



PLANT-BASED MEAT AND DAIRY LANDSCAPE IN THE SLOVAK REPUBLIC

Trends, products and consumer insights for 2020



Kingdom of the Netherlands



ČESKÁ VEGANSKÁ
SPOLEČNOST

CONTENT

3	Slovakia is opening up to its plant-based future
8	Plant-based alternatives to meat and meat products & sausages
9	Market overview
15	Opportunity to enter the market
16	Plant-based alternatives to milk and dairy products
17	Market overview
21	Opportunity to enter the market
22	Resources

SLOVAKIA IS OPENING UP TO ITS PLANT-BASED FUTURE

Plant nutrition is gaining popularity among Slovak consumers. As in many other countries, the initiators of the change are mainly young and highly educated people. However, the interest in reducing the consumption of meat and animal products is growing in basically all age groups. And the expanding range of plant products and alternatives on store shelves is reflected by that.

The most up-to-date overview of the Slovak consumer is provided by the Plant Nutrition in Slovakia survey, which was carried out for the “Jem pre Zem” (translates as “I eat for the Earth”) project by the Focus agency at the end of 2019. The analysis focused not only on how Slovaks approach plant nutrition, but also what buying habits Slovak consumers have in various plant categories. The results are in favor of the trend of plant nutrition. Unlike, for example, Czech consumers, **Slovaks are significantly more inclined to plant-based diets and are willing to change their eating habits, reduce animal foods or eliminate them altogether from their diets.**

Despite that, Slovaks are meat lovers, similar to Czechs, but they consume significantly less meat compared to other Central European countries. The data of the Statistical Office of Slovakia for 2018 show that each Slovak consumed

64.3 kg of meat, since 2017 consumption has increased by 2.4%, growth has also been registered in the previous years. Although this is a significantly lower consumption compared to neighboring countries and Slovaks are characterized by a lower level of meat consumption, the Statistical Office points out that the differences are also due to a different calculation methodology and, in fact, the consumption might be slightly higher than that.

More than 40% of consumers desire a change in their diet

According to the above-mentioned survey by Focus, almost 60% of Slovaks (59.1%) do not intend to give up meat and animal products in the future. Half a percent of the population eats purely vegan, 3% choose a vegetarian diet and 14.7% of Slovaks reduce their consumption of meat and animal products. In addition to that, **as many as 22.7% of survey respondents consider reducing the consumption of meat and animal products in their diet.**

If we look back a couple of years, to 2016, when the Nielsen Admosphere agency surveyed the number of vegans in Slovakia in a sample of 500 online respondents, the results showed that the Slovak internet population (approximately 3.7 million people) has 1% veg-

ans, 2% vegetarians and almost 11% of respondents reducing their meat consumption. According to Nielsen, these were probably the first figures about vegans in Slovakia. Expressed in numbers, in 2016 there were more than half a million people in Slovakia looking for sustainable and responsible options for their diet, today it is significantly more.

14.7% of Slovaks reduce their consumption of meat and animal products

Consumer interest in vegan, vegetarian or flexitarian diets was compared by the Focus agency to the 2017 survey results, and the results clearly show that the numbers of those who cut down on meat and animal foods have increased from 13.2% to 14.7%. and the number of those who consider such a change in their diet increased even by more than 5% - from 17.3 to 22.7%.

For Slovak consumers to have the motivation to try plant-based diets or

plant-based alternatives to meat or dairy products, it is necessary to find these products easily on store shelves. And Slovakia is not doing bad at all here, global and local producers and retailers are quickly reacting and bringing a more varied choice for those who already choose a purely plant-based diet and for those who are just slowly flirting with the idea of jumping on the plant-based trend as well.

Women are leading the way in reducing animal-based foods

If we look at plant diet lovers from a gender perspective, **women are clearly in the lead. More than half (51.5%) of them in the Focus survey said that they have already reduced, or are currently reducing, their consumption of meat and animal products.** Out of these, 0.4% were vegans, 4.9% were vegetarians, 20% were already reducing their consumption and 26.2% were considering this step in their dietary preferences.

Men are a little more conservative in their diet. 70.4% of Slovak men do not intend to change the animal component in their eating habits, as it is an integral part of their diet. However, less than **a third (29.6%) of men have already reduced or want to reduce their consumption of meat and animal products**, with 0.7% being vegans, 0.9% vegetarians, 9.1% of men already reducing their consumption of animal products and almost a fifth (18.8%) con-

sidered reducing.

Although plant-based eating is more the domain of women, in the end it may not be as hopeless with men either, because women have a direct impact on the composition of the family's diet. With varied and tasty plant-based foods, they can play a crucial role in motivating men in the future.

