







# Reinvent Your Plate

Navigating the Next Wave of Plant-Based Innovation

Givaudan  
Human by nature

# Speakers



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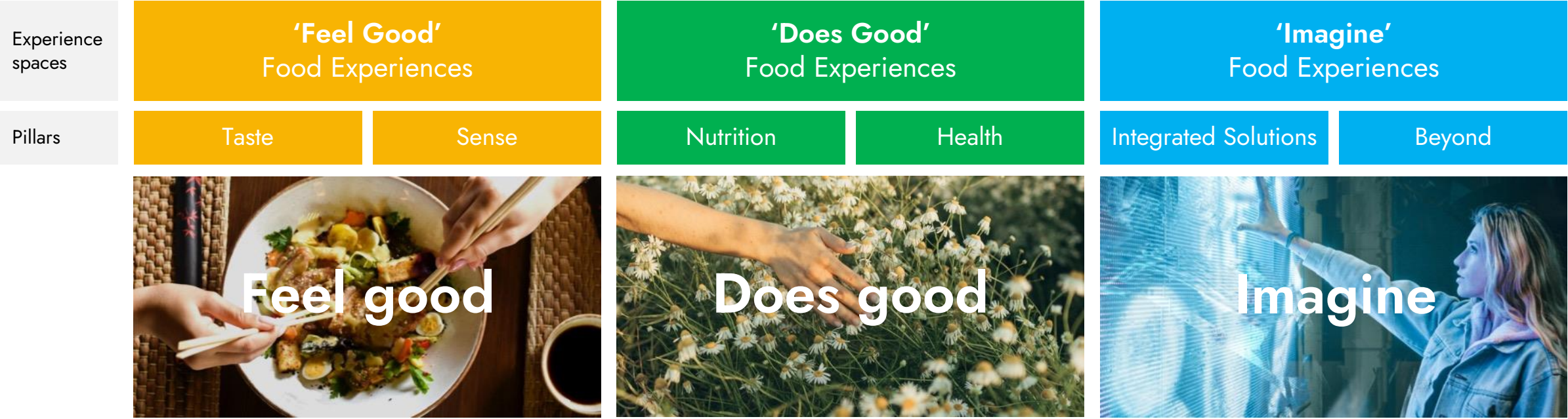
A close-up photograph of a chef's hands. The left hand, wearing a gold ring, holds a black spoon and stirs a dark substance in a pot. The right hand is also visible, holding the pot. A large plume of white steam rises from the pot, partially obscuring the background. The chef is wearing a dark blue shirt.

About Taste & Wellbeing

**We go beyond great taste to create food experiences that do good and feel good, for body, mind and planet.**

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# An expanded portfolio that enables us to deliver future facing food experiences that consumers value





