

VeggiFish

Potential european markets for plant-based seafood alternatives



By Felix, Aida & Nina



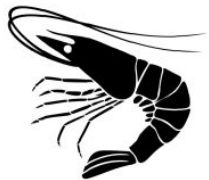
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Salmon



Lobster



Shrimp



Tuna



Flexitarians
Pescetarians
Vegetarians
Vegans

18 - 70 years



Austria
Denmark
France
Germany
Italy
Netherlands
Poland
Romania
Spain
United Kingdom

1. Which species are consumed the most in each of the selected countries?



2. Which plant-based seafood alternatives do customers want?



3. How big is the possible target group?

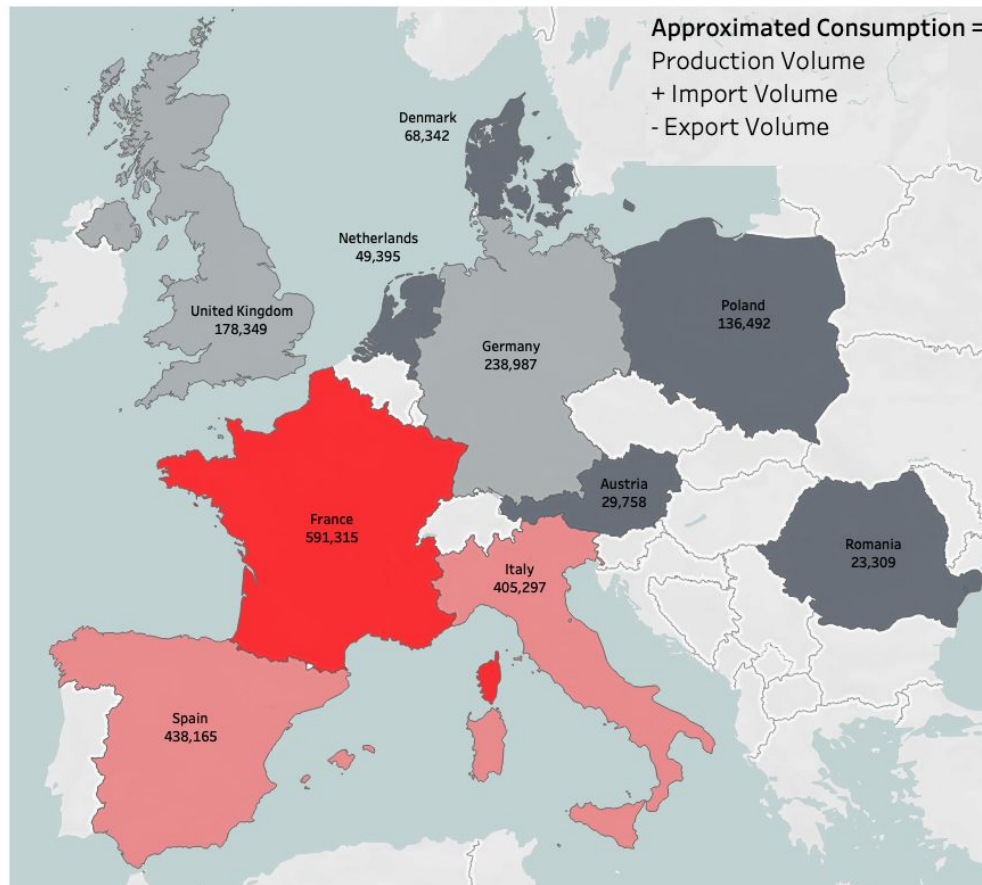
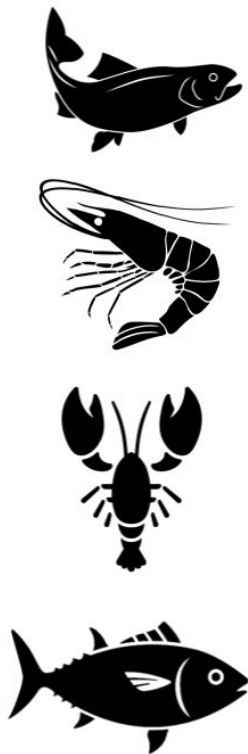


