

# Plant-based meat is set to soar in South East Asia





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From Asia to the world,  
plant-based goes global



# Asia is the birth place of alternative meats

Asian consumers have grown up with mock meats due to cultural and religious practices and are familiar with the common ingredients of soy and wheat in alternative proteins.



## China

Mock meats like Tofu were introduced in the time of the Tang dynasty (ad618-907) due to religion and are mostly soy or wheat based.



## Indonesia

Tempeh, a traditional fermented soy-based food originated from Java Indonesia as part of a local staple that is still widely consumed in both East and West.



## Japan

Soy milk is traditionally used to make yuba which is the by-product of boiled soy milk. It can be easily added to soups and hot pots or used to make dumplings.



# Plant based alternatives will continue to grow for other reasons

Beyond cultural and religious practices socio-economic and safety reasons will push consumers to seek less meat in their diets.

## PRICE

# +85.7%

pork price increase in China  
year-on-year at July 2020

## FOOD SAFETY

# BAN

on imports of pig from  
Indonesia to Malaysia due to  
reported outbreak of African  
Swine Fever

## DISEASE

# 59%

of Vietnamese consumers  
and 56% of Filipino  
consumers agree that the  
COVID-19 pandemic proves  
that humans need to eat  
fewer animals

Base: 1000 internet users aged 18+  
Source: FAO; SCMP; Rakuten Insight/Mintel





# Modern plant-based meat enters Asia through food service

Originally plant-based meat was trialed in restaurants but in May 2021, 7-Eleven began selling the Impossible Burger in Singapore for SGD \$5.90 in 300 stores Island wide.



## 2015: Beyond Meat, Hong Kong

Beyond Meat was first distributed by social enterprise Green Monday in Hong Kong.



## 2018: Omnipork, Hong Kong

Omnipork, the first modern plant-based meat APAC based company, is developed by OmniFoods, a food tech company launched by Green Monday.



## 2019: Impossible Burger, Singapore

Impossible Burger launched 1 year earlier in Hong Kong and subsequently introduced in Singapore in Lau Pa Sat.

Source: Beyondmeat; Omnifoods, Impossiblefoods facebook



## Understanding the plant based consumer





# The case for plant-based eating is multifaceted

## HEALTH AND WELLNESS

Consumers better understand how healthy eating can impact their physical and mental health.

## ETHICS AND ENVIRONMENT

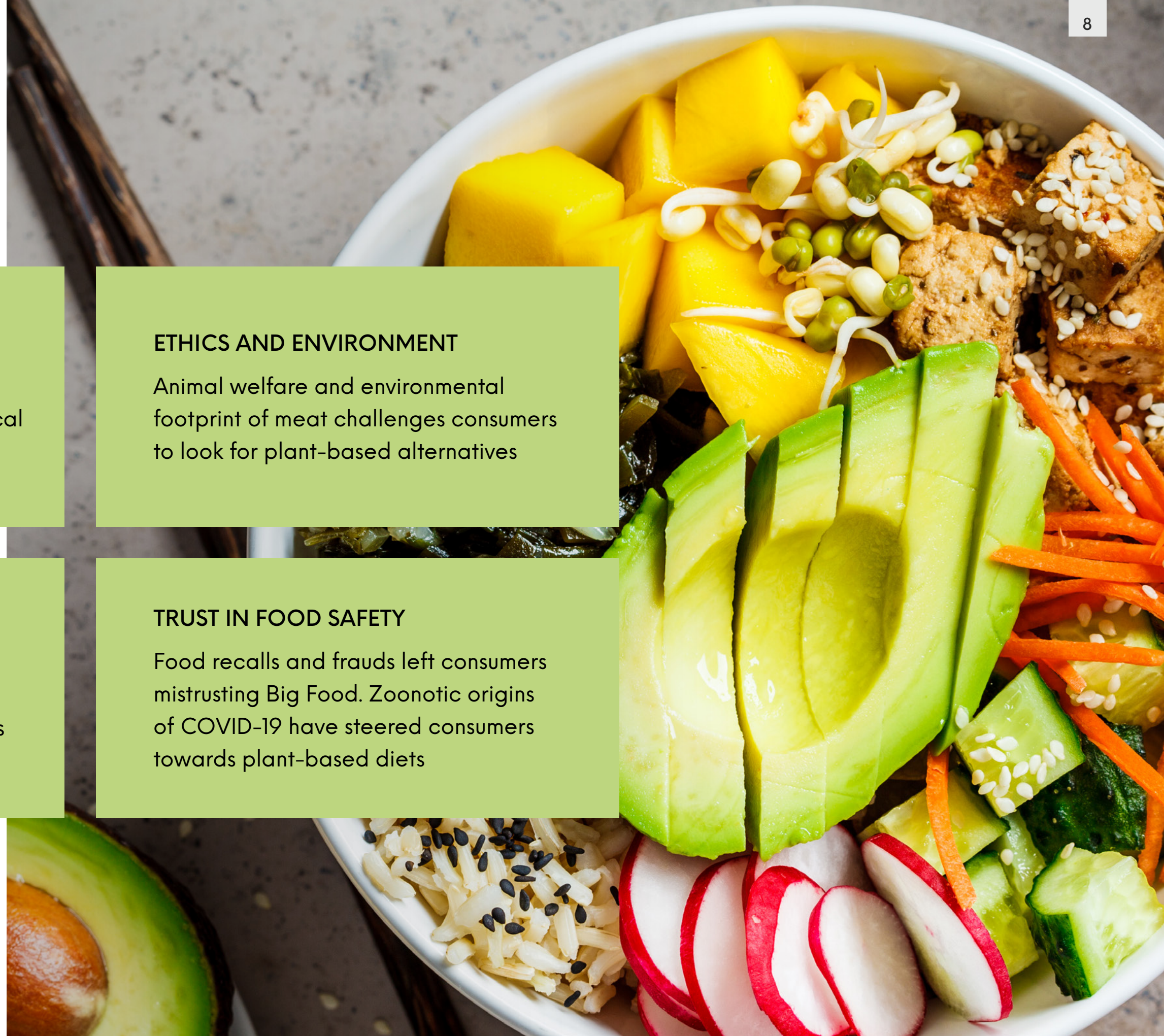
Animal welfare and environmental footprint of meat challenges consumers to look for plant-based alternatives

