

Protein Alternatives in Switzerland: Consumer Drivers, Market Evolution, and Future Trends

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Who we are and what we stand for



Largest Retailer in Switzerland



Deep **food production expertise** with various **industrial companies**



Primary goal is to **improve the quality of life of our customers**



Why protein alternatives matter in Switzerland

Protein alternatives are no longer just a niche topic; they are part of broader shifts in Swiss eating habits.

- Consumers in Switzerland are rethinking the role of animal products in everyday diets
- Protein alternatives are increasingly relevant across meals and categories
- The category should be viewed through both **consumer behavior** and **market structure**

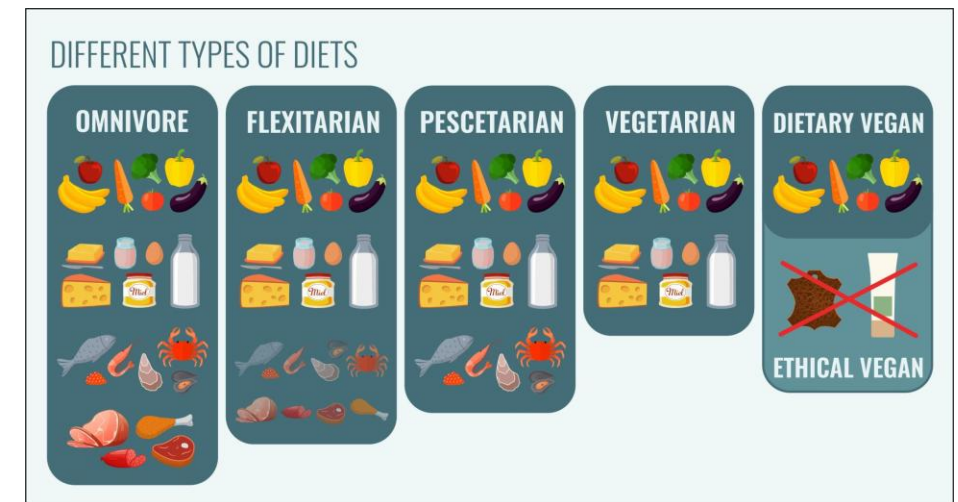




The market starts with dietary behavior

To understand protein alternatives, we first need to understand dietary patterns.

- Consumer demand is closely linked to changing eating habits
- The most relevant lens is not only veganism, but a broader spectrum of dietary choices
- Reduction and replacement of animal products happen in different ways across consumer groups





The market starts with dietary behavior

Dietary behavior

Flexitarians

Flexitarians are part-time vegetarians who consciously and regularly avoid animal products. However, they still eat meat, fish, milk, cheese, and other foods of animal origin.

Main reasons for this diet

1. For the sake of the **environment**
2. For the sake of **health**
3. To protect animals

Substitarians

Substitarians consume vegan substitute products several times per month that imitate the animal-based original, thereby reducing animal proteins in their diet. However, they still partly eat meat, fish, milk, and/or cheese and often combine these ingredients with vegan substitutes in the same meal.

1. For the sake of the **environment**
2. For the sake of **health**
3. To protect animals

Vegetarians

Vegetarians strictly do not eat meat or fish. Some also avoid eggs and/or dairy products and cheese.

