

2023 PROVEG INTERNATIONAL FAST-FOOD MENU RANKING



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INTRODUCTION

Positive perceptions around plant-based food have increased dramatically in recent years, leading to an increase in overall demand, particularly among consumers seeking to reduce their consumption of animal-based food products. Food companies have responded to these shifts in consumer behaviour by innovating their products, while investors and shareholders are increasingly focusing their attention on the plant-based sector, and forward-thinking food service companies are adjusting their strategies in order to provide consumers with the foods they want.



These developments reflect the growing value of the global plant-based-food sector, estimated at USD 40.21 billion in 2021 and expected to reach USD 78.95 billion by 2028, with a CAGR of 11.9%.¹ Similarly, the market for plant-based meat alternatives is predicted to double within the next five years, growing from USD 7.9 billion in 2022 to USD 15.7 billion in 2025.²

Fast-food chains, especially, have led the charge in incorporating plant-based items into their menus and marketing them to their respective audiences. For example, last year McDonald's Germany launched a vegan McFlurry, offering a plant-based dessert option for customers. Similarly, Pizza Hut UK also made a significant change to its product offerings by introducing Violife plant-based cheese in all of its UK locations, both for dine-in and delivery customers, while Burger King has committed to going 50% plant-based by 2030. These demonstrate the growing trend of fast-food chains improving and expanding their plant-based menu offerings, whether they're burgers, chicken, pizzas, or desserts. This is a global shift, with companies around the world catering to the growing demand for plant-based options.

Despite these positive developments, recent research by the Smart Protein project indicates that consumers looking for plant-based products when dining out are often faced with very limited options. For example, nearly half of flexitarian respondents stated that "There is not enough choice in plant-based food when I eat out," which clearly highlights the fact that more plant-based products are needed in the food-service sector. Additionally, 38% of respondents, overall, said that plant-based meals or snacks are often not available when eating out.³

The fast-food industry, in adapting to and capitalising on the growing demand for plant-based foods, can play a unique and influential role in promoting plant-based eating more broadly. By leveraging their popularity and widespread reach, the leading fast-food chains have the power to shape consumer perceptions and drive positive changes in dietary choices. Not only does this present a significant business opportunity, but it also has important implications for sustainability and the environmental impact of our food. The incorporation of more plant-based options by fast-food chains has the potential to contribute to a reduction in agricultural greenhouse gas emissions and foster greater environmental sustainability.

EXECUTIVE SUMMARY

In order to assess the availability of plant-based offerings at fast-food chains across multiple countries, ProVeg used its scorecard methodology to rank the five biggest global fast-food chains in terms of the plant-based favorability of their online menus. Specifically, the ranking looks at McDonald's, Subway, Burger King, Pizza Hut or Dominos (depending on the country), and KFC. The countries sampled were Belgium, Czechia, Germany, the Netherlands, Poland, South Africa, Spain, the UK, and the US.

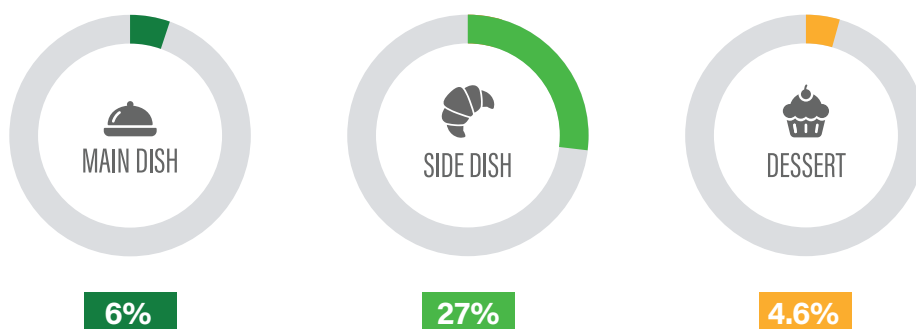
Data collection took place in March 2023, with points awarded based on the total and relative values of plant-based main dishes, sides, and desserts, as well as labelling conventions and menu presentation. This report summarises the ranking results, showcases the contributions the biggest fast-food companies are making to the plant-based food space, and highlights opportunities to capitalise on growing consumer trends in plant-based eating. (Read more about our scoring system in the 'Methodology' section at the end of this report.)

We found that the biggest players in the fast-food industry are adapting to the changes in eating habits taking place globally, but that there is still plenty of room for improvement. As the demand for plant-based food continues to surge, the fast-food industry has recognised the immense business opportunities and sustainability benefits associated with incorporating plant-based options into their menus.

Across all countries, ProVeg analysed 43 menus. Only 22 menus (51%) offered at least one plant-based option. In addition, of the menus analysed, only 85 main dishes were plant-based out of a total of 1,473 main dishes. This means that just under 6% of main dishes listed across all 43 menus were plant-based.

Plant-based desserts were similarly lacking. Of the 282 desserts presented on the 43 menus, only 13 (4.6%) were plant-based. Plant-based sides were also limited, but best-represented out of the three meal categories, comprising 27% of total sides across all menus observed.

PLANT-BASED OPTIONS



Overall, Burger King performed best across the nine countries reviewed, while KFC performed worst. It's clear that some chains are doing better than others, but we found that all of the chains should focus on improving their menus in two key ways: increasing the number of plant-based options and improving menu strategies.

BEST PRACTICES

Make more options plant-based by default.



Making menu items plant-based by default is a very effective way of increasing plant-based purchasing among mainstream consumers.

For many chains in most countries, it is also of critical importance to offer plant-based sauces and cheeses.



Don't just add plant-based items – replace or remove animal-based options.

Changing what is available to customers can help to further normalise plant-based eating and increase plant-based purchases among mainstream consumers.

Integrate plant-based options with similar items and list them first.

In addition to integrating plant-based items into the main section of the menu, you should also repeat the items in a separate plant-based section. Doing both of these will nudge mainstream consumers toward choosing plant-based options while making it easy for vegan and vegetarian customers to navigate the menu.

Don't use the product name as the label. Instead, use proper, consistent labels that are subtle yet easily identifiable to those looking for them.

Pictograms are a great choice. This can help to minimise the deterrent effect that vegan-identifying denominations can have on mainstream consumers, while accommodating those who follow vegetarian or vegan diets.

Use enticing language in your item descriptions.

This is an opportunity to highlight the taste experience and cooking technique. Using positive descriptors also helps to frame plant-based items as being equivalent to their animal-based counterparts.

When naming menu items, choose words that focus on the product's culinary theme, sensory experience, or brand of plant-based analogue

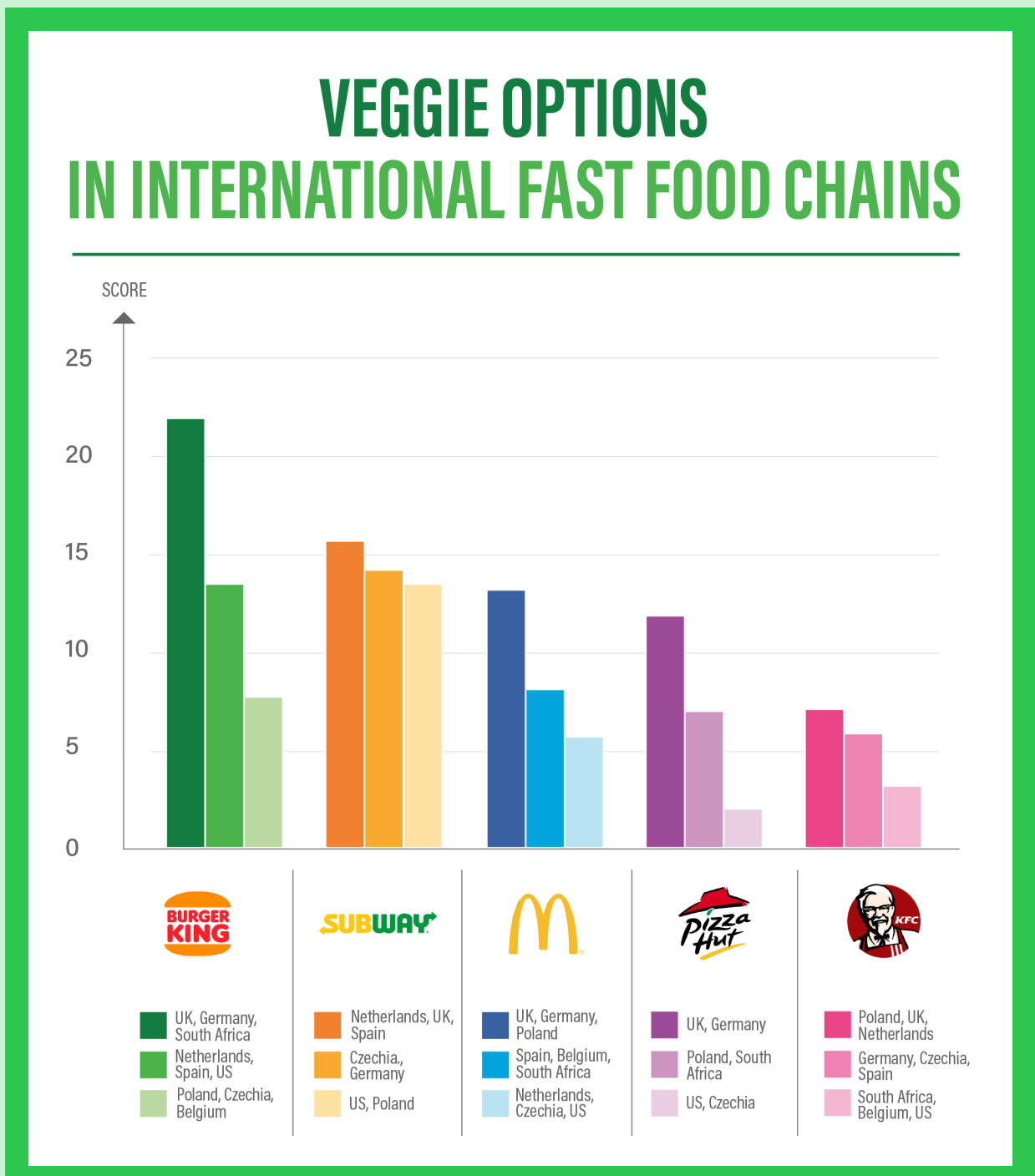
while minimising the use of words like 'veggie' or 'plant-based,' and totally avoiding words like 'vegan,' 'vegetarian,' or 'meatless.'



