



THE STATE OF CULTIVATED MEAT 2022

**SuperMeat's Industry-First Survey to Assess
US-Based Chefs' Sentiment on Cultivated Meat**

METHODOLOGY

The research was conducted by Censuswide, an independent market research consultancy. The survey took place online with 251 chefs and/or food-service professionals in the US between 07.09.2022 - 20.09.2022. Censuswide abides by and employs members of the Market Research Society, which is based on the ESOMAR principles, and is a member of the British Polling Council.



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American Chefs are Betting on Cultivated Meat as the Holy Grail of Meat Alternatives

With meat alternatives on the rise, chefs eagerly await cultivated meat as a greener, healthier, and more sustainable option that will meet diners' demand for the taste and experience they love.

On The Horizon

With regulatory approval expected soon, followed by product commercialization in 2024, chefs may be serving this meat alternative to diners in under two years – and they are ready.

By 2040, 30% of worldwide meat consumption is expected to be sourced from cultivated meat. To prepare for this coming reality, many chefs are considering making cultivated meat part of their regular menu offerings.

Cultivated meat holds many advantages over traditional meat. The growth process uses far less land and water, creating less pollution; cultivated meat also poses less risk for foodborne illnesses; by virtue of being created in a controlled environment, cultivated meat tends to be more consistent as well, with higher quality and a longer shelf life.

SuperMeat, an Israel-based food-tech company, has been producing cultivated chicken with a nutritional and organoleptic profile comparable to conventionally produced chicken. With its proprietary technology, food companies can now source any type of meat tissue through cellular agriculture: from chicken breast to liver and thighs.



This process has the potential to provide chefs and their customers the full and complete experience they have been able to achieve so far only through using traditionally produced meat.

Following the opening of SuperMeat's first farm-to-fork facility "The Chicken," in Israel, SuperMeat hosted the world's first blind tasting event, demonstrating that cultivated chicken was virtually indistinguishable from traditionally sourced chicken.

Understanding chefs and restaurants are often the first to welcome new innovations on the market, SuperMeat conducted an industry-first survey to assess US-based chefs' sentiment on cultivated meat. They asked 251 chefs across United States, spanning fine dining to fast food, how likely they are to embrace cultivated meat once it becomes available.



Key Findings

There is a growing interest in cultivated meat among chefs

86% of chefs reported being open to serving their diners cultivated meat; Chefs in the Midwest had the most interest with 98% responding positively.

Meat alternatives are in high demand

65% of chefs have seen increased diner demand for meat alternatives in the last 5 years, particularly in the Midwest, where 87% of chefs reported this uptick.

New meat alternatives are being sought by chefs

84% and 80% of chefs would consider serving cultivated meat or poultry instead of traditional meat or meat alternatives, respectively, if the pricing were similar

High standards are expected of cultivated meat

46% said that the meat should cook the same as traditionally sourced meat, while 45% said they expect the meat to be nutritionally comparable, and 41% want it to taste the same.

Price is still the largest determinant of consideration

68% said that the greatest deterrent for introducing cultivated meat would be the price point; Nonetheless, 77% of chefs would be willing to pay a premium for cultivated meat for a first taste



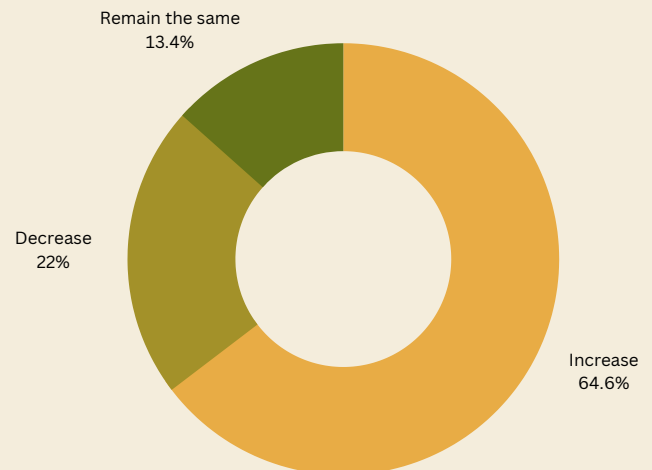
The Meat Alternative Payoffs: Why Cultivated Meat?

For many chefs, cultivated meat is an opportunity to offer greener and safer options without sacrificing the signature dishes they love. As alternatively sourced proteins have become staples in most food establishments - especially with the concurrent growth of vegetarianism and veganism and the demand for organically sourced ingredients - the goal of SuperMeat's cultivated meat is to provide a sustainable, quality option chefs can use to continue creating their signature dishes.