## ADDRESSING GLOBAL RESOURCE CONSTRAINTS

The challenge of feeding 10 billion people by 2050 is disrupting the status quo of food production.

## TRUST IN FOOD SAFETY

Food recalls and frauds left consumers mistrusting Big Food. Zoonotic origins of COVID-19 have steered consumers towards plant-based diets





# Tap into Thai consumer motivations for eating plant-based foods

When asked to rate which reasons are important in motivating them to eat foods of plant origin; health, the environment and animal welfare all rated highly.

FOR IMPROVED HEALTH

# 91%

of Thai consumers believe improving overall physical health is important

FOR THE ENVIRONMENT

# 82%

of Thai consumers believe helping the environment is important

FOR ANIMAL WELFARE

# 75%

of Thai consumers believe reducing animals killed for food is important

Base: 1,469 TH internet users aged 18+ who are interested in adding more plant based foods and/or plant based meats into their diet in the next 3 months  
Source: Dynata/Mintel





# Cater to the spectrum of plant-based meat consumers

Different business strategies are required to address distinctive needs of each segment.

## Four Thai consumer segments based on attitudes towards plant-based meat



THE INERT



THE FANS



THE SCEPTICS



THE MEATATARIANS



## The Inert are not ready for plant based meat

Who they are:

- Low income

Attitudes towards plant-based diet:

- Low interest
- Lack of knowledge
- Not convinced

## The Fans are the plant-based cheer squad

Who they are:

- Middle-high income

Attitudes towards plant-based diet:

- Trust health benefits
- Overtly positive
- Highest market potential





## Attract 'the fans' with versatile, nutritious and local formats

Fans also relate to the term 'flexitarian' and not the more strongly defined vegetarian or vegan descriptions.



### Hero vegetable content

Broccoli Burgers is 100% plant-based, and will appeal to working parents (the Fans) who want an easy way to increase their vegetable intake. (Germany)



### Facilitate home cooking

Organic Vegan Red Thai Curry highlights protein rich and low carbon footprint and encourages home cooking with plant based meat. (Germany)



### Celebrate local formats

Chickenless Money Bags This product is in a familiar local format (not western burger patty). Containing chickenless mince, fried crunchy cabbage, onions, coriander and shallots and can be served with a favourite Asian sauce. (Australia)



## The Sceptics need more evidence and seek better value

Who they are:

- Young low income

Attitudes towards plant-based diet:

- Positive but cautious
- Price sensitive
- Future-focused environmental advocates
- Potential future consumers





## Attract the Sceptics by focusing on protein quality, wellness support and whole food



### Good source of protein, iron & B12

Meet Positively Plant Based Tenders are a source of fibre and a good source of protein, iron and vitamin B12 (Australia).



