



Go Veggie...

Natural Flavours for vegan Patties

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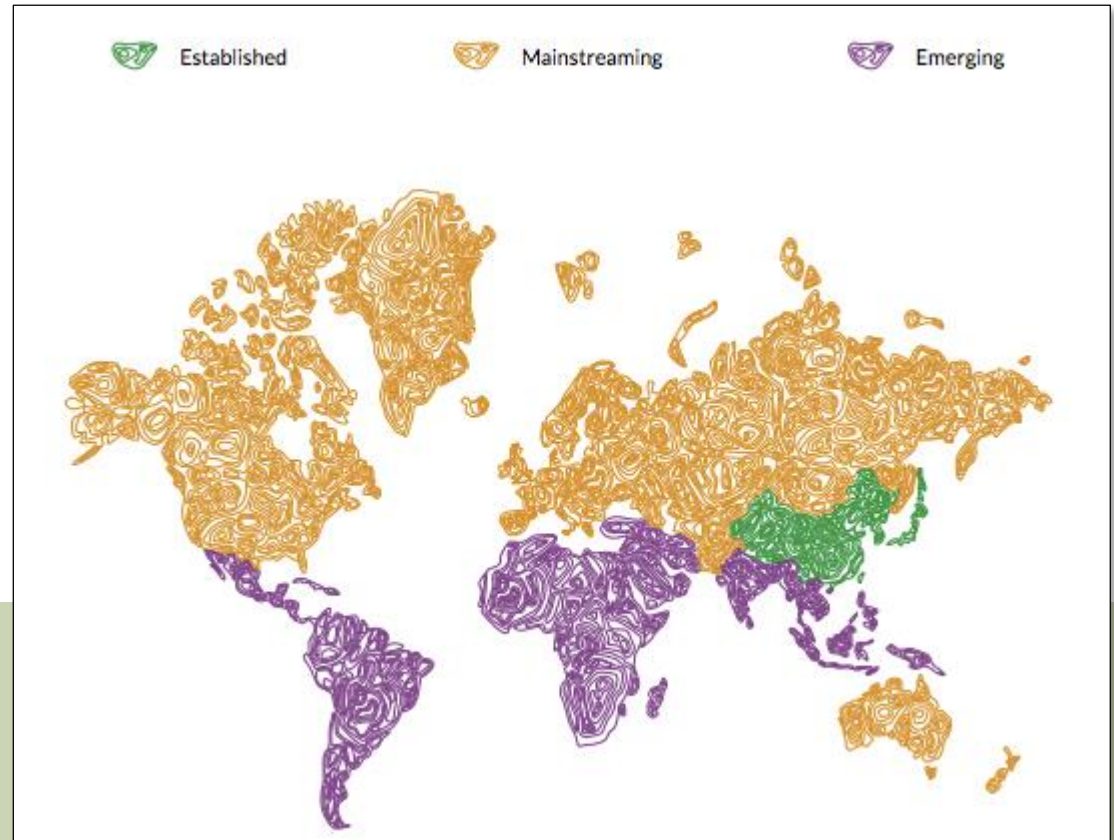
Go Veggie... Natural Flavours for vegan Patties

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A Future Market...

The appeal and potential for vegan and vegetarian food is expanding beyond the small group of people who avoid animal products for ethical reasons to include the much larger base of consumers wanting to cut down on meat now and then.

Responsible for this growth are not only vegans and vegetarians, but also a growing number of consumers who occasionally resort to substitution products.



This graph from Mintel offers a global visual showcasing where animal product alternatives are established, mainstreaming, or emerging.

A Future Market...

The change in culinary preferences is revealing itself through data – **meat alternatives sales are expected to reach \$5 billion by 2020; and more than 1/3 of consumers are open to plant-based products.** Mintel's research found nearly 40% of consumers have had a meatless burger.

