



VEGAN TREND

Perspective for Foodservice

Daymon

Defining the Vegan Trend

According to the Vegan Society *"Veganism is a philosophy and way of living which seeks to exclude—as far as is possible and practicable—all forms of exploitation of, and cruelty to, animals for food, clothing or any other purpose; and by extension, promotes the development and use of animal-free alternatives for the benefit of animals, humans, and the environment."*

Is Vegan the same as Plant-Based?

Although the terms Vegan and Plant-Based are often used interchangeably, they relate to different concepts. A **"plant-based" diet is one that consists entirely or largely of plant foods.** Hence, a whole food, plant-based diet also avoids processed foods. On the other hand, **"Vegan" means that animals are not used in the food, goods, or lifestyle decisions.** Hence, a vegan diet may incorporate processed foods if they do not contain animal ingredients. **Vegan products usually have a third-party certification.**

Vegan Certifications Examples



Veganism in Europe

The vegan population worldwide is estimated to 1.1%, reaching 3.2% in Europe. Interestingly, the market for vegan products is much larger, with **48.5% of European consumers admitting to consuming vegan products in 2023** at least once every week.

Indeed, Vegan products have gained more popularity in recent years, thanks to emerging dietary trends such as flexitarians. In Europe, **the launch of new vegan options on shelf has increased by 6%** compared to the previous year.

The trend towards veganism is also influencing the food industry, with many restaurants and hotels now offering vegan dishes on their menus. In fact, the searches for "**vegan food near me**" on Google have increased by over 500% in 2021.

2023	% Vegan Consumers	% Consumers who eat Vegan products at least once a week
Belgium	1.2%	43.2%
Czech Republic	1.4%	49.1%
Denmark	2.0%	44.1%
France	1.3%	46.6%
Germany	2.0%	48.3%
Greece	0.8%	48.2%
Hungary	0.8%	38.1%
Ireland	1.8%	43.6%
Italy	1.2%	53.9%
Netherlands	2.5%	44.3%
Poland	1.4%	51.7%
Portugal	0.8%	41.0%
Romania	2.1%	54.9%
Spain	2.0%	54.9%
Sweden	2.6%	46.8%
Switzerland	1.2%	55.4%
United Kingdom	2.2%	47.1%

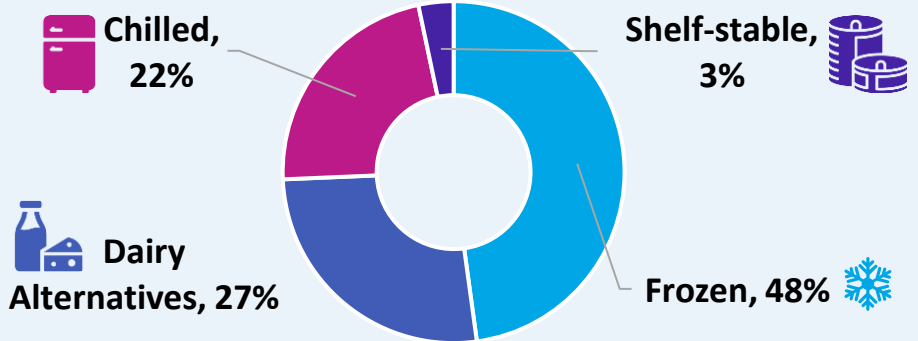
Vegan Product Offer in European Foodservice Wholesalers

In Europe, foodservice wholesalers are now offering a wide selection of vegan options to their customers, with **dairy, meat, and seafood substitutes** being the first categories of choice, across storage types.

DAIRY, MEAT AND SEAFOOD SUBSTITUTES

AVERAGE SKUs

#81 per retailer



	total	PB	PB	NB	
	4	<input checked="" type="checkbox"/>	PB	12.2€	17.9€
	1	<input checked="" type="checkbox"/>	PB	1.2€	4.9€
	5	<input checked="" type="checkbox"/>	PB	12.0€	14.6€
	1				3.4€
AVERAGE #BRANDS					AVERAGE PRICE/KG

Private Brand brings an **affordable alternative** to National Brands across segments, being 31% more affordable on average in Frozen and 18% in Chilled.

