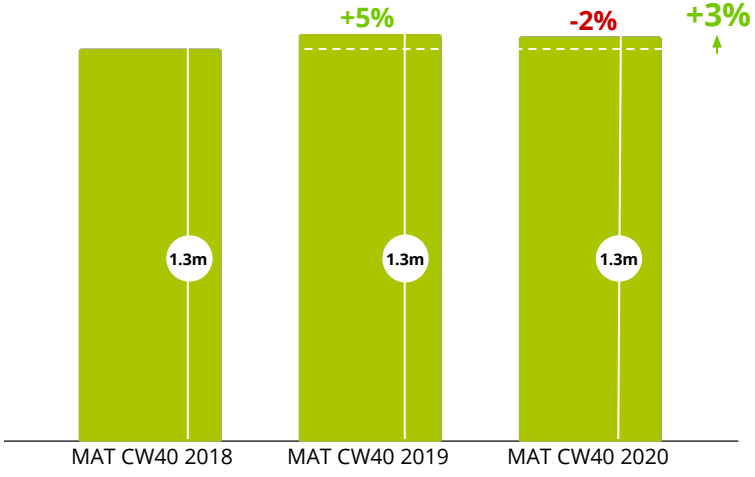
Plant-based sector deep dive: Belgium
Discounters' PB flavoured-milk sales

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

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



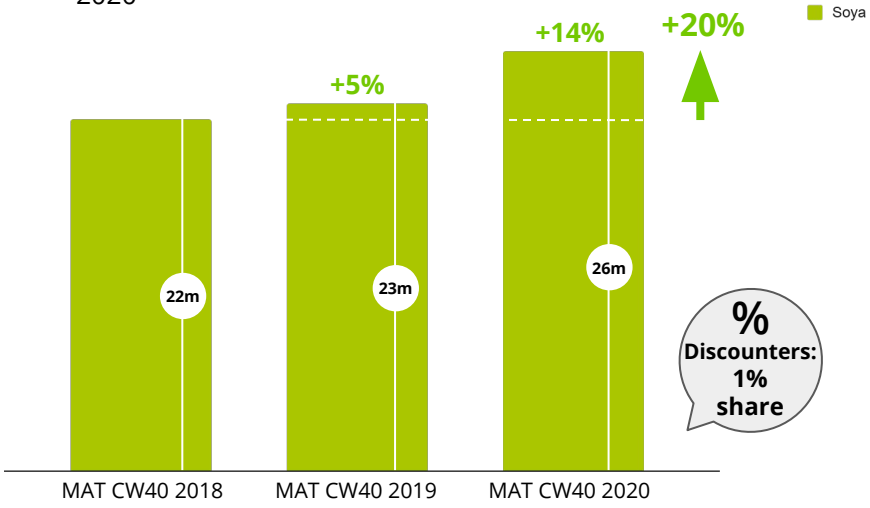
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

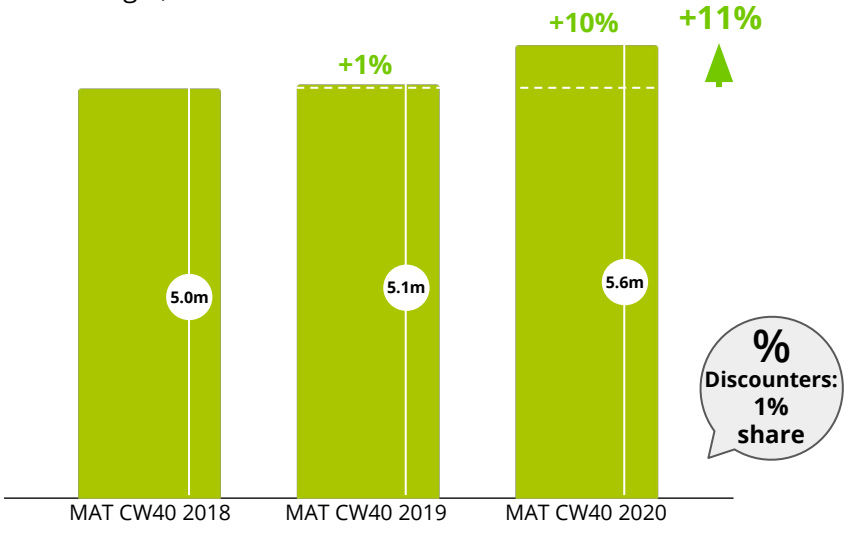
Plant-based sector deep dive: Belgium
Total plant-based-yoghurt sales

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



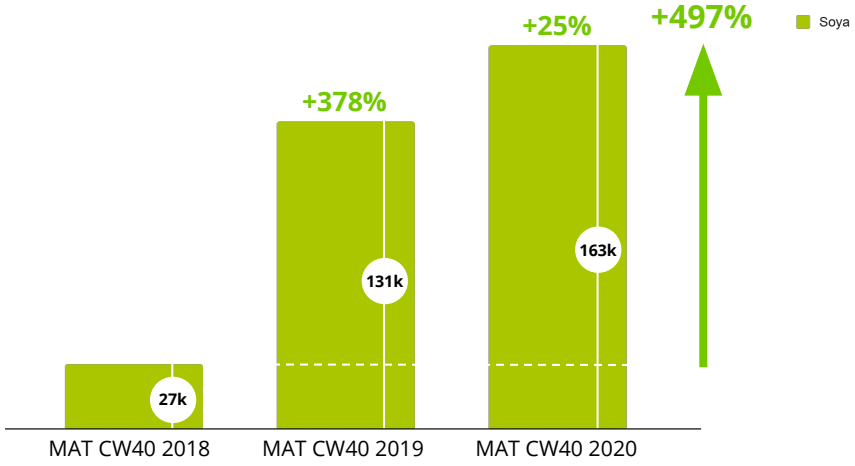
Source: Nielsen MarketTrack

MAT=Moving Annual Total

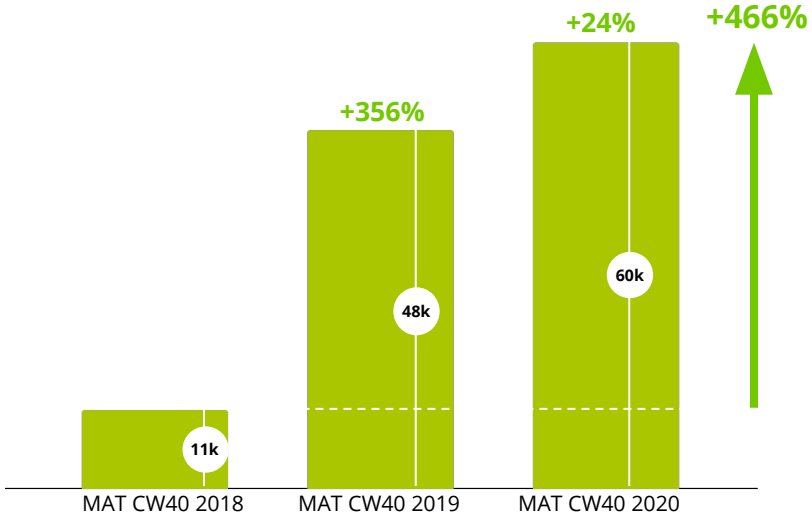
Plant-based sector deep dive: Belgium
Discounters' plant-based-yoghurt sales

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



Source: Nielsen MarketTrack

MAT=Moving Annual Total

smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

Denmark

www.smartproteinproject.eu

Agenda – 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”.

Source: Nielsen MarketTrack

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.

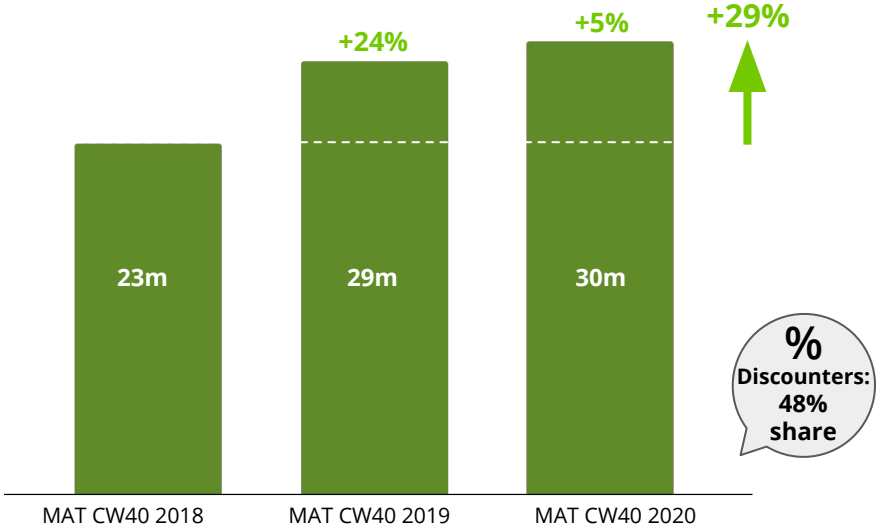
*Includes plant-based meat (vegan and vegetarian, no dairy-ingredients), plant-based milk, plant-based yoghurt; all numbers refer to MAT CW40 2020 if not stated otherwise

Source: Nielsen MarketTrack

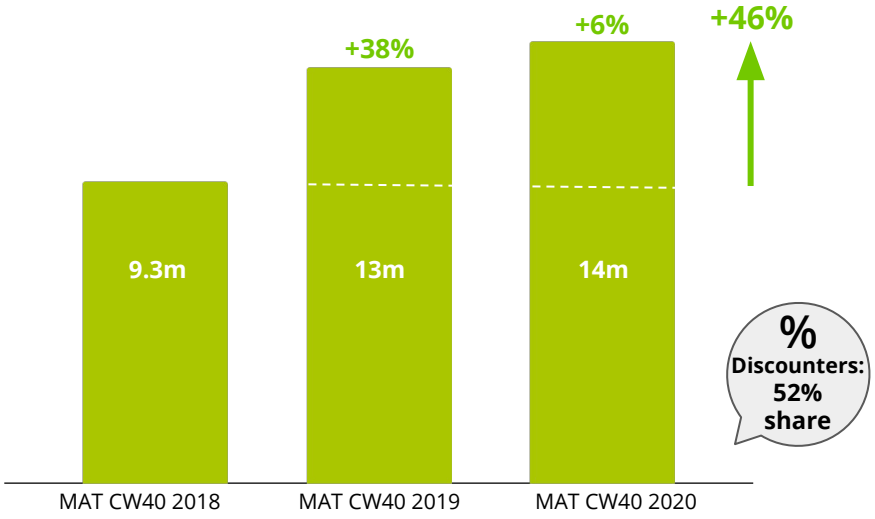
Plant-based sector overview: Denmark
Total sales value and sales volume

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

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



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



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

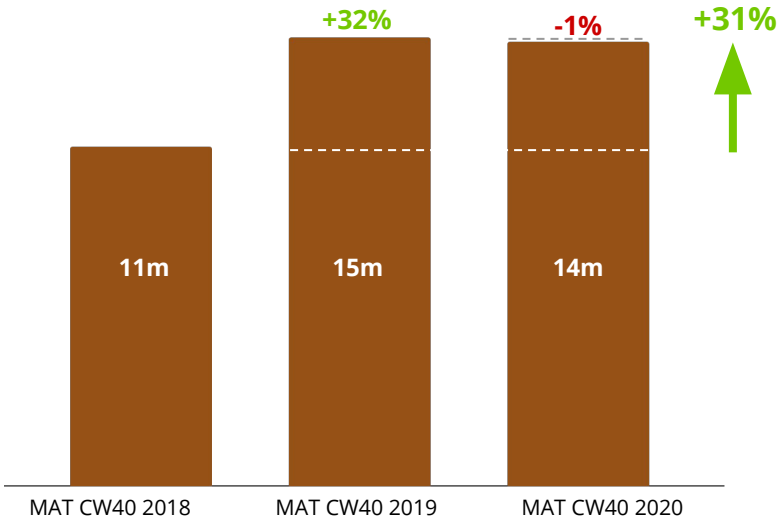
Source: Nielsen MarketTrack

MAT=Moving Annual Total

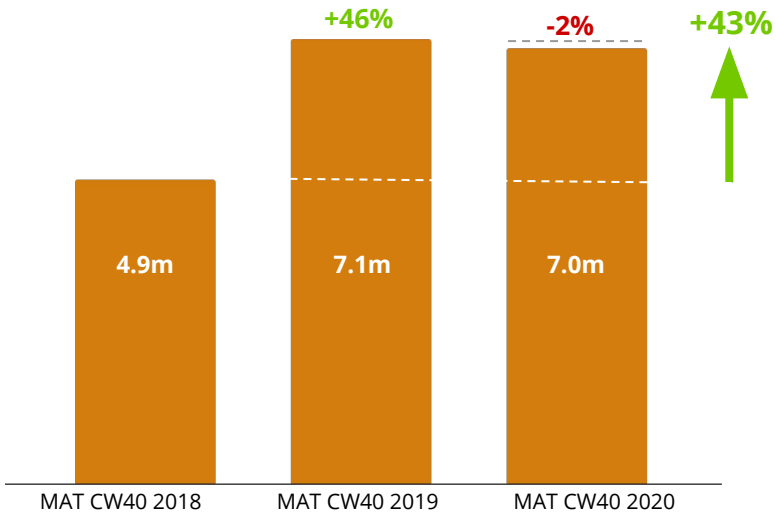
Plant-based sector overview: Denmark
Discounters' sales value and sales volume

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

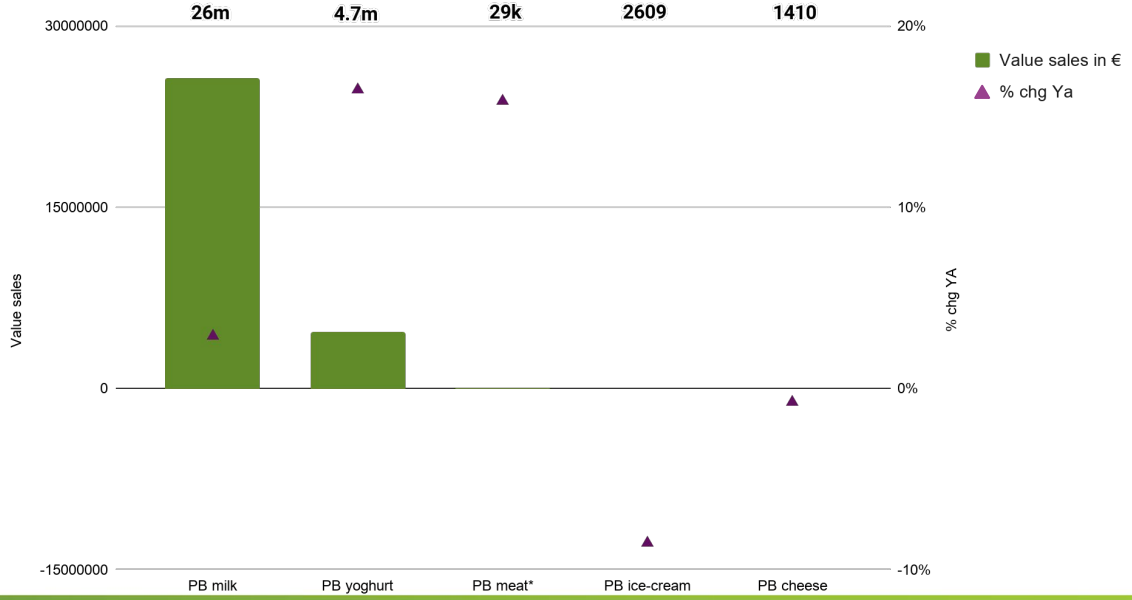
Source: Nielsen MarketTrack

MAT=Moving Annual Total

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

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

Sales value of plant-based food in Denmark (total grocery trade incl. discounters) by category, in €, for MAT CW40 2020



*Vegan and vegetarian

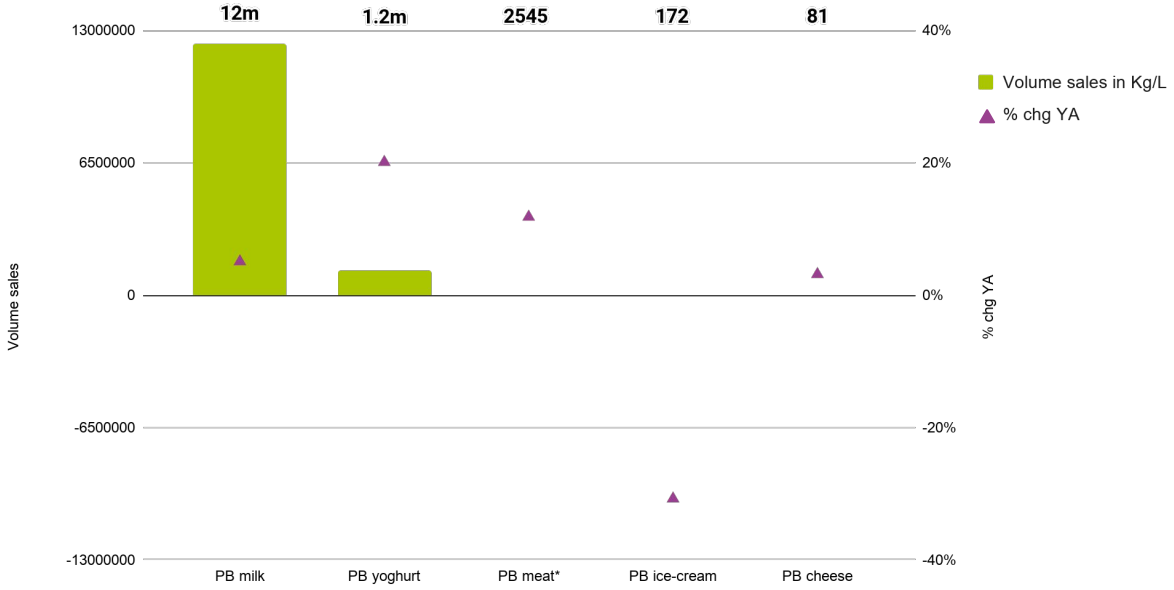
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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

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



*Vegan and vegetarian

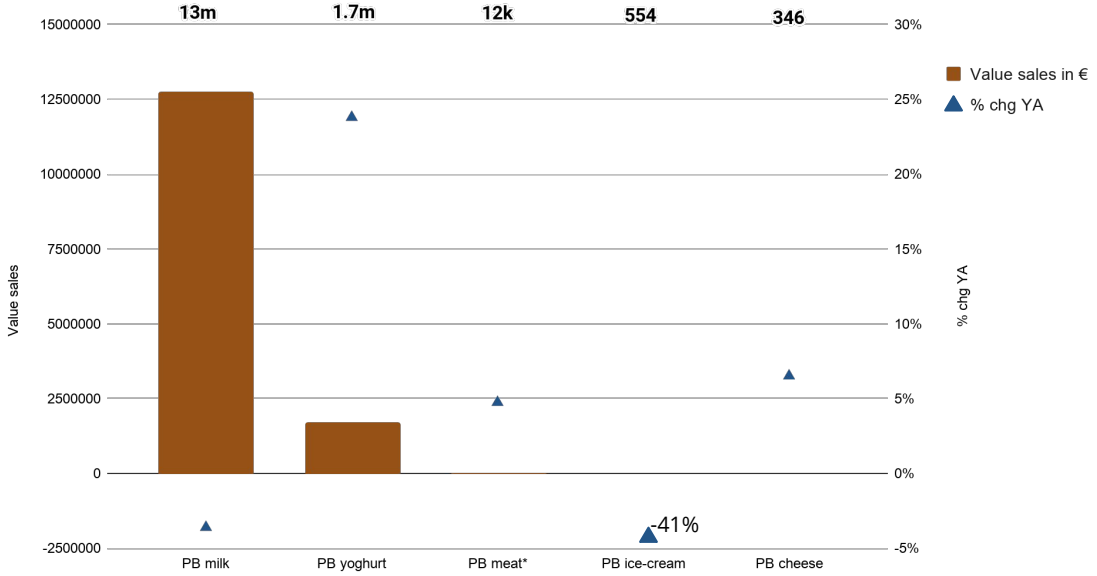
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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



*Vegan and vegetarian

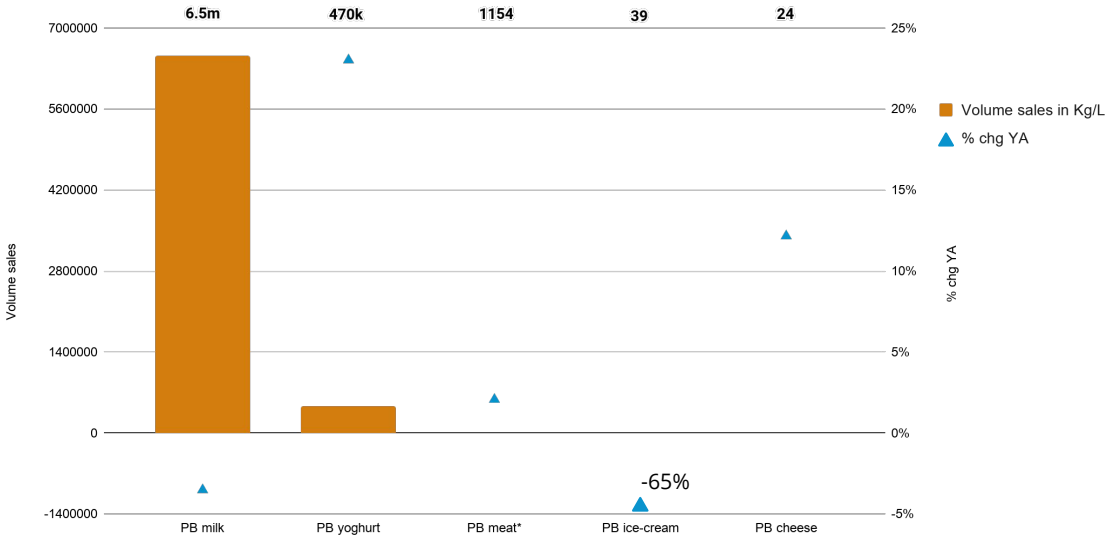
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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



*Vegan and vegetarian

Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

smart protein

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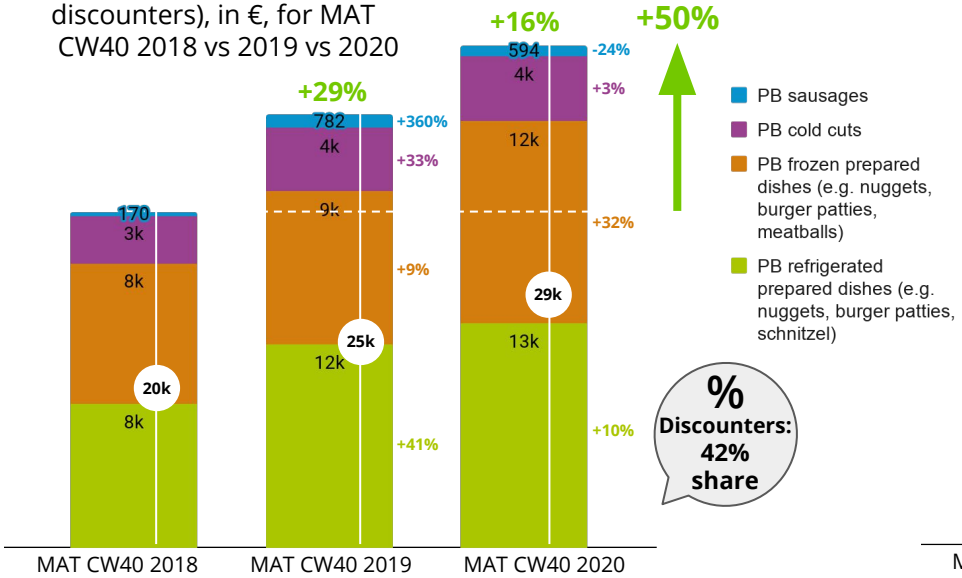
Plant-based sector deep dive: Denmark

www.smartproteinproject.eu

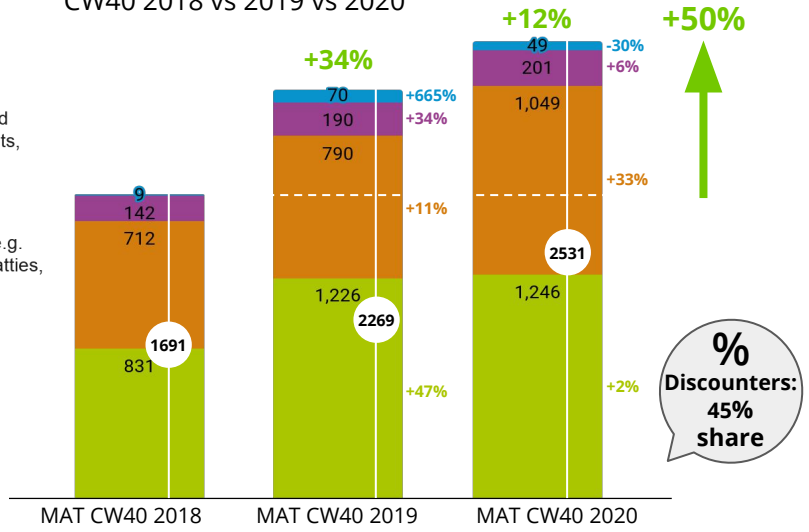
Plant-based sector deep dive: Denmark
Total plant-based-meat sales

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

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



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



*Vegan and vegetarian

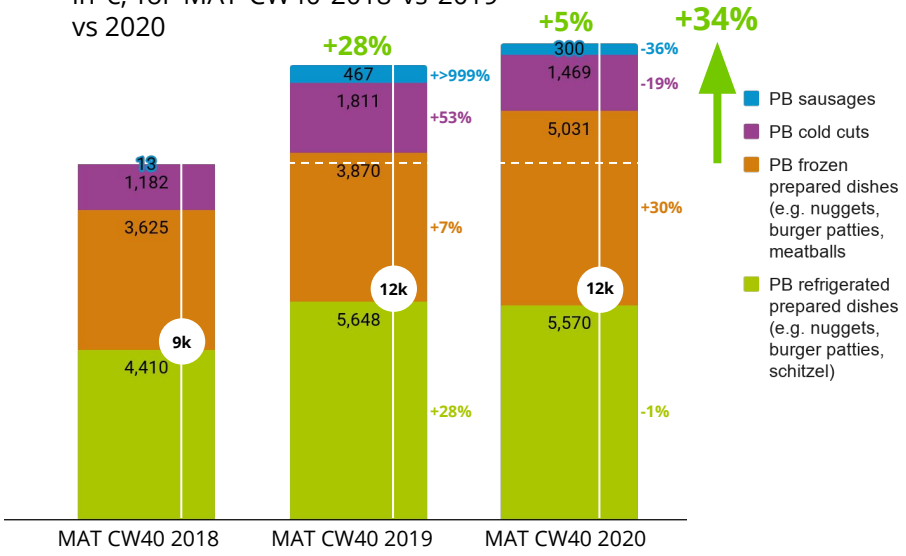
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

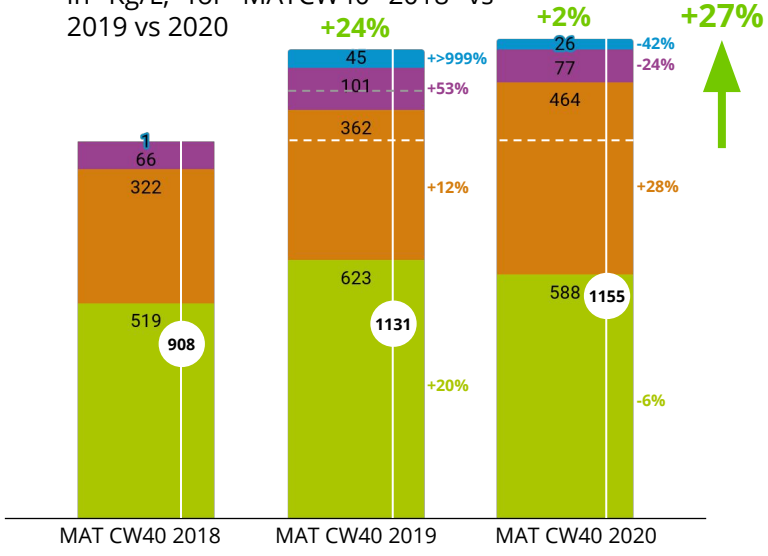
Plant-based sector deep dive: Denmark
Discounters' plant-based-meat sales

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

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



Discounters' sales volume of plant-based meat* in Denmark, in Kg/L, for MATCW40 2018 vs 2019 vs 2020



*Vegan and vegetarian

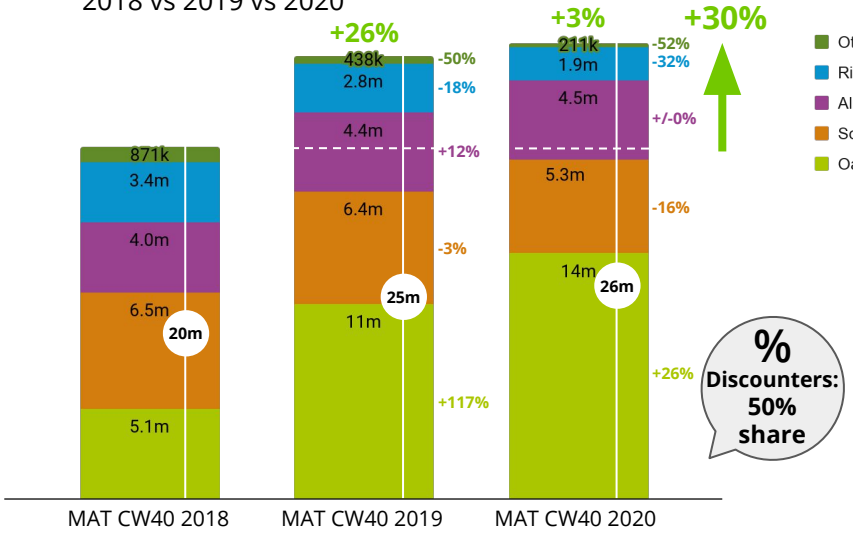
Source: Nielsen MarketTrack

MAT=Moving Annual Total

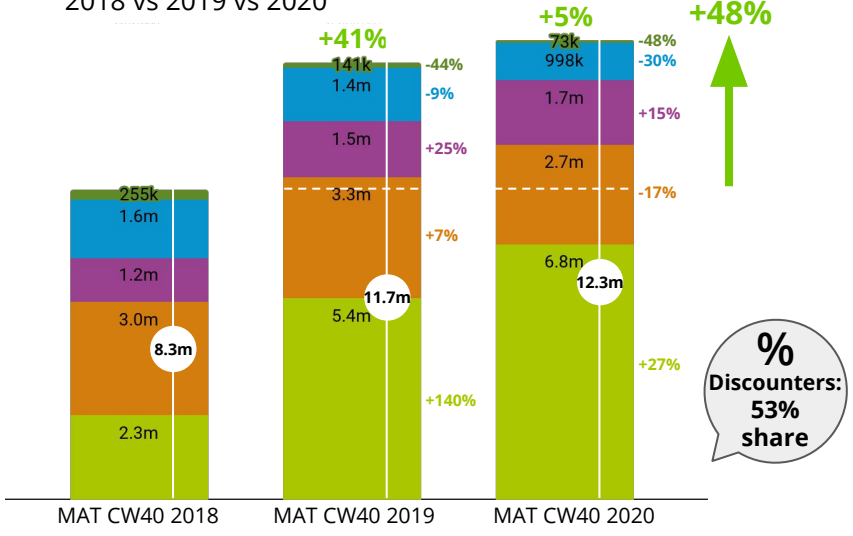
Plant-based sector deep dive: Denmark
Total plant-based milk sales

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

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



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



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

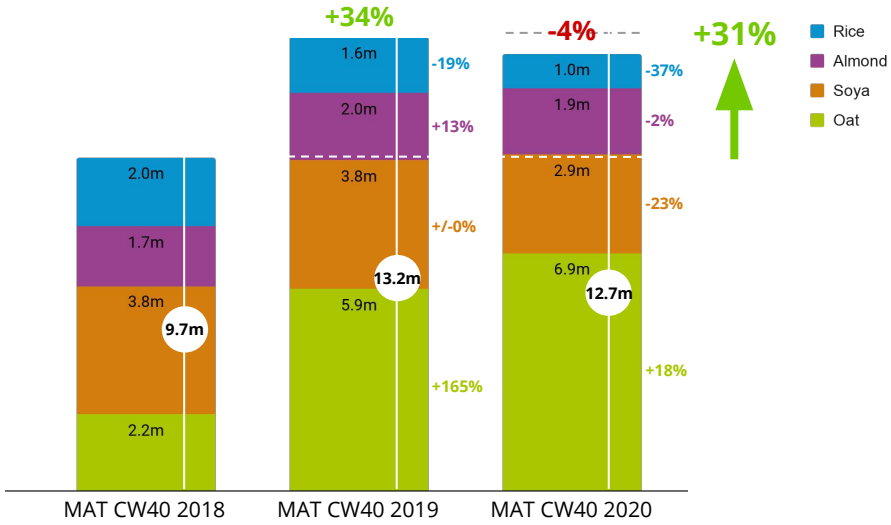
Source: Nielsen MarketTrack

MAT=Moving Annual Total

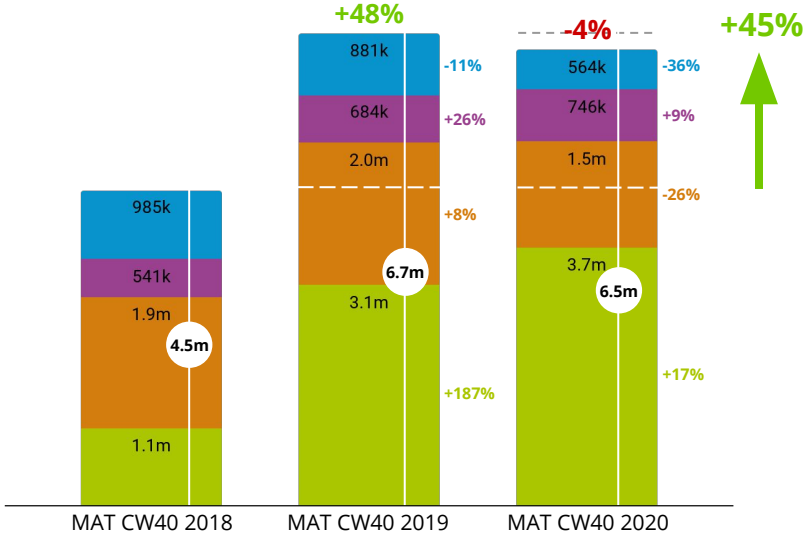
Plant-based sector deep dive: Denmark
Discounters' plant-based milk sales

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



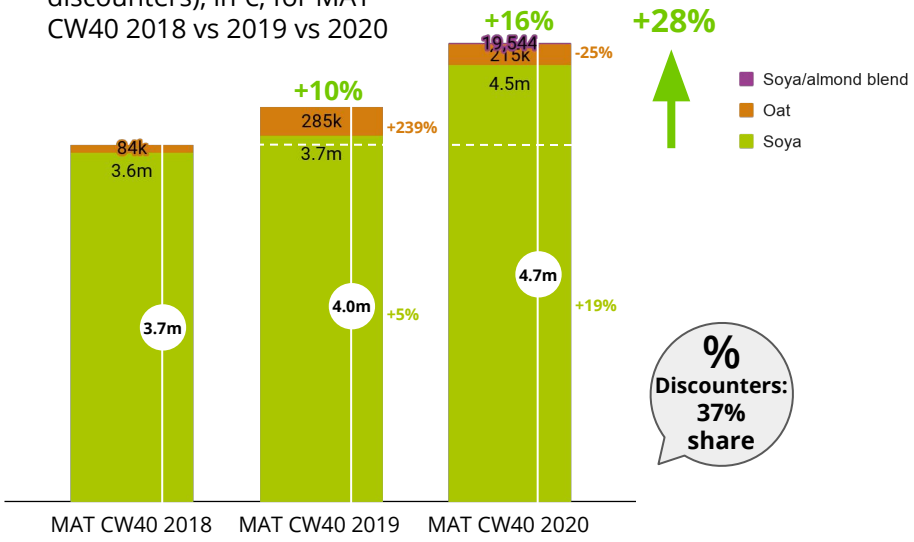
Source: Nielsen MarketTrack

MAT=Moving Annual Total

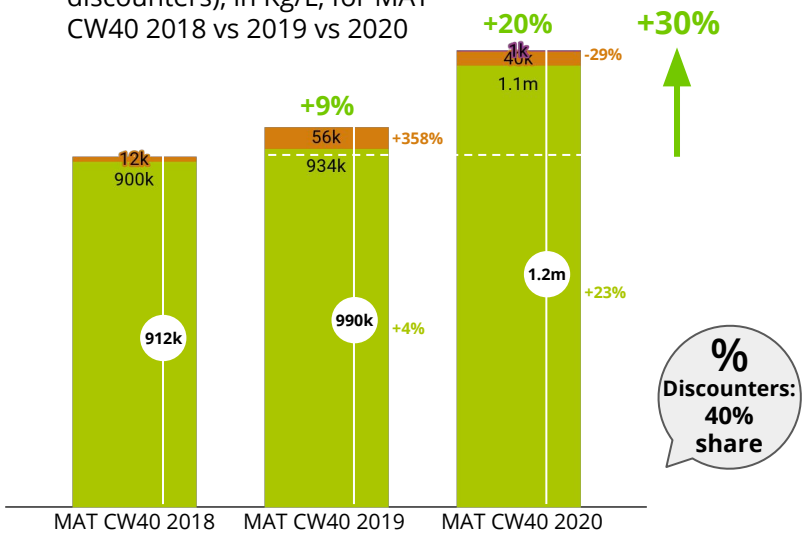
Plant-based sector deep dive: Denmark
Total plant-based-yoghurt sales

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

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



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



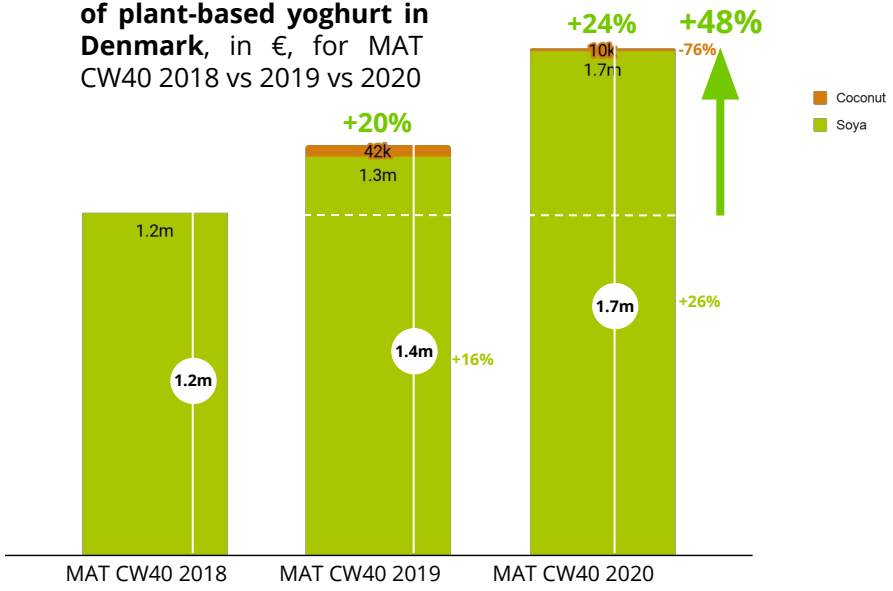
Source: Nielsen MarketTrack

MAT=Moving Annual Total

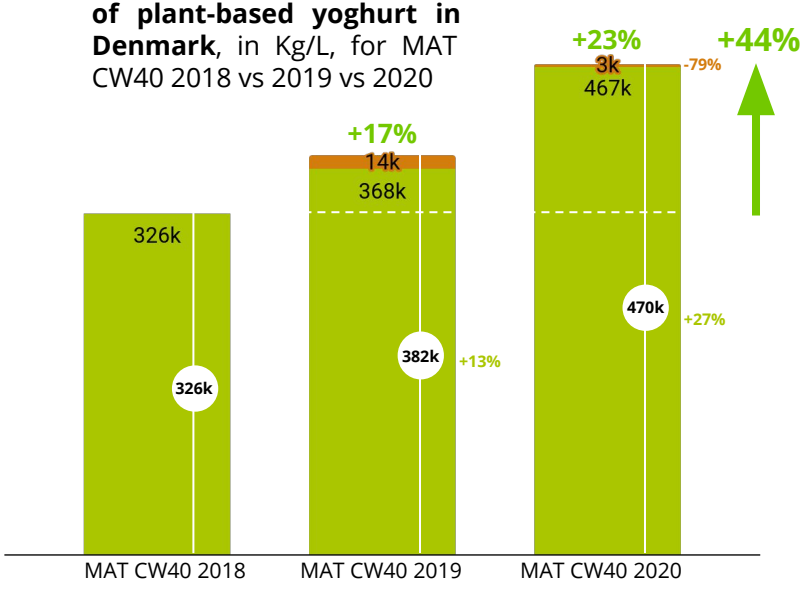
Plant-based sector deep dive: Denmark
Discounters' plant-based-yoghurt sales

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

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



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



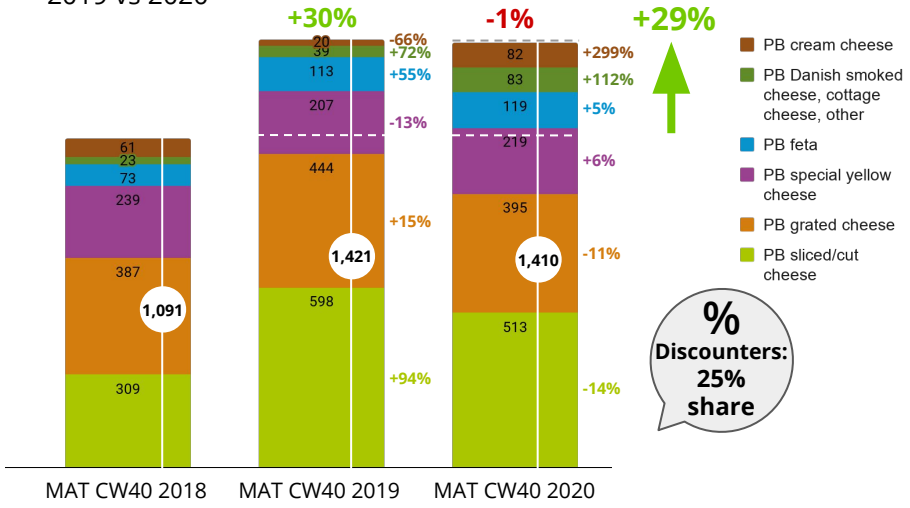
Source: Nielsen MarketTrack

MAT=Moving Annual Total

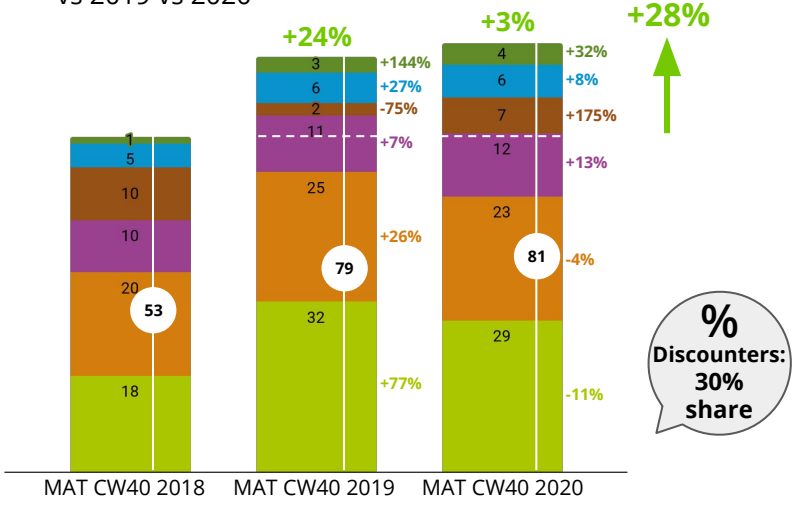
Plant-based sector deep dive: Denmark
Total plant-based-cheese sales

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 2019 vs 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