There has been a big move towards **flexitarianism** recently which is the main reason for the growing market of vegan and vegetarian products. Even the meat processors, particularly in Germany, are looking for healthy meat-free produce with high levels of protein to address this ever-growing consumer group.



The vegan eating trend has established itself as a longterm growth market with a billion dollar potential.

Megatrend: Vegan

The vegan trend is no short-term hype for many brands - vegan and vegetarian selections are slowly evolving from a niche to a mass market, with rapidly growing consumer acceptance...

With an astonishing speed the retail market has integrated the trendy product assortment into it's product shelves and private label concepts. **Vegan product ranges already show a stronger percentage sales growth compared to the vegetarian range of goods, based on a much higher innovation rate within vegan choices.**



Vegan products have a key strategic importance, due to their strong growth potential and the possibility to gain new consumer groups ...

Megatrend: Vegan



Vegan to go: nutritious in-between energy-boosters based on juice.

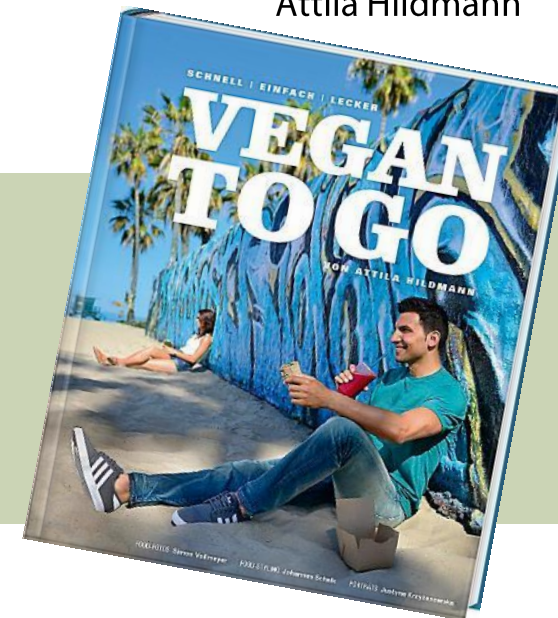


Even the German classic sausage with curry sauce is now available as a vegetarian-friendly option.



Organic pumpkin-seed protein for cooking, baking and shakes.

Vegan shooting-star:
Attila Hildmann



Whether Aldi or Edeka: all huge German retailers have discovered vegans and vegetarians as an important consumer group – offering an increasing number of meatfree products.

Megatrend: Vegan

Other important big players on the meatfree market – next to big brands – are supermarkets and discounters. With an ever-increasing vegan and vegetarian product portfolio they are also entering the market with their own private label products. Vegan in this case is also being progressively used as a way of differentiation.

The future of the vegan market is to be found in the constant extension into other food-segments. The next important step next to full-service-restaurants is mainly the proliferation within the snack and convenience sector as well as a successful integration into the catering segment and the out-of-home market in general.



