Louvain School of Management

How are non-meat products represented in the product portfolios of major players in Belgian the food industry, and what economic and strategic factors could justify a diversification into these products?

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Declaration

During the preparation of this master's thesis, the author utilized ChatGPT for the following purpose:

1. To assist with the translation into English, to summarise academic literature more clearly, and to help verify and improve the clarity and structure of my writing.

2. After using ChatGPT, the author diligently reviewed and edited the content produced by the tool. We take full responsibility for the final content presented in this thesis. By signing this declaration, we affirm that the content of this master's thesis reflects our original work, augmented by the responsible use of AI.

Supervisor's name: Régis Coeurderoy

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Introduction

Animal agriculture is responsible for up to 57% of food-related greenhouse gas emissions globally, despite providing only 18% of calories and 37% of protein consumed by humans (Poore & Nemecek, 2018). This disproportionate environmental impact, coupled with growing concerns about animal welfare and biodiversity loss, underscores the urgent need to rethink the role of meat in our food systems.

Driven by a personal commitment to environmental sustainability and the ethical treatment of animals, I chose to focus this thesis on the diversification strategies of meat-processing companies in the Belgian ready-meals sector. My aim is to understand how large players in the industry are adapting their product portfolios to include non-meat alternatives, and what economic or strategic factors are driving or hindering this transition.

This topic is both timely and relevant. As consumer expectations shift and planetary boundaries tighten, the meat industry finds itself at a crossroads. Studying how key Belgian actors respond to these changes offers a lens into broader transformations within the food industry and helps identify levers for accelerating the plant-based transition.

Methodologically, the research adopts a mixed approach. It draws on strategic analysis of company reports and sustainability initiatives, combined with insights from a consumer questionnaire conducted as part of the study. The analysis highlights both the drivers and the barriers to plant-based diversification, and it offers the formulation of a growth strategy rooted in the concept of causal ambiguity, aimed at guiding companies through a phased transformation. This approach sheds light on how firms can manage uncertainty, align their resources, and build a coherent narrative around their transition.

Several challenges emerged throughout the research. Obtaining detailed and comparable data across firms proved difficult. Furthermore, consumer attitudes towards non-meat meals are shaped by a complex set of different factors such as cultural, psychological, and economic factors that are not always easy to quantify. Nonetheless, the findings reveal important insights into both the barriers and opportunities that define the future of meat alternatives in Belgium.

Part 1: Description of the sector and industry

1.1 A key economic sector rooted in animal production

The agri-food sector specialising in meat production is one of most important pillars of the Belgian economy, encompassing the entire value chain from livestock farming to processing and distribution. The main sectors concerned in this sector are beef, pork and poultry.

According to Euromeatnews, in 2024, Belgium recorded a production of 809,000 cattle, an increase of 5% compared to 2023. 310.5 million poultry slaughtered, the biggest amount since 2008. This represents around 67,000 cattle, 800,000 pigs and 26 million poultry produced every month in Belgium. However, in terms of total meat weight, pork dominates with 945 million kilos, which represents 54% of the total, compared to 31% for poultry and 14% for beef (Euromeatnews, 2025). The economic importance of pork in Belgium is accompanied by significant environmental challenges linked to intensive farming.

1.2 Evolving meat consumption patterns

On the consumption side, according to the Belgian statistics office Statbel, apparent annual meat consumption per capita fell below 80 kg, mainly due to the decline in the consumption of pork. This decline is explained by a fall in net production, which was not totally offset by the increase in imports. At the same time, poultry consumption is increasing by around 3% every year, probably due to its moderate environmental impact and price (Statbel, 2024).

1.3 Pressures on the sector and paths of adaptation

Then, companies in this sector are facing various pressures, such as soaring energy costs, pressure on profitability and labour shortages (Fevia, 2025). To manage these pressures, they are trying to adapt their business. Some are diversifying their offerings with vegetarian, vegan or hybrid products, while others are investing in more sustainable farming practices and technological innovations such as the "Meat the Challenge" project, which encourages innovation in the sector (Fevia, 2017). The search for a more resilient and responsible model is becoming central, through sustainability, transparency and innovation.

1.4 Changing eating behaviours and rising interest in alternatives

Finally, Belgian eating habits are also undergoing significant changes in recent years, particularly regarding meat consumption. These changes reflect both a greater awareness of environmental and ethical issues and a shift in consumer preferences.

According to a study conducted by iVOX in 2022, around a third of Belgians eat a vegetarian meal at least once a week, while the proportion of vegetarians/vegans has risen from 5% in 2020 to 8% in 2022. The flexitarian profile is growing rapidly, reaching 28% in 2022, particularly among young people and women. Two-thirds of Belgians already consume meat substitutes, and 43% have reduced their red meat consumption in two years. Among the products consumed, processed plant-based alternatives such as nuggets and burgers are the most popular, ahead of simple plant-based proteins and vegetarian or vegan cold cuts. Around 60% of consumers of these products use them as a substitute for meat, while 40% consume them as a supplement. The outlook is generally favourable for growth in plant-based consumption. 69% of respondents say they want to maintain their current consumption, while 20% want to increase it. Only 11% plan to reduce their consumption, a trend that is not very pronounced and mainly observed among those over 35 years old.

These social, economic and environmental changes demonstrate an uncertain but dynamic future for the sector, where the transition to less meat-based products could become a key strategic lever.

Part 2: Analysis of the various players in the industry

2.1 The rise and challenges of processed food

Over the last few decades, processed food has experienced rapid growth, becoming an essential part of the food supply in industrialised countries. While this model responds to the challenges of urbanisation, fast-paced lifestyles and large-scale food logistics, it is also the subject of debate. A study published in The Lancet Regional Health offers a nuanced view. Some processed products pose proven health risks, while others do not present any major danger. The industry, for its part, defends the benefits of processing. In Belgium, the food industry federation Fevia highlights the practical advantages offered by processed foods, it can be time savings, it is easily accessible and it reduces food waste by having a longer shelf life.

However, this trend raises crucial questions about sustainability. On a global scale, feeding a growing population means optimising food processing while reducing its ecological footprint. According to the NOVA1 classification, which divides foods into four groups, from unprocessed foods to ultra-processed foods, ultra-processed foods (UPFs) include products containing substances rarely used in home cooking, such as colourings, artificial flavourings, preservatives and refined sugars. In Belgium, these products account for nearly 70% of the range offered in supermarkets (Trendstop, January 2025, p.53). Globally, the turnover generated by UPFs has doubled in 30 years, from $570 billion to $1.1 trillion (Wood, 2023).

Ready meals are therefore set to remain part of our eating habits. The challenge is not to eliminate them, but to adapt them. It is becoming essential to consider environmental constraints, new economic imperatives and changing consumer expectations in order to meet the challenges of the 21st century in the sector of the UPFs.

2.2 Company selection and strategic interest

It is in this context that this thesis provides an in-depth analysis of three Belgian companies in the agri-food sector: What's Cooking? (formerly Ter Beke), Imperial Meat Products, and Westvlees. These companies are all among the ten largest meat processors operating in Belgium, according to the sector ranking established by Trendstop in 2025.

Firstly, the decision to include Westvlees, a company focusing exclusively on pork production, provides an opportunity to study the position of a company with little commitment to the plant-based transition. It serves as an essential point of comparison for assessing the influence of specialisation, industrial structure and strategic trade-offs on resistance to change.

Next, What's Cooking? and Imperial Meat Products were selected for their multi-brand structure, which offers a particularly rich field of analysis. These companies have developed differentiated strategies for their various brands, whether through reformulations, the launch of plant-based ranges or specific marketing campaigns.

Finally, these last two groups are also interesting because they have stated very different ambitions in terms of sustainability. Their inclusion in the study therefore makes it possible to assess whether these commitments are reflected in their product portfolios and how they relate to economic, competitive or societal considerations. This panel of companies thus combines strategic diversity, complementary profiles and sectoral relevance, while maintaining geographical and industrial consistency centred on Belgium.

2.3 First player: What's cooking?

2.3.1 A diversified historical actor turning to ready meals

The first player analysed is What’s Cooking?, the new name of the Ter Beke company since 2023. Founded in 1948, this company has established itself as a key player in the Belgian agri-food sector, initially through the production of charcuterie, before gradually expanding its portfolio to include ready meals. In 1996, Ter Beke signalled its desire to diversify with the acquisition of Pronto, a pizza specialist, and, more importantly, the Come a casa brand, which became the group's flagship brand. The purchase of Vamos, a producer of fresh lasagne, confirmed this direction (What's Cooking?, 2024).

2.3.2 Strategic shift and focus on sustainability

In 2025, the company announced in a press release that it was further strengthening its position with the acquisition of the French company Sveltic, which is active in fresh and frozen ready meals (What's Cooking?, 2025).

Today, What's Cooking? is present in 26 countries but remains strongly rooted in Belgium, which accounted for around 45% of its turnover in 2019. Five production sites are still active there, two of which were historically dedicated to charcuterie (2024 annual report What's Cooking?). Until the end of 2024, the company's portfolio was structured around two Strategic Business Units (SBUs). *Savoury,* focused on charcuterie, and *Ready Meals,* dedicated to ready meals. However, the sale of the Savoury division marked a major strategic turning point. At the end of 2024, the company decided to refocus all its resources on ready meals, which are perceived as more in line with contemporary expectations in terms of sustainability (2024 annual report What's Cooking?).