The change is brought mainly by the young generation

As in other countries, young consumers aged 18 to 24 are leading the way in reducing the consumption of animal products. Among them, almost a tenth are vegetarians (9.5%) and another more than a fifth (21%) reduce their animal consumption. However, if we look at the category of those who reduce or are about to reduce their animal consumption, the representation of age categories expands quite significantly to other age groups as well. It is far from the truth to say that only very young people limit or would like to reduce their consumption of animal products, and that this is therefore a trend that mainly affects one age group. It is also reduced or wants to be reduced by consumers in the age category of 25-34 years and 35-44 years. The biggest change, however, is brought by the youngest generation. Almost half of the students are reducing or considering to reduce their consumption of animal products. Out of these, 8.6% are vegetarians, 23.7% are reducing their con-

sumption and 15.8% are considering it.

Education also plays a key role in the growing interest in plant-based diets. It is dominated mainly by consumers with a university degree, 47.9% of them have reduced, are reducing or plan to reduce their consumption of animal products. 1.5% of them eat vegan and 3.3% vegetarian. Almost a fifth (18.3%) are reducing their consumption and almost a quarter (24.8%) are considering it.

Even the middle-age generation does not avoid a plant-based diet

A closer look at the older generation suggests that the willingness to change their eating habits is the lowest. In the category 65+, however, 1.1% of consumers are vegans and 1.6% vegetarians, and in addition to that, another 11% reduce their consumption of meat and animal products. The proportion of vegans in this age group is surprisingly higher than in the 35-44 years group. We can hardly find vegans in the slightly "younger" older generation (55-64 years), not many vegetarians (only half a percent), 12.5% are interested in reducing the consumption of animal products and 23.7% are considering it. Consumers from the 45-54 age group are considering to reduce their consumption the most, while 11.4% have already reduced it. Although the survey did not examine the main motives of consumers to change their behavior, it can be estimated that it is mainly influenced by an

interest in healthier eating, given that at this age people begin to experience the first health problems, often caused by poor diets and over-consumption of animal products. “Habit is an iron shirt” as we say in Czech and people do not change their eating habits over night. The growing number of those who eat purely vegan or vegetarian, those who are already reducing their consumption and especially those who are considering it suggests that the direction to a plant-based future in Slovakia has a very good and solid foundation.

More than 2,400 mentions in the media, dominated by online

Plant-based foods are at the forefront of consumers’ interest, especially for their health benefits. **People are increasingly interested in what they eat, where the food they buy comes from and how it is processed. Sustainability and ethics are also gaining ground.** The media, especially online, make it easier to access information. Newton Media focused on veganism and vegetarianism as the most well-known forms of alternative eating. It monitored media visibility not only in 2018, but also aimed to find out how the topic has changed in the Slovak media since 2010. In 2018, almost 2,400 information and mentions appeared in the media on the Slovak market, while the difference between the media coverage of veganism or vegetarianism is practically negligible.

While in 2010 the media dealt mainly with the explanation of both concepts, i.e. what veganism and vegetarianism mean and what the differences are between them, in recent years the topics have become more in-depth and are mentioned in a broader context.

Both topics are most mentioned in connection with a healthy lifestyle, but also in regards to the offer of restaurants or products. Topics also deal with the nutritional composition of food, vegan and vegetarian food preparation (recipes), the alternatives to meat and legislation. Although both trends in plant nutrition are mostly associated with health benefits, they also arouse some controversy. In almost a fifth of the articles, a negative context appeared, which, on the contrary, associates veganism and vegetarianism with a health risk, mainly for a certain group of the population (pregnant women and children).

Specialized websites, events and institutions help with public education

One of the popularizers of plant-based foods is the mentioned “Jem pre Zem” (I Eat for the Earth) project, which brings the topic even closer to ordinary consumers in a broader context. For example, consumers can take part in a

free plant challenge programme that not only provides them with more information on how to live more sustainably, but they also learn the basics of a plant-based diet and, through more than a hundred of inspiring recipes, their plant nutrients. “Jem pre Zem” also helps retailers and restaurants with a better understanding of the offered products and raw materials for the preparation of plant-based dishes. It points out in particular that the plant-based direction of the supply will bring them a new customer base and increase the turnover. In September 2020, the “Jem pre Zem” project organized the first professional conference Plant-Powered Future Slovakia 2020, which welcomed representatives of retailers, restaurants, food producers, representatives of the meat industry who are open to new solutions, new food start-ups and food tech investors.

At the end of 2019, companies that produce or distribute plant-based foods created a new platform as part of the section of the Slovak Association for Branded Products. It brings together international companies (Coca-Cola HBC, Danone, Dr. Oetker, McCarter, Nestlé, Unilever and others) as well as local players with the ambition to be a single partner for public institutions, professionals and the general public. The association took part, for example, in the dialogue on the European strategy From the farmer to the consumer and in the debate on the ban

on the use of labeling of plant foods derived from meat and milk names. As one of the first national platforms, the Association is part of the emerging European Alliance for Plant-Based Foods. There is a tangible effort to share experiences across disciplines and categories and to work together to develop a promising and growing segment of the food industry.