1. To **protect animals**
2. For the sake of the environment
3. For ethical reasons

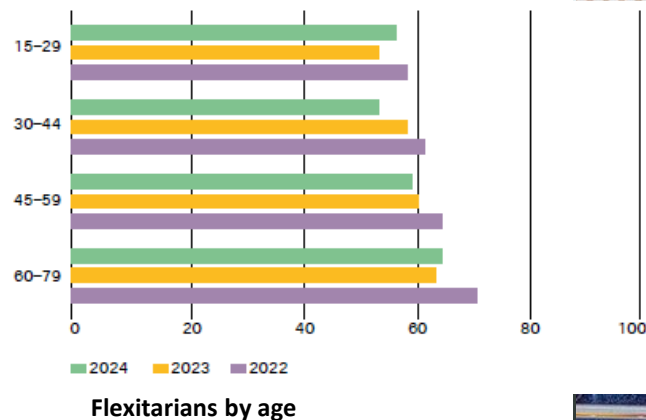
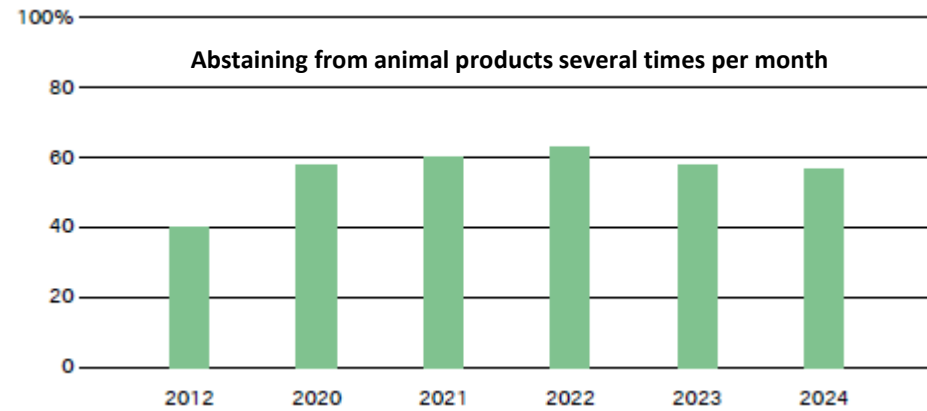
Vegans

Vegans do not eat any foods of animal origin at all, meaning no meat, fish, milk, eggs, or honey.

1. For **ethical** reasons
 2. To protect animals
 3. For the sake of the environment
-

Switzerland: A country of flexitarians

- **More than half are flexitarians:** Today, 57% of the Swiss population consciously abstain from meat, fish, milk, cheese, and eggs several times per month and are therefore considered flexitarians.
- **People over 60 in particular follow a flexitarian diet**





Replacement is part of meal adaptation

Consumers do not all replace meat or fish in the same way.

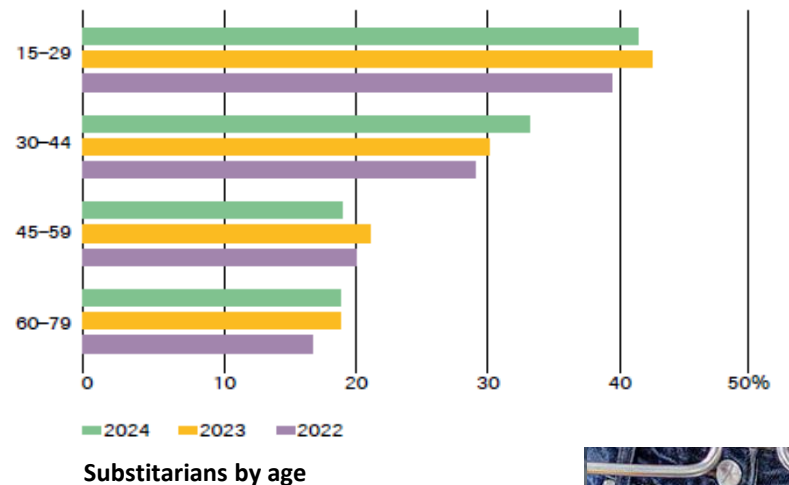
When replacing meat or fish, consumers may choose:

- cheese or other dairy products
- mushrooms or vegetables
- legumes (e.g. lentils, peas, beans)
- egg
- more of the other components of the meal
- tofu or tempeh
- meat or fish alternative products
- seitan
- other options

This means protein alternatives compete not only with meat, but also with a broad set of meal solutions.