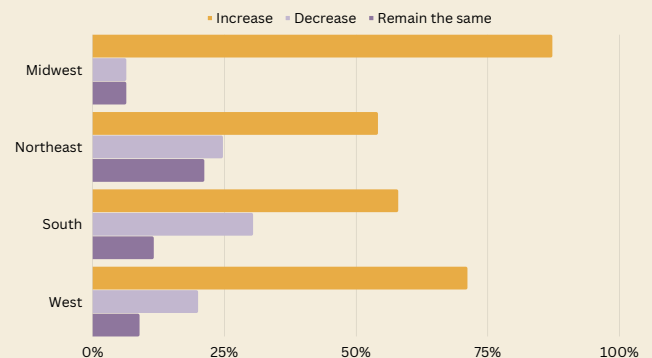
Over the last five years, 65% of chefs have seen an increase in diner demand for meat alternatives. The Midwest saw the most demand for meat alternatives, with 87% of chefs reporting a shift in their diners' requests - noteworthy as the Midwest is traditionally a region associated with higher meat consumption. The West saw the second highest change with 71% of chefs reporting a significant shift. The South, however, experienced less of a change with only 58% of chefs reporting a demand for meat alternatives, and the Northeast had the lowest reported shift with 54%.

When paired with a study done by the National Chicken Council, it becomes clear that meat consumption has continued to grow steadily over the past 60 years. This coupled with the rise of health awareness has naturally led to the growth of the meat alternative market.

Have you seen demand for these meat alternatives increase or decrease in the past five years specifically with your diners?



By Region

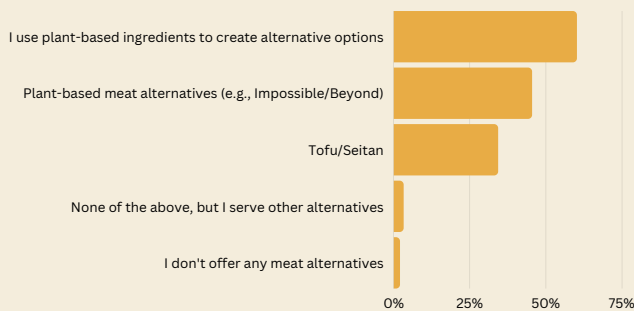


What's Cooking Today

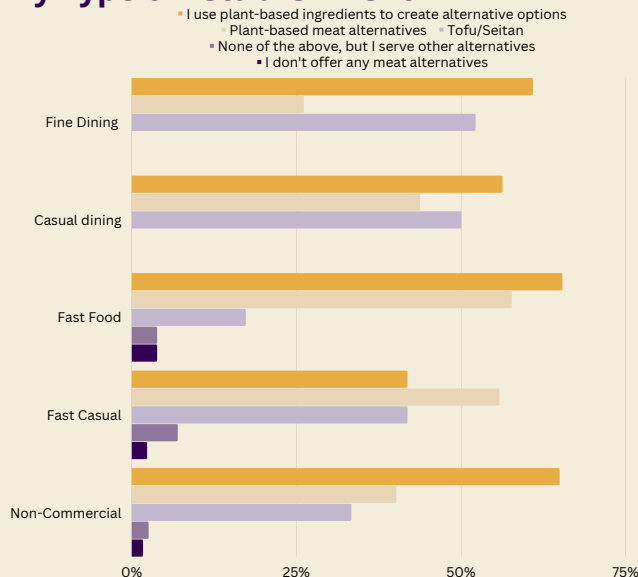
In an effort to provide meat alternatives, 60% of chefs use plant-based ingredients to create their own plant-based alternatives, while 45% of chefs turned to pre-prepared plant-based meat products, such as Beyond Meat or Impossible.

Do you currently offer any of the following meat alternatives on your menu?

Tick all that apply



By Type of Establishment



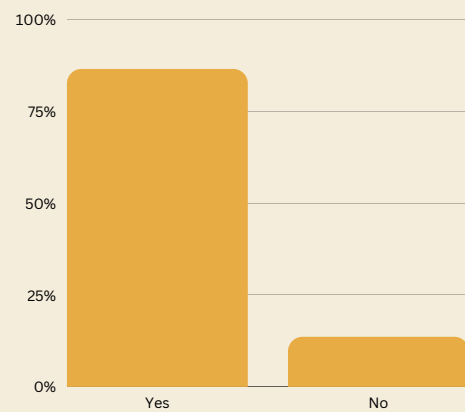
Menus are Waiting & Ready

When asked whether chefs would be willing to serve cultivated meat to their diners, a whopping 86% responded yes.

