# PLANT-BASED MEAT ALTERNATIVES SOLD IN AUSTRALIA:
AN ANALYSIS OF PRODUCT LABELS

The **plant-based meat alternatives category** in Australia has grown to include a wide variety of products available in grocery chains nationwide. An increasing number of these products are made domestically, **presenting new opportunities for Australian grain, legume and vegetable growers** to sell into this emerging value-adding supply chain.

As the product labelling of plant-based meat alternatives is the subject of a recent Senate Inquiry, **this quantitative analysis seeks to provide data on how products are labelled across the entire category** as of July 2021. This analysis excludes traditional plant protein products such as lentil burgers and falafel.

Food Frontier, as an independent think tank, advocates for an evidence-based approach to policy decisions, and affirms that simple, clear and concise front-of-pack information is important to **inform consumers about these products.**

252 PLANT-BASED MEAT ALTERNATIVE[A] PRODUCTS REVIEWED[1]

Product formats[B] in the plant-based meat alternatives category

- Snacking/party food — 6.3%
- Nuggets/schnitzels/tenders/burgers/etc. (crumbed) — 19%
- Mince — 6.7%
- Ready meals — 17.8%
- Chunks/strips/fillets (uncrumbed) — 10.3%
- Burgers (uncrumbed) — 11.5%
- Sausages — 15.5%
- Other product formats (each constituting <4% category, respectively) — 12.6%
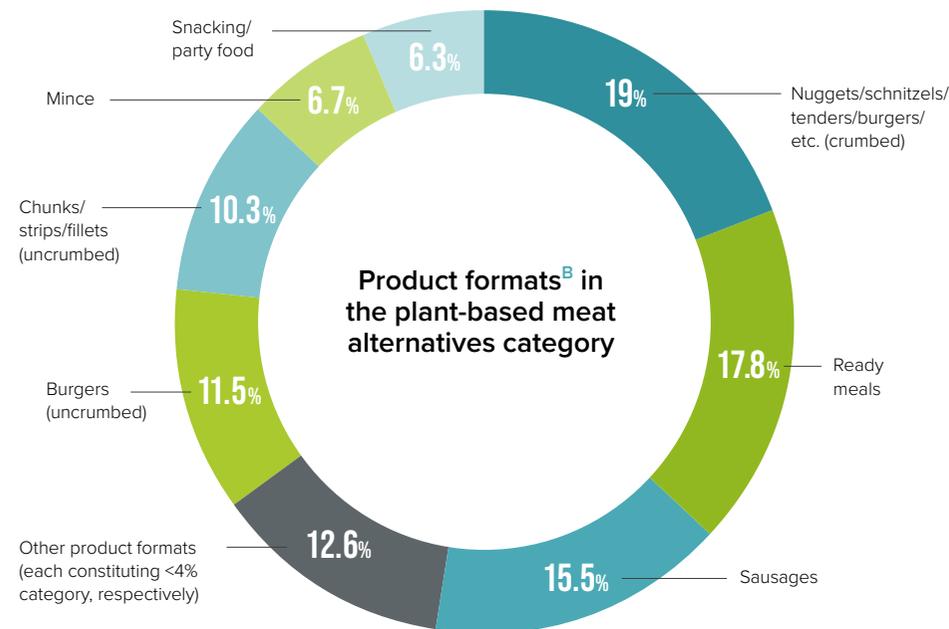
Example terms[C] to indicate product is meat-free[D]
Size of terms reflects frequency of use in product names[E] across 252 products

MEATLESS · CHICKENLESS · VEGIE · VEGETARIAN · FISH-STYLE · BEEF-STYLE · CHICK-FREE · CHICKEN-FREE · BEEFLESS · CRABLESS · BEEFY · NO MEAT · PEA-BASED · FISHLESS · MOCK · FISH-FREE · VEGAN · BEEF-FREE · CHICK'N · PLANT-BASED · PEPPERONI-STYLE · PORK-FREE · CHICKEN-STYLE · PRAWN-STYLE · MEAT-FREE · HAM-STYLE · PORKLESS

Example front-of-pack label[F] for a plant-based meat alternative product

Tasty Plant Protein Co.
BEEF-FREE
PLANT BASED
PLANT-BASED BURGERS
Made from pea protein
4.0 HEALTH STAR RATING
Good source of fibre | Non GMO | Good source of protein
$6.00
Plant-based burgers 300g
$2.00 per 100g

Example of animal meat term[G] used to communicate product style[H] and modified[I] to indicate it is meat-free.