Market Data // Meat Substitution Products

Market Sizes, Top 15 Countries, Retail Value RSP, € mn

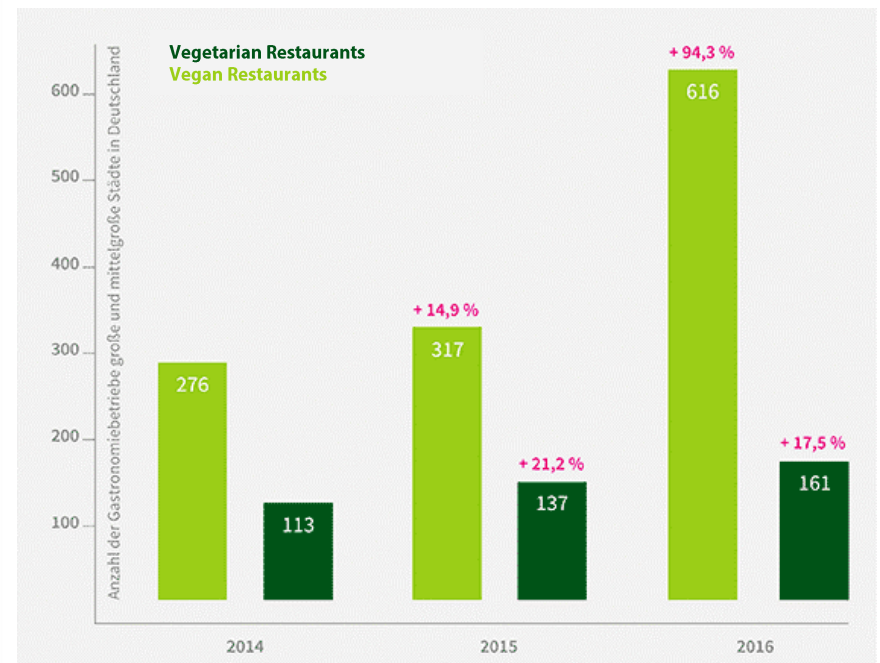
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
World	1.183,0	1.237,4	1.330,4	1.419,3	1.526,4	1.636,6	1.756,4	1.885,5	2.020,4	2.157,0	2.299,3
USA	446,5	464,1	505,9	525,6	549,4	575,2	600,1	631,7	663,7	696,4	729,4
United Kingdom	267,1	262,8	265,7	282,6	294,2	299,1	304,1	311,3	320,3	329,2	337,9
Germany	44,5	54,1	65,5	83,7	98,9	122,2	142,9	164,0	186,1	208,6	232,4
Netherlands	65,2	68,0	70,0	70,1	72,0	75,8	80,5	85,8	91,8	98,4	105,7
Sweden	34,4	35,4	36,5	37,9	42,5	48,7	55,3	62,4	69,2	76,1	83,0
Norway	15,4	16,4	17,7	18,7	20,9	22,6	24,6	26,9	29,1	31,3	33,5
Switzerland	9,6	9,3	10,0	11,5	11,5	11,6	12,0	12,5	13,0	13,5	14,0
Denmark	7,9	7,8	8,1	8,7	10,5	10,9	11,4	11,9	12,4	12,9	13,3
Austria	6,9	9,5	9,7	9,9	10,3	10,7	11,1	11,4	11,7	12,0	12,3
France	8,3	8,3	8,2	8,5	8,8	9,2	9,6	9,9	10,3	10,7	11,1
Italy	5,1	5,4	5,8	6,3	6,6	7,1	7,5	7,9	8,3	8,6	9,0
Spain	1,4	1,8	2,2	2,6	3,3	4,0	4,7	5,4	6,3	7,2	8,1
Finland	2,0	2,1	2,3	2,5	2,6	2,7	2,9	3,1	3,3	3,5	3,8
Poland	0,4	0,4	0,4	0,4	0,4	0,4	0,5	0,5	0,5	0,6	0,6
Turkey	0,1	0,1	0,1	0,1	0,1	0,1	0,1	0,1	0,1	0,1	0,1

Vegan Restaurant-Hype

The vegan trend has arrived in the catering segment, too. In the city of Berlin, the number of vegan restaurants has increased from 12 eateries in 2011 to 43 in May 2016. Throughout Germany a growth of 17,5% from 2015 to 2016 has been detected.

From highest standard kitchens to down-to-earth fast food temples – vegan restaurants nowadays are able to fulfil every culinary wish...

Vegan-vegetarian gastronomy facilities in Germany



Vegan Restaurant-Hype



Food for thought:
vegan foodtrucks
enter major cities,
bringing variety to
the lunch table!



Vegan restaurant “plant”, Capetown



Vegan fastfood chains in Germany and Poland, as well as in the US



Go Veggie // Market Trends USA

Gardein

"Gardein is a sustainable protein brand that delivers the great taste, texture and nutrition of meat with no cholesterol, less fat and calories. These meatless wonders are completely vegan made from non-GMO soy and wheat, ancient grains and veggies. A range of gluten free products are also available."