Switzerland: Young Consumers Drive Demand for Vegan Alternatives

- Nearly **one third** of Swiss Consumers enjoy vegan substitute products several times a month and are considered so-called “**substitarians.**”
- The **younger** the respondents, the higher the share of substitarians.



Category structure: dairy alternatives lead the Swiss market

- Dairy alternatives represent the largest share of the replacement-products market
- Meat alternatives are the second-largest category

Sales of substitute products in the meat, milk, yogurt, cheese, and fish categories in the Swiss market, in CHF millions



Category structure: the range of meat substitute products on the Swiss market is very diverse.

- Currently, **vegan schnitzels** are in the highest demand, generating sales of CHF 17 million, followed by vegan **alternatives to sliced meat strips**.
- **Vegan charcuterie** substitutes now rank third, ahead of **sausage** alternatives.
- The category of **steak/fillet** is growing.
- The other categories (including burger substitutes) are declining.



Sales in CHF millions in the Swiss meat substitute market

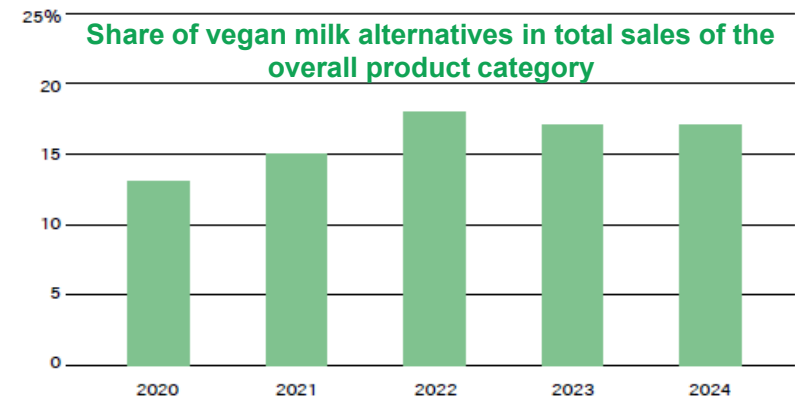
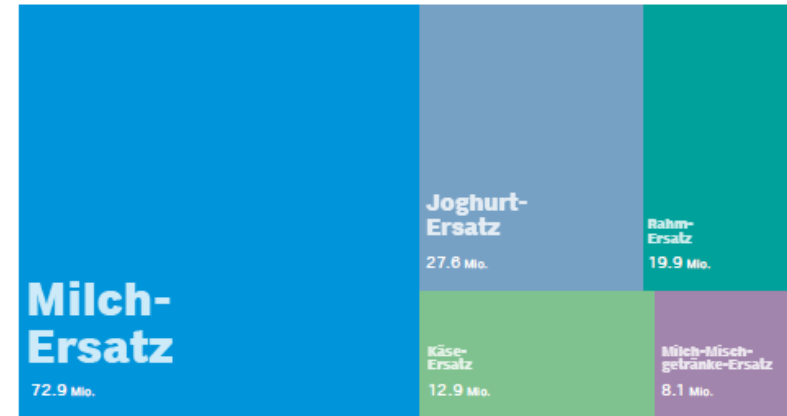


Category structure: dairy alternatives lead the market

- **Milk and yogurt alternatives** are the largest categories and continue to grow.
- **Oat-based milk alternatives** are the most popular among Swiss consumers (60%), followed by soy (20%), nut-based alternatives (15%), and rice-based alternatives (5%).
- The **share of vegan milk alternatives** in total sales of the overall product category is the highest among protein alternatives.