INTERNATIONAL COMPARISON

This section details results of the international ranking by company, followed by a section which dives into menu performance at the country-level. The international results are visualised below.

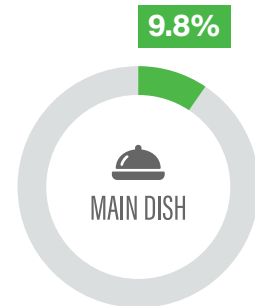
(For the sake of visualisation, the countries listed in the graph below are grouped into buckets which may not reflect their exact numeric score. See the country-level sections of this report for more detailed scores.)



BURGER KING

Plant-based menu items represent 12% of the overall product range at Burger King, while the franchise outperforms the other chains in terms of main dishes.

Burger King performed best out of the fast-food chains reviewed for this ranking, offering 30 plant-based main dishes out of 307 across all nine countries. This performance lines up with other Burger King efforts and experiments to promote plant-based eating, including opening its first plant-based location and implementing a plant-based-by-default ordering model at a location in Austria. Notably, the company has committed to making all of its menus 50% plant-based by 2030.



PLANT-BASED MAINS

Burger King's Belgium, Poland, and US online menus do not list any plant-based main dishes. The Impossible WHOPPER is currently available in many locations in the US but not everywhere, and it is listed with mayonnaise that is not plant-based. It is also worth noting that Burger King Poland has an opportunity to make a handful of vegetarian main dishes plant-based if made without dairy-based cheese.

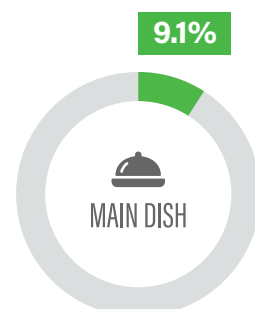
Burger King UK takes the crown in the main dishes category, offering ten plant-based main dishes, which represents about 35% of the total main dishes on the menu. Burger King South Africa and Netherlands each offer six plant-based main dishes, while Germany offers five and Spain just one.

Regarding labelling, regulatory and social pressure on fast-food companies can lead to the overuse of labels. Despite the current shifts in consumer attitudes and dietary habits, some customers might nonetheless be deterred by the preponderance of labelling systems that suggest that plant-based items are for some people and not others. ProVeg encourages Burger King to make labels easily identifiable to the target consumers while minimising the deterrent factor for other consumer groups.

SUBWAY

Plant-based menu items represent 12% of Subway's overall product range, with the chain outperforming the others when it comes to menu presentation.

Though Subway and Burger King both list 30 plant-based main dishes on their online menus, Subway's plant-based main dishes represent a slightly smaller percentage of its total number of main dishes, compared to Burger King. (Subway locations were not widely available enough in Belgium and South Africa to be included in this ranking.)



PLANT-BASED MAINS

Subway offered plant-based main dishes on each of the online menus analyzed. Their Dutch menu offers seven plant-based main dishes, performing best among the other Subway menus. Subway UK offers five plant-based main dishes, while Spain, Czechia, and the US each offer four, and Poland and Germany offer three.

Internationally, Subway performs best, on average, when it comes to menu presentation, averaging six out of eight possible points. Menus across all countries consistently integrate their plant-based items with their animal-based counterparts, which is one of the best menu strategies for increasing plant-based purchasing among mainstream consumers. Subway also does a great job naming some of its plant-based options, with names like 'Rockin' Moroccan' and 'TLC® Teriyaki'. These names are optimal because they focus on the culinary theme of the dish while avoiding words such as 'vegan' or 'meatless,' which tend to turn away mainstream consumers.

MCDONALD'S

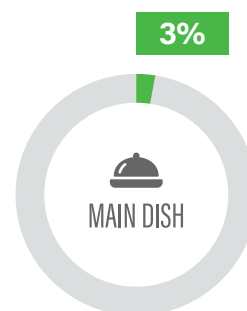
Plant-based menu items represent 9% of the overall product range offered at McDonald's, but they outperform the others when it comes to the desserts category.

Out of 242 main dishes across all nine McDonald's menus, only seven were plant-based.

Of the countries reviewed for this report, McDonald's offers plant-based main dishes only on its UK, Germany, and South Africa online menus. Of these three, the UK does best, offering five plant-based main dishes, whereas only one plant-based main dish appears on their Germany and South Africa online menus.

McDonald's Czechia lists three main dishes which could be plant-based – the Veggie Burger, Veggie Wrap, and Veggie Salad – but all of them contain dairy-based cheese. In the Netherlands, McDonald's offers the McPlant, made with the Beyond Meat patty but with dairy-based cheese. Leaving out the sauce on the one potentially plant-based burger on McDonald's Belgium's menu wouldn't count, since the patty itself contains animal-based products. McDonald's Poland lists two options on its menu – the Veggie Burger and the Veggie McWrap – but both of them contain dairy-based cheese.

Overall, while McDonald's chains in different countries have varying levels of plant-based options and transparency about ingredients, there is great potential to add more plant-based items. McDonald's can capture mainstream appeal by avoiding terms such as 'veggie' in menu-item names and incorporating a subtle labelling system for those following vegan and vegetarian diets. But above all, McDonald's can make their nearly plant-based items plant-based by default.



PLANT-BASED MAINS

PIZZA HUT

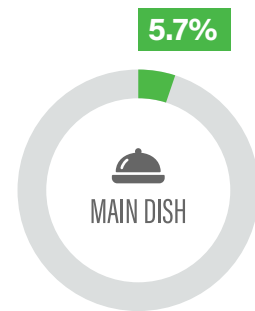
Plant-based menu items represent 8% of overall product range at Pizza Hut, which performed decently in both the main-dishes and menu-presentation categories.

Among the country franchises that are doing well in terms of plant-based options, Pizza Hut Germany stands out, with a variety of plant-based options, including pizzas and pasta dishes, as well as a build-your-own option that can be customised to be plant-based.

On the other hand, Pizza Hut menus in some countries don't offer any plant-based options. This includes Pizza Hut Czechia and Pizza Hut Poland, for example, while Pizza Hut South Africa lists some nearly plant-based main dishes that don't make the cut because of a topping or sauce.

In terms of menu presentation, the majority of Pizza Hut menus across the countries reviewed integrate their plant-based options into the general menu, making them more visible to all customers. However, Pizza Hut Czechia and Germany list their plant-based options exclusively in a separate section of the menu, making them less visible to the average customer.

Overall, Pizza Hut chains that are making an effort to offer plant-based options and integrating them into the general menu are likely to appeal to a wider range of customers, including flexitarians and omnivores. Conversely, chains that do not offer any plant-based options may be losing out on customers who are seeking plant-based options, while chains that segregate their plant-based options may be missing an opportunity to make these options more appealing to a wider range of customers.



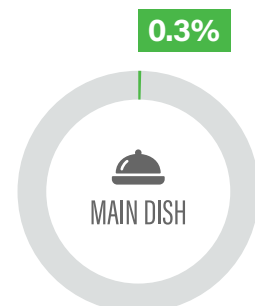
PLANT-BASED MAINS

KFC

Plant-based menu items represent 6% of the overall product range at KFC, with less than 1% of main dishes being plant-based.

Of the KFC menus reviewed in the nine countries, 325 main dishes were counted, only one of which was listed as plant-based. There is a huge opportunity for KFC to make its menus appeal to the growing demand for plant-based options, while promoting more sustainable eating.

Based on the comparison of KFC chains across several countries, it is evident that there is a significant variation in their plant-based offerings. KFC Netherlands has a plant-based mayonnaise, while KFC Germany has several plant-based



PLANT-BASED MAINS

options under the 'Veggie' label, although these options contain milk or egg ingredients. Indeed, KFC Germany and Poland are doing relatively better than the other countries, with several plant-based side dishes available on their menus. KFC Spain and KFC Czechia offer vegetarian main dishes and sides, but no plant-based main dishes. There is plenty of room for improvement in terms of all offerings.

KFC South Africa, Spain, and the US don't list any plant-based main dishes on their online menus. Although Beyond chicken is available in select regions of the US, these items are not listed on the US online menu, and so are not counted in this ranking. ProVeg hopes to see KFC US's Beyond chicken options widely available nationwide in the future.

In each of these cases, KFC operates in markets with a growing abundance of local and international chicken alternatives that speak to the KFC flavour and style. Simply incorporating a plant-based nugget or burger, and making them available nation-wide, would significantly change their status for conscious consumers that want something that speaks to their values but still has the KFC flavour. Furthermore, maximising plant-based options and strategically presenting them on the menu will help to promote more sustainable eating among mainstream consumers.



COUNTRY-LEVEL RESULTS

In this section, ranking performance is discussed on a country-level basis, focusing solely on the fast-food menus that offer plant-based main dishes. To see the performance of chains that do not offer any plant-based main dishes, please refer to the country-specific graphs in each subsection.



