

Codes		Definitions
'Rejection' often driven by lack of understanding		Rejection of alternative protein is often driven by a lack of understanding. With some education, a lot of people will be willing to at least try
'Meat belongs at dinner' mentality in decline		The 'normal' aspect of meat is lowering in the Dutch culture, not eating meat is also considered normal
'Plantify' existing products subtly to reduce consumer resistance		In blended meats, start to add plant-based protein to meats, communicating it only on the back of the pack (subtly) to reduce consumer resistance.
'Rejectors' in future only convinced by price		In the future, the deciding factor for the true 'rejectors' will be the price. At some point, meat will be expensive and plant-based will be cheaper.
Affordable private label offerings		Supermarket often sell their own 'private label' plant-based products, which are marketed as more affordable
Aggressively suing as reason for consumer distrust in industry		American multinational companies aggressively suing to protect their patents, feeds consumer distrust in the industry and the idea that companies are just out for profit
Amount of older consumers will decrease		As the years pass, older consumers (who are more likely to be alternative protein rejectors) will 'head out'
Any claim increases marketing		Consumers like claims on packaging, no matter what claim, it will sell better if it has a claim on it
Attitude as factor in protein transition		In the context of people wanting to make a change, people viewing products as a solution to ie. Climate change or the food shortage
Attractiveness as important product quality		People should feel like they want to eat the product
Authenticity as factor for naturalness		'Authenticity' or traditional foods do not seem to evoke the association with ultra-processed, while non-traditional foods do

Balancing when to switch from subtle to explicit ingredient communication		Subtle communication is only on the pack of the pack. This should be the starting strategy, to not evoke more questions than needed. At some point when you are including a whole range of products, then you should think about communicating the ingredient on the front pack or through brochures etc.
Consumer routine rigidity as adoption barrier		People's (purchasing) behaviour is quite difficult to change because they have a certain routine that is very difficult to change. Also, buying behaviour is not always correlated with people's opinions on certain aspects. For instance, while people say they care about sustainability, they might not factor that into their purchasing decisions
Benefit communication through different channels		Benefit communication can go through different channels/partnerships such as with cooks/lifestyle coaches/nutritionists
Better meat imitation costs more		In general, meat imitators are not great at imitating meat. Only the ones that are more expensive come somewhat close
Blended meat mostly for kids in US		In the US blended meats are more likely to be marketed for children, as a way to eat some sort of vegetables
Blended meat price issues		Blended meat should be cheaper to be considered attractive, but in the case of mycoprotein/chicken it does not become cheaper
Blended meats to let meat eaters try plant-based		Blended meats as a 'gateway' for meat eaters into some plant-based meat
Brand-driven (Dutch)		The Dutch meat imitator market is mostly brand-driven
Broadening target audience challenge		The next challenge is the broadening of the target audience for alternative protein products, the 'early majority'

Cannibalization of plant-based can pose a problem in blended		When introducing blended meats, it might impact plant-based meat sales negatively
Changing definition flexitarianism		It used to be 4/5 days a week no meat, now it is more like 1/2 days a week no meat
Choosing right associations with existing products		When putting a product in the market, you should think about what you want people to associate with it. If you market mycoprotein as 'mushroom root' or something similar, people will think 'this product fits well in dishes I know with mushrooms'
Combining capital as reason for consumer distrust in industry		-
Communicate more openly after people are convinced		Explicit communication only after people are already using the product, You don't want to raise unnecessary questions
Communicate when introducing range of products		Explicit communication only after introducing a whole range of products. You don't want to raise unnecessary questions
Communication with NGOs to prevent misleading		
Companies diversifying on target groups		Different companies are starting to target specific groups, and companies are choosing different groups to target
Complementaries		
Conflicting views on communication strategy blended meats		Some Dutch supermarkets choose for explicit communication strategies, while some experts think that is not the way to go
Decreased role of sustainability and animal welfare in decision making		Consumer demand has changed in such a way that sustainability is not as important anymore in making a purchasing decision
Consumer perception as factor in protein transition		How consumers view alternative protein plays a role in the protein transition
Convenience as driver		Convenience (ready-to-eat food) can be a driver for plant-based meat consumption

