



Decoding demand

The appetite for alternative proteins in Southeast Asia

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Conducted in partnership with Good Growth





Headquartered in Singapore, the **Good Food Institute APAC (GFI APAC)** is part of a network of leading alternative protein think tanks working to accelerate the shift towards a more secure, sustainable, and just food system.

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**Science and
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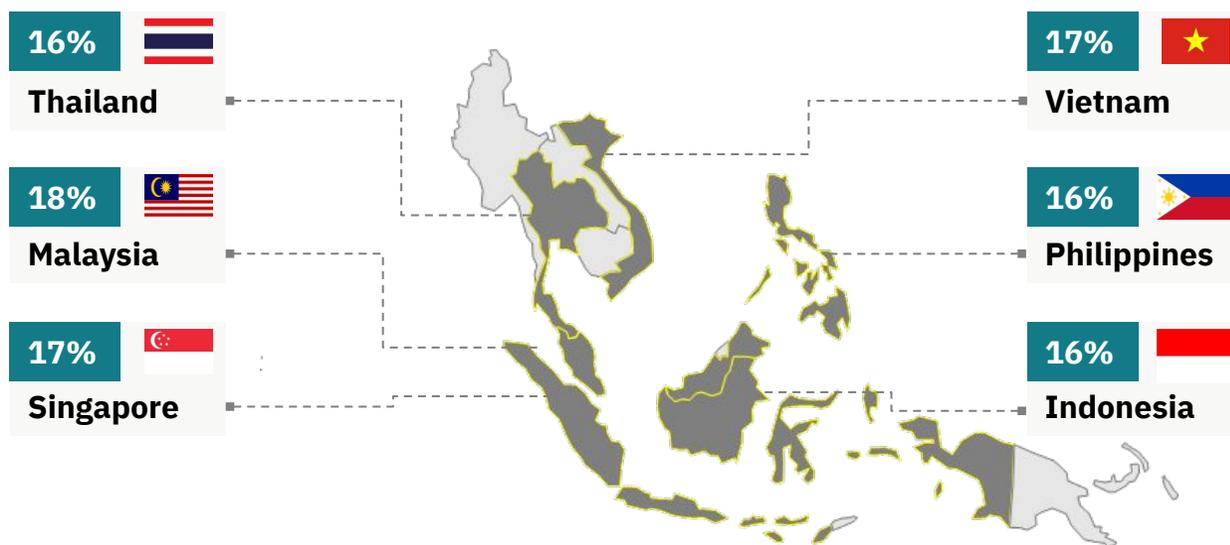
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Blended meat trial interest