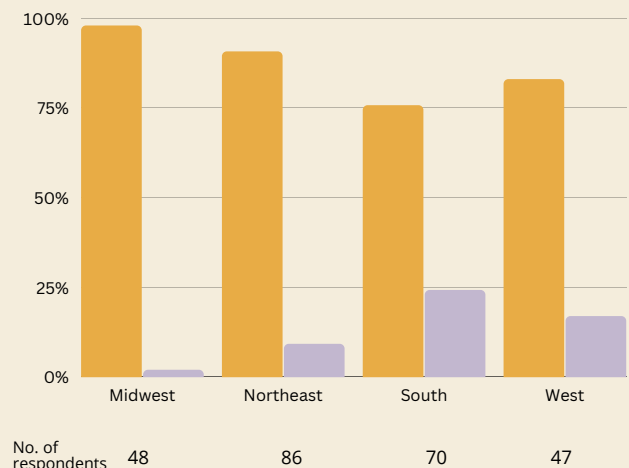
Of those 86%, chefs from the Midwest had the most interest in serving cultivated meat to diners, with 98% responding yes.

Even the “lowest” level of interest in the survey, by Southern chefs, was exceptionally high, with 76% of chefs responding positively.

Would you be interested in serving cultivated meat to your diners?



By Region



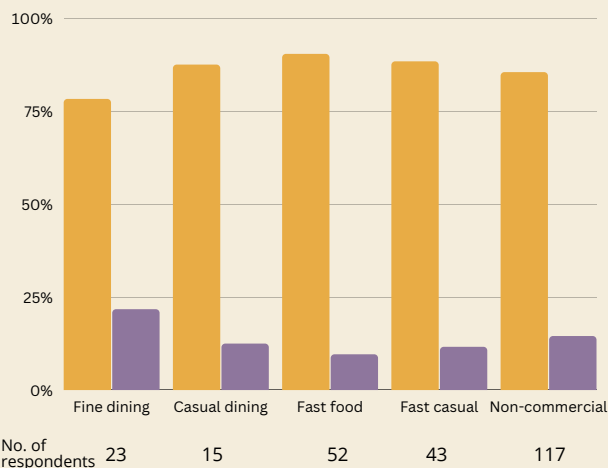
From the Drive-Thru to the Michelin Star

The type of dining establishment also played a role in how willing chefs were to serve cultivated meat. Fast-food and fast-casual chefs were very interested - 90% and 86% respectively.

The results may be so strong because of the longevity and safety of cultivated meat. In an industry where speed and availability are priorities, the easily sourced, long-lasting option is an attractive sell.

Fine dining chefs still responded positively, but at about 78%. For chefs who hold their food in high esteem, the risk of change in flavor or quality can be far too great. That said, when dealing with a diverse group of customers, having a “green-sourced” protein option can increase the customer base and provide opportunities to appeal to a more diverse crowd.

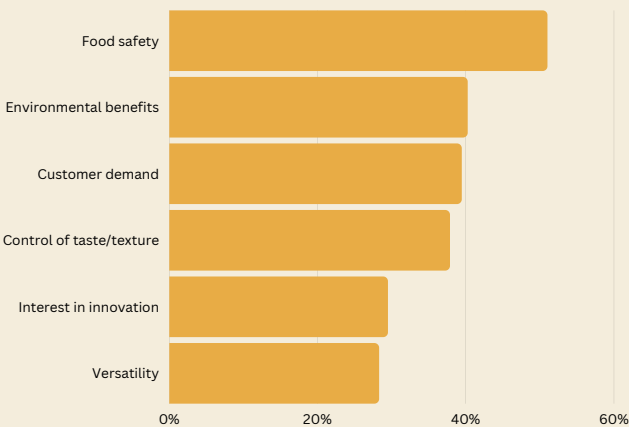
By Type of Establishment



The main motivator for chefs in considering cultivated meat varied similarly – while 51% of chefs noted food safety as their top motivator, we saw this increase to 60% when looking only at fast food establishments and non-commercial outlets.

What, if anything, would be your motivating factor(s) in serving cultivated meat or poultry?

Tick all that apply



And where environmental benefits, customer demand and control of taste and texture saw response rates between 28% and 40% when looking at the overall group, we saw a big jump to environmental benefits as the top reason (52%) for fine dining establishments.