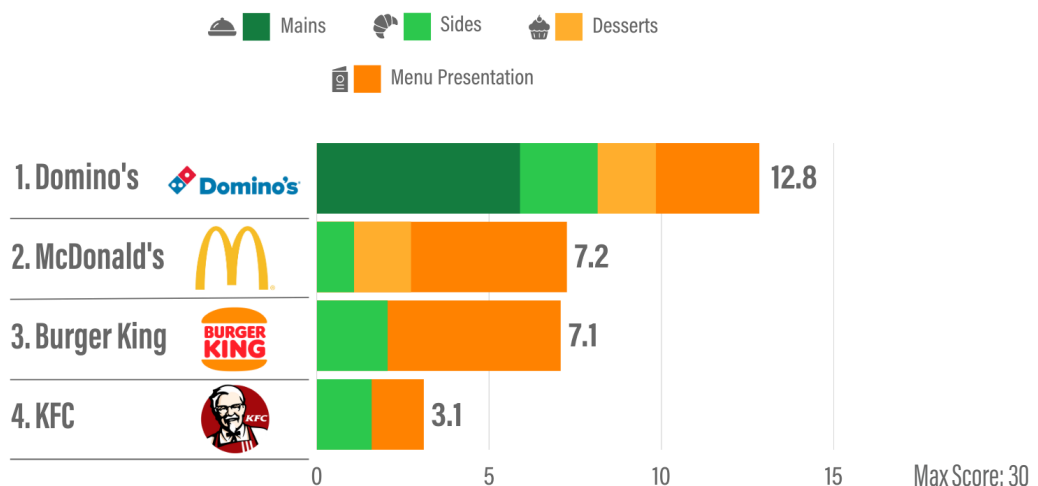
BELGIUM

One in three Belgians say they eat vegetarian food at least weekly according to a biannual survey conducted by iVOX at the request of ProVeg Belgium (formerly EVA vzw) in January 2022. Moreover, the number of Belgians eating meat and fish every day continues to decline. The combined percentage of vegetarians and vegans has increased significantly compared to 2020, from 5% to 8%. The number of flexitarians is also increasing: 28% of Belgians eat a meat-free meal at least one day a week, compared to 25% in 2020, and 13% in 2016.⁴

It is notable that women and young people in Belgium eat the least meat. Among Belgians younger than 35, only 58% still eat meat and fish every day. Animal welfare, the climate, and health remain the most important motivations for those who follow vegetarian or vegan diets. For other Belgian consumers, health is the main driver for reducing meat intake, followed by climate and animal welfare.⁵

Of the four fast-food chains analysed in Belgium, only Domino's offered any plant-based main dishes.

FAST-FOOD PERFORMANCE IN BELGIUM



Domino's

Because Pizza Hut has a relatively small number of branches in Belgium, ProVeg evaluated Domino's for this section instead.

Domino's came in first place among the fast-food chains reviewed in Belgium, and was the only to offer any plant-based main dishes. The company's plant-based offerings in Belgium comprise about 9% of the main dishes on its menu.

Their online menu offers several promising plant-based options, including the Pizza Vegan Spicy, Pizza Vegan Pepperoni, Pizza Vegan Funghi, and the Pizza Vegan Margherita. It also lists two plant-based sides – topped with plant-based cheese and a pepperoni alternative – along with two plant-based desserts.

The menu uses an unobtrusive pictogram of a green leaf to identify plant-based options, which earns them full points in the labelling subcategory. However, their convention of using the word 'vegan' in the names of their plant-based items will tend to deter consumers who don't identify as either vegan or vegetarian. A more effective combination of labelling and naming could be achieved if their menu-item names avoided the word 'vegan,' and instead focused on the sensory experience and culinary themes.

Another area in which Domino's Belgium could improve is by integrating their plant-based items into the main section of the menu. At the time of data collection, their plant-based items were sequestered in a separate section of the menu, titled "Vegan", with vegetarian items also in a separate "Veggi" section. ProVeg recommends integrating plant-based and vegetarian items with their counterparts in the main section of the menu, and listing plant-based items first. Integrating these items would mean that Domino's would need to add an additional pictogram so that customers can differentiate between plant-based and vegetarian options.



Pizza Vegan Margherita



Pizza Vegan Spicy



Pizza Vegan Vegeroni



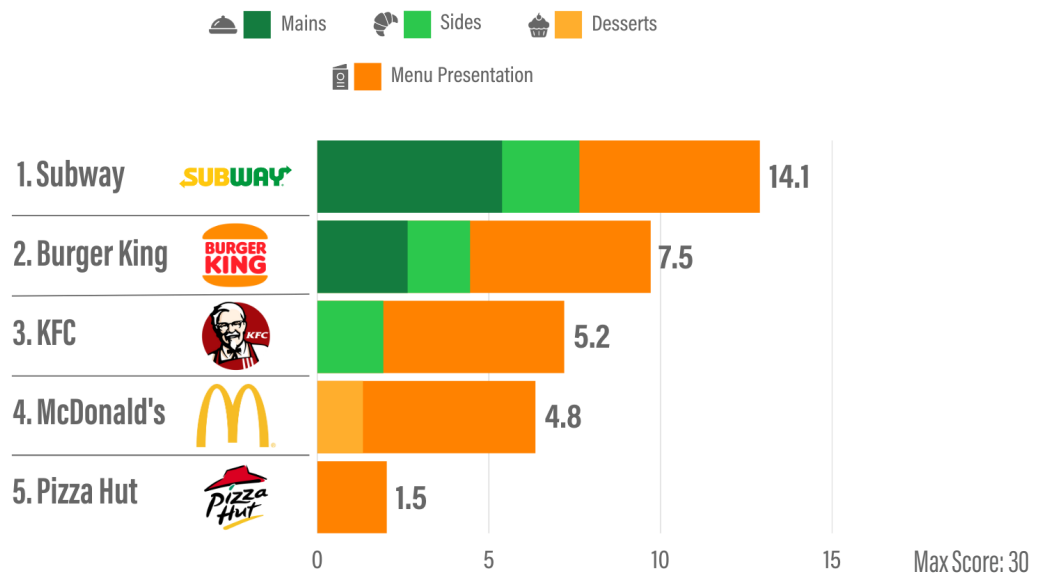
Pizza Vegan Funghi

CZECHIA

Although fast-food chains in the Czech Republic have been slower to add plant-based items to their menus, more and more Czechs are reducing or removing animal-based foods from their diets. A 2022 consumer survey by FMCG Gurus revealed that 14% of Czechs report never eating meat, while 27% of respondents claim to only eat meat sometimes. Of respondents who eat meat on a regular basis, 38% say they have made efforts to reduce their meat consumption in the last twelve months.⁶

In 2022, ProVeg Czechia released a more comprehensive ranking of fast-food restaurants in the Czech Republic, which can be viewed [here](#).

FAST-FOOD PERFORMANCE IN CZECHIA



Subway

Coming in first among its cohort in Czechia, Subway offers a great selection of plant-based options and has integrated its plant-based items into the overall menu, while repeating them in a separate 'veggie' section of the menu. Subway's was the only online menu among the top fast-food chains in Czechia that listed any plant-based main dishes. Plant-based options make up about 14% of their total main dishes.

In terms of mains, Subway Czechia offers the Spicy Guacamole Salad, the Spicy Veggie, the Spicy Veggie Queen, and the Veggie Delight. However, the Veggie Delight includes mayonnaise and so is not counted as plant-based in this ranking.

One highlight of Subway Czechia's menu is the TLC® Teriyaki, which stands for "Tastes like chicken". This is a great example of a name for a plant-based option that optimises appeal to consumers generally, including flexitarians and omnivores, by choosing a creative name that highlights the culinary style of the dish while avoiding words like 'vegan.'

While the plant-based items are repeated in the 'veggie' section of the menu, there is no consistent ingredients list, which can make it difficult for consumers who follow certain diets to make a suitable choice. Subway Czechia could add a comprehensive ingredients list and implement a subtle labelling system that doesn't interfere with the choices of consumers broadly, yet is clearly identifiable to those looking for plant-based options.

Overall, Subway Czechia offers a great selection of plant-based options, and, with some improvements to its labelling system and consistency in terms of naming, they could improve their score even further.



Spicy Guacamole Salad



Spicy Veggie Queen



Spicy Veggies Sub



TLC Teriyaki

Subway Czechia

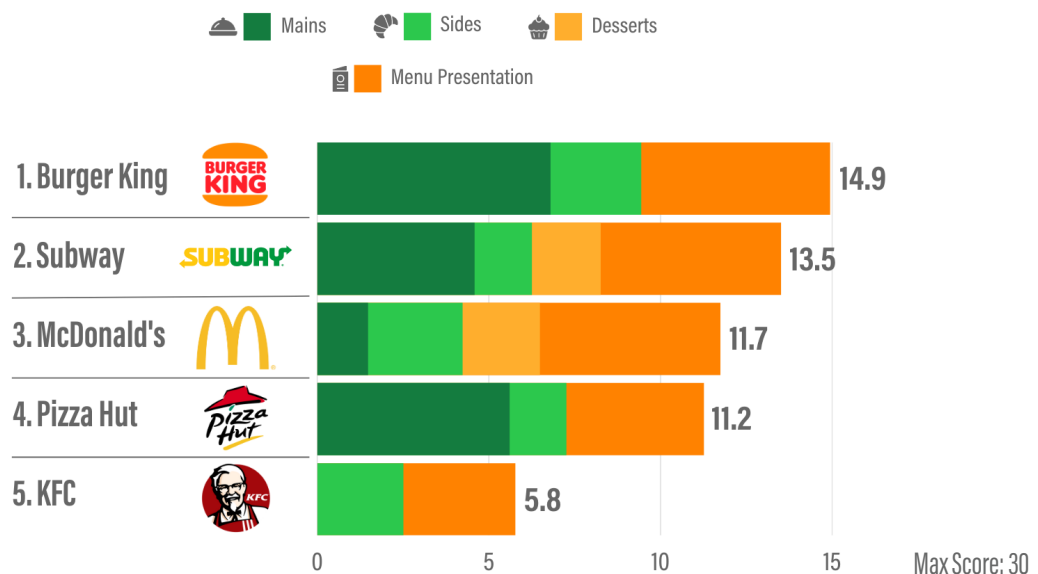
GERMANY

The plant-based sector in Germany is the largest in Europe, with a significant 30% of Germans identifying as flexitarian and 10% following a plant-based diet.^{7,8}

When talking about satisfaction and the overall opinion of plant-based options on fast-food menus, Germans report 51% satisfaction with the current options, and 62% of consumers have a positive opinion toward brands adding more plant-based options to fast-food menus⁹. Regarding purchase drivers in Germany, taste, price, and curiosity to try something new are the top motivators for consumers to try a plant-based option at fast-food restaurants.¹⁰ This positive environment offers a green light for chains to embrace plant-based foods and increase their plant-based product ranges.