### Vitamin D and Lutein for eye health

Lutein Added Black Soy Milk contains 2.5mg of lutein/serving. It is high in calcium and vitamin D and is enriched with five vitamin Bs (South Korea).



### High protein & whole food ingredients

Amazin' Graze Goodness in a Bowl Chocolate Banana Flavoured High Protein Instant Oatmeal provides 12g of protein per serving, is infused with non-GMO soy protein isolate and packed with superfoods for greater strength (Malaysia).



# The Meatarians want quality protein and uncompromised taste

Who they are:

- Tight-struggling income

Attitudes towards plant-based diet:

- Like meat taste and nutrition
- Poor value
- Adventurous eaters



## Focus on making mouth-watering claims for authentic taste appeal

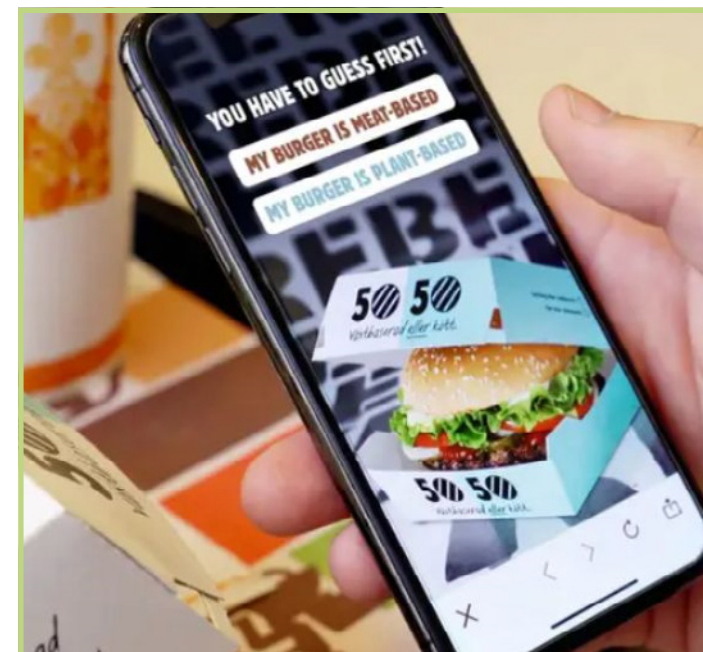


Beyond Meat maintains strong communications on its guaranteed juicy, meaty and delicious taste. It claims to have a 'taste so rich and texture so meaty, you won't believe it's made from plants'.

To ensure product visibility to the meat-loving shoppers, Beyond Meat also positions its products at the meat aisle instead of at the vegetarian zone.

Source: Beyond Meat

## Challenge Meatarians into trials of plant-based meat burgers



Source: Insider

Plant-based foods that can closely imitate meat are making it easier for consumers to choose eco-friendly options without feeling like they are giving up their favourite foods.

To support its new plant-based burger launch (Rebel Whopper and Rebel Chicken King) in 2019, for instance, Burger King Sweden introduced a new 50/50 mystery menu.

Customers order a Whopper without knowing whether it will be a meat or plant-based burger.



## Next steps for plant-based protein





# Address meat alternatives 'processed food' stigma

OVER PROCESSED

# 55%

of Thai consumers  
believe plant-based meat  
alternatives are  
overly processed



Earth Grown Meatless Mince (Australia)

"Unsure which artificial ingredients go into these plant based meats. Seem to have a lot of ingredients with numbers and feel they are marketed as 'healthy' but definitely more in them than vegetables. Only eat a little red meat so prefer natural."

Female, Queensland, 55+



# Beyond 'added protein' plant-based alternatives can link to the protein quality in animal products

Thai consumers hold positive perceptions towards protein for muscle building, energy and immunity support. Link plant based protein to associations with animal protein.



## 'Contains all essential amino acids'

Califia Farms Unsweetened Vanilla Übermilk. Contains 8g plant protein, all essential amino acids and a complementary blend of oat, pea and sunflower proteins (US).



## 'A natural source of iron'

Nestlé Kök Incredibly Meatless Incredible Mince. This vegan soy mince is made from plant-based ingredients and is described as being high in protein and a natural source of iron (Sweden).



## 'Contains added vitamin B12'

Lidl My Best Veggie Vegetarian Meatballs. Based on soy and wheat protein. Contains added iron and vitamin B12, is rich in fibre, and is high in protein (Spain).