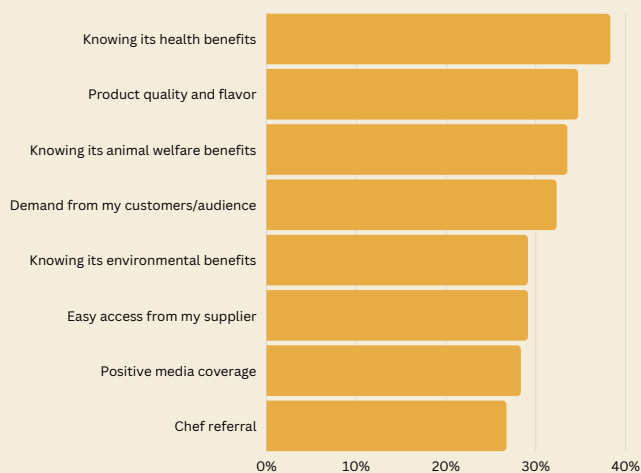


When asked what might motivate them to **try** cultivated meat **for the first time**, chefs from different dining establishments focused on different factors.

For fine dining establishments, customer demand and animal welfare were the most important factors, with 39% reporting those elements as their main motivators. However, fast food chefs felt that food quality and positive media coverage were more important.

What, if anything, would most motivate you to purchase cultivated meat or poultry for the 1st time?

*Select up to three



Demand & Animal Welfare

are main motivators
according to

**39% of Fine Dining
Restaurants**



Quality & Media Coverage

Is the main motivator
according to

**42% of Fast Food
Restaurants**



Health Benefits

Is the main motivator
according to

**50% of Casual Dining
Restaurants**



Tastes Like Chicken

Not all cultivated meats are the same, though. When asked what type of cultivated meat they were most interested in cooking, chefs showed the most interest in cultivated poultry – in fact, 51% chose poultry as their protein of choice, followed by beef with 38%. Pork, seafood, and exotic meats all came in at 35% respectively.

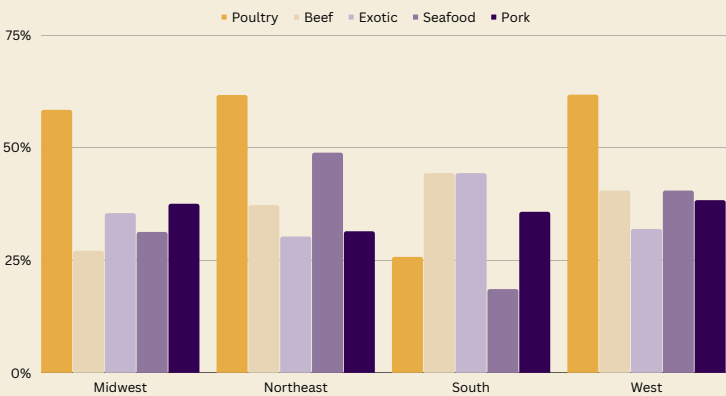
In addition, 22% of chefs claimed to be "very interested" in cooking cultivated poultry, while 59% responded they were "interested." However, this statistic was affected by location, with a significantly different response rate in the South - 44% of chefs in the South were interested in beef and exotic proteins, and only 26% selected poultry.

Which, if any, type of cultivated meat are you open to trying?