Higher fish consumption near the Mediterranean

Source: Eurostat and EUMOFA

Approx. consumption of
selected species in 2021

Unit = Tonnes

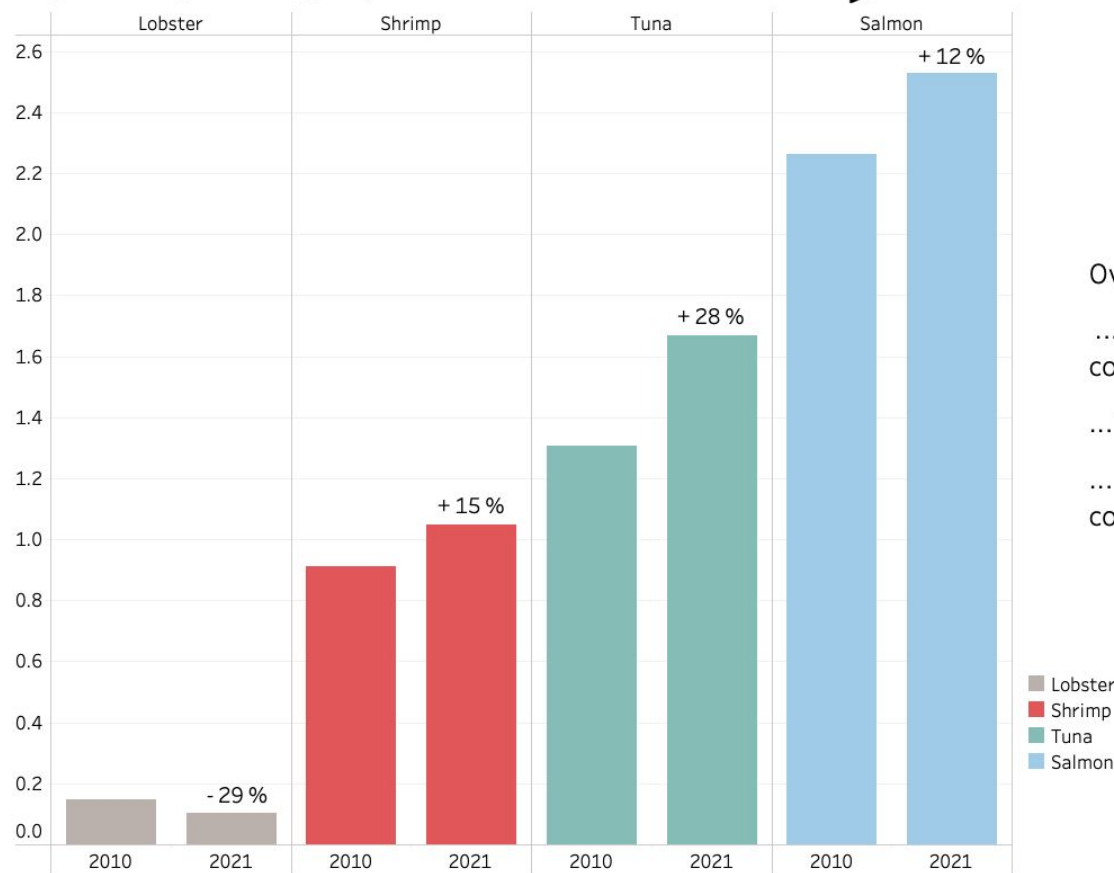


Salmon is the most consumed species

Avg. consumption in kg / capita in 2010 and 2021



Source: Eurostat and EUMOFA



Over the 10 countries...