A number of specialized websites (for example) are also helping to popularize the topic, and food festivals also help. One of the biggest is the Vegan Feast (Veganské hody), which offers tens of thousands of Slovaks the best of the sustainable and responsible cuisine. During the spring coronavirus pandemic, the event was even held online for the first time. Through a live broadcast on Facebook, the organizers acquainted the audience with interesting lectures, a cooking show, involved them in interesting discussions and fun challenges, while in restaurants all over Slovakia, people could pick up a special plant-based menu through the delivery window. Supporters of plant nutrition were called upon by the organizers to save plant-based restaurants in times of crisis with the “#zachranrastlinnegastro” campaign (translates as #savetheplant-gastro). The campaign brought together plant-based and vegetarian restaurants from all over Slovakia and offered customers either a personal pick up or home delivery in cooperation with one of the local delivery services.

PLANT-BASED ALTERNATIVES TO MEAT AND MEAT PRODUCTS & SAUSAGES

The topic of plant nutrition resonates in the Slovak society very well, the media pay attention to the topic and new companies are constantly emerging in Slovakia that are actively involved in plant production and creating our plant-based future. Plant alternatives for meat and sausages (smoked meat products) are thus gaining in popularity and consumers are more and more often looking for them on store shelves. Not only companies that respond to the trend pay attention to this, but also retailers who are trying to bring successful products and brands to market.

According to a survey by Garden Gourmet (Nestlé), consumers usually enter

the plant food category through burgers. Their offer is expanding on the Slovak market and, therefore, consumers have plenty of opportunities to try the path to a meatless (and yet full of flavor) plant future.

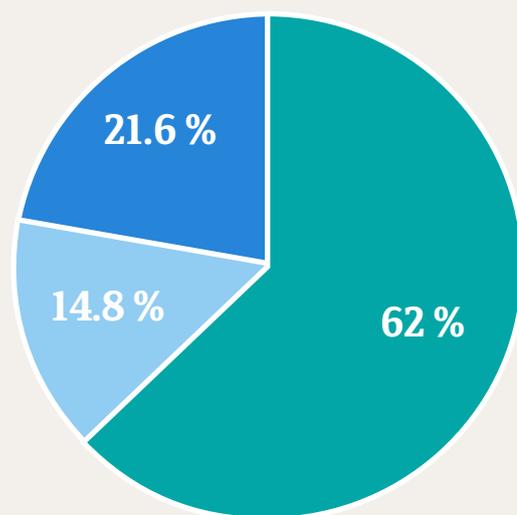
A survey by Focus shows that approximately 4 out of 10 respondents buy alternatives to meat and meat products or milk and dairy products.

In 2019, more than a third of Slovak households (36.4%) bought plant alternatives of meat and sausages at least once. More than a fifth (21.6%) bought them once or twice, and 14.8% of respondents went for three or more purchases.

Purchase of plant alternatives of meat and sausages

Have you or your family purchased (and how often) in the last 12 months?

- 62 % no, I don't know
- 14.8 % three or more times
- 21.6 % once or twice



Source: Jem pre Zem, Focus, 2019

MARKET OVERVIEW

Alfa Bio (Lunter)

The Slovak family company Alfa Bio was founded in 1992, but the family was actively interested in healthy nutrition only 10 years earlier. The small family business soon grew into a modern company which, thanks to its rich know-how and new technologies, sets trends in the tofu-based plant market. The company is the second largest producer of tofu in Europe and processes exclusively soybeans grown in Europe without any use of GMOs.

The company supplies (not only the Slovak market) with its diverse range of tofu products for both savoury and sweet food lovers under the Lunter brand. These are mainly natural plant-based spreads in various flavors and tofu in flavoured options, such as smoked, basil, thyme, marinated and sweet chilli.

A novelty in their assortment of plant alternatives to meat and meat products are vacuum-packed tofu-based spicy and delicate sausages that are smoked with beech wood smoke. Another novelty in the company's range



New ready-made meals from Alfa Bio

are ready-made meals, by which the company tries to meet the demand of plant food lovers for traditional meals offering a plant alternative. These are, for example, plant-based roast with onion, Bolognese sauce, Koložvár cabbage with groats, plant-based liver or meatloaf mixture. Various types of burgers, falafels and fillings (e.g. for dumplings) can be easily made from the plant meat mixture. Lovers of traditional meat-based dishes can therefore try a tasty plant alternative. The products are easily and quickly prepared and ready-to-eat. For example, the consumer just needs to heat up the roasted meal on fried onion. Lunter products are available in most retail chains or health food stores.