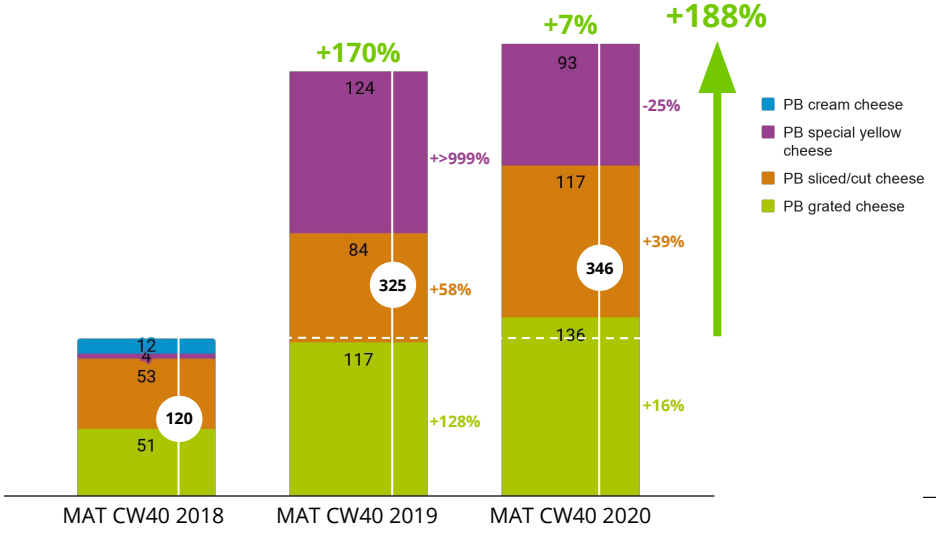
Source: Nielsen MarketTrack

MAT=Moving Annual Total

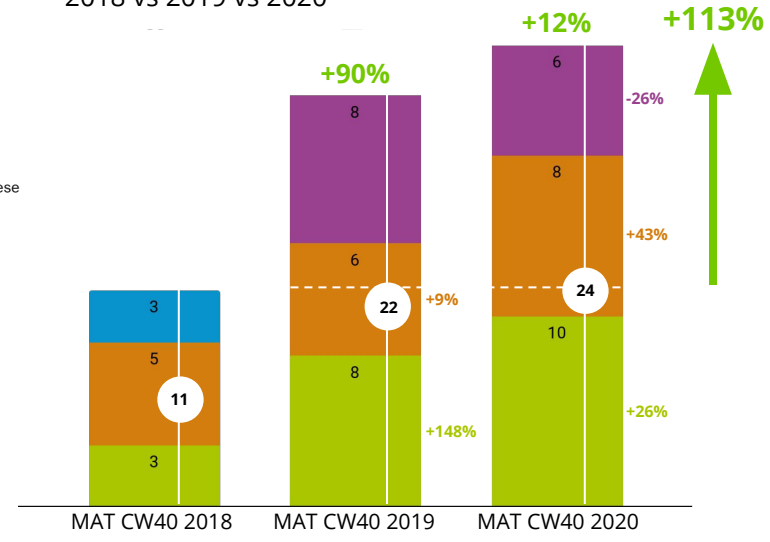
Plant-based sector deep dive: Denmark
Discounters' plant-based-cheese sales

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

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



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



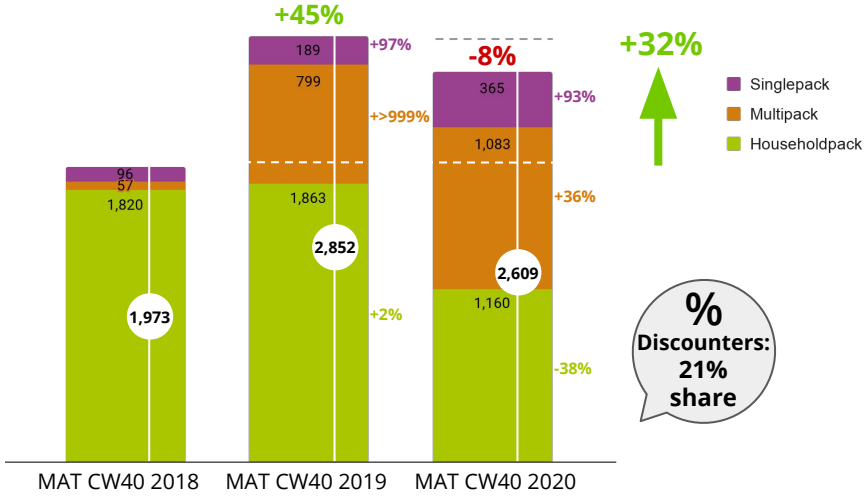
Source: Nielsen MarketTrack

MAT=Moving Annual Total

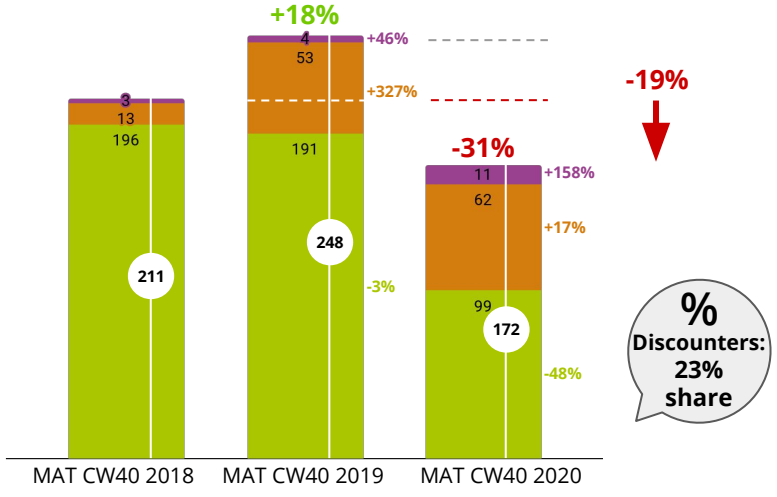
Plant-based sector deep dive: Denmark
Total plant-based ice-cream sales

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



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



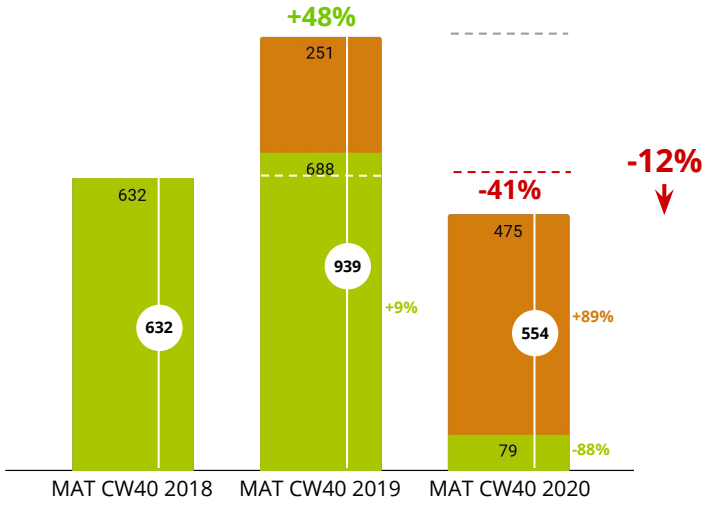
Source: Nielsen MarketTrack

MAT=Moving Annual Total

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

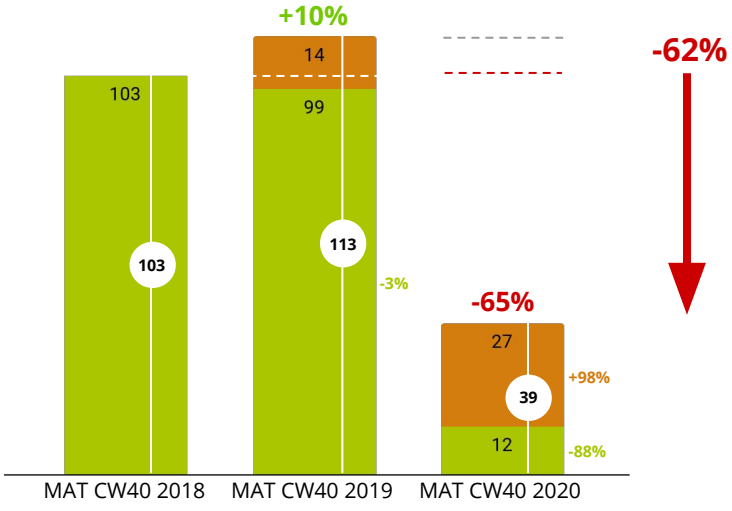
In discounters, multipacks showed even stronger growth.

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



Multipack
Householdpack

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



Source: Nielsen MarketTrack

MAT=Moving Annual Total

smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

France

www.smartproteinproject.eu

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”.

Source: Nielsen MarketTrack

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.

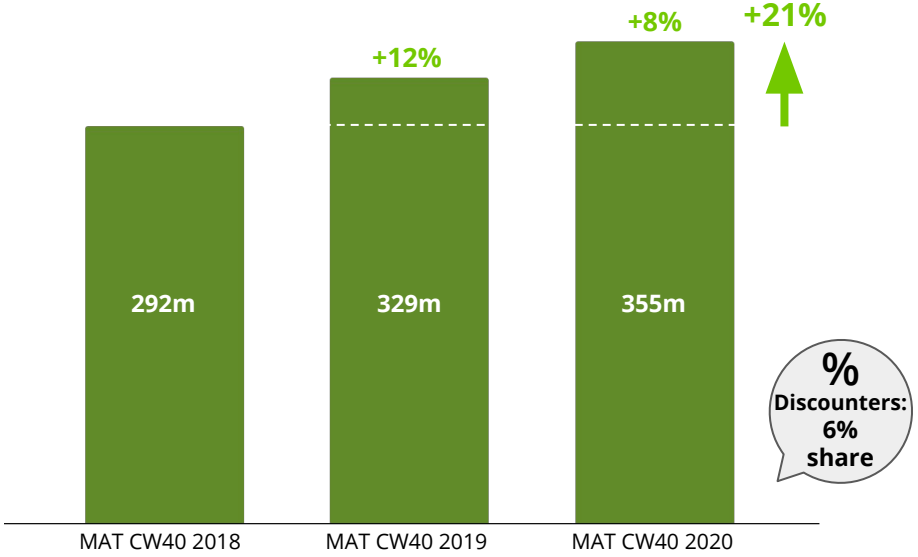
*Includes plant-based meat (vegan and vegetarian), plant-based milk, plant-based yoghurt

Source: Nielsen MarketTrack

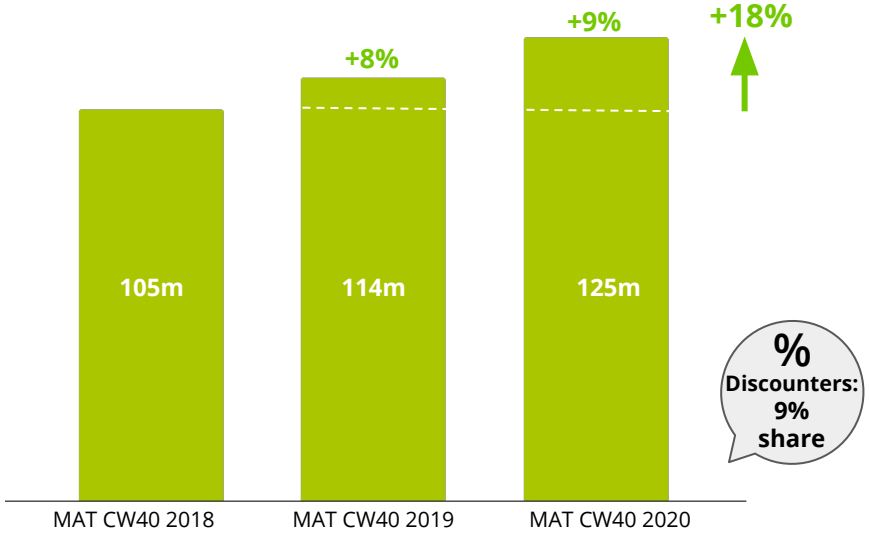
Plant-based sector overview: France
Total sales value and sales volume

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

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



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



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

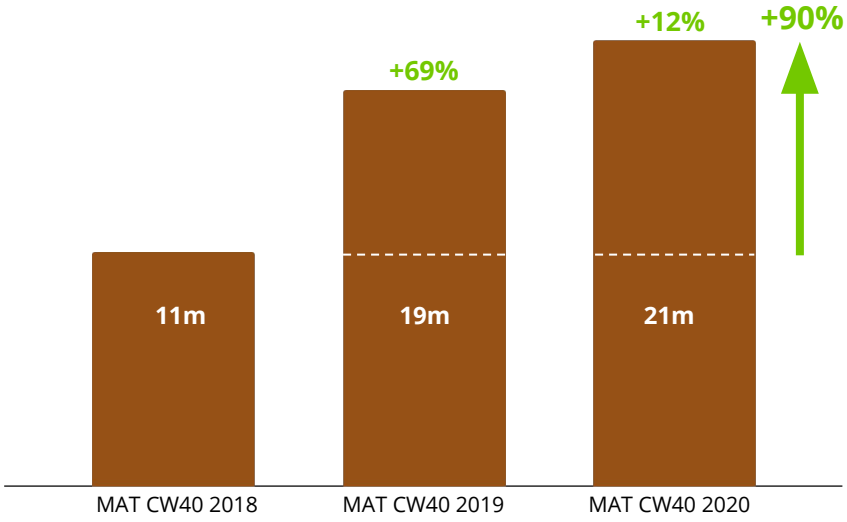
Source: Nielsen MarketTrack

MAT=Moving Annual Total

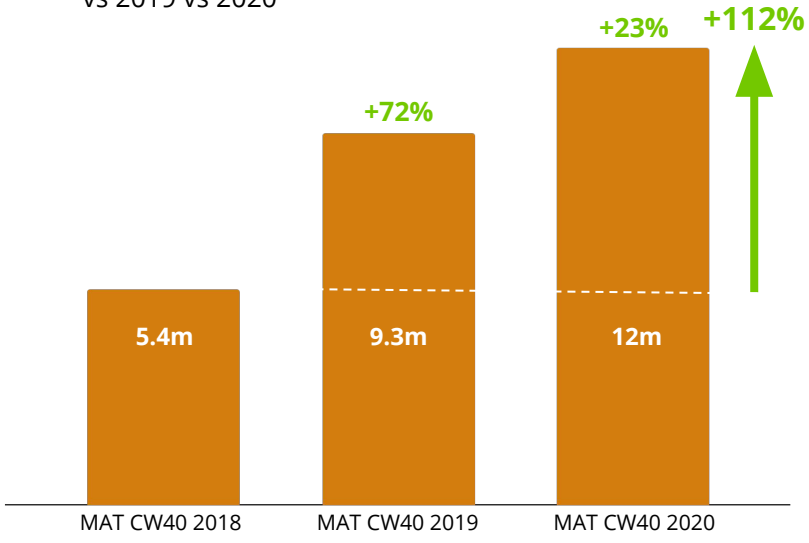
Plant-based sector overview: France
Discounters' sales value and sales volume

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



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



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

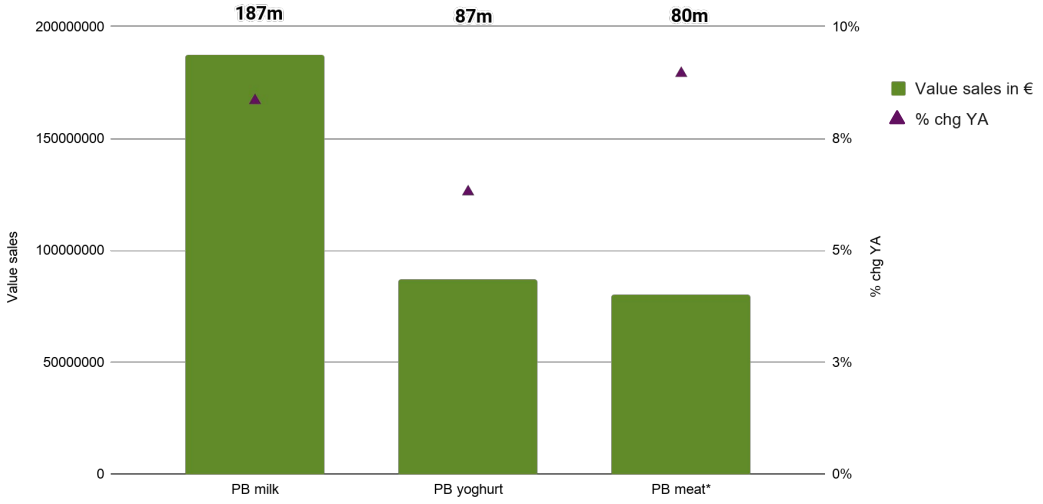
Source: Nielsen MarketTrack

MAT=Moving Annual Total

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



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

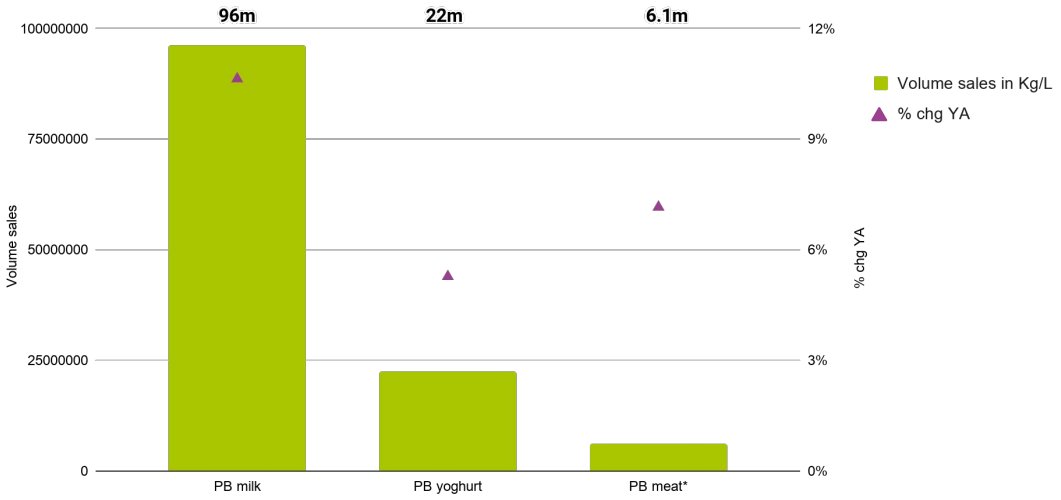
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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

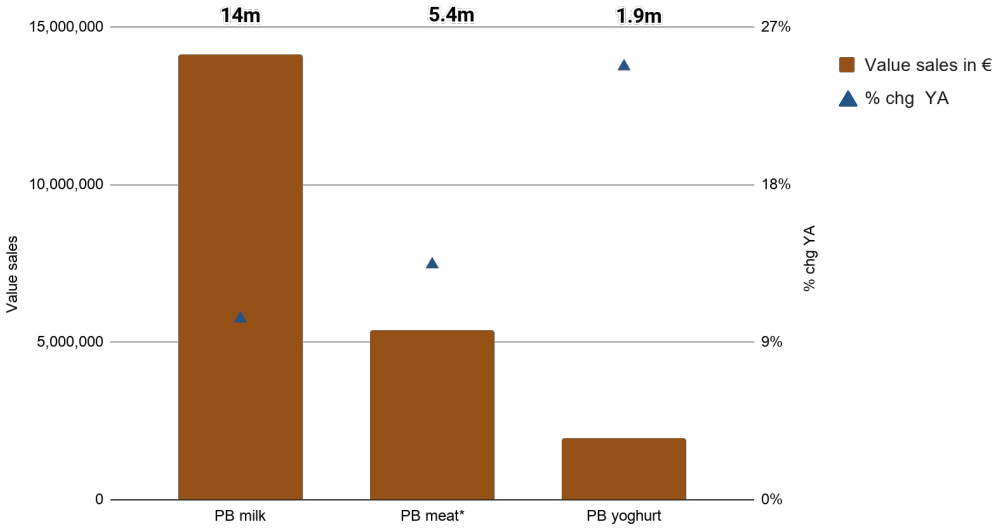
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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



*Vegan and vegetarian

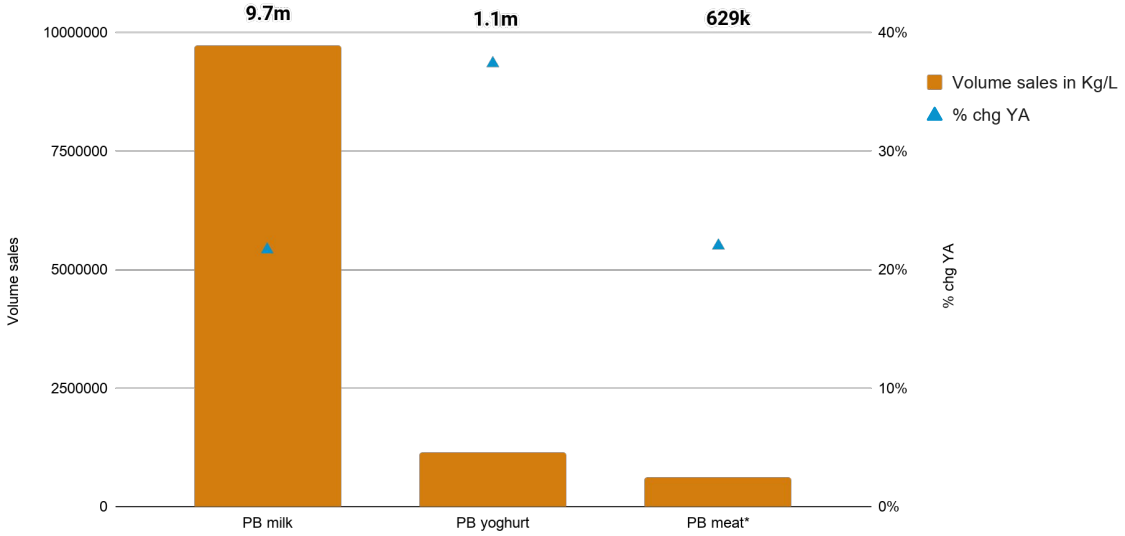
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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



*Vegan and vegetarian

Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

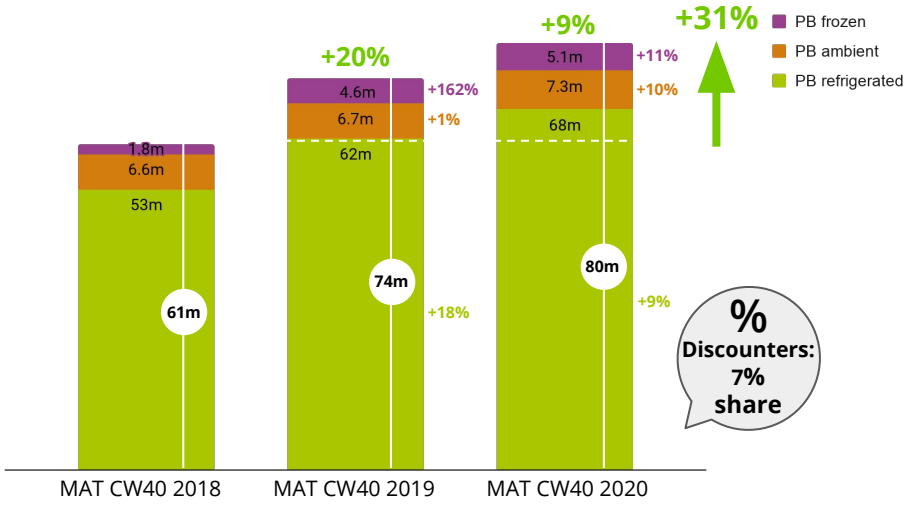
Plant-based sector deep dive: France

www.smartproteinproject.eu

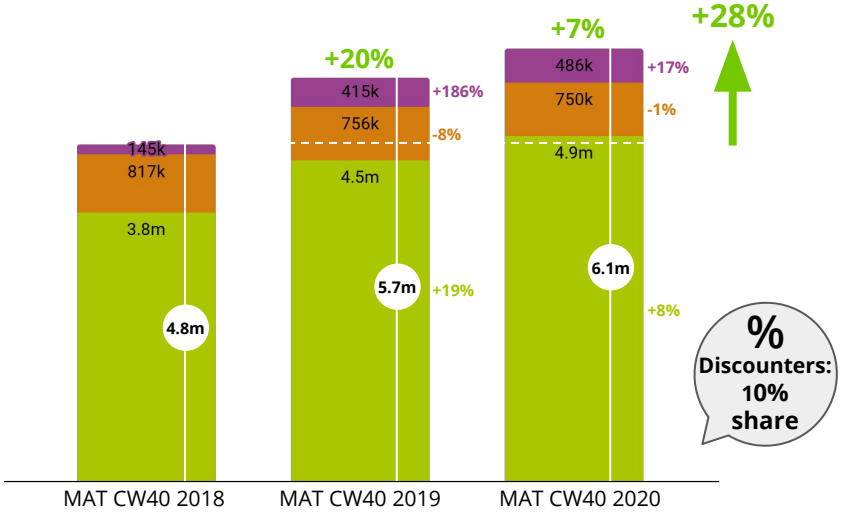
Plant-based sector deep dive: France
Total plant-based-meat sales

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



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

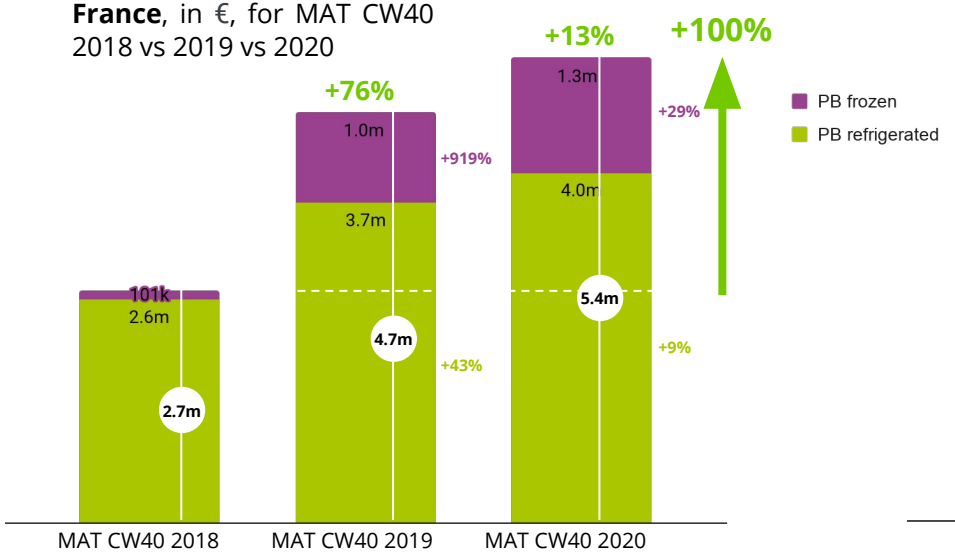
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

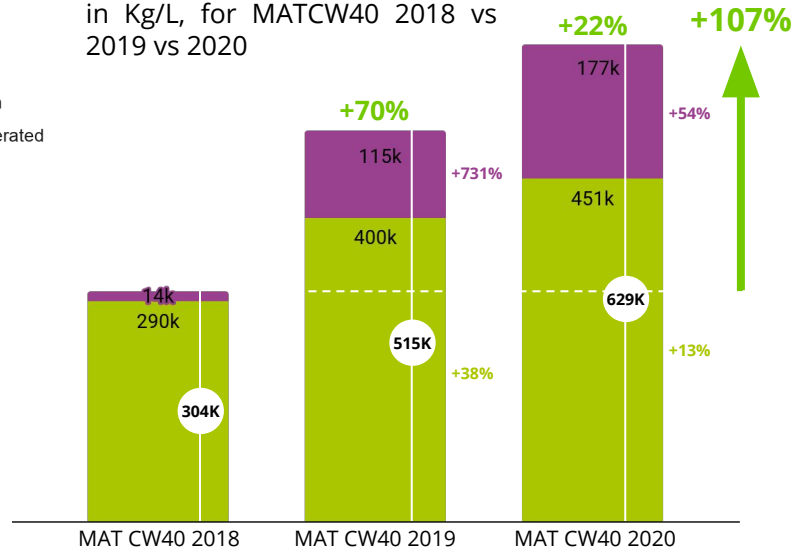
Plant-based sector deep dive: France
Discounters' plant-based-meat sales

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

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



Discounters' sales volume of plant-based meat* in France, in Kg/L, for MATCW40 2018 vs 2019 vs 2020



*Vegan and vegetarian

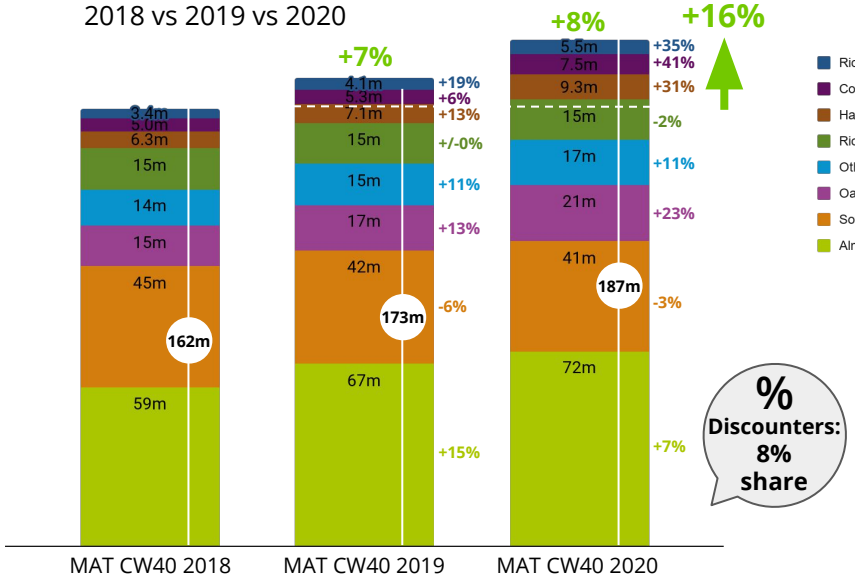
Source: Nielsen MarketTrack

MAT=Moving Annual Total

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

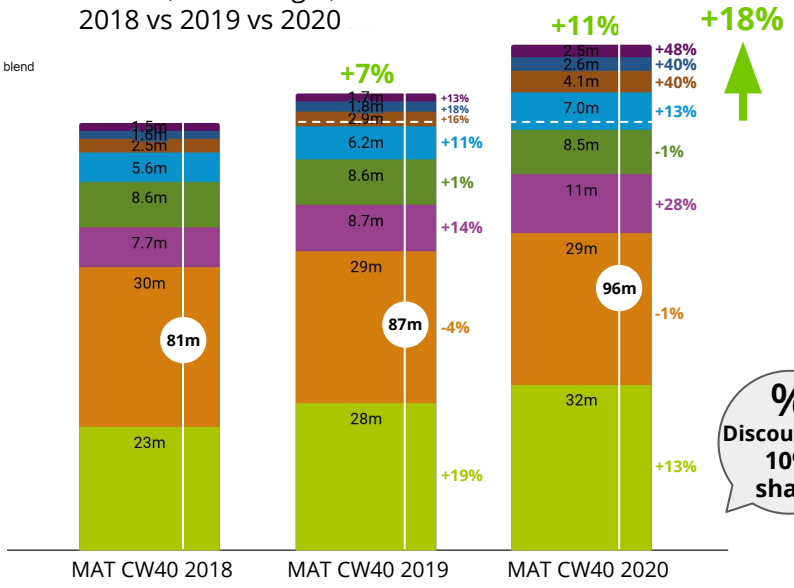
Almond milk has the highest sales value and volume, followed by soya and oat.

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



% Discounters: 8% share

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



% Discounters: 10% share

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

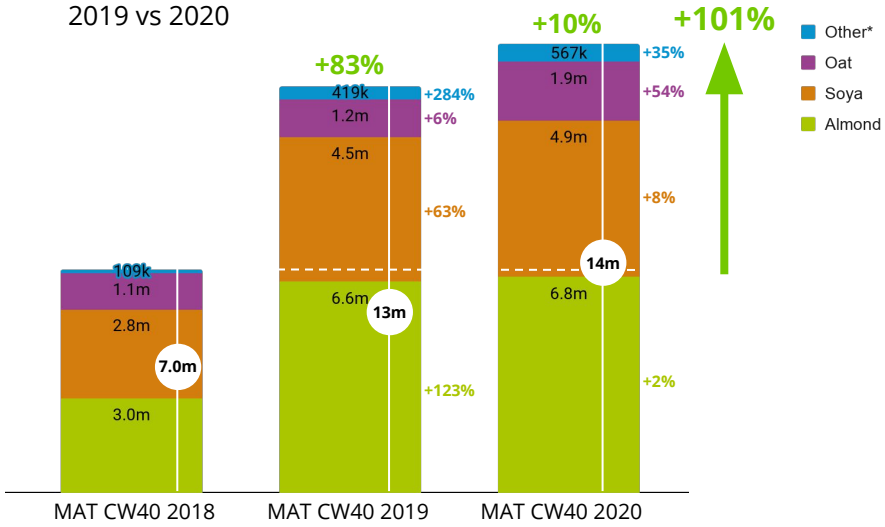
Source: Nielsen MarketTrack

MAT=Moving Annual Total

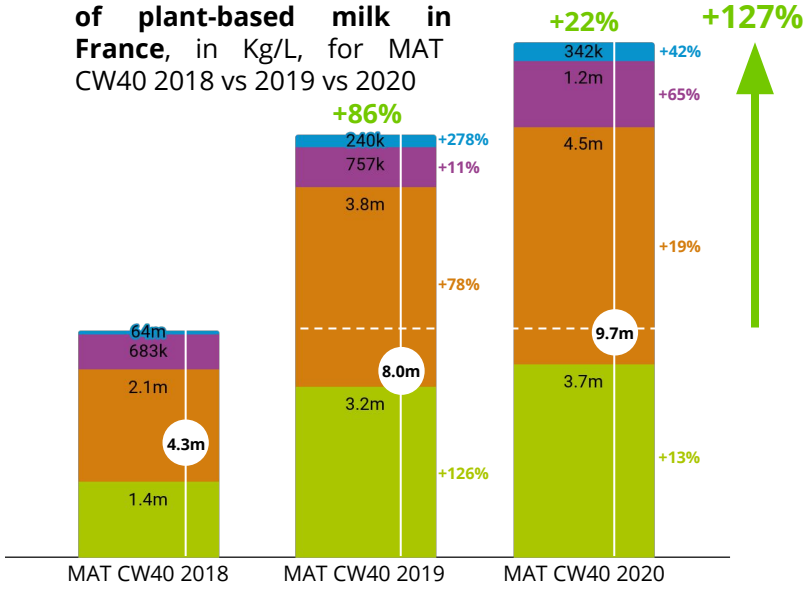
Plant-based sector deep dive: France
Discounters' plant-based-milk sales

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

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



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



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

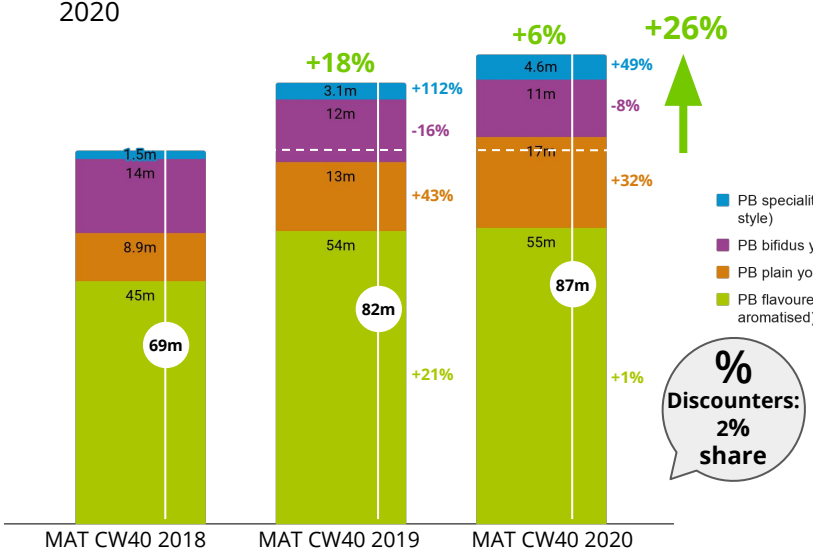
Source: Nielsen MarketTrack

MAT=Moving Annual Total

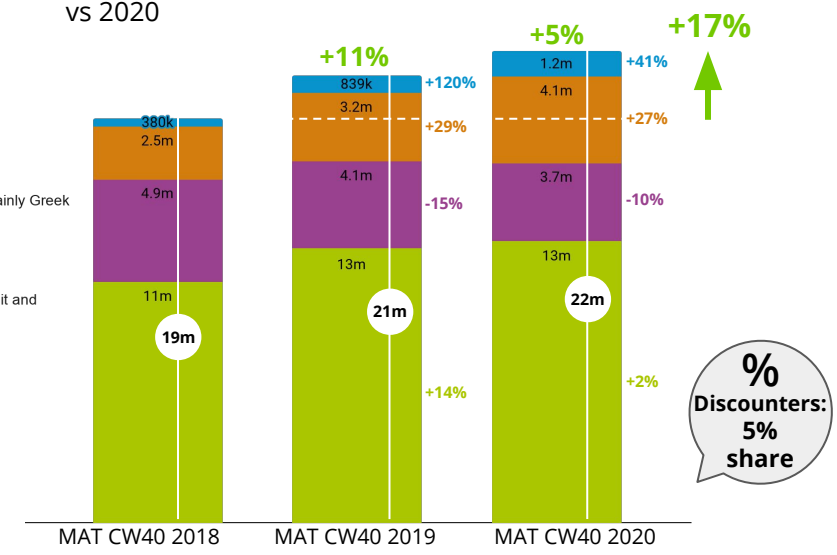
Plant-based sector deep dive: France
Total plant-based-yoghurt sales

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

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



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



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

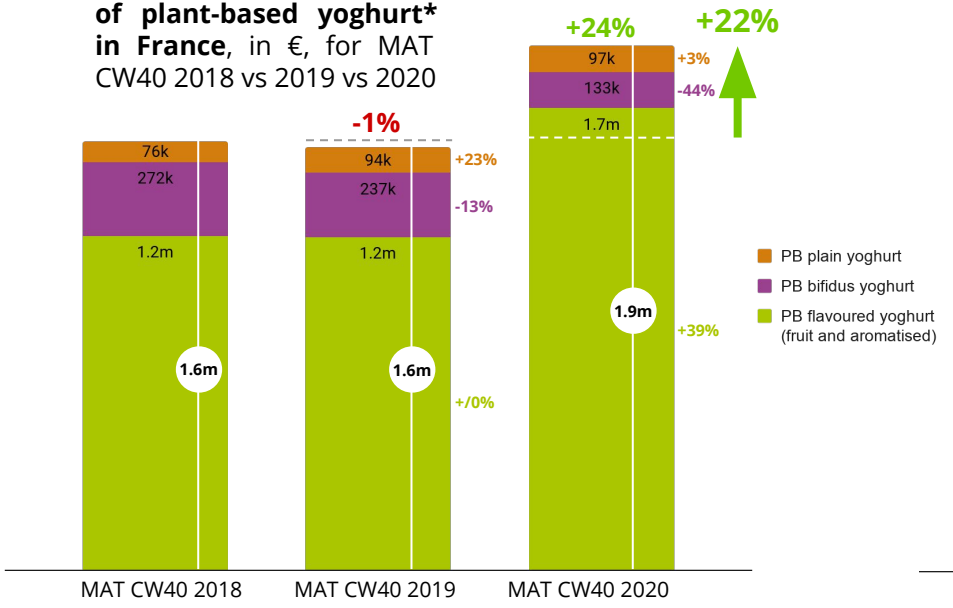
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

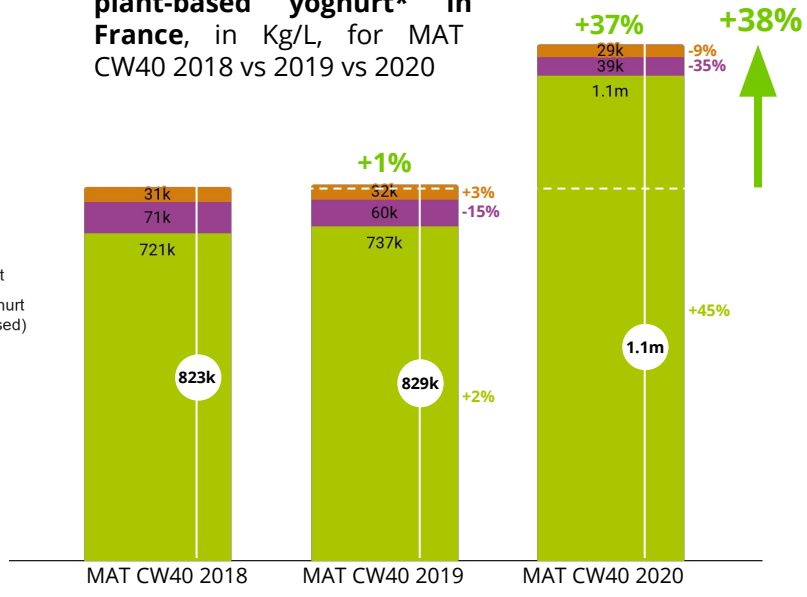
Plant-based sector deep dive: France
Discounters' plant-based-yoghurt sales

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

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



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



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

Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

smart protein

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Germany

www.smartproteinproject.eu

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”.

Source: Nielsen MarketTrack

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.

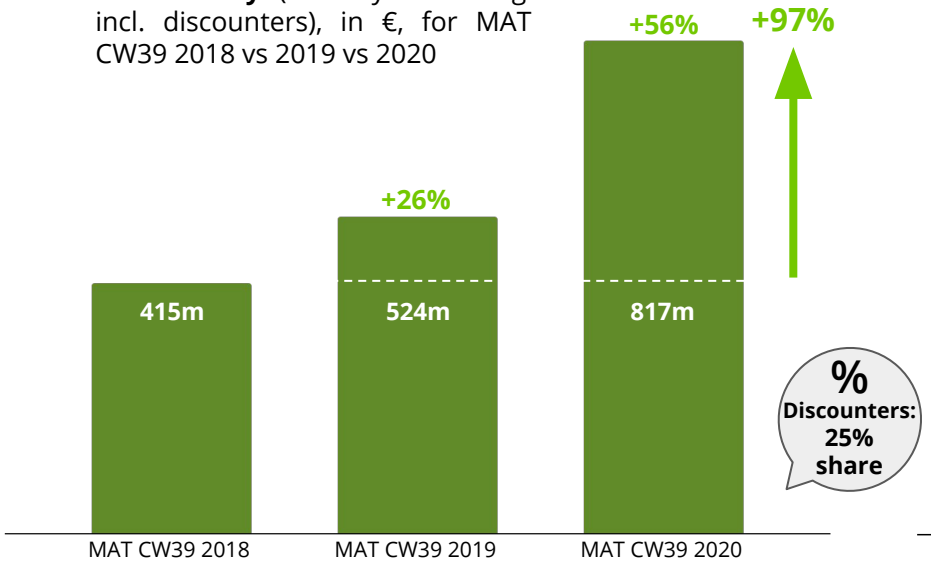
*Plant-based meat (only vegan), plant-based fish, plant-based milk, plant-based cheese, plant-based yoghurt, plant-based ice cream; all numbers refer to MAT CW39 2020 if not stated otherwise.

Source: Nielsen MarketTrack

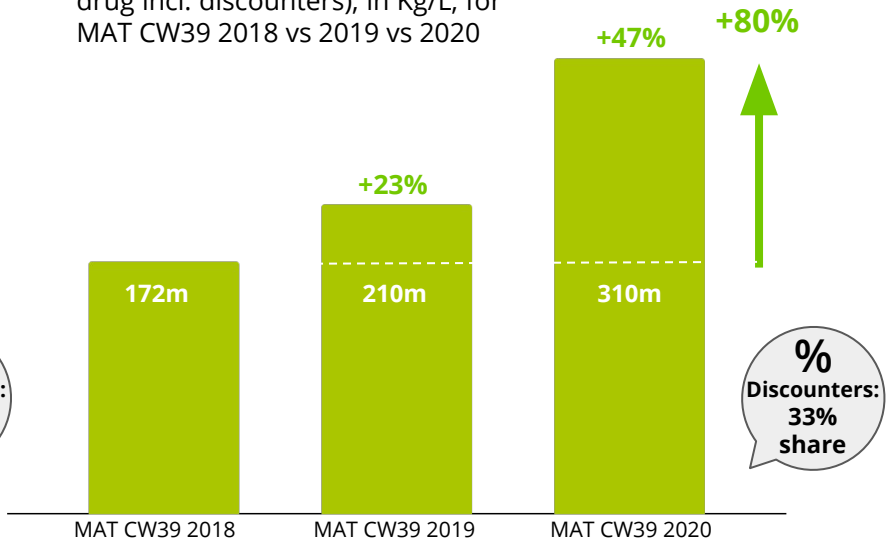
Plant-based sector overview: Germany
Total sales value and sales volume

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

Sales value of plant-based food* in Germany (Grocery and drug incl. discounters), in €, for MAT CW39 2018 vs 2019 vs 2020



Sales volume of plant-based food* in Germany (Grocery and drug incl. discounters), in Kg/L, for MAT CW39 2018 vs 2019 vs 2020



*Plant-based meat (only vegan), plant-based fish, plant-based milk incl. plant-based flavoured milk, plant-based cheese self service, plant-based plain yoghurt, plant-based fruit yoghurt, plant-based ice cream, plant-based drinking yoghurt, plant-based spiced yoghurt

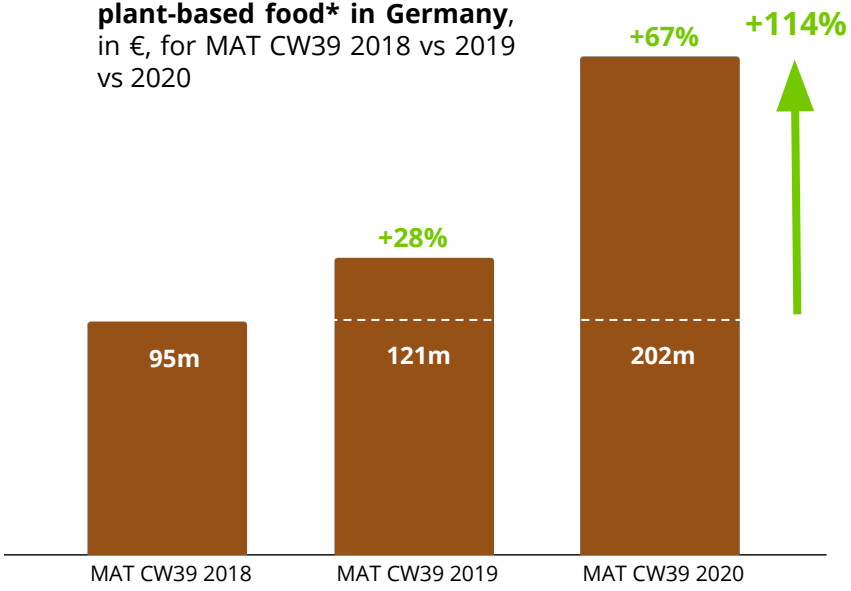
Source: Nielsen MarketTrack

MAT=Moving Annual Total

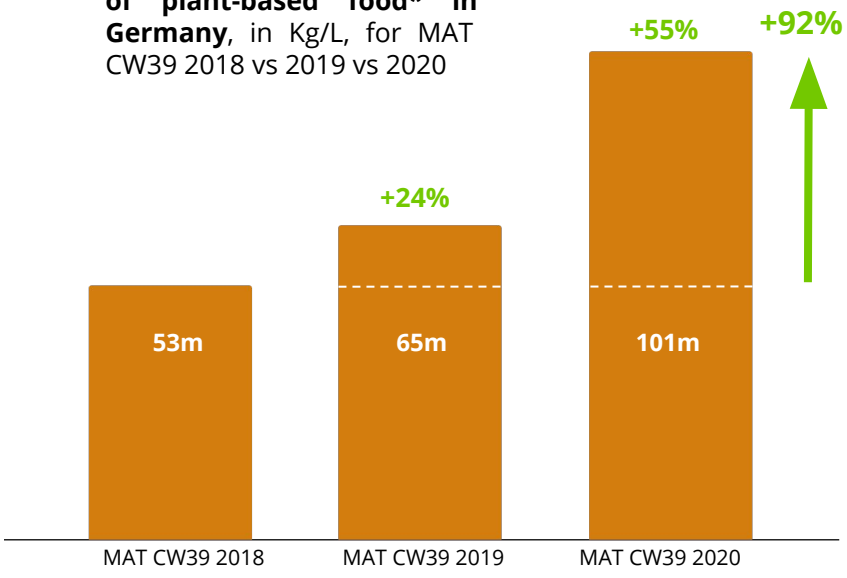
Plant-based sector overview: Germany
Discounters' sales value and sales volume

Discounters experienced even stronger growth over the past two periods.