FOODSERVICE BENCHMARK



LARGER OFFER

29% of the SKUs analyzed

PB FOCUS

Private Brand represent 52% of Bidfood NL SKUs

Private Brand in Dairy, Meat And Seafood Substitute Products

Private Brand accounts for **20% of the offer**, with a stronger focus on **frozen products**.

+31% growth in PB Dairy. Meat And Seafood Substitute SKUs vs the previous month

New Product Launches in European Foodservice Wholesalers

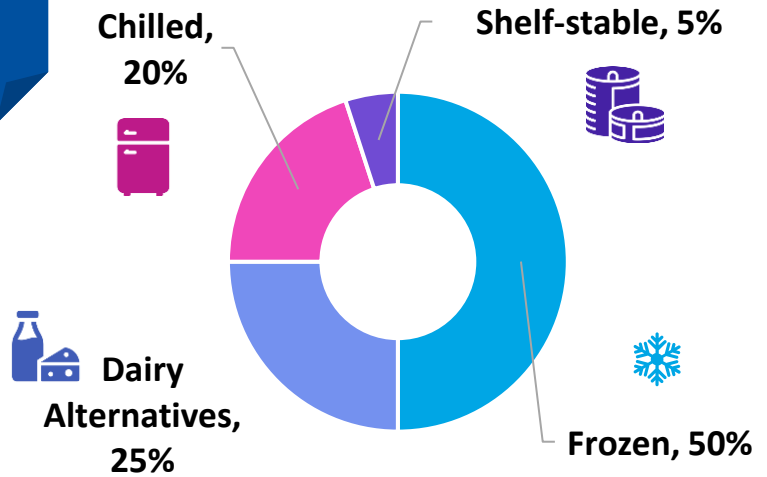
DAIRY, MEAT AND SEAFOOD SUBSTITUTES NEW PRODUCTS, OCTOBER 2023

AVERAGE NEW SKUs

#3 per operator

Ranging from 1 to 10 new products in October 2023

Private Brand % in new SKUs
30%



As represented by frozen, new product solutions target **affordability** with larger quantities in **convenient** pre-portioned boxes (for recipes with smaller rotations) as well as **cook-from-scratch** needs for chefs to own their recipes.

NEW PRODUCTS SELECTION



Bacon strips vegan
200g per box, 9 boxes,
UK

Vegan bacon strips combining a sustainable package (Cardboard) with a convenience format (9 boxes 200g)



Preparation For Italian Ice Cream Strawberry,
FR

UHT Liquid 5.5kg preparation for Vegan Italian Style Ice Cream in a bag-in Box format, targeting the home-prepared need



Organic Tofu Seara 1kg,
PT

Organic Tofu in larger pack size (1kg) to answer Ho.Re.Ca need for larger quantities than end-consumer offer

— PB — NB

Dairy, Meat and Seafood Substitutes in Foodservice Dishes in Europe

Vegetable Dishes by Restaurant Type

In Europe, Healthy food restaurants are gaining momentum, carrying on their menu healthier formulations as well as more sustainable ones. Dairy, Meat and Seafood alternatives account for a large part of their menus.

Aligned with this trend, **Quick Service Restaurants and Fast-Food businesses are also starting including Meat And Seafood Substitute products** on their menus, presenting growth compared to the previous year.

Key Vegetable Dishes in Foodservice

Falafel is a popular vegan dish in Europe. It is a deep-fried ball made of a mixture of chickpeas, fresh herbs, and spices traditionally found in Middle Eastern cuisine.

The falafel can be served with pita bread, tahini sauce, and hummus, which are all interesting complementary products to have in the assortment.