This refocusing is reflected in the current product portfolio. The Ready Meals SBU now includes the Come a casa and Vamos brands and, since 2025, Sveltic. Come a casa remains the flagship brand in Belgium, with a range of 17 ready meals, including nine lasagnas (mainly meat-based), seven pasta dishes and one pizza (Come a casa, 2025). In response to new eating habits, the range has been expanded to include 3 vegetarian dishes, 1 fish dish and 1 plant-based dish launched between 2023 and 2024 (Come a casa, 2025). This diversification reflects the group's intention to integrate more sustainable products into its range, while retaining the recipes that have made it successful.

The Vamos brand remains more discreet but strategic, offering mainly two meat-based lasagnas, a vegetarian version and a fish version (Vamos, 2025). As for Sveltic, its acquisition in 2025 marks a clear desire to export the group's know-how to other markets, while consolidating its expertise in ready meals.

Before its sale, the Savoury division was a significant part of What's Cooking?'s turnover, accounting for €464 million out of a total of €832 million in 2023 (2024 annual report What's Cooking?). It included brands such as Pluma (classic charcuterie), Daniel Coopman (high-end artisan range) and L'Ardennais (traditional regional products such as Ardennes ham). Despite the economic importance of this division, the company has decided to divest itself of it. The new CEO Piet Sanders explicitly stated: "We want to accelerate the organic growth of What's Cooking? and distance ourselves from exclusively meat products" (2023 annual report What's Cooking?). This decision marks a strategic withdrawal from processed meat and is part of a commitment to sustainability.

This strategic repositioning is also reflected in the financial data. Turnover rose from €399.7 million in 2014 to €728.1 million in 2019, representing growth of more than 80% (2024 annual report What's Cooking?). However, at the time, the company was focusing more on industrial efficiency and geographical expansion than on food diversification. Although the company was beginning to integrate certain environmental considerations into its production processes (logistics, packaging, energy), there was still no clear strategy to reduce the meat content in its finished products. It’s in 2023 that the first hybrid, vegetarian and plant-based products were promoted as a strategic focus (2023 annual report, What’s Cooking?).

2.3.3 From meat dominance to plant-based ambition

Then, the shift from Ter Beke to What's Cooking? symbolised this strategic revolution. The slogan "Yes We Care", now central to the brand, was created and is based on three pillars (What's Cooking?, 2025):

Good Food for All: developing a range of healthy, accessible products tailored to new diets. This includes mixed, vegetarian and plant-based dishes to satisfy all consumers while reducing environmental impact.

Protect Our Planet: adopting a strategy aligned with the Paris Agreement by reducing food waste and investing in renewable energy, sustainable packaging and responsible sourcing.

Help People Flourish: creating a safe, stimulating and inclusive work environment where employees can thrive professionally.

This new direction marks a clear break with the previous strategy. Until 2019, the company focused mainly on geographical expansion and industrial efficiency, with no real desire to transform its product portfolio in depth like nowadays. In 2023, the group launched its first 100% plant-based lasagne under the Come a casa brand (Come a casa, 2024). This is accompanied by the development of other hybrid and vegetarian recipes, with the aim of ensuring that 15% of products sold are vegetarian or plant-based by 2030 (Sustainability report 2024 What's Cooking?, p.65). Although this threshold may seem modest, it nevertheless represents a significant change from the situation prior to 2023, when no comparable data was available. This strategic repositioning is made in response to growing societal demand for food that is more respectful of the environment and animal welfare. In its 2024 sustainability report, What's Cooking? states: ″We want to be part of the solution for healthier and more sustainable food. That's why we are expanding our range of vegetarian, plant-based and hybrid dishes." (Sustainability report 2024 What's Cooking?, p. 58).

The company is also investing heavily in research to improve the texture, taste and accessibility of these new products, while building partnerships with start-ups and research centres to remain at the forefront of innovation. Although these non-meat products still account for a minority of current sales, the structure put in place suggests a long-term transformation of What’s Cooking?’s business model towards more sustainable food, which could give it a competitive advantage in the near future.

2.4 Second player: Westvlees

In order to complete the analysis of the transformation dynamics in the Belgian agri-food sector, it seemed relevant to include a player representative of a production model focused exclusively on meat. This choice helps to identify the possible limitations or resistance to change among companies that have not committed to diversifying their offer. Westvlees, one of Belgium's largest pork producers, was selected for its clear positioning within the traditional meat sector.

2.4.1 A traditional model focused on pork

Westvlees is a Belgian company founded in 1964 and based in West Flanders. Specialising in pork processing, it now occupies a central position in the Belgian pork sector. Its activities cover the entire value chain from slaughtering to the packaging of meat (Westvlees, 2025). It is part of the Belgian Pork Group, an entity created in 2015 by the merger of several companies in the Belgian pork sector. This group aims to strengthen the sector's competitiveness by promoting an integrated, sustainable and export-oriented production model (Fevia, 2023).

Between 2019 and 2024, Westvlees saw its turnover increase from €350 million to €750 million (Westvlees, 2025). However, this growth is mainly due to higher pork prices on international markets, rather than an increase in sales volumes or a major strategic change (Le Sillon Belge, 2024). According to Westvlees, annual slaughter volumes remain relatively stable, with around 1.5 million pigs slaughtered each year, confirming stable or even slightly declining domestic demand, in line with consumption trends in Belgium.

The company now generates more than 60% of its turnover from exports, mainly to Western Europe, but also to Asian markets such as China and Japan (Fevia, 2023). This positioning enables it to partially offset the structural decline in domestic demand. Unlike companies such as What's Cooking?, Westvlees has not yet shown any clear desire to diversify into vegetarian or hybrid products. Its positioning remains exclusively focused on pork, making it a more traditional player in the sector.

Westvlees' current strategy is based on three main pillars. Health and safety, with certifications such as BRC and IFS. Industrial efficiency, optimised for mass production without developing brands for the public. And finally, conquering demanding international markets such as Germany, Japan and China (Westvlees, 2025).

2.4.2 Operational innovation without diversification

Although the company is not actively pursuing a transition to alternative products, it has nevertheless launched several initiatives to be more environmentally friendly. These mainly concern water, energy and animal welfare.

Firstly, the company recycles up to 50% of the water used at its production site with its new water treatment plant. The treated water is reused internally or redistributed locally, for example to a nearby tomato greenhouse. The stated goal is to halve water consumption by 2025 (Fevia, 2023).

In addition, Westvlees has invested in more sustainable energy infrastructure, including the installation of 6,000 m² of photovoltaic panels and three cogeneration units that simultaneously produce electricity and heat. The company is also a signatory to the Belgian Food Sector Carbon Agreement, reflecting its commitment to reducing its carbon footprint without changing its pork-focused production model (Fevia, 2023).

Finally, in 2023, Westvlees launched the "Taste & Welfare" programme at its Westrozebeke site. This innovative system uses artificial intelligence to continuously monitor slaughter conditions via a video surveillance system. The aim is to quickly detect and correct any signs of animal stress. This project is being carried out in collaboration with Deloitte and is accompanied by BePork certification, which guarantees compliance with high animal welfare standards (Westvlees, 2023).

Despite these notable operational efforts, the company has not yet shown any clear desire to move towards a more diversified or less meat-based production strategy. This position contrasts with that of some players in the Belgian agri-food sector, who are committed to a more marked transition towards sustainable food models.

2.5 Third player: Imperial Meat Products

Founded in 1953, Imperial Meat Products began its activities with the artisanal production of smoked salamis. The company quickly distinguished itself on the Belgian market with the launch of the first Ardennes sausage under the Marcassou brand, which would become one of the emblems of Belgian charcuterie. Over the years, Imperial has developed a portfolio of strong brands including Aoste, Justin Bridou, Imperial, Leielander and Marcassou, each occupying a specific position in the Belgian and European markets (Imperial Meat Products, 2025).

For several years, the company has been part of the Mexican group Sigma Alimentos, a world leader in meat processing in North America, Mexico and Central America (Sigma Alimentos, 2025). This affiliation strengthens Imperial's international dimension, while maintaining a strong local presence in Belgium.

In 2021, What's Cooking? announced its intention to acquire Imperial in order to strengthen its position in the Belgian market and accelerate its transition to plant-based products. An agreement was reached, but the deal was blocked in 2023 by the Belgian and Dutch competition authorities on the grounds that it would have led to excessive concentration in the ready-made meals and charcuterie sector (Neerman, 2023). This refusal illustrates both Imperial's strategic weight in the Belgian market and the competitive challenges associated with consolidation in the sector.

2.5.1 Multi-brand strategy and plant-based evolution

Imperial now owns several strategic brands. The main one is Aoste which was initially focused on charcuterie, the brand pioneered the introduction of vegetarian alternatives in 2017. Its plant-based range has expanded to include around 11 products (plant-based slices, burgers, meatballs and spreads), although this offering has recently been streamlined to around five products, as the vegetarian burgers and nuggets failed to find their target market when they were launched in 2019 (Aoste, 2025). At the same time, Aoste is investing heavily in the development of hybrid meats, which represent a new generation of products combining meat and plant-based ingredients, such as vegetables or plant proteins (soya, peas, etc.). These hybrid meats make it possible to reduce the proportion of meat while retaining the taste that the consumers are looking for (Aoste, 2025). One example is Aoste Plus Disney sausages, made from chicken meat enriched with 27% vegetables. The brand is thus affirming its ambition to build an innovative offering that meets growing demand for more balanced and sustainable products without completely breaking with existing eating habits. These innovations reflect a strategic shift to capture customers who are keen to reduce their meat consumption without completely giving up meat products. A second brand is Marcassou, specialising in traditional Belgian charcuterie, this brand remains exclusively meat based. However, it is demonstrating increased environmental awareness, since 2020, its packaging contains 65% less plastic, avoiding 9 tonnes of plastic waste per year (Marcassou, 2025). A third brand is Justin Bridou known for its 100% meat sausages and snacks, this brand has not yet diversified into plant-based products (Justin Bridou, 2025).