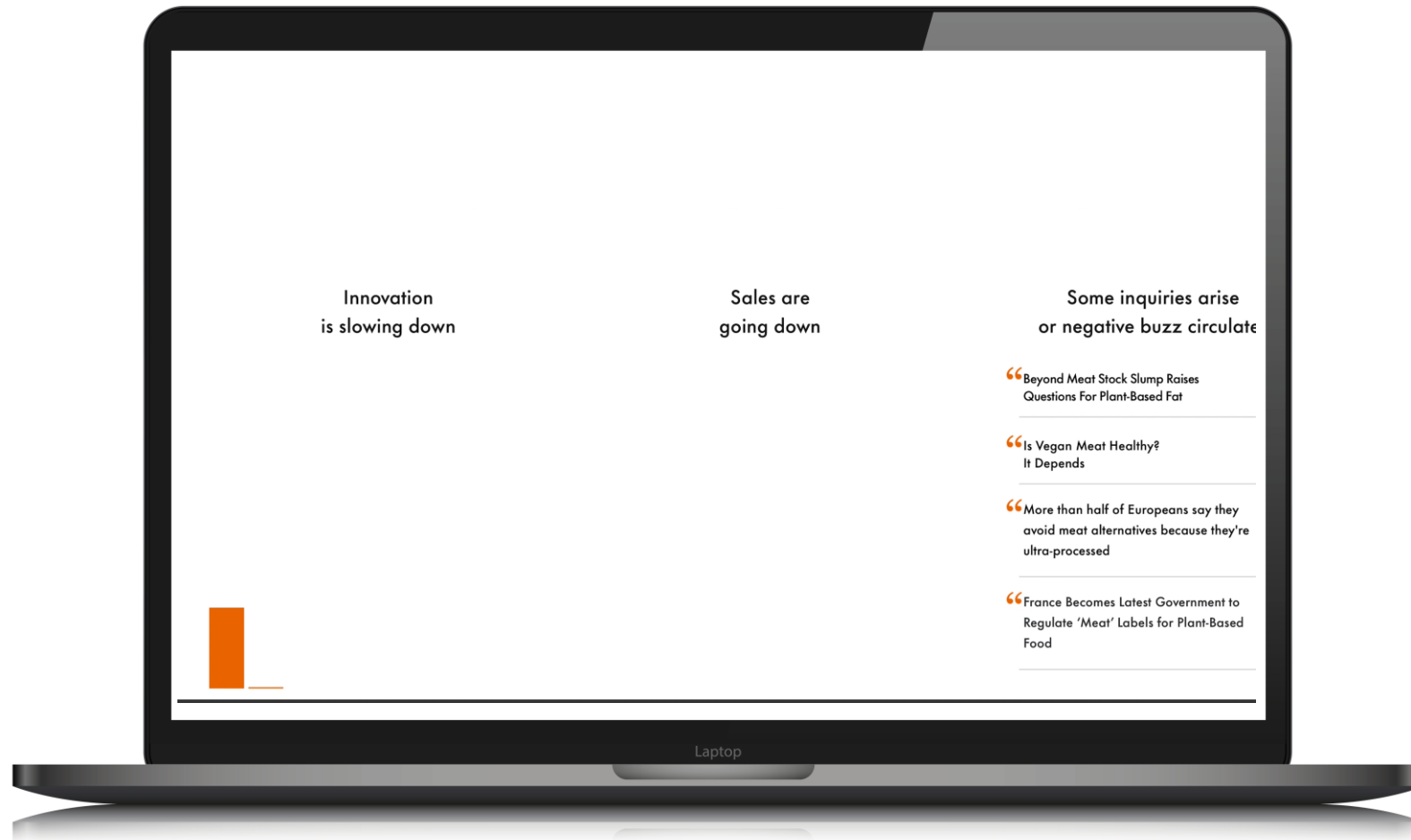


# What is Reinvent Your Plate?

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# Why are we talking about meat alternatives?

## The market in Europe is challenged



# Reinvent Your Plate

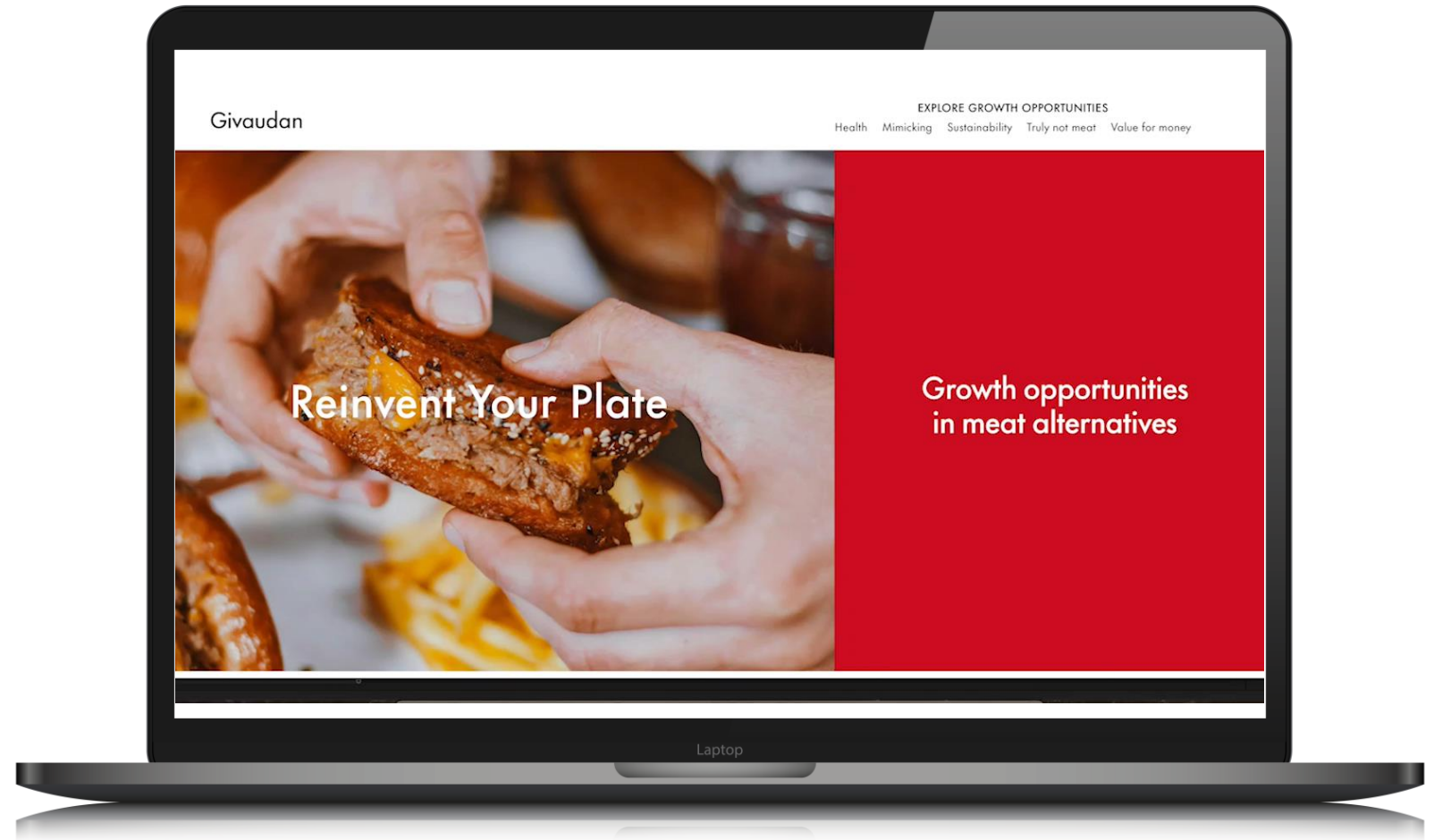
Everything you need to know about meat alternatives

## An unique and holistic view

- Latest consumer insights
- Customers' perspective
- Givaudan expertise

Understand what's happening  
**today** and get ready for **the future**

Everything in one simple  
interactive digital platform



Givaudan



# A holistic and in-depth viewpoint of the category

Consumer and industry views, both qualitative and quantitative

**3085** consumers

The vegan, the vegetarian, the flexitarian, and all the other ones who do not follow any restrictive diet.

**250** industry experts

Marketing, brand, and technical experts.

**150** hours

of qualitative interviews.

**15** new concepts

to stimulate the discussions.