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



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



*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

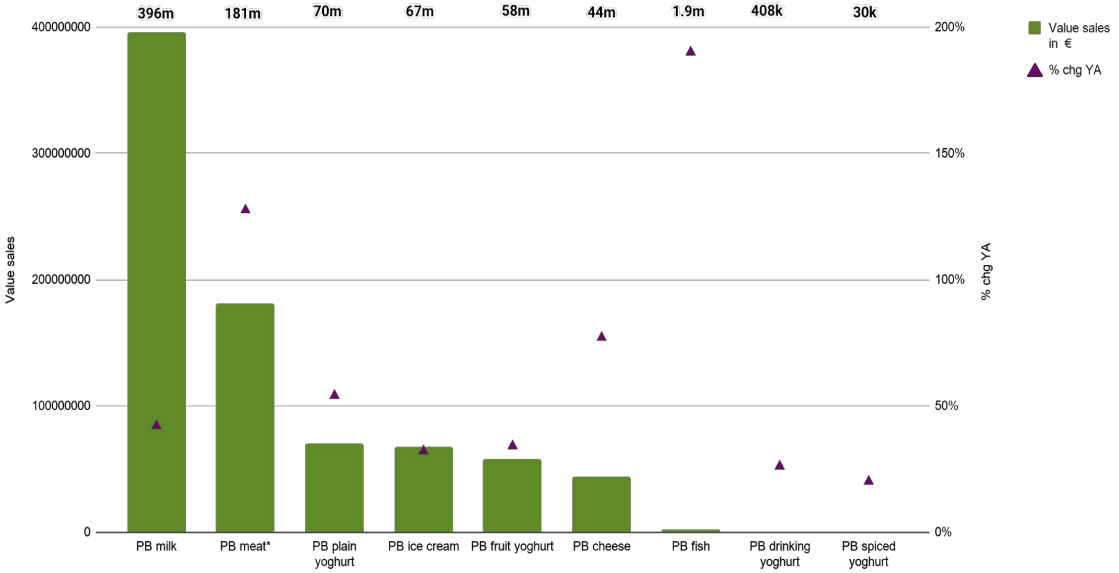
Source: Nielsen MarketTrack

MAT=Moving Annual Total

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



*Only vegan

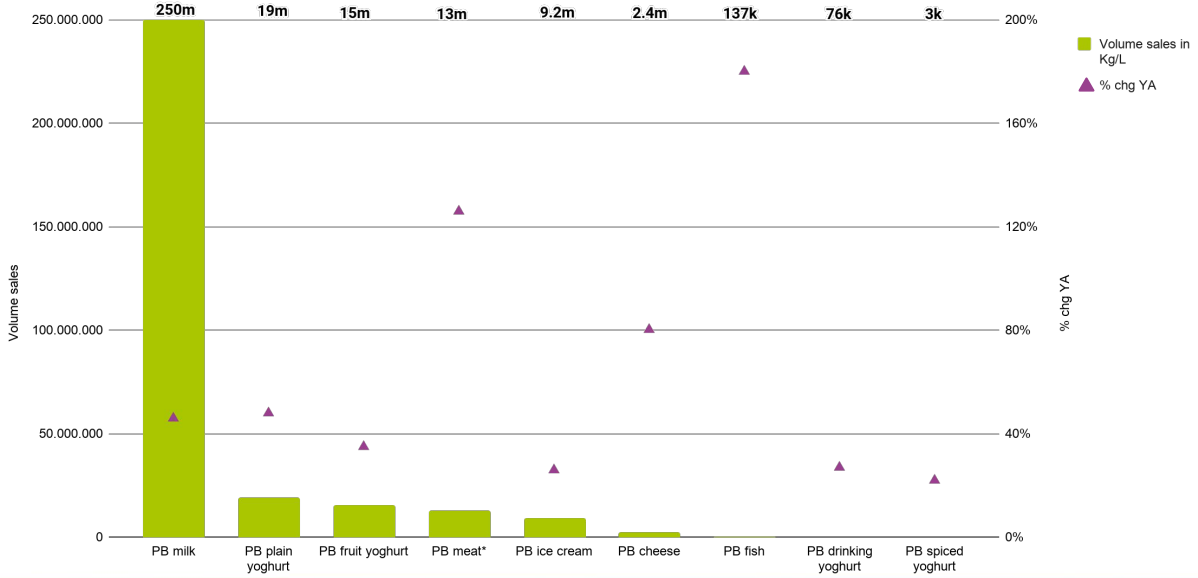
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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

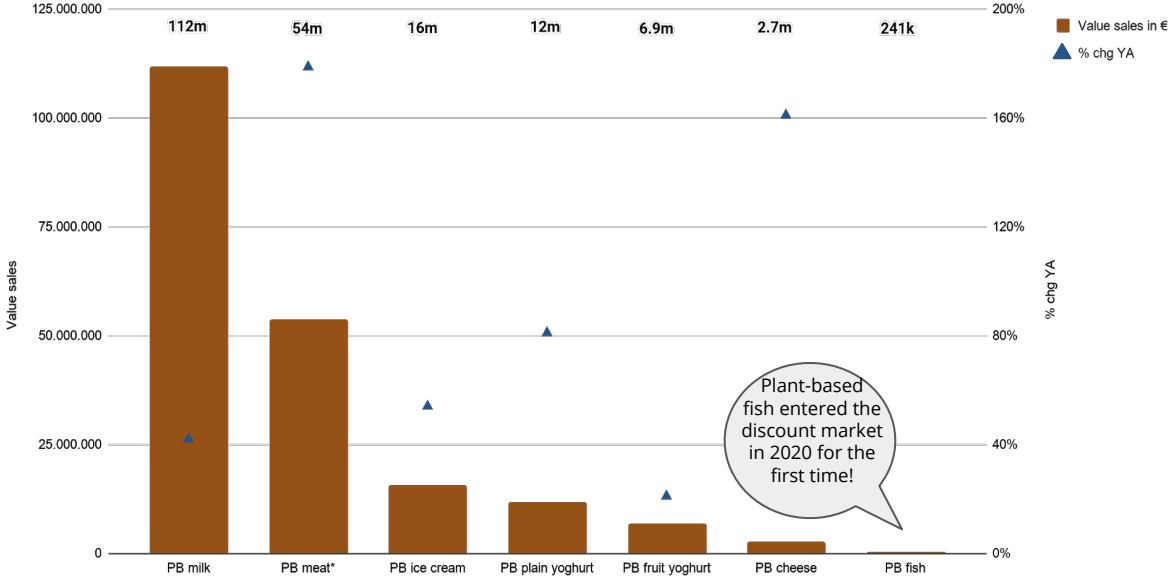
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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.

Discounters' sales value of plant-based food in Germany by category, in €, for MAT CW39 2020



*Only vegan

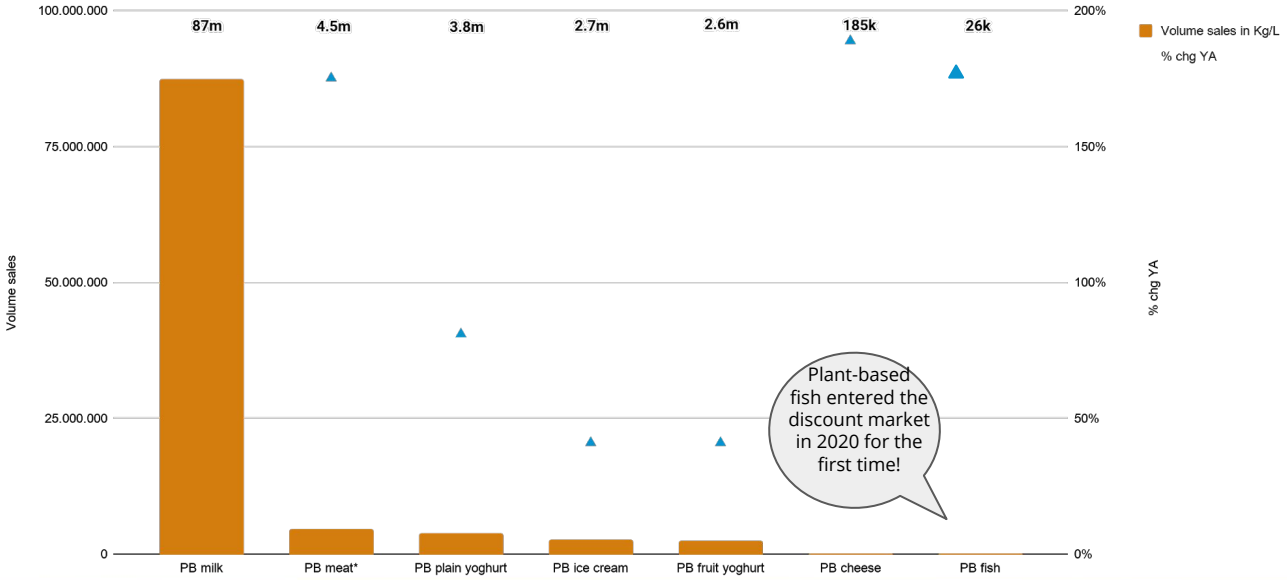
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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

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

Discounters' sales volume of plant-based food in Germany by category, in Kg/L, for MAT CW39 2020



*Only vegan

Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

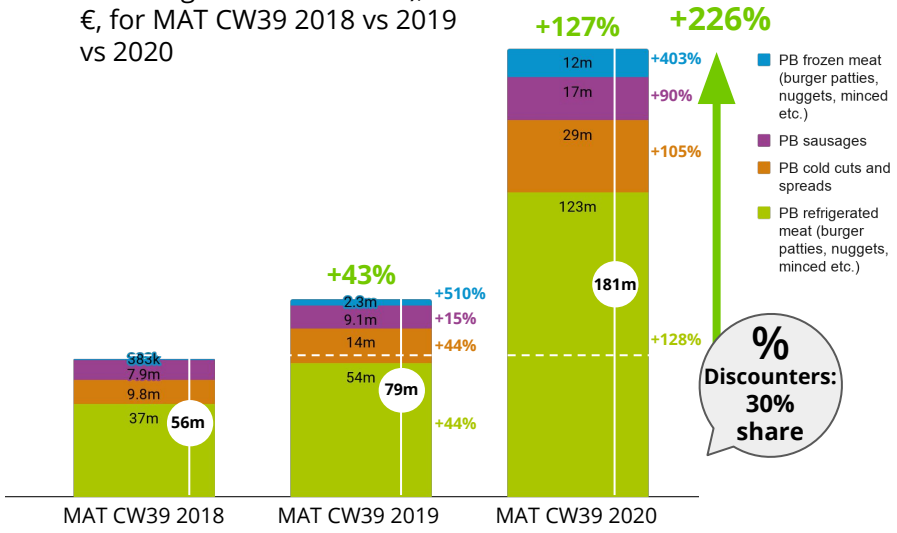
Plant-based sector deep dive: Germany

www.smartproteinproject.eu

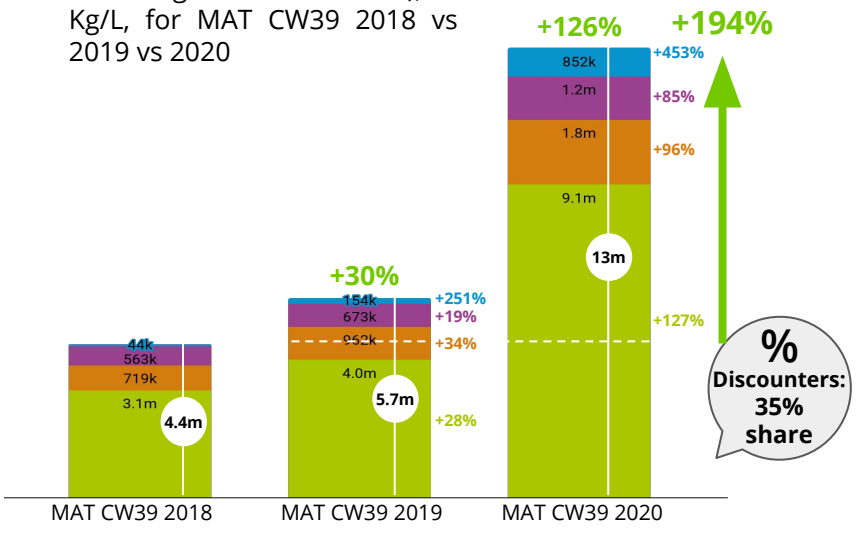
Plant-based sector deep dive: Germany
Total plant-based-meat sales

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

Sales value of plant-based meat* in Germany (grocery and drug incl. discounters), in €, for MAT CW39 2018 vs 2019 vs 2020



Sales volume of plant-based meat* in Germany (grocery and drug incl. discounters), in Kg/L, for MAT CW39 2018 vs 2019 vs 2020



*Only vegan

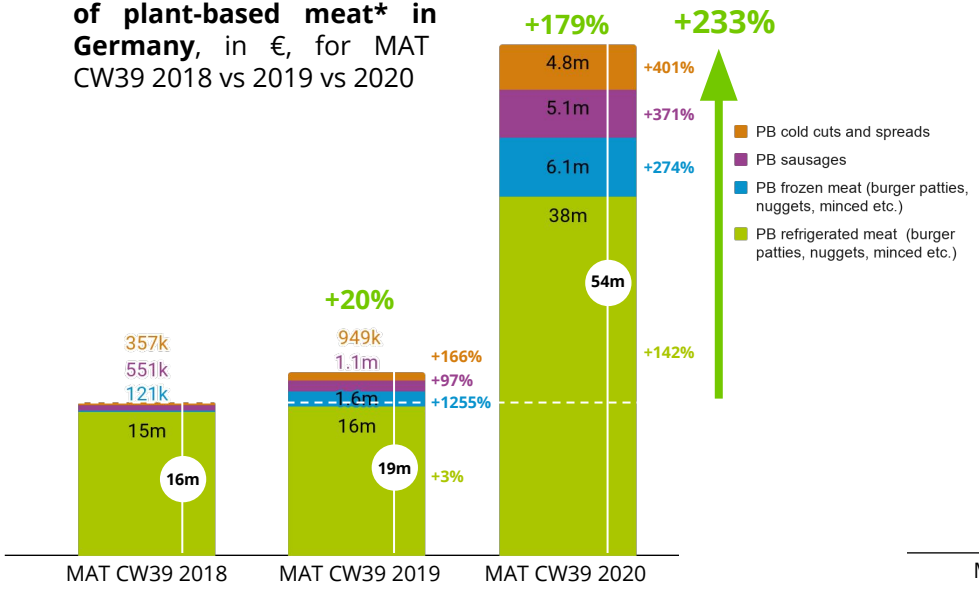
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

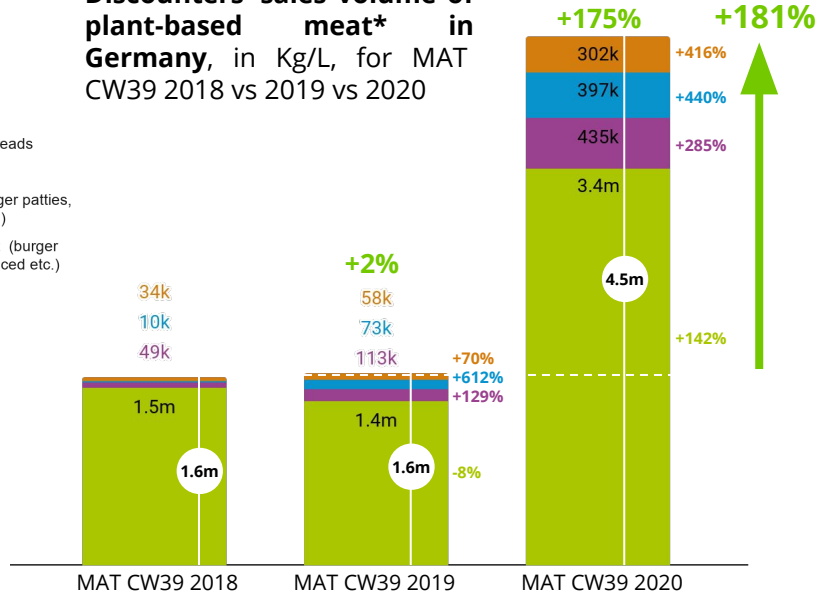
Plant-based sector deep dive: Germany
Discounters' plant-based-meat sales

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

Discounters' sales volume of plant-based meat* in Germany, in €, for MAT CW39 2018 vs 2019 vs 2020



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



*Only vegan

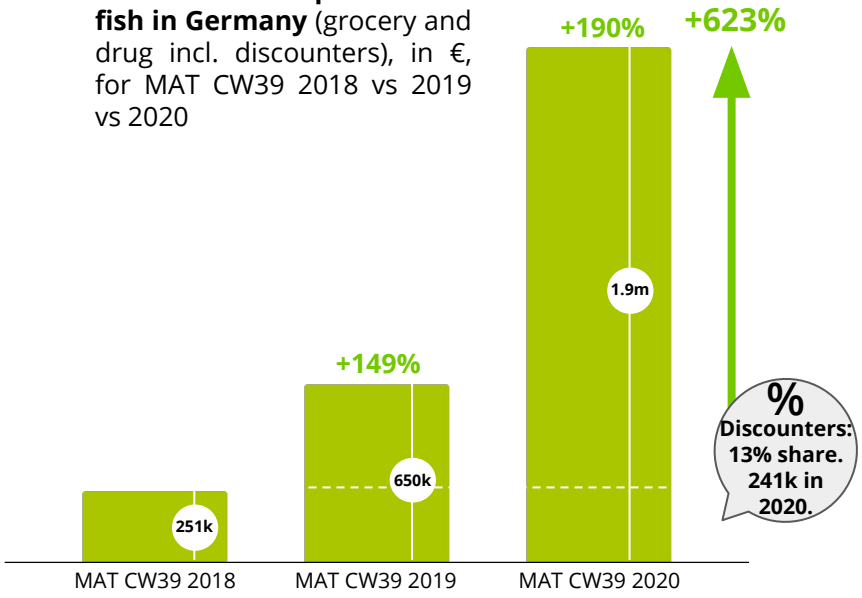
Source: Nielsen MarketTrack

MAT=Moving Annual Total

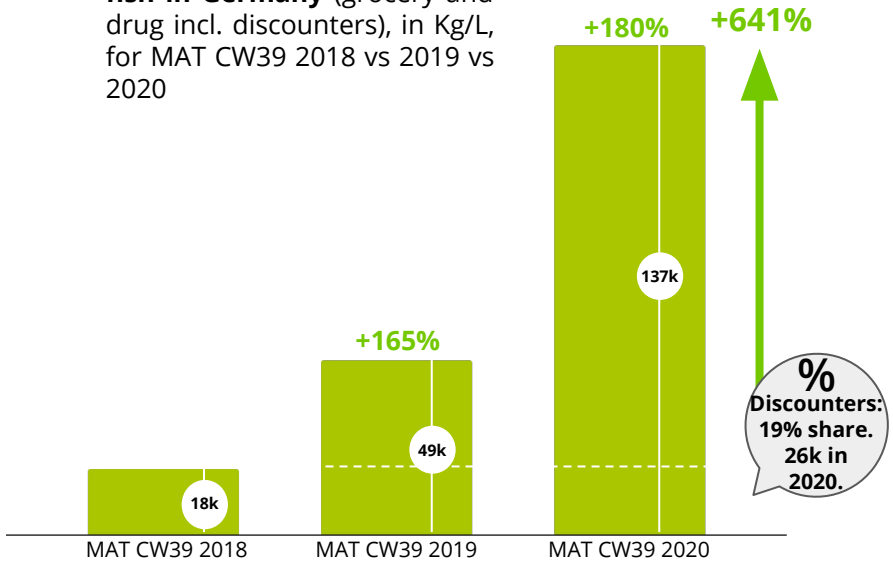
Plant-based sector deep dive: Germany
Total plant-based-fish sales

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

Sales value of plant-based fish in Germany (grocery and drug incl. discounters), in €, for MAT CW39 2018 vs 2019 vs 2020



Sales volume of plant-based fish in Germany (grocery and drug incl. discounters), in Kg/L, for MAT CW39 2018 vs 2019 vs 2020



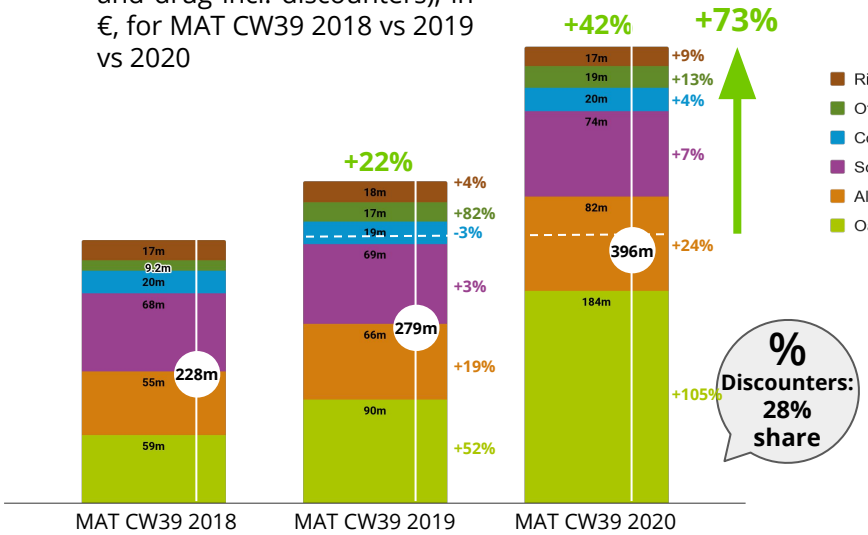
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

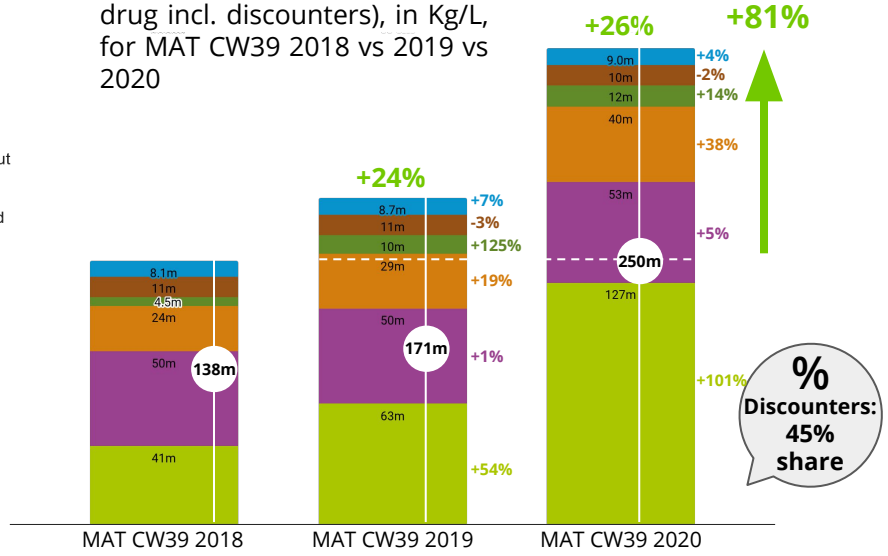
Plant-based sector deep dive: Germany
Total plant-based-milk sales

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

Sales value of plant-based milk in Germany (grocery and drug incl. discounters), in €, for MAT CW39 2018 vs 2019 vs 2020



Sales volume of plant-based milk in Germany (grocery and drug incl. discounters), in Kg/L, for MAT CW39 2018 vs 2019 vs 2020



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

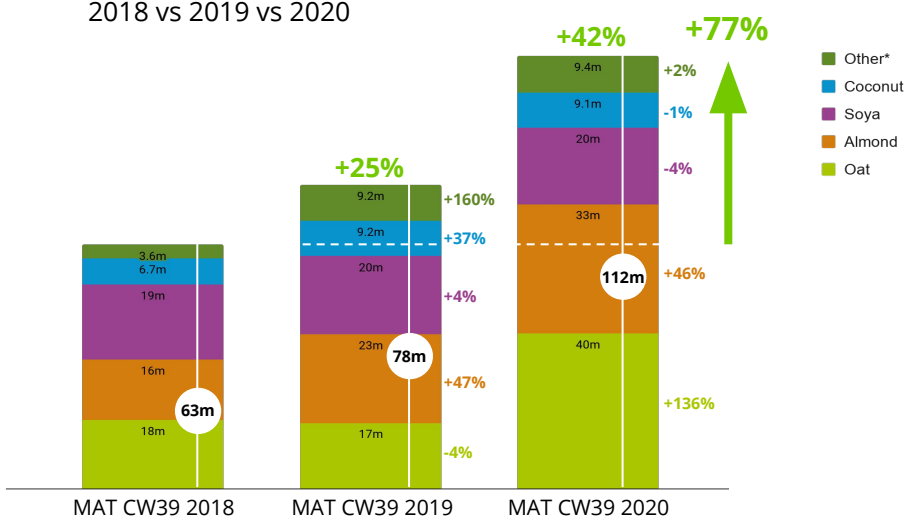
Source: Nielsen MarketTrack

MAT=Moving Annual Total

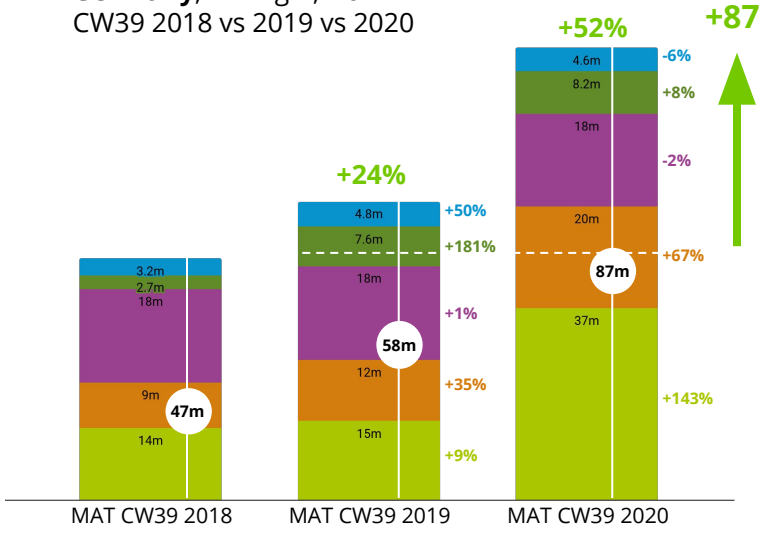
Plant-based sector deep dive: Germany
Discounters' plant-based milk sales

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

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



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



*Other includes rice, cashew, spelt, and others

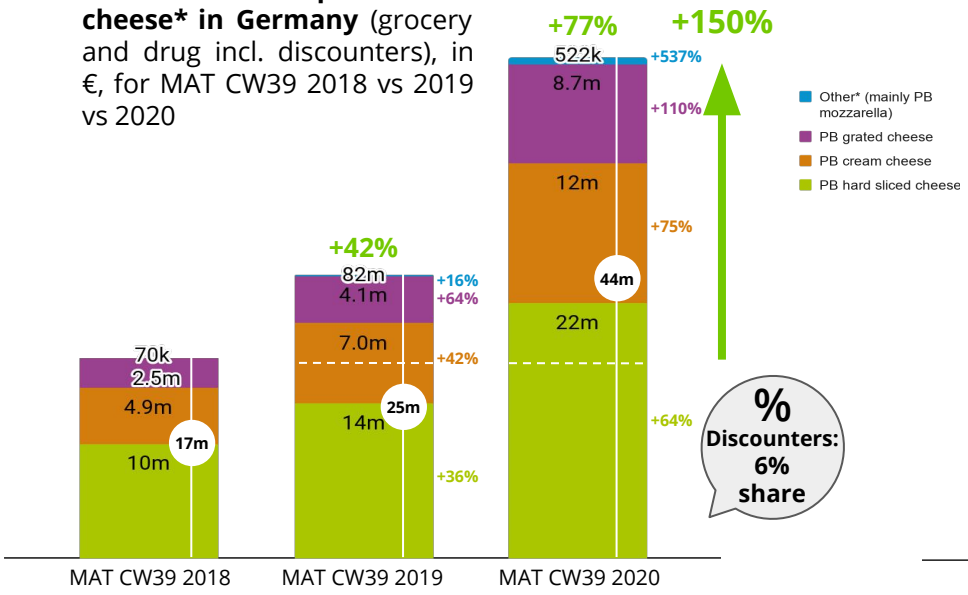
Source: Nielsen MarketTrack

MAT=Moving Annual Total

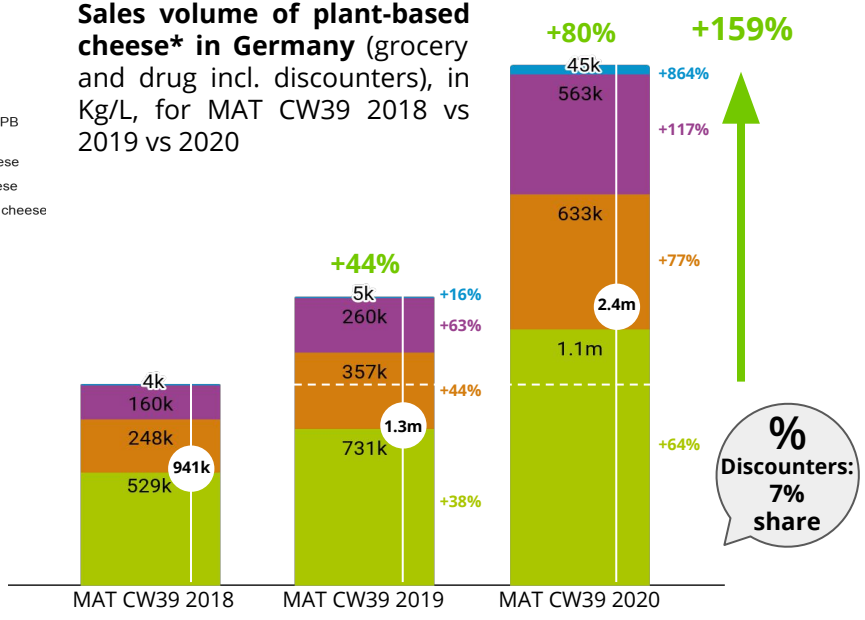
Plant-based sector deep dive: Germany
Total plant-based cheese sales

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

Sales value of plant-based cheese* in Germany (grocery and drug incl. discounters), in €, for MAT CW39 2018 vs 2019 vs 2020



Sales volume of plant-based cheese* in Germany (grocery and drug incl. discounters), in Kg/L, for MAT CW39 2018 vs 2019 vs 2020



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

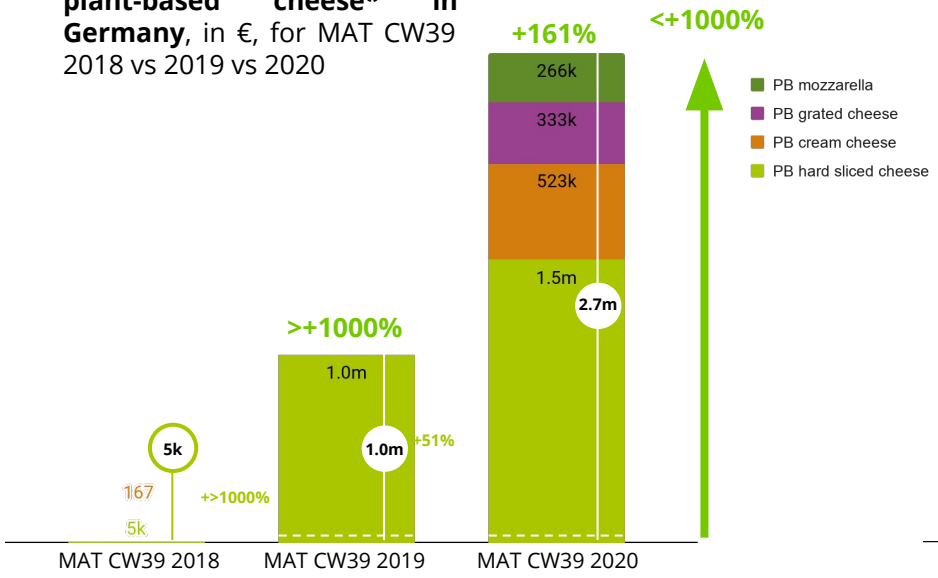
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

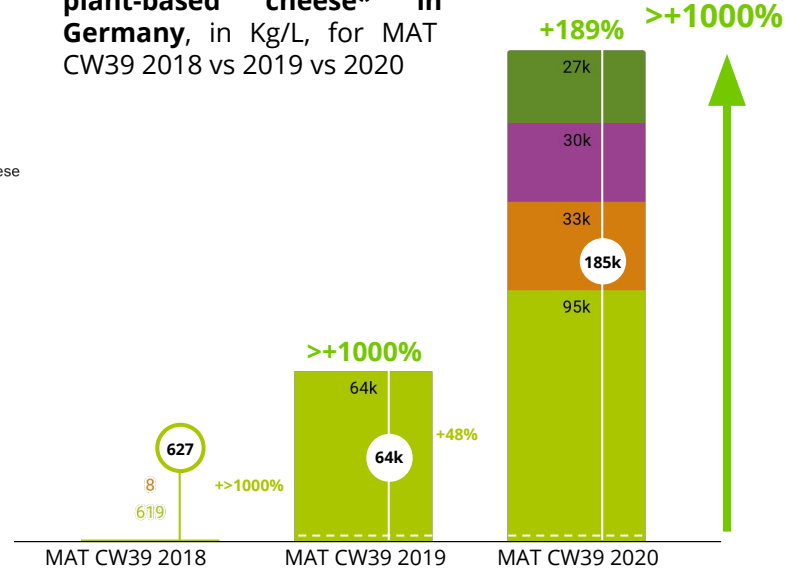
Plant-based sector deep dive: Germany
Discounters' plant-based cheese sales

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

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



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



*All self-service

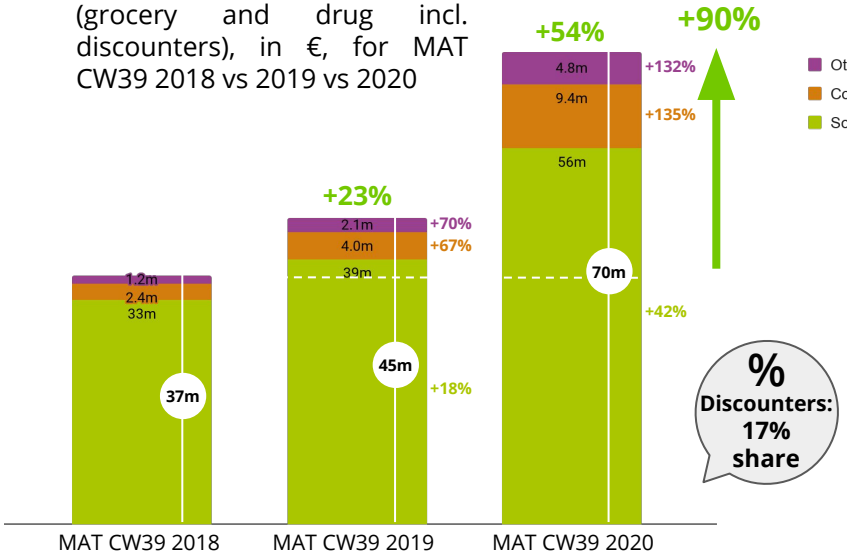
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

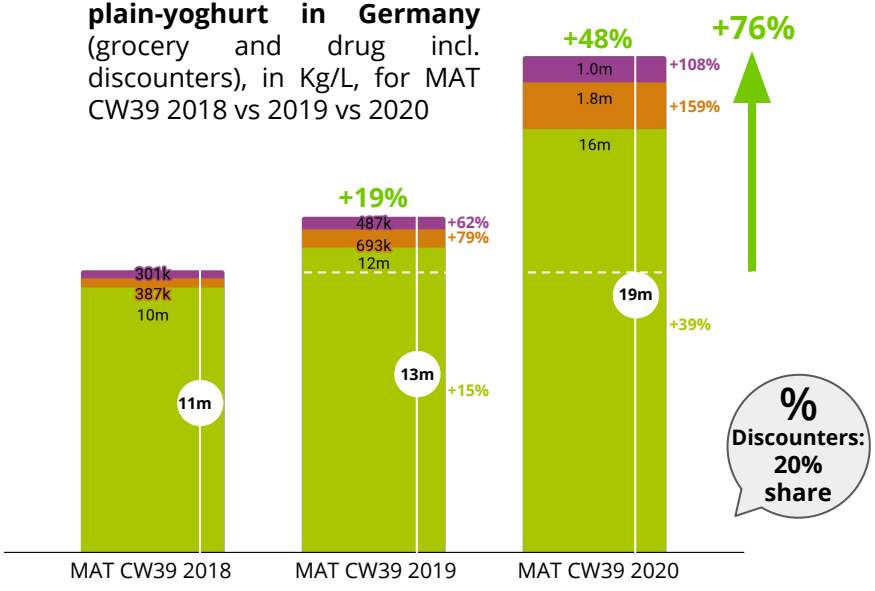
Plant-based sector deep dive: Germany
Total plant-based plain-yoghurt sales

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

Sales value of plant-based plain-yoghurt in Germany (grocery and drug incl. discounters), in €, for MAT CW39 2018 vs 2019 vs 2020



Sales volume of plant-based plain-yoghurt in Germany (grocery and drug incl. discounters), in Kg/L, for MAT CW39 2018 vs 2019 vs 2020



*Other includes lupine, almond, and cashew

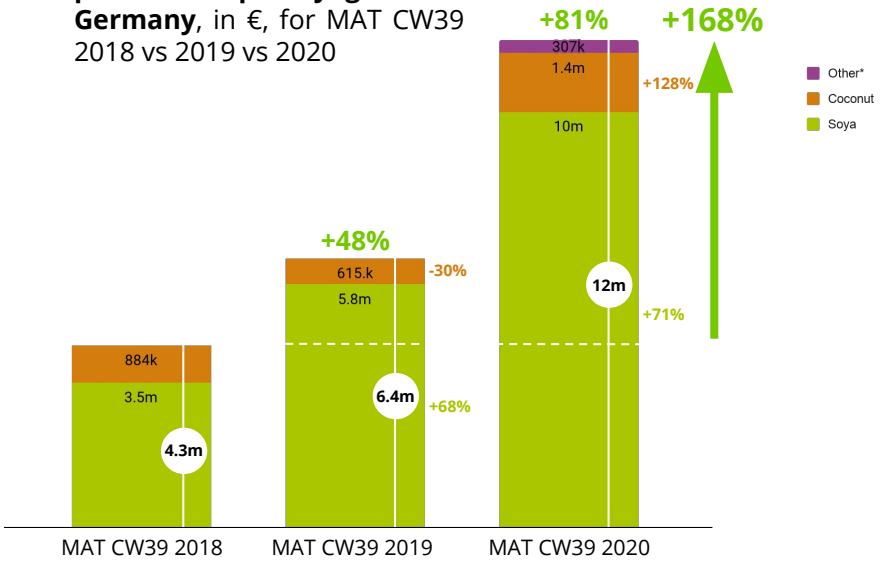
Source: Nielsen MarketTrack

MAT=Moving Annual Total

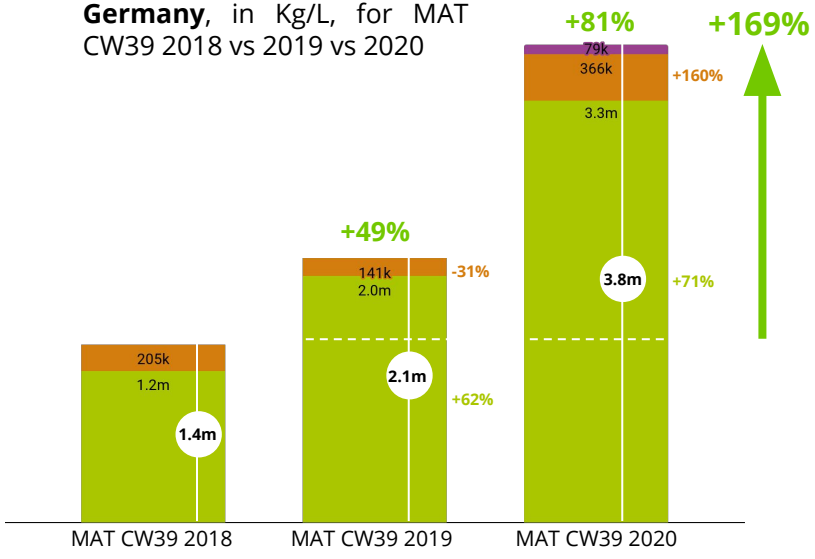
Plant-based sector deep dive: Germany
Discounters' PB plain-yoghurt sales

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

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



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



*Includes almond, lupine, cashew, and oat

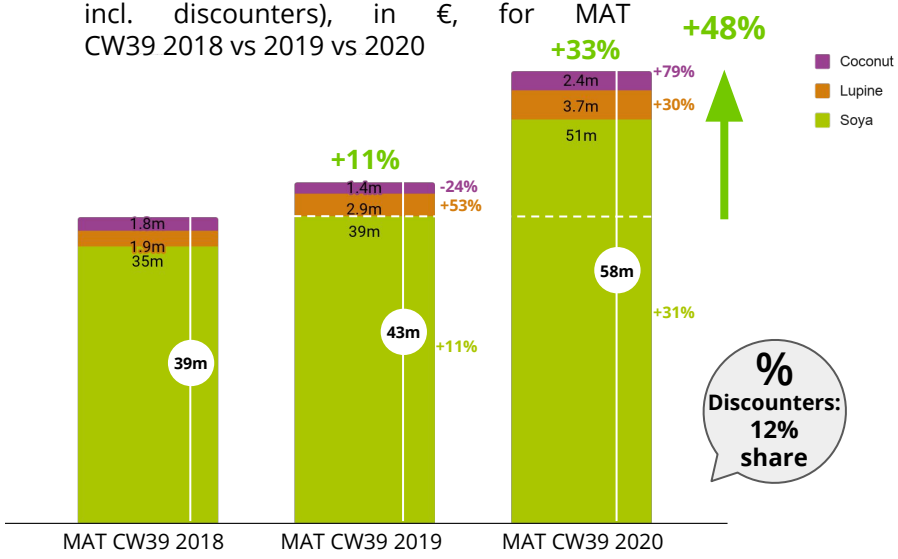
Source: Nielsen MarketTrack

MAT=Moving Annual Total

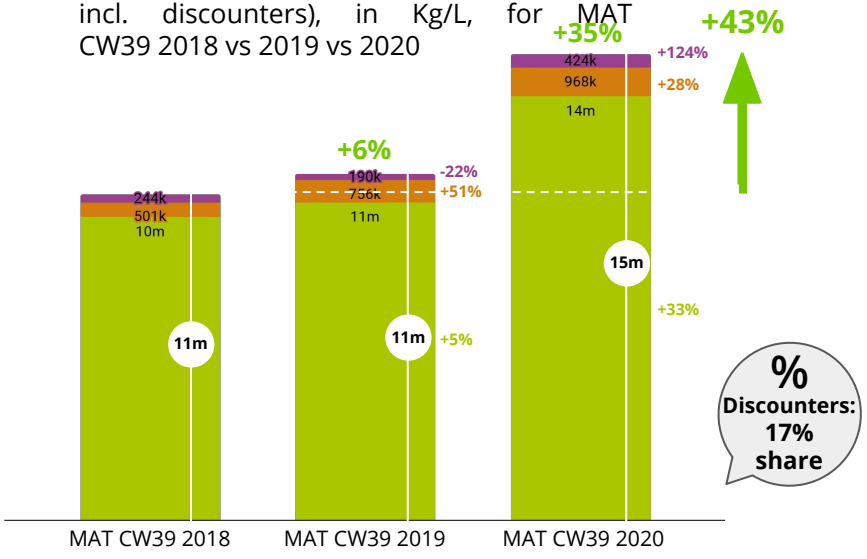
Plant-based sector deep dive: Germany
Total plant-based flavoured-yoghurt sales