The last brand is Imperial, which is historically specialised in hams and salamis. In 2021 it launched the Vegalia range, a 100% plant-based line comprising around nine products, from vegetarian slices and spreads to vegan meatballs. This launch marks a major step in the development of a plant-based offering, distinct from the brand's traditional products. It embodies the group's "0-50-100" strategy, which will be detailed below (Imperial, 2025).

2.5.2 A clear transition strategy

In 2020, Imperial formalised its strategic transition around a clear "0-50-100" roadmap, which is clearly explained on its website and is based on three complementary pillars:

- 0% waste: reducing the environmental footprint, investing in renewable energy, combating raw material and water waste, and improving employee well-being.
- 50% better meat or plant-based alternatives: Imperial believes that consumers want to eat less meat or meat of better quality. In response, it is developing hybrid products with with about 30% of vegetables in these products.
- 100% transparency: a commitment to clear and comprehensive communication on ingredients, the origin of raw materials and manufacturing processes, and to maintaining an active dialogue with stakeholders.

This strategy is accompanied by an ambitious goal of generating 50% of their revenue from their vegetarian and vegan range by 2025 (Imperial Meat Products, 2020).

Internationally, Sigma Alimentos' 2024 report indicates that 5% of the 1,930 product launches that year were plant-based alternatives, representing around 100 innovations. This shows the gradual integration of plant-based products into the group's overall strategy.

Imperial Meat Products' vision can be summed up in a philosophy rooted in both tradition and innovation. The company prides itself on a history built around taste and quality, combining classic charcuterie products with innovations tailored to new societal expectations. It affirms its conviction that there will always be a place for tasty meat-based products, while viewing current developments as a strategic opportunity. This opportunity consists of developing hybrid products and plant-based alternatives and promoting local and responsible production.

The study of these three players thus raises the following question: in the current context, what are the main factors encouraging or hindering diversification towards a plant-based offering in the agri-food sector?

Part 3: Factors driving this diversification

Following the strategies observed among the three players analysed, which illustrate a gradual transition towards a more sustainable offering, this section is there to examine the various factors that have influenced or hindered this transformation in the Belgian food industry.

3.1 Environmental factor

The first lever identified is an environmental factor. Against a backdrop of climate change and increased pressure on natural resources, reducing the proportion of animal-based ingredients is gradually becoming a must for players in the sector.

One of the key concepts in assessing a company's environmental footprint is the distribution of emissions according to the three scopes defined by the Greenhouse Gas Protocol:

- Scope 1: direct emissions from the company's own facilities (fuels, industrial processes).
- Scope 2: indirect emissions related to energy consumption (electricity, heating).
- Scope 3: indirect emissions upstream and downstream, including sourcing, use of sold products, logistics and end-of-life products.

It is this last scope that is currently the focus of attention, particularly in the agri-food sector, where meat ingredients contribute disproportionately to the overall carbon footprint of products (Mesquita & Carvalho, 2023). The 2024 sustainability report from What's Cooking? explicitly acknowledges this: "Animal ingredients have the biggest impact on the carbon footprint of our products. In a lasagna, for example, more than 50% of emissions come from meat and more than 80% from all animal ingredients combined. To reduce our Scope 3 emissions, we focus on reducing the impact of meat as much as possible. We do this by using less meat in our products while keeping a great taste fitting in a varied balanced diet, or by fully or partially replacing meat with plant-based alternatives." (What's Cooking?, 2024 Sustainability Report, p.67).

This argument is supported by scientific literature. Animal products are responsible for 58% of food-related greenhouse gas emissions, while providing only 37% of the protein consumed worldwide (Poore & Nemecek, 2018). By way of comparison, the production of 100 grams of beef protein generates approximately 105 kg of CO_2e, compared to less than 1 kg for legumes (Poore & Nemecek, 2018).

Meat-based meals are on average 14 times more polluting than vegetarian meals and four times more than vegan meals. The Good Food Institute goes even further, claiming that plant-based meat substitutes would reduce GHG emissions by 79 to 99%.

Agricultural land use is also determining factor contributing to environmental pressure. Only 7% of land is used to grow crops for direct human consumption, compared to 28% for livestock farming for meat and dairy products, which provide only 18% of global calories (Ritchie & Roser, 2019). This inequality contributes directly to deforestation and biodiversity loss.

The example of beef illustrates the scale of this impact, one hectare dedicated to beef production feeds far fewer people than one hectare devoted to crops such as bananas, soybeans or legumes. For the same number of calories, the carbon footprint of beef is up to 40 times higher than that of a fruit such as bananas, even when transport is considered and the beef is produced locally (Ritchie & Roser, 2019).

Faced with this reality, companies have no choice but to adapt. Imperial Meat Products' "0–50–100" strategy confirms that the ecological transition is becoming a priority, even for companies with a long history in meat production. The installation of solar panels and the development of vegetarian and hybrid ranges demonstrate a commitment to reducing emissions linked to energy but also to the content of the products themselves (Imperial Meat Products, 2025). Even more conservative companies such as Westvlees, which focuses exclusively on pork, have taken certain environmental measures. In particular, the installation of 6,000 m² of solar panels and three cogeneration units now enables the company to produce a significant proportion of its electricity and heat independently, thereby significantly reducing its direct energy-related emissions (Fevia, 2023).

Environmental pressure is now a powerful driver of change in the sector. It is encouraging companies to diversify their portfolios to reduce their carbon footprint, preserve natural resources and anticipate growing regulatory and societal expectations. This factor has a structuring impact on the strategic choices of groups such as What's Cooking?, Imperial Meat Products and, to a lesser extent, Westvlees.

3.2 Economic factor

Beyond environmental considerations, diversification strategies towards plant-based products are also driven by tangible economic factors. Faced with increasing agricultural price volatility and pressure on margins (Roudart, 2022), many companies in the agri-food sector have realised that reducing meat in their recipes, or even replacing it completely, could be a major economic lever. Since the pandemic, consumer beef prices in the European Union have increased by 30%, pork by 42% and chicken by 35% (Delivanis, 2025).

Meat production has always been a particularly costly activity. Livestock farming requires significant resources such as agricultural land, water, energy and feed for the animals. Every fluctuation in the price of cereals or soya has a direct impact on the final cost of meat products, thereby squeezing processors' margins (Poore Nemecek, 2018). Conversely, plant-based alternatives rely on simpler and more stable raw materials such as peas, soybeans, gluten and legumes, whose variable costs are generally lower, especially as economies of scale will develop (Pinson, 2025).

Furthermore, the average cost of producing one kilogram of protein from beef or lamb is estimated at €33.72, compared to €12.31 for plant-based protein from legumes or cereals, for an equivalent volume (Azarkamand, 2019). This difference is a strong argument in favour of a transition to products that are less expensive to produce.

In addition, companies claim that profitability is higher when the amount of meat in products is reduced. At What's Cooking?, the 2024 sustainability report highlights that: "Reducing meat lowers material costs while improving margins". The reformulation of their iconic lasagne has resulted in an 18% reduction in ingredient costs and a three-point increase in operating margin (Sustainability report 2024 What's Cooking?).

Conversely, Westvlees continues to focus on industrial optimisation and economies of scale. However, this approach makes it more vulnerable to cost volatility, as when the surge in pig feed prices between 2022 and 2024 caused EBIT to fall from 2.4% to 0.9% (Fevia, 2024). This shows that, without diversification, exposure to economic risks remains higher.

These plant-based products also act as strategic buffers against a possible structural decline in meat consumption. In this context, they enable the business portfolio to be gradually adapted while maintaining a competitive and profitable position.

However, while plant-based products have clear economic potential in the medium and long term, certain limitations temper this argument in the immediate future. Firstly, although the cost difference between animal and plant proteins is significant in terms of equivalent volume, this is not yet reflected in consumer prices. An analysis of price data from major Belgian retail chains (Colruyt, Lidl, Delhaize) shows that plant-based products are often more expensive than their meat equivalents. For example, vegetarian nuggets at Lidl had an average price of €7.76/kg in 2024, compared to chicken nuggets, which were often available for less than €6/kg. Similarly, Come a casa vegetarian lasagne is sold at around €10/kg, which is significantly higher than the meat version (€7/kg), despite potentially lower production costs.

This difference can be explained by several structural factors, such as low production volumes, a less optimised plant-based supply chain, and a premium positioning strategy to attract environmentally or health-conscious consumers. Furthermore, as long as economies of scale are not achieved, the variable costs of plant-based products, although more stable, are not yet able to compete with those of mass-produced processed meat (Perrot, 2013).

Finally, as several distributors have pointed out, the lack of standardisation of plant-based recipes, the variability of textures and constant innovation make it difficult to rationalise costs, unlike traditional meat products, which have been mastered for decades.