... Salmon is the most consumed species

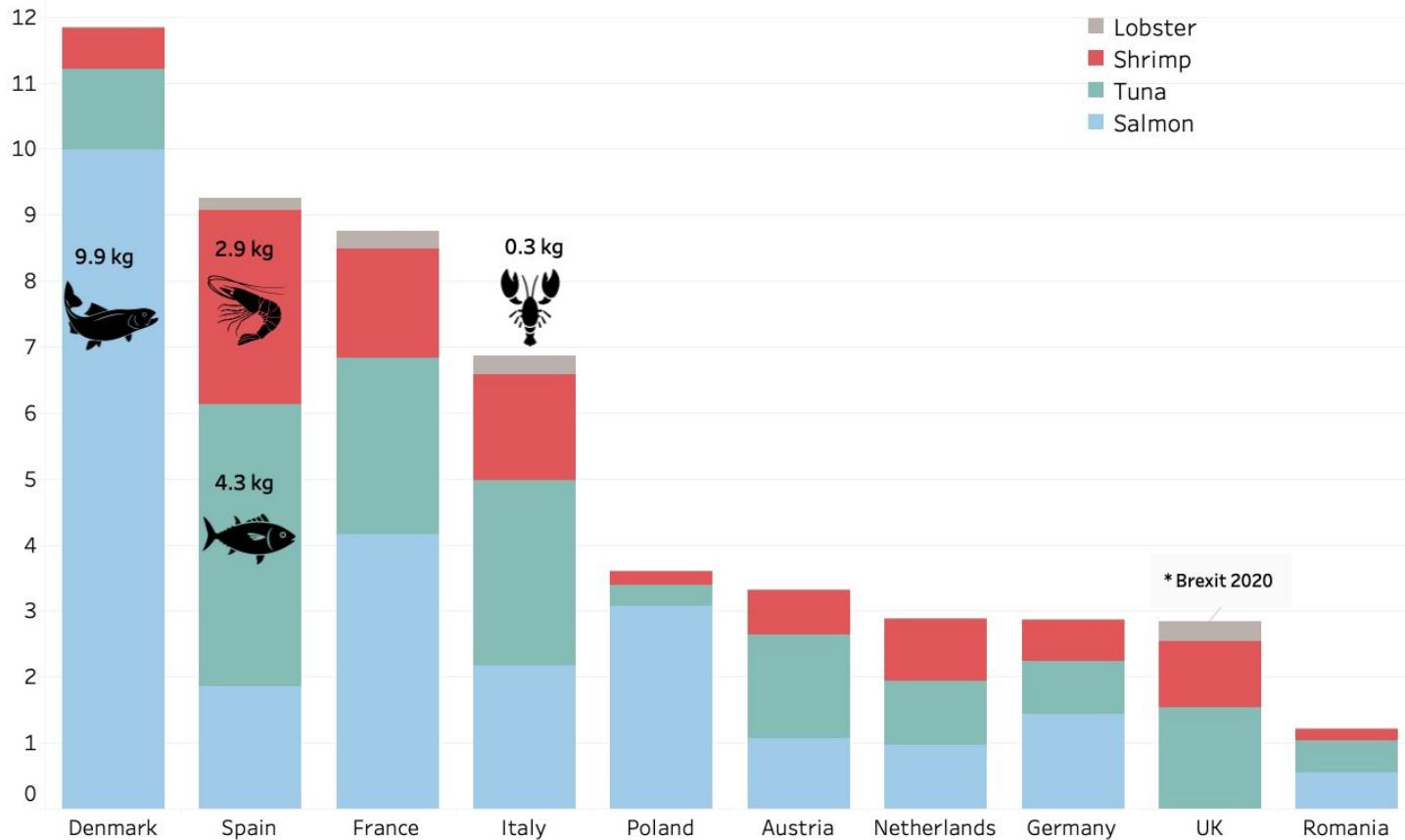
... Tuna grew the most

... Lobster is the least consumed species

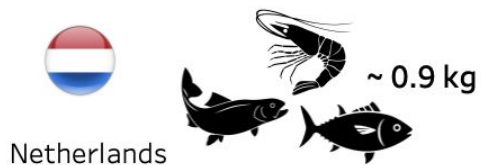
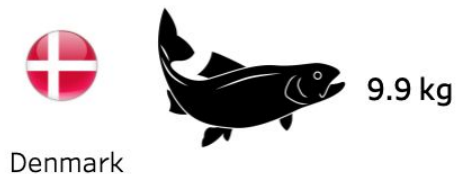
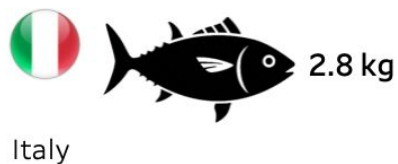
Denmark loves salmon - Spain loves tuna and shrimp