Sales in CHF millions in the Swiss dairy substitute market



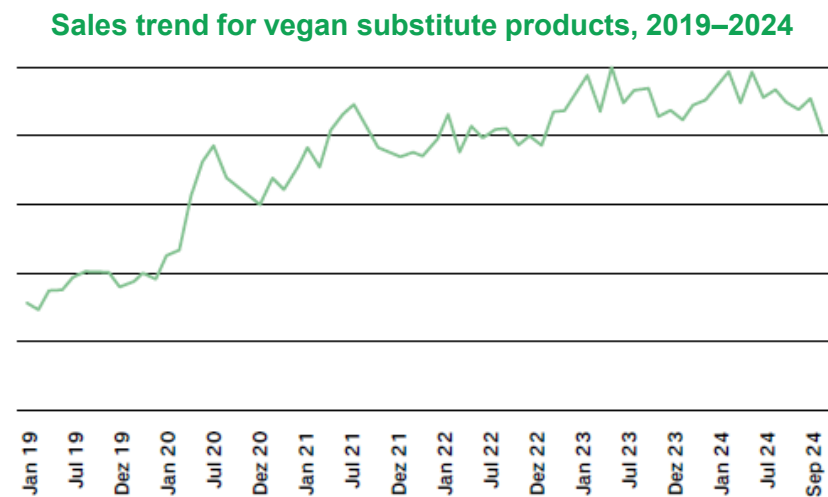
Market evolution should be read over several years



Protein alternatives are best understood as a multi-year category shift.



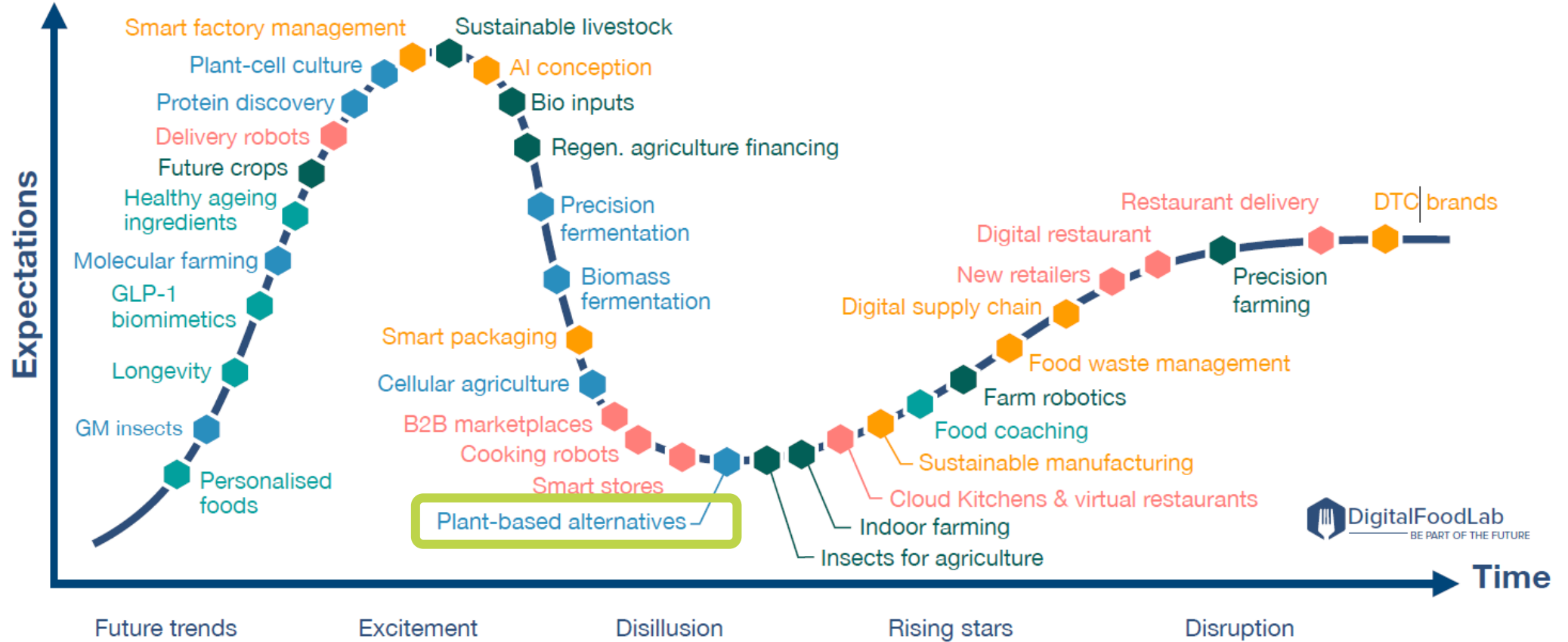
The market should be assessed as an evolving category, not as a short-lived trend