Garden Gourmet (Nestlé)

Nestlé Slovakia introduced a brand of meatless products in the spring of 2020. As an international player, it plays a significant role in building the entire category of plant alternatives. The products are manufactured directly in the Czech Republic in the production plant in Krupka, from where they have been successfully supplied mainly to Western European countries for many years already, which means that the products do not travel half across the world to their end consumers.

By entering the market, the company responded to the lack of supply on the market and also the ever-growing interest of consumers in reducing the con-



Garden Gourmet's flagship product: Sensational Burger

sumption of meat and animal products. People are willing to try plant products, live healthy and do something for the planet, but at the same time they do not want to give up the experience of meat and taste also plays an important role for them. It is taste that is key to the success of a product, and the Nestlé brand devotes considerable resources to the development of new products, not only from a nutritional point of view, but also from the taste point of view. Most refrigerated meals contain soy and wheat proteins, in the future the company would like to work with peas.



The brand's range includes three product lines (Meat Alternatives, Premium Sensational and Vegetable Goodies), which offers a total of seven products. In meat alternatives, customers will find Veggie schnitzel, which is a plant replacement for one of the traditional and very popular Czech dishes. Then there are Veggie strips, which can be easily used in recipes instead of chick-

en, due to their specific structure. The range is completed by Veggie balls and Veggie burger. Vegetable goodies offer two products - Veggie rondo spinach & cheese and Falafel.

The Sensational premium line is currently the company's flagship with its Sensational Burger. According to the company's representatives, burgers are a turning point through which many customers enter the plant category. Since October 2020, Sensational Burger has improved its recipe and thanks to a new processing method it contains a larger proportion of soy protein and at the same time has less fat. (Sensational Burger was previously sold under the name Incredible Burger, due to complaints from Impossible Foods and a subsequent court decision, the company had to rename it). Currently, the company is working on improving the existing recipes and developing new products that should appear on the market in 2021. It wants to strengthen the segment of "white meat" alternatives, but new products should also appear in the Sensational line. In addition to the refrigerated range, the company is also considering the frozen products segment.

Garden Gourmet is gaining strength, especially in retail, where despite the initial distrust of buyers it succeeds in convincing the representatives that the category makes sense, and especially if it has a varied offer, because it means better sales. Most products can be pur-

chased at Kaufland, Billa or Fresh plus and in selected stores on the traditional market (CBA, COOP). Since November 2020 also at Tesco.

Veto Eco

The Czech company Veto Eco supplies a wide range of products based on tofu and soy, wheat and pea protein. The products do not need to be heated up for a long time and their taste can be further enhanced with spices. In the category of plant meat alternatives, products under the VegiSteak brand are known in a number of options.



Plant-based meat alternatives from Veto Eco

For example, VegiSteak Kukuřizek, which is an alternative to meat schnitzel with a juicy and fibrous texture, made from tofu, wheat protein, peas, rapeseed oil and corn. They are pre-fried, so they can be easily heated and consumed immediately, or prepared on the grill or as a natural steak or fried in breadcrumbs. In the process of grilling, VegiSteak products gain a tender consistency and a juicy core, which will satisfy customers' need for meat taste. VegiSteak čevapčiči and VegiSteak tofu strips also offer similarly rounded textures and flavors.

In 2019, the company introduced new recipes and enriched the offer of plant meat alternatives with VegiSteak vegan patties. In addition to standard raw materials, the company enriched it with quinoa and sun-dried tomatoes. The product is pre-fried, so it is again characterized by a very easy preparation. Another novelty was VegiSteak yakoma-so - spicy slices that resemble beef in taste and texture. After heating up, they can replace meat in traditional Czech cuisine, such as the famous svíčková (sirloin sauce). VegiSteak yakoma-so can also be prepared as a classic burger.

The company's offer also includes Vegetarian sausages (made from tofu, buckwheat, vegetable oil and egg white), Vegetarian sausages or Tofu nuggets with cheese. Veto Eco's product range includes a diverse range of Patifu tofu spreads or a classic range of natural, smoked and Tofu burgers. It is the Tofu burger, as a flavored and shortly-fried slice of natural tofu, that during the frying process it strengthens its consistency and then tastes like a slice of meat, which can be further prepared as a burger or used to replace meat in other dishes.

Consumers also appreciate the meaty taste with the addition of herbs in the product line of vegetarian salami. The company offers them in variations of herbs, delicacy, hunters, paprika and with a plant chicken-like taste. The company achieved this with a special recipe

with plant seasonings that resemble the taste of roasted chicken. Salami can be used instead of meat sausages in both cold and hot cuisine.