According to Global Data is the most growing component of the **Meat And Seafood Substitute dishes**. Making it an interesting offer to carry in the assortment.

Indeed, nowadays, there are **plenty of falafel products in different formats and flavours**, making it a highly convenient product for restaurants to have in their dishes.

Falafel Products in Foodservice Wholesalers

Considering the falafel product, several options can be carried to cater to the **different customer profiles and needs**, ranging from easy-to-cook solutions to more sensorial solutions, exploring new experiences.

Ready to Assemble



Falafel Mix,
Bag 1 Kg,
NL

Ready to Cook – Small Package



Falafel Balls,
Vegan 1Kg,
NL

Ready to Cook – Large Package



Vegan Falafel
Box 2Kg,
FR



Falafel Balls,
1Kg,
FR

New Shapes - Falafel Burger



Vegan Gluten-free
Falafel Burger 16un,
NL



Falafel Burger
1Kg,
FR

New Flavours and Colours



Sweet Potato
Falafel Bites, 90un,
UK



Quinoa Falafel,
30 un,
FR

Vegan News in Foodservice

Former Heston Blumenthal Chef's Shocken Foods to Hit UK Shelves for Christmas



Shocken Foods, an award-winning UK plant-based deli meat maker, is ready to debut its revolutionary plant-based deli items before Christmas. The company was founded as Veganly Deli and later rebranded to Shocken Foods by **Emma Bowe, a well-known and recognized chef who turned into a vegan food tech entrepreneur,** and Peter Kalkowsky, a professional caterer

and former senior management at a worldwide organization. Aside from **deli classics,** Shocken Foods also sells a **premium vegan foie gras pate, a spicy and spreadable vegan 'Nduja, and 100% allergen-free vegan meatballs** that are touted to taste very comparable to their meat counterparts. Shocken Foods was selected Food Startup of the Year by the

National Startup Awards, and its vegan 'Nduja spread got the renowned Great Taste Award.

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Key Takeaways

Well-known chefs are following the vegan trend, by developing vegan products. Taste is key when developing vegan products, as consumers want to have delicious meals.

Vegan News in Foodservice

Burger King opens a 100% vegan restaurant



The fast-food chain, **Burger King** opened its 1st truly vegan restaurant in Lisbon, Portugal, after the success of its Bristol and London locations. The vegan pop-up started in November 2022 and lasted a month. In **collaboration with The Vegetarian Butcher**, the restaurant will provide vegan versions of the **Whopper, Big King, and**

Long Chicken throughout the experiment. All animal products have been removed from the kitchen to prevent cross-contamination. All menu items are vegan, including cheese, bacon, sweets, mayonnaise, cups, wipes, packaging, and bags. The **restaurant was remodeled to meet its ecological credentials**, with green

walls and ceilings and a vertical garden included.

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Key Takeaways


Fast-food chains are exploring the vegan trend through menus or by testing vegan concepts, answering the growing demand for vegan fast-food solutions.

Summary

Vegan is getting away from the niche segment, becoming a well-established trend among end-consumers, with many consuming vegan products at least once a week. This is turning the Vegan trend into a **sizeable opportunity** for the entire food industry, including foodservice wholesalers. Restaurants offer more and more Vegan options on their menu, therefore **looking for product solutions to enable them prepare these new Vegan recipes.**

Key Highlights

- ✓ Vegan products go **beyond Vegan lifestyle and Vegan consumers** with 48.5% of European consumers consuming vegan products at least once a week
- ✓ **Diary, Meat and Seafood** categories represent core categories to offer Vegan substitutes solutions to Ho.Re.Ca customers
- ✓ European Foodservice Wholesalers offer a **wide range of product solutions to the different needs of their customers**, from Easy to Cook to Sensorial, with a strong focus on **Frozen**
- ✓ Ho.Re.Ca. customers can find a **cost-effective and valuable alternative** to national brands through **Private Brand**, particularly when purchasing larger quantities



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For more information, please contact us
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