ProVeg Germany will release a more comprehensive ranking of fast-food restaurants in the country this year.

FAST-FOOD PERFORMANCE IN GERMANY



Burger King

Burger King takes first place in Germany, offering five plant-based main dishes, and several plant-based sides. Plant-based offerings comprise about 18% of total main dishes on Burger King Germany's online menu.

Burger King's was the only menu among the German chains reviewed to receive points for using positive language on plant-based items. For example, part of the description for its Plant-based Hamburger translates to "A juicy plant-based patty garnished with tangy pickles: this is indulgence at its best."

When it comes to naming its items, Burger King Germany uses the term 'plant-based' in almost every case, which tends to appeal to consumers looking to reduce meat consumption more than words like 'veggie' or 'vegan.' What Burger King does really well, and what other restaurant chains can learn from, is to prompt customers at the point of order. For example, at select Burger King locations in Germany, customers are asked whether they want to enjoy their burger with a patty plant-based. Though not accounted for in this ranking, these kinds of prompts at checkout are a strong move toward normalising plant-based eating in an industry that has been built and centred on animal-based ingredients.

Overall, ProVeg applauds Burger King Germany for its menu's plant-based favorability. Burger King's greatest potential now lies in further expanding its range and developing plant-based desserts.



Plant-based Hamburger



Plant-based Long Chicken



Plant-based Nuggets



Plant-based Whopper

Subway

Subway Germany came in second place among the German chains, offering three plant-based main dishes – the Veggie Delite, the Spicy Vegan Patty, and the Meatless Chicken Teriyaki – which constitute about 16% of its main dishes. The company also earns points for integrating these items with their counterparts on the menu, instead of just listing them in a separate section.

However, Subway Germany could improve its naming conventions and labelling system for plant-based items. It is recommended that words like 'meatless' and 'vegan' should not be used in item descriptions – instead, items that are suitable for vegans could be accompanied by a consistent and subtle, yet easily identifiable label, such as a pictogram.



Meatless Chicken Teriyaki



Spicy Vegan Patty



Veggie Delight

Subway Germany

McDonald's

McDonalds came in third place in Germany. Although there is only one plant-based option – McPlant Nuggets (which comprises 5% of total main dishes) – the franchise performs very well in other categories and exceptionally well in desserts. Out of all the chains in all the countries reviewed for this ranking, McDonalds Germany takes the crown in the desserts category, offering three plant-based desserts out of a total of eight, while the majority offer none at all.

As far as main dishes go, McDonald's Germany recently removed the VeganTS burger from its range and introduced the McPlant burger, featuring Beyond Meat with dairy-based cheese. Because this dish is listed with dairy-based cheese, it could not be counted for this ranking. ProVeg recommends that McDonald's Germany list its McPlant without dairy cheese, giving customers the option to add cheese if they wish.



McPlant Nuggets



McFlurry Chocolate Vegan



McSundae Chocolate Vegan

Pizza Hut

While Pizza Hut comes in fourth place in Germany, it comes in second in the main-dishes category, offering four plant-based options – the Creamy Cheez Pasta Vegan and the Vegan Lovers, Vegan Farmers, and Tuscany Spicy Vegan pizzas, collectively making up about 16% of total main dishes.

Additionally, although Pizza Hut Germany integrates a plant-based main dish into the general 'Pizza' section, this only represents one-fourth of its plant-based line – most of the plant-based main dishes can only be found in the section of the menu titled 'Vegan.'

Titling this section and all the items in it as 'vegan' suggests that these items are not for everyone but rather only for those who identify as vegan.

ProVeg recommends integrating all plant-based main dishes with their mainstream counterparts and giving them names that reflect a culinary theme or sensory experience.



Creamy Cheez Pasta Vegan



Tuscany Spicy Vegan



Vegan Farmers



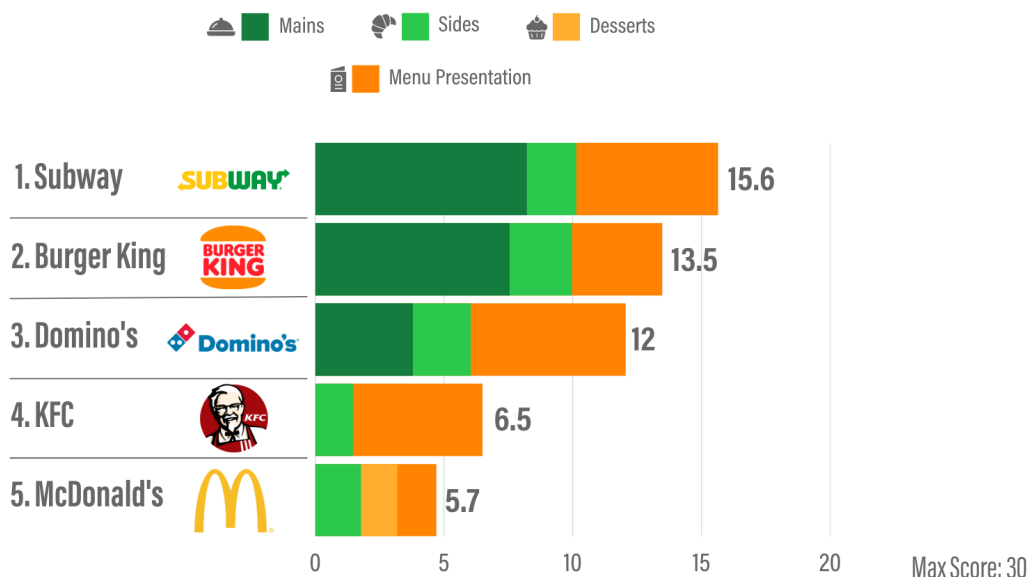
Vegan Lovers

THE NETHERLANDS

In the Netherlands, there is a growing trend among consumers to be more mindful of their meat consumption and ecological impact. This has led to the rise in popularity of several meat-free dietary choices. Individuals in the region are increasingly adopting plant-based lifestyles, which encompass a range of options such as veganism, vegetarianism, pescetarianism, and flexitarianism, each representing different degrees of embracing plant-based foods.

The Netherlands has the highest per-capita sales of meat alternatives of any European country, with over 70% of citizens in favour of transitioning to a more plant-based diet.^{11, 12} The market share of plant-based products in the Dutch foodservice industry grew from 1.4% in 2016 to 5.4% in Q4 of 2021.¹³

FAST-FOOD PERFORMANCE IN THE NETHERLANDS



Subway

Subway comes in first place in the Netherlands, and second place in the overall ranking. On its online menu, you can find a range of plant-based main dishes among its subs, wraps, and salads, including the Spicy Vegan Patties and the Vegan Supreme. On Wednesdays, an additional plant-based option is available, the Vegan Supreme sub, which is featured as the Sub of the Day. Plant-based options comprise about 12% of their total main dishes.

Subway also offers sandwiches that are only available on specific days of the week, such as the Monday-only sub and the Tuesday-only sub. Although these sandwiches are not available every day, they are permanently on the menu and offer another delicious plant-based option for customers.

Dutch Subway does not use a proper labelling system to identify its plant-based items, relying instead on item names. The menu predominantly uses words like 'veggie' and 'vegan' in the names of its plant-based main dishes, which could deter the large segment of consumers who are seeking to reduce meat in their diet but who aren't strictly vegan or vegetarian.



Spicy Vegan Patty



Vegan Patties Wrap



Vegan Supreme Sub



Vegan Supreme Wrap

Burger King

Burger King came in second in the Netherlands, offering a range of main dishes, six of which are plant-based, including the Veggie Long Chicken, the Veggie WHOPPER, and Veggie Nuggets. These plant-based offerings represent 15% of their total main dishes. Burger King Netherlands might have come in first place, but many of the items in the 'Veggie' section of the menu contain sauces or cheese that prevent them from counting as plant-based.

Burger King Netherlands does not use a proper labelling system to identify its plant-based items, relying instead on item names. The company uses 'veggie' in the name of both vegetarian and plant-based main dishes, which some may find confusing. To determine if a menu item is plant-based, customers need to carefully read the item descriptions.

Overall, Burger King's Dutch menu offers a great selection of plant-based options, and with some improvements to its labelling system, they could improve their score even further.



Veggie Long Chickem



Veggie Nuggets



Veggie Whopper

Burger King Netherlands

Dominos

Pizza Hut no longer operates in The Netherlands, so ProVeg evaluated Dominos for this section instead.

Dominos came in third place in the Netherlands, offering three plant-based pizza options, with names such as Pizza Vegan Margarita, Pizza Vegan Veggi, and Pizza Vegan Funghi. Dominos also offer sandwiches, but none of the three sandwiches on the menu are plant-based. On Dominos' online menu in the Netherlands, plant-based options constitute about 8% of main dishes.