**25** quantified

questions.

Across Europe, and with a focus on the United Kingdom, the Netherlands, Germany, Poland, France

&

Givaudan's solutions  
and expertise

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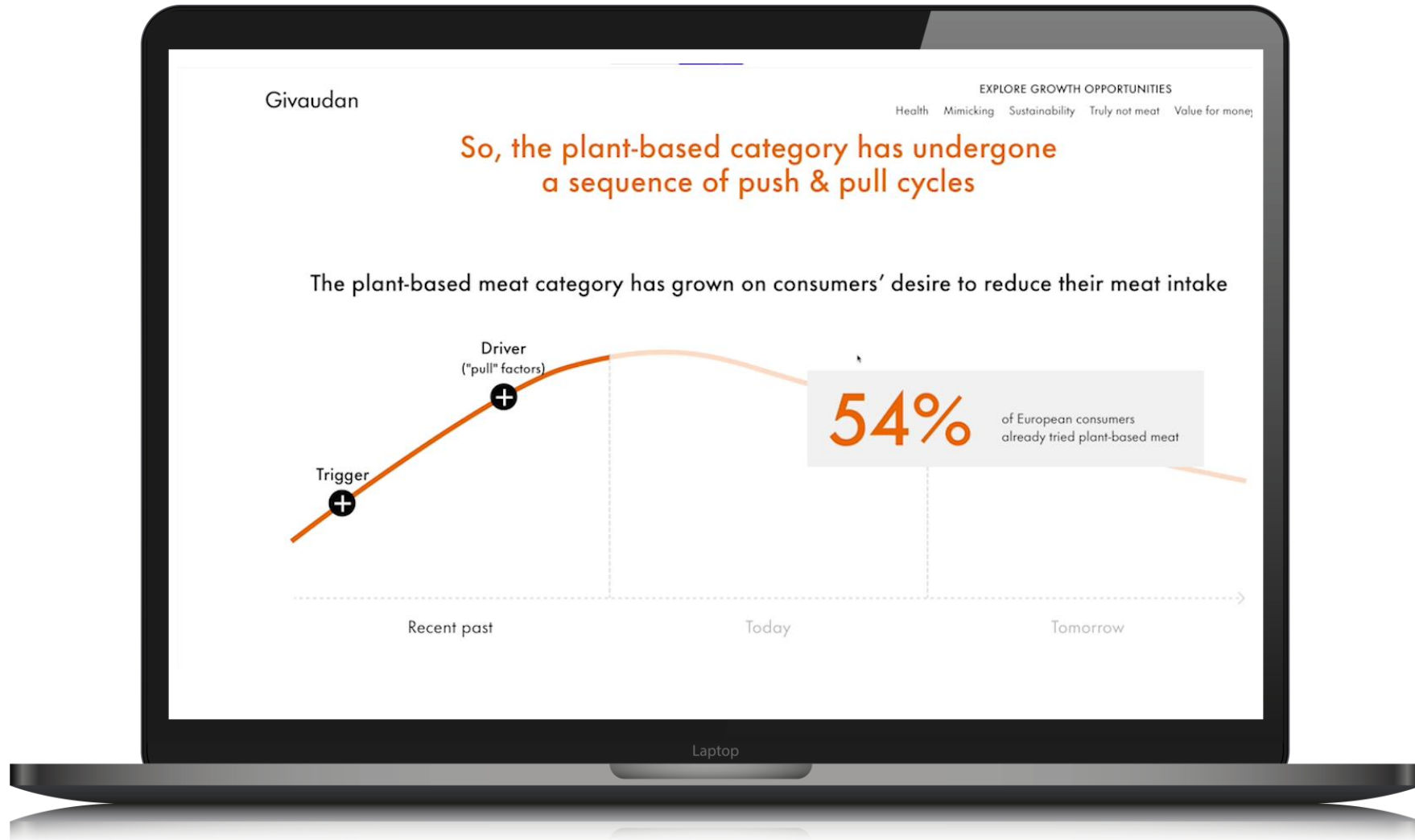
# Consumers expect more when it comes to meat alternatives

Consumer Insights



# Consumers have evolved

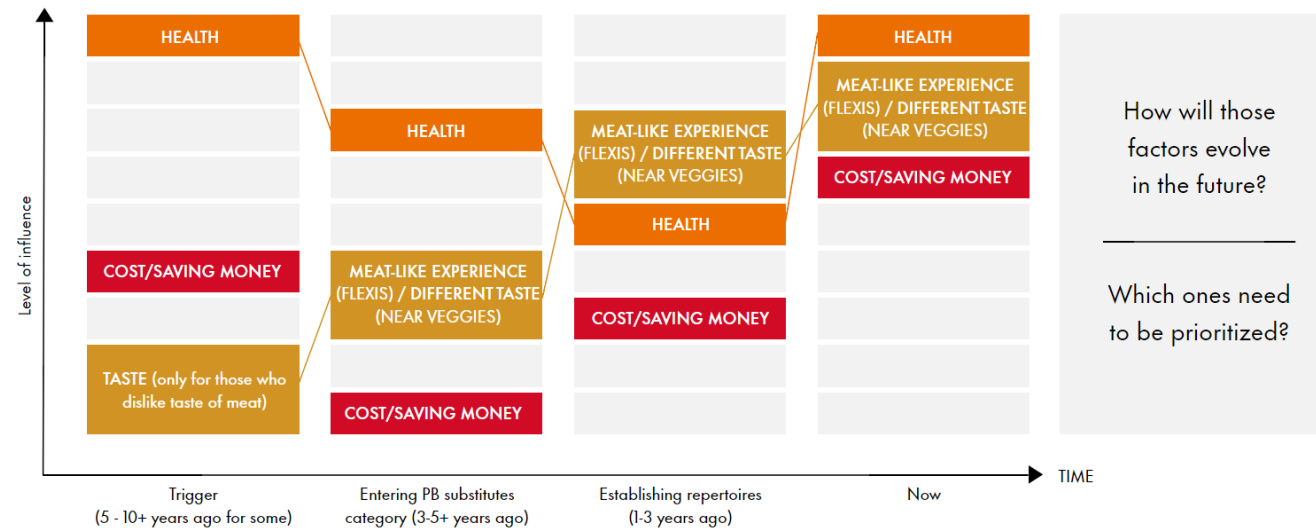
The enthusiasm for the category remains strong, yet the honeymoon phase is over