Thus, while the transition to plant-based foods offers attractive economic prospects in the long term, it still requires high initial investment and does not immediately translate into lower costs or consumer prices. This reality requires companies to demonstrate financial resilience, strategic innovation and consumer education in order to consolidate the profitability of these new product ranges.

3.3 Human factor

Beyond environmental and economic considerations, a human factor can also be decisive in a company's strategic direction, this factor is a change in leadership. The arrival of a new CEO can be a real catalyst for transformation or, conversely, a brake on change (Ren, 2023). In the agri-food industry, where structures are often old and habits deeply ingrained, the ideas provided by a new leader can profoundly change a company's priorities, particularly in terms of sustainability.

The example of What's Cooking? clearly illustrates this dynamic. The appointment of Piet Sanders as CEO in 2021 marks a major strategic turning point (What's Cooking, 2025). With solid experience in the sector, Piet Sanders previously held senior positions at Puratos, a global player in food solutions (Le Soir, 2021). There, he led several sustainable innovation projects, developing expertise at the intersection of product portfolio restructuring and environmental impact reduction. His profile contrasted with that of his predecessor, Francis Kint, whose priority had been the group's geographical expansion, with no notable shift towards sustainability (Greenyard, 2024).

Upon taking office, Piet Sanders embarked on a major strategic redefinition. He first initiated a total rebranding of the company, which officially became What's Cooking? in 2023, with the explicit mission of responding to contemporary societal expectations. Under his leadership, the "Yes We Care" strategy outlined above was born (Van Driessche, 2023).

This new vision was translated into concrete and ambitious decisions, such as the sale of the charcuterie division (Savoury), which had historically been central to the business and was still highly profitable, in order to focus on ready meals, which were better aligned with sustainability objectives. The establishment of a sustainability committee at the highest level of governance, with direct involvement from the CEO, illustrating a personal commitment to the CSR strategy. And finally, the systematic integration of environmental criteria into product innovation (2022 Governance Report, What's Cooking?).

Under Piet Sanders' leadership, What's Cooking? has undergone a cultural transformation, moving from a production-oriented approach based on processed meat to a strategy of sustainable value creation through plant-based diversification, responsible innovation and control of its carbon footprint. This case demonstrates how a well-targeted change of direction can become a major strategic lever, capable of repositioning an entire company in a rapidly changing economic and societal environment.

3.4 Competition factor

An often overlooked but decisive factor in the slow transition to plant-based alternatives in the ready-made meals sector in Belgium is the low level of competition in the market. This sector has historically been dominated by two major groups, What's Cooking? and Imperial Meat Products, which account for a significant share of the market for cured meats, ready-made meals and charcuterie. This quasi-duopoly situation hinders innovation, slows down the introduction of new ranges and reduces the pressure needed to shift product portfolios towards greater sustainability.

The failure of What's Cooking?'s takeover of Imperial in 2023 illustrates the problematic concentration in the sector. The deal, initiated in 2021, aimed to create a national champion but was blocked by the Belgian Competition Authority. The investigation revealed that the merger would have created the country's leading producer of charcuterie, representing more than 45,000 tonnes sold annually with a turnover of €600 million (Neerman, 2023). Such a level of concentration would have further killed competition and strengthened the dominant position of the merged entity, particularly in the pre-packaged meat and ready-made meals markets.

This oligopolistic structure produces several effects. The first is a lack of incentive to innovate. With few threatening competitors, market leaders are not driven to transform their product ranges or invest heavily in plant-based products (Symeonidis, 1996). This also creates high barriers to entry for SMEs. Small players struggle to gain access to supermarket shelves and are forced to offer higher prices.

At What's Cooking?, the Come a Casa brand illustrates this issue. Between 2019 and 2022, the vegetarian range remained virtually unchanged. It’s only in 2023 that a 100% plant-based dish was introduced into the lasagne range, even though the company itself acknowledges in its sustainability report that more than 80% of the emissions from a ready meal come from animal-based ingredients. In the absence of external pressure, the company preferred to reformulate its existing products rather than launch an ambitious plant-based range.

The situation is similar at Imperial Meat Products. The Aoste brand, a pioneer in plant-based products in Belgium, offered up to 11 vegetarian products in 2017 (Aoste, 2025). In 2024, only three plant-based side dishes remain on the shelves. The "0-50-100" strategy promoted since 2020 is struggling to translate into visible action. The Vegalia brand, although 100% plant-based, suffers from a lack of marketing support and remains largely absent from stores. This gradual withdrawal reflects the absence of a stimulating competitive environment.

However, since 2024, the momentum seems to be changing. Major retailers, notably Colruyt and Delhaize, have strengthened their role as drivers of the plant-based transition through the development of their own brands. In January 2025, Colruyt launched Boni Plant, a plant-based extension of its Boni Selection brand. The retailer offers vegetarian nuggets that are cheaper than national brands but still slightly more expensive than traditional chicken nuggets (Colruyt Group, 2025). This pricing strategy makes the plant-based alternative more accessible, while forcing manufacturers to adapt.

Delhaize, for its part, is continuing to expand its range under the "Plant-Based" banner, with clear signage on the shelves and a target of 60% plant-based protein in its product range by 2030 (Delhaize, 2025).

These initiatives are transforming the market balance for several reasons. First, lower margins on private label products are forcing established groups to review their pricing policies. Second, retailers, which have become leaders in certain segments, can impose conditions, such as giving priority to plant-based products on their shelves or removing meat products that are considered as unsustainable. Finally, the responsible image of these retailers is attracting a growing audience, which is increasing competitive pressure on manufacturers. This context is now forcing established players to accelerate their diversification, or risk losing visibility, competitiveness and market share in the medium term.

3.5 Pressure factor

Among the societal factors influencing the strategies of agri-food companies, pressure from non-governmental organisations (NGOs) is playing an increasingly important role. In Belgium, GAIA (Global Action in the Interest of Animals) is undoubtedly the most emblematic player in this area. Long committed to defending animal welfare and denouncing intensive farming, the NGO runs targeted media campaigns aimed at raising awareness among citizens, distributors and manufacturers of the urgent need to rethink our production and consumption patterns (Gaia, 2025). Although these campaigns have no regulatory scope, their impact on public opinion and corporate image is real and can lead to concrete changes in strategic direction.

Imperial Meat Products was recognised by GAIA in 2020 for its commitment to animal welfare (Gaia, 2021). This recognition marked a turning point for the company, which immediately launched the Marcassou "Le Cochon Bien-être" label. This label guarantees more respectful farming conditions such as no castration without anaesthetic, increased living space and rigorous monitoring of slaughter conditions (Marcassou press release, 2021). The initiative illustrates the company's desire to meet consumers' ethical expectations while preserving its reputation.

GAIA's impact goes beyond the strict framework of businesses. It can also be seen in changes in Belgian household consumption patterns. According to a study conducted by GfK, foie gras consumption fell from 257,000 kg in 2017 to 229,000 kg in 2019, a decrease of 28 tonnes in two years (Gaia, 2020). The number of households buying foie gras fell from 703,000 to 623,000 over the same period. For Michel Vandenbosch, president of GAIA, this trend is directly linked to the NGO's awareness campaigns: "Our campaigns are bearing fruit. The purchase and consumption of foie gras are clearly declining”. Conversely, sales of "faux gras", a plant-based alternative developed by GAIA, rose from 200,000 in 2018 to 350,000 in 2019, reflecting growing interest in ethical substitutes during the festive season (Gaia, 2020).

These examples show that even without a binding legislative framework, NGOs can act as catalysts for change. Their influence comes from putting moral pressure on economic players, mobilising citizens and amplifying certain practices deemed problematic in the media. Faced with this pressure, companies are seeking to align themselves with societal expectations, by diversifying their product ranges, launching more ethical products and adopting recognised labels.

3.6 Socio-behavioral factor

Finally, changing consumer eating habits is undoubtedly one of the most decisive factors in the plant-based diversification of the agri-food industry. At the intersection of environmental, health, ethical and economic concerns, food is becoming a reflection of new societal expectations, but these trends are not expressed uniformly, nor always on a large enough scale to sustainably guide business strategies.

Recent surveys on flexitarianism in Belgium show a growing interest in plant-based products. According to the iVOX study, 44% of Belgians now consume plant-based alternatives to meat products. This behaviour is particularly prevalent among the people under 35 years old, the more affluent social groups and households with three or more people. Among the products consumed, processed alternatives (burgers, nuggets) are the most popular, far ahead of simple plant-based proteins (tofu, legumes). Around 60% of consumers say they use these products to replace meat, while 40% consume them as a supplement (iVOX, 2022).

The outlook for the future remains encouraging, with over 69% of respondents wanting to maintain their current plant-based consumption and up to 20% even wanting to increase it. Only 11% plan to reduce their consumption, a trend that is mainly concentrated among those over 35 years old. These figures demonstrate a real momentum, even if the shift towards a plant-based majority remains marginal.

This growing demand offers several opportunities for manufacturers. It allows them to capture new consumer segments, improve their image in terms of social responsibility, and experiment with more innovative ranges (vegetarian, vegan or hybrid products). It is in this context that a brand such as Aoste developed plant-based lines in 2017, and What's Cooking? added plant-based dishes to its Come a casa range in 2023.

