



TuttoFood 2026

Beyond Plants

The Evolution of the Plant-based
Space through Innovation &
Consumer lenses

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CHAPTER 1:

THE EVOLUTION OF THE PLANT-BASED SPACE

Duality of public opinion

Continuing boom?

Alternative protein patents skyrocket 960% in a decade as industry propels animal-free innovation



The Guardian

Oat milk rises to top as Britain's preferred plant-based drink

Lidl exceeds plant-based sales target by 700%



Or increasing concerns?

The plant-based problem: why vegan restaurants are closing - or adding meat to the menu



The Guardian

Plant-based meat has been relentlessly — and unfairly — attacked as “ultra-processed.” Can the industry save itself?

Is Nestlé pulling back on plant-based?



Sources: [The Guardian](#), [Vox](#), [Food Ingredient First](#), [The Guardian](#), [Food Ingredients First](#), [Food Navigator](#)

The plant-based movement continues to evolve

Plant-Forward



Mainstream appeal for plant-based is driving expansion to more market categories and regions

Plant-Based: The Canvas for Innovation



Nutrition and sustainability – plus increasing taste and texture expectations – play a bigger role in the next generation

Plant-Based: Unlocking a New Narrative



Underused ingredients and technology-enabled formats open up wider spaces for standalone plant-based innovation

Plant-Based: The Rise of Applied Offerings



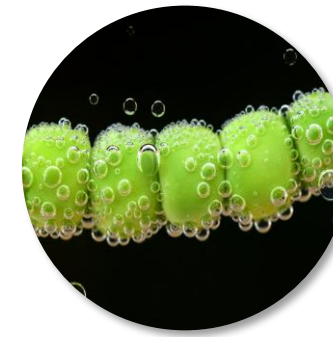
Adopting well-known dishes and formats offers familiarity and clarity to consumers keen to embrace plant-based products

Rethinking Plants



The intense buzz of plant-based alternatives has quieted, rerouting consumers' pursuits to plants in real and recognizable forms

Authentic Plant-Based



Plant-based is shifting from imitation to nutrition, with consumers embracing natural plant protein for its added benefits

2021

2022

2023

2024

2025

2026

CHAPTER 2:

THE STATE OF PLANT-BASED IN EUROPE

Plant-based innovation in Europe shifts beyond meat substitutes

Top F&B categories

% shares among all F&B products with plant-based/vegan claims (Europe, Apr 2025 – Mar 2026)



Source: Innova Database
Note: CAGR: Europe, Apr 2021 – Mar 2026

Consumers Are Shaping Innovation Priorities

What does the term plant-based product mean to you? – Consumers in Europe say:

45%

Made Entirely From Plants

30%

All Natural

23%

Better for you



TREND 5 AUTHENTIC PLANT-BASED

Alternative protein Natural Back to plants

Plant-based is shifting from imitation to nutrition, with consumers embracing natural plant protein for its added benefits.

Sources: Innova Trends Survey 2026, Innova Dairy, Meat & Plant-based Alternatives Survey 2025 (Average of 11 countries), Innova Database, [Green Queen](#)

Notes: Q1: "To what extent do you agree with the following statements?" % of consumers who answered "agree" & "strongly agree." Q2: "Which of the following do you consider to be a plant-based food or drink?"

Top Trends
Top Global Trends in Meat & Meat Alternatives
2026 – Global - Jan 2026

55%

“ Consumers in Europe agree that:

Plant-based products should be **standalone products** (not alternatives).

“ Consumers in Europe

What do consumers consider plant-based?

1. Vegetables & fruits
2. Nuts & seeds
3. Legumes



Plant-based salad bowl with **vegetables, grains and legumes**, no meat mimicry

🌐 Finland, Feb 2026



Plant-based. **High in fiber & protein.** Lower carbon. Lower water footprint.

🌐 United Kingdom, Aug 2025

TREND 5 AUTHENTIC PLANT-BASED

Fiber is a big health-related selling point for plant-based products.

Sources: Innova Trends Survey 2026 (Average of 11 countries), Innova Database

Note: Q: "Why do you choose plant-based sources to meet your protein needs?"

Top Trends
Top Global Trends in Meat & Meat Alternatives
2026 – Global - Jan 2026

Top reasons for choosing plant-based protein

Consumers in Europe who consume plant-based protein

“
It offers additional health benefits (e.g., fiber, antioxidants).”

“
It is easy to digest.”

“
It feels natural.”

Share of new plant-based/vegan F&B launches tracked with the following claims

Europe, Apr 2025 – Mar 2026

31%
High/source of fiber

3%
Digestive/gut health

3%
Natural



21% high protein. Plant based protein. Rich in fiber.

🌍 Italy, Jan 2026

CHAPTER 3:

WHAT'S BEYOND PLANTS?

The plant-based movement continues to evolve

The Plant-Based Strategy



The future of plant-based does not stand in claims or ingredients, but in the ability of companies to make meaningful solutions

Deliver on multiple health benefits



Strip it back with natural ingredients



Shift from Substitution to Product Experience



2027



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