# Consumers want everything

## Health returns to the top

Over time, focus on taste and value for money increases, health returns to the top

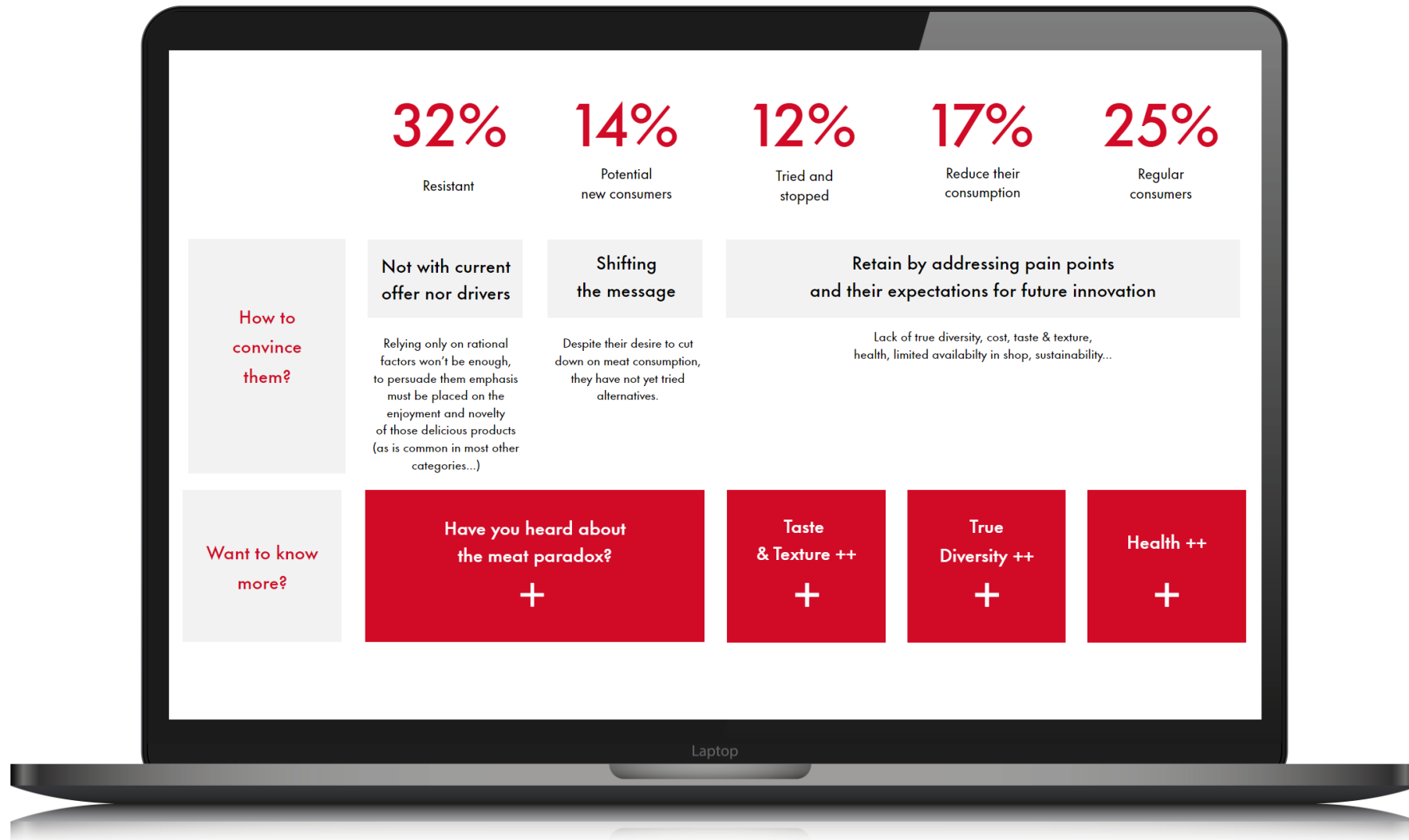


Laptop

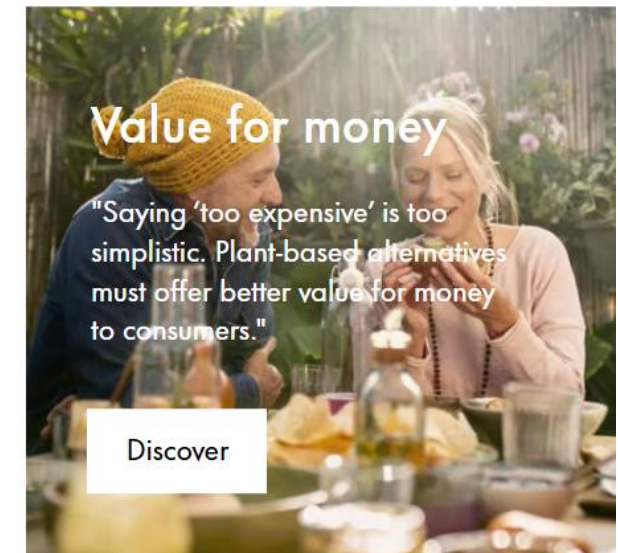
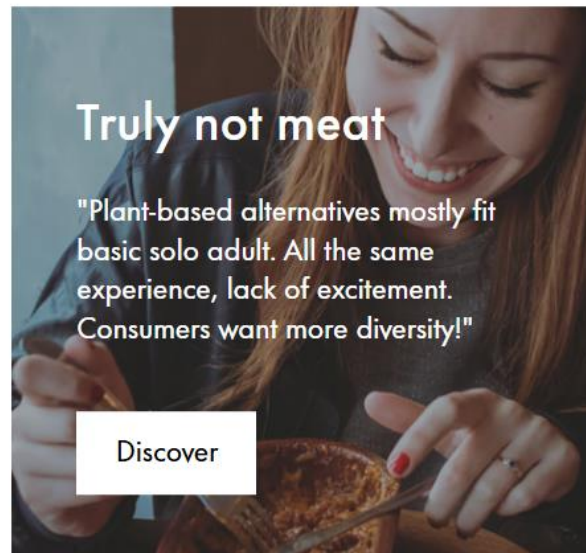