However, this momentum remains tempered by several structural obstacles. Firstly, plant-based demand is still a minority in terms of volume. The vegetarian market is growing, but only accounts for a small percentage of total sales of ready meals. This limits the possibility of economies of scale and makes certain products more expensive to produce, which explains their high price positioning (Mordor Intelligence, 2025). For example, a vegetarian lasagne from Come a casa sells for around €12/kg, compared to €7/kg for the meat version, which may discourage some consumers from buying it (Come a casa, 2025).

Furthermore, stated behaviour does not always translate into purchasing behaviour. A form of dissonance between intention and practice persists, although consumers say they are open to plant-based alternatives, they remain attached to certain cultural markers (taste, texture, habit) associated with meat. This phenomenon partly explains the gradual withdrawal of certain vegetarian products from the Belgian market, as observed at Aoste and Come a casa.

Furthermore, the sociological profile of vegetarian consumers remains specific, with a high concentration in urban, educated and aware areas. This segmentation makes generalisation more complex, particularly in rural areas or among certain categories of the population that are less exposed to the promotion of these types of products (iVOX, 2024).

Despite this overall trend, the transition to a more plant-based diet is still marked by some resistance from consumers, particularly in the case of ready meals. A questionnaire conducted as part of this thesis[1] among more than 100 respondents reveals that only 28% of them would like to see more vegetarian or vegan ready meals on the shelves (see Appendix A Figure A7). Most participants are therefore indifferent or opposed to a wider availability of these products, illustrating a form of inertia in eating habits in this specific segment.

Furthermore, even if the taste and price were the same, more than 35% of the participants said they would not buy a vegetarian version of a dish normally containing meat, showing that the presence of meat remains a criterion of attachment, or even a cultural anchor, for a significant part of the population (see Appendix A Figure A10). These results show that while demand is evolving, it remains heterogeneous across products and slower in the processed food sector.

[1] See appendix for complete questionnaire results.

Part 4: Scenario for the evolution of the sector between now and 2035

4.1 Introduction to the prospective scenario

In view of the economic, environmental and societal dynamics analysed throughout this thesis, a key question arises: what path will the Belgian agri-food sector take in terms of plant-based diversification between now and 2035? While some pioneering companies such as What's Cooking? and Imperial Meat Products are beginning to partially transform their offerings, other more traditional players, such as Westvlees, remain rooted in a very productive model focused exclusively on meat.

In order to explore the prospects for change in this sector, a realistic and structured scenario has been built. This approach aims to compare the data collected, the trends observed, the weak market signals and the results of the field survey to build a coherent projection for 2035. It also lays the foundations for strategic thinking on the concrete levers that could accelerate, support or frame this transition in the years to come.

This scenario is neither utopian nor catastrophic. It is intended to be the most likely reflection of the sector's evolution, considering both the current incentives for plant-based diversification, the persistent barriers to its large-scale adoption, and the potential systemic transformations in the medium term (new regulations, the rise of private labels, changing consumer expectations, climate pressure, etc.). The section is divided into two parts. First, a detailed presentation of a central scenario based on a gradual but constrained evolution of the Belgian meat sector towards a more diversified and sustainable offer. This is followed by a prospective analysis of the levers that can be mobilised to adopt a growth strategy for non-meat products.

4.2 Growth in demand for ready meals

By 2035, overall consumption of ready meals in Belgium is expected to remain stable or even increase slightly. This assumption is based on several observations. On the one hand, 75% of respondents already consume at least one ready-made meal per week, on the other hand, the societal context, with longer working hours, the rise of single-parent and single-person households is likely to maintain or even reinforce this trend (see Appendix A Figure A7). According to a Mintel EMEA report on prepared meals in 2023, convenience remains the main selling point for this product category, resulting in moderate but steady growth. After an increase during the pandemic, growth is now stable and expected to continue. In addition, Fevia highlighted the benefits of ultra-processed foods, emphasising their efficiency such as being practical solutions, having a better preservation, reducing waste, and processes such as pasteurisation and fermentation that improve food safety, digestibility and availability. These arguments reinforce the continuing role of ready meals as a stable and strategic component of food consumption.

Given that the overall supply of ready meals is set to grow further, a second key assumption in this scenario concerns the evolution of the share of vegetarian and hybrid dishes in the overall supply of ready meals. By 2035, it is likely that the market share of vegetarian or hybrid ready meals will increase and be close to reach the share of ready meals with meat. This assumption is based on the observation of several structural and behavioural dynamics already underway, both at national and European level.

On the one hand, eating habits are slowly but steadily shifting towards greater flexibility. In neighbouring countries such as the Netherlands and France, the rise of flexitarianism has accelerated in recent years, with a growing proportion of the population saying they are reducing their meat consumption without eliminating it entirely (Proveg International, 2021). This trend is reflected in supermarkets in a visible diversification of the range on offer, particularly through private labels. In Belgium, major retailers are following this trend. The Colruyt group, for example, says it now offers more than 520 fresh vegetarian products on its shelves, a volume that has almost doubled in five years. Although not all of these are ready meals, this expansion demonstrates a growing commitment to a more diverse range, including ready-to-eat vegetarian dishes. Colruyt also claims that one in five customers already buys plant-based substitutes, revealing a potential consumer base that is likely to grow steadily between now and 2035 (Colruyt Group, 2024).

Added to this is the strategic positioning of several manufacturers. Imperial Meat Products, for example, has an explicit ambition to achieve 50% plant-based or hybrid volumes in the short term (Imperial Meat Products, 2025). Furthermore, the rapid development of own-brand plant-based products (such as Boni Plant at Colruyt and "Plant-Based" at Delhaize) is contributing to greater visibility and accessibility of meat-free products, significantly increasing the available range.

Thus, although meat dishes are expected to maintain a dominant position on the Belgian market in the medium term, significant growth in vegetarian or hybrid dishes is plausible.

4.3 A moderate decline in meat consumption

In addition, by 2035, the consumption of meat per capita in Belgium is expected to decline moderately. This assumption is based on both international projections for dietary transition and observations of slower national trends.

Globally, several scientific institutions are calling for a significant reduction in meat consumption to meet environmental and health objectives. The EAT-Lancet Commission report (Willett et al., 2019), for example, proposes a global reference diet compatible with human health and planetary boundaries, in which red meat consumption is limited to approximately 14 grams per day. For its part, the Food and Agriculture Organisation of the United Nations emphasises in its long-term scenarios the need to reduce the environmental footprint of the livestock sector, particularly due to its contributions to greenhouse gas emissions, deforestation and water resource depletion (FAO, 2021).

At the European level, several countries have already begun this transition. In France, per capita meat consumption fell by more than 10% between 2010 and 2020, according to data from FranceAgriMer published in 2022. Germany is seeing a similar trend, reinforced by the rise of vegetarianism and flexitarianism, particularly among younger generations (Statista, 2023). These developments suggest that a gradual reduction is achievable in Belgium through cultural diffusion and regulatory and commercial convergence with its neighbours.

However, Belgium stands out for its relative conservatism in terms of food. As the survey data shows, only 28% of respondents say they would like to see more vegetarian or vegan ready meals on the shelves (see Appendix A Figure A7), while 36% would not consider buying a vegetarian meal, even if it tasted the same and cost the same (see Appendix A Figure A10). Furthermore, 92% say they do not follow any particular diet, reflecting a general attachment to traditional habits, often centred on meat (see Appendix A Figure A2).

In this context, the expected decline in meat consumption in Belgium is not likely to be a sudden change, but rather a gradual evolution, driven by a growing fringe of consumers who are concerned about health, animal welfare or the environment. This would put moderate but real pressure on agri-food processing companies to diversify their portfolios and offer alternatives, while maintaining a significant meat offering.

4.4 The political and regulatory outlook

Then, by 2035, Belgium is likely to adopt a series of measures to encourage the transition to more sustainable diets, without resorting to direct taxation on meat. This assumption is based on the regulatory trajectory observed in Belgium in recent years, as well as on European guidelines on food sustainability.

At the national level, Belgium has historically been cautious about using behavioural taxation instruments. Debates on a possible sugar tax or a CO_2 pricing system for food products have never led to concrete implementation, partly due to opposition from the economic sectors concerned and the lack of political consensus (Federal Public Service Health, 2019). A meat tax, although mentioned several times in public debate, remains politically very sensitive today. It raises social issues (risk of penalising low-income households), economic issues (impact on the agri-food sector and livestock farming) and cultural issues (the symbolic place of meat in the Belgian diet).

However, more moderate incentives could be gradually introduced between now and 2035. These mechanisms could include, for example, reduced VAT on plant-based products, subsidies for research and innovation into plant-based alternatives, or the integration of environmental criteria into public procurement, particularly in collective catering. These instruments are already being discussed at European level as part of the Green Deal and the Farm to Fork Strategy, which calls on Member States to reorient their food systems towards greater sustainability (European Commission, 2020). The European Parliament has also come out in favour of harmonising food taxation according to the environmental impact of products, paving the way for differentiated VAT rates that favour plant-based alternatives.

The experience of some neighbouring countries may also shed light on this path. In Germany, debates have been ongoing since 2019 to increase the VAT rate on meat from 7% to 19%, but no concrete measures have been adopted to date due to political resistance like in Belgium. Conversely, some countries have preferred to act through incentive mechanisms, such as the Netherlands, which has invested heavily in public research programmes on plant proteins, while Denmark has implemented a national strategy to support vegetarian products in school and hospital catering (Ministerie van LNV, 2022).