The company not only presents their vegetarian and vegan products at shows like the EMAs, the New York Fashion Week and other galas but also at veggie festivals like the Toronto or Vancouver Veg Fest and various meatless monday events around America. Gardein products are also a part of the menu at The Veggie Grill – with locations across the US.



Classic Meatless Meatballs and Home Style Meatless Meatloaf

Go Veggie // Market Trends Germany

Bartels-Langness Handelsgesellschaft mbH & Co. KG:
Vegan Leben

Vegan Meatballs with aromatic Spice Mix

Base: soy- and wheat protein; good to be combined with potatoes, pasta, salad and vegetables

Vegan Vegetable-Balls

Base: wheat protein and vegetables; can be served with many different dishes, e. g. rice and pasta dishes, salads or vegetables



**ALSO GOOD TO
BARBECUE!**

Rügenwalder Mühle

Vegetarian Meatballs and Mini-Meatballs with Paprika

Base: wheat protein, rapeseed oil and eggwhite protein from free-range eggs; perfect for a quick warm meal or a cold snack in-between.

No.1
Veggie-Brand
in Germany

Go Veggie // Market Trends Germany

Garden Gourmet

Vegetarian Meatballs

Base: soy and wheat protein, breadcrumbs and eggwhite protein

Vegan Mini Meatballs

Base: soy and wheat protein; suitable for various meals and dishes



Heirler

Meatballs and Mini Meatballs (vegetarian)

Base: soy and wheat protein; perfect taste and texture; for versatile vegetarian applications

Go Veggie // Market Trends Germany/Netherlands

Good Bite

Vegetarian Meatballs / vegetarian Meatballs in Gravy

Base: soy and wheat protein; the typical German meatballs are getting more and more popular in The Netherlands, too; fits into the daily meal plan and can be eaten as a snack on a bun, as well

Vegetarian Mini Meatballs

Base: soy and wheat protein; contains vitamin and mineral supplements; easy and healthy daily snack for in-between or as fingerfood party snacks served with dips



Enjoy GoodBite products with a clear conscience:

tasty for now, good for later.

Go Veggie...

Get in touch with taste and discover Bell's natural flavour creations for meatfree patties – aromatic, delicious and 100% vegan!

Flavour Creations for vegan Patties

- ✓ **Broad range of vegetarian/vegan applications:** soy- , pea- and wheat-protein based meat substitutes, vegetable- and cheese-based , dairy-based, tofu-based meat substitutes, convenience products – for grilling, roasting or deep frying
- ✓ Round off vegan products, **give them a special depth of flavour and create a distinctive, authentic and recognizable culinary profile**
- ✓ All flavours are halal-conform, **natural and 100% vegan**
- ✓ **Easy-to-use solutions** to impart tasty characteristics into vegan products

Application Recipe – vegan Patties

Ingredients:

Water	49,00 kg
TruTex 1501* (Wheat Protein)	30,00 kg
LoryBind 4137-18*	10,00 kg
Vegetable Oil	10,00 kg
Salt	1,00 kg

Bell Flavour(s)	x kg
------------------------	-------------

Total	100,00 kg
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The wheat protein-based application ensures market-conformity, reduced off-notes and a meat-like texture.

Manufacturing Recommendation:

1. Weigh all ingredients.
2. Allow TruTex 1501 to swell in water for 30 minutes and shred afterwards.
3. Add vegetable oil and mix until the mass is well combined.
4. Add LoryBind 4137-18 and Bell's flavours as recommended. Create a homogeneous mass.
5. Form as required and place on a baking sheet.
6. Bake at 120°C (humidity: 50%) for 8 minutes.
7. Bake again at 130°C (humidity: 30%) for 8 minutes.
8. Let vegan patties cool down in fridge for at least 6 hrs.
9. Product is now ready to be pan-fried.