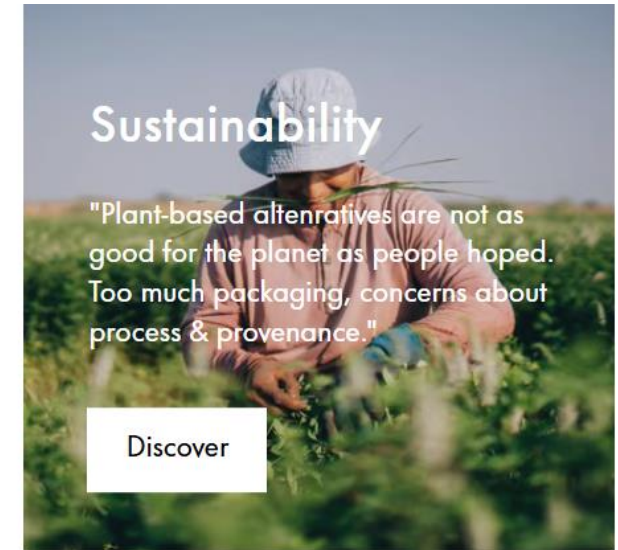
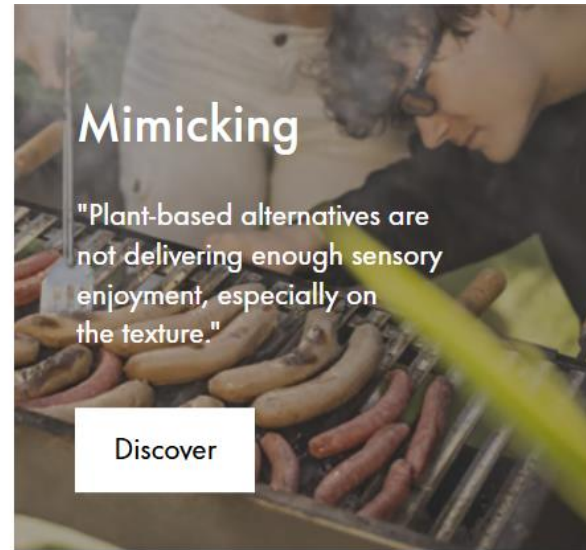
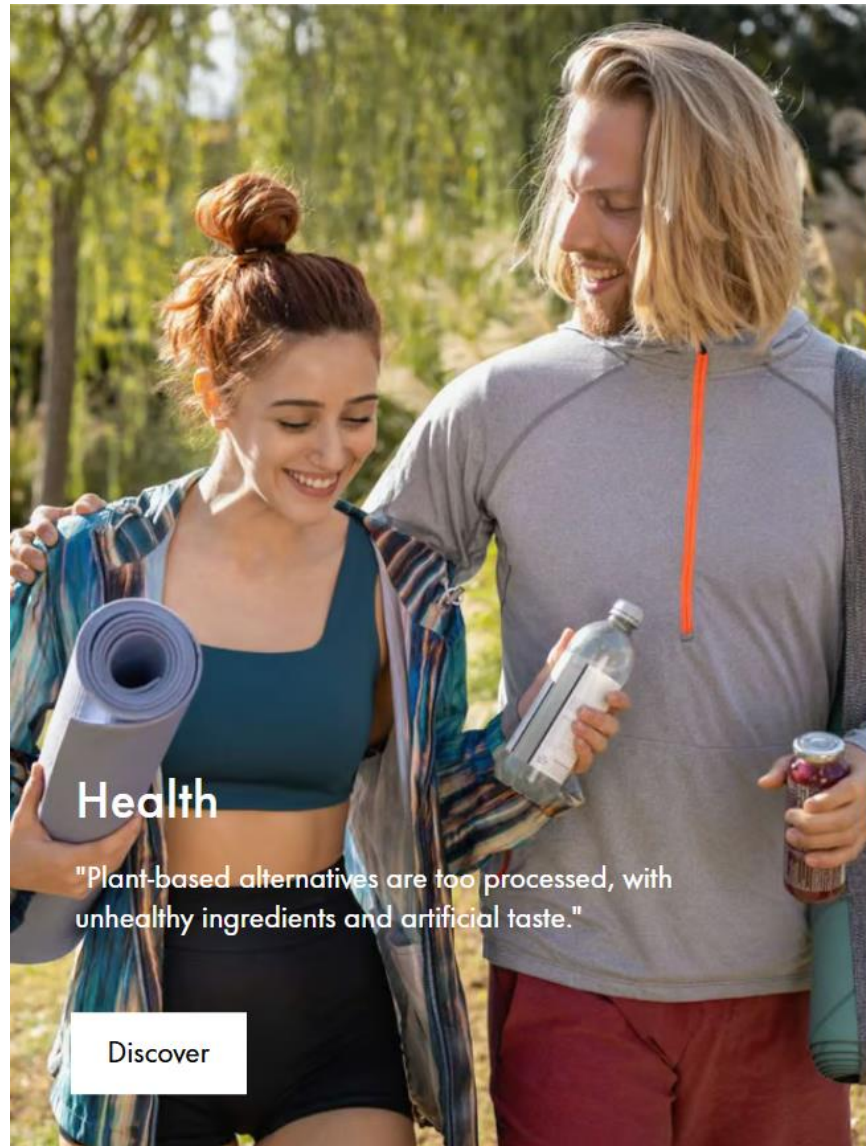
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# Depending on their journey, consumers have different priorities