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

Sales value of plant-based flavoured yoghurt* in Germany (grocery and drug incl. discounters), in €, for MAT CW39 2018 vs 2019 vs 2020



Sales volume of plant-based flavoured yoghurt* in Germany (grocery and drug incl. discounters), in Kg/L, for MAT CW39 2018 vs 2019 vs 2020



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

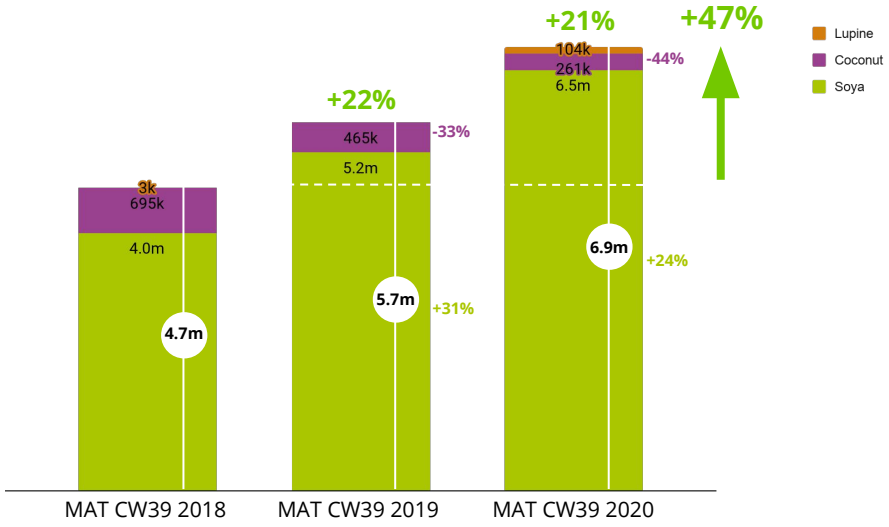
Source: Nielsen MarketTrack

MAT=Moving Annual Total

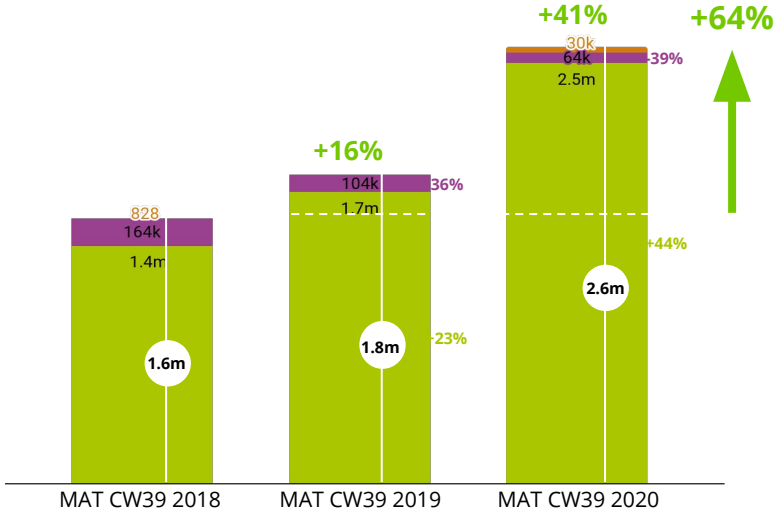
Plant-based sector deep dive: Germany
Discounters' PB flavoured-yoghurt sales

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

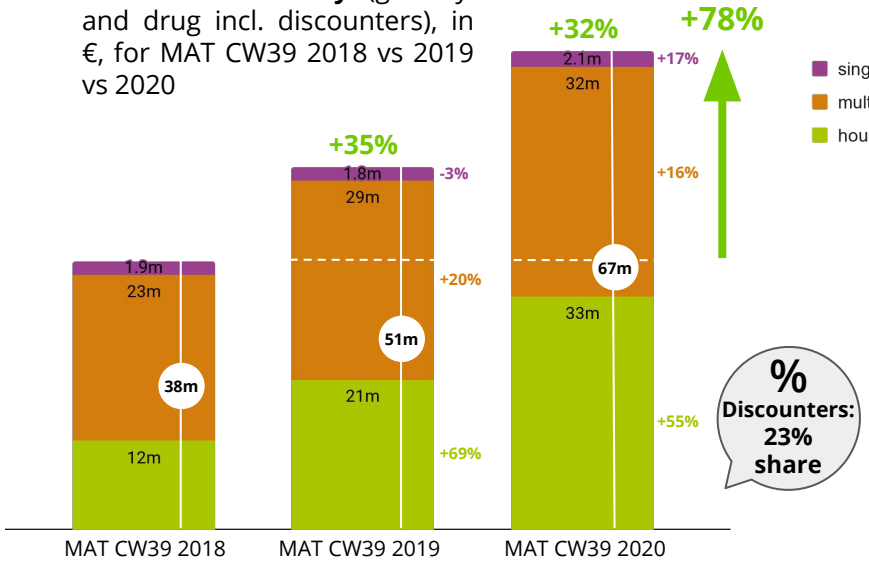
Source: Nielsen MarketTrack

MAT=Moving Annual Total

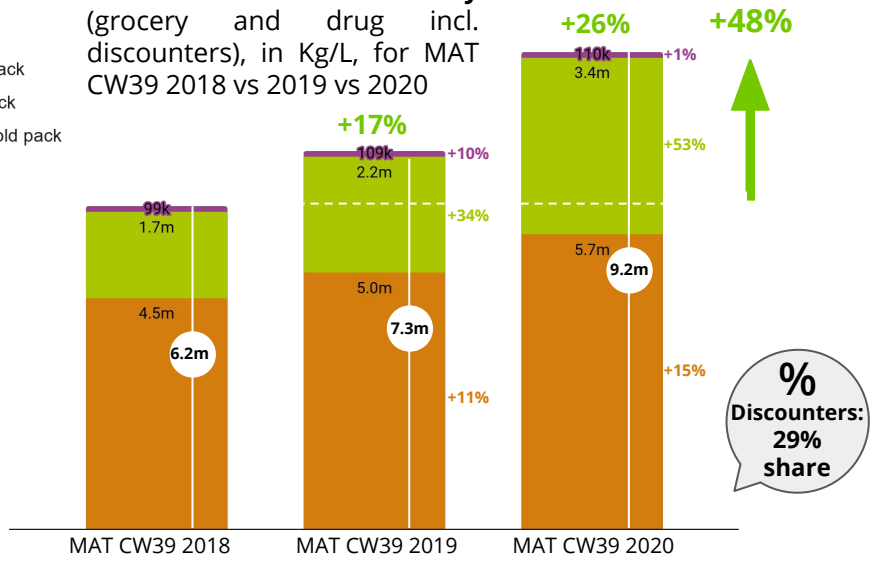
Plant-based sector deep dive: Germany
Total plant-based ice cream sales

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

Sales value of plant-based ice cream in Germany (grocery and drug incl. discounters), in €, for MAT CW39 2018 vs 2019 vs 2020



Sales volume of plant-based ice cream in Germany (grocery and drug incl. discounters), in Kg/L, for MAT CW39 2018 vs 2019 vs 2020



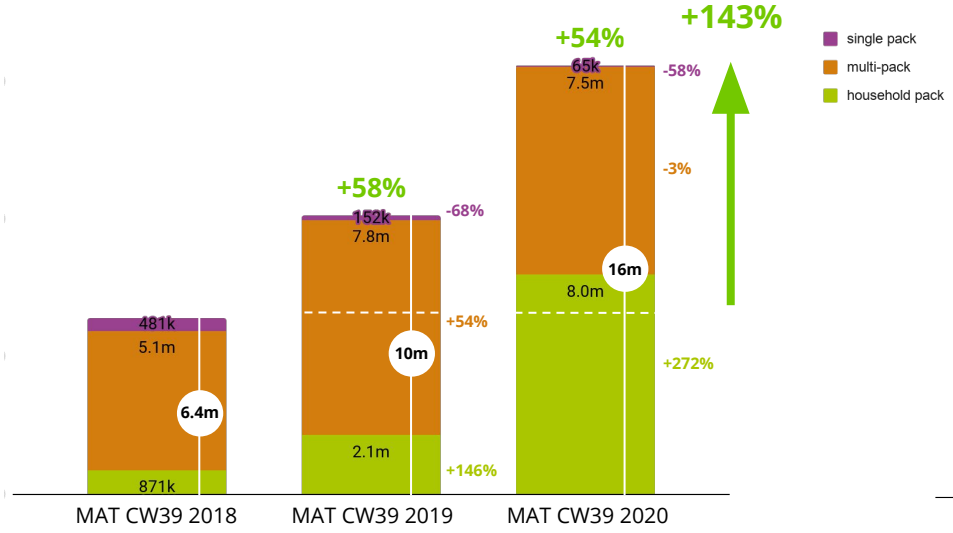
Source: Nielsen MarketTrack

MAT=Moving Annual Total

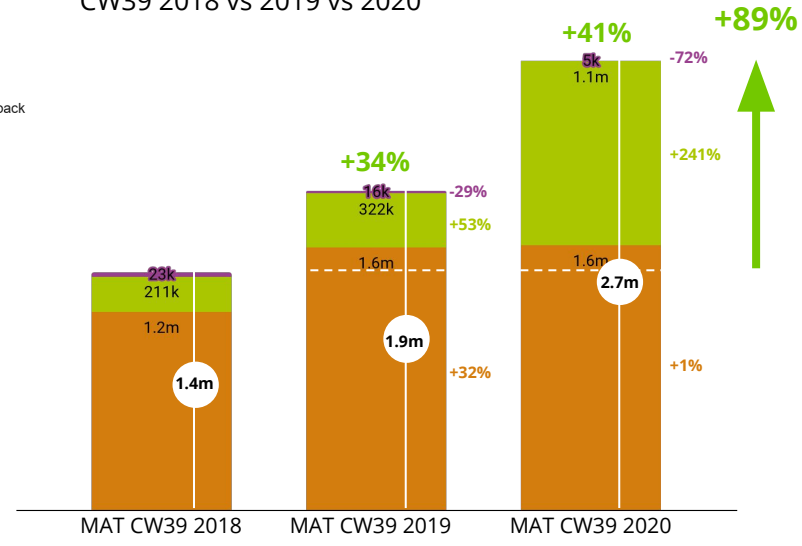
Plant-based sector deep dive: Germany
Discounters' plant-based ice cream sales

In discount stores, household packs showed even stronger growth.

Discounters' sales value of plant-based ice cream in Germany, in €, for MAT CW39 2018 vs 2019 vs 2020



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



Source: Nielsen MarketTrack

MAT=Moving Annual Total

smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

Italy

www.smartproteinproject.eu

Agenda – 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'.

Source: Nielsen MarketTrack

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.

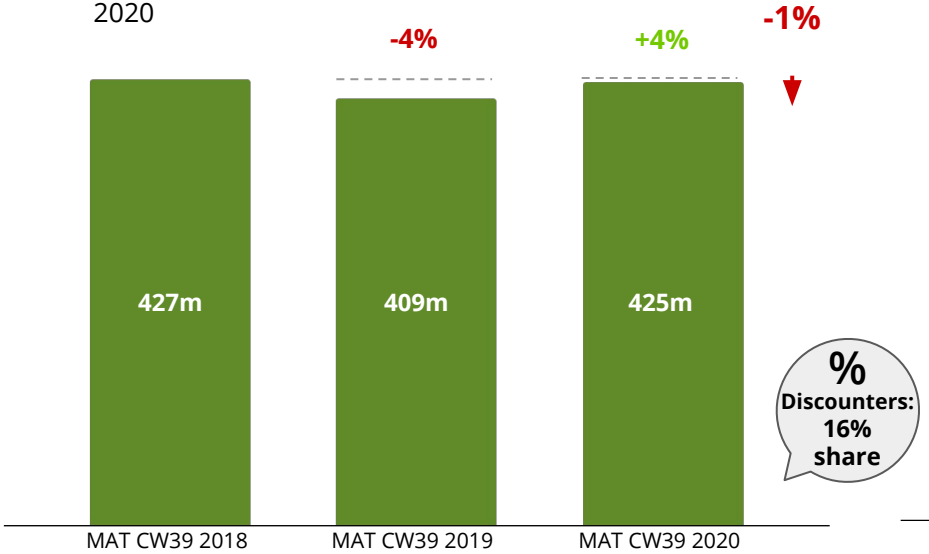
*Includes plant-based meat (vegan and vegetarian), plant-based milk, plant-based yoghurt, plant-based cheese, plant-based ice cream; all numbers refer to MAT CW39 2020 if not stated otherwise

Source: Nielsen MarketTrack

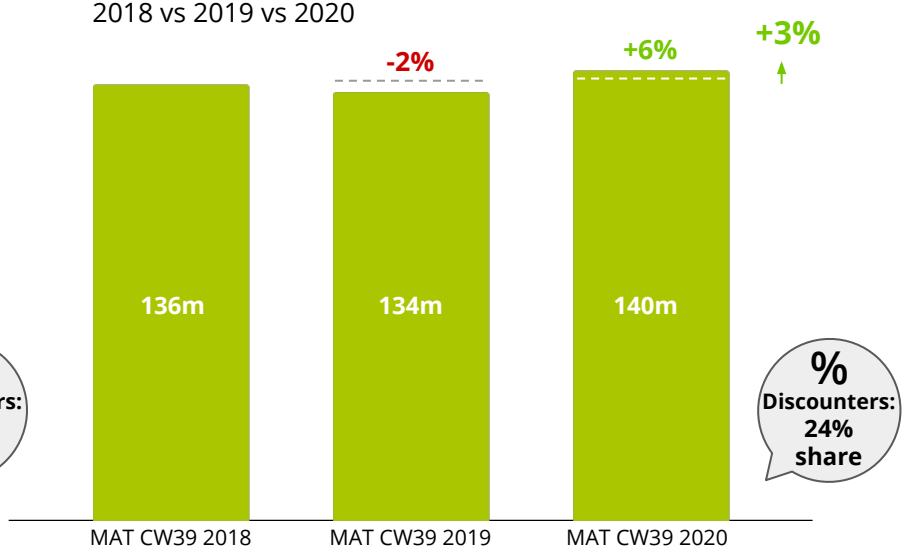
Plant-based sector overview: Italy
Total sales value and sales volume

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

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



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



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

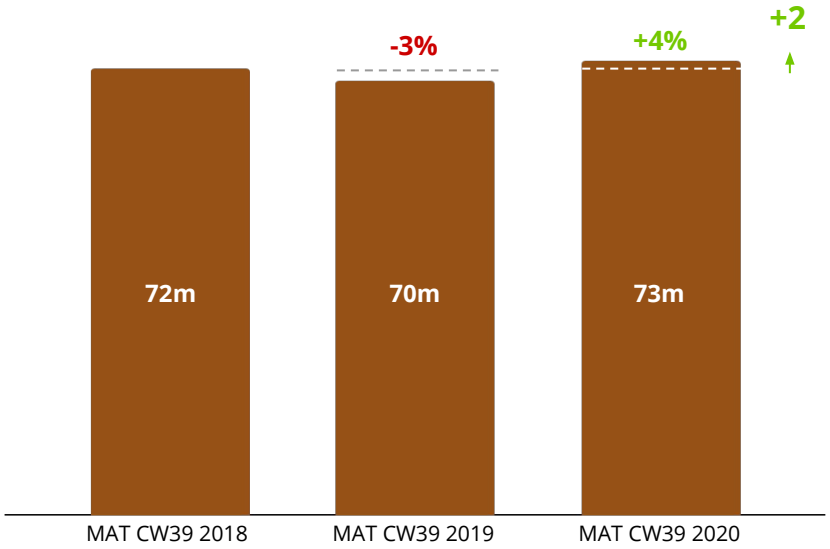
Source: Nielsen MarketTrack

MAT=Moving Annual Total

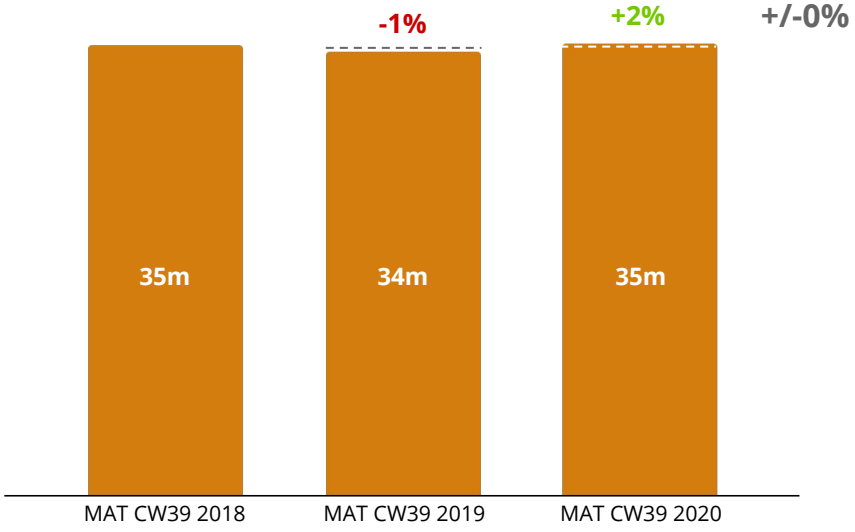
Plant-based sector overview: Italy
Discounters' sales value and sales volume

A similar picture is evident in discount stores.

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



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



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

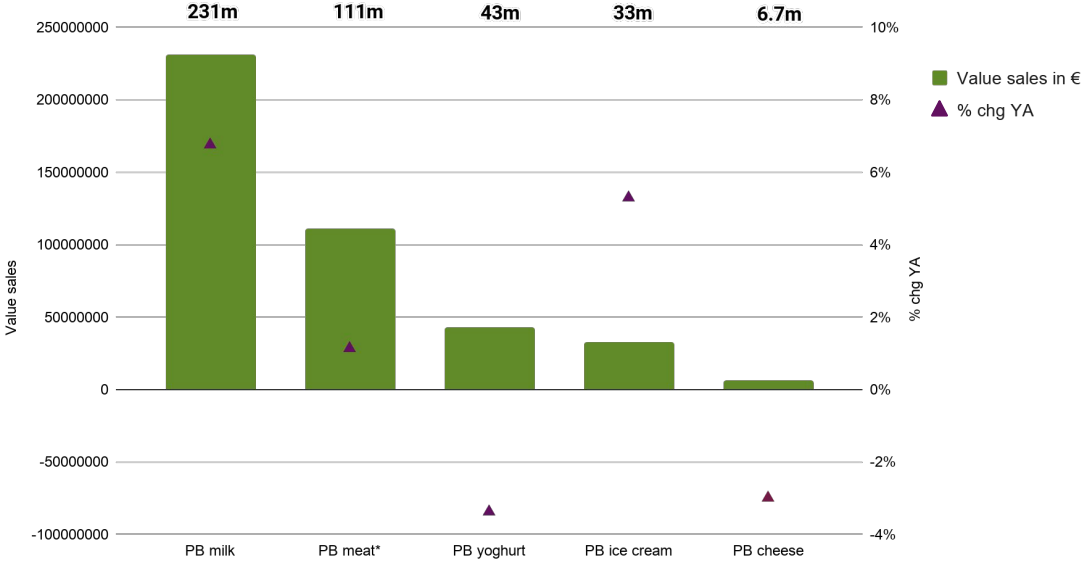
Source: Nielsen MarketTrack

MAT=Moving Annual Total

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.

Sales value of plant-based food in Italy (total incl. discounters) by category, in €, for MAT CW39 2020



*Vegan and vegetarian

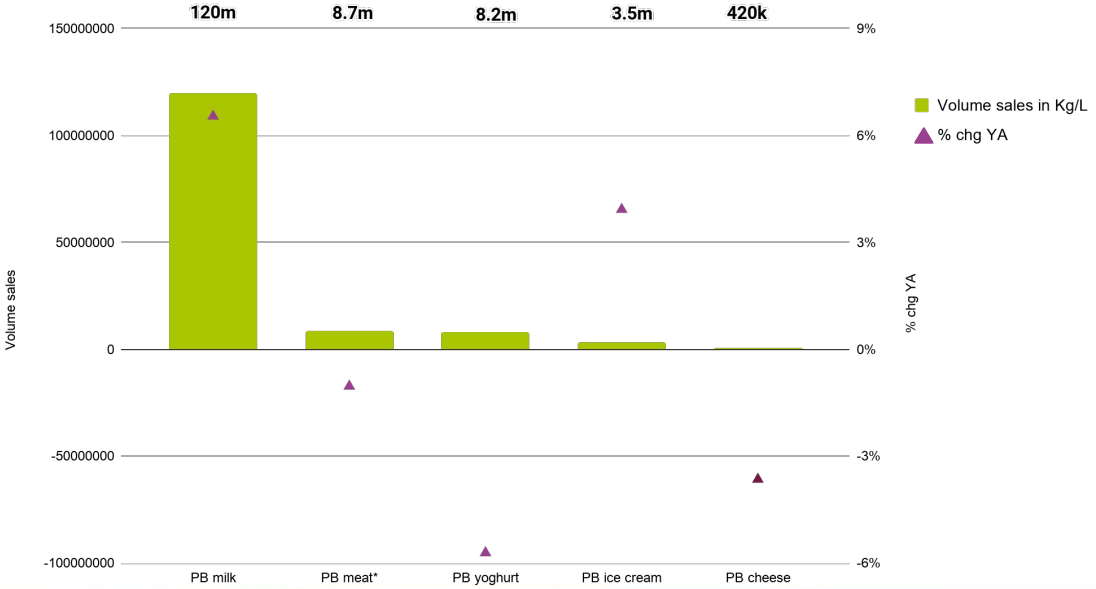
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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.

Sales volume of plant-based food in Italy (total incl. discounters) by category, in Kg/L, for MAT CW39 2020



*Vegan and vegetarian

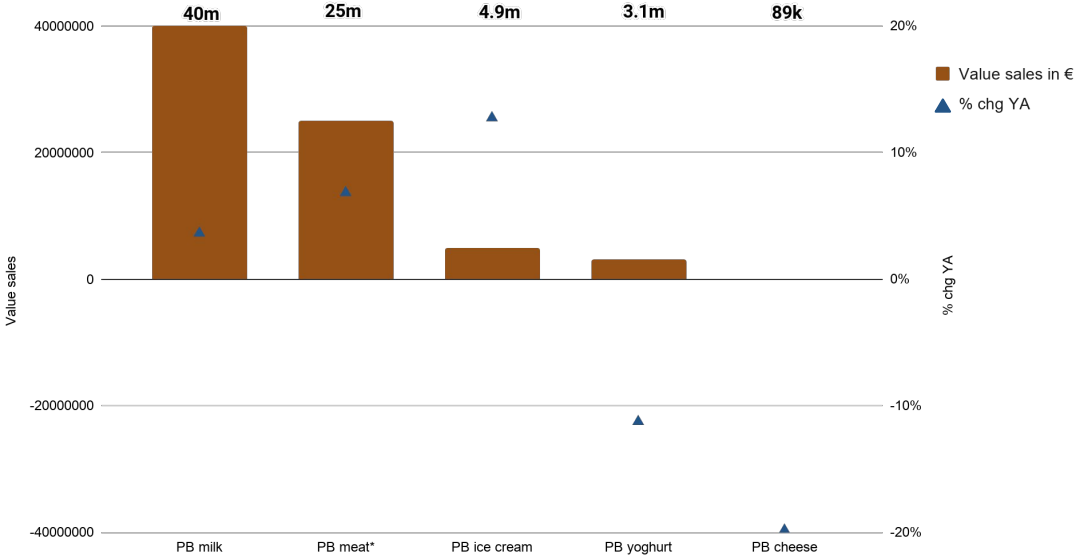
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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

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

Discounters' sales value of plant-based food in Italy by category, in €, for MAT CW39 2020



*Vegan and vegetarian

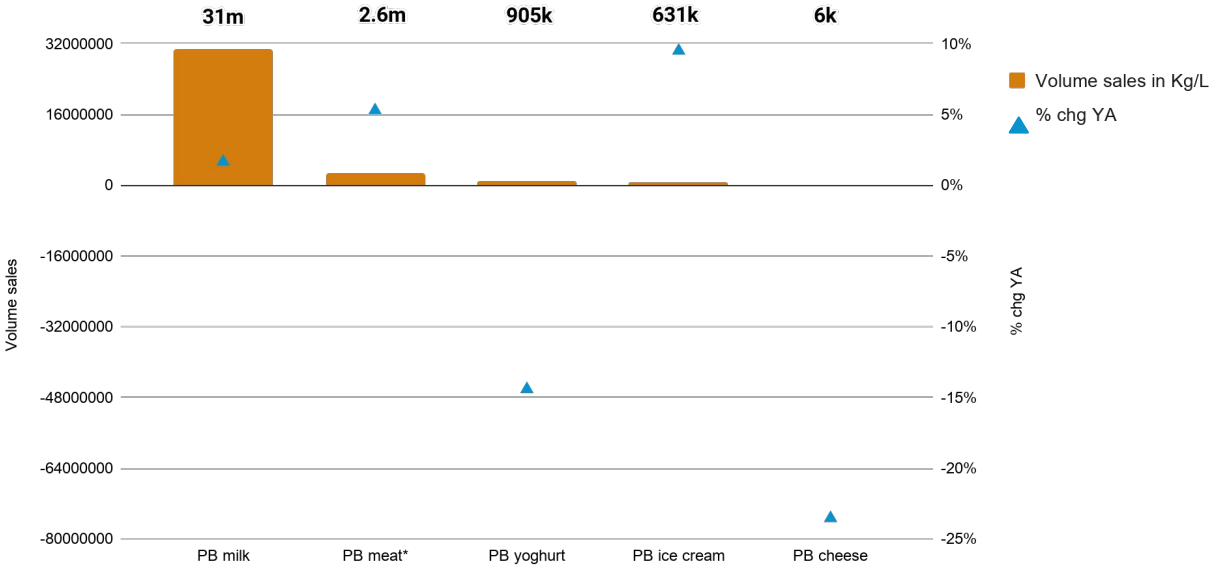
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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

A similar picture emerges in terms of sales volume.

Discounters' sales volume of plant-based food in Italy by category, in Kg/L, for MAT CW39 2020



*Vegan and vegetarian

Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

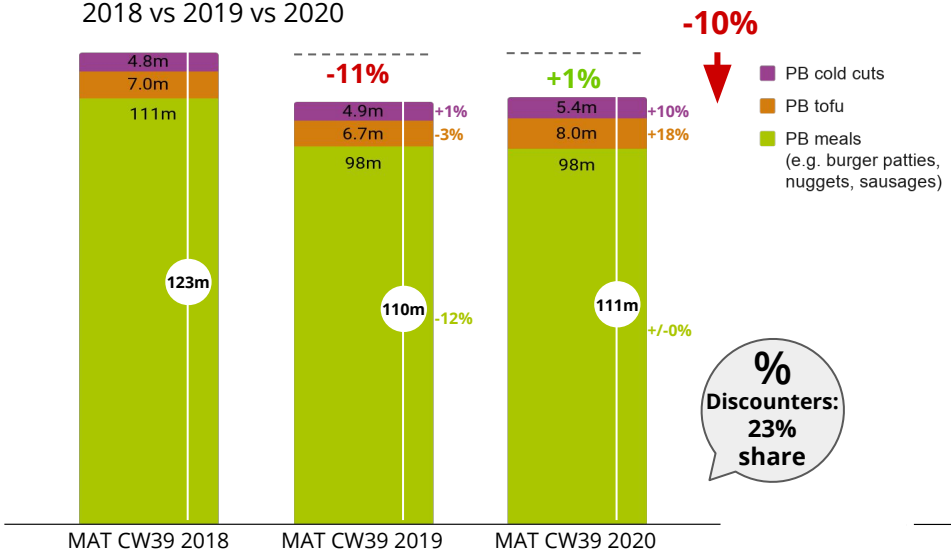
Plant-based sector deep dive: Italy

www.smartproteinproject.eu

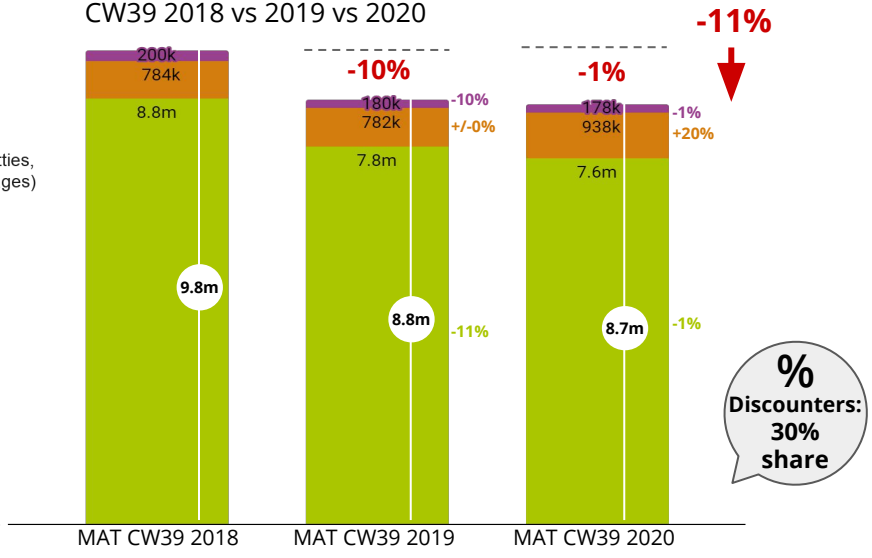
Plant-based sector deep dive: Italy
Total plant-based-meat sales

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

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



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



*Vegan and vegetarian

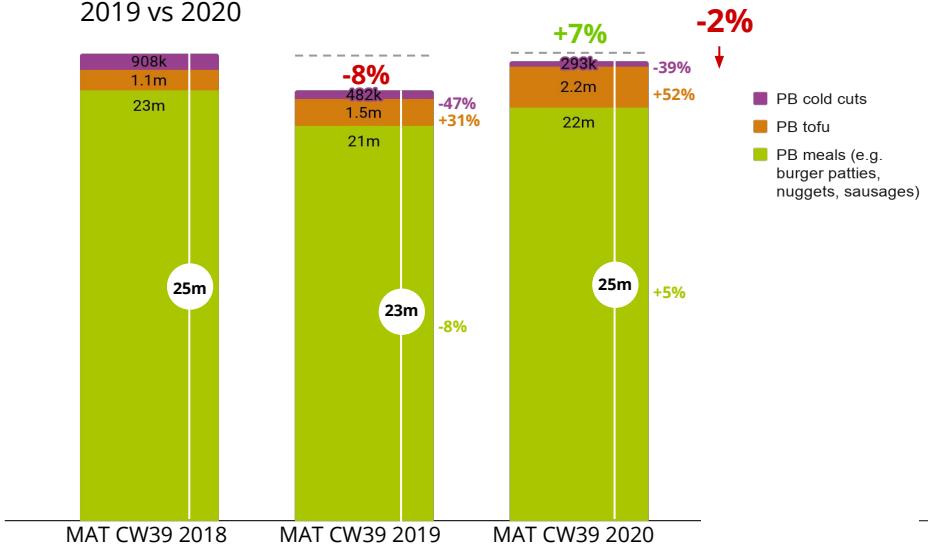
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

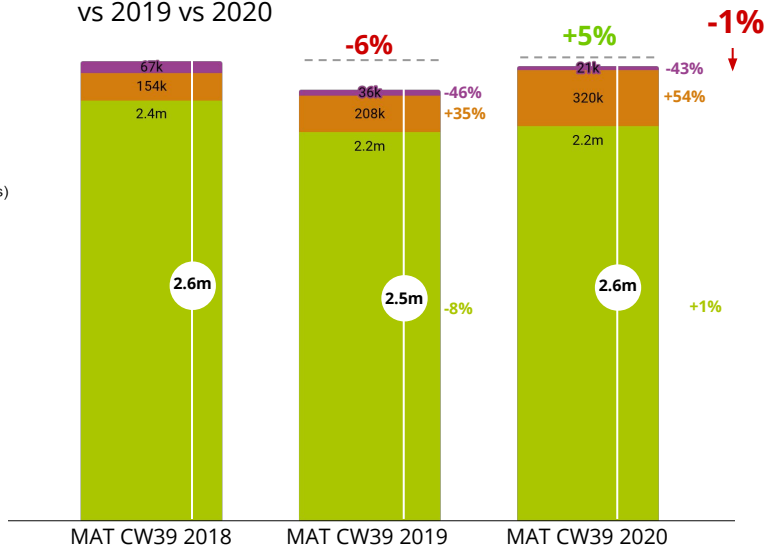
Plant-based sector deep dive: Italy
Discounters' plant-based-meat sales

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

Discounters' sales volume of plant-based meat* in Italy, in €, for MAT CW39 2018 vs 2019 vs 2020



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



*Vegan and vegetarian

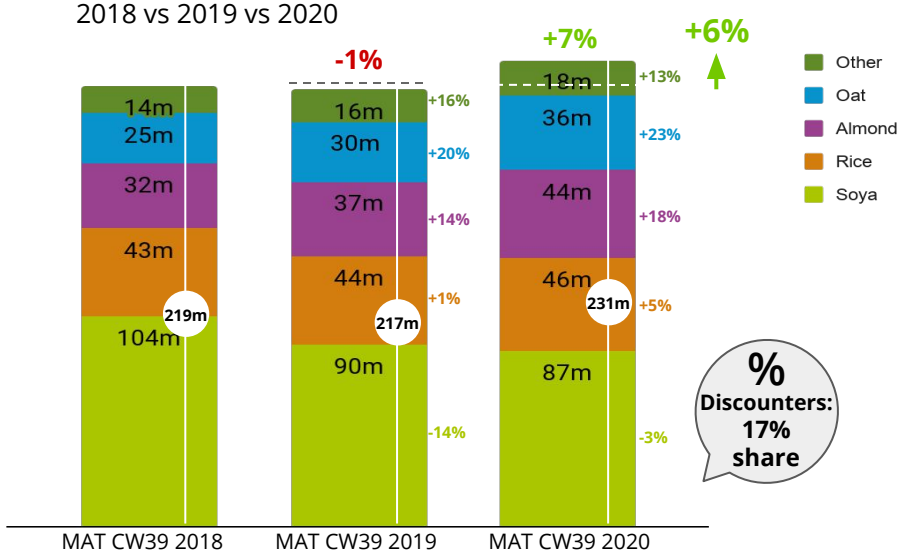
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

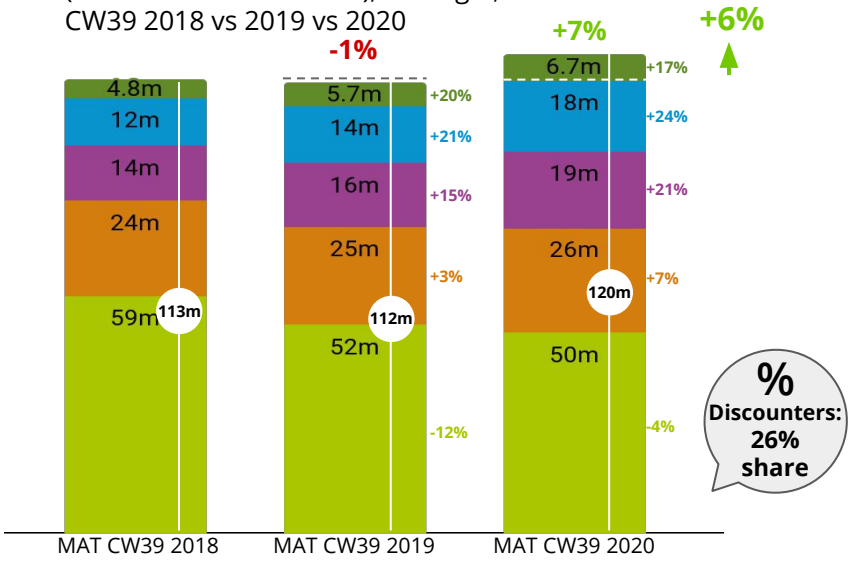
Plant-based sector deep dive: Italy
Total plant-based-milk sales

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

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



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



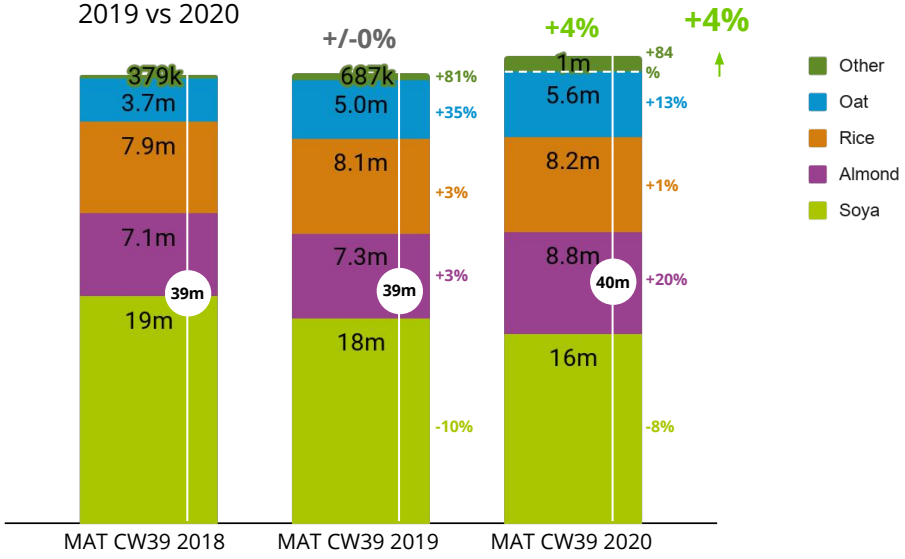
Source: Nielsen MarketTrack

MAT=Moving Annual Total

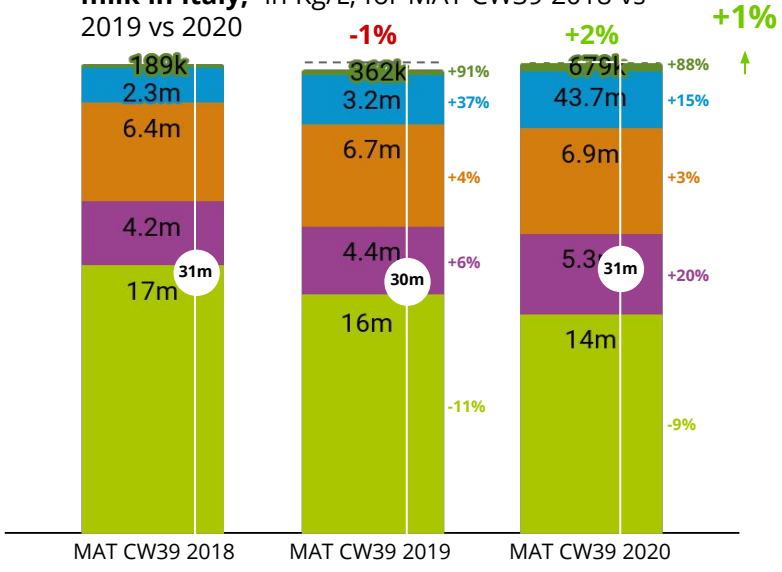
Plant-based sector deep dive: Italy
Discounters' plant-based-milk sales

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

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



Discounters' sales volume of plant-based milk in Italy, in Kg/L, for MAT CW39 2018 vs 2019 vs 2020



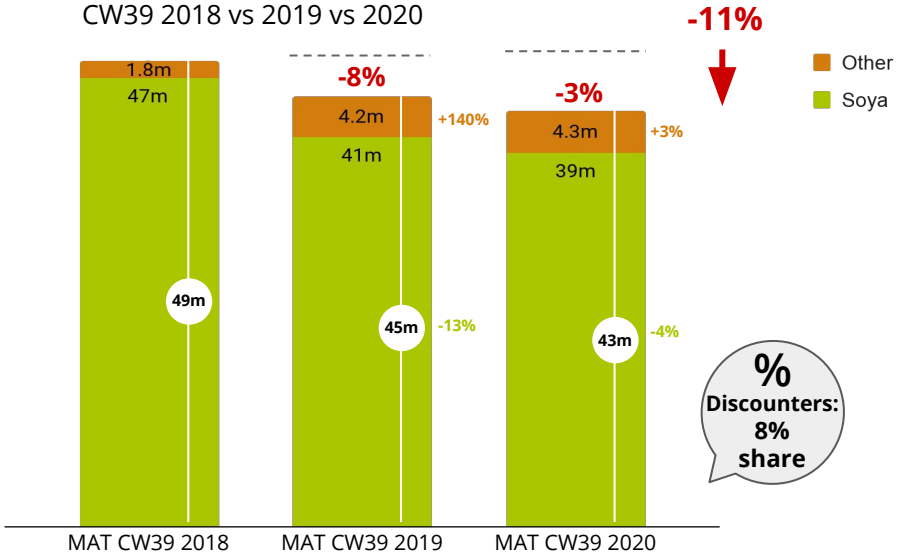
Source: Nielsen MarketTrack

MAT=Moving Annual Total

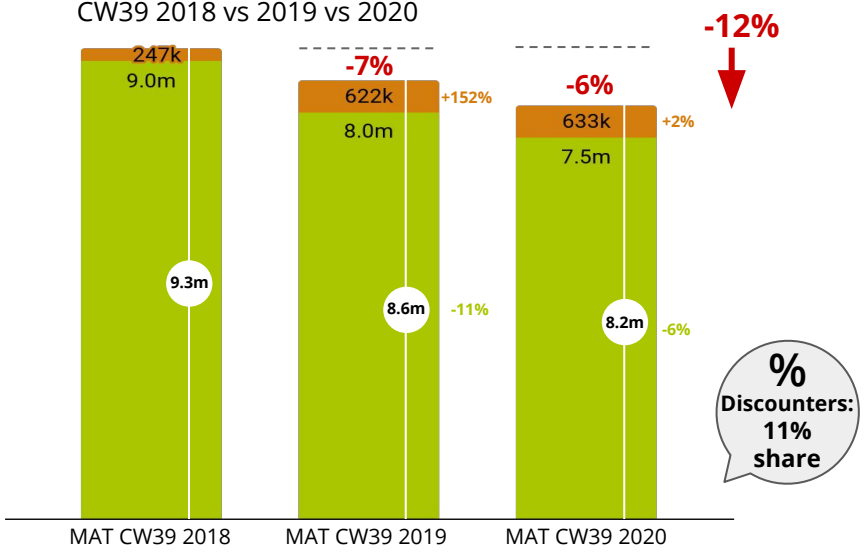
Plant-based sector deep dive: Italy
Total plant-based-yoghurt sales

Sales decreased, with the decline driven by soya.

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



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



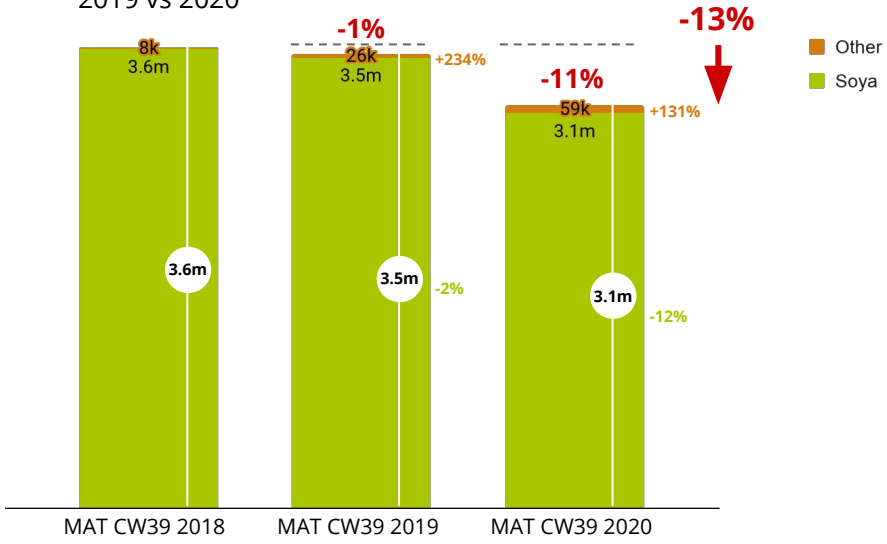
Source: Nielsen MarketTrack

MAT=Moving Annual Total

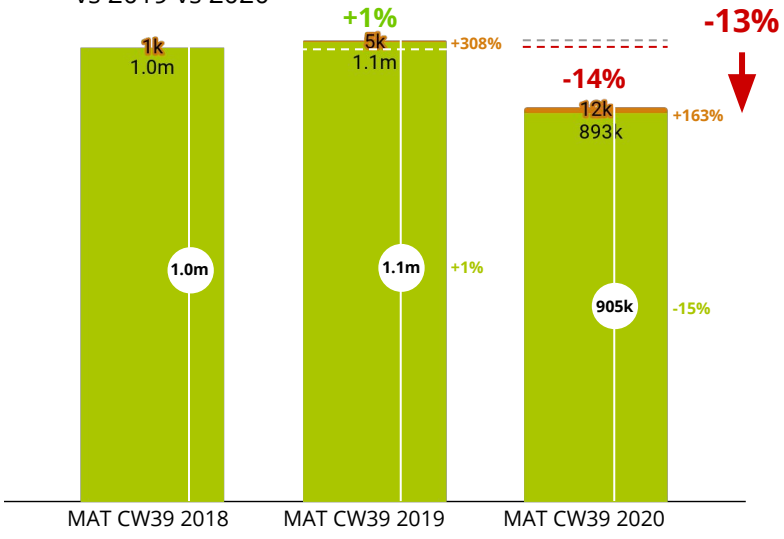
Plant-based sector deep dive: Italy
Discounters' plant-based-yoghurt sales

A similar picture is evident in discount stores.