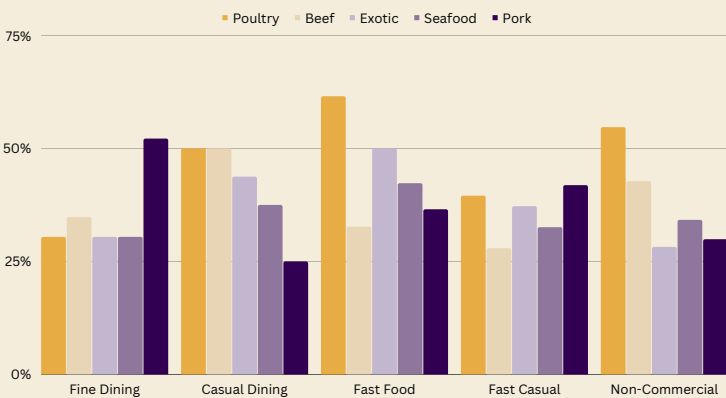
Tick all that apply



By Region



By Type of Establishment

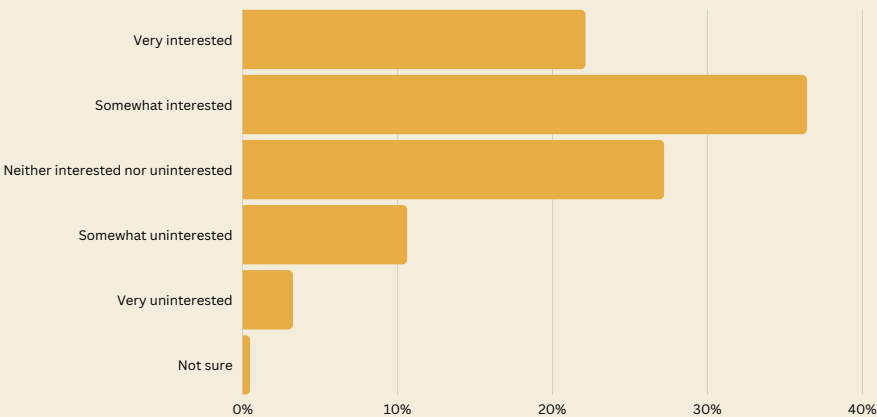


Additionally, chefs differed on what form of cultivated meat they were most interested in serving. The majority of chefs (63%) preferred some sort of pre-prepared option like sausages or patties; 59% wanted to serve ground meat or poultry; and 58% responded that they wanted to serve whole cuts.

How interested or uninterested would you be in serving the following cultivated meat and poultry

*those interested in serving cultivated meat or poultry (217 responders)

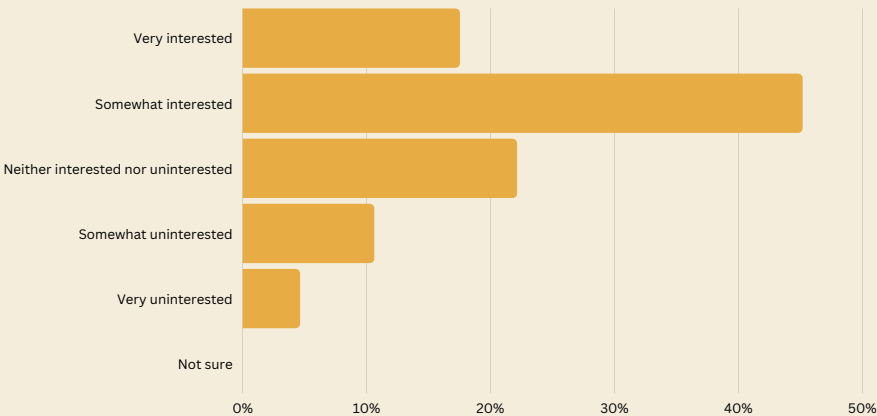
Ground Meat and Poultry



59%
of chefs

are interested in serving **ground meat and poultry**

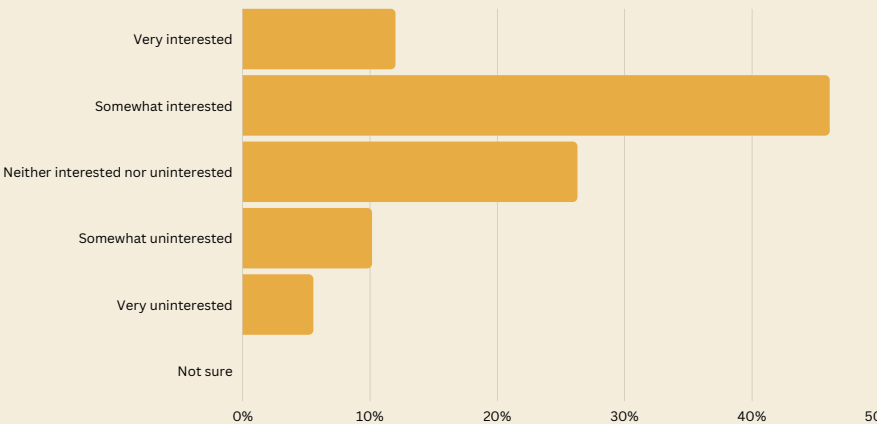
Partially pre-prepared options (e.g., patties, sausages, etc.)



63%
of chefs

are interested in serving **partially pre-prepared options**

Whole Cuts



58%
of chefs

are interested in serving **whole cuts**



What's Needed for Change?