* Loryma

1. VEGETABLES



4300188 Vegetable Flavour Powder

Declaration: natural Flavouring, halal-conform

Dosage: 3%

A perfect delight for veggie-lovers: the combination of fresh broccoli, carrots and a hint of onion and celery creates a hearty flavour profile...

+++ vegetable content: 17% +++ palm oil free +++



2. PROVENÇAL HERBS



4300189 Herbs Flavour Powder

Declaration: natural Flavouring*, halal-conform

Dosage: 3%

The aromatic and mild mix of fresh mediterranean herbs is a real classic for vegetarian and vegan substitution products.

+++ visible herbs +++ palm oil & allergen free +++



* Can be declared as „Herb and Spice Extract“

3. PIZZA

4300227 Pizza Flavour Powder

Declaration: natural Flavouring, halal-conform

Dosage: 3%

Pizza is one of the most popular taste directions for young and old consumers – it delivers a fine taste of tomatoes, cheese and oregano...

+++ visible herbs +++ allergen free +++ less salt +++



4. GOUDA CHEESE

4300187

Type Gouda Cheese Flavour Pwd.

Declaration: natural Flavouring, halal-conform

Dosage: 2,5%

This strong, creamy and intense gouda cheese note creates an aromatic and characteristic taste profile.

+++ allergen free +++ less salt +++



5. MUSHROOM

4300226 Mushroom Flavour Powder

Declaration: natural Flavouring, halal-conform

Dosage: 3%

Earthy notes of brown and white mushrooms combine to create a distinctive and aromatic taste profile – simply delicious!

+++ palm oil & allergen free +++ less salt +++



6. SMOKY BACON



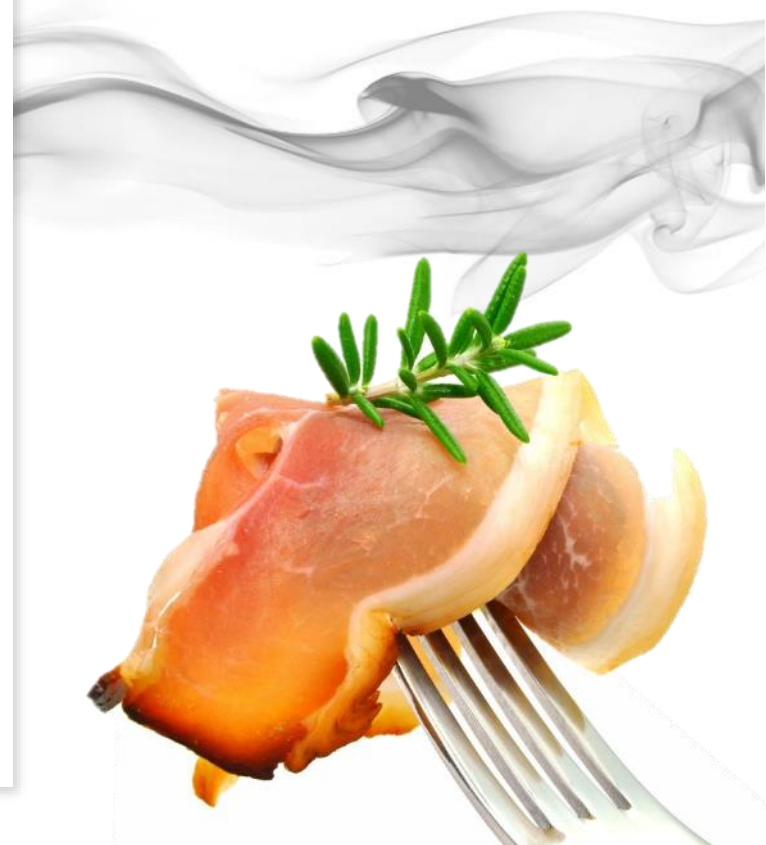
4300190 **Smoke Flavour Powder, Bacon Type**

Declaration: natural Flavouring, halal-conform

Dosage: 3%

This spicy-aromatic combination of bacon and smoke is a real classic for meat lovers, but also highly rated among flexitarians...