Beyond Meat

The California company has been made famous by its plant-based burger Beyond Burger, which is very similar in taste and structure to the classic beef burger. The main raw material is pea protein, in addition to that also bamboo fiber, coconut oil, yeast and other flavoring ingredients. The burger does not contain soy or gluten. The brand entered the Slovak market in June 2019 and consumers can buy it, for example, in Kaufland stores, the Slovak retail network Yeme and Metro. Beyond Meat also penetrates the gastronomy - customers can taste it at the street food Vegan kiosk in Bratislava and it is also offered by Urban House or Re:refresh restaurant.



Beyond Meat burger



K-take it veggie (Kaufland)

From retail chains in Slovakia, Kaufland probably offers the widest range of plant alternatives across all categories. Within its K-take it veggie's own brand, these are, for example, spaghetti bolognese or lasagna. But the retailer also offers well-known brands, such as Garden Gourmet, Vege4fun, Lunter, Beyond Meat, Veganz, Queen of Peas and many others. The offer also includes tofu products.

Naturli'

Products of the Danish company Naturli' Foods A/S have been distributed on the Slovak market by Ekvia since the end of 2019, and consumers will find it exclusively at the Tesco retail chain. The offer includes Naturli' ground meat and Naturli' burger. Vegan products are made on the basis of pea protein, which is in 80% grown in Denmark. Both products offer consumers space for culinary art without meat.

Opékáčky, Vegárky (Sojaprodukt)

The Slovak company Sojaprodukt has been producing a new generation of food products since 2000 and offers several dozen products with good dietary and taste properties on the Slovak, Czech, Hungarian and Austrian markets. Thanks to new technological procedures, it mainly offers plant sausages on the market. Vegárky are a gluten-free plant variation of soy sausages, which can be very easily prepared by boiling for three minutes. The company also offers De Luxe Vegárky with a mixture of hot spices and sea salt and Vegárky Zeleninové (Vegetable-based). Smoked soy sausages Opékáčky are also suitable for cold consumption or heat preparation. Soy slices also offer plant meat alternatives. The range is completed by natural, smoked and flavored tofu.

Goody Foody (Alfa Sorti)

Goody Foody is a Slovak family brand of meatless refrigerated and frozen products, which are close to meat in appearance and taste. Their preparation is very quick and simple, they can be consumed mostly without heat treatment, or the heating is in a matter of minutes. Alfa Sorti offers its range in refrigerated and frozen variations by weight also for the gastro and HoReCa segment.

The chilled and frozen range of vegan burgers includes Goody Foody Gyros & Kebab, which is made from non-GMO

soy and a mixture of spices that give it a specific taste and juiciness. Other products include Vegan soy goulash cubes, Vegan ground soy and vegan balls, strips and burgers (Vegan burger and Vegan Red burger, which contains beetroot). An interesting alternative is also the Vegan steak with chicken flavor or Vegan Steak with beef flavor, which both contain wheat and soy plant proteins, pea fiber, onion and a mix of seasonings. The heat treatment is simple, just roast it in a pan for half a minute or heat it in a microwave for a minute.

For further processing, the company offers soy cubes, slices, strips and granulate.

Other brands on the market

Klobaňa (Good Nature)

The Slovak company produces plant alternatives to sausages, long-shelf-life salamis and kebabs. Its products include, for example, a plant alternative to the legendary Hungarian sausage - Hungarian Klobaňa, smoked classic and spicy in two options (300g and 550 g), Vegan kebab or Vegan smoked meat. The products are refrigerated, intended either for immediate consumption or for heat treatment. For example, Vegan smoked can be used by consumers in a number of traditional recipes, such as goulash, *svíčková* (sirloin), stuffed dumplings and wherever else where there would be soy meat or seitan used.

Robi (Eurobi)

An alternative to meat and sausages is offered by the so-called Robi, which is based on wheat protein. The company offers a portfolio of products that need to be heat-treated and seasoned before consumption (Robi slices, strips, meat-loaf or ovals) as well as ready-made meals (schnitzel, patties with sauerkraut, hamburger with cabbage, Chinese style and more). There is also a plant alternative to steak tartare and spicy mixture as a plant alternative to meat mixtures. The company also offers a portfolio of popular delicacy snack salads, where classic sausages are replaced by Robi.

dmBio

The dm drugstore network offers a wide range of organic products that are suitable for both vegetarians and vegans. In the category of plant meat alternatives, dmBio offers Jackfruit Natur, which is an excellent source of fiber, contains no gluten and the fibrous structure and texture of this Asian fruit resembles meat.

An alternative in the sausage segment are the vegetarian Bavarian sausages, which contain soy, tofu, seitan and seasoning spices, and dmBio Vegan Snack for seitan-based toasting, and a smoked version which is flavored with an aromatic mixture of spices containing coriander, cardamom, turmeric, ginger and nutmeg. The menu is completed

by dmBio Vegan snack, a vegan alternative to classic sausages rich in protein. It is made from a combination of tofu, wheat protein and peppers and its advantage is the form of an easy-to-eat snack, so the product can be consumed directly without any further cooking.