Thus, although a radical tax reform such as a meat tax seems unlikely in the short to medium term in Belgium, a set of more gradual incentive measures could emerge. These actions would help accelerate the diversification of food offerings while limiting negative effects on the competitiveness of the sector. They would exert indirect pressure on companies to adapt their product ranges and integrate more ESG criteria into their product innovation strategies.

4.5 The growing power of private labels

Moreover, it is also highly likely that private label brands will play a central role in the structuring and development of the plant-based product offering in supermarkets. The assumption here is that private labels will heavily increase their offer of plant-based innovations sold on Belgian supermarket shelves. This trend is part of a broader shift towards more sustainable food products, driven largely by retailers themselves.

Several factors justify this projection. First, major retailers such as Colruyt and Delhaize have initiated a proactive transformation of their plant-based offerings. In March 2025, Colruyt Group launched a new dedicated brand, Boni Plan't, which includes more than 100 vegetarian and vegan products in various categories such as ready meals, snacks, plant-based milks and desserts. The objective is to make this offering more visible, easier to understand and, above all, more accessible in terms of price and taste. This strategy is clearly aligned with a desire to change eating habits. Colruyt aims to rebalance its protein range, with a target of 60% plant-based protein and 40% animal protein by 2030 (Colruyt Group, 2024). For its part, Delhaize has also doubled its national plant-based offering by 2025, focusing on its "Plant-Based" range. The Ahold Delhaize group, which includes the Belgian retailer, has set a strategic target of 50% of its protein sales coming from plant-based sources by 2030 across Europe (Ahold Delhaize, 2023).

This momentum in the development of plant-based private label products can be explained by several factors. First, retailers have direct leverage over their product range, enabling them to quickly implement new ranges in line with their environmental commitments or emerging demand. Secondly, by producing in larger quantities and controlling their value chain, they can offer plant-based products at competitive prices, thereby reducing a major barrier to consumption. Finally, they can influence consumer choices through marketing tools such as green labelling, cross-promotions and shelf layout.

This rise in plant-based private labels will have several structural effects. It will help normalise plant-based foods. It will increase pressure on traditional manufacturers, who will have to adapt their offerings or risk losing visibility and market share. Finally, it will enable a wider distribution of plant-based alternatives to consumers who are still hesitant, by guaranteeing accessibility, quality and attractive prices.

In short, distributors already play a strategic role in democratising plant-based products. Their central position in the value chain, their ability to influence consumption and their stated commitment to contributing to a sustainable food transition suggest that they will be the main drivers of plant-based innovation between now and 2035.

4.6 Cultural and psychological resistance

However, despite technological advances, the gradual diversification of plant-based offerings and the efforts made by retailers and manufacturers, it is likely that a significant proportion of the Belgian population will remain resistant to the widespread adoption of meat-free ready meals by 2035. This assumption is based on deep-rooted cultural, identity and psychological resistance, identified both in the empirical data of this thesis and in the scientific literature.

Several obstacles are clearly apparent. On the one hand, there is still mistrust of plant-based dishes, particularly regarding their degree of processing and composition. In the questionnaire conducted for this study, the second main reason to not buy plant-based substitutes is the mistrust of ingredients by 26%, behind the lack of habit with 36% (see Appendix A Figure A8). This fear is reinforced by the perception that plant-based products are artificial or ultra-processed, even when this is not objectively the case (Siegrist & Hartmann, 2019).

On the other hand, the attachment to meat as part of one's identity is a more profound barrier. Eating meat is often associated with traditional values, social practices and a certain view of masculinity. Several studies have highlighted this symbolic dimension of meat, which is perceived as a powerful, nourishing food that is essential to a balanced diet (Graça, 2015). This identity aspect limits the adoption of alternative diets, even when they are accessible or presented as healthier.

More generally, many individuals show resistance to dietary change, a phenomenon that is well documented in consumer psychology. According to a study by Hoek & al in 2011, eating habits are particularly rigid because they are rooted in routine, acquired preferences and the need for control in a complex environment. This behavioural inertia hinders the introduction of new products, even when their nutritional or environmental profile is superior.

The results of the questionnaire clearly illustrate this trend. Indeed, 36% of respondents said they would not buy a vegetarian ready meal, even if the taste and price were equivalent to a meat dish (see Appendix A Figure A10). This data reflects a principled refusal rather than a rational choice, confirming the persistence of deep-rooted cultural barriers. Furthermore, only 28% of respondents would like to see more vegetarian or vegan ready meals on the shelves, showing that active demand for these products remains limited to a minority.

Finally, more practical barriers also remain, such as a perceived lack of variety or a lack of culinary reference points, particularly for people who are not used to plant-based dishes. These factors reinforce the idea of a partial transition that will vary depending on the target audience. While a moderate majority would probably adopt a more diverse diet, a significant proportion of the population would remain loyal to a meat-based diet, particularly in certain age groups, socio-professional categories and regions.

Thus, despite the opportunities offered by plant-based alternatives, it is unlikely that the entire market will shift towards these new practices. In 2035, traditional meat-centric segments will remain strong, justifying a differentiated strategy on the part of agri-food companies.

Part 5: Identifying potential levers for action

Despite the emerging dynamics observed in the Belgian agri-food sector, the transition to a plant-based offering remains partial and uneven. For this transition to become structural and resilient by 2035, a set of complementary levers must be mobilised. The objective is to create the conditions for a broader shift by anticipating consumer expectations, reducing structural barriers and stimulating targeted innovation.

5.1 Achieve economies of scale through a strategy of early investment

One of the major challenges facing plant-based products is their price. According to the survey, 98% of respondents believe that a vegetarian or vegan ready meal should cost at least as little as its meat equivalent, if not less (see Appendix A Figure A9). This perception is problematic in a context where plant-based volumes remain low, making economies of scale difficult to achieve. In addition, several economic studies confirm that plant-based substitutes are still more expensive to produce than processed meat in immature markets (Clark et al., 2022).

Faced with this situation, companies must adopt a "strategic loss-making investment" approach, they must accept a reduced profitability in the short term in order to boost demand and gradually reduce unit costs. Such a model is already visible in certain sectors such as technology and organic food. By developing sufficient volumes and specialised supply chains (peas, European soy, fermentation), companies can hope to reach viable profitability thresholds by 2035 (Smetana et al., 2021).

5.2 Acting on behavioural and educational levers

The questionnaire results reveal that the main barriers to purchasing plant-based ready meals are not price (11%) or the environment (less than 10%), but psychological and behavioural factors such as lack of habit (33%), mistrust of ingredients (26%) and perceived inferior taste (16%) (see Appendix A Figure A8).

These data confirm a trend observed in several scientific studies, namely that resistance to plant-based diets is rooted more in identity and cultural factors than in purely rational considerations (Graça, 2015). To address this, it is essential to strengthen food education in schools, but also to invest in in-store education with a clear signage and product storytelling. Transparency about ingredients, manufacturing processes and the origin of raw materials also plays a fundamental role in building trust (Hoek et al., 2011).

5.3 Meeting consumers' real expectations

Then, the data collected in this study indicates that the main drivers for purchasing vegetarian dishes are health (55%), taste (35%) and, to a lesser extent, animal welfare (27%) (see Appendix A Figure A5). The environmental argument, often put forward by brands, ranks far behind. This discrepancy suggests that companies need to adapt their messaging. Indeed, a marketing strategy focused on nutritional quality, naturalness or local origin could be more effective than one based solely on environmental benefits.

This approach is confirmed by a study by Michel and Siegrist in 2016, which found that consumers are more accepting of plant-based substitutes when they are perceived as tasty and healthy rather than simply sustainable. The challenge is therefore not just to offer meat-free products, but desirable products with equivalent or even superior sensory and functional characteristics.

5.4 Supporting technological innovation in plant-based alternatives

Improving plant-based substitutes is a prerequisite for their widespread adoption. Significant progress has already been made, particularly through precision fermentation, high-moisture extrusion and the cultivation of mycoproteins (Bryant & Barnett, 2020). These innovations make it possible to approximate the sensory characteristics of meat products while optimising their nutritional value.

However, their widespread use remains difficult because of high costs and regulatory uncertainties, particularly in Europe. It would be appropriate to consider public support for applied research into these techniques, for example through public-private partnerships between universities, start-ups and manufacturers.

5.5 Promote incentive-based regulation aligned with European standards

Although this aspect has been developed in a previous hypothesis, it is essential to remember that political support remains necessary to accompany the transition. This does not mean introducing immediate coercive measures (such as a meat tax) but rather adopting targeted incentives such as reduced VAT on plant-based products, aid for reformulation, strengthened ESG criteria in public catering contracts, or co-financed information and awareness campaigns. Accelerating the transition to more plant-based ready meals cannot be limited to supply or regulation. We also need to transform demand, rebuild consumer confidence and align long-term economic incentives. A coordinated vision, mobilising industry, distributors, public authorities and civil society, will be essential if plant-based meals are to reach a critical mass by 2035.

5.6 The phenomenon of causal ambiguity

However, despite the identification of concrete levers, many companies are still hesitant to embark on an ambitious plant-based transformation. This hesitation is partly due to uncertainty about the links between the strategic actions to be implemented and the performance that can be achieved from these actions. Which lever should be activated first? In what order? At what scale?