Paradigm Shift: the job ticket changed from, «**explore & innovate**» to «**rationalize, scale & break even**».

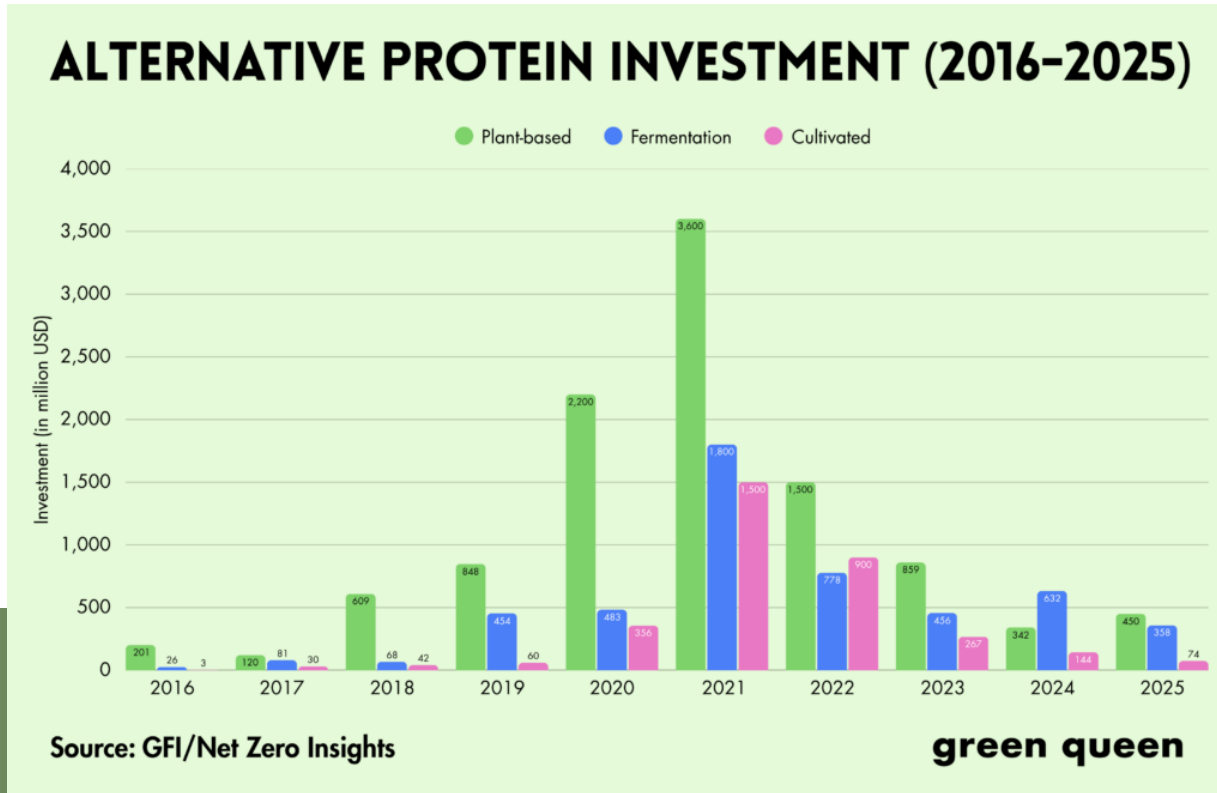


2026 DigitalFoodLab Trends Curve



Mega trends	Sustainable ingredients	Healthy ageing	Smart & efficient food industry
	Resilient farm	Food Automation	