Source: Eurostat and EUMOFA

Aprox. Consumption kg/capita 2021 over total population



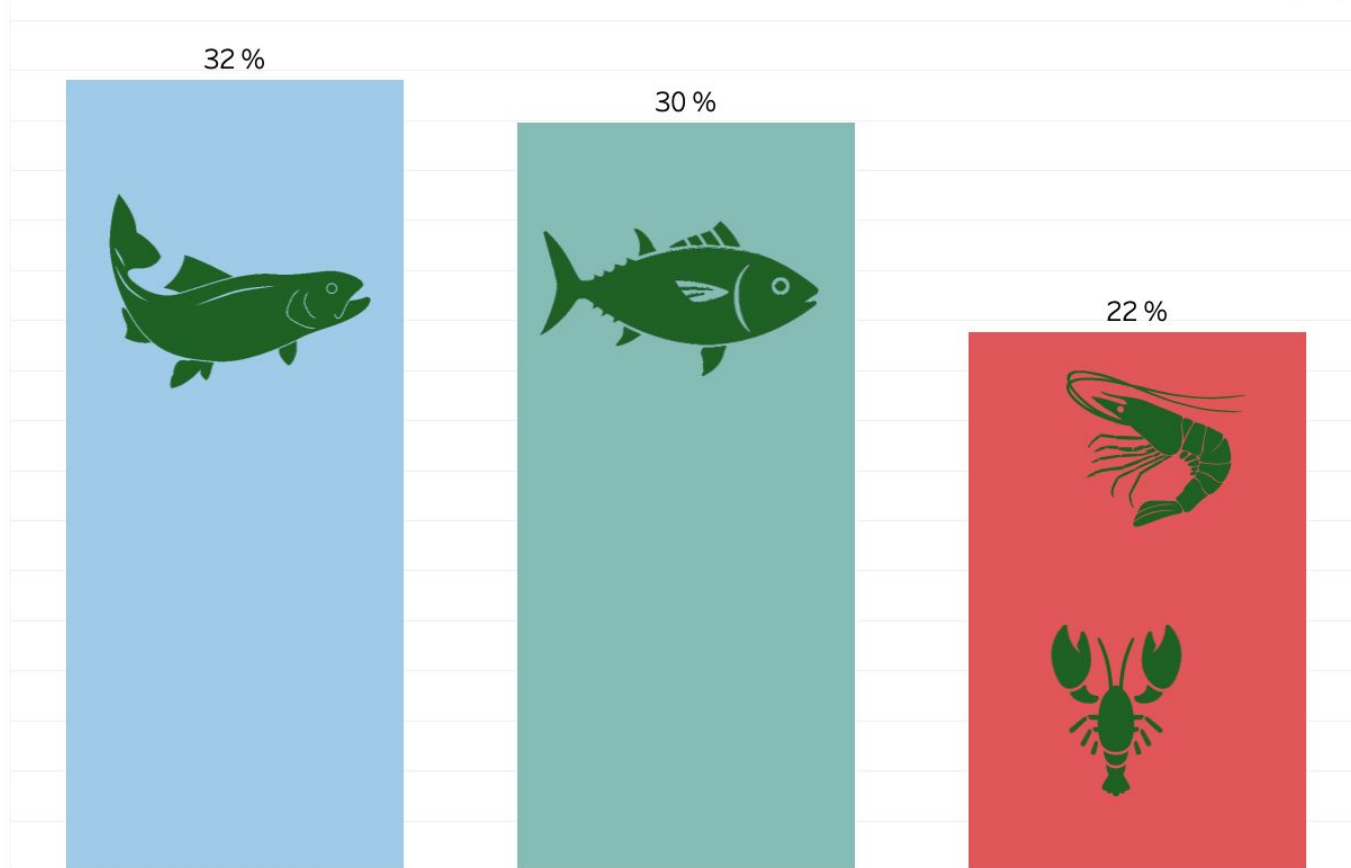
Most consumed species per country kg/ capita in 2021



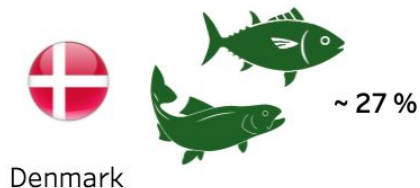
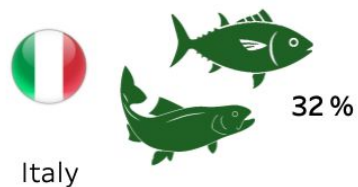
Tight win for plant-based salmon

All country average % of wanted plant-based seafood alternative

Source: 'What consumers want: A survey on European consumer attitudes towards plant-based foods. Country specific insights' www.smartproteinproject.eu (2021).