This situation illustrates a well-known phenomenon in strategic management, the causal ambiguity. This concept, theorised by Lippman and Rumelt, refers to the fact that it is often difficult for companies to identify with certainty which specific resources or actions explain their success or failure (Lippman & Rumelt, 1982). In the context of this transition, this ambiguity complicates planning and slows down decision-making. The concept of causal ambiguity fits perfectly within the theoretical framework of the Resource-Based View (RBV), developed by Barney. According to this approach, companies' sustainable competitive advantages are based on the exploitation of internal resources that are scarce, difficult to imitate, non-substitutable and organised in such a way as to create value. Causal ambiguity refers specifically to the difficulty, for competitors but also sometimes for managers themselves, of identifying the cause-and-effect relationships between the resources used (skills, routines, processes) and the performance observed (Barney, 1995). In the context of the transition to plant-based products, this uncertainty is clear. Companies often do not know which combination of factors (product formulation, marketing, technological choices, etc.) generates the value perceived by consumers. This lack of transparency slows down strategic investment and explains why some companies are reluctant to commit fully. Reducing this ambiguity through some approach therefore not only provides a better understanding of effective levers, but also creates know-how that is difficult to copy, which is a real source of competitive advantage according to the RBV.

5.6.1 Step 1: Experimentation to reduce uncertainty

So, to overcome this inertia, a three-step approach for structuring a plant-based innovation strategy despite uncertainty is proposed. First, an experimental approach is needed. Testing vegetarian, hybrid or reformulated products on a small scale reduces risk, enables rapid learning and allows the offering to be adjusted based on market response.

This is precisely the path taken by What's Cooking? by gradually revising the recipe for its iconic lasagne to reduce the meat content while maintaining the taste quality (What's Cooking? 2024 annual report). For its part, Aoste, a brand of the Imperial group, introduced a range of vegetarian burgers in 2019, which was ultimately withdrawn from the market (Aoste, 2025). Although this attempt was not pursued, it illustrates a trial-and-error approach aimed at testing market appetite for a new segment without immediately committing significant structural resources.

This type of experimentation can also be seen among distributors, such as Colruyt, which launched the Boni Plant brand to test the acceptance of low-cost private label plant-based dishes (Colruyt Group, 2024). The aim is to validate recipes, formats and channels before potentially scaling up. Reducing ambiguity through experimentation is therefore a key strategic lever, enabling companies to build a robust plant-based strategy based on concrete results without compromising their economic stability.

5.6.2 Step 2: Mobilising internal resources

The second step is to mobilise the companies' own internal resources. Plant-based transformation strategies require the active mobilisation of companies' internal capabilities, particularly in terms of R&D, infrastructure and skills. Scientific research highlights that innovation in the food industry requires internal capacity building, often complemented by external collaborations to overcome the limitations of internal expertise (Gonera, 2022).

This step involves several levers. First, it is crucial to train teams in innovative approaches such as precision fermentation to improve the taste, texture and nutritional profile of plant-based alternatives (Henrekson, 2022). Next, existing infrastructure must be modified and adapted to accommodate new raw materials (peas, soybeans, etc.), which often requires investment in specific machinery or hygiene measures. Finally, establishing external partnerships with specialised players (start-ups, university laboratories, accelerators) provides access to cutting-edge technical expertise and accelerates innovation (Good Food Institute, 2024).

The Colruyt Group has clearly understood this dynamic and, through its private label Boni Plan't, is illustrating this approach. In 2025, the company launched nearly 100 plant-based products under its private label (Colruyt Group 2025). Behind this roll-out, we see the mobilisation of internal teams (R&D, quality, procurement) and investment in product range, packaging and signage, facilitating the structured integration of plant-based products into the range.

5.6.3 Step 3: Embedding continuous learning

The final stage of this strategy is to embed the transformation in a culture of continuous learning. In an uncertain and rapidly changing environment, it is crucial to document the concrete effects of each initiative, whether it is a new product, a recipe change or a communication campaign, in order to quickly adjust strategic directions. The literature on innovation management recommends an iterative and incremental approach in sectors where there is a high degree of ambiguity (O'Reilly & Tushman, 2016). This involves setting targeted KPIs such as the share of plant-based sales, repurchase rates and customer satisfaction, as well as collecting consumer feedback. This step is even more essential given that some past attempts, such as the introduction of vegetarian burgers by Aoste in 2019, did not meet with the expected success and were withdrawn from the market. However, if analysed carefully, this type of failure can nevertheless become a valuable source of knowledge for refining future strategic decisions.

5.7 Turning uncertainty into strategic opportunity

The three steps proposed follow a strategic escalation logic in a context of causal ambiguity (Lippman & Rumelt, 1982). Experimentation first reduces uncertainty without committing excessive resources. This is followed by internal mobilisation, which is essential to give substance to the first positive signals. Once these foundations have been laid, a strategic narrative can also amplify internal and external buy-in. Finally, the measurement stage ensures the model's viability over time and feeds into a cycle of continuous improvement. This progressive sequence responds to the need to act while securing the trajectory, to make plant growth a sustainable and controlled dynamic. This methodological framework offers a response to the complexity of change by articulating levers in a dynamic and sequenced manner. It transforms a situation of uncertainty into a strategic opportunity and provides a credible path for accelerating the transition to a more plant-based diet by 2035.

Conclusion

This thesis set out to examine how non-meat products are represented in the portfolios of major players in the Belgian food industry, and what economic and strategic factors support or hinder the transition towards plant-based alternatives. In a context marked by environmental urgency, evolving consumer behaviours, and regulatory shifts, the diversification of meat-based portfolios has become both a challenge and an opportunity.

The analysis of three major actors, namely What's Cooking?, Imperial Meat Products and Westvlees revealed contrasting strategies. While some have made structured and visible efforts to introduce plant-based or hybrid products, others remain cautious, prioritizing incremental changes over disruptive innovations. The economic rationale for diversification appears increasingly solid. In fact, plant-based products could offer better margins, lower input volatility, and strategic resilience. However, this potential is still undermined by structural barriers such as market concentration, supply chain complexity, or consumer resistance rooted in habits and identity.

Personally, I believe that the transition to a more plant-forward food system is not only a moral and environmental necessity but also a strategic imperative for businesses that seek long-term competitiveness. Relying solely on consumer-driven demand is no longer sufficient. Companies must be proactive, guided by innovation, transparency, and a clear sustainability narrative. This calls for a holistic transformation, not just of products, but of business models and mindsets.

Considering this, I proposed a step-by-step growth strategy rooted in the concept of causal ambiguity, offering a structured path to help companies overcome uncertainty. By starting with low-risk experimentation, mobilizing internal capabilities, building a coherent narrative, and continuously measuring impact, companies can gradually shift towards a resilient, future-proof portfolio.

Although this research had limitations such as accessing to internal business data, it provided a clear overview of the strategic dynamics and highlighted actionable levers. The coming decade will be decisive. If the Belgian food industry is to remain relevant in a changing world, accelerating the transition to plant-based prepared meals must become a shared priority, not just an initiative.

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Appendix

Appendix A: Results of the survey

Figure A1: Age of the participants

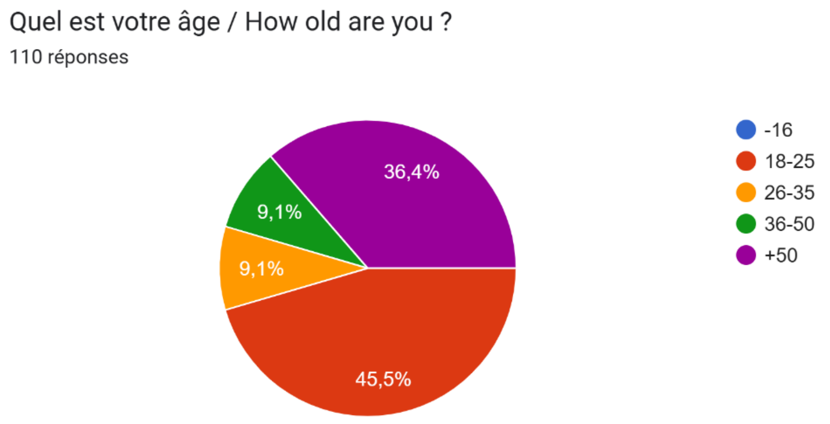

Figure A2: Participants that follow a special diet

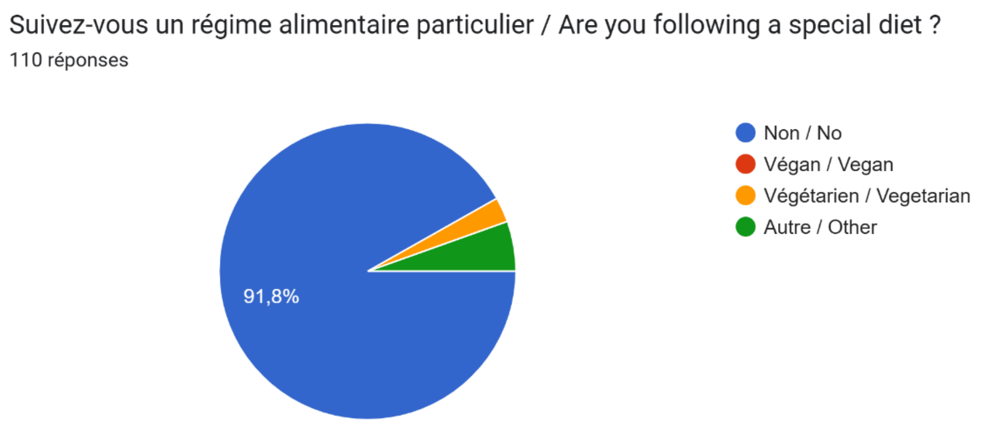

Figure A3: The frequence of ready meals

A quelle fréquence consommez-vous des plats préparés en moyenne (Ex : lasagne, pizza) / How often do you eat ready meals on average ? (E.g. lasagne, pizza)