Global Alternative Protein Consolidation

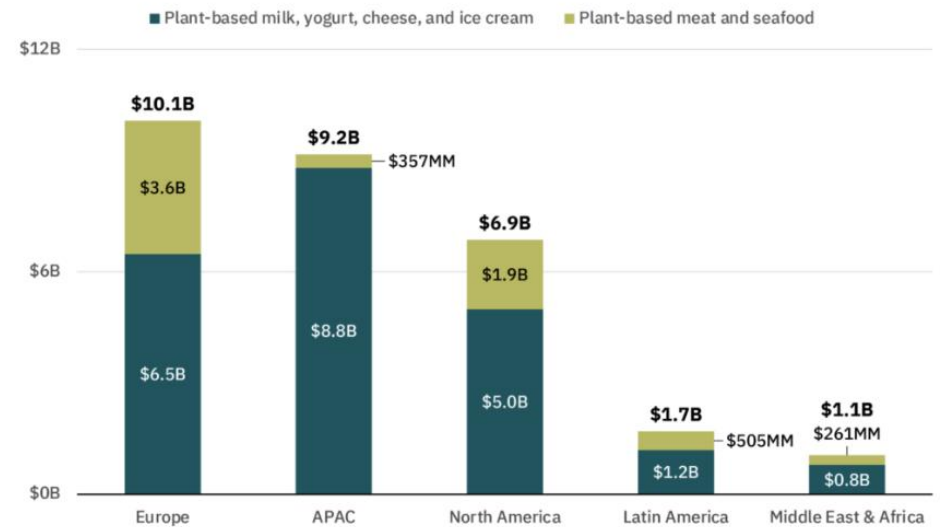


- Analysis by Green Queen has found that, **since September 2024, more than 70 alternative protein businesses** have merged, been acquired or bought out, fallen into insolvency, or ceased operations.
- GFI's 2026 State of the Industry reports state that last year, **19 plant-based companies were acquired**, and several others paused or ceased operations after struggling to secure follow-on financing.

What will shape the next phase of the market

- In 2025 Global plant-based sales increased, with Europe taking the lead
- Retail sales for plant-based meat, seafood, and dairy reached \$28.9B worldwide in 2025, according to analysis by Euromonitor – that’s a **3% increase** from the year before (including inflation).
- Non-dairy products continued to lead this market, and milk alternatives topped the charts in sales.

Figure 2. Global plant-based foods retail sales estimates by region (\$ USD) 2025



Source Euromonitor International Limited [2025] © All rights reserved.
Staple foods – Meat and Seafood substitutes; Snacks – Plant-based ice cream; Dairy Products and Alternatives. Retail Value RSP, Current Prices (includes inflation).
*APAC includes both the APAC and Australasia regions as defined by Euromonitor.

Courtesy: GFI

What will shape the next phase of the market

Future growth will depend on mainstream relevance.
The next phase of development will likely depend on:

- winning **flexitarian and occasional users**
- fitting into **everyday eating habits**
- strong performance in **high-frequency categories** such as dairy alternatives
- the ability of alternatives to compete with conventional products in **quality and cost**
- Rise of **hybrid products**



Strategic implications for industry

Winning in protein alternatives requires more than launching more SKUs.

- Focus on **consumer occasions and meal substitution**
- Prioritize categories with **broad, repeated use**
- Understand that alternatives compete with both:
 - **animal products** such as eggs and cheese
 - **non-processed meal replacements** such as legumes and vegetables





Key takeaways

- Protein alternatives are becoming part of broader **dietary change** in Switzerland
- Demand is driven by **flexitarian/substitarian** consumers
- The market has developed unevenly across categories
- **Dairy alternatives** currently lead, while **meat alternatives** remain central
- Future growth depends on relevance for **everyday eating**, not niche positioning

THANK YOU!



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