In addition to plant meat alternatives, dm also offers organic tofu - almond & hazelnut, smoked and natural. All are suitable for toasting and can be stored uncooled.

Bonavita

The Czech family company Bonavita distributes products from defatted soy flour on the Slovak market - Soy cubes, Soy strips, Soy granulate, Soy slices and Maxi slices, all products are in a dehydrated form, intended for further cooking. As part of the vegan and vegetarian special offer, the Lidl retail chain offers minced meat and burgers.

Opportunity to enter the market

Although the Slovak market is not as developed as in the Western countries of Europe, the categories of plant alternatives for meat and sausages are not unknown to Slovak consumers and there is an offer of international, as well as local companies on the market.

The offer includes refrigerated, frozen and dry mixtures, yet the offer is not so varied and so widely available and there is certainly room for new brands on

the market. With the increasing consumer interest in plant-based foods, as evidenced by numerous surveys, it can be assumed that people will be actively looking for these products on store shelves. Retailers respond to the situation both by offering their own private labels, where there is certainly the possibility of cooperation in the future, and those that have a greater potential to bring more and more customers to the category of plant nutrition, especially through sophisticated marketing and targeted communication.

The key factor for the success of the brand will continue to be the taste of the product, which is especially important for flexitarians, who represent the most important target group for the development of the entire plant nutrition segment. In addition to taste, the aspect of health benefits is important for consumers, and we must certainly not forget the price, because the Slovak consumer is very sensitive to it. With the upcoming economic downturn caused by the coronavirus pandemic, the purchasing power of Slovak consumers is likely to go down, so the price will play a very important role in the future and open up space for discount players to offer lower-priced products.

It can be expected that the plant supply in the gastro and HoReCa segment will also grow, but also here it is necessary to take into account the currently unpredictable situation due to the coronavirus pandemic.

PLANT-BASED ALTERNATIVES TO MILK AND DAIRY PRODUCTS

Plant alternatives to milk, dairy products and cheese are not unknown to Slovak consumers. According to a Focus survey, 38.9% of households bought plant alternatives to milk and yoghurt in 2019. More than a fifth of households (21.1%) bought them once or twice, three or more times 17.8% of respondents.

And the cheese alternatives are definitely not doing bad either. In 2019, 41.2% of

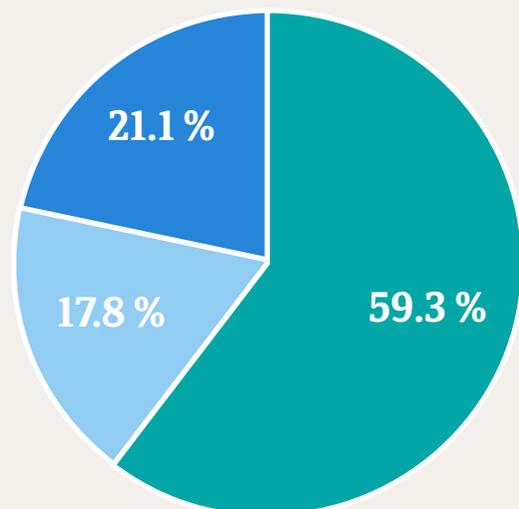
households bought them, while 18% of them bought them three or more times and 23.2% bought them once or twice.

With a sufficient and attractive offer in stores (and a good price), plant-based dairy alternatives have a chance to gain the hearts of the loyal customers.

Purchase of plant-based alternatives to milk and yogurt

Have you or your family purchased (and how often) in the last 12 months?

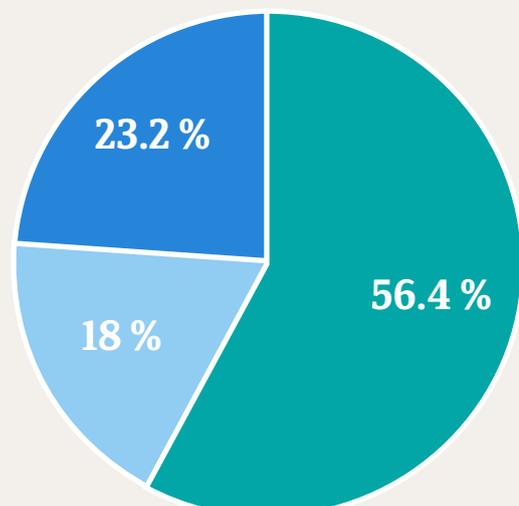
- 59.3 % no, I don't know
- 17.8 % three or more times
- 21.1 % once or twice



Purchase of plant-based cheese alternatives

Have you or your family purchased (and how often) in the last 12 months?