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



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



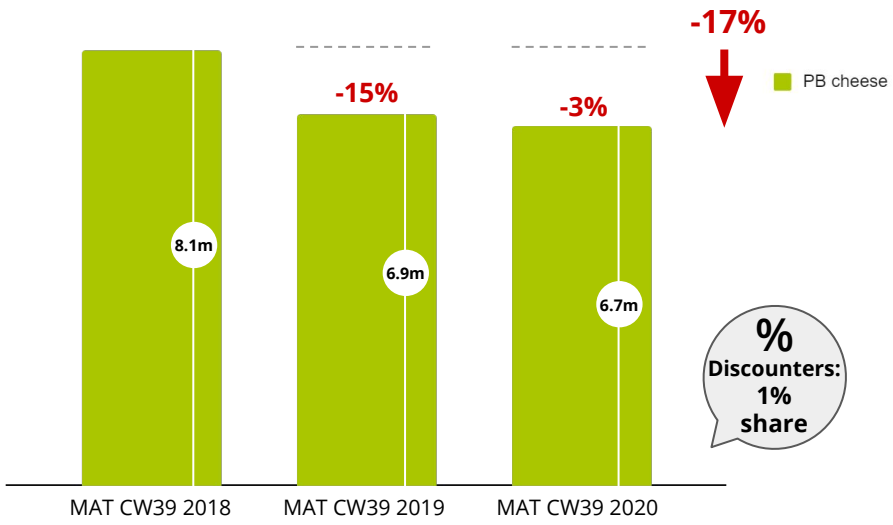
Source: Nielsen MarketTrack

MAT=Moving Annual Total

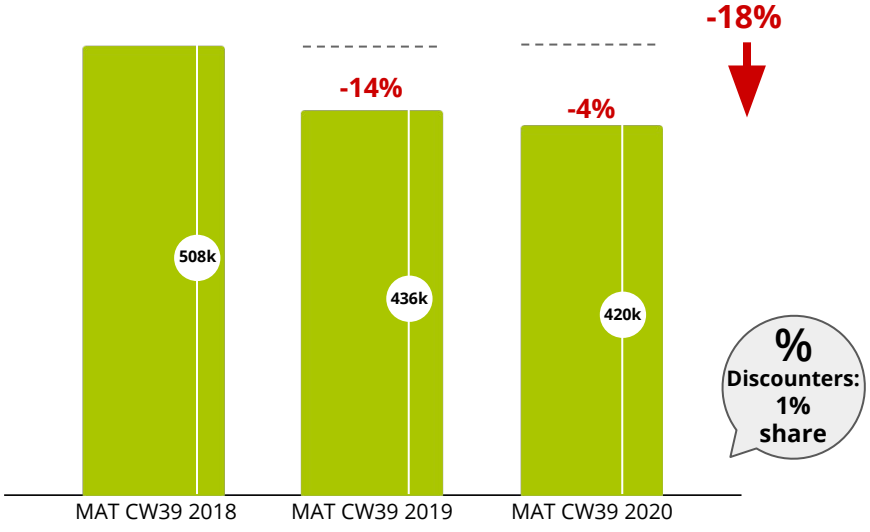
Plant-based sector deep dive: Italy
Total plant-based-cheese sales

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



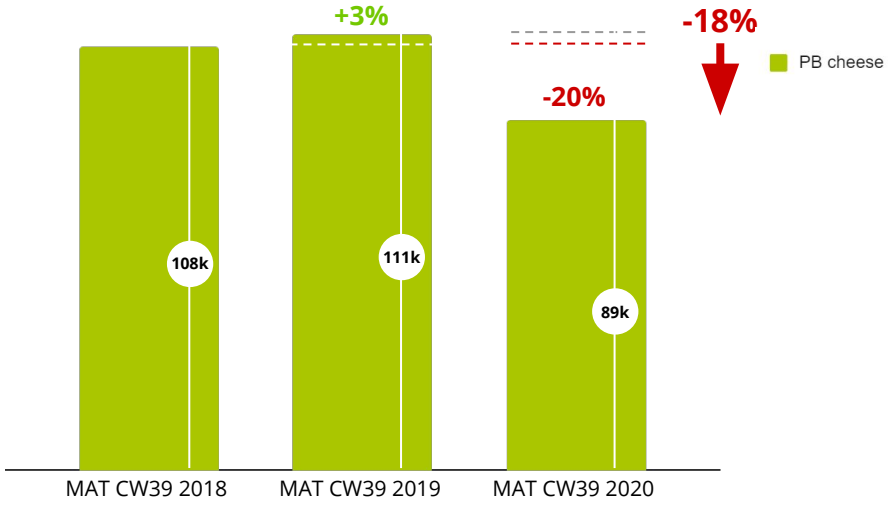
Source: Nielsen MarketTrack

MAT=Moving Annual Total

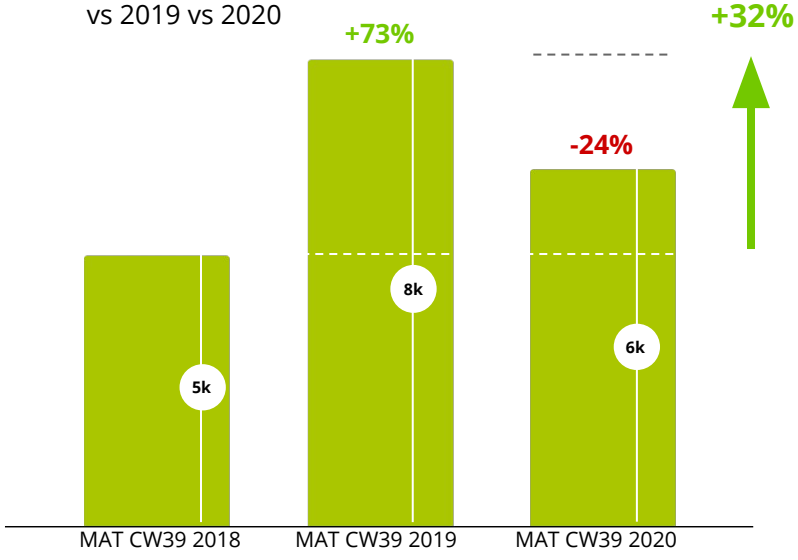
Plant-based sector deep dive: Italy
Discounters' plant-based-cheese sales

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



Discounters' sales volume of plant-based cheese in Italy, in Kg/L, for MAT CW39 2018 vs 2019 vs 2020



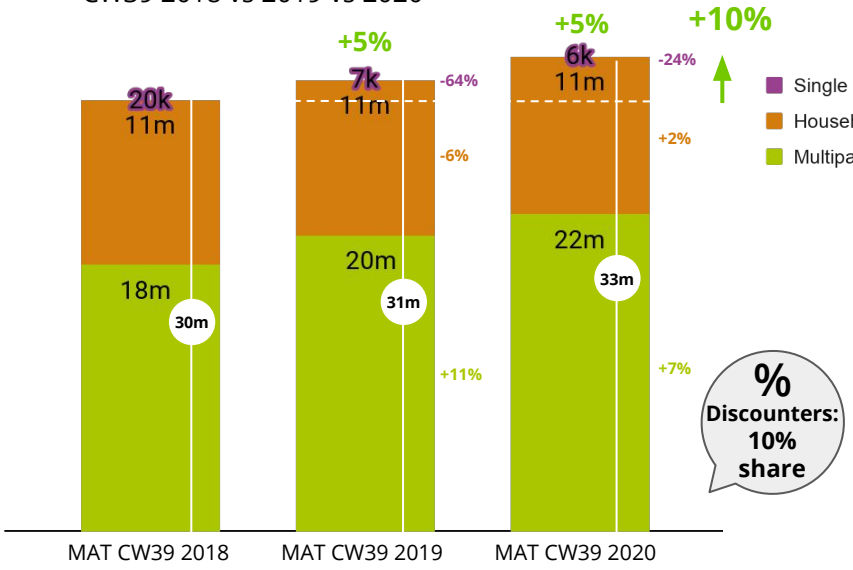
Source: Nielsen MarketTrack

MAT=Moving Annual Total

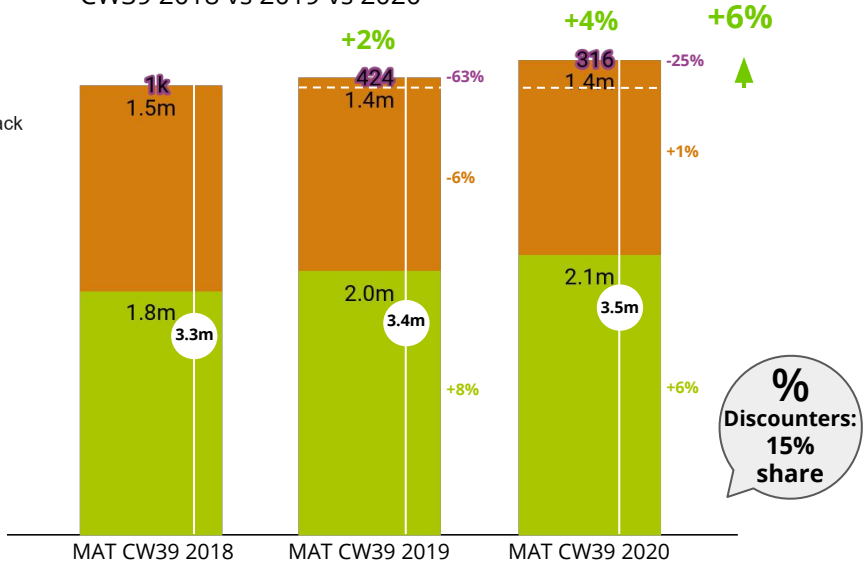
Plant-based sector deep dive: Italy
Total plant-based ice cream sales

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

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



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



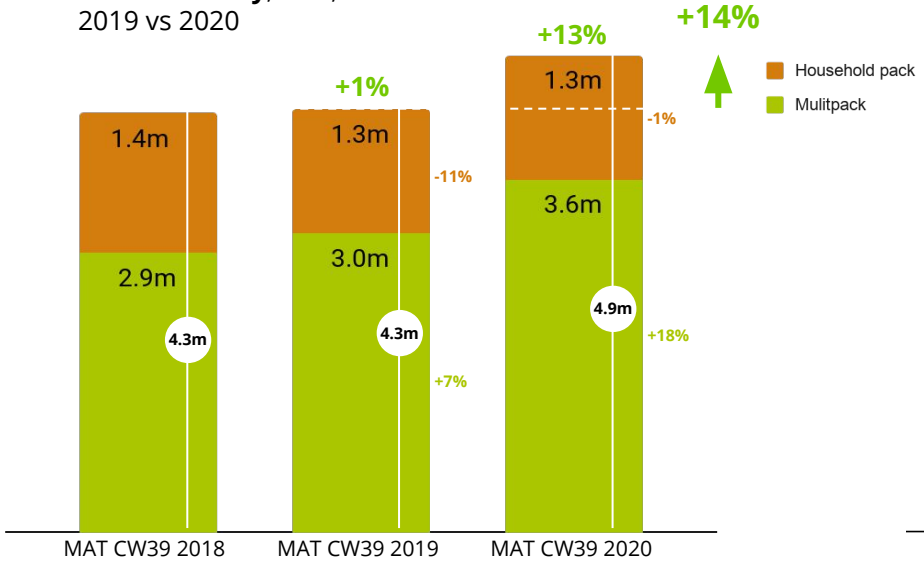
Source: Nielsen MarketTrack

MAT=Moving Annual Total

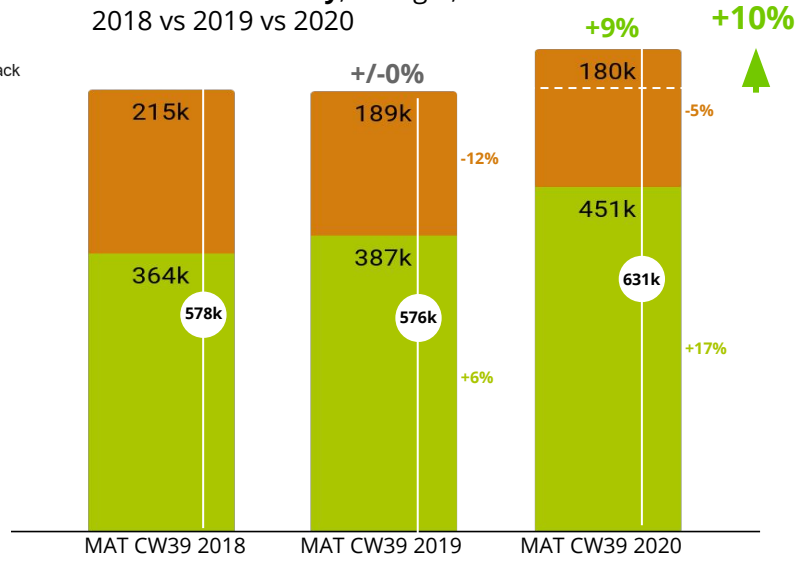
Plant-based sector deep dive: Italy
Discounters' plant-based ice cream sales

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

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



Discounters' sales volume of plant-based ice cream in Italy, in Kg/L, for MAT CW39 2018 vs 2019 vs 2020



Source: Nielsen MarketTrack

MAT=Moving Annual Total

smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

The Netherlands

www.smartproteinproject.eu

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’.

Source: Nielsen MarketTrack

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).

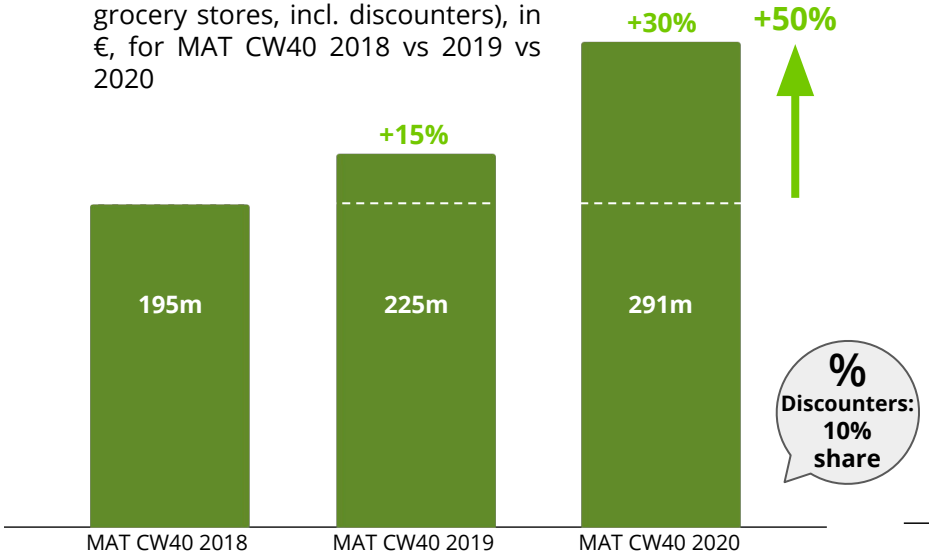
*Includes:plant-based meat (vegan and vegetarian), plant-based milk, plant-based cheese, plant-based yoghurt. All numbers refer to MAT CW40 2020 if not stated otherwise

Source: Nielsen MarketTrack

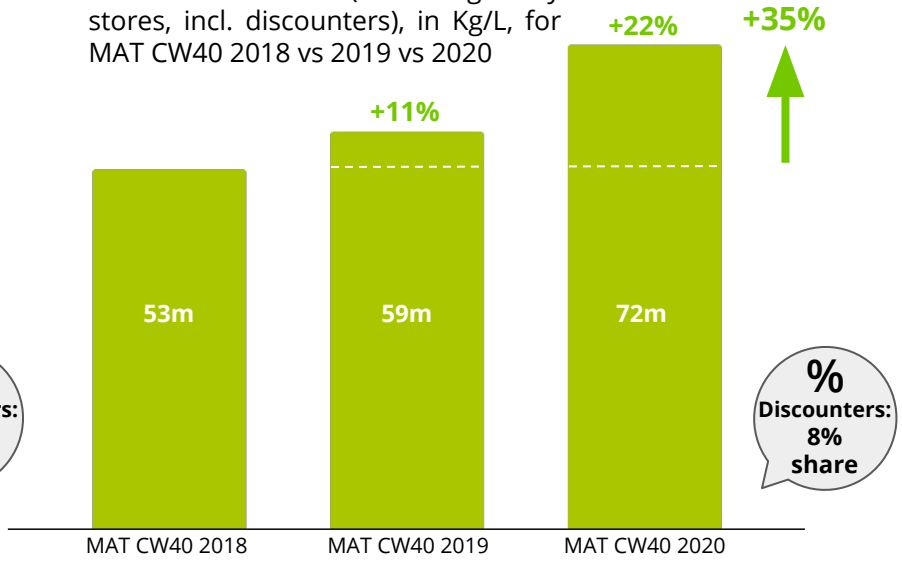
Plant-based sector overview: The Netherlands
Total sales value and sales volume

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

Sales value of plant-based food* in the Netherlands (total for grocery stores, incl. discounters), in €, for MAT CW40 2018 vs 2019 vs 2020



Sales volume of plant-based food* in the Netherlands (total for grocery stores, incl. discounters), in Kg/L, for MAT CW40 2018 vs 2019 vs 2020



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

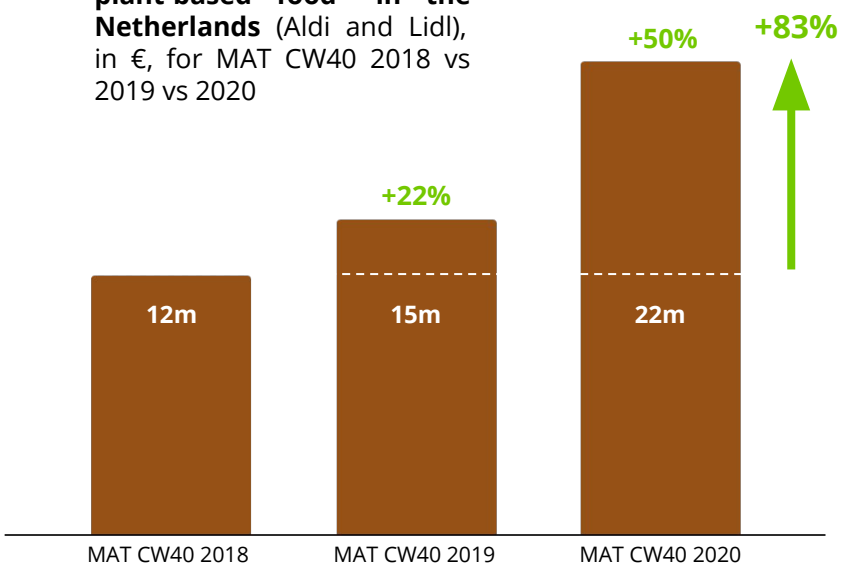
Source: Nielsen MarketTrack

MAT=Moving Annual Total

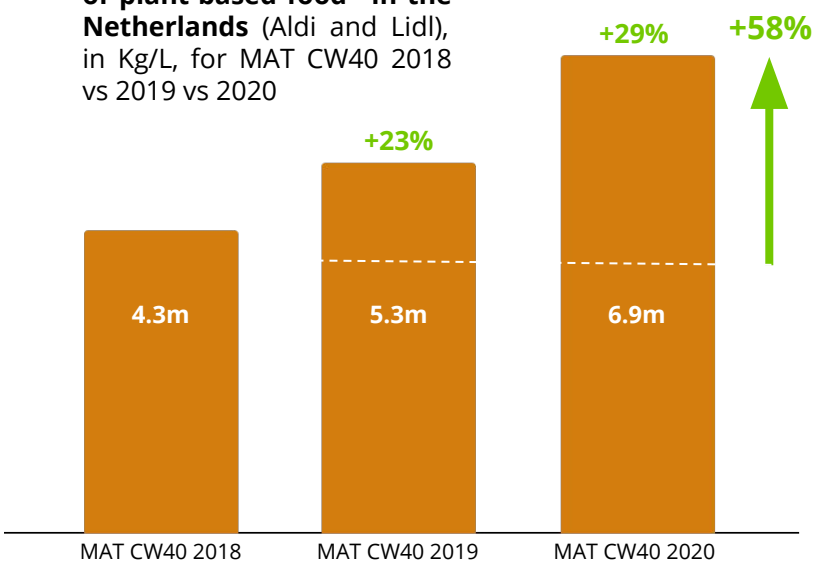
Plant-based sector overview: The Netherlands
Discounters' sales value and sales volume

Discounters experienced even stronger growth over the past two periods.

Discounters' sales value of plant-based food* in the Netherlands (Aldi and Lidl), in €, for MAT CW40 2018 vs 2019 vs 2020



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



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

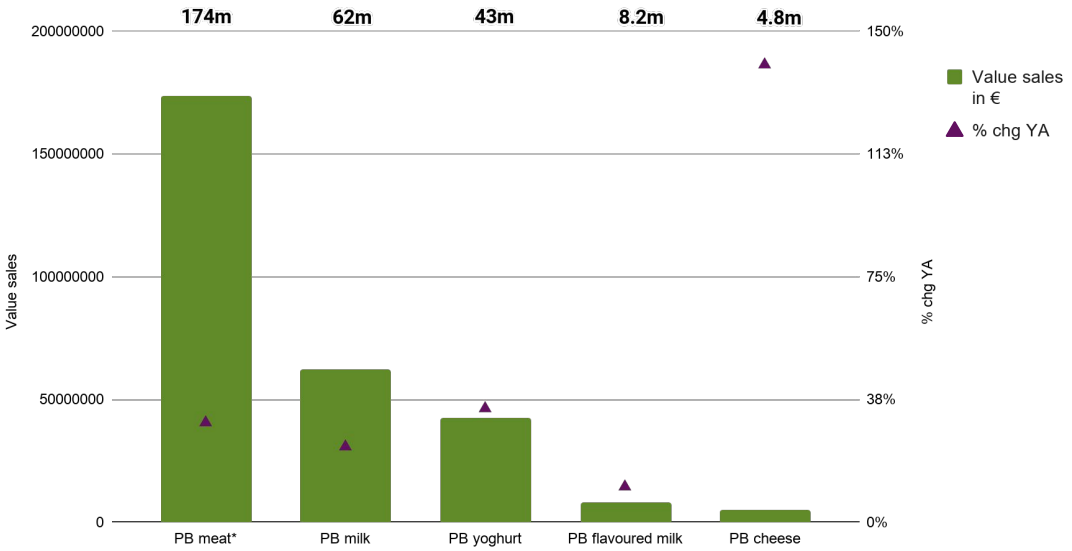
Source: Nielsen MarketTrack

MAT=Moving Annual Total

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



*Vegan and vegetarian

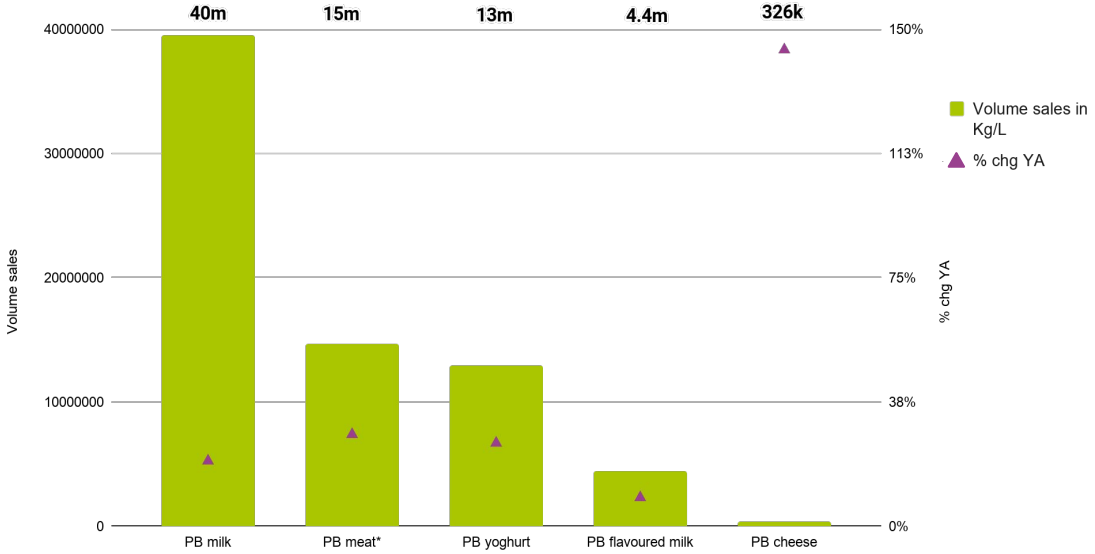
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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



*Vegan and vegetarian

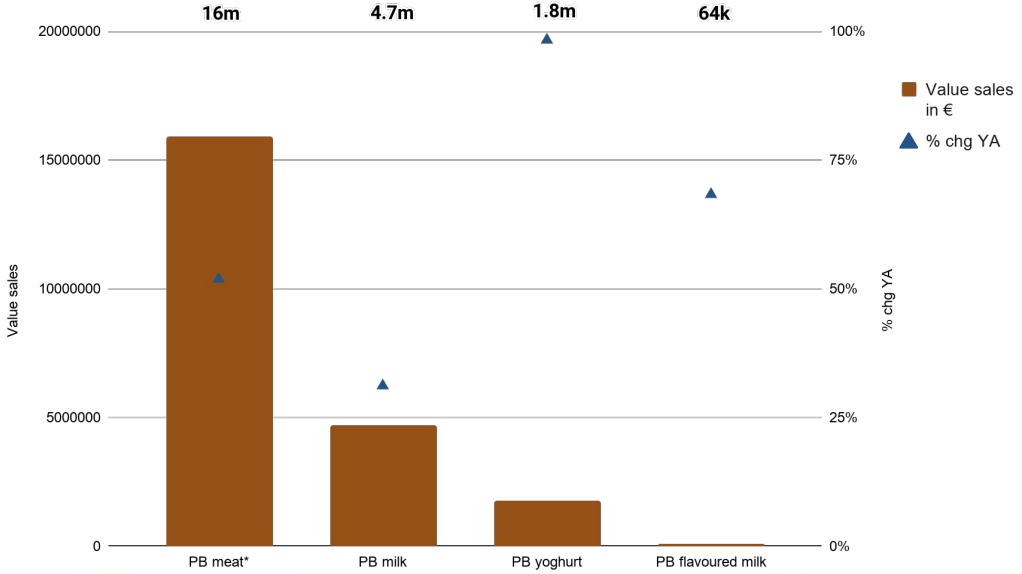
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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

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

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



*Vegan and vegetarian

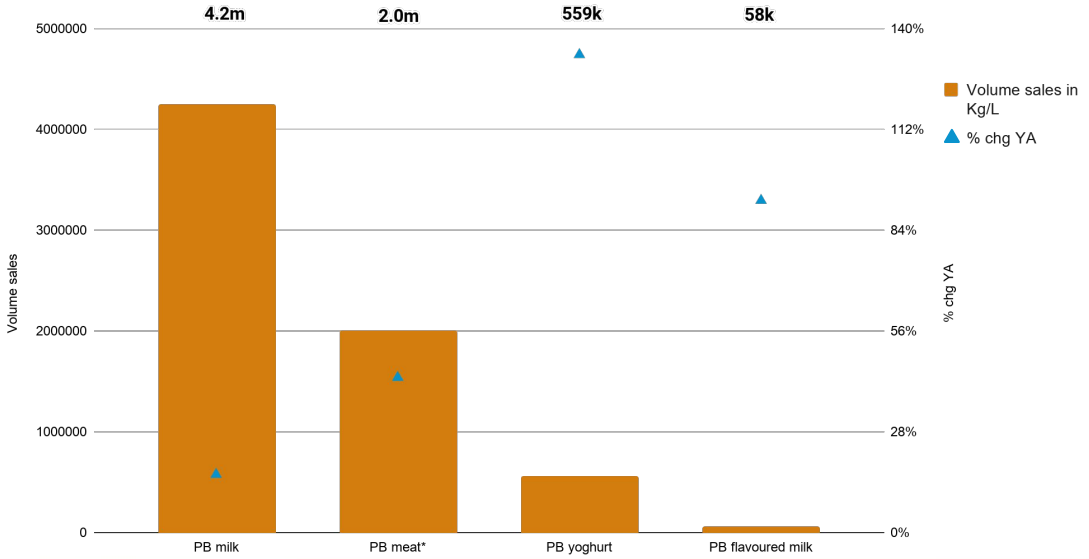
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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

Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

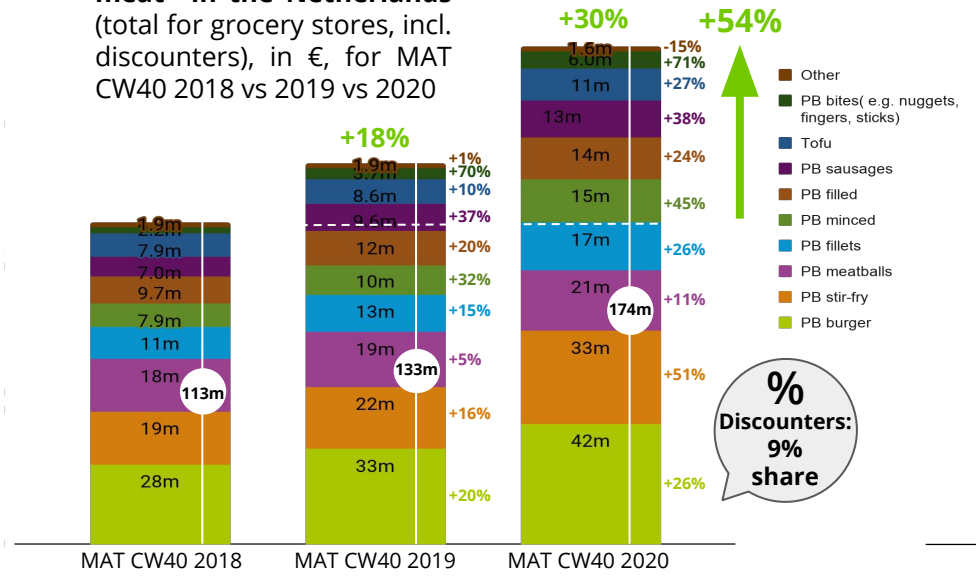
Plant-based sector deep dive: The Netherlands

www.smartproteinproject.eu

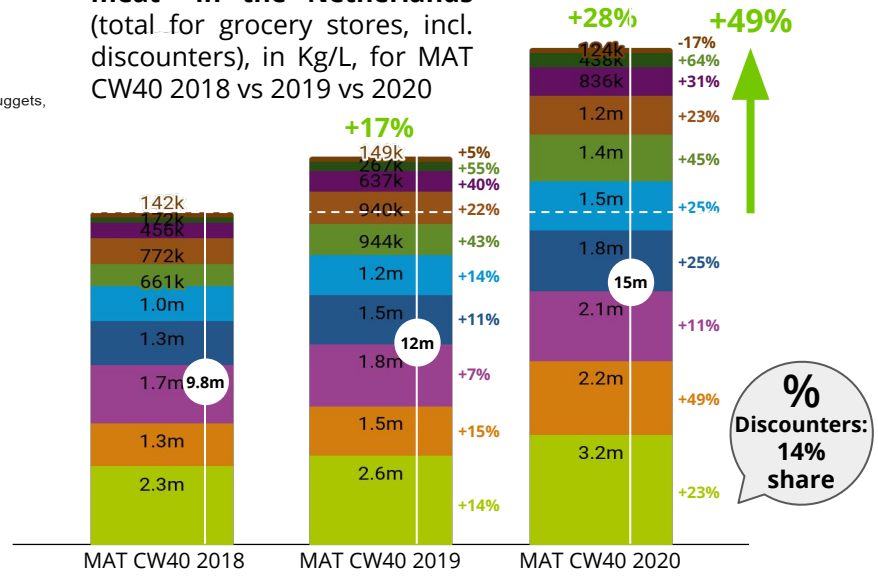
PB sector deep dive: The Netherlands
Total plant-based-meat sales

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

Sales value of plant-based meat* in the Netherlands (total for grocery stores, incl. discounters), in €, for MAT CW40 2018 vs 2019 vs 2020



Sales volume of plant-based meat* in the Netherlands (total for grocery stores, incl. discounters), in Kg/L, for MAT CW40 2018 vs 2019 vs 2020



*Vegan and vegetarian

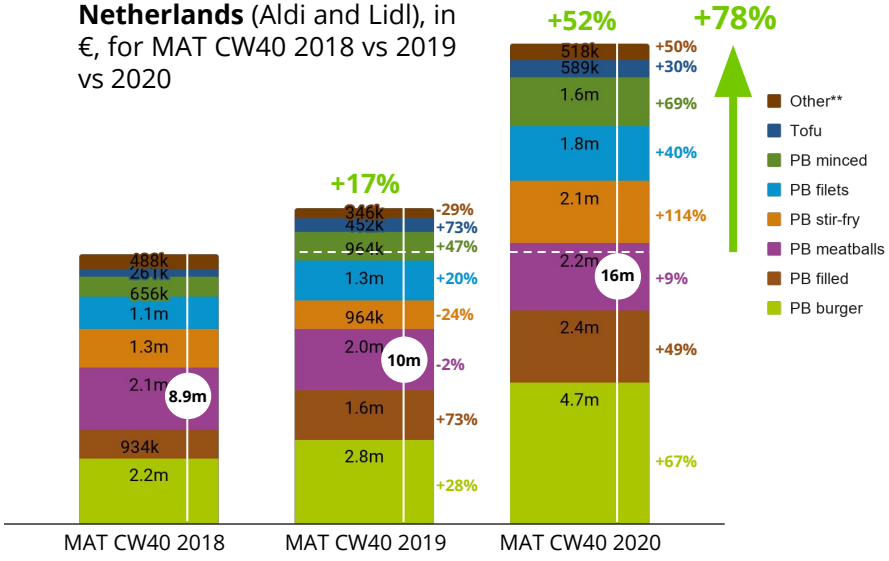
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

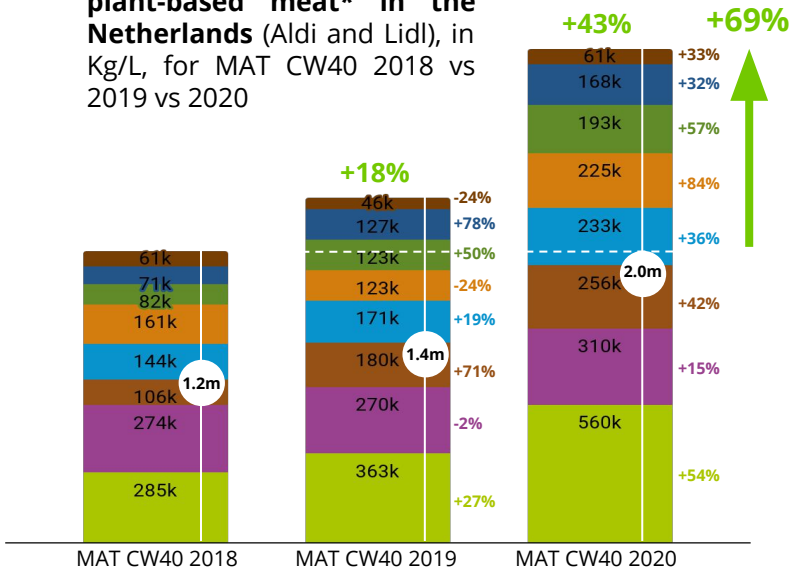
PB sector deep dive: The Netherlands
Discounters' plant-based-meat sales

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

Discounters' sales volume of plant-based meat* in the Netherlands (Aldi and Lidl), in €, for MAT CW40 2018 vs 2019 vs 2020



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



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

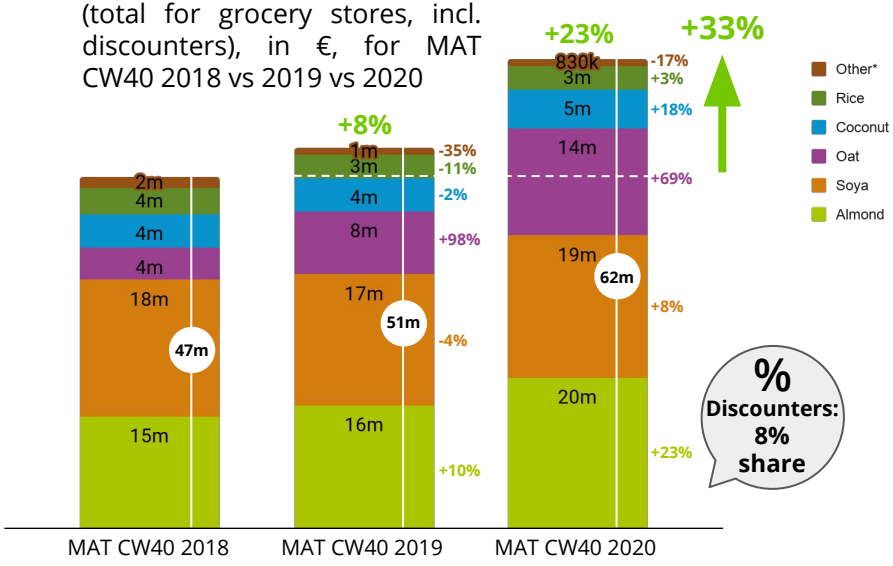
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

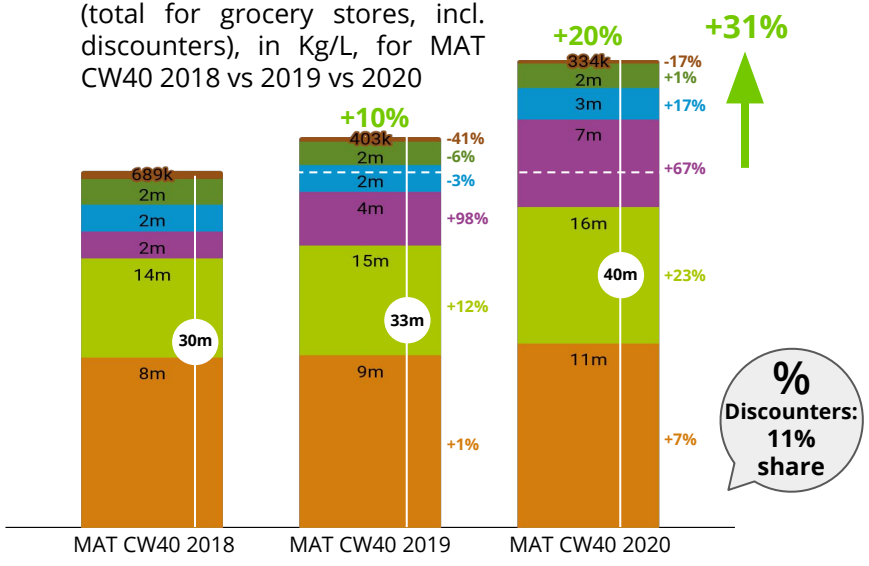
PB sector deep dive: The Netherlands
Total plant-based plain-milk sales

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

Sales value of plant-based plain milk in the Netherlands (total for grocery stores, incl. discounters), in €, for MAT CW40 2018 vs 2019 vs 2020



Sales volume of plant-based plain milk in the Netherlands (total for grocery stores, incl. discounters), in Kg/L, for MAT CW40 2018 vs 2019 vs 2020



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

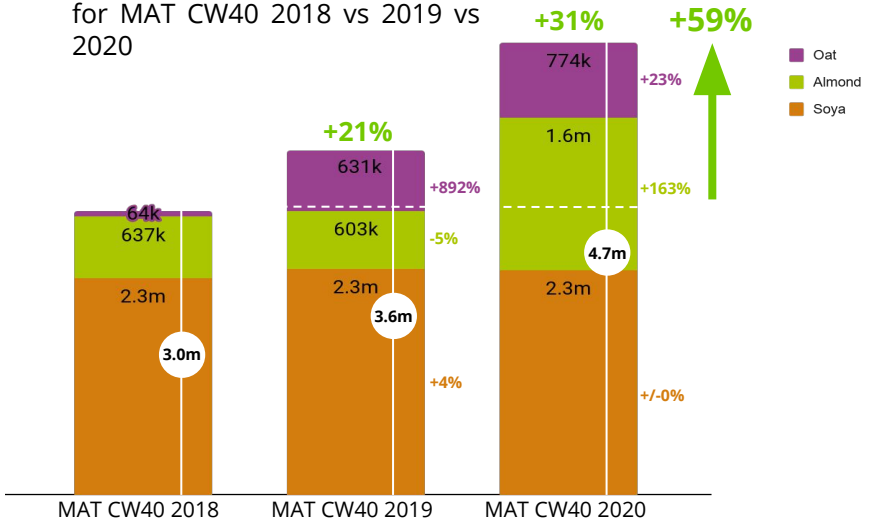
Source: Nielsen MarketTrack

MAT=Moving Annual Total

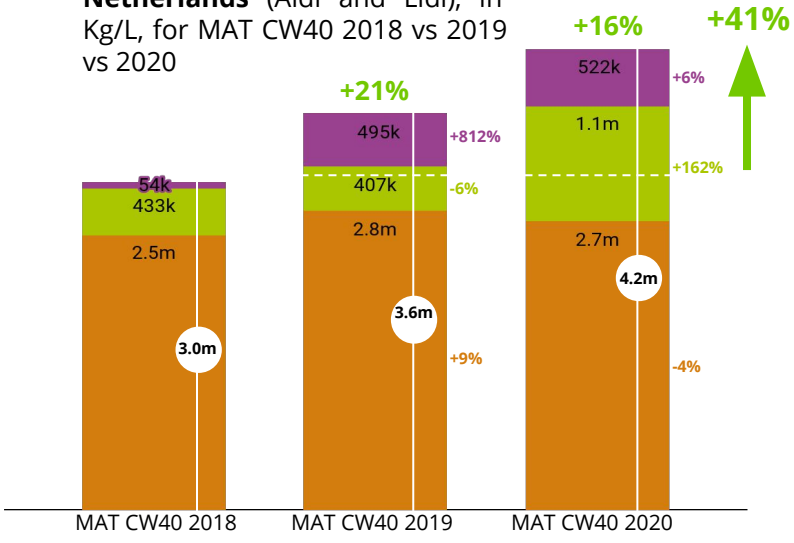
PB sector deep dive: The Netherlands
Discounters' plant-based plain-milk sales

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

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



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



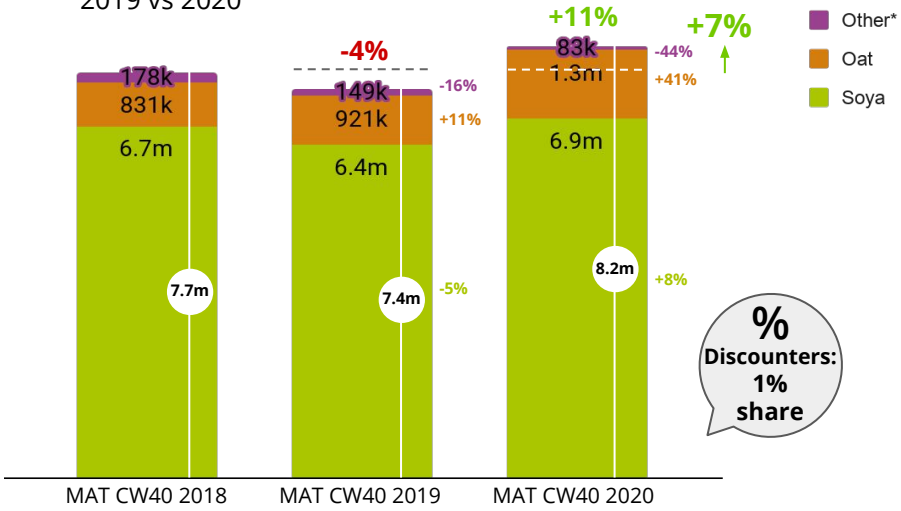
Source: Nielsen MarketTrack

MAT=Moving Annual Total

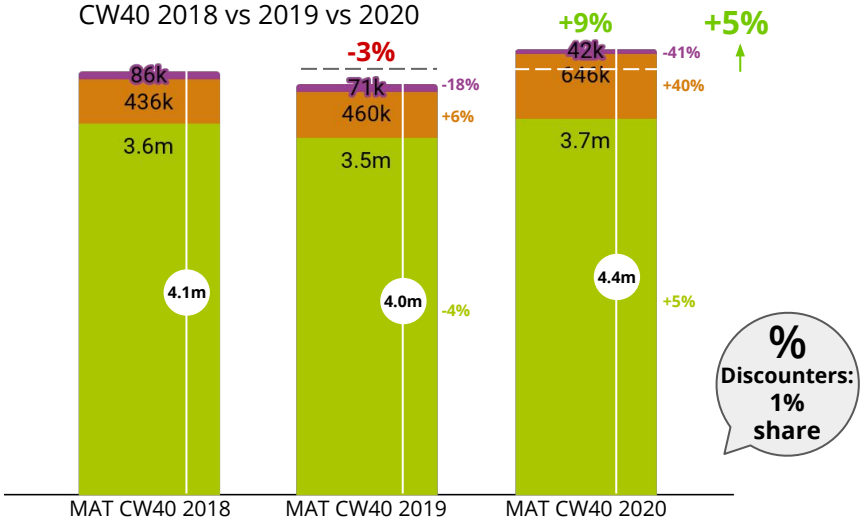
PB sector deep dive: The Netherlands
Total plant-based flavoured-milk sales