Most wanted plant-based seafood alternatives per country (18 - 70 years)

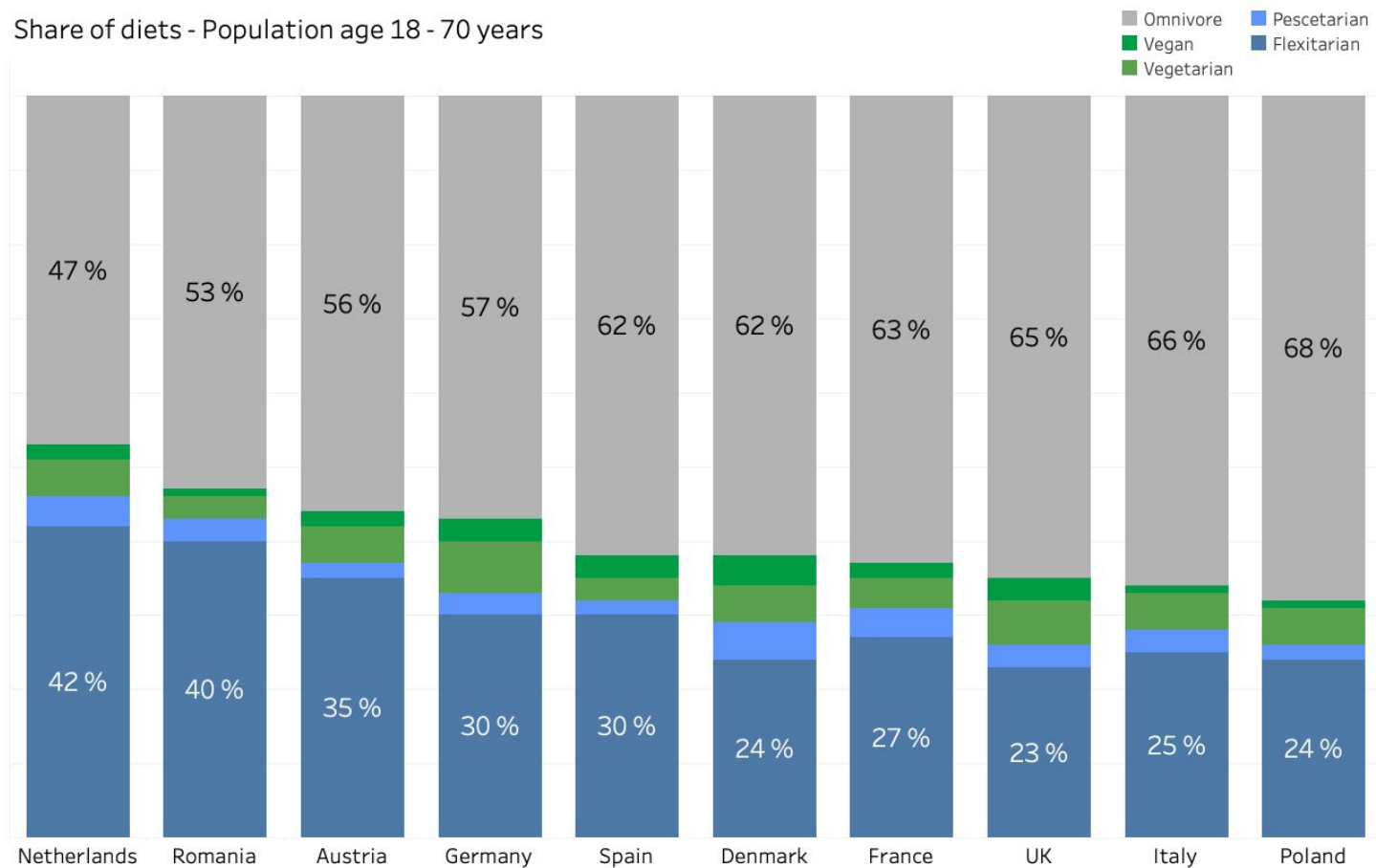


Source: 'What consumers want: A survey on European consumer attitudes towards plant-based foods. Country specific insights' www.smartproteinproject.eu (2021).