- 56.4 % no, I don't know
- 18.0 % three or more times
- 23.2 % once or twice



MARKET OVERVIEW

Alpro & Provamel (Danone)

In 2016, Danone bought the Alpro brand, which expanded the company's conventional dairy portfolio with a plant-based programme. This includes beverages, coffee, plant yoghurt alternatives, desserts, ice cream and plant cream alternatives. The category of drinks offers plant alternatives made from almonds, soy, coconut, oats, hazelnuts, rice and cashews (Alpro Drink with cashew nuts), the offer also includes a balanced mixture of Alpro Coconut-Almond drink. Plant milks (drinks) come with flavours or unflavoured, with vanilla and chocolate most often to be used as flavours in soy and almond plant drinks, the chocolate variation is also included in the Alpro coconut drink. In the coffee category, the Alpro brand offers two plant-based coffees - coffee

with almond drink and coffee with soy drink with caramel in a 235ml ready-to-drink package for immediate consumption. In 2020, the plant soy drink with caramel won an award in the Food Chamber of the Czech Republic Award for the best innovative food product in the "Food for special nutrition" category. Plant alternatives to yoghurts are offered by the Alpro brand in two options (150g and 500 g). The 550g package contains white plant yoghurt and a variation with coconut and almonds. The smaller package of plant yoghurts offers a wider range of flavours, in addition to the classic white that is raspberry-cranberry, peach, blueberry and strawberry.

In August 2020, the company expanded its offer with a new line of Absolutely Coconut - plant-based fermented products based on coconut. They are available in a natural white variation and in two flavours - raspberry and pineapple. Alpro desserts in a package of 4 x 150 g



offer flavours of coconut, vanilla, chocolate, dark chocolate and caramel. In the ice cream category, consumers have a choice of two options - Alpro hazelnut ice cream - chocolate and ice cream with soy and vanilla flavour. In plant cream alternatives, the Alpro brand offers four products that are suitable for a wide range of sweet and savoury recipes. In a 250ml package, there is a soy, coconut and rice alternative to cooking cream, and from October 2020 also an oat-based option.

The Alpro brand is very active in communicating with its customers not only at the point of sale, but also on social media. It draws consumers' attention to interesting news, offers inspiring recipes and draws attention to a number of environmental topics (sustainability, carbon footprint).

The Danone portfolio also includes the Provamel brand, which offers a range of plant-based drinks, desserts and cream for cooking and in organic versions.

K-take it veggie (Kaufland)

The private brand K-take it veggie was launched by the Kaufland retail network in 2016. The offer includes soy, almond or rice milk, yoghurts and spreads, and the offer is constantly expanding. The quality of products, such as Veggiegurt K-take it veggie, was also confirmed by the domestic consumer magazine dTest. In August 2020, Kaufland introduced other K-take it veggie products

in its stores, such as coconut yoghurt (natural and mango & passion fruit), an unsweetened almond drink or an organic rice drink. Most products are organic, for the rest the company plans to expand organic versions as well. New milk products and flavours are also being made ready for the market.



dmBio

The dm drugstore network offers a wide range of organic products that are suitable for both vegetarians and vegans. In the category of plant alternatives to milk and dairy products, it offers soy, coconut, oat, almond and spelt plant drinks under the dmBio brand. They are available in natural and flavoured options.

In the category of cream alternatives, dmBio offers a soy and oat version. The offer of vegan desserts is represented by dmBio dessert with coconut and cashew vegan dessert. For a quick snack, two types of coffee are available - dmBio Cashew Macchiato and Coconut Mango Lassi. In addition to the dmBio brand, the drugstore chain also offers

plant drinks from the Joya and Alpro brands.

PlantOn (Jogurty Magda)

The Polish company Jogurty Magda is a great example of a nice story on how a company can respond to trends and in the end switch to a 100% plant-based production due to high demand. The company offers plant yoghurts and coconut-based drinks under the PlantOn brand. Fermented vegan yoghurts are sold in flavours - natural, blueberry and exotic pineapple-mango. The company is also expanding its product range to the on-the-go segment, including PlantOn Coconut Drink Cold Brew Coffee and PlantOn Coconut Drink Strawberry Banana.

Green Day (Olma)

Traditional dairy producer, a Czech company Olma, has entered the plant market with its Green Day brand, based on fermented oats. The products contain well-known strains of yoghurt cultures and probiotic cultures, which affect the good composition of the human microbiome, as well as vitamins

and calcium. The company offers an alternative to natural yoghurt, strawberry with lemon and mango, and in addition to the natural variation, vanilla and forest berries mixture are also prepared for plant drinks. In the future, the company plans to enrich its range with protein mixture products.