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

Sales value of plant-based flavoured milk in the Netherlands (total for grocery stores, incl. discounters), in €, for MAT CW40 2018 vs 2019 vs 2020



Sales volume of plant-based flavoured milk in the Netherlands (total for grocery stores, incl. discounters), in Kg/L, for MAT CW40 2018 vs 2019 vs 2020



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

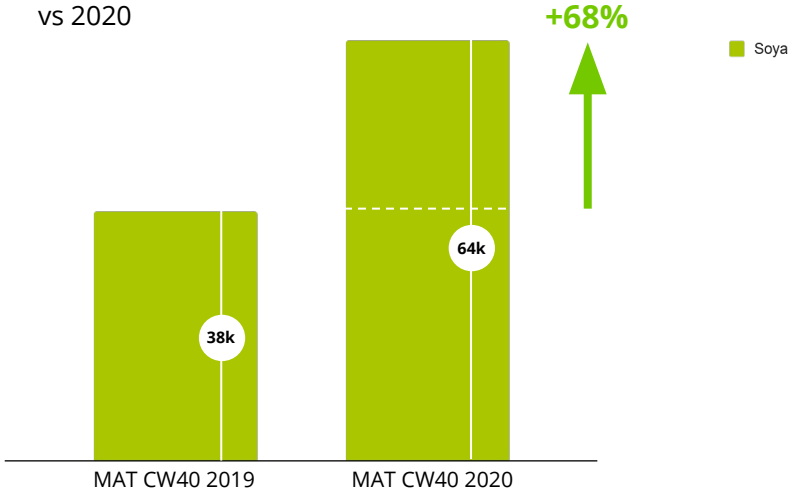
Source: Nielsen MarketTrack

MAT=Moving Annual Total

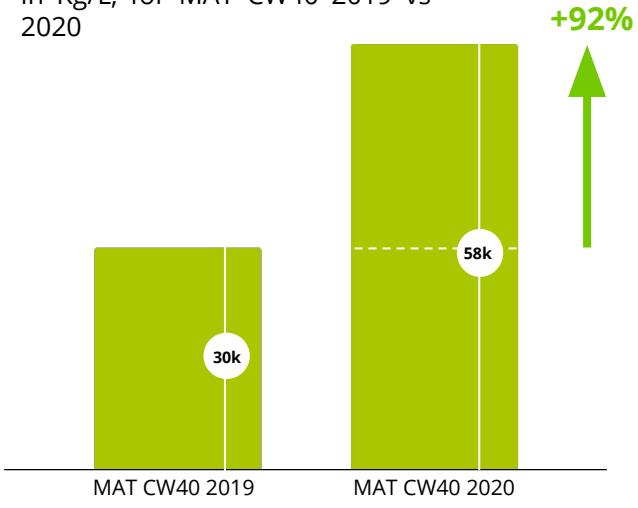
PB sector deep dive: The Netherlands
Discounters' PB flavoured-milk sales

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

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



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



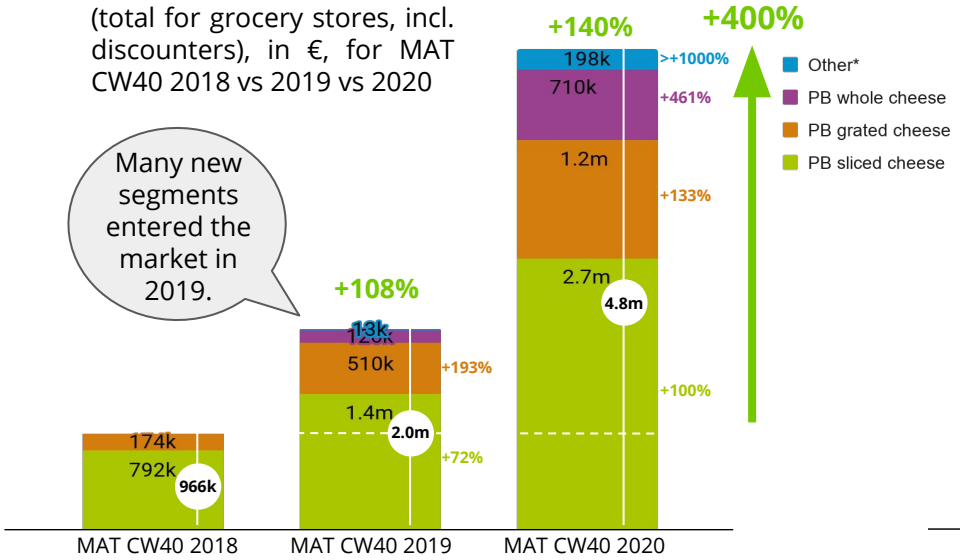
Source: Nielsen MarketTrack

MAT=Moving Annual Total

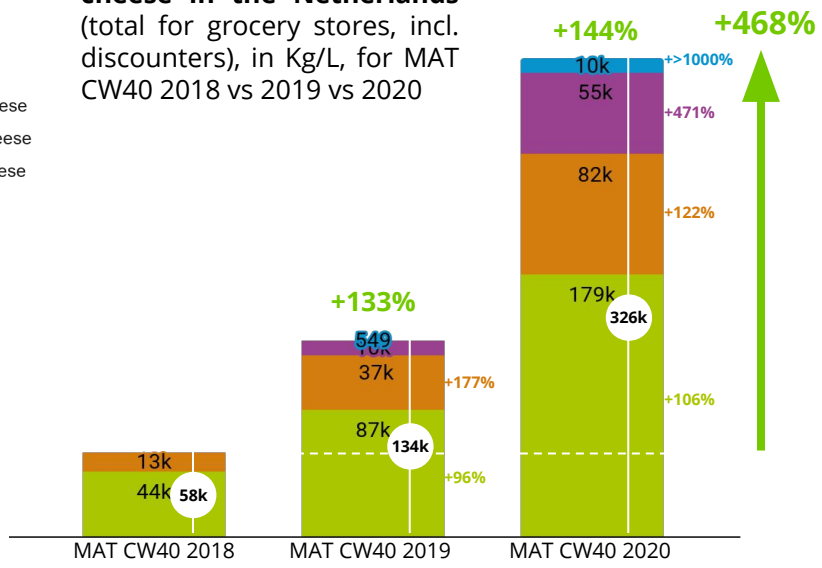
PB sector deep dive: The Netherlands
Total plant-based-cheese sales

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

Sales value of plant-based cheese in the Netherlands (total for grocery stores, incl. discounters), in €, for MAT CW40 2018 vs 2019 vs 2020



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



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

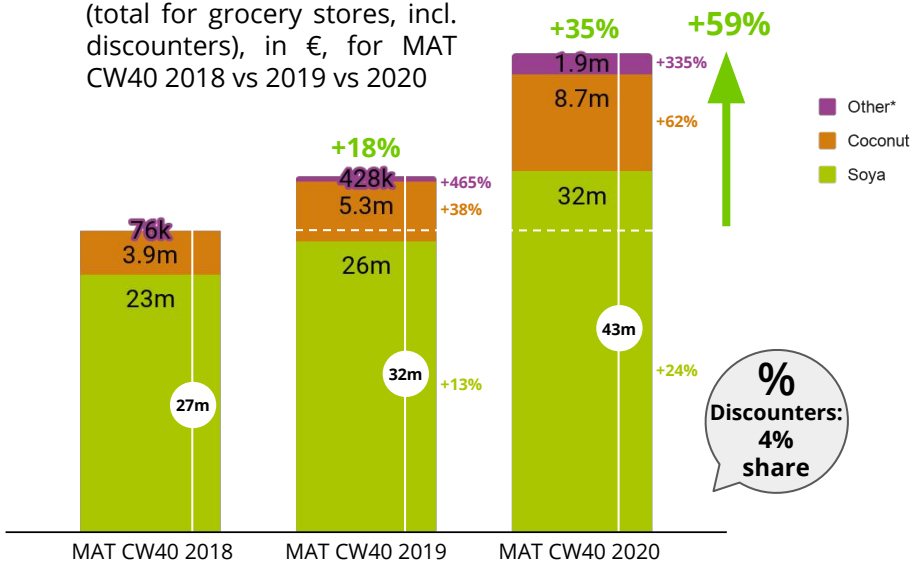
Source: Nielsen MarketTrack

MAT=Moving Annual Total

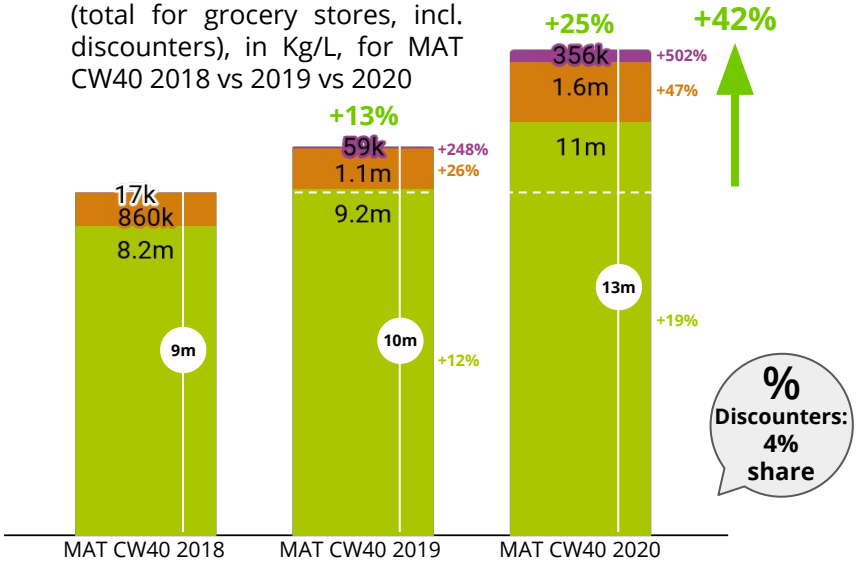
PB sector deep dive: The Netherlands
Total plant-based-yoghurt sales

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

Sales value of plant-based yoghurt in the Netherlands (total for grocery stores, incl. discounters), in €, for MAT CW40 2018 vs 2019 vs 2020



Sales volume of plant-based yoghurt in the Netherlands (total for grocery stores, incl. discounters), in Kg/L, for MAT CW40 2018 vs 2019 vs 2020



*Other includes blend, almond, oat, cashew

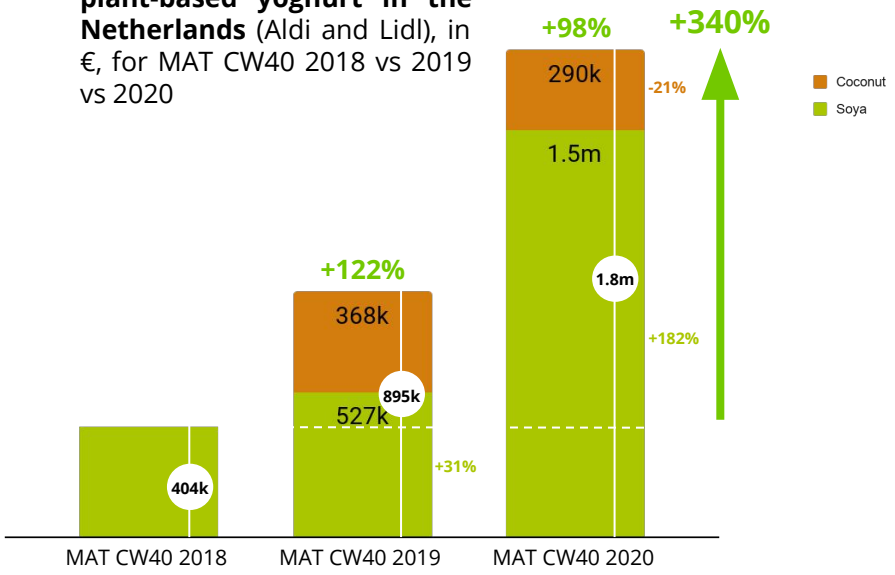
Source: Nielsen MarketTrack

MAT=Moving Annual Total

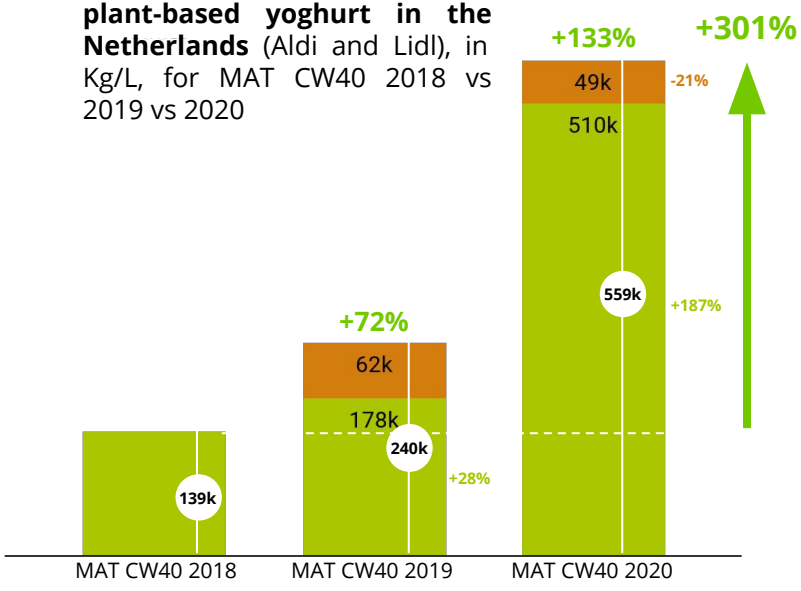
PB sector deep dive: The Netherlands
Discounters' plant-based-yoghurt sales

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

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



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



Source: Nielsen MarketTrack

MAT=Moving Annual Total

smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

Poland

www.smartproteinproject.eu

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'.

Source: Nielsen MarketTrack

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.

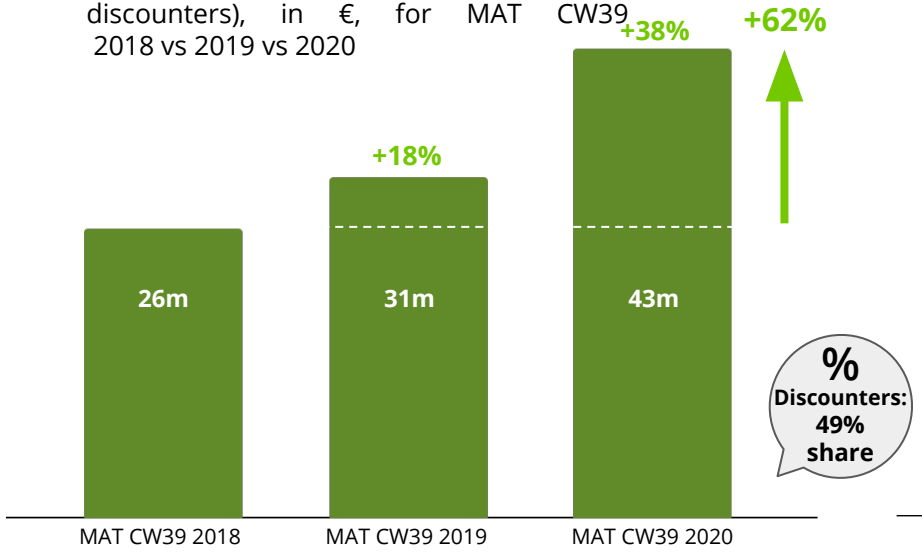
All numbers refer to MAT CW39 2020 if not stated otherwise

Source: Nielsen MarketTrack

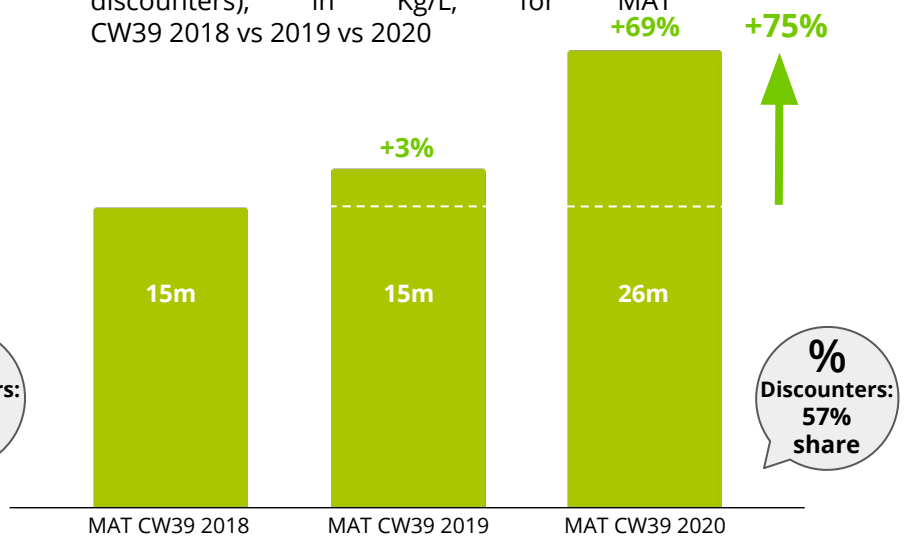
Plant-based sector overview: Poland
Total sales value and sales volume

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

Sales value of plant-based milk* in Poland (total incl. impulse, chemist chains, discounters), in €, for MAT CW39 2018 vs 2019 vs 2020



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



*Plain and flavoured

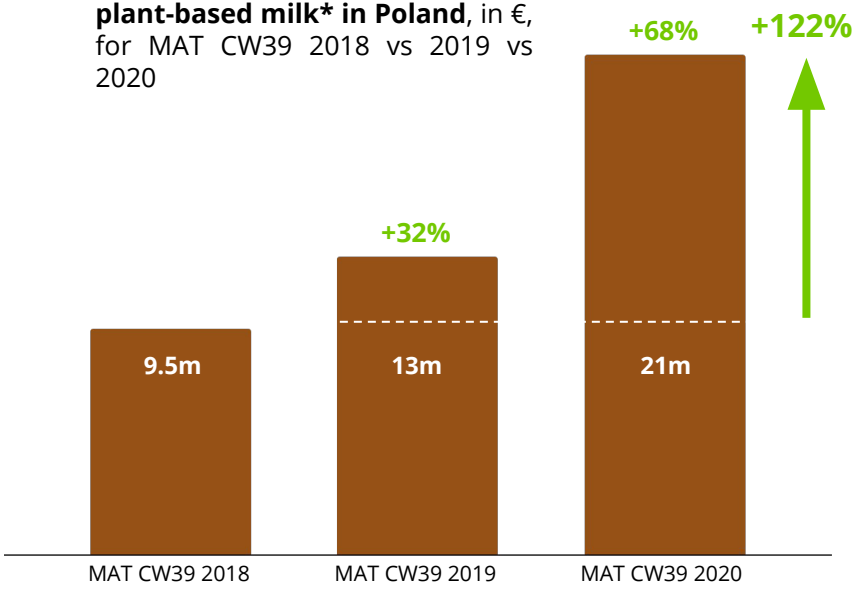
Source: Nielsen MarketTrack

MAT=Moving Annual Total

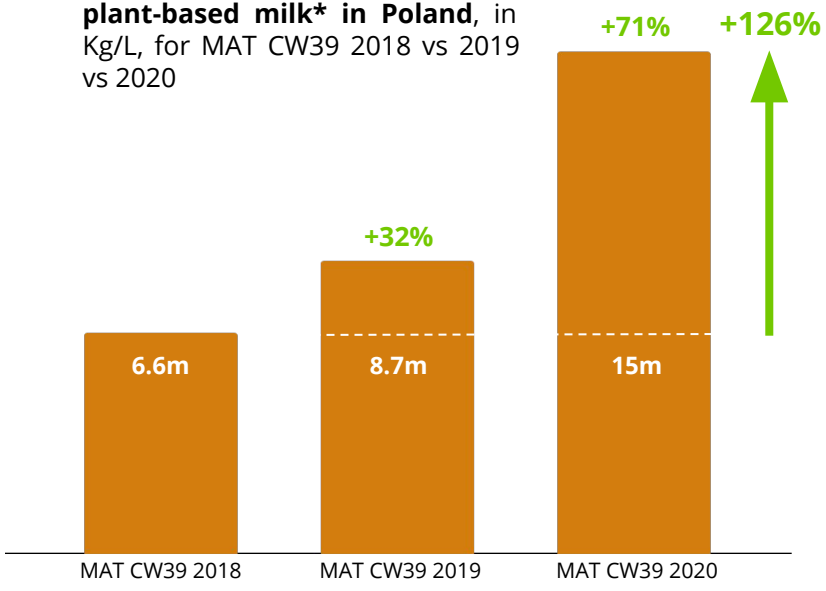
Plant-based sector overview: Poland
Discounters' sales value and sales volume

Discounters experienced even stronger growth over the past two periods.

Discounters' sales value of plant-based milk* in Poland, in €, for MAT CW39 2018 vs 2019 vs 2020



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



*Plain and flavoured

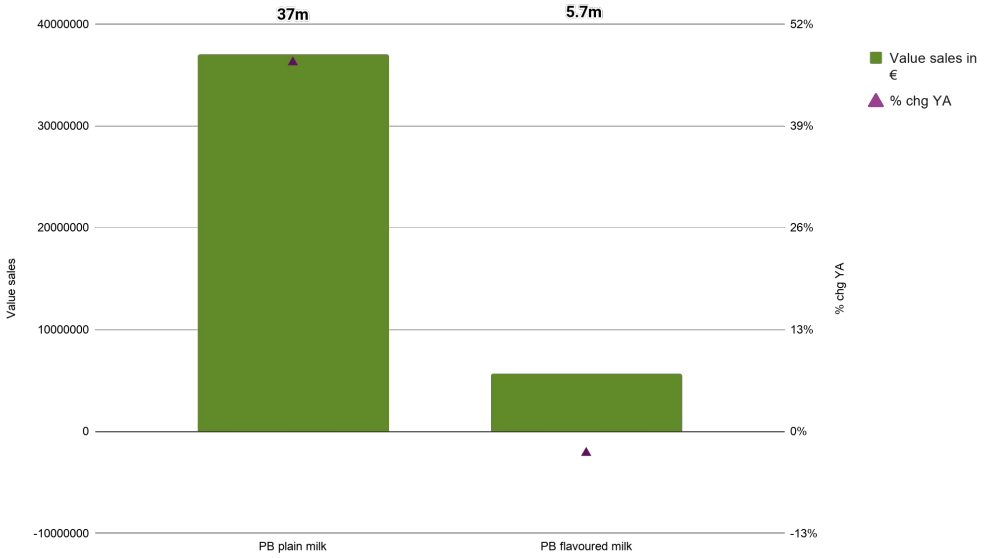
Source: Nielsen MarketTrack

MAT=Moving Annual Total

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



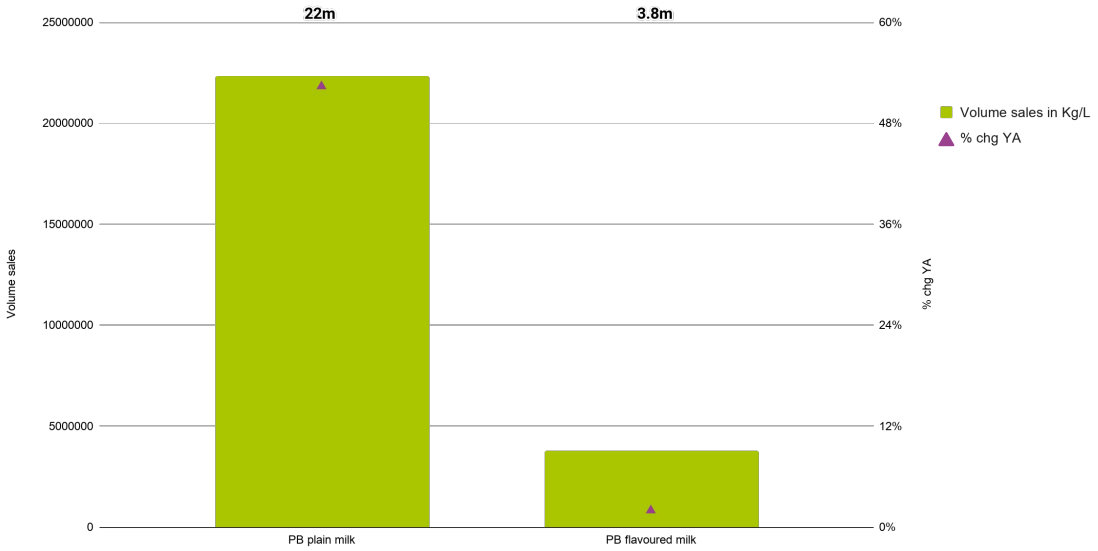
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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



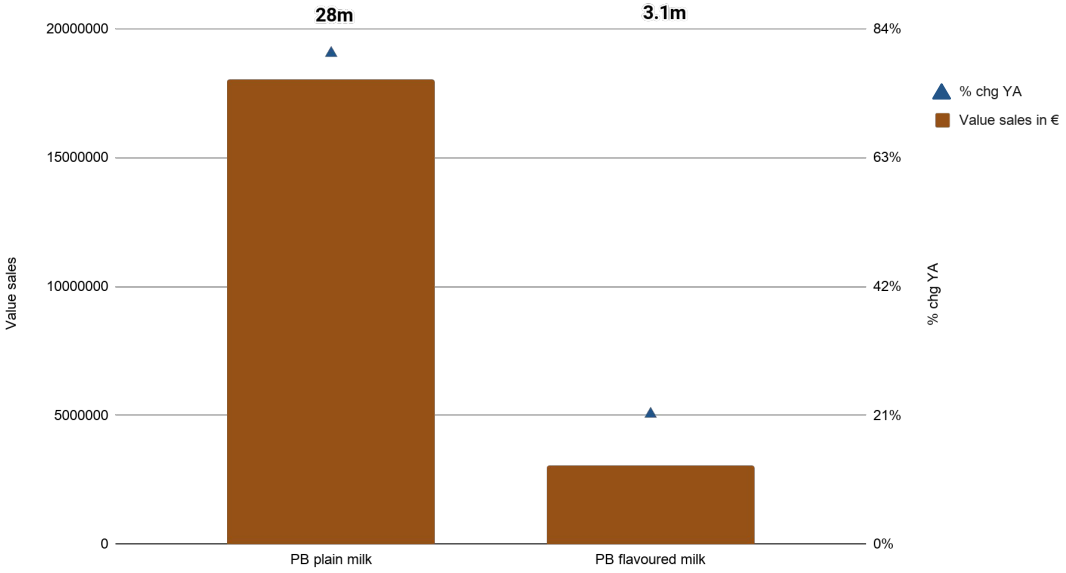
Source: Nielsen MarketTrack

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.

Discounters' sales value of plant-based milk in Poland by category, in €, for MAT CW39 2020



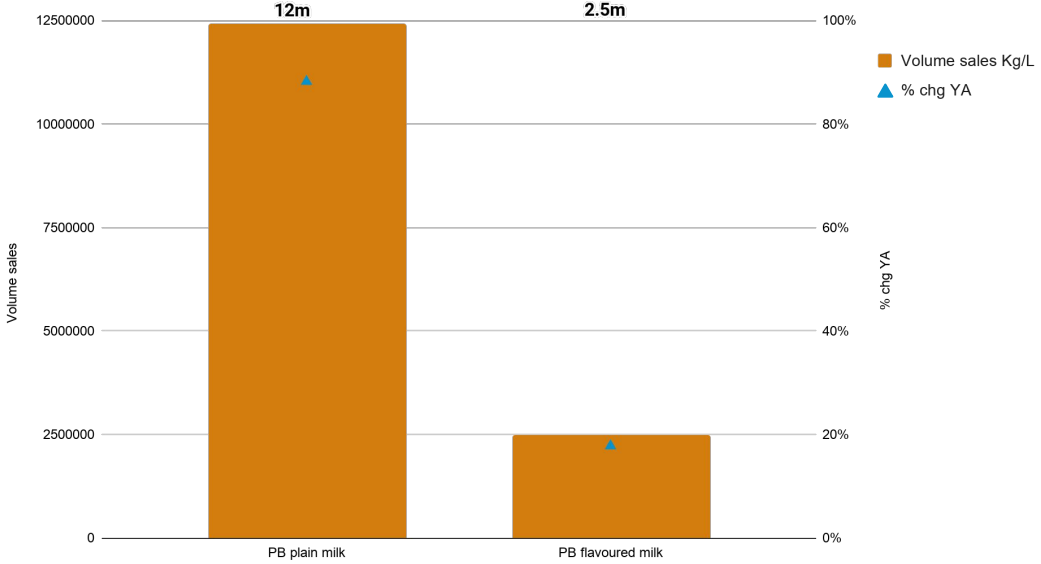
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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.

Discounters' sales volume of plant-based milk in Poland by category, in Kg/L, for MAT CW39 2020



Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

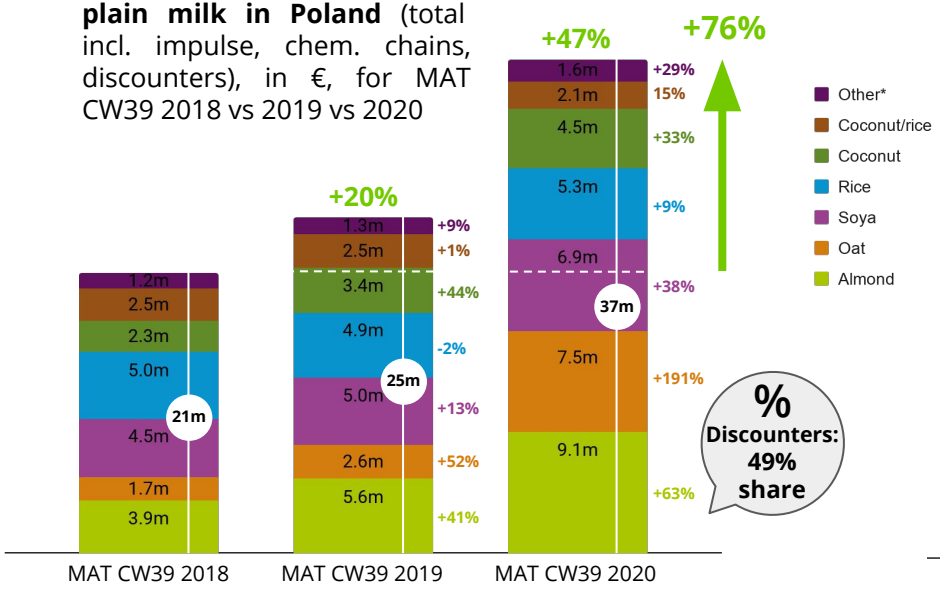
Plant-based sector deep dive: Poland

www.smartproteinproject.eu

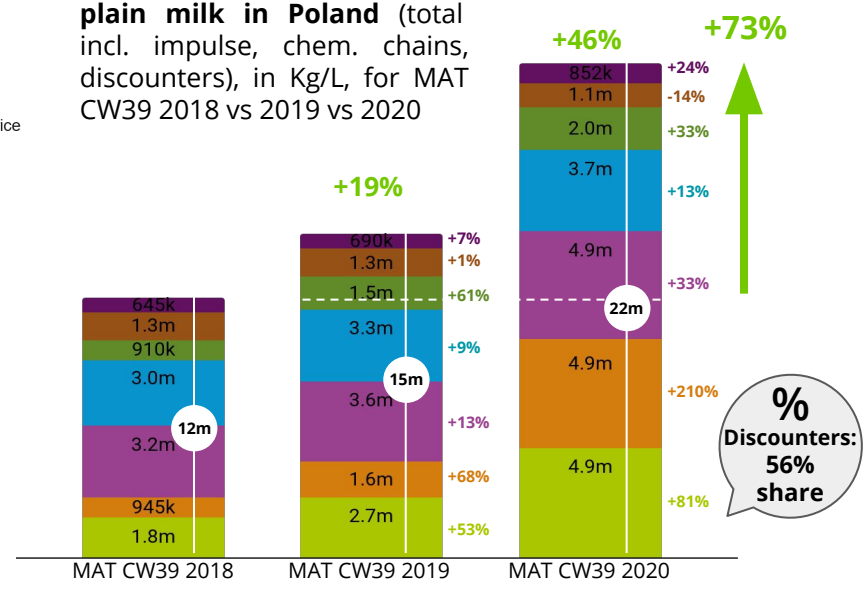
Plant-based sector deep dive: Poland
Total plant-based plain-milk sales

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

Sales value of plant-based plain milk in Poland (total incl. impulse, chem. chains, discounters), in €, for MAT CW39 2018 vs 2019 vs 2020



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



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

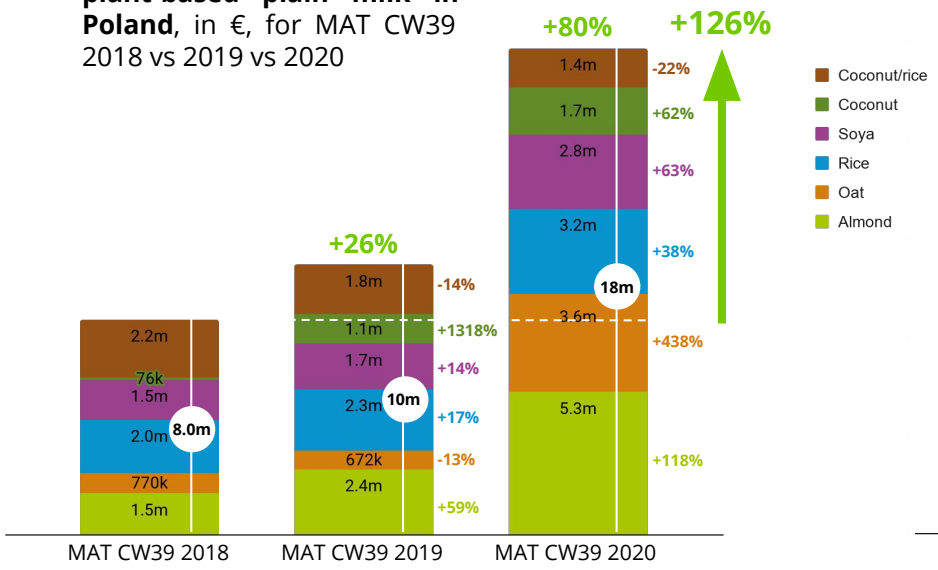
Source: Nielsen MarketTrack

MAT=Moving Annual Total

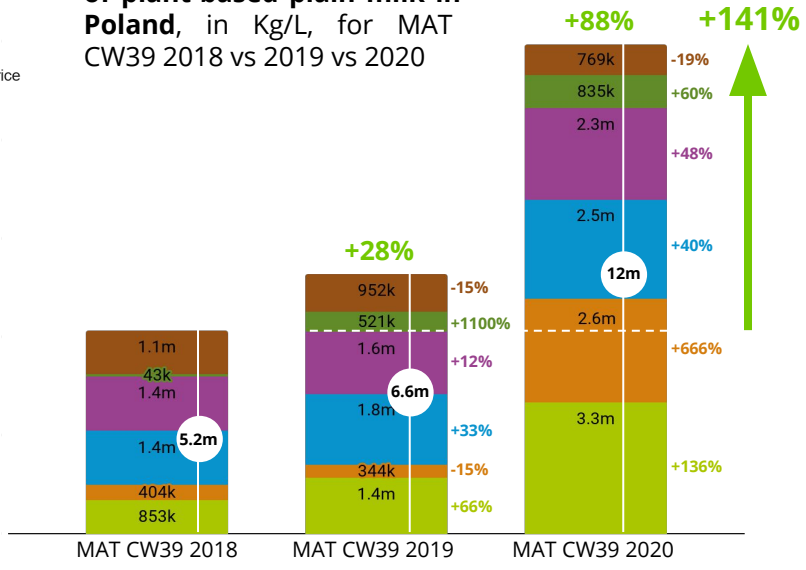
Plant-based sector deep dive: Poland
Discounters' plant-based plain-milk sales

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

Discounters' sales value of plant-based plain milk in Poland, in €, for MAT CW39 2018 vs 2019 vs 2020



Discounters' sales volume of plant-based plain milk in Poland, in Kg/L, for MAT CW39 2018 vs 2019 vs 2020



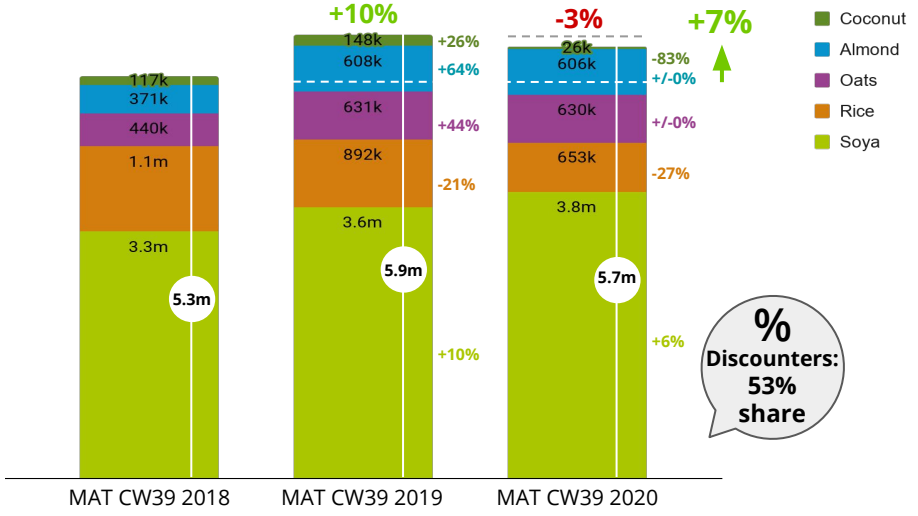
Source: Nielsen MarketTrack

MAT=Moving Annual Total

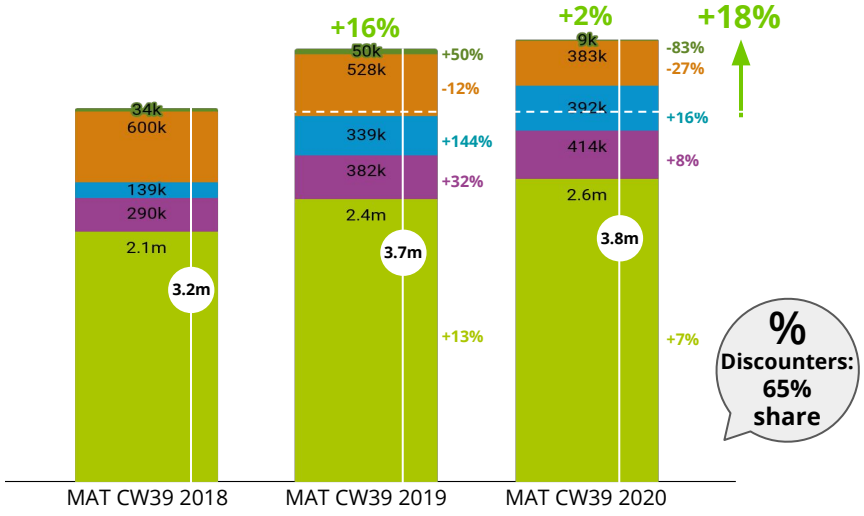
Plant-based sector deep dive: Poland
Total plant-based flavoured-milk sales

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 2019 vs 2020



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



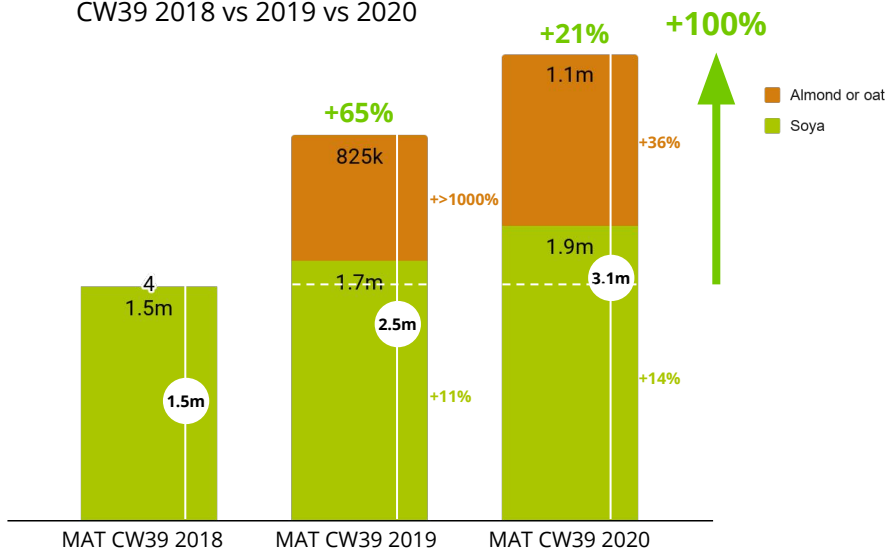
Source: Nielsen MarketTrack

MAT=Moving Annual Total

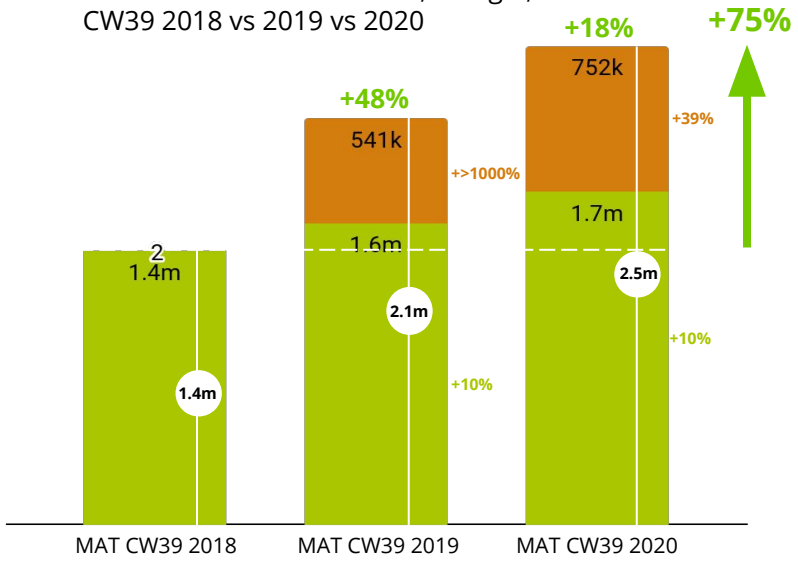
Plant-based sector deep dive: Poland
Discounters' PB flavoured-milk sales

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

Discounters' sales value of plant-based flavoured milk in Poland, in €, for MAT CW39 2018 vs 2019 vs 2020



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



Source: Nielsen MarketTrack

MAT=Moving Annual Total

smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

Romania

www.smartproteinproject.eu

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”.

Source: Nielsen MarketTrack

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%).