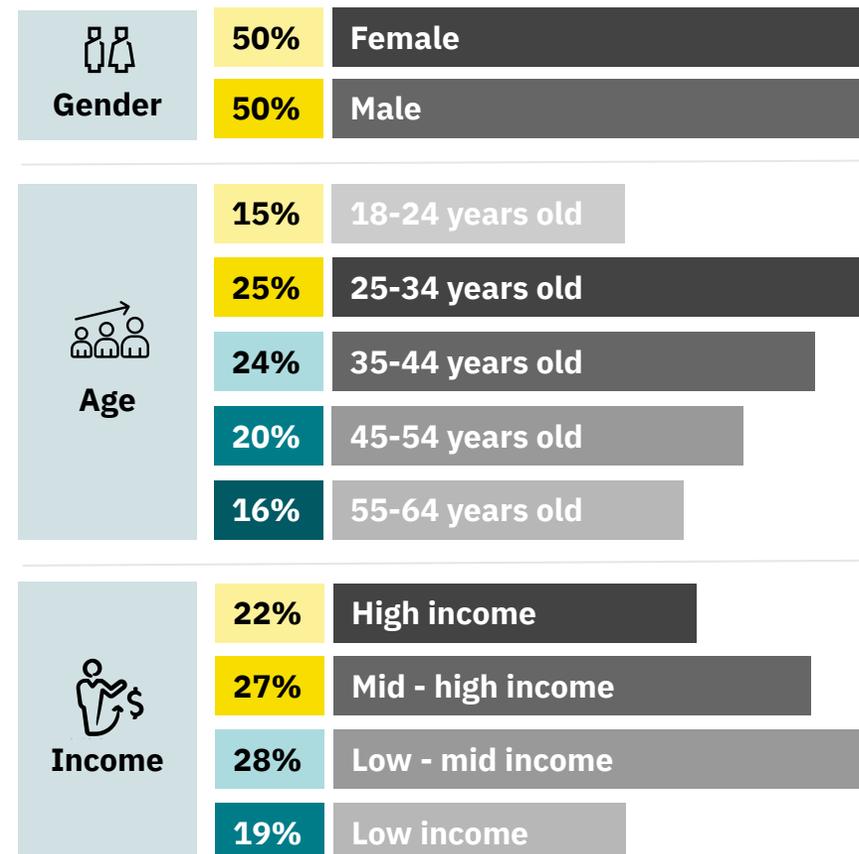
We surveyed consumers in six countries

Countries included in the study



5,971 participants* | Online survey | Focus group discussions

Sample distribution



*Note: Respondents were predominantly based in capital cities of their respective countries (except with the addition of Ho Chi Minh City in Vietnam.)

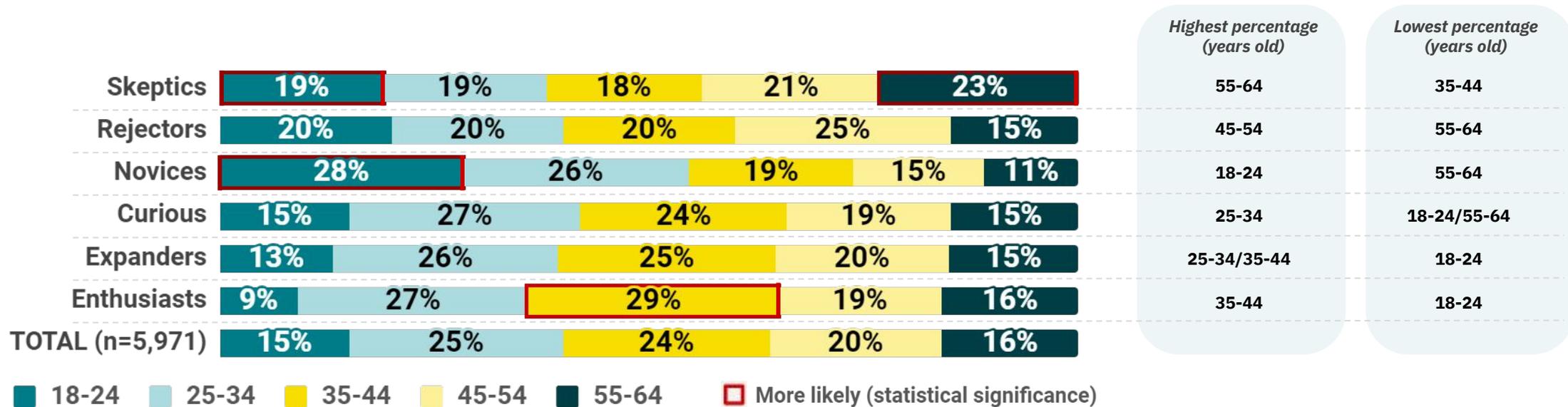
SOUTHEAST ASIA: A DEEP DIVE INTO CONSUMER SEGMENTS

Based on levels of awareness, trial, and intended future consumption of plant-based meat, the respondents have been grouped into six segments.