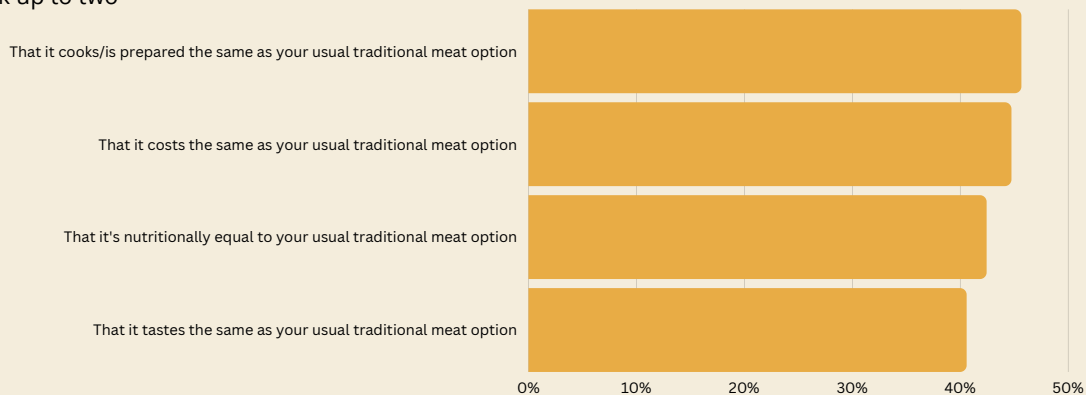
Chefs were also asked what attributes they would need to consider before using cultivated meat. Similarity reigned – 46% agreed the most important aspect would be that the meat cooked the same as traditionally sourced meat, while 45% responded that they required the meat to be nutritionally comparable, and 41% needed the taste to be the same.

What's clear is that if chefs are looking for a new meat alternative, expectations are high that it will truly be a replica for the traditional meat products they are accustomed to – and offer a real differentiator from current plant-based alternative options.

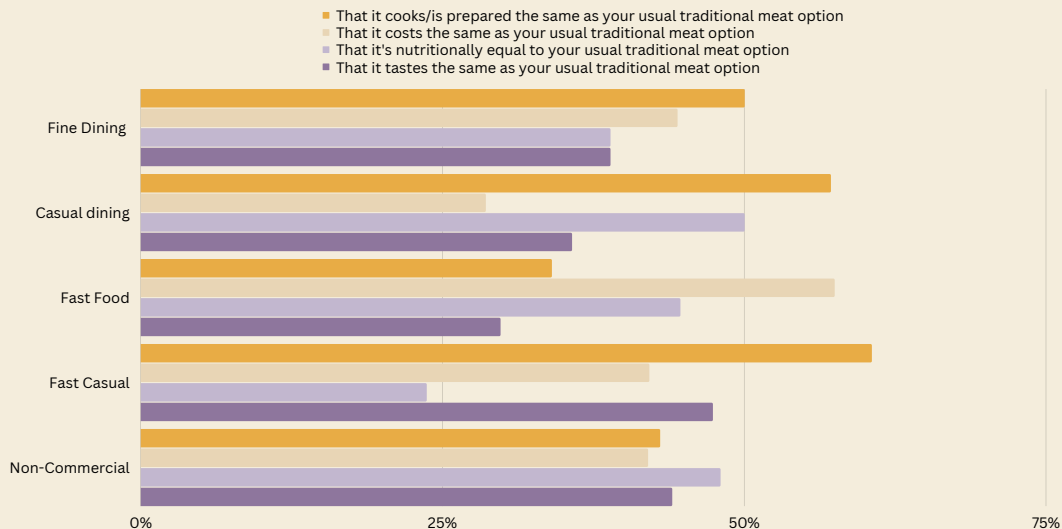


If you're interested in serving cultivated meat or poultry, which, if any, of the following attributes do you prioritize most?

*Please tick up to two



By Type of Establishment

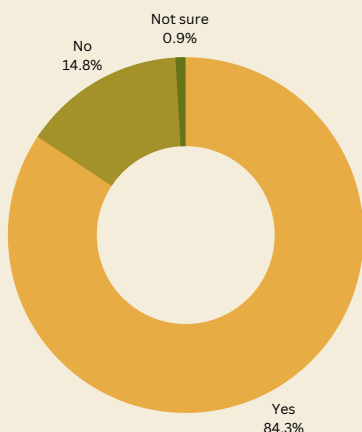


Price Is King

When it comes down to it, especially with food costs soaring, price is still the largest determinant of consideration, with 84% of chefs saying they would consider replacing traditional meat with cultivated meat and 80% would consider replacing meat alternatives if the two items were priced similarly.