Flexitarians are the majority of the target group

Source: "What consumers want: A survey on European consumer attitudes towards plant-based foods. Country specific insights" www.smartproteinproject.eu (2021).

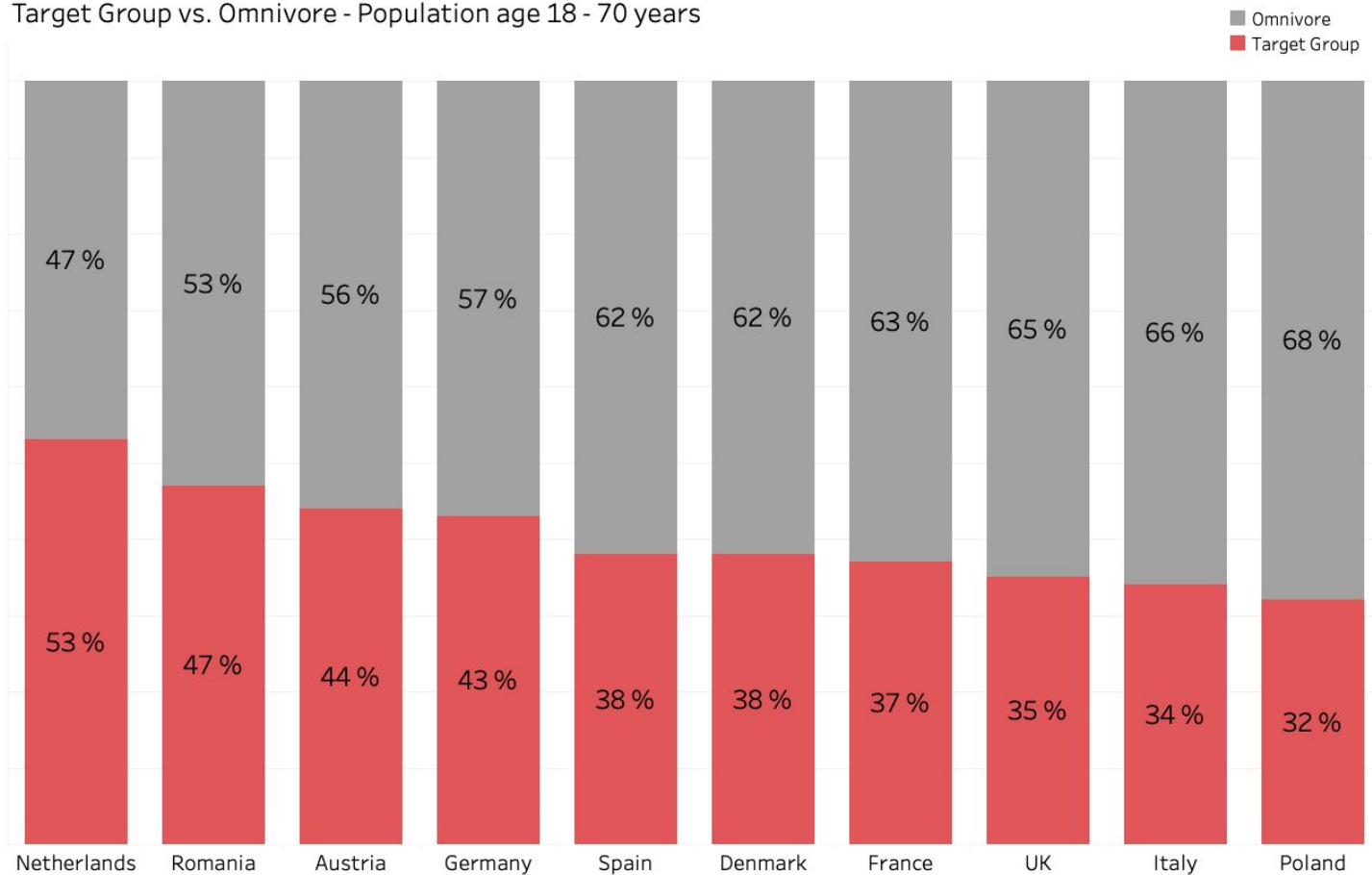
Share of diets - Population age 18 - 70 years