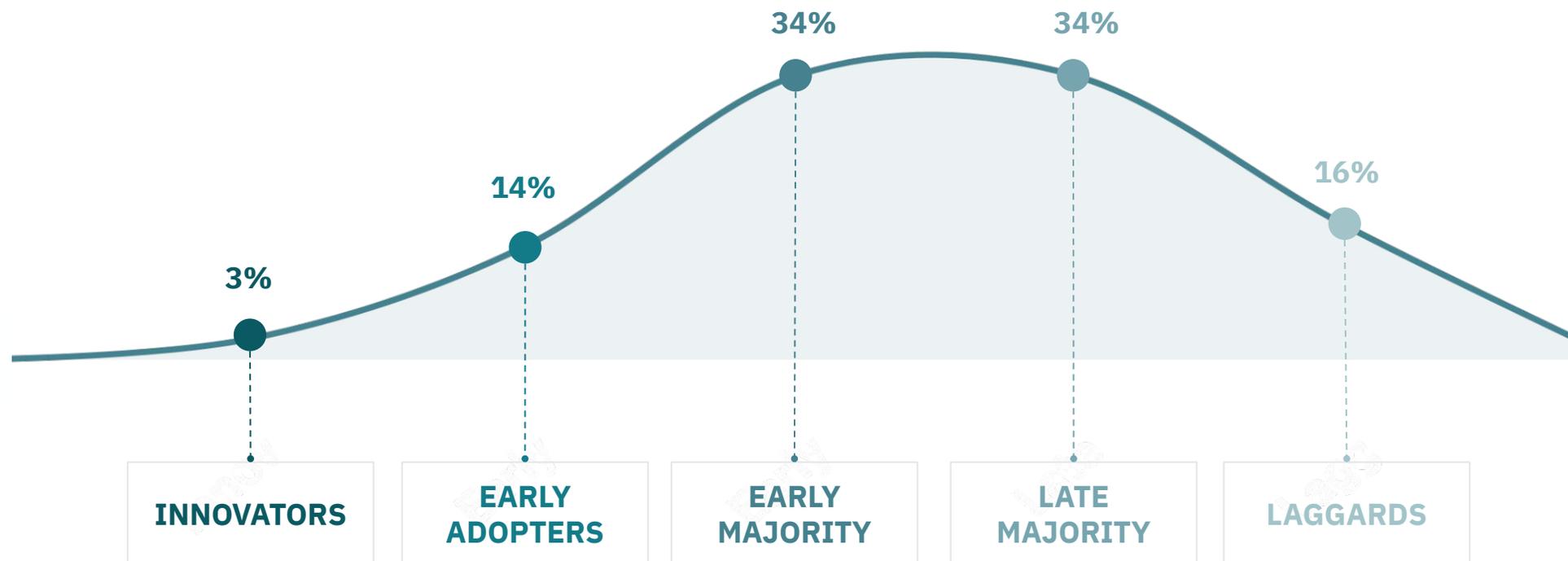
	Heard of plant-based meat	Tried plant-based meat	Intended plant-based meat consumption	Most common location	Monthly income	Gender and age	Meat habits	Consumption modalities	Activity levels	Main motivators	Main barriers	Taste perception	Willingness to pay
												<input type="checkbox"/> Good <input type="checkbox"/> Bad	<input type="checkbox"/> Same price <input type="checkbox"/> 20% premium <input type="checkbox"/> 50% premium
Enthusiasts 		 current consumers		Thailand	↑ higher	equal M/F ↑ 35-44 (29%) ↓ 18-24 (9%)	↑ highest frequency ↑ want to eat more	↑ cook, get takeaway, eat ready- to-eat meals, eat out	↑ moderate to high (70%)	health environment animals / taste	affordability nutrition variety	46% 5% 49% did not indicate	76% 67% 56%
Expanders 			same or more	Singapore	↑ higher	equal M/F ↑ 25-44 (51%) ↓ 18-24 (13%)	↑ higher frequency	↓ eat out	↑ light to moderate (86%)	health animals environment	affordability nutrition taste (better)	42% 8% 50% did not indicate	66% 51% 38%
Curious 			 likely to try	Vietnam	○ mixed	equal M/F ↑ 25-44 (51%)	↑ reducing red meat	↓ eat out, get takeaway	↑ light (46%)	health taste affordability	affordability nutrition taste (better)	41% 6% 53% did not indicate	69% 49% 34%
Novices 			mixed responses	Indonesia Malaysia	↓ higher	equal M/F ↑ 18-34 (54%)	↑ reducing red meat	↑ someone else cooks, eat ready- to-eat meals	↑ not active to light (67%)	health taste affordability	nutrition affordability taste (better)	31% 10% 59% did not indicate	55% 34% 24%
Rejectors 				Singapore	↓ higher	equal M/F ↑ 45-54 (25%)	↑ reducing red meat	↓ cook, get takeaway, eat ready- to-eat meals	↑ light to moderate (82%)	health environment animals	affordability taste (better) nutrition	26% 15% 59% did not indicate	32% 24% 17%
Skeptics 				Singapore	↓ higher	equal M/F ↑ 55-64 (23%) ↑ 18-24 (19%)	↓ higher frequency ↑ reducing red meat	↓ eat out, eat ready- to-eat meals	↑ not active to light (63%)	taste affordability health	affordability taste (better) nutrition	14% 15% 71% did not indicate	26% 15% 8%