Vege4Fun (Dairy4Fun)

Dairy4Fun has enriched its dairy product range with the vegan brand of plant alternatives Vege4Fun. Since 2020, it has been offering plant coconut yoghurts on the market in several flavoured variations - blueberry, raspberry, strawberry and pineapple with mango. In addition to them, the brand also offers coconut probiotic drinks in natural, strawberry and cherry variations.

Body & Future (McCarter)

McCarter is a Slovak company that produces plant-based functional drinks, yoghurts and creams. The company has collected various world awards for its plant functional milk products, for ex-



ample in 2017 when it won an award at the global food fair Anuga for its Body & Future coconut and almond plant drink, which in addition to protein and chia seeds also contain pieces of fruit, vegetable puree and fruit pulp. Body & Future coconut drinks again won the SIAL Innovation Selection award in 2018. The company offers coconut, almond, hazelnut and oat plant milks.

In the plant yoghurt segment, the company offers natural coconut yoghurt and flavoured with mango and blueberry variations with black currants. The on-the-go beverage segment contains a 0.33l PET bottle Body & Future coconut & strawberry and hazelnut & chocolate.



There are also products for children, such as the Body & Future Kids coconut-oat strawberry drink or chocolate vegan baby coconut-oat drink. The company also offers plant creams.

Plant Drink (Lunter)

Soy-based fermented plant drinks under the Plant Drink brand are produced by the Slovak company Alfa Bio in five flavours - natural, blueberry, strawberry, vanilla and chocolate.

Ben & Jerry's, Magnum, also Hellmann's (Unilever)

In the ice cream range, Unilever offers vegan variations of the Ben & Jerry's (Vegan Coconutterly Caramel'd) and Magnum (Vegan Classic and Almond) brands. Unilever also offers vegan mayonnaise (Hellmann's Vegan).



NoMilk

The NoMilk brand offers an assortment of plant ice cream alternatives on the market in six attractive flavours - chocolate, vanilla, cinnamon, raspberry, mango and lemon & mint. Ice creams are sold in 180g paper cups and customers can buy it, for example, at Kaufland, Billa or Tern.

Sojolka (Sojaprodukt)

The Sojaprodukt company offers soy mayonnaise and tartar sauce under the Sojolka brand. In the category of plant cheese alternatives, it offers a natural and smoked variation under the Tavenýr

brand. Desserts include rice (Kika in various flavors), soy (Sojáčik in various flavors) and poppy seed desserts.



Violife

Violife is a brand of the Greek company Arivia (bought by the Upfield Group in 2020), which produces plant-based dairy products from coconut oil. It offers a wide range of classic, as well as special cheeses, such as gouda, cheddar, eidam, mozzarella or parmesan.

Crema Vega (Dr. Oetker)

Vegan products based on soy with a creamy consistency, intended for cooking, softening meals or preparing various dips.

Mayonnaise and tartar sauce “Doma”

In August 2020, the Slovak traditional company Doma launched its vegan egg-free tartar sauce and mayonnaise. As part of the vegan and vegetarian special offer, the Lidl retail chain offers vegan ice creams, and soy, oat and almond milk from private labels as part of its permanent offer.

Opportunity to enter the market

As with meat and sausage alternatives, the market is ready to open the doors to new milk and dairy alternatives, including cheese.

Slovak consumers are not ignorant to this offer and international and local companies are responding to the interest and bringing new products to the market. However, the offer is not yet as varied as in Western European countries and with the increasing consumer interest in plant-based foods, as evidenced by numerous surveys, it can be assumed that people will actively look for these products more often on store shelves, as they will be more interested not only in their health, but in general there will be a growing interest in the topic of sustainability and modern food industry.

As in other categories, price will play a significant role here, and if the impact of a coronavirus pandemic significantly affects the economy, customers will increasingly look primarily at the quality / price ratio.

RESOURCES

1. FOKUS (2019). Prieskum rastlinného stravovania na Slovensku. From MILEC, Marian (2020). Rastlinné stravovanie na Slovensku v roku 2019. Jem pre zem. Bratislava.
2. TRNKOVÁ, Jana (2019). Vegetariánstvo a vegánstvo v slovenských médiách. Newton Media. Bratislava. Available from: <https://www.medan.sk/vegetarianstvo-a-veganstvo/>

PLANT-BASED MEAT AND DAIRY LANDSCAPE IN THE SLOVAK REPUBLIC

Trends, products and consumer insights for 2020

CONTACT THE AUTHOR

Martin Ranninger
martin.ranninger@veganskaspolecnost.cz
+420 720 658 032
veganskaspolecnost.cz
Czech Vegan Society

CREDITS

TEXT

Jitka Hemolová, Jitka Vršovská

PHOTOS

Eva Hemmerová, Czech Vegan Society archive, Adobe Stock

GRAPHIC DESIGN

Martin Ranninger



Kingdom of the Netherlands