Base: 1,500 TH internet users aged 18+  
Source: Dynata/Mintel



# Zoonotic diseases will stimulate consumers appetite for cleaner plant-based alternatives

African Swine flu decimated the world's pig population and COVID-19 heightened the concerns of exotic and crowded animal cultivation. Plant-based meats are viable alternatives



Al Fresco original Fully Cooked Uncured Chicken Bacon (Costa Rica)



Sophie's Lightly Seasoned Prawns (Australia)





## Asia champions the future of meat





# Supernature

Science will increasingly augment nature to provide new sources of food and ingredients. It will also reveal how the most progressive brands are already starting to offer their customers – and explain to them – new synthetic and scientific solutions.

SCIENCE IS THE SOLUTION

# 45%

of South Korea consumers and 33% of Thai consumers agree that science can provide solutions to the climate crisis

Base: 500 KR &TH internet users aged 16/18+  
Source: Dynata/Mintel





# 'Clean meat' offers sustainable solutions but is not without controversy

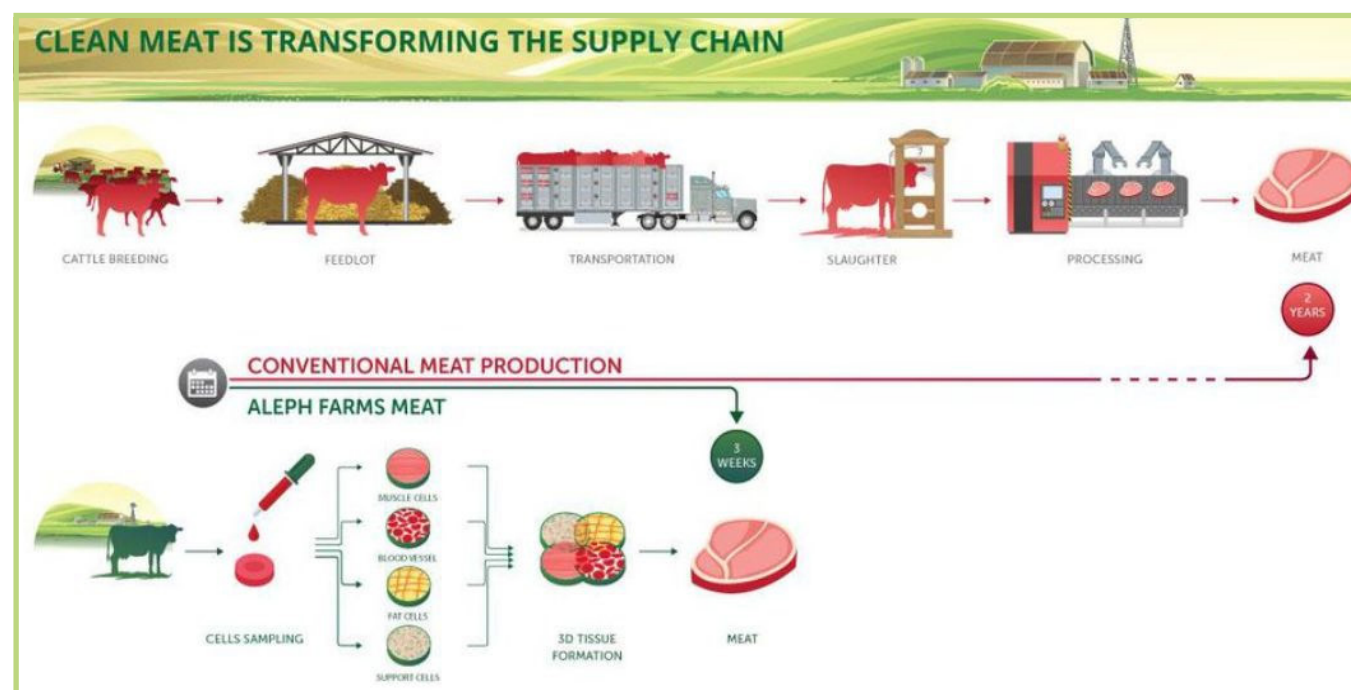
Who they are:

- animal welfare issues,
- antibiotic traces and resistance
- environmental impact.

But confronts consumers with concerns over:

- Petri-dish meat
- Not animal free
- controversy surrounding starter cells

Source: Aleph Farms





## Regulations will accelerate cell based protein in Asia

Food security issues due to population size and limited land for animal husbandry have lead to Singapore's 30% by 2030 initiative including cell based protein.



Chinese Academy of Engineering Biological Development Strategy for Meat Cultivation.

Source: The Beijing News



Singapore Food Agency regulations for cultivated meat

For the full report, please email us at: [infoasia@intel.com](mailto:infoasia@intel.com).





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