More than half of *Enthusiasts* are aged 25-44

Consumer segments by age



New innovations and ideas are adopted in stages



We can map the study segments against this curve

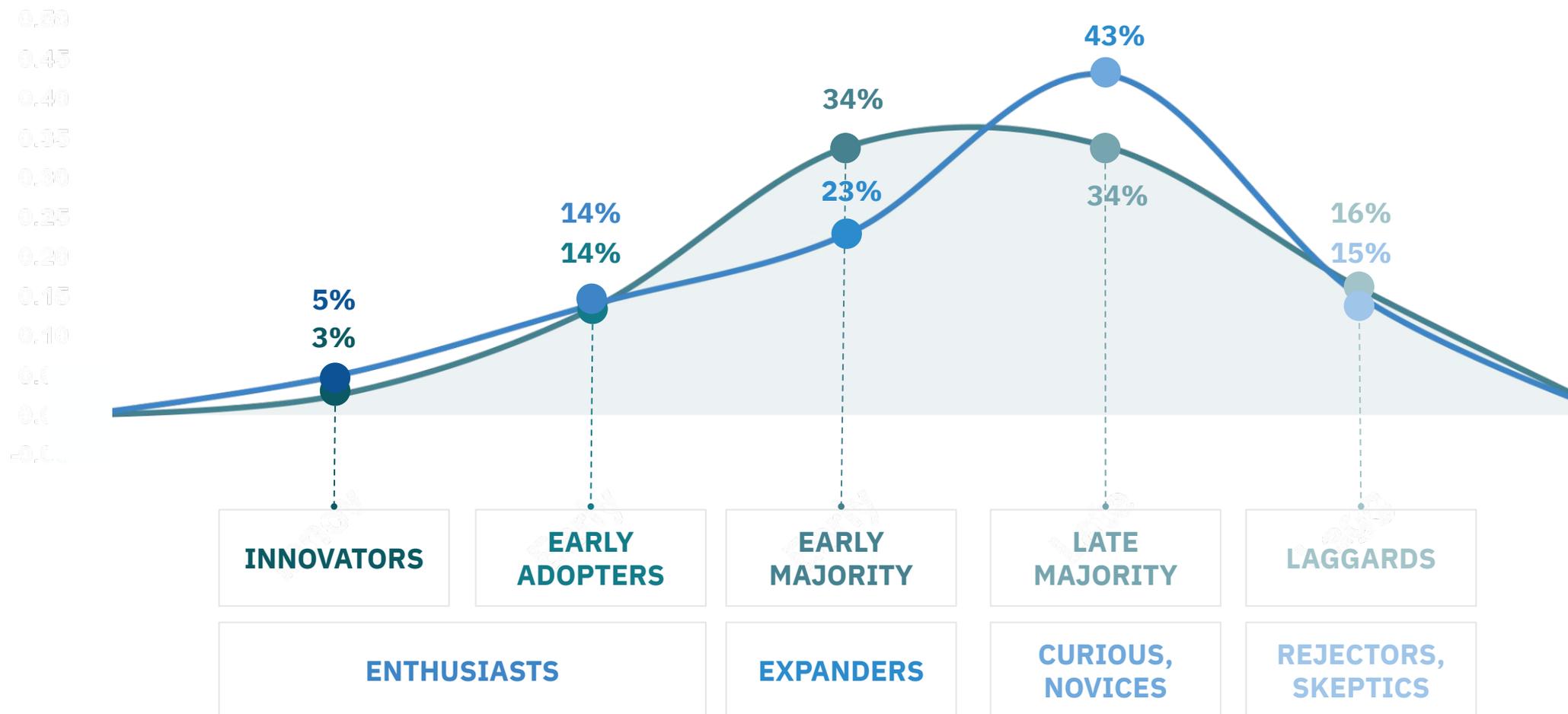


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Plant-based meat consumption drivers

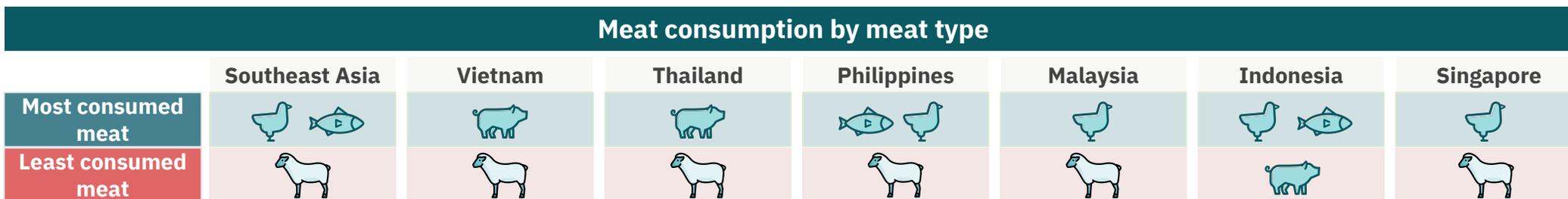