# Let's delve into the opportunities for future growth





# Exploring future innovation territories

## We used various concepts to explore unmet consumer needs

One on the most appealing!

A

Really the same as meat

Really the same as meat

Products that authentically replicate the entire meat experience:

- Same meat-eating experience: taste, texture, visual (same colour, same format e.g. whole piece, joint), aroma.
- Same cooking experience: change of colour when it is cooked, multi-usage.
- Same nutritional profile: proteins, aminoacids and other essential elements for comparable health benefit.
- Same eating occasion: replace meat on any occasion in home and out-of-home.

A

B

Healthier plant-based options

Healthier plant-based options

Introducing the next generation of plant-based meat, offering a delectable and healthier alternative thanks to either:

- Optimized Nutritional Profile: Elevate your nutrition with a high protein content and low levels of fat and salt, enhanced with vitamins and minerals for a balanced and wholesome choice.
- Made with simple, trusted ingredients: a short and clear ingredients list allergen-free, featuring only a limited number of well-known components, so you can be certain of what you are eating.
- Good Nutri-Score / Traffic light: clear indicator guiding you towards healthier options.
- Guaranteed with minimal processing.

B

C

Green-minded

Green-minded

With this plant-based meat product, you do something more positive for the environment. These new plant-based products could be composed of:

- Local/European grown plants for trusted provenance.
- Protein sources from sustainable agriculture: regenerative agriculture (reducing the use of water and other inputs, and preventing land degradation and deforestation) or vertical farming for example.
- A wider range of protein sources (chickpea, fava bean, barley...) to increase biodiversity on your plate and for the planet.
- New sustainable sources: algae, mycoprotein, protein from side stream industry (unused yeast from brewery process).

C

D

Truly not meat

Truly not meat

Indulge in a delightful, nutritious and sustainable meat alternative that offers a unique culinary experience distinct from traditional meat.

- Imagine an assortment of marinated products, drawing inspiration from Korean, Japanese, and Chinese cuisines for example, to introduce exciting new flavours & textures to your dining experience.
- Based on traditional natural protein sources that have a subtle and neutral natural taste such as seitan (made from wheat), tempeh (made from lightly fermented soy beans), tofu (made from condensed soy milk).
- These products give you versatile options to cook with pasta, rice or vegetables or serve alongside, providing a balanced nutritious meal.

D

E

Best of both worlds

Best of two worlds

Half Meat & Half Vegetable

- An innovative blend - 50% meat combined with 50% vegetables - for delicious, healthier, and more sustainable products.

Half Plant-based meat & Half Vegetable

- An innovative blend - 50% plant-based meat combined with 50% vegetables - for delicious, healthier, and more sustainable products.

E

F

Future Plate

Future Plate

Welcome to Future Plate: Elevating Taste, Ethics, and Sustainability.

- Cultivated meat, also known as cultured meat, is genuine animal meat that is produced by cultivating animal cells directly. It offers the familiar meat tastes, with the same culinary possibilities.
- Indulge guilt-free and contribute to both planetary well-being and animal protection.

F

G

Targeted health benefits

Targeted health benefits

Experience improved well-being with these innovative plant-based products, carefully crafted to optimise your health. For instance:

- Improve your gut health with this easily digestible option, now featuring added fibre, pre/probiotics for a bloast-free experience.
- Combat heart disease by harnessing anti-inflammatory and antioxidant properties.
- Combat fatigue effectively with a heightened B3 vitamin content that promotes energy and vitality.
- Nurture cognitive health with the inclusion of carbohydrates, supporting optimal brain function for enhanced mental well-being.

G

H

Grow your own

Grow your own

Indulge in your favourite plant-based meat crafted right at home, ensuring fully sustainable and transparent production. For instance:

- Grow your own mycoprotein (mushrooms) at home, adding a fun and hands-on element to creating your delicious meat alternatives.
- Embrace the future with a 3D printer: allowing you to design and customise your plant-based creations according to your specific preferences.
- Ferment your own protein from pumpkin, lentils or other vegetal sources.

H

I

Wonderful veggies

Wonderful veggies

Make real vegetables the star of your plant-based meals!

- Place vegetables at the heart of your plate for both healthy and delicious dishes.
- Explore a wide array of ready-to-eat hot and cold vegetable options, for example cauliflower, zucchini and smoked carrots, to elevate your culinary experience.
- There is no need to mimic meat: glorify your veggies for complete healthy nutrition.