Cultural barrier		In some cultures there is an emphasis on meat in dishes, therefore it could pose a barrier for plant-based meat usage
Cultured meat example of bad story		Cultured meat doesn't have a direct tangible benefit story surrounding it (yet). Sustainability is not enough, and the state of the current technology is not yet better than conventional meat
Current industrial focus on quick profits		In industry, focus is often on quick profits and not on long-term goals
Declining US sales		Sales of US plant-based meat is declining
Decreased focus on protein source		A trend is observed where the focus is not put anymore on the ingredient type, soy/pea/etc.
Decreasing focus on communal benefits		People factor communal benefits such as environmental concerns or animal welfare issues into their decision making less than before. Focus now is on tangible personal benefit
Definition of plant-based blurry		Most people see 'plant-based' as everything that tries to be meat or tries to replace meat. Even if its origin is microbial for instance.
Dietary need for fibers		There is a dietary need for more fibers in food in Europe
Difference between consumer base of different retailers		What consumers want from the product already changes significantly based on which supermarket they go to
Differentiation between wanted health benefits		Different parts of the US markets might look for different types of health benefits
Differentiation of category could emphasize category benefits		If mycoprotein, a microbial based food, would be marketed as a separate category from plant-based meat, that could lead to association with benefits
Difficulty in determining when to need transparency		Being transparent is considered a fine line, too transparent and you'll raise questions, but not transparent enough and people will distrust you

Direct tangible benefit important for early majority		A direct tangible benefit, such as improved gut health, energy, etc. is becoming more important. Especially for the 'next' group of customers, the early majority
Discovering drivers and motivators		Of a new group of customers, their drivers and motivators should be researched
Distrust in food industry and technology		People can be skeptical of novel food products or the use of processing because they don't believe companies to have their best interests at heart, sometimes rightfully so
Diversity of offering as reason for adoption		The increased availability of various types of products has increased adoption of plant-based meats
Don't hide information		In the cases of subtle communication and transparency, you should never 'hide' information. Disclose what you legally are required to, and what consumers would feel is necessary
Drop-in replacement		Connected to convenience, make plant-based 'burgers' so people can use them as they would make animal-based 'burgers'
Education on technology and associations		There is some amount of education that needs to happen so people understand the technology better, that way it could lower the barrier for some people to try the product
Energy as benefit		Energy' is one of the benefits that people are interested in
EU claim regulation as limitation		In the EU, claims are regulated to make sure they are factually accurate
EU regulations hindering innovation in GM		Mainly the time and uncertainty to get approval for a GM food product

Explicit communication as reason limited appeal blended products		Explicit communication on 'plant-based' is not useful (according to the expert), because it does not convey a benefit that most consumers are interested in
Explicit communication of benefits		Benefits can always be communicated explicitly
Falafel not evoking resistance		Falafel is an interesting example, the 'falafel balls' are processed of course, but they do not seem to evoke the same resistance that meat-imitators sometimes receive
Feeling vulnerable because of government (EU) lack of response		In the case of Monsanto; at first the EU did not want to prevent Monsanto from introducing their GM product to market, even though they did not want to label it as GM. Consumers, informed about this through NGOs, felt vulnerable because the EU did not do anything
Fiber as a rising nutrient		Fiber is rising in terms of potential for tangible benefit, usage in health claims, nutritional benefits. Health organisations are supporting perceptions of fiber
Fit in recipies		Companies should think about how well their product would fit in different recipies
From consumer perspective, purchasing behaviour doesn't change		For instance when introducing blended meats subtly, ie. Only mentioning the plant-based ingredient on the back, the consumer view is that their purchasing behavior doesn't change; they are buying the same product they were before
Flexitarians as promising market		
Focus health increasing		Focus on health when choosing foods is increasing, specifically on (potential) health benefits
Focus on ingredients with existing perception		When focusing on health benefits, focus on ingredients that have known benefits associated with them (supported by multiple industrial/academic sources), like protein and fiber