+++ palm oil & allergen free +++ natural smoke taste +++



7. CHILI SIN CARNE

4300186 **Chili Sin Carne Flavour Powder**

Declaration: natural Flavouring, halal-conform

Dosage: 3%

No meat but as delicious as the original – our chili sin carne flavour delivers the aromatic notes of paprika, tomato, onion and a hint of cumin!

+++ allergen free +++ less salt +++



8. STEAK & PEPPER

4300228 **Pepper/Steak Flavour Powder**

Declaration: natural Flavouring, halal-conform

Dosage: 3%

The intense and aromatic taste of pepper and grilled steak is literally mouth-watering – not only for flexitarians (but also for vegans)...

+++ palm oil & allergen free +++



Still hungry for more?

Discover more of our delicious flavour innovations for vegetarian and vegan meat substitutes, i. e.:

- **vegetarian Cold Cuts**
- **vegan Mini Schnitzel/Nuggets**
- **vegetarian Sausage Salad**



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THE TRENDS OF **TOMORROW**

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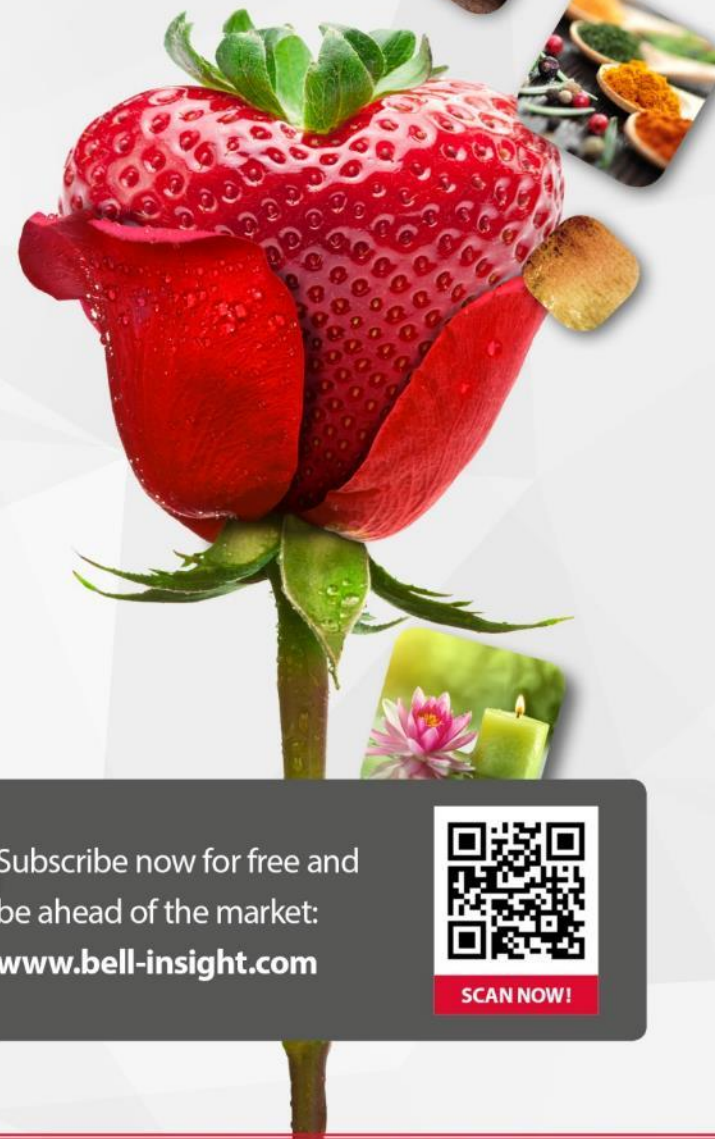
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