I

J

Plant-based On the go

Plant-based for on-the-go lifestyles

Explore plant-based snacks and quick meal options that offer a wholesome and nourishing choice to satisfy your hunger swiftly.

- Uncover a novel, tactile, and sensory eating experience anywhere, any time.
- Whether enjoyed solo or shared, these snacks and quick meals offer a convenient and delightful way to fuel your body with healthful goodness.
- Plenty of satisfying choices: plant-based snacks (beef jerky style), plant-based meat chips, new "finger food" e.g. crispy fried jackfruit, carrot bacon, instant / quick complete meal.

J

K

Diversified Ready-Meals

Diversified ready-meal options

Broader selection of ready-to-eat plant-based dishes, that enable you to:

- Serve plant-based premium meals for special occasions (like family events or celebrations).
- Rediscover well-known traditional or regional recipes now plant-based!
- Embark on a culinary journey, exploring the diverse flavours of Asian, South American, and Middle Eastern cuisines.
- Choose from a variety of sizes - single, duo, or family formats - available in both the fresh and frozen aisles.

K

L

Easy way to cook

Easy way to cook

Delicious ready to use plant-based sauces and marinades to create tasty plant-based dishes in a matter of minutes.

- Simply add one of these plant-based sauces containing plant-based meat to rice, pasta or vegetables to create wholesome comforting dishes like plant-based bolognese, chilli or carbonara.
- Or simply use the cooking sauces or marinades (free from dairy, cheese and eggs): they are tailor-made for plant-based substitutes.

L

M

BBQ Experience

BBQ experience

Broad range of delicious plant-based alternatives for grilling. Elevate your plant-based food experience to meet the expectations of those special moments shared with family and friends.

- Enjoy realistic plant-based versions of your BBQ favourites, such as different types of sausage, steak, chicken breast or ribs, traditional German Facelspiess //
- Discover marinated skewers with plant-based meat and veggies to explore different cuisines from Asia, Africa, and the Middle East through a range of exciting recipes, herbs and spices customised to plant-based ingredients.

N

Family favourites

Family favourites

Meat alternative products tailored for families, to enjoy together.

- No compromise on taste: delight in the assurance that even kids adore them!
- Perfect balance between delectable flavours and health-conscious choices, as these products boast low levels of fat and salt.
- Made with ingredients naturally rich in protein, calcium and vitamins.
- Convenient sharing/family format suitable for up to 4-5 people.

O

DIY Plant-Based mix

DIY plant-based mix

A range of affordable, convenient plant-based mixes to craft your own plant-based burgers, nuggets, sausages or full dishes.

- A nutritious dry easy to use product that delivers meatlike taste and texture in an affordable easy way: just mix with water and add your own creative touch with vegetables, herbs or seasoning to your taste.
- Easy to store in your cupboard, lasts longer than chilled items and is also more sustainable: it is lighter to transport (lower carbon footprint) and helps you minimise food waste at home as you can use exactly the amount you need.
- The range offers blends of protein-rich pulse ingredients (chickpea, pea etc) for a meatlike texture, with a light meat taste: the perfect way to create the plant-based dishes of your choice.

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15

# Consumers are craving for new alternatives for BBQ

European consumers see a high potential for plant-based BBQ products as the current available offer is not very satisfying when it comes to variety and quality.



As a result, the experience is often less enjoyable than it could be, and some consumers have expressed that they feel not fully included in this social BBQ moment.

## Not always good enough

“

*We grill a lot but we never know what to put on the BBQ – tiny sausages, hallumi is what we normally put, I have tried to grill other plant-based products but they were not eatable*  
(German consumer)

## Not enough variety

“

*There are enough plant-based sausages on the market, they've been “done”*  
(UK consumer)



A close-up photograph of a chef's hands in a white uniform, carefully plating a dish. The chef is placing a piece of white, cooked seafood (possibly scallop or fish) onto a dark plate that already contains green asparagus, red vegetables, and other seafood. In the background, a clear glass dish holds more ingredients, and a small silver bell sits on the wooden countertop. The lighting is warm and focused on the hands and the plate.

# What Reinvent Your Plate can mean?

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A close-up photograph of a chef wearing a white hat and a dark apron, focused on grilling food. The chef is using a metal spatula to flip several sausages on a black grill. The sausages are light brown with some char marks. In the background, a bright yellow object, possibly a pepper, is visible. The overall scene is set in a kitchen environment.

**Better mimicking option:  
meat alternatives closer  
to the real meat**



# Solutions for authentic BBQ Taste

## In plant-based and hybrid products

How to **replicate**:

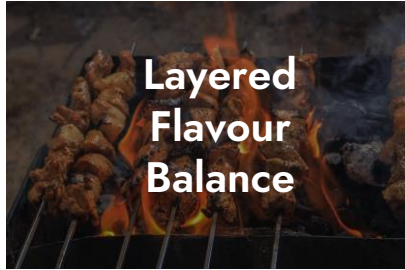


Juicy & Rich



**Succulence Tools**

Bring a flavour effect that mimics the sensations of eating a juicy, fatty and succulent meat.



Layered  
Flavour  
Balance



**TasteEssentials®**

Species & cuts  
signature

How to **avoid**:



Flat, One-  
Dimensional  
Taste



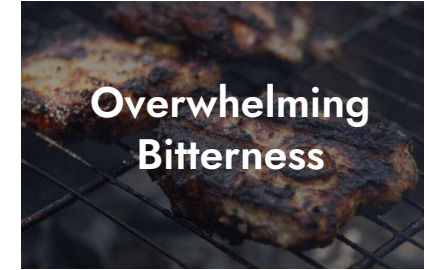
**Umami**

Brings depth, body and  
meaty foundation.