More than 50 % of dutch people are in target group

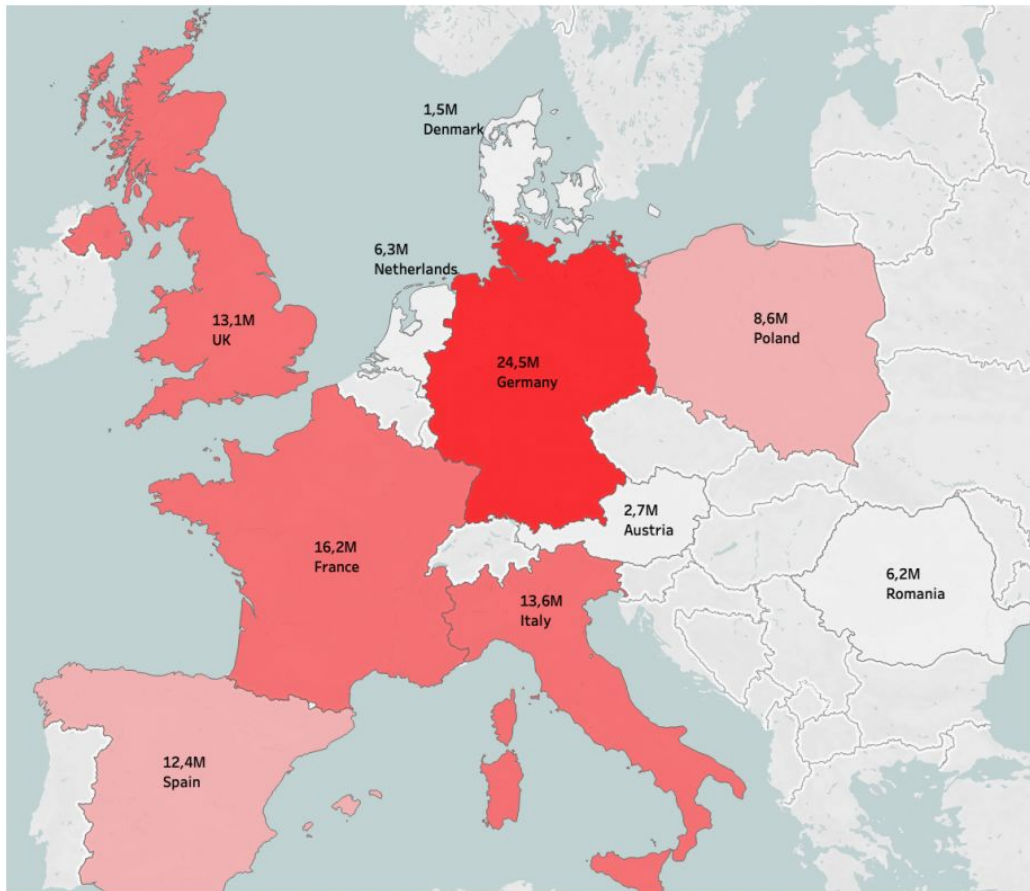
Source: 'What consumers want: A survey on European consumer attitudes towards plant-based foods. Country specific insights' www.smartproteinproject.eu (2021).