The labelling system used by Dominos in the Netherlands is great. For plant-based items, a small leaf symbol is used. These labels are identifiable to consumers that follow vegan and vegetarian diets, while being sufficiently subtle so as not to deter mainstream consumers.

Dominos can capture more of the growing number of consumers who are seeking to reduce their meat intake by integrating its plant-based pizzas into the main menu and by choosing item names that focus more on a culinary theme or sensory experience, while avoiding the use of 'vegan.'



Pizza Vegan Margarita



Pizza Vegan Veggi



Vegan Funghi

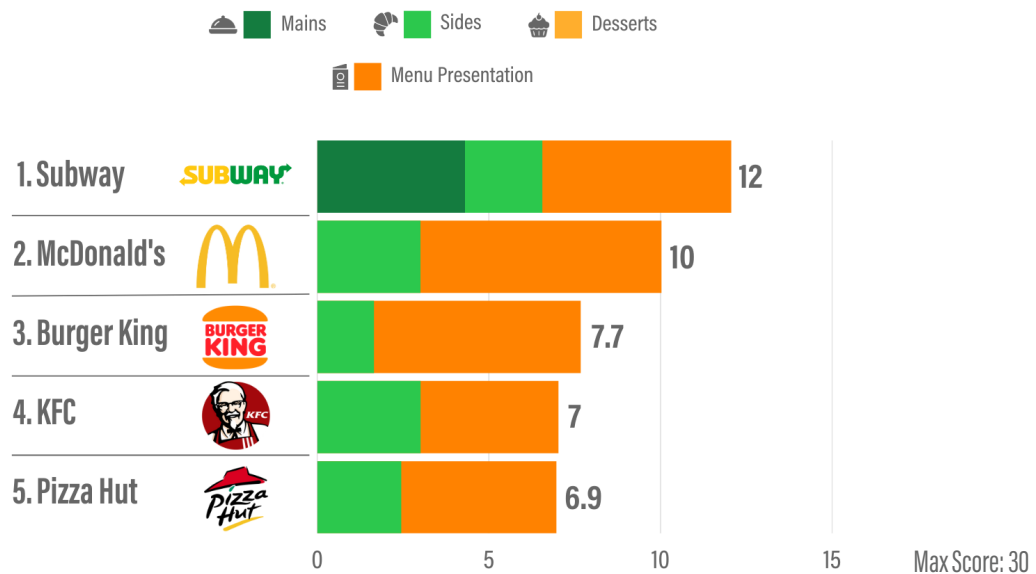
POLAND

In 2022, Warsaw came in ninth place in Happy Cow's Top 10 Vegan-Friendly Cities,¹⁴ with close to 70 vegan restaurants in a ten-kilometre radius, and with most of those within just a single-kilometre radius.

It's no surprise that other Polish cities also boast about growth in the number of plant-based restaurants. Interest in a plant-based diet in Poland is growing very rapidly, with 24% of Polish consumers identifying as flexitarians, and vegans and vegetarians comprising 6% of consumers.¹⁵ According to research conducted by Mintel, 44% of Poles say that health reasons have led them to reduce the amount of processed meat they eat.¹⁶ For the same reason, 23% of Poles are increasingly giving up cow's milk. The decision to reduce consumption of animal-based products is supported by one of Europe's fastest-growing markets for plant-based alternatives.

This report highlights Subway as the only major international chain in Poland that currently offers a plant-based range.

FAST-FOOD PERFORMANCE IN POLAND



Subway

Subway takes first place in Poland, and is the only fast-food chain in the country among those reviewed to list plant-based options on the menu, which make up about 13% of their main dishes.

In Subway Poland, there is a lack of proper labelling for plant-based options, which might be confusing for customers – the term 'veggie' is used for both plant-based items and those that include some egg or dairy ingredients. In order to determine the ingredients, customers must navigate to the item's specific page and read the description and ingredients list.

However, Subway Poland does a good job implementing item integration as well as repeating its plant-based options in a separate section of the menu, thus appealing to mainstream consumers while also accommodating those who follow stricter diets.



Spicy Veggie Queen



Spicy Veggie

Subway Poland

SOUTH AFRICA

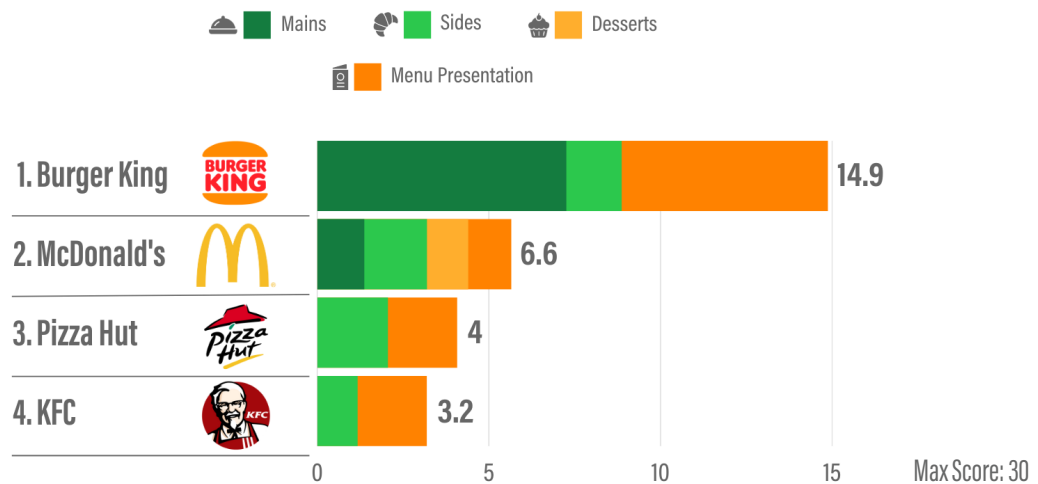
The plant-based food industry in South Africa is gradually developing, presenting a small yet expanding market for plant-based alternatives and quick-service menu choices. Although there was a recent reduction in vegetarians from 3% to 1%, the number of flexitarians increased from 6% to 10%.¹⁷ This increase in those seeking to reduce the level of animal-based meat, eggs, and dairy in their diets reflects the high degree of openness to plant-based eating across all consumer segments of South Africa. A 2021 survey of South Africans found that 67% were highly likely to try and 59% were highly likely to purchase plant-based products.¹⁸

One of the factors hindering the adoption of plant-based options in South Africa is the poor state of the economy. Many consumers have shifted from plant-based meat replacements to more affordable protein sources such as lentils, beans, and frozen chicken. This trend is particularly evident at the retail level, where cost-conscious consumers gravitate toward these alternatives. So as such, it remains unclear how many people are opting for meat-free meals based on personal preference or simply due to economic circumstances.

Despite industry growth and consumer interest, major international fast-food chains in South Africa have been slow in responding, offering limited plant-based options on their menus.

In 2022, ProVeg released a more comprehensive ranking of fast-food restaurants in South Africa which can be viewed [here](#).

FAST-FOOD PERFORMANCE IN SOUTH AFRICA



Burger King

In South Africa, Burger King ranks first, with the most points in the main-dishes category. Its six plant-based options, two of which are V-Label certified, comprise roughly 16% of their main dishes. This approach to labelling is key for South African consumers who are interested in plant-based eating and who rely on clarity of labelling when it comes to plant-based menu items.

There is an opportunity to attract a broader swath of consumers to plant-based options by integrating them with their counterparts on the menu. With the exception of the Vegan Nuggets menu item, which appears in the sides and kids sections, Burger King South Africa keeps its plant-based options separate in a section of the menu called "Veggie Kings."

Burger King South Africa labels its plant-based options with a Vegetarian Butcher Label, V-label, 100% plant-based, and 100% plant-based patty. The preponderance of labels may be confusing for some consumers. While V-label certification and labelling is especially important on fast-food menus due to cross-contamination concerns, it's nonetheless important to implement these labels on the menu in ways that are not confusing, that don't deter non-vegan consumers, and that remain easy for those following a vegan diet to identify suitable options.



Plant-based WHOPPER



Chilli Cheeseburger with plant-based patty



Vegan Nuggets

McDonald's

In South Africa, McDonald's offers just one plant-based main dish, which accounts for 5% of its main dishes. However, this is enough to put them in second place in South Africa.

Although the company integrates its Veggie Burger into the 'Extra Value Meals' section of the menu, it is not integrated into the overall menu – it can instead be found in the 'Vegetarian' menu section. McDonald's South Africa also gains a few points by having some plant-based side dishes, such as fries and hash browns. McDonald's can broaden the appeal of its Veggie Burger by avoiding using 'veggie' terms in the product name and by incorporating a more subtle labelling system for those following vegan and vegetarian diets.

Overall, McDonald's South Africa needs to cover a huge gap if it is to catch up with Burger King in ProVeg's ranking. There's a huge opportunity for McDonald's South Africa to make more main dishes plant-based by default and to present these items in ways that appeal to consumers more broadly.