Term in product name to indicate it is meat-free.

Additional front-of-pack term to indicate it is meat-free.

ZERO
products in the category use "Australian" in the brand or product names.

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1 Labelling analysis of 252 plant-based meat alternative products sold in Australian national retailers (Aldi, Coles, IGA, Woolworths) as of 5 July 2021, completed by Food Frontier. Data is available for reference here

Use of qualifier terms

100% of products use **one or more terms** on the front-of-pack label to indicate they are meat-free.

85% of products use **two or more terms** on the front-of-pack label to indicate they are meat-free.

56% of products use **three or more terms** on the front-of-pack label to indicate they are meat-free.

Use of animal meat terms

66% of products **do not use an animal meat term** in the product name, and instead typically display terms that describe the products' format (e.g. 'burger', 'mince', 'tenders'), thus indicating their intended use.

26% of products **use an animal meat term in the product name that is modified to indicate they are meat-free** (e.g. 'beefy', 'chicken-less'), thus describing the products' style.

8% of products **use an unmodified animal meat term** in the product name (e.g. 'beef', 'chicken'), along with **an average of 2.4 terms either in the product name or elsewhere on the front-of-pack label that indicate they are meat-free.**

Use of animal depictions
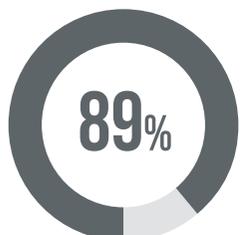
89% of products **do not use animal depictions** on the front-of-pack label.
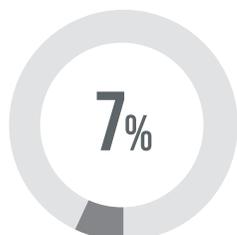
7% of products **use animal depictions occupying less than 10%** of the front-of-pack label.

4% of products **use animal depictions occupying more than 10% of the front-of-pack label.**

Key for Data Analysis

A - **Plant-based meat alternative:** Products that are made from combinations of plant proteins, oils, spices, seasonings and other plant derivatives, including starches and common food additives. Generally, these products use plant proteins (most often in the form of protein isolates, concentrates and flours) or mycoprotein (protein derived from fungi) as a base to achieve a more meat-like appearance and texture than traditional meat alternatives, such as lentil burgers.

B - **Product format:** Term describing a finished food product, such as 'burger', 'sausage', 'tender', 'slices', etc, which is more relevant to the process used to create a food than the origin of the food's ingredients.

C - **Terms:** A word or phrase used in a descriptive manner to communicate a product's ingredients, style or flavour. Includes modifications (see definition I below).

D - **Meat-free:** A product that does not contain animal meat.

E - **Product name:** The primary product title, which does not include the brand name and is the most visible portion of the name as it appears on a product label. Note: For a meat-free term to be considered part of the product name in this analysis, the term must have the same prominence as the product name (similar font size; of equal visibility to the product name). If a qualifier term was included near the product name, but in a smaller or significantly different font or style, leading to a lower prominence and visibility than product name, it cannot be counted as part of the product name and was included as a front-of-pack term.

F - **Front-of-pack label:** The area on the front of a product that lists the product name, along with other brand and marketing imagery and information.

G - **Animal meat term:** Refers exclusively to words: beef, chicken, duck, pork, fish, prawn, scallop, salmon; or variations on these words such as 'beefy,' 'chicken-style', which modify the term to indicate the product is meat-free. Does not include terms indicating the format of a food product, as per definition B above.

H - **Product style:** Term describing a product's flavour characteristics.

I - **Modification:** A modification on an animal meat term changes the meaning of the original term to indicate that the product is meat-free; for example, 'beefless', 'chick'n', 'pork-style', 'chickenie'.

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