**Richness**

Create blends of taste and  
aroma to deliver a multi-  
dimensional taste profile,  
enhancing mouthfeel &  
complexity.



Overwhelming  
Bitterness



**Masking**



Understanding off-notes  
volatiles of your protein



Addressing bitterness  
and astringency



Validating the maskers  
in your plant-based product



# Solutions for authentic **BBQ Smell**

## In plant-based and hybrid products

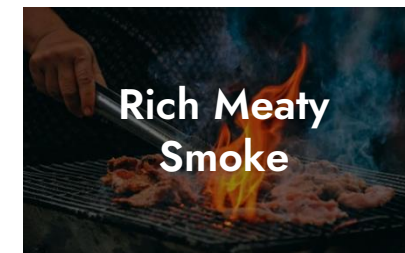
How to **replicate**:







### The Grills

Capture the authentic aroma of grilling with our captivating range of flavors - grill, burnt, charcoal, smoky, chargrilled, and flame-kissed - offering the widest options in the food industry.







Ingredient Types



Cut of Meat



Cooking Technique



Intensity

### The Culinary notes: Reaction Flavours

Recreate authentic BBQ aromas by bringing top notes, complexity, and flavor depth.







**Healthier meat  
alternatives**

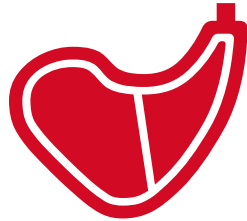
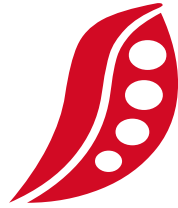
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**More sustainable  
meat alternatives**

# Protein Alternative market enabled by technology advancement

A continuum of solutions for a healthier and more sustainable future

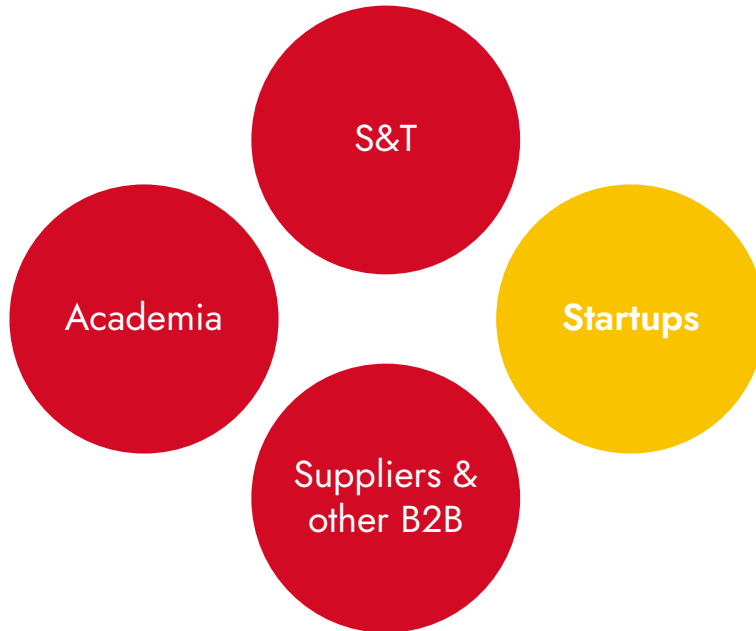


Animal Protein	Plant Protein	Plant Protein	Biomass fermentation	Precision fermentation	Cultivated meat
Beef, chicken, fish	Pieces	Whole cuts	Mycoprotein, alga	Broad scope (protein, fats...)	Whole animal parts
	<i>RTB: Readiness, availability, cost</i>	<i>RTB: Texture</i>	<i>RTB: Nutrition, sustainability</i>	<i>RTB: Targeted functionalities</i>	<i>RTB: Ethical, Scale</i>
<i>Challenge: Sustainability, ethical</i>	<i>Challenge: Taste, texture</i>	<i>Challenge: Taste, Affordability</i>	<i>Challenge: Taste, distribution</i>	<i>Challenge: Taste, Scalability</i>	<i>Challenge: Regulatory, affordability, consumers understanding</i>

# Our approach of innovation via collaboration

## Create the competitive advantage

### Givaudan's Innovation Power House



### A well-versed network to find and accelerate disruptive foodtech







# Truly not meat alternatives

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# Barbacoa Bliss

Plant-based Pulled

## 'Features'

### Protein

Soy HME, Jackfruit & Mushrooms

### Technology

Mix of vegetables and plant-based protein into a pulled format marinated with a tomato based chargrilled adobo

## Consumer Need

Crafted for plant-based consumers seeking the rich, slow-cooked flavors and tender texture of traditional barbacoa.

## Value Proposition

Barbacoa Bliss offers an authentic Mexican flavor experience, delivering deep taste and mouthwatering tenderness in an affordable plant-based recipe.

## Capabilities



- **Mix of vegetables and plant-based protein:** A pulled format marinated with a tomato based chargrilled adobo
- Primary **smoke-free flavour solutions:** compliant with the new smoke regulation
- **Grill solutions:** the **latest grills** delivering on profile authenticity, strength and affordability
- **Masking:** Mask soy off-notes and establish a flavor base.
- **Richness:** Recreate taste complexity from traditional cooking.
- **Umami:** New 2024 collection, focusing on performance and affordability.
- **Saltiness:** Holistic approach to consumer satisfaction in low-sodium environments.



Come taste it  
at our booth!

F4 & Lokaal 13

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# Q&A Session

Thank you

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