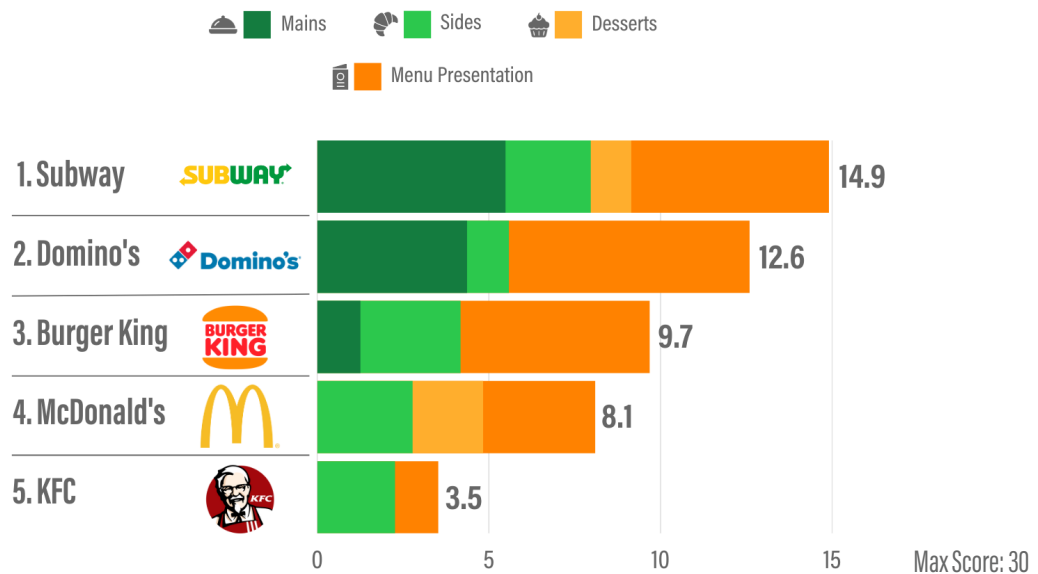
Veggie Burger

SPAIN

Thirty percent of Spanish consumers identify as flexitarian, while 6% follow a plant-based diet. Moreover, Spanish consumers are the most likely to purchase plant-based meat on a regular basis, compared to the other European countries surveyed in the 2021 Smart Protein Project.¹⁹

The plant-based food market in Spain is expected to exceed €1 billion by 2026, roughly double its market size in 2020.²⁰ Demand for more plant-based choices is evident and an increasing number of fast-food chains offer plant-based options.

FAST-FOOD PERFORMANCE IN SPAIN



Subway

Subway takes first place in Spain, offering several plant-based options across its mains, sides, and desserts categories. Roughly 15% of main dishes are plant-based, while the chain also earns points for integrating plant-based options into the main section of the menu.

Subway Spain offers four plant-based main dishes. As in several other countries, the online menu features the 'TLC® Teriyaki' sub, which is a great example of using a creative, specialised name for a plant-based product while avoiding deterrent terms like 'veggie' or 'meatless.'

Though Subway comes out on top in Spain, there's an opportunity to gain more points by adding a proper labelling system and using positive language in item descriptions in order to more effectively promote plant-based options.



TLC Teriyaki®

Dominos

Dominos Spain launched three vegan pizzas in late 2022. With these new additions to the menu, plant-based options now constitute about 14% of their main dishes. Dominos also earns points for using special names, like 'Tony Veggeroni' and 'Varbacoa Heura,' and for integrating

these items into the main section of the menu, instead of presenting them in their own section.

Dominos Spain stands out in this ranking for its useful labelling system. The company received full points for this category, thanks to the subtle leaf symbol placed next to the product image. This makes it easy for customers to identify plant-based options and shows that the company is making an effort to promote these options to mainstream consumers, too.

In general, Dominos Spain's recent addition of plant-based pizzas is a positive step towards catering to a wider range of customers.



Tony Veggeroni



Veggina



Varbacoa Heura

Burger King

Burger King Spain offers just one plant-based main dish, a nine-piece version of its 'Nuggets Vegetales.' While there are other options which are almost plant-based, a single ingredient, such as mayonnaise or cheese, prevents many of the main dishes from being counted as plant-based. The 'Nuggets Vegetales' option accounts for 3% of the total main dishes here.

Burger King Spain does not integrate its plant-based mains with the rest of the mains on its online menu. Instead, these items can only be found in the '100% Vegetariano' section. However, Burger King Spain does get points for using positive language. For example, the description of the 'Nuggets Vegetales' reads "The Nuggets of a lifetime, with the flavour you love so much and made with plants."

Burger King could have closed the points gap with Subway, and made it to first place in Spain, if its vegetarian options were changed to plant-based by default.



Plant-based Nuggets

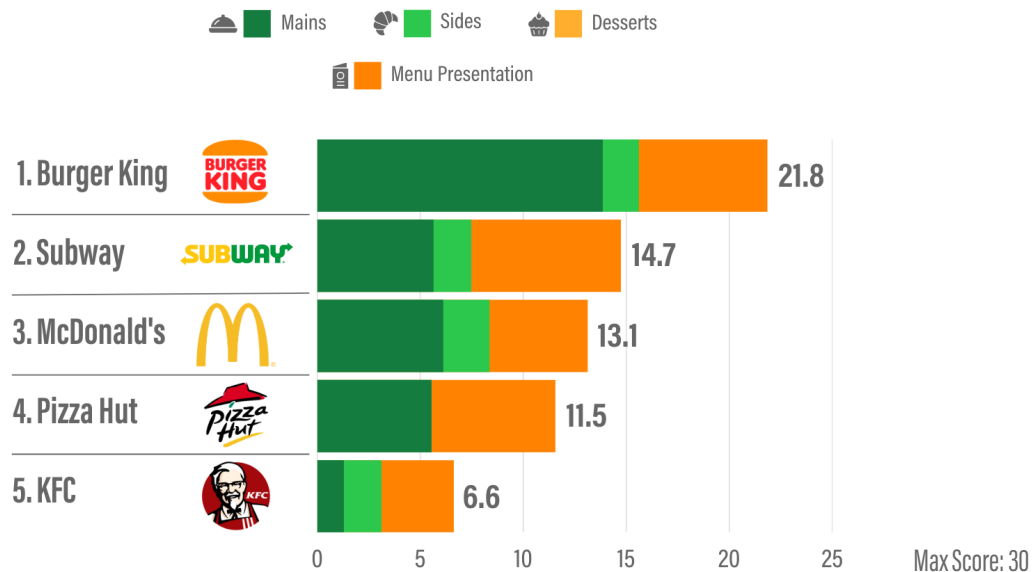
THE UK

The UK market for plant-based foods is the largest on the European continent and has experienced exponential growth. Over the past two years, there has been a remarkable surge in the adoption of plant-based diets among the British population, indicating a notable shift in public opinion and lifestyle choices.

In 2021, more than a third of UK consumers reported consuming more plant-based foods compared to the previous year, according to Smart Protein data. Approximately 23% of UK consumers are actively trying to incorporate more plant-based foods into their diets, with 9% identifying as vegan or vegetarian.²¹ These figures position the UK as having one of the highest shares of plant-based eaters in Europe, second only to Germany.

In terms of satisfaction and the overall opinion of plant-based options on fast-food menus, UK consumers report 50% satisfaction with the current options, and 61% of consumers have a positive opinion toward brands adding more plant-based options to fast-food menus.²² Taste, price, and curiosity to try something new are the top motivators for UK consumers to try a plant-based option at fast-food restaurants.²³

FAST-FOOD PERFORMANCE IN THE UK



Burger King

Burger King UK's menu ranked first among the chains analysed in the UK, and also came in first place in the overall ranking. Plant-based options represent 39% of their main dishes.

The company's UK menu performed exceptionally well in the mains category, having recently introduced versions of its plant-based items featuring La Vie's plant-based 'Bakon,' bringing them up to nine plant-based main dishes.

Burger King doesn't skimp when it comes to using appealing descriptors for its plant-based items, describing their Vegan Royale as having a 'crispy' patty and the Plant-based Bakon King as having 'smooth' plant-based cheese. Using positive descriptors like this is an easy and

effective way to promote plant-based menu items.

Burger King UK uses both 'vegan' and 'plant-based' in the names of plant-based items. This approach is used to differentiate between items that are cooked on the same surface as animal-based foods and those cooked on a separate surface.

Burger King UK's labelling style reflects menu-item names while using the Vegan Society's 'vegan' label to identify vegan items and the 'plant-based' label for items that would otherwise be suitable for vegans except that they come into contact with animal-based ingredients during cooking or preparation.

ProVeg congratulates Burger King UK on taking first place and hopes that their approach to offering and promoting plant-based options will serve as a model for the menus of other major fast-food companies.



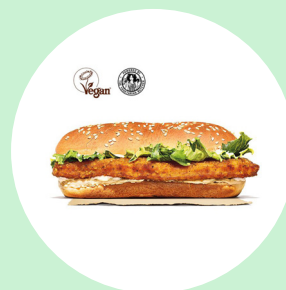
Plant-based Bacon King Double



Plant-based Bacon King



Plant-based WHOPPER



Vegan Royale

Subway

Subway UK ranks second among the five major fast-food companies in the UK, with its five plant-based mains making up about 6% of their total mains.

Subway UK performed particularly well in the menu-presentation category. For labelling, the abbreviation 'VE' is used to designate plant-based items and 'V' to designate vegetarian items. This labelling system is simple and not overly visible, which helps to avoid deterring mainstream consumers who might otherwise be turned away. The company's choice of label helped it to score better than McDonald's UK, which has slightly more plant-based items on its menu but does not have a dedicated labelling system.

There is an opportunity for improvement in the way that Subway UK describes its plant-based offerings, since the current descriptions are unlikely to appeal to a broad range of customers. For example, the 'Plant Patty' menu-item description reads, "This patty's for plant lovers." This is not ideal for promoting plant-based eating among broader consumer groups who possibly don't love plants but still want to eat more of them.



Crinkle Wedges



Plant Patty



Rockin' Moroccan



Plant Patty

Subway UK

McDonald's

McDonald's ranked third among the five major fast-food companies in the UK, and offers five plant-based options, including the McPlant, the Spicy Veggie One, and the Vegetable Deluxe, which comprise about 11% of main dishes on their online menu. Despite ranking third overall, McDonald's performed best among the UK chains in the side-dishes category, offering fries and fried veggie dippers, as well as pineapple and carrots.