110 réponses

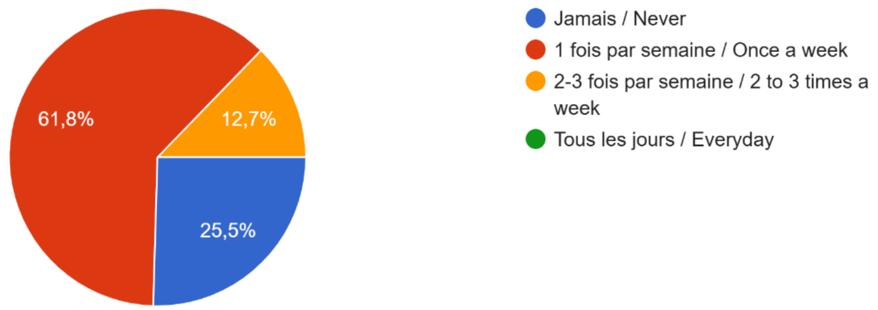

Figure A4: The type of ready meals

Quel type de plats préparés achetez-vous le plus souvent / What type of ready meals do you buy most often ?

110 réponses

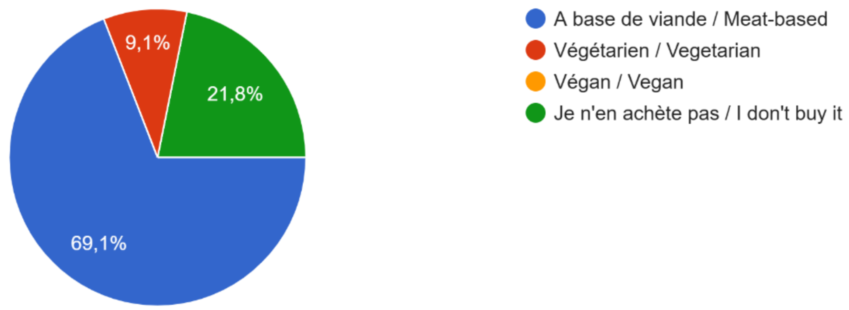

Figure A5: The motivation behind the choice of ready meals

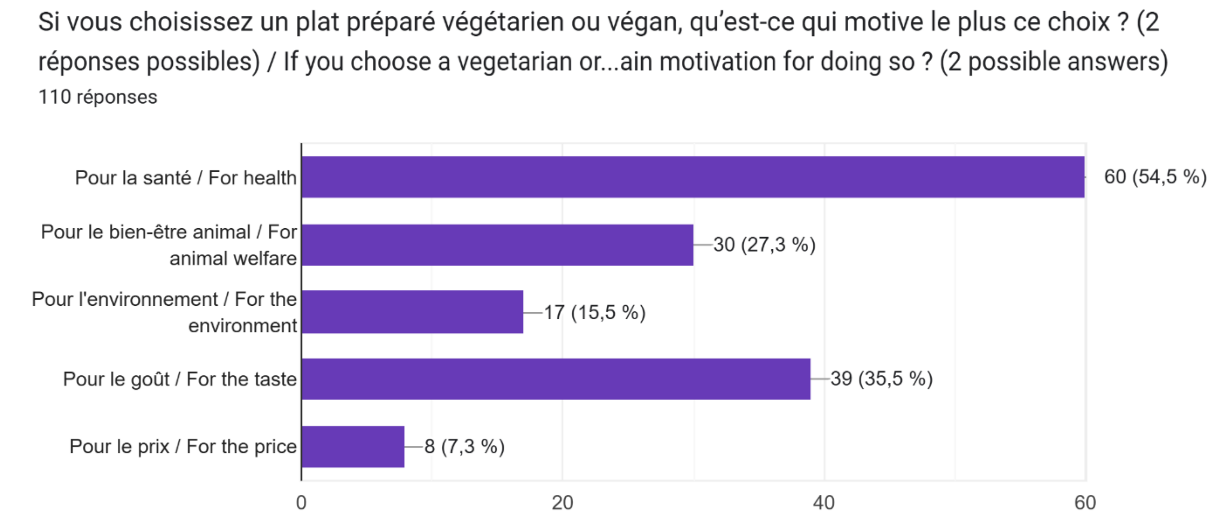

Figure A6: The perception on ready meals

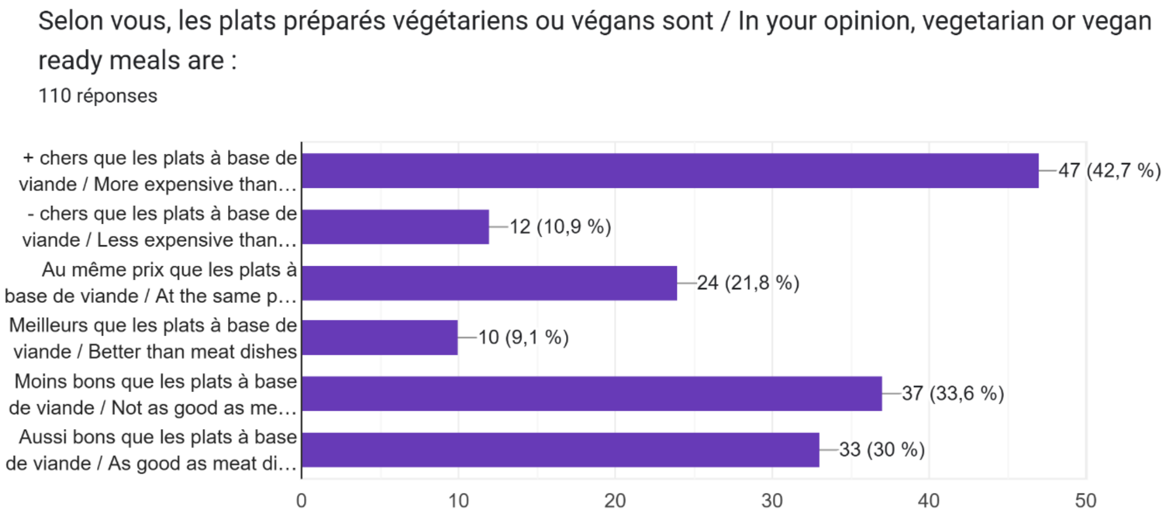

Figure A7: Opinion on ready meals' distribution

Souhaiteriez-vous voir plus de plats préparés végétariens ou végans dans les rayons / Would you like to see more vegetarian or vegan ready meals on the shelves ?
110 réponses

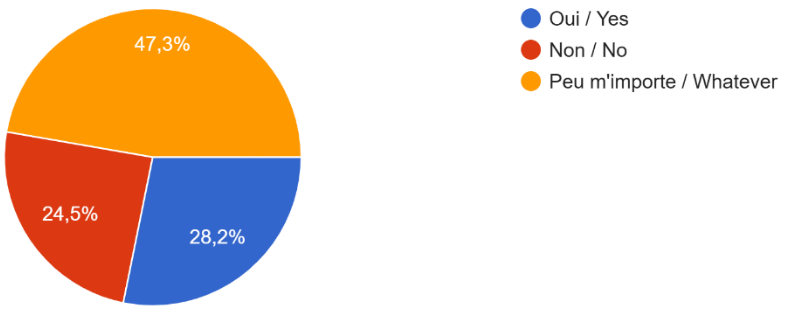

Figure A8: Barriers to buying prepared meals

Quel est selon vous le principal frein à l'achat de plats préparés végétariens / What do you think is the main obstacle to buying vegetarian ready meals ?
110 réponses

Figure A9: The price of ready meals

Selon vous, un plat préparé végétarien devrait coûter / In your opinion, a vegetarian ready meal should cost :

110 réponses

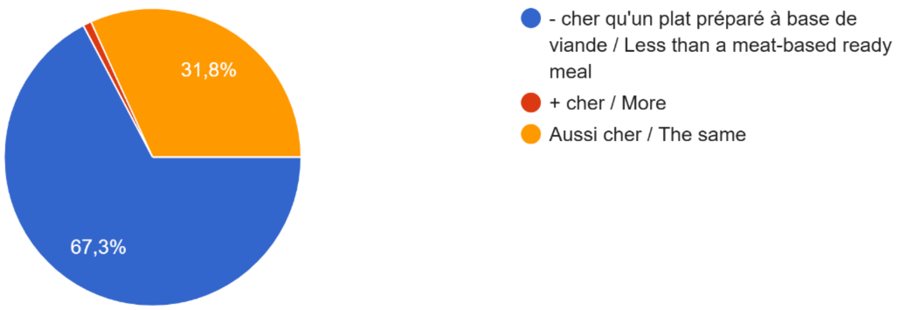

Figure A10: the readiness of buying ready meals

A goût et à prix identiques, seriez-vous prêt à acheter un plat préparé végétarien (exemple : lasagne sans viande) / If the taste and price were the same,... a vegetarian ready meal (e.g. meat-free lasagne) ?

110 réponses