Focus on taste rather than on ingredient		For the early majority, the next group to target with plant-based meats, the taste and taste descriptors are much more important than the origin of the ingredient
Food-informed consumers care about origin		Consumers that care a lot about food and are very food informed, may care about the origin of the food however
GM (Genetic Modification) for texture improvement		-
GM acceptance improved		In Europe, when compared to 10/15 years ago
GM for health benefits		-
GM potential tangible benefit		-
GM-benefit link mitigates protest		When the use of GM is transparent, and it conveys a clear immediate benefit to the consumer, protest is much less
Health benefits increasing importance		Health benefits in food are seen as more important
Health/naturalness claims		
Heart health as a concern		In the US, Heart health is seen as a concern and messaging regarding improving heart health seems beneficial
High price barrier		-
Identifying benefits to use in messaging		-
Importance of (low) price		-
Importance of collaboration with convenience companies		Integrating plant-based meats in products already produced by companies in the convenience industry ('kant en klaar voedsel') could be an important way to increase consumption
Importance of collective industry support		Collective industry support, especially when trying to convey benefits to consumers, can be very important
Importance of protein messaging in marketing		Because of the protein hype, all messaging regarding protein is seen as beneficial

		To reduce the association of consumers between 'processing' and 'unhealthy' some amount of education needs to happen and companies need to be more transparent what they use processing for
Importance of transparency about processing		
Importance origin of ingredient differs per segment		
Increasing retailer interest in growing alternative protein sector		
Increased energy as a positive effect of fiber		
Industrial interest in meat imitators		
Industry making quick profits as reason for distrust in food industry		
Information should be directly accesible for those interested		
Ingredient focus outdated		Focusing on the ingredient is something of the past
Ingredient is relevant to a certain extent		In US, most people like to have some idea on what it is, but not to great extent. It differs per consumer segment
Ingredient list length as indicator for processed		
Ingredient restrictions		Retailers often pose ingredient restrictions on sellers (in NL)
Just being 'plant-based' adds no benefit		Just mentioning that a product is 'plantbased' in NL does not convey a direct tangible benefit
Knowledge regarding origin might convey benefits		Could be useful to build associations with the mycoprotein category, as that may convey some benefits
Lack of industrial long-term vision		
Lack of ingredient knowledge can be beneficial		In the sense that you can fully explain what it is to consumers / resellers and they have no previous negative associations
Lack of public knowledge ridiculed as reason for consumer distrust in industry		
Lack of term marketing (mycoprotein)		Maybe the term mycoprotein is not as well known because companies don't actively market with that term
Lack of transparency as reason for consumer distrust in industry		
Lack of transparency big companies as reason for GM skepticism		
Less focus on vegan/vegetarian term		Because these could deter 'meat eaters'

Limited appeal of blended products		
Limited term awareness (mycoprotein)		
Lower focus on similarity to meat in branding		
Lower quality to reach price		Quality is often reduced to reach a price that is desired by resellers; however, that leads to a reduction in repeat purchases with consumers
Lowering price blended meat does not convince rejectors		When explicitly communicating blended meat
Make story an experience		
Market expansion requires change in communication		To attract the early majority, instead of just the early adopters
Market stagnation		Of current plant-based meats
Market to non-neophobic people		
Marketing as something new		
Meat imitation strategy challenges		
Mental health rising		Mental health is rising as a factor in decision making regarding plant-based meats
Minimal ingredients and processing preferable		
Minimizing consumer effort		
Minimum level of taste required		Consumers want a product that has a high quality and tastes good, while supermarkets want the product to be cheap and focus on low salt/fat/etc.
Mismatch in consumer and retailer needs between markets		
Mismatch retailer demands and market needs		
More GM is on the EU market		
Natural colorants can be preferential		
Naturalness concern		Some people are concerned with (lack of) naturalness of plant-based products
Negative effect of protein hype		
Negative influence of social media is a challenge communication sciences		
Neophobia as reason for distrust in food industry		
Neophobia because of unfamiliarity or bad experience		