McDonald's UK also performed fairly well in menu presentation. They received points for integrating plant-based items into the overall menu and for using appealing language such as 'juicy' in its descriptors. In addition to integrating plant-based items with animal-based items, McDonald's also has vegan and vegetarian sections in its menu.

At the time of research, plant-based items could only be clearly identified by referring to the ingredients list on the McDonald's UK online menu. ProVeg recommends implementing a clear yet subtle graphic such as a pictogram to label its plant-based items. ProVeg also recommends that McDonald's UK consider choosing names for its plant-based menu items that avoid words such as 'vegetable' or 'veggie,' which suggest that the item might only be suitable for those on vegan or vegetarian diets, and instead focus on a culinary theme or sensory experience.



McPlant



Vegetable Deluxe



Veggie Dippers

Pizza Hut

Pizza Hut ranks fourth among the five fast-food companies reviewed in the UK, offering four plant-based main dishes, which make up about 15% of their total mains.

Pizza Hut UK's online menu integrates its plant-based main dishes with its animal-based mains. The company uses 'vegan' as a descriptor in the names of its plant-based pizzas and 'veggie' as a descriptor in the names of its vegetarian dishes, with the Vegan Margherita, the Vegan Veg Sizzler, the Veggie Sizzler, and the Vegetable Supreme featuring on the menu.

Pizza Hut could earn more points here by using names that are more appealing to broader consumer groups, while further points could be earned by using positive descriptors for plant-based items.

Pizza Hut UK does have a 'Create Your Own' model that is made explicit on the online menu, which earns them additional points in menu presentation. However, they could earn far more points by listing more plant-based options, both in terms of mains and side dishes.



Vegan Margherita



Vegan Veg Supreme



Vegan Beyond Italian Style
Sausage Supreme

KFC

KFC UK offers just one plant-based main dish, which accounts for about 3% of the main dishes on their menu. In terms of menu integration, KFC UK has a separate 'vegan' section and does not integrate plant-based items with their animal-based counterparts. This is great for vegans but conceals the plant-based option from broader consumer groups who are unlikely to click on that part of the menu.

The naming of KFC UK's one plant-based option – the 'Original Recipe Vegan Burger' – presents an opportunity for improvement. Instead of using the descriptor 'vegan' in the name, which might act as a deterrent to mainstream consumers, KFC should instead focus on the culinary theme, sensory experience, or specific patty ingredients.

In terms of side dishes, KFC UK offers plant-based options such as fries, corn, and regular beans, but they are not labelled as plant-based, and nor are they included in the 'vegan' section of the menu. This makes it difficult for customers to identify which side dishes are plant-based, without having to download a long ingredients list.



Original Recipe Vegan Burger

KFC UK

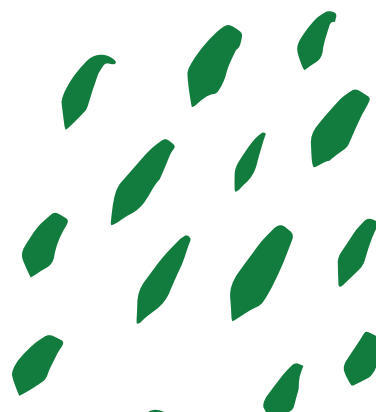
THE US

According to the Plant Based Food Association's 2023 *State of Plant-Based in Food Service* study, a third of the US population has incorporated some level plant-based eating into their diet. They also report that 2023 saw a 400% increase in the number of food-service operators that plan to introduce more plant-based options on their menu. However, out of all the food-service sectors in the US, fast-food operators are the least likely to have added plant-based alternative-protein options to their menus. In fact, 46% of fast-food operators said that they neither offer plant-based-meat options nor do they have any plans to add plant-based-meat options to their menus, and only 42% of fast-food operators offer any plant-based menu items.²⁴

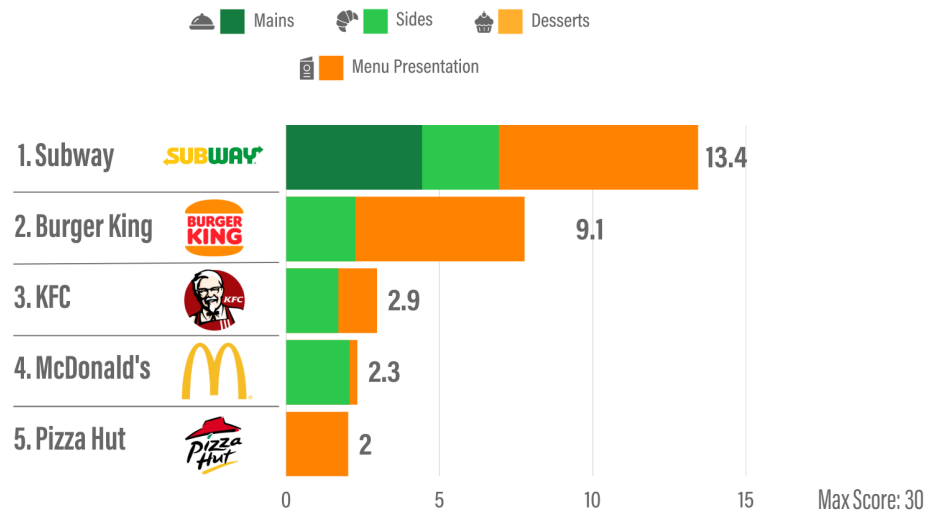
Fast-food operators were also the most likely to view plant-based eating as a short-term trend. This is contrary to many recent market forecasts that predict substantial long-term growth in the plant-based sector in the US and around the globe. Furthermore, half of omnivores and eight out of ten flexitarians in the US say that they want more plant-based options when eating out.²⁵

Regarding satisfaction and the overall opinion of plant-based options on fast-food menus, US consumers report 50% satisfaction with the current options, and 58% of consumers have a positive opinion toward brands adding more plant-based options to fast-food menus. In the US, taste, price, and brand trust rank as the top drivers for consumers.²⁶

Out of the US online menus analysed, only Subway offered plant-based main dishes. Though the Impossible WHOPPER is currently available in many Burger King locations in the US, it is not available everywhere. Furthermore, the US menu's Impossible WHOPPER is listed with egg-based mayonnaise. At KFC, Beyond chicken is still only available in select regions of the US, and so is not counted in this ranking. ProVeg looks forward to seeing these major chains offer plant-based options across the US.



FAST-FOOD PERFORMANCE IN THE US



Subway

Subway takes first place in the US with four plant-based main dishes, and is the only chain out of the five to score points for main dishes. Their plant-based options make up about 4% of total main dishes. All four plant-based main dishes are versions of the Veggie Delite, so there is a lack of diversity among the available options. Furthermore, compared to their sister menus in other countries, Subway's US plant-based main dishes may not be considered to be on par with other main dishes on the menu. This means that the four plant-based main dishes lack an analogue for the central ingredients in other main dishes on their menu, such as animal-based meat or eggs. Instead, the core ingredients of all the plant-based mains are raw vegetables.

On Subway's online menu in the US, there is a lack of proper labelling for plant-based options, which might be confusing for customers. For example, the menu refers to the Veggie Delite as 'vegetarian' in its description, but the ingredients list confirms it is in fact plant-based. In order to determine the ingredients, customers must navigate to the item's specific page and read the description and ingredients list. Subway does a good job implementing item integration on its US menu. This increases the visibility of the plant-based options for mainstream consumers, and in turn increases the likelihood that they choose a plant-based option.

ProVeg applauds Subway US for offering fully plant-based options, but hopes to see them add diversity to their plant-based options in the future as well as adding a more substantial range of plant-based meat-analogues so that the plant-based options align with their other offerings.



Veggie Delite

CONCLUSION

The results of this ranking indicate that there has been definite growth and increased inclusion of plant-based options on the menus of the largest global fast-food chains. By far the largest opportunity for plant-based food adoption currently sits with meat-eating and flexitarian consumer groups, who are interested in trying these options for reasons such as sustainability or health.

Many of the chains reviewed here have missed opportunities to make menu items plant-based by default. Doing so would allow consumers to add non-plant-based cheeses and sauces if they wish, instead of the other way around. Simply replacing one or two ingredients, usually cheese or a sauce, would result in several of their menu items qualifying as plant-based. This would appeal to the growing plant-centred market and flexitarians who are more attracted to a preponderance of options. Plant-based sauces, for example, are generally very well received by flexitarian and even meat-eating customers, since there is usually little to no perceivable difference between plant-based sauces and sauces that contain eggs or dairy, especially when combined with the other flavours in a burger. In fact, businesses could opt to make plant-based sauces the default for all their menu items. This makes operations easier and eliminates allergens from dairy and egg.

As the plant-based industry is continuing to grow, with consumers becoming increasingly accustomed to plant-based alternatives to animal-based meat, dairy, and eggs, fast-food chains should consider partnering with, or expanding partnerships with, the large number of food manufacturers and retailers that are starting to expand into the plant-based industry. By partnering with the right outlets and distributors, plant-based brands can substantially increase their impact – and sales.

Fast-food chains have a significant impact on norm-setting and consumer trends, making their adoption of plant-based offerings crucial for promoting plant-based eating on a larger scale. Particularly in the context of out-of-home dining, which is often viewed as a special treat or social occasion, there is a substantial opportunity for plant-based products to cater to mainstream consumers who are seeking to decrease their meat consumption. By embracing a plant-based ethos and targeting mainstream consumers, major fast-food chains can normalise and advance plant-based eating, which could in turn have compounding positive effects on sustainability and public health. This approach could serve as a core driver for both expanding their customer base and driving the popularity of plant-based options.