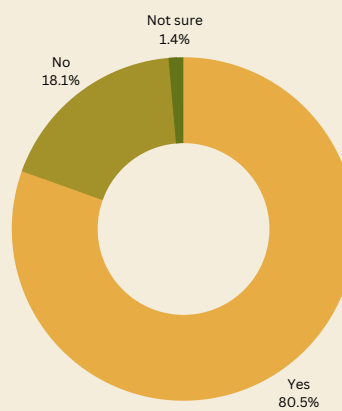
If priced similarly, would you consider cultivated meat or poultry in place of **traditional meat** options on your menu?

*Those interested in serving cultivated meat or poultry (217 responders)

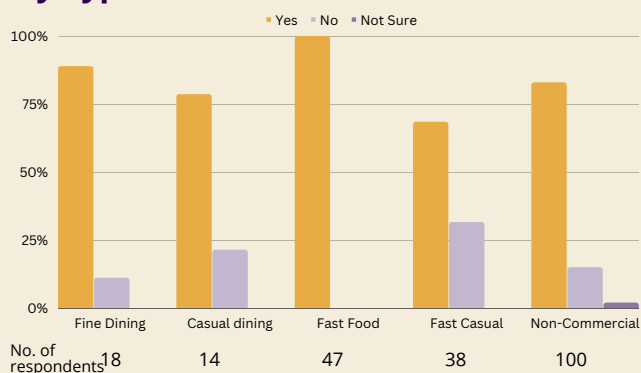


If priced similarly, would you consider cultivated meat or poultry in place of **meat alternatives** currently used on your menu?

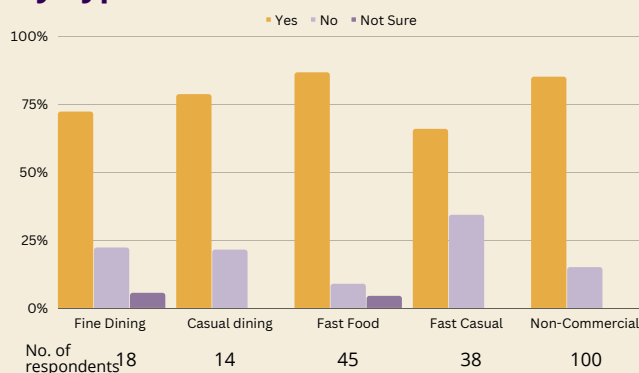
*Those interested in serving cultivated meat or poultry and who offer meat alternatives (215 responders)



By Type of Establishment



By Type of Establishment



What, if anything, would make you NOT consider trying cultivated meat?

Tick all that apply



High cost | 68%



Taste/texture | 44%



Concerns about lab-grown meat | 35%



Versatility in usual menu items | 32%



Lack of interest from consumers | 29%



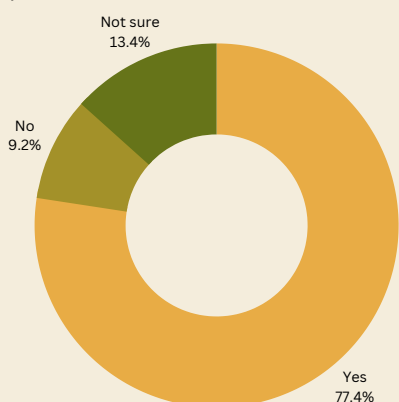


But, Many Are Willing to Pay Some Premium for a First Taste

Once having a clear understanding of the benefits of cultivated meat, 77% of chefs reported being willing to pay a premium price for the product. Specifically in the Midwest, 87% of chefs responded they'd be open to paying extra for cultivated protein.

Would you be willing to pay a premium to include cultivated meat on your menu, understanding its potential benefits?

*Those interested in serving cultivated meat or poultry (217 responders)



Meanwhile, 66% of all chefs reported a willingness to pay a premium of 11-15%. Chefs in the West, however, were willing to pay the highest premium, with 16% saying they would pay between a 16-20% markup.

How much of a premium over your usual costs would you be willing to pay?

*Those interested in serving cultivated meat or poultry and are willing to pay a premium to include cultivated meat and poultry on their menu (168 responders)