Target Group vs. Omnivore - Population age 18 - 70 years



Germany is the biggest market

Target Group Map - Population age 18 - 70 years



Big-size markets:

Mediterranean countries & UK

Mid-size markets:

Netherlands, Poland, Romania

Smallest markets:

Austria and Denmark

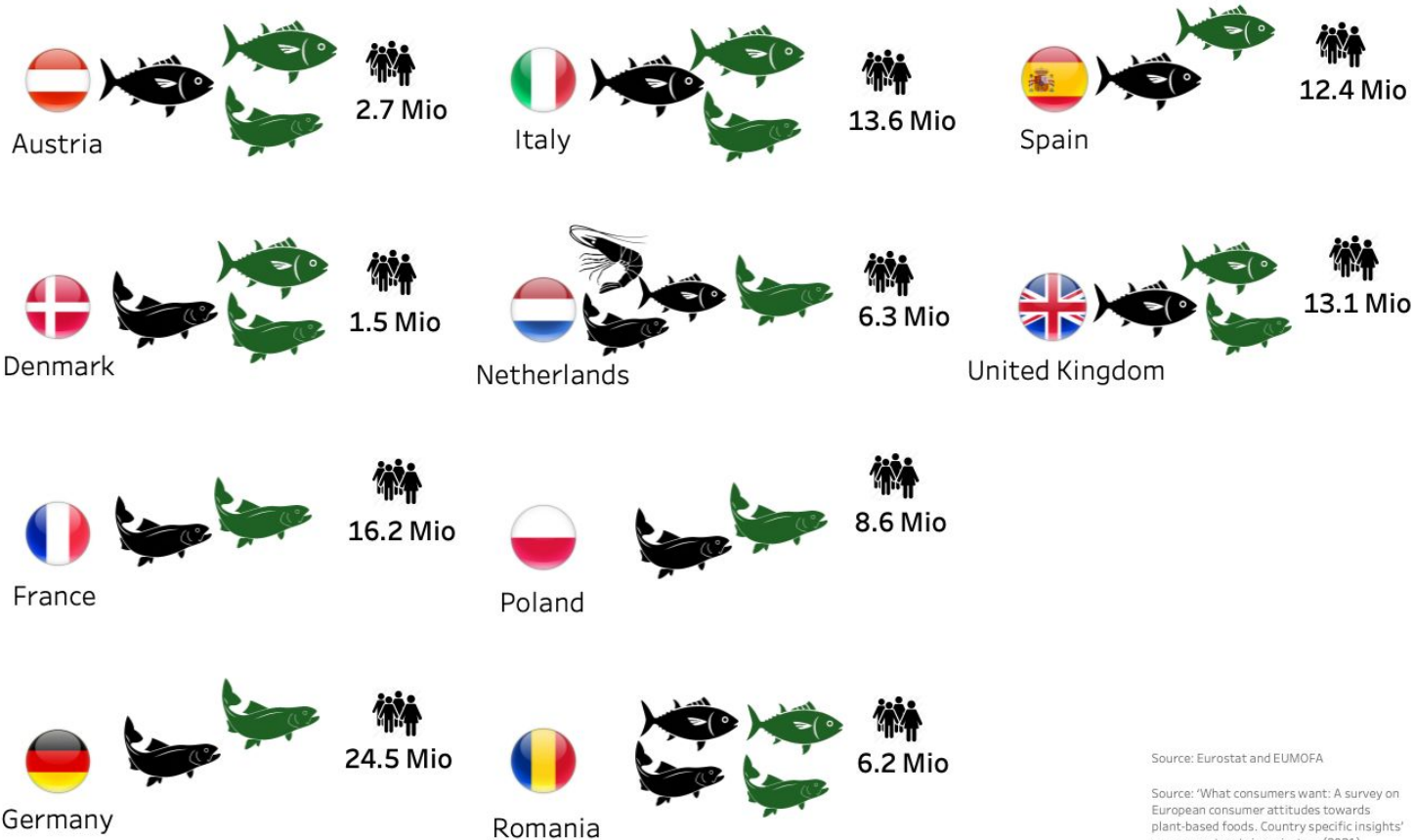
Netherlands:

Big relative target group (53%)

Mid-size absolute market

Summary of results






Most consumed species, most wanted plant-based seafood alternatives, size of target group



Source: Eurostat and EUMOFA

Source: 'What consumers want: A survey on European consumer attitudes towards plant-based foods. Country specific insights' www.smartproteinproject.eu (2021).

Key take aways

- Germany biggest market  
- Netherlands biggest relative target group 
- Plant-based Salmon most wanted alternative over the 10 countries 
- Plant-based Tuna around the Mediterranean  

"Fish are friends, not food!"
- Bruce -