New thought scheme not needed		Existing customer associations can be used to market a new product, not needing to form completely new associations
NGO protest larger than with consumers		Regarding GMOs
No resistance from children		
Nomenclature appeal differs per segment		
Nomenclature as differentiator from different categories		Certain nomenclature can be used to make a distinction between different categories
Nomenclature research for general positive/negative understanding		
Not eating meat normalized		
Nuance in communicating to not raise questions		Overcommunication might lead to unnecessary questions
Nutrition value not important for (dutch) majority		
Opinion on food products are relatively static		
Original substitutes		Tofu/beans/tempeh/falafel
Overcommunicating detrimental		Overcommunicating use of plant-based
Patenting as reason for consumer distrust in industry		Aggressive corporate patenting and protecting of patents, leads consumers to think these companies only care about profit
Perception of mycoprotein as plant-based		
Politicalization of the category		
Positive associations with protein		
Positive frame is not stigmatizing		Plant-forward' frame
Positive gut health effects of fiber		
Positive shift to targeted marketing		
Positive skin effects of fiber		
Potential for companies with convenience industry in their competencies		
Prevent negative associations		Like when soy was introduced with the hormone story
Price as main leverage on important aspects		
Price driver		
Processing to make products healthier		
Processing as money-maker for food industry		

		Not all consumers use the same indicators to verify whether a product is processed. Most often, the names on the ingredient list and how long the ingredient list is are main indicators
Processing definition disagreement		
Protein as tangible benefit		
Protein consumption is too high		
Protein framing		
Protein hype changed behaviour		Relatively quickly
Protein popularity		
Quality and taste as primary purchase drivers		
		(in NL) quality of the product (taste) is more important than how many ingredients are used (processing)
Quality over ingredient types		
Quick-profit driven companies misuse technology		
Recognisable as important product quality		
Relevance of information to consumers misunderstood by industry		
Repeat purchases low because quality is lacking		
Research on terminology useful		
Retailer demands are high		
Retailer imposing customer demography		
Retailer wish for less additives, more protein and fiber		
Retailer wishes as restriction		
Rising interest in fiber and gut health		
		In terminology; example of mycoprotein marketing as 'mushroom root', consumers feel deceived
Risk of consumer misinterpretation		
Risk of social media coverage regarding GM		Influencers discouraging use for instance
Role of social media in distrust in industry and GM		
Scientific language as indicator for processed		
Shelfing vision can increase alternative protein sale		
Shift from vegetarian/vegan to flexitarian		
Shift in targeted communication		
Shift to positive framing		
Simplified consumer perspective		

Social pressure as barrier		
Specific nutrient benefit framing difficult		Because it's often not widely known or supported yet that a specific nutrient conveys a benefit.
Stagnation in vegetarianism		
Story is important		
Story to consumers lacking		In meat imitators
Subtle communication aiding blended-meat usage		
Sustainability and climate change as drivers for early adopters		
Tangible benefits essential for consumer adoption		
Target market broadening as reason for decreased focus on sustainability		
Taste and texture are limiting people including it in routine		
Taste as a challenging barrier		
Taste messaging		Is becoming more important
Technological advancements blended meats		
Technological advancements meat analogues		
Technological advancements regarding healthiness		
Technology barrier for mycoprotein		
Technology development stalled		
Terminology differentiation from other categories		
Texture barrier		
Too much protein is not right		People are already eating too much protein
Trade-off between quality and goals		
Transparency as risk insurance rather than benefit		
Transparency GM is good		
Trust in technology should be application dependent		With the example of processing, it just depends on what companies choose to do with the technology
Turning perception into reality		
Ultra-processed foods are often unhealthy		Which is often true, because they contain a lot of sugar/fat/etc. But they are not always unhealthy purely because of processing
Uncertainty about terminology mycoprotein in US market		The term has not been extensively researched yet
Usage of protein claims has increased		
Using associations to connect to already existing opinions		

Value proposition as a barrier		
--------------------------------	--	--