27% are willing to pay **5-10%** premium over the usual cost

66% are willing to pay **11-15%** premium over the usual cost

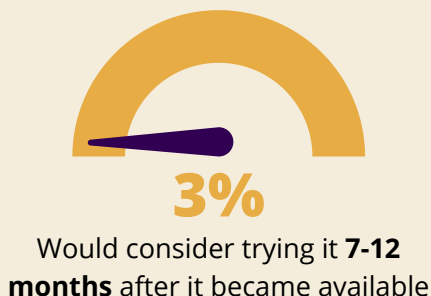
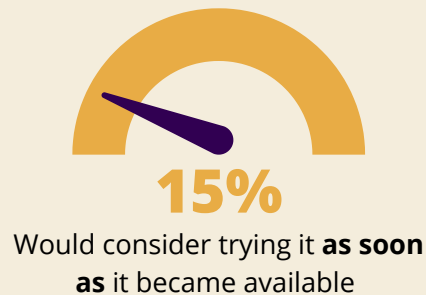
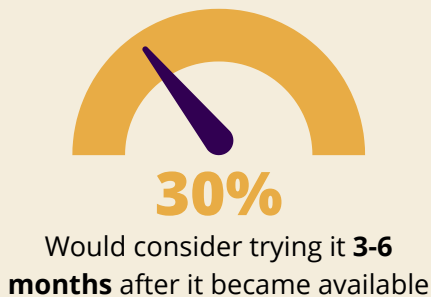
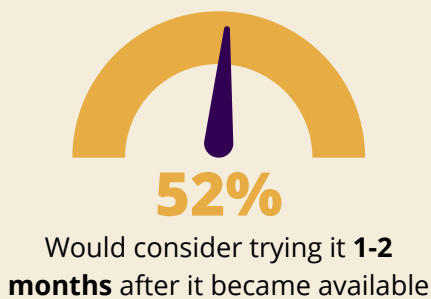
6% are willing to pay **16-20%** premium over the usual cost



How Soon Will It Hit Menus?

Results show chefs are ready for new innovations, with 52% of chefs reporting being willing to add cultivated meat to their menu 1-2 months after it became available. Moreover, 15% said they would add it immediately upon release, and 30% said they'd wait 3-6 months.

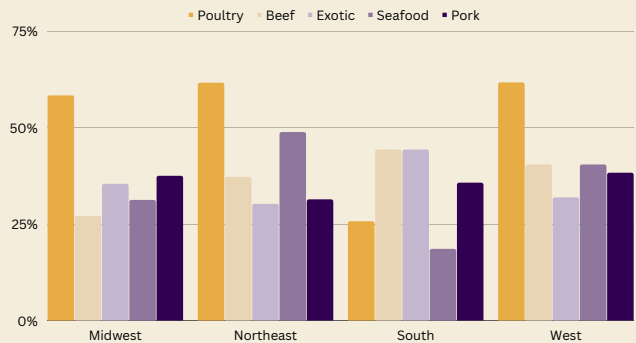
How long do you think it would take to add cultivated meat options into your menu if you chose to?



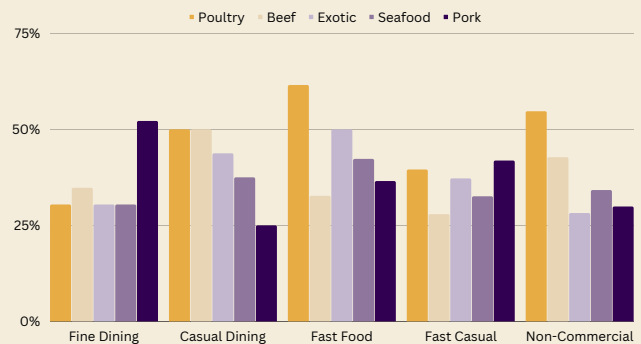
In the West and Northeast, however, chefs are likely to adapt it much more quickly, with 23% and 21% respectively saying they would add cultivated to their menus as soon as it became available.

With general acceptance around plant-based and meat alternatives higher than ever, the floodgates have opened and chefs appear more willing to adapt new innovations and options than ever before.

By Region



By Type of Establishment



Conclusion

With consumer demand for “green” options growing, chefs are looking for new ways to serve their customers without sacrificing their favorite dishes. Cultivated meat is just that. Nutritional, safe and great tasting, cultivated meat is an environmentally friendly way for meat to hit diners’ plates.





About SuperMeat

SuperMeat, a Tel Aviv-based food-tech company, is working to supply the world with high-quality meat grown from animal cells. The company's products offer a delicious meat experience and a high-quality nutritional profile, while being manufactured in a sustainable, slaughter-free, and GMO-free way.

SuperMeat has developed a proprietary cultivated meat platform based on stem cells that can mature into multiple cell types. Through its platform, SuperMeat can grow any type of meat tissue, from fat to muscle, using standard and scalable fermentation processes, making its production processes efficient and cost-effective.

The company has been showcasing the versatility of its meat platform in various events at its pilot production plant, The Chicken, the world's first farm-to-fork facility for local meat production.

SuperMeat is on a mission to provide sustainable, customized, fresh and cost-efficient cultivated meat to chefs and diners everywhere.