FUTURE RESEARCH

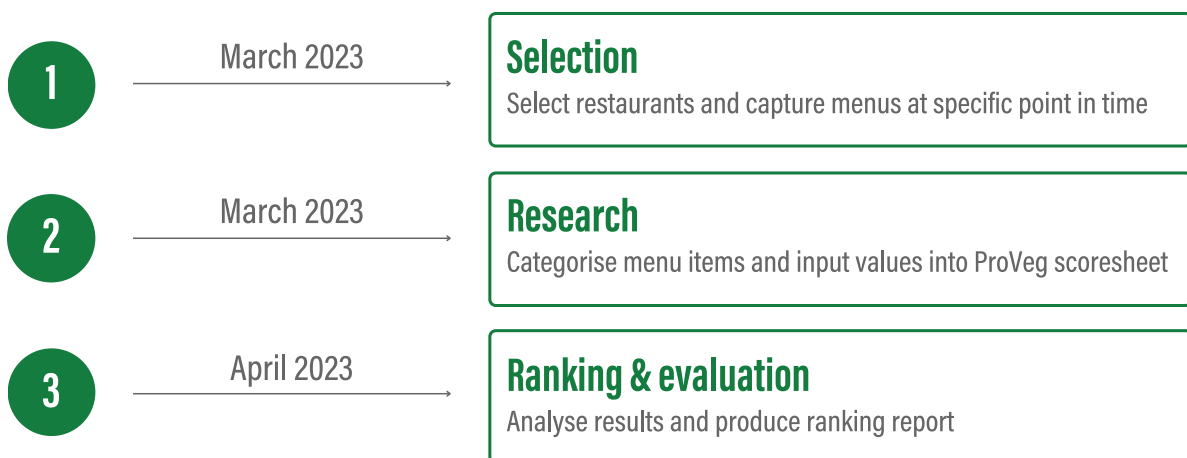
ProVeg will be releasing and updating fast-food restaurant rankings annually and we are constantly looking at ways to improve our processes and our methodology. We also publish rankings for other types of food services. Companies or organisations that are interested in collaborating on research can contact us at corporate@proveg.com.

METHODOLOGY

ProVeg analysed the results of this ranking based on a pre-defined methodology, which was used to help gather data, as well as categorise and score each of the fast-food restaurants' online menu offerings. The selection, as well as the research conducted, was also determined prior to the evaluation and ranking. Below, we provide a breakdown of the methodology used to assess and then rank the selected fast-food restaurants.

TIMEFRAME AND STAGES

The assessment method includes several areas of inspection and formulation. The following steps were taken:



SELECTION

The selection criteria were based on a specific type of outlet that serves food to customers in a packaged form for takeaway, with minimal table service available for sit-down. The fast-food chains were selected on the basis of total global revenue. These chains were confirmed to have a minimum number of owned or franchised operations in each country reviewed, with a standardised online menu of products and ingredients. If one of these chains had low to no availability in a country, they were omitted from the ranking or an appropriate fast-food chain substituted.

RESEARCH





ProVeg conducted the research required to perform the assessment using a standard collection process and ranking tool. All research was gathered and assessed by the ProVeg team. Research data collected from each fast-food company is publicly available via their online menus. We ensured compliance with the selection criteria by referencing the company websites.

RANKING & EVALUATION

Once the research was complete, a final tally was performed on the score of each restaurant in each country, using a comparison and ranking formula.

Our evaluation basis includes the standardised ranking criteria created by ProVeg. Our methodology is informed by ProVeg’s principles and by current evidence from research on choice architecture and nudging principles related to encouraging plant-based purchasing, particularly among mainstream consumers.

The following graph breaks down ProVeg’s Food Service scoring system.

| CATEGORY | DESCRIPTOR | POINTS |
|---|---------------------------------------|-----------|
|  MAINS | Total plant-based mains | 10 |
| | Plant-based percentage of mains | 5 |
|  SIDES | Total plant-based side dishes | 2 |
| | Plant-based percentage of side dishes | 1 |
|  DESSERTS | Total plant-based desserts | 2 |
| | Plant-based percentage of desserts | 1 |
|  MENU PRESENTATION | Label appeal | 2 |
| | Item integration | 2 |
| | Naming convention | 2 |
| | Positive descriptors | 1 |
| | Substitutions | 2 |
| | TOTAL POINTS: | 30 |

MAINS, SIDES, AND DESSERTS

The three food categories – mains, sides, and desserts – were identified as the common meal groups across all restaurants. The evaluation excludes special offers, promotional items, seasonal items, and items that are not available nationwide, instead focusing on the standard meal groups and permanent menu items.

Points were awarded for the total number of plant-based menu items in the mains, sides, and desserts categories. Points were also awarded in proportion to the percentage of plant-based items, compared to the total number of items in the mains, side dishes, and desserts categories. This means that a chain earns more points for replacing an animal-based menu item with a plant-based item than it does for simply adding a plant-based item. Out of the three categories scored, far more weight was given to main dishes.

MENU PRESENTATION

Scores in the following subcategories were based on how well plant-based menu items were visually presented. The rationale for awarding points for specific menu-presentation strategies is based on supporting research regarding the influence of choice architecture, particularly when it comes to plant-based food items and consumer favorability.^{27, 28, 29} Restaurants were awarded points for:

Item integration – points were awarded if the menu integrated plant-based main dishes with other main dishes in the menu.

Naming – points were awarded on a sliding scale, depending on how plant-based main dishes were named. Maximum points went to menus that chose creative names for plant-based main dishes that focus on flavour, culinary style, or branding, and that avoid words that suggest they are for niche consumer groups. A menu using a mixture of these naming strategies received half points in this sub-category.

Descriptors – a point was awarded if descriptions for plant-based main dishes included appealing words such as 'sizzling,' 'juicy,' 'original recipe,' 'chef's choice,' etc, highlighted an aspect of nutrition such as protein content, or identified sustainable aspects.

Substitutions – a point was awarded if the menu offered plant-based dips, toppings, dressing, or sauces. An additional point was awarded if the menu explicitly indicated that it is substitution-friendly or that customers can build their own main dishes, so long as there were substantial plant-based options available.

Labelling – points were also awarded for labelling practices and menu strategies that are favourable to plant-based menu items, especially in ways that are appealing to mainstream consumers.

The score for labelling is based on how well the plant-based menu items were identified in terms of accuracy and appeal. This ranking considers and scores labelling separately from how plant-based items are named on the menu.

The fewest points were awarded to menus whose plant-based items could only be identified by their ingredients lists. Menu items had to be clearly labelled with words like 'vegan' or 'plant based,' or represented with a recognisable symbol, in order to gain more points in this category. Maximum points for this category were given to menus that used a symbol or pictogram.

ProVeg recognises that identifying menu items suitable for vegan diets is important for fast-food menus in Europe in order to meet the needs of diverse customer bases and to promote transparency in their products.

V-label certification, for example, is important for fast-food menus because it helps consumers identify which items on the menu are suitable for vegans. Fast-food restaurants often have a wide variety of menu items, and without proper labelling it can be difficult for consumers to determine which ones are free of animal-based products. By using the V-label certification, fast-food restaurants can clearly indicate which items are vegan-friendly, making it easier for vegans and those following a plant-based diet to make informed choices.



More broadly, European consumers are aware of V-Label's existence, with 54% having bought a product with the V-Label symbol. Furthermore, 65% of European consumers know what the V-Label symbol means, leading to specific consumer behaviour, with 29% of people never checking the ingredients of a product when it is marked with the V-Label symbol, while 31% rarely do, indicating that V-Label is seen as a sign of trust. This consumer awareness and trust in the V-Label make it easier for consumers to purchase vegan/vegetarian products with confidence. In fact, 40% of European consumers are willing to pay a premium price for a product carrying the V-Label symbol, highlighting the perceived quality associated with it.³⁰

However, it is worth noting that there is ample consumer behavioural evidence suggesting that a highly visible vegan label often has a deterring effect on mainstream consumers.^{31, 32, 33} While proper labelling is crucial, it is also important to nudge mainstream consumers towards plant-based menu items. In this ranking, we aim to strike a balance by considering the need for proper labelling and the importance of appealing to mainstream consumers. Therefore, in the subcategory for labelling, menus that used a visible yet subtle labelling system to identify plant-based main dishes were awarded the most points. This approach ensures that vegan options are clearly labelled for those seeking them while avoiding potential deterrents for mainstream consumers.

For more information and insight into ProVeg's scoring system, please contact us at corporate@proveg.com.

DEFINITIONS & DISCLAIMER

Fast-food – popular food and beverages quickly supplied by commercial enterprises, eaten immediately, and affordably priced to meet customers' daily needs.

Animal-based – used to describe food products whose ingredients are sourced from animals.

Plant-based – used to describe food products whose ingredients are sourced from plants and do not include any animal parts or by-products.

Vegetarian – used to describe food products whose ingredients do not include animal-based meat but which may contain animal-based eggs, dairy, or ingredients derived from them.

Vegan – used to describe plant-based food products made and prepared without animal-based ingredients or animal by-products.



For the purposes of this ranking, a food product is still plant-based if it comes into contact with animal-based food during the cooking process, even though it may no longer be considered strictly vegan. Consumers identifying as vegan or vegetarian have varying preferences. While some avoid foods prepared on shared equipment, others are not concerned about cross-contamination.

ProVeg's assessment criteria do not examine the food-manufacturing, preparation, and handling processes to ensure that there is no possibility of cross-contamination with animal products. The assessment cannot thus be qualified as an explicitly 'vegan' ranking. For example, the ingredients of a burger that consist of plant-based ingredients, and which would otherwise be considered vegan, cannot be confirmed as vegan if it is cooked on the same grill as or deep-fried along with meat products. It is worth noting that the majority of consumers buying plant-based are mainstream consumers looking to reduce animal-based foods in their diets, and cross-contamination is not a relevant factor for them when ordering a plant-based option.

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