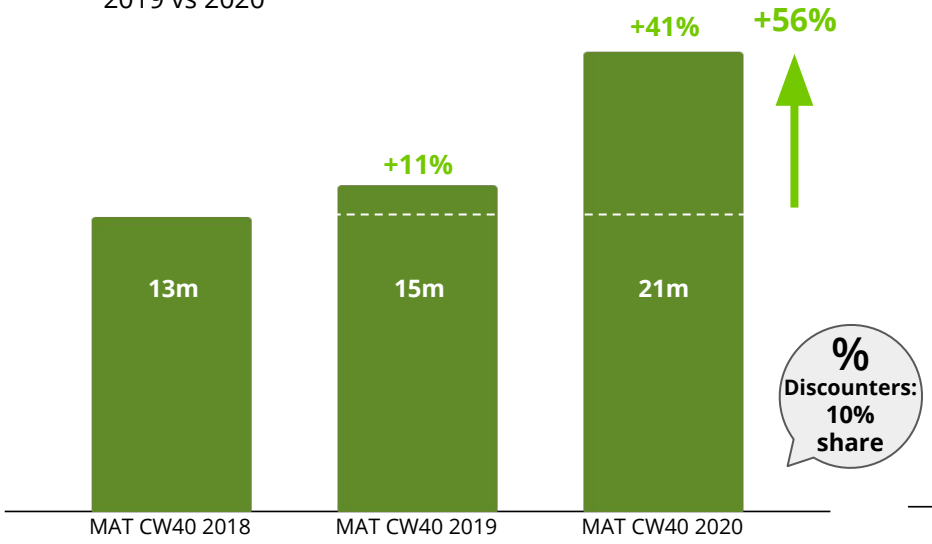
*Includes plant-based meat (vegan and vegetarian), plant-based milk; all numbers refer to MAT CW40 2020 if not stated otherwise

Source: Nielsen MarketTrack

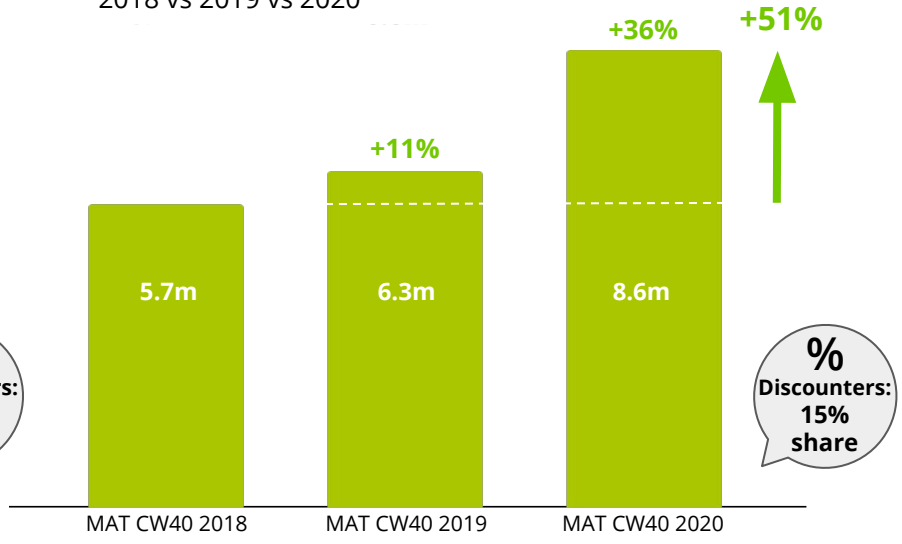
Plant-based sector overview: Romania
Total sales value and sales volume

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

Sales value of plant-based food* in Romania (total incl. discounters), in €, for MAT CW40 2018 vs 2019 vs 2020



Sales volume of plant-based food* in Romania (total incl. discounters), in Kg/L, for MAT CW40 2018 vs 2019 vs 2020



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

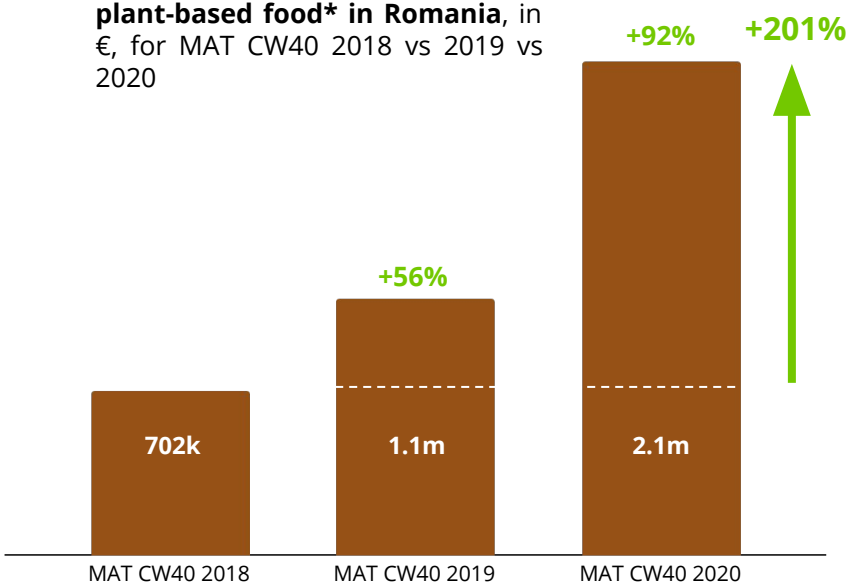
Source: Nielsen MarketTrack

MAT=Moving Annual Total

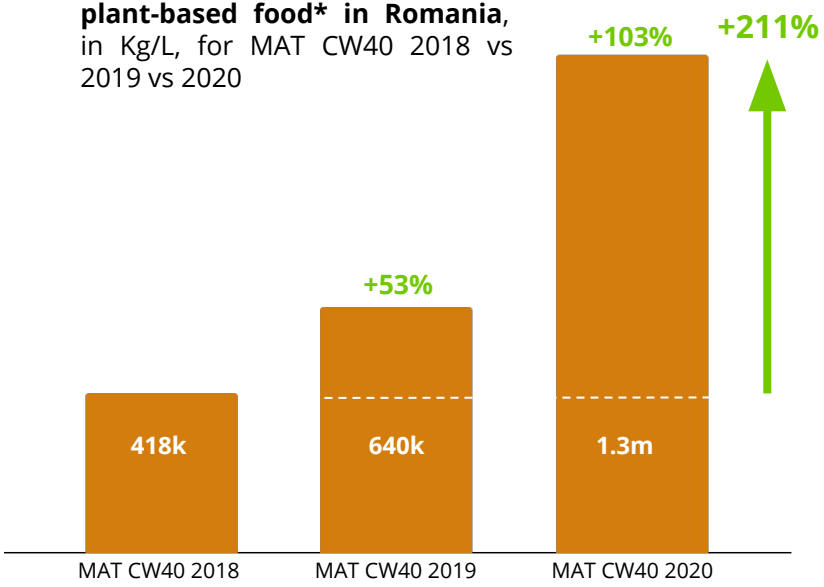
Plant-based sector overview: Romania
Discounters' sales value and sales volume

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

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



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



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

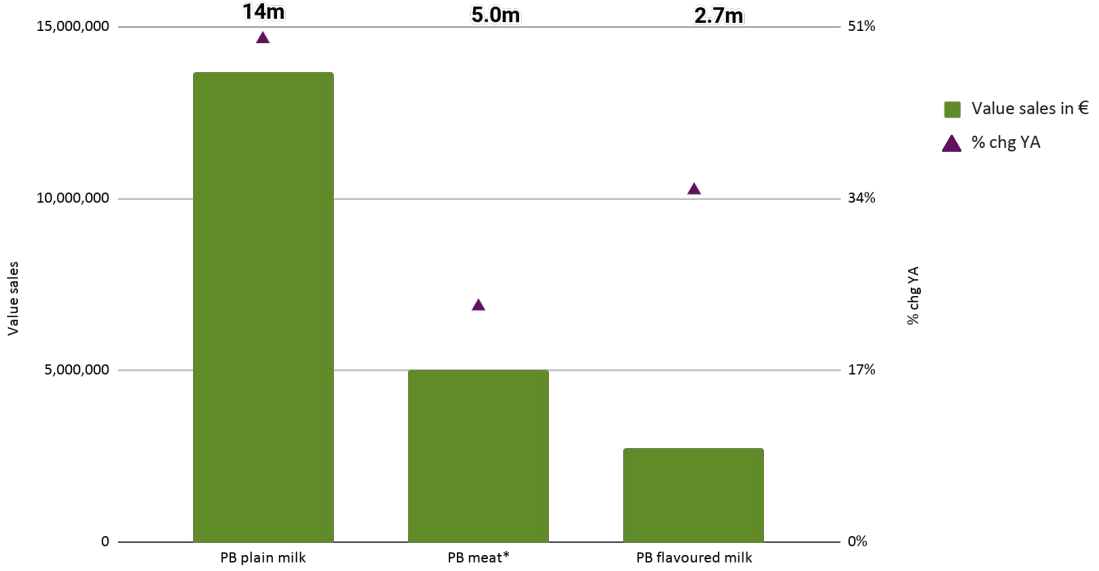
Source: Nielsen MarketTrack

MAT=Moving Annual Total

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.

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



*Vegan and vegetarian

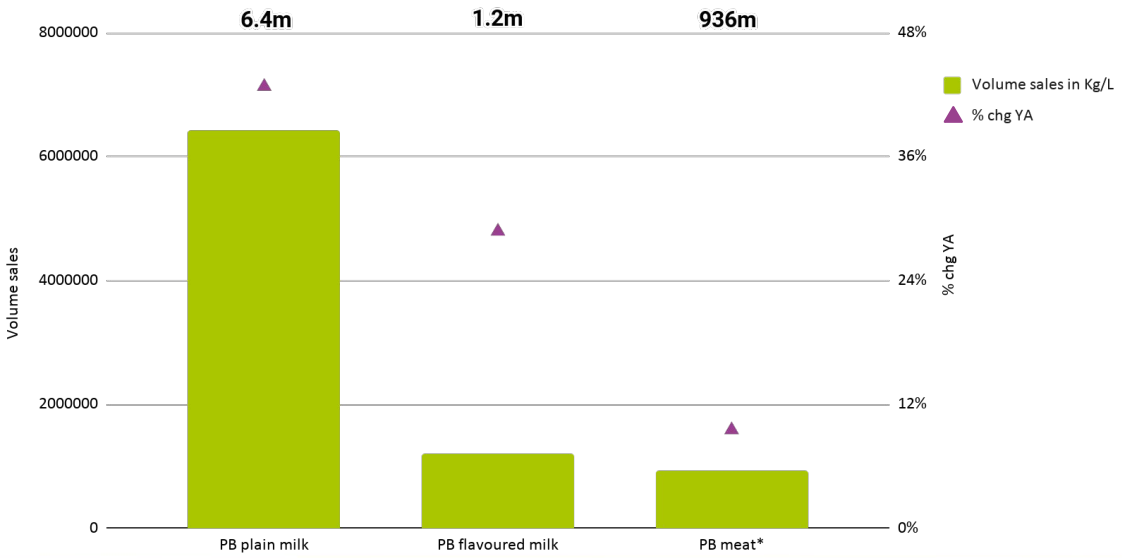
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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

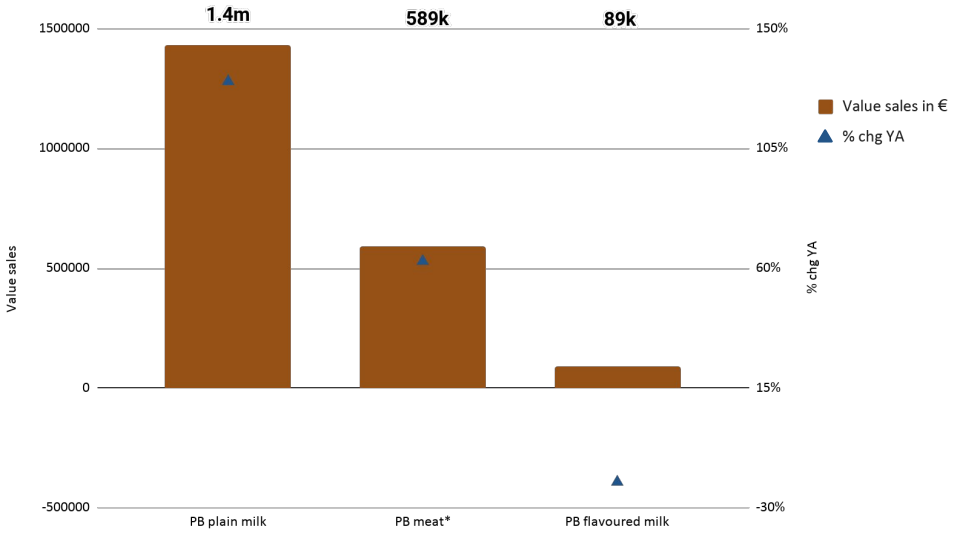
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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



*Vegan and vegetarian

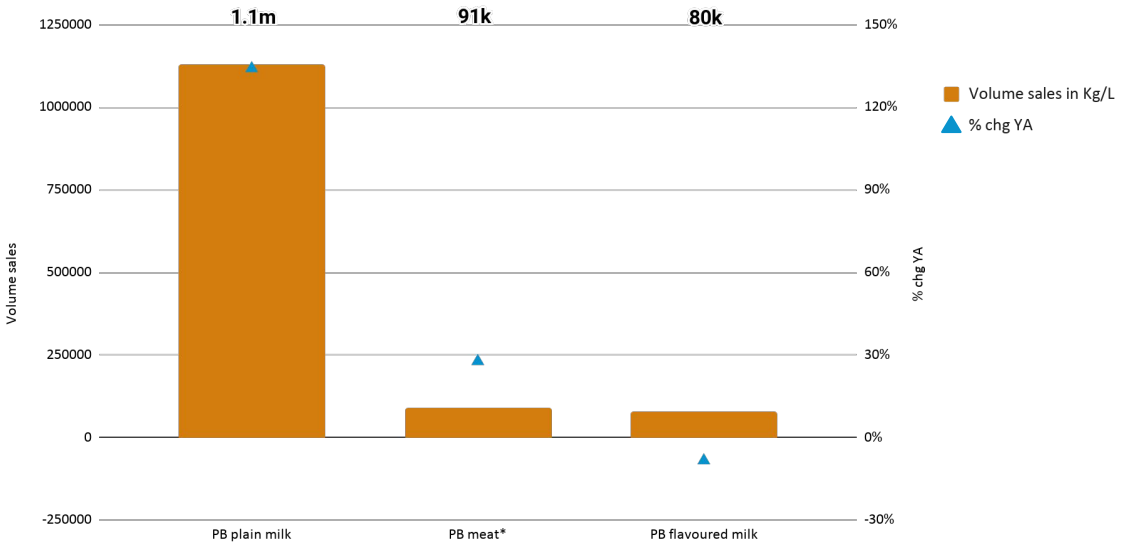
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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

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

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



*Vegan and vegetarian

Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

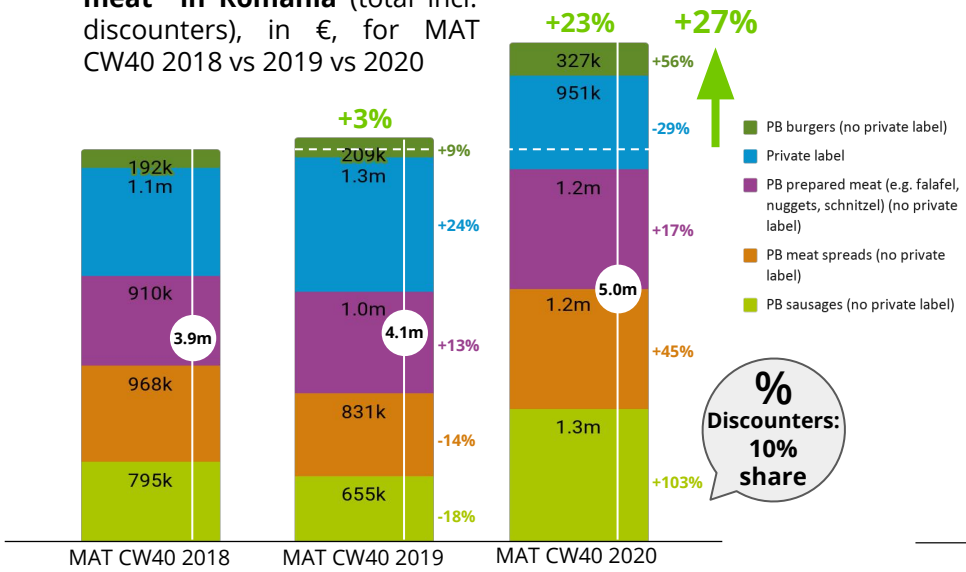
Plant-based sector deep dive: Romania

www.smartproteinproject.eu

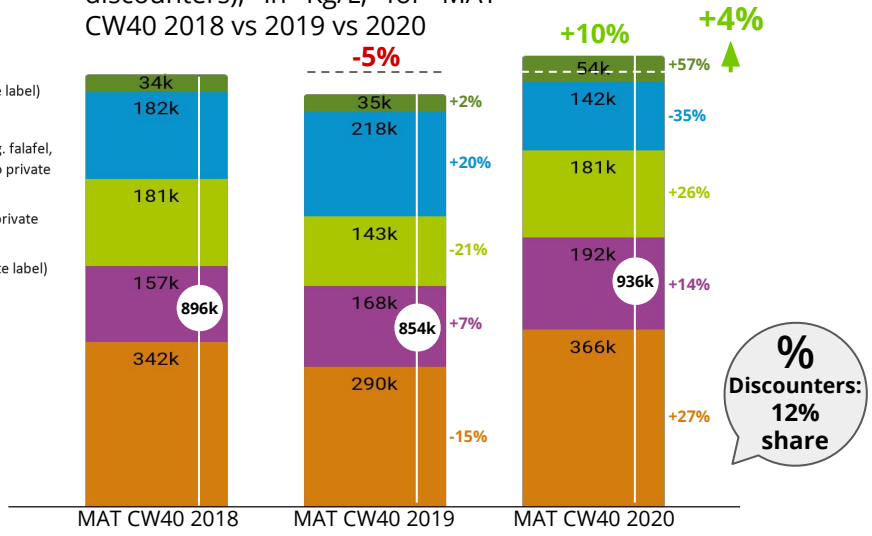
Plant-based sector deep dive: Romania
Total plant-based-meat sales

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

Sales value of plant-based meat* in Romania (total incl. discounters), in €, for MAT CW40 2018 vs 2019 vs 2020



Sales volume of plant-based meat* in Romania (total incl. discounters), in Kg/L, for MAT CW40 2018 vs 2019 vs 2020



*Vegan and vegetarian

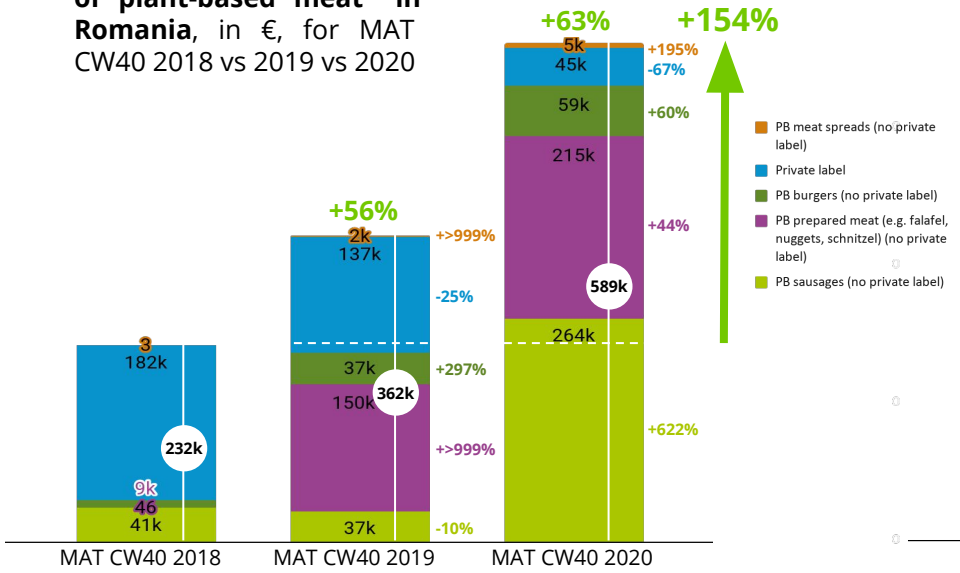
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

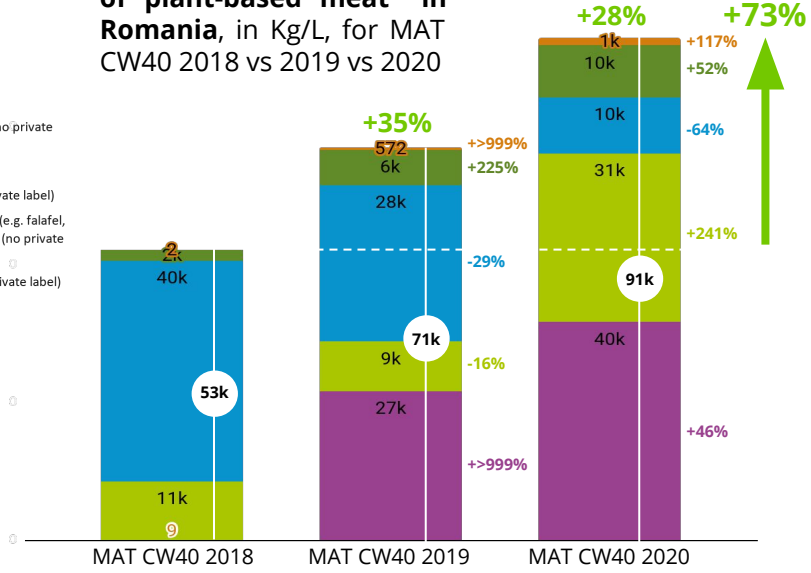
Plant-based sector deep dive: Romania
Discounters' plant-based-meat sales

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

Discounters' sales volume of plant-based meat* in Romania, in €, for MAT CW40 2018 vs 2019 vs 2020



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



*Vegan and vegetarian

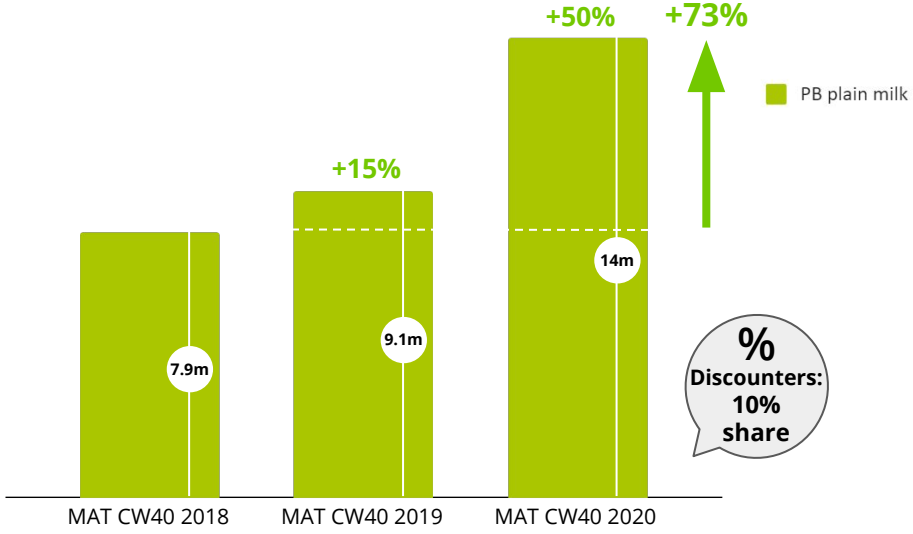
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

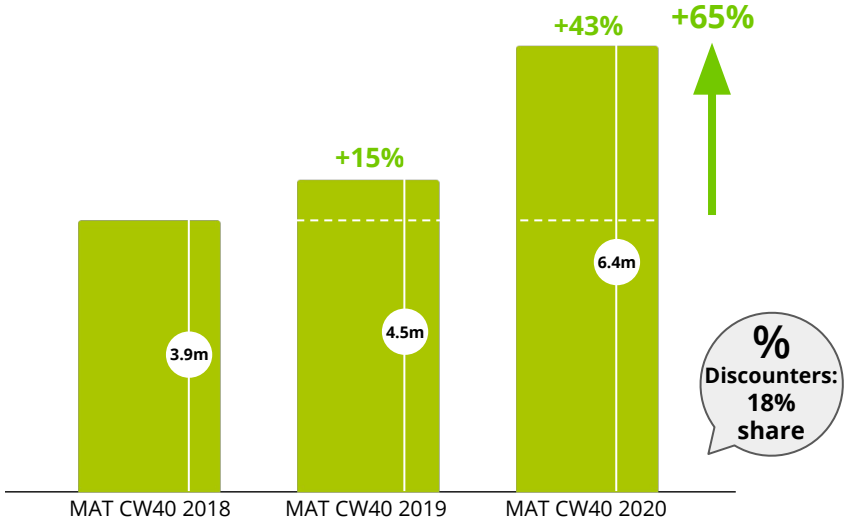
Plant-based sector deep dive: Romania
Total plant-based plain-milk sales

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

Sales value of plant-based plain milk in Romania (total incl. discounters), in €, for MAT CW40 2018 vs 2019 vs 2020



Sales volume of plant-based plain milk in Romania (total incl. discounters), in Kg/L, for MAT CW40 2018 vs 2019 vs 2020



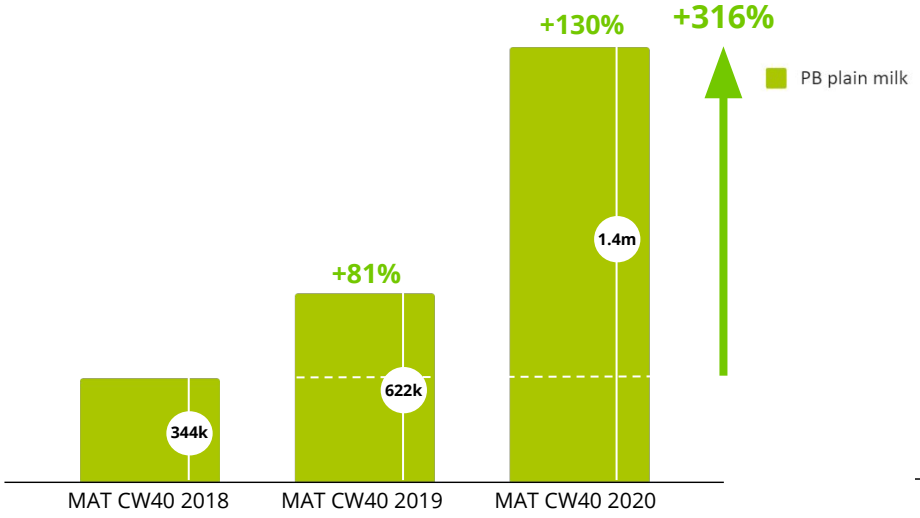
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

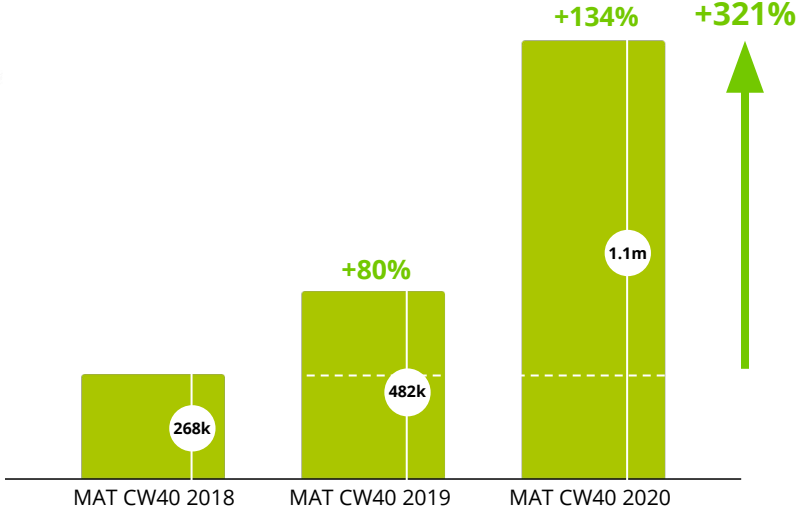
Plant-based sector deep dive: Romania
Discounters' plant-based plain-milk sales

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



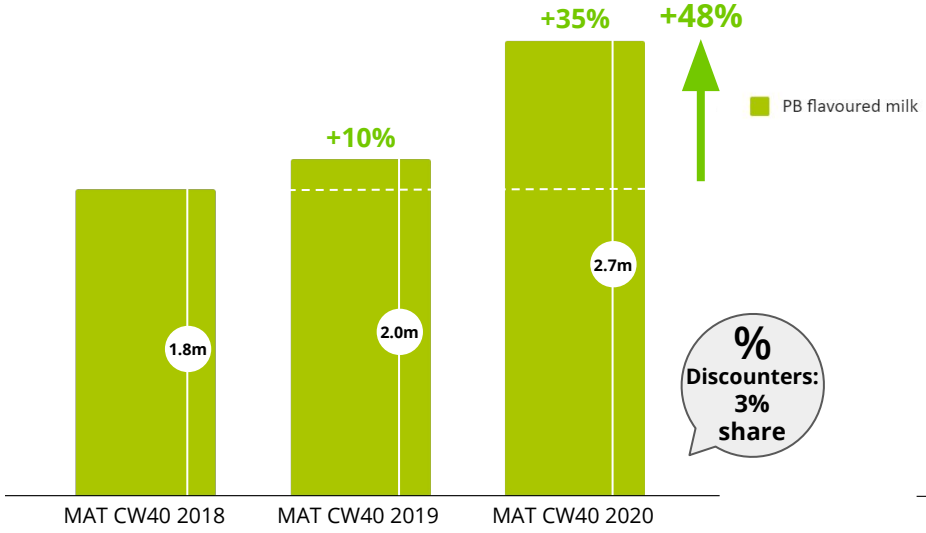
Source: Nielsen MarketTrack

MAT=Moving Annual Total

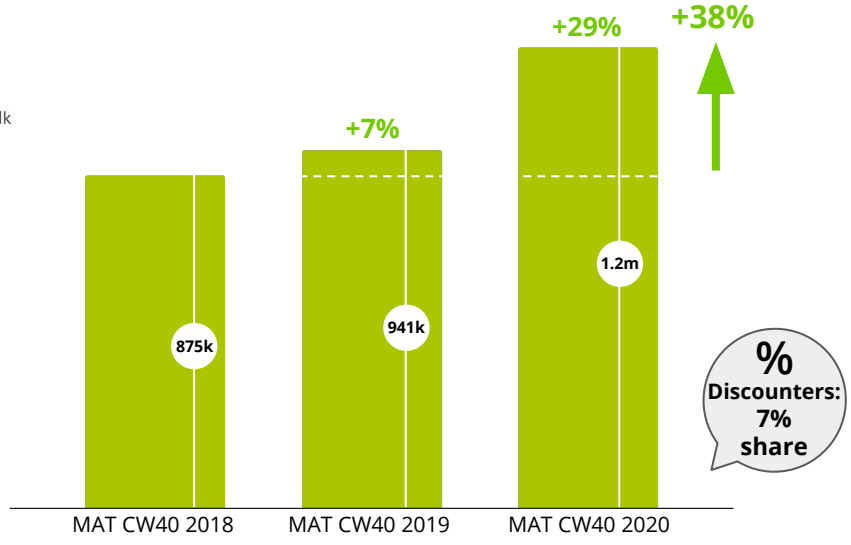
Plant-based sector deep dive: Romania
Total plant-based flavoured-milk sales

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

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



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



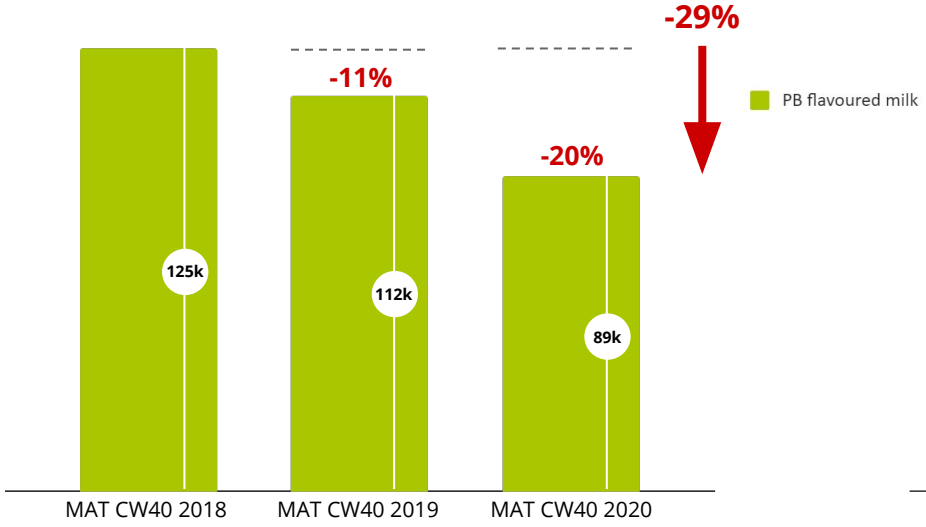
Source: Nielsen MarketTrack

MAT=Moving Annual Total

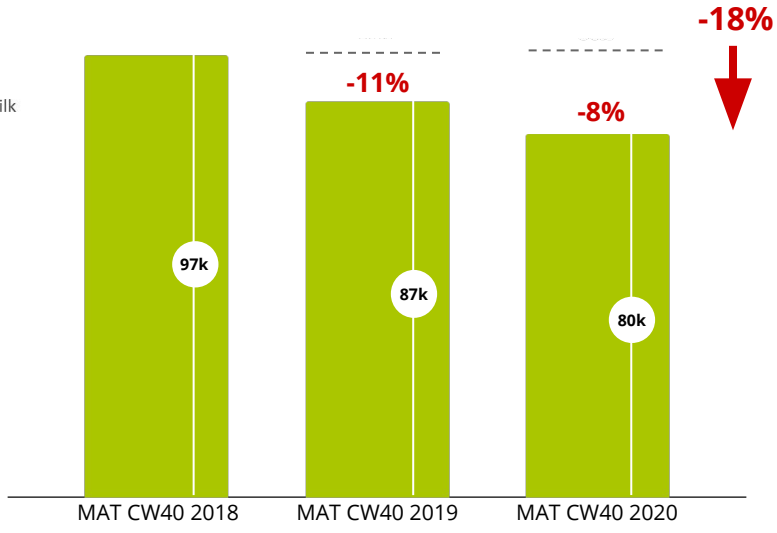
Plant-based sector deep dive: Romania
Discounters' PB flavoured-milk sales

% 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

smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

Spain

www.smartproteinproject.eu

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'.

Source: Nielsen MarketTrack

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.

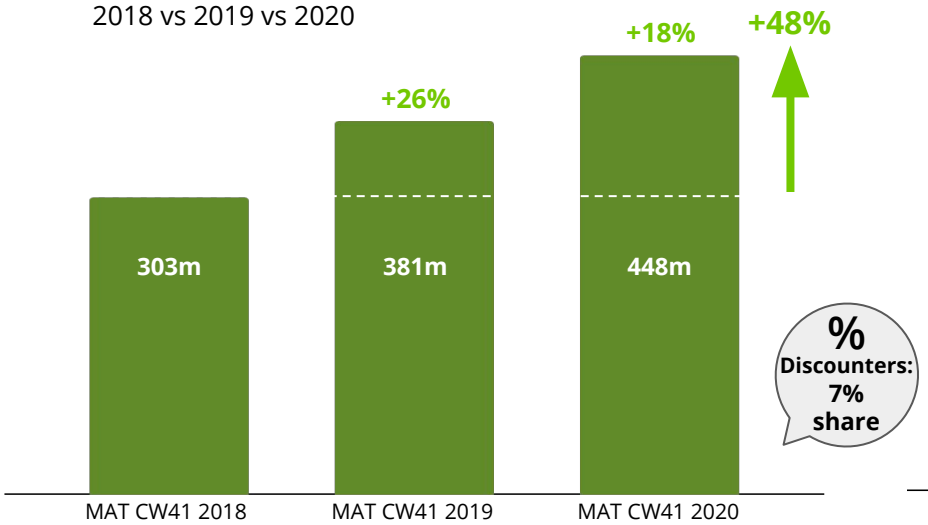
*Includes plant-based meat (vegan and vegetarian), plant-based milk, plant-based yoghurt; all numbers refer to MAT CW41 2020 if not stated otherwise.

Source: Nielsen MarketTrack

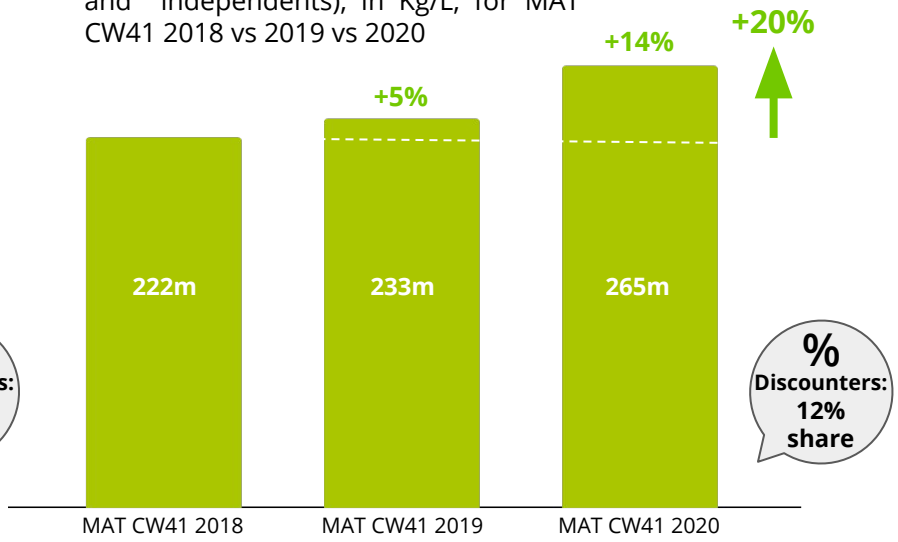
Plant-based sector overview: Spain
Total sales value and sales volume

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

Sales value of plant-based food* in Spain (hypermarkets, supermarkets, and independents), in €, for MAT CW41 2018 vs 2019 vs 2020



Sales volume of plant-based food* in Spain (hypermarkets, supermarkets, and independents), in Kg/L, for MAT CW41 2018 vs 2019 vs 2020



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

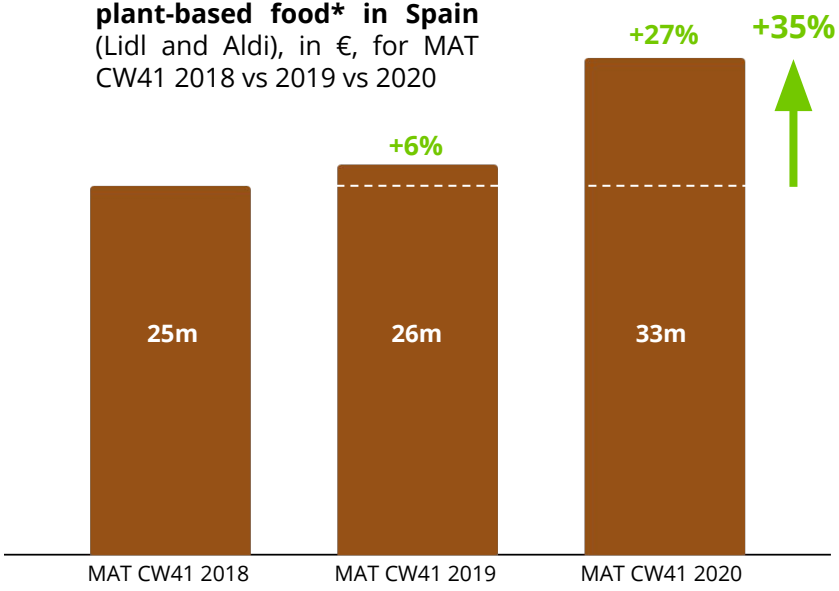
Source: Nielsen MarketTrack

MAT=Moving Annual Total

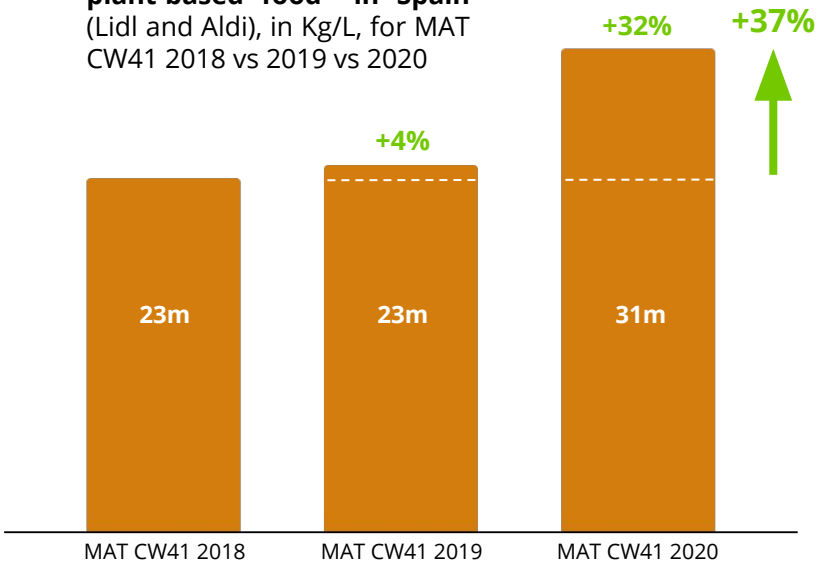
Plant-based sector overview: Spain
Discounters' sales value and sales volume

Discounters experienced even stronger growth over the past two periods.

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



Discounters' sales volume of plant-based food* in Spain (Lidl and Aldi), in Kg/L, for MAT CW41 2018 vs 2019 vs 2020



*Plant-based milk, plant-based yoghurt

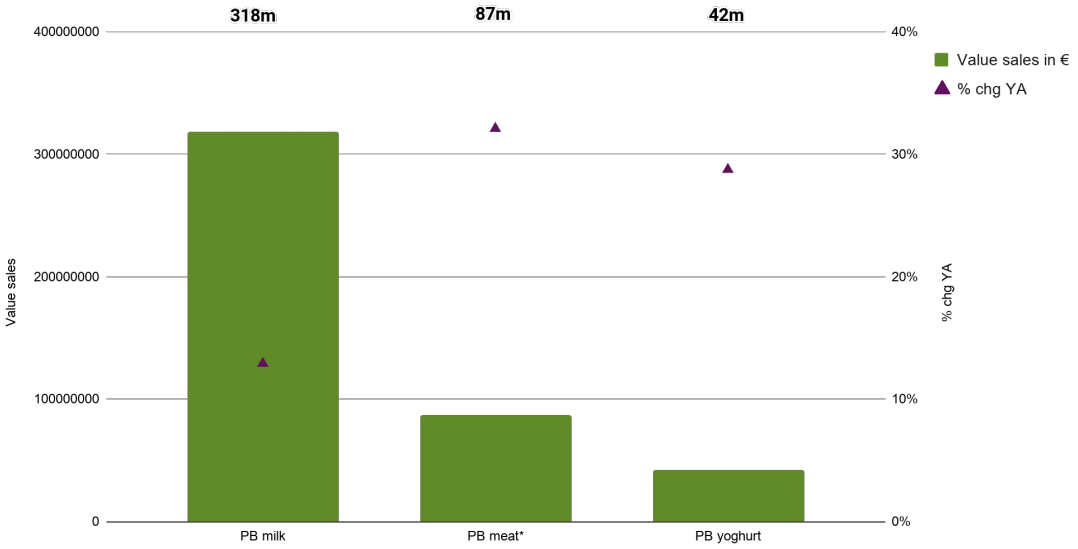
Source: Nielsen MarketTrack

MAT=Moving Annual Total

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



*Vegan and vegetarian

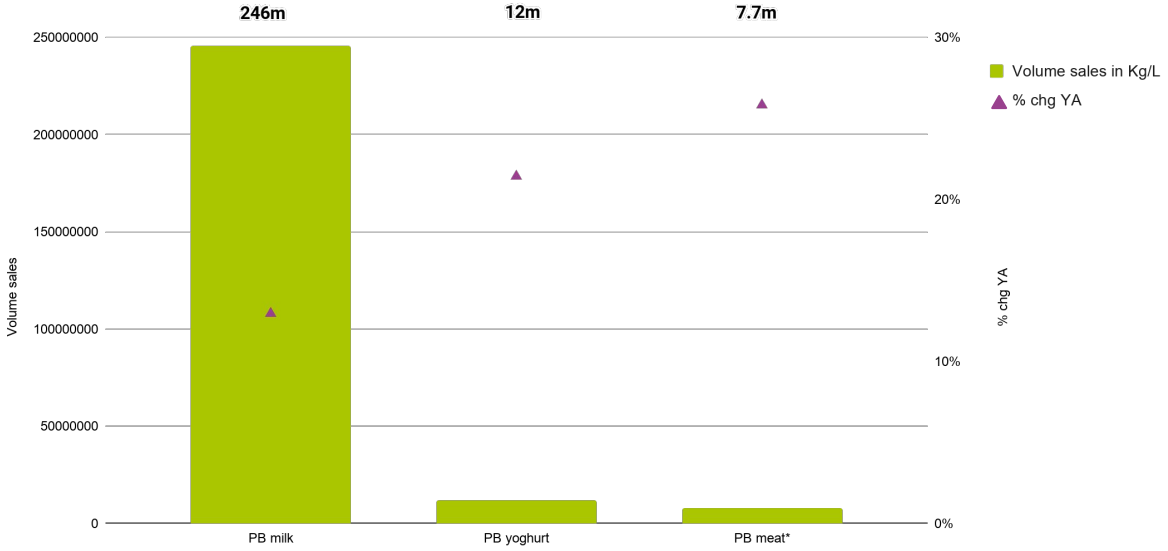
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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



*Vegan and vegetarian

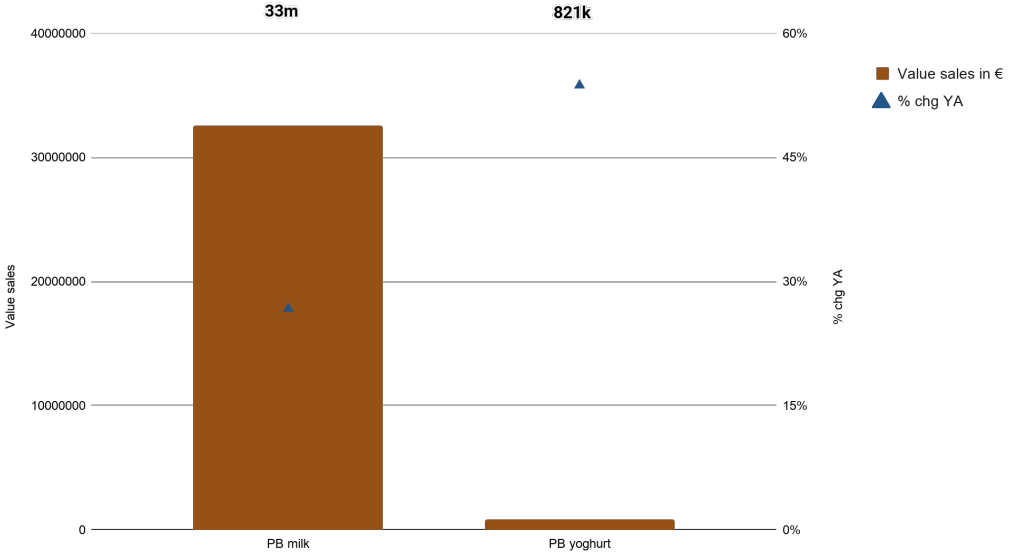
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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



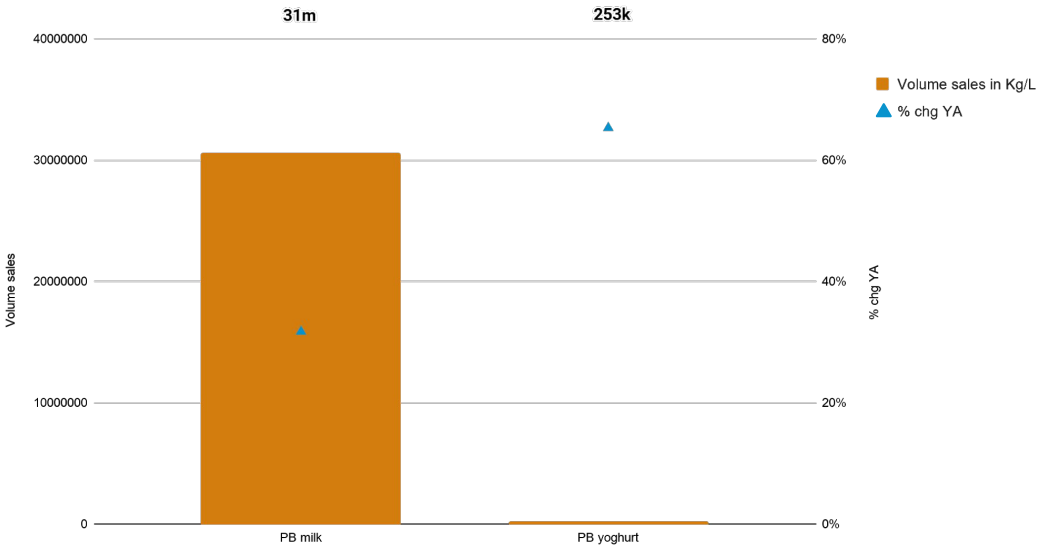
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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-Based

smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

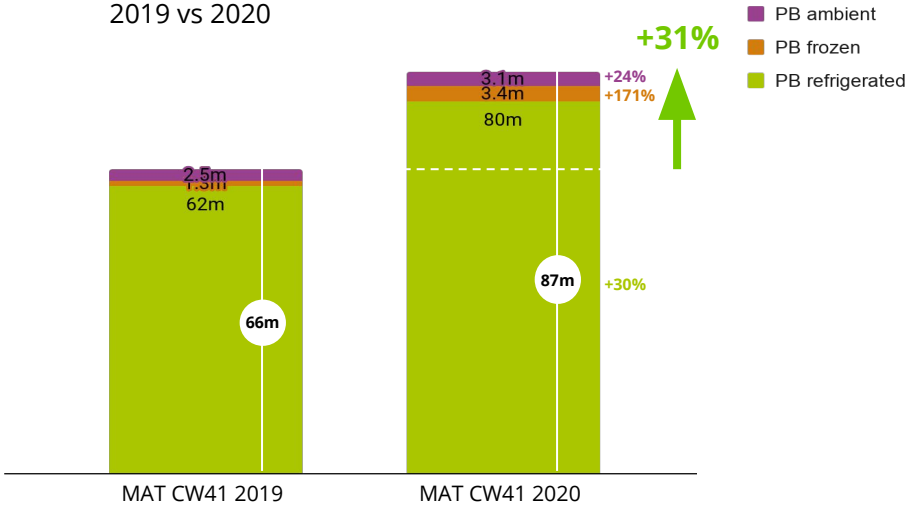
Plant-based sector deep dive: Spain

www.smartproteinproject.eu

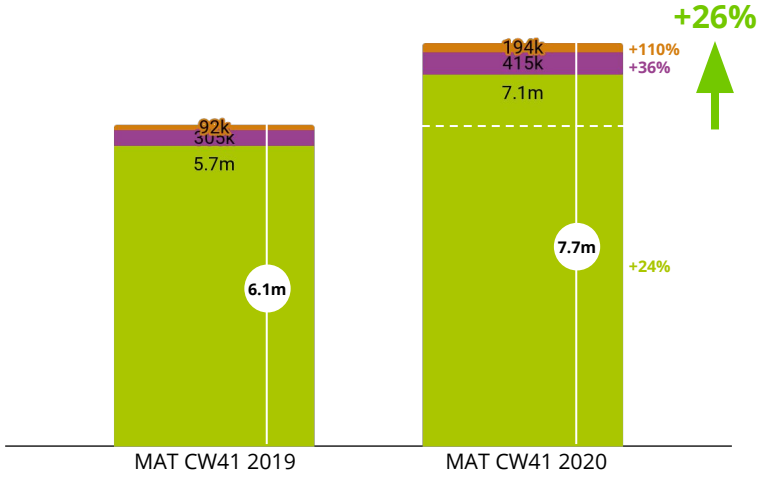
Plant-based sector deep dive: Spain
Total plant-based-meat sales

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

Sales value of plant-based meat* in Spain (hypermarkets, supermarkets, and independents), in €, for MAT CW41 2019 vs 2020



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



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

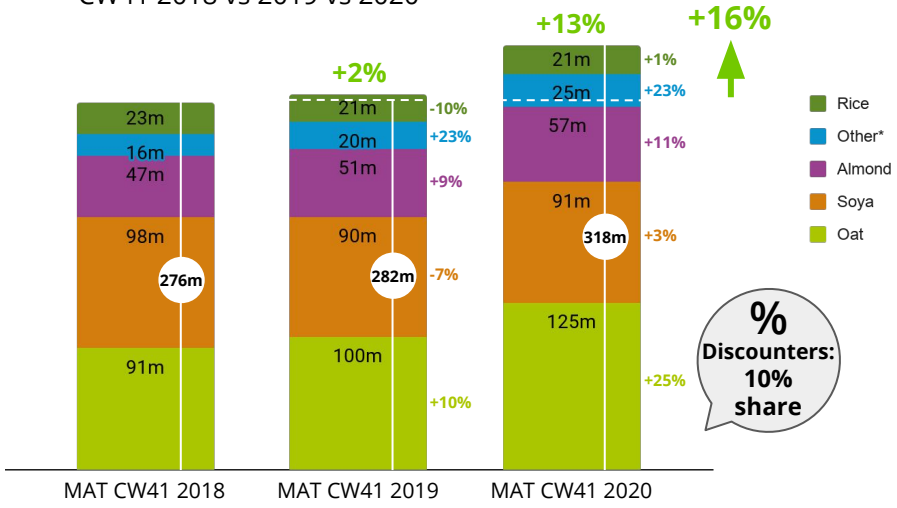
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

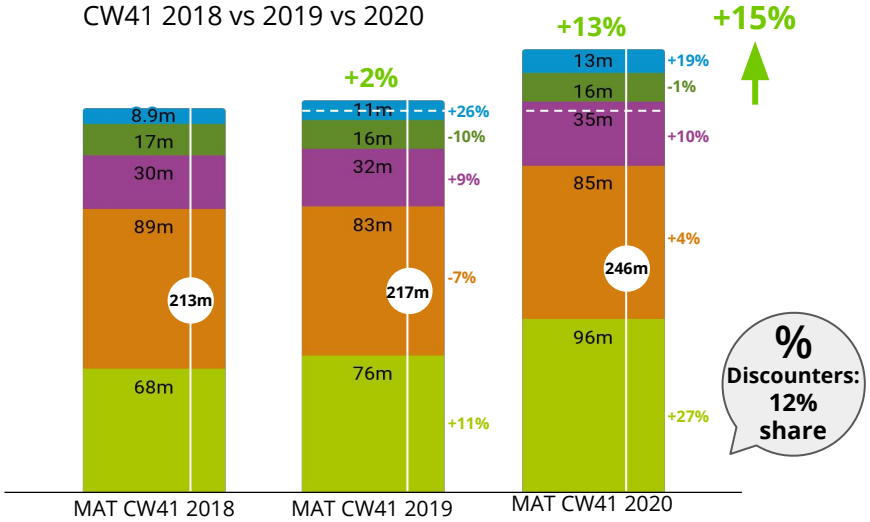
Plant-based sector deep dive: Spain
Total plant-based-milk sales

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

Sales value of plant-based milk in Spain (hypermarkets, supermarkets, and independents), in €, for MAT CW41 2018 vs 2019 vs 2020



Sales volume of plant-based milk in Spain (hypermarkets, supermarkets, and independents), in Kg/L, for MAT CW41 2018 vs 2019 vs 2020



*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

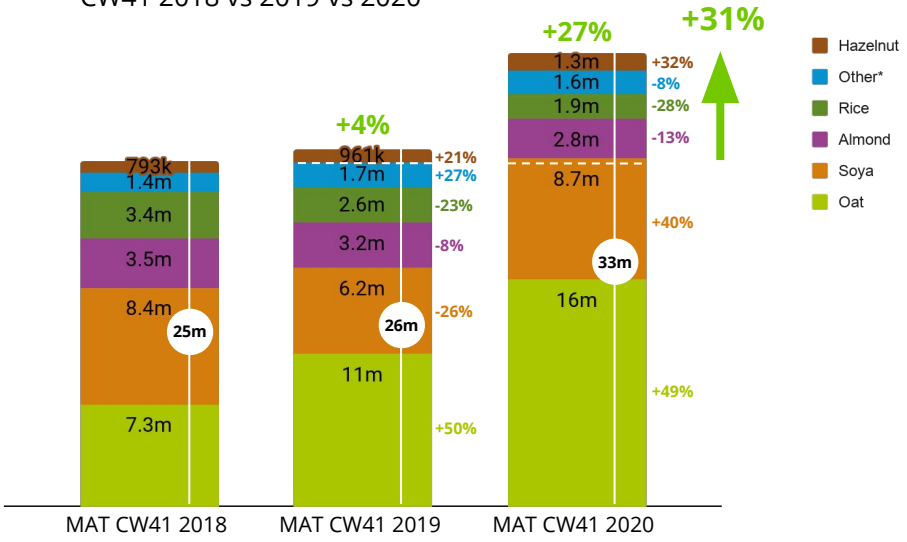
Source: Nielsen MarketTrack

MAT=Moving Annual Total

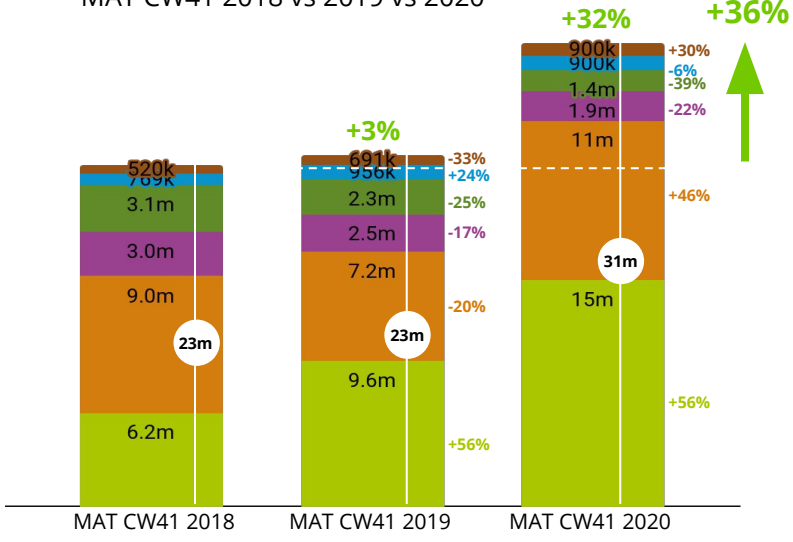
Plant-based sector deep dive: Spain
Discounters' plant-based-milk sales

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



Discounters' sales volume of plant-based milk in Spain (Lidl and Aldi), in Kg/L, for MAT CW41 2018 vs 2019 vs 2020



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

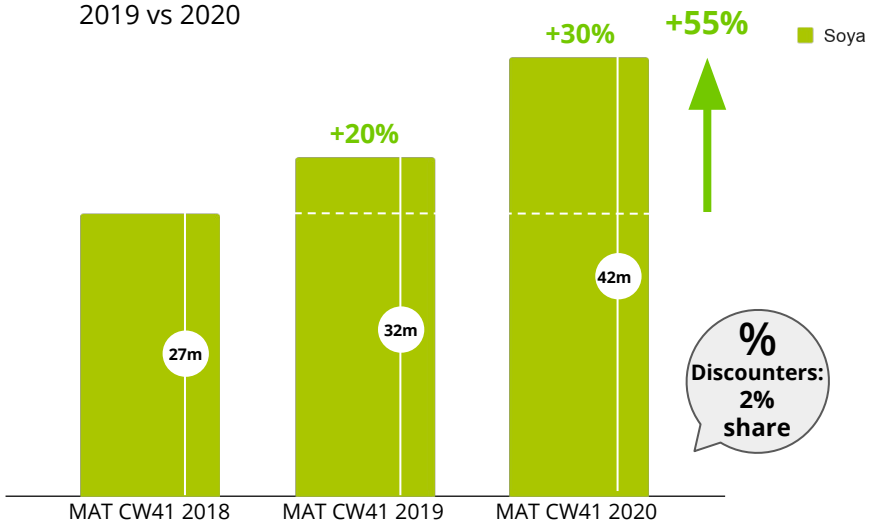
Source: Nielsen MarketTrack

MAT=Moving Annual Total

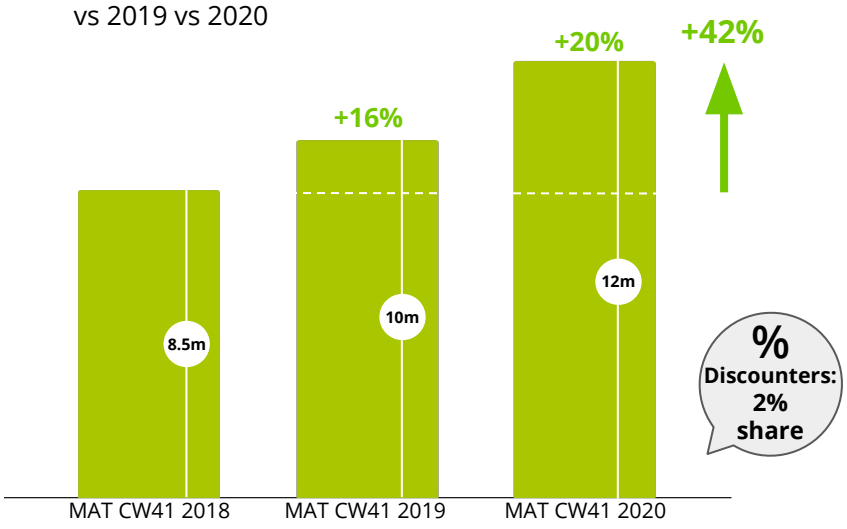
Plant-based sector deep dive: Spain
Total plant-based-yoghurt sales

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

Sales value of plant-based yoghurt in Spain (hypermarkets, supermarkets, and independents), in €, for MAT CW41 2018 vs 2019 vs 2020



Sales volume of plant-based yoghurt in Spain (hypermarkets, supermarkets, and independents), in Kg/L, for MAT CW41 2018 vs 2019 vs 2020



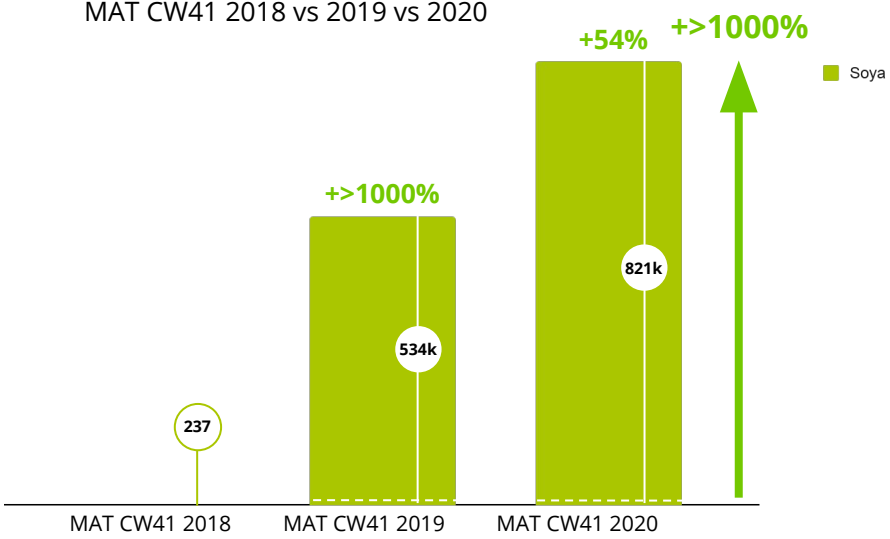
Source: Nielsen MarketTrack

MAT=Moving Annual Total

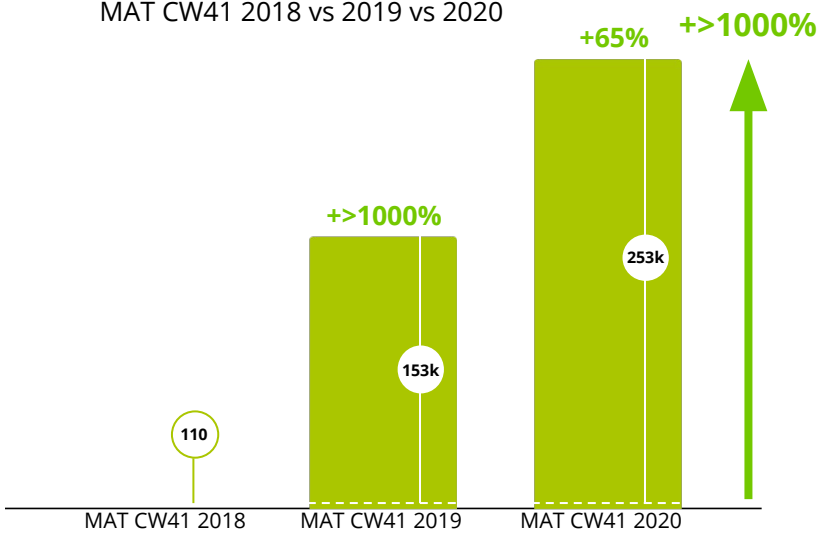
Plant-based sector deep dive: Spain
Discounters' plant-based-yoghurt sales

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

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



Discounters' sales volume of plant-based yoghurt in Spain (Lidl and Aldi), in Kg/L, for MAT CW41 2018 vs 2019 vs 2020



Source: Nielsen MarketTrack

MAT=Moving Annual Total

smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

United Kingdom

www.smartproteinproject.eu

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)

*No discount data available in UK **Plant-based food categories shown here are the plant-based food categories that were available at the time of purchase.

Source: Nielsen MarketTrack

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

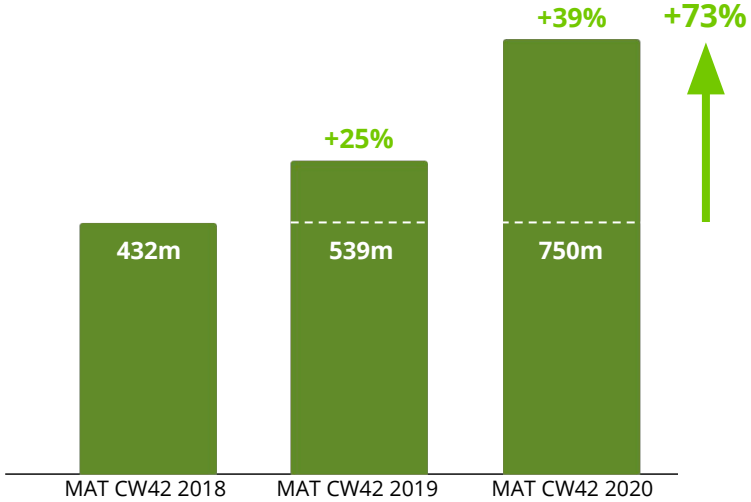
*Includes plant-based meat (vegan and vegetarian), plant-based milk, plant-based yoghurt, plant-based cheese, plant-based ice cream; all numbers refer to MAT CW42 2020 if not stated otherwise

Source: Nielsen MarketTrack

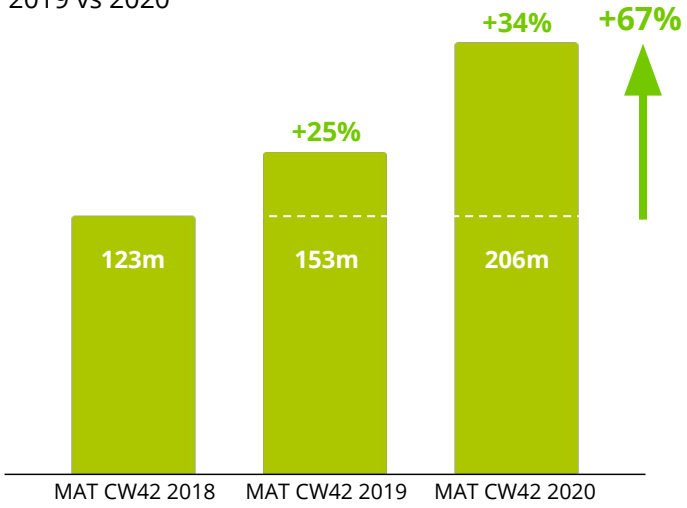
Plant-based sector overview: UK
Total sales value and sales volume

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 2019 vs 2020



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

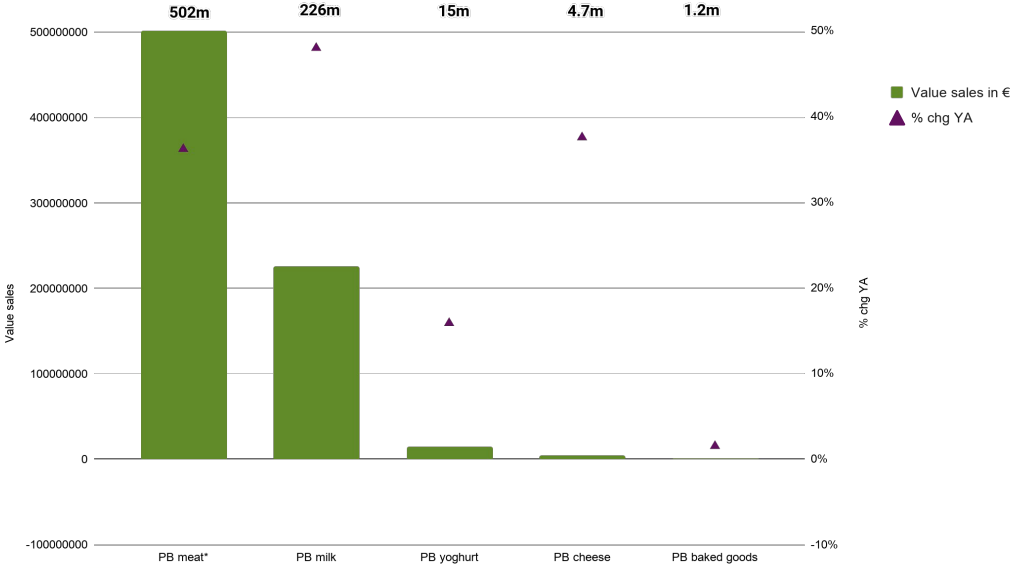
Source: Nielsen MarketTrack

MAT=Moving Annual Total

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

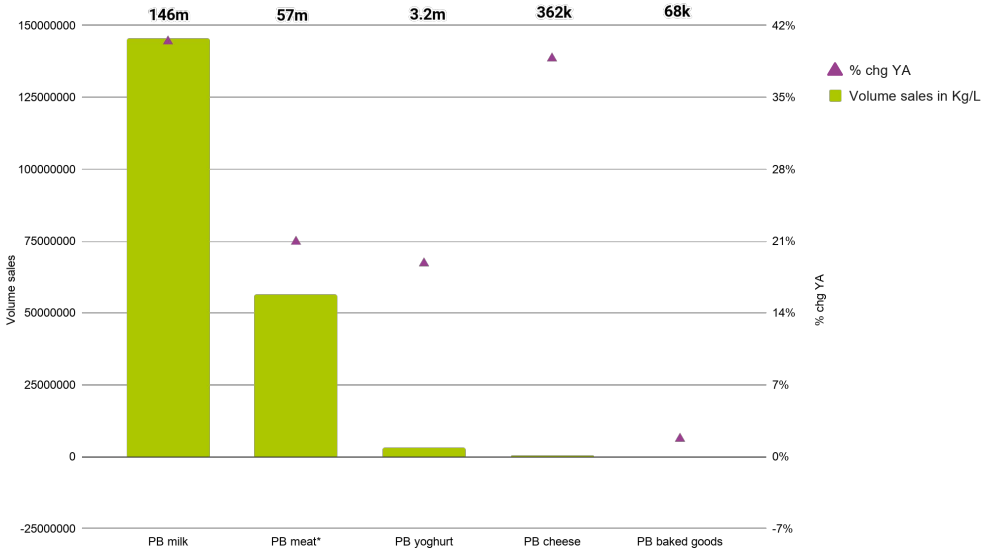
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

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



*Vegan and vegetarian

Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

smart protein

The Smart Protein project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 862957

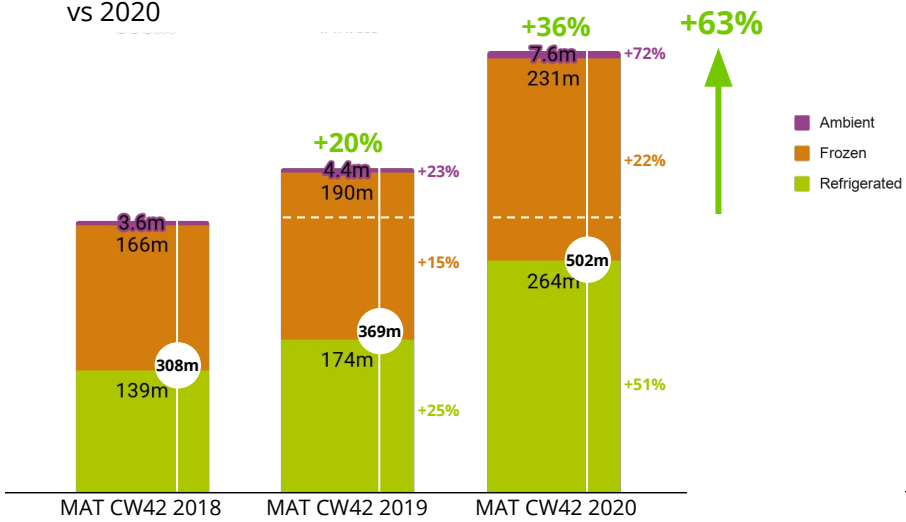
Plant-based sector deep dive: UK

www.smartproteinproject.eu

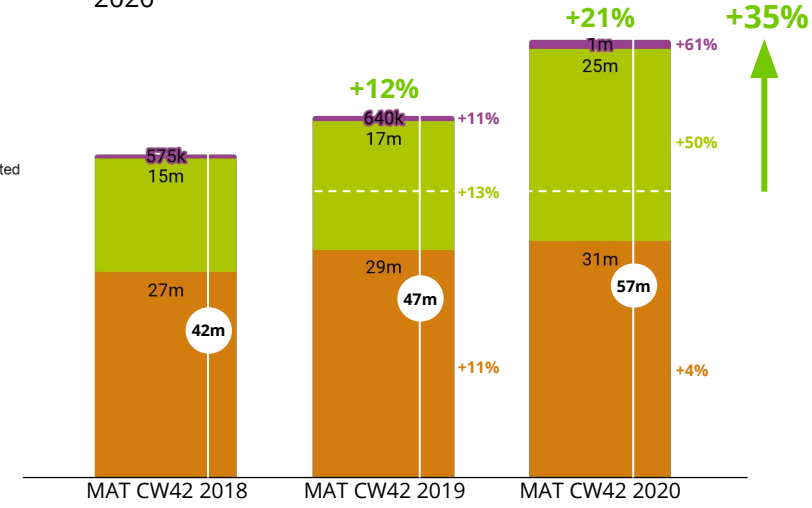
Plant-based sector deep dive: UK
Total plant-based-meat sales

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 vs 2020



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 2020



*Vegan and vegetarian

Source: Nielsen MarketTrack

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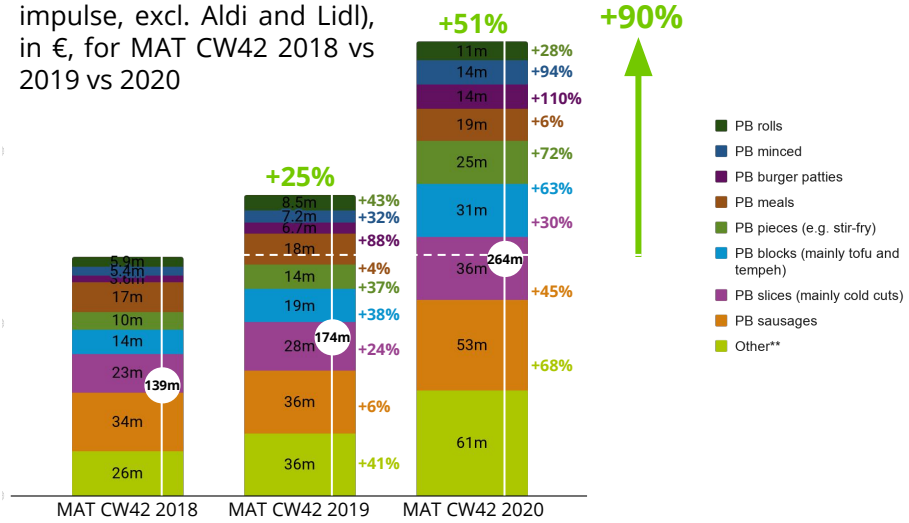
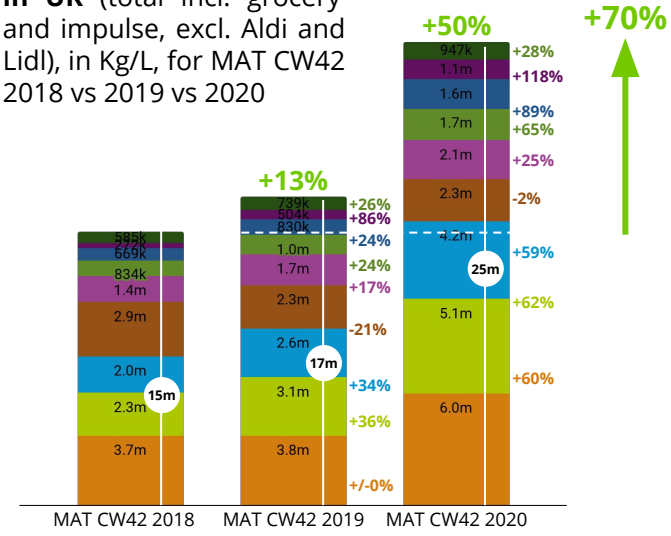
Plant-based sector deep dive: UK
Total plant-based refrigerated-meat sales

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

Sales value of plant-based refrigerated meat* 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 refrigerated 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 meatballs, steak, escalopes, pie, fillet, bites, kiev, nuggets, chunks, strips, falafel, tofu, and other

Source: Nielsen MarketTrack

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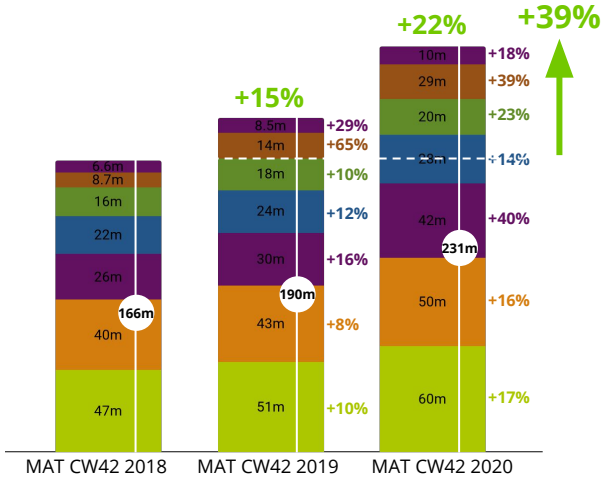
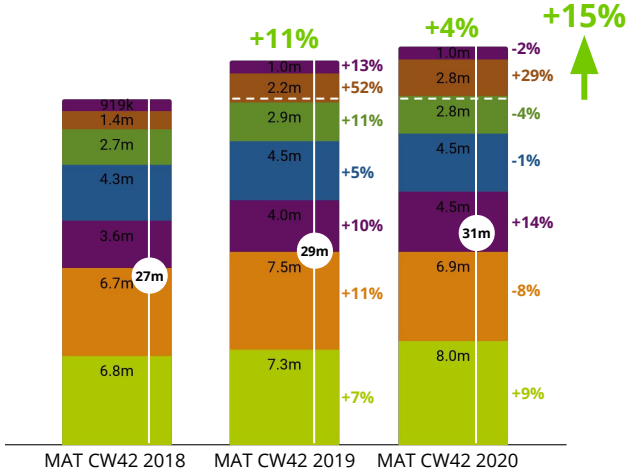
Plant-based sector deep dive: UK
Total plant-based frozen-meat sales

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



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

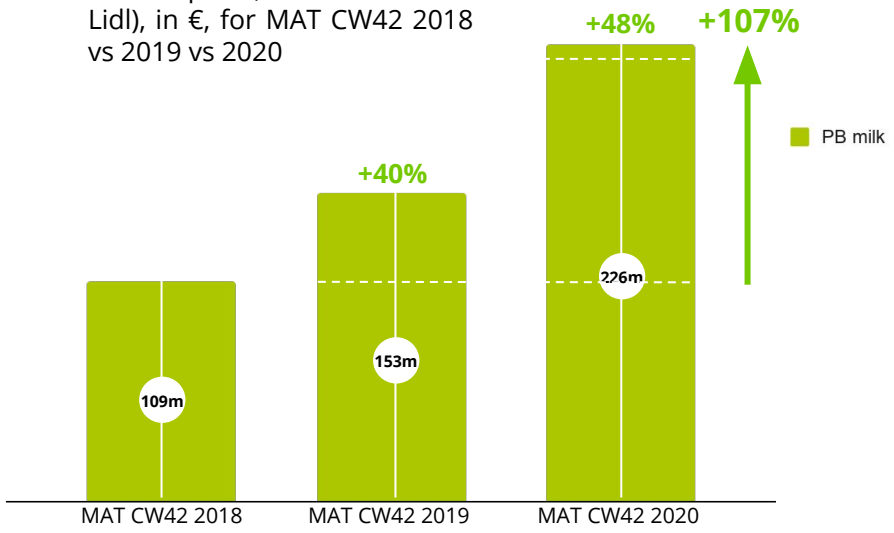
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

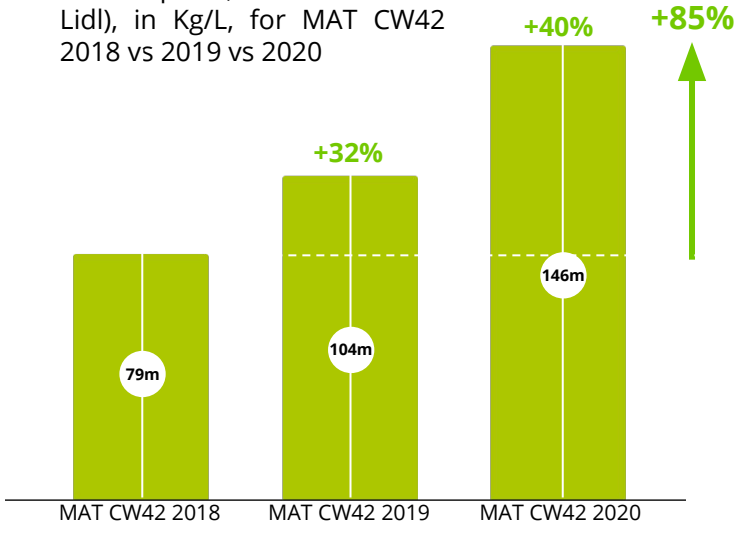
Plant-based sector deep dive: UK
Total plant-based-milk sales

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

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



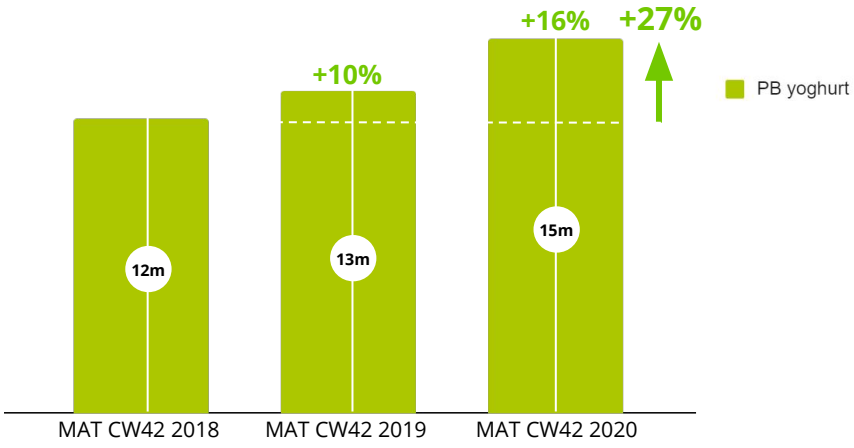
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

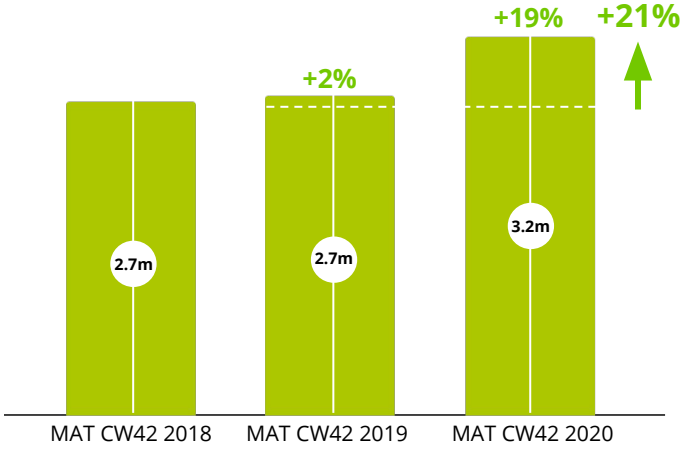
Plant-based sector deep dive: UK
Total plant-based-yoghurt sales

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



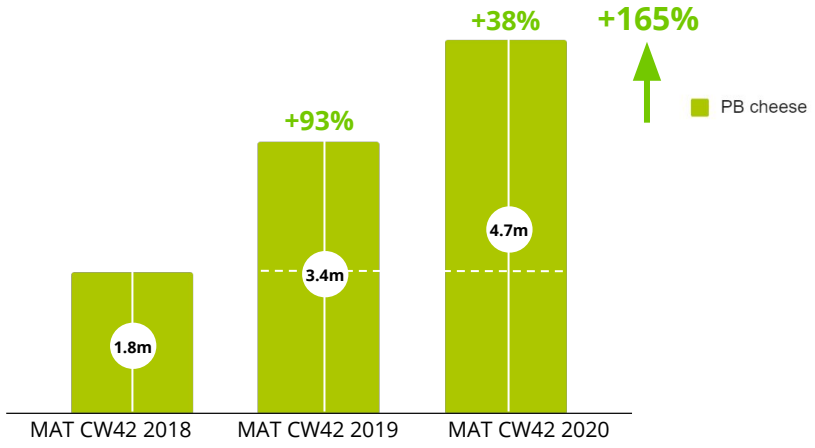
Source: Nielsen MarketTrack

MAT=Moving Annual Total PB=Plant-Based

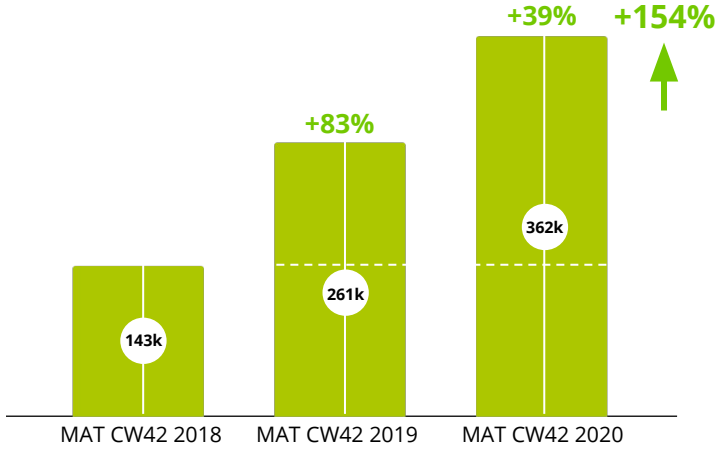
Plant-based sector deep dive: UK
Total plant-based-cheese sales

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



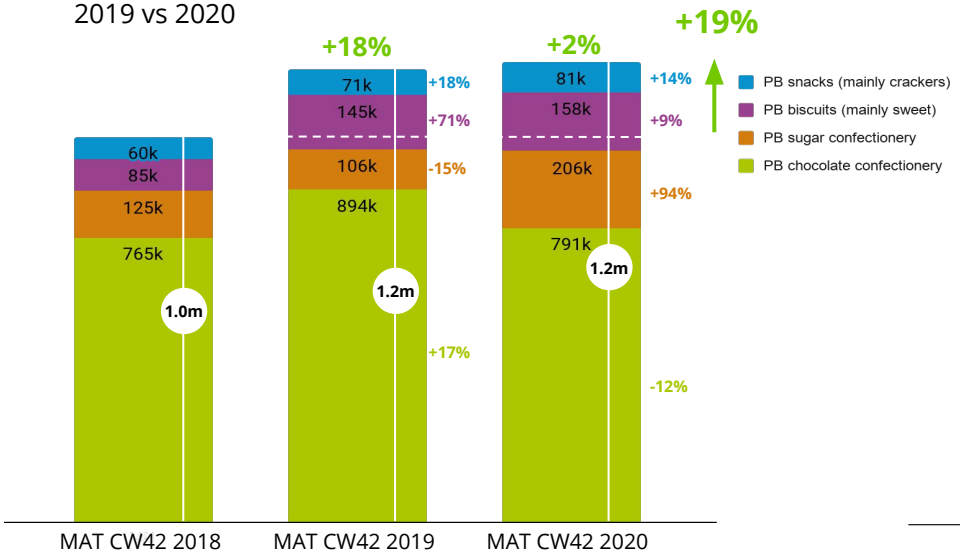
Source: Nielsen MarketTrack

MAT=Moving Annual Total

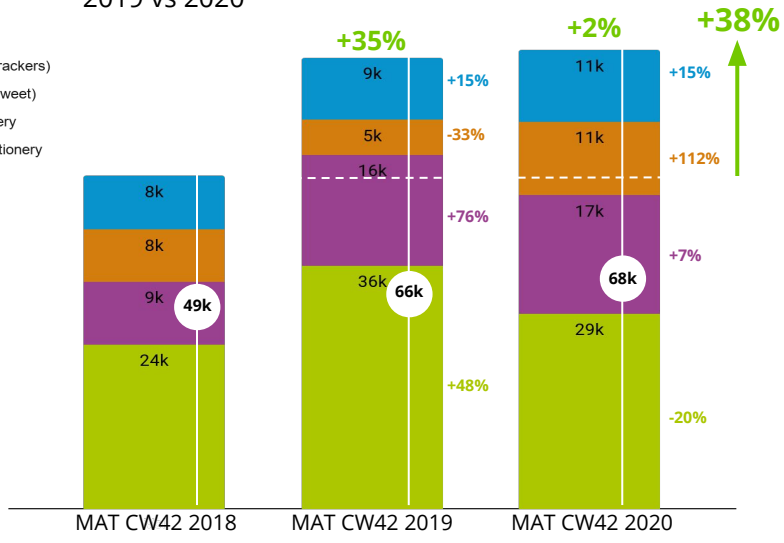
Plant-based sector deep dive: UK
Total plant-based-baked-goods sales

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

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



Source: Nielsen MarketTrack

MAT=Moving Annual Total

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Presentation managed and compiled by
ProVeg International and the University of Copenhagen.
Contact: corporate@proveg.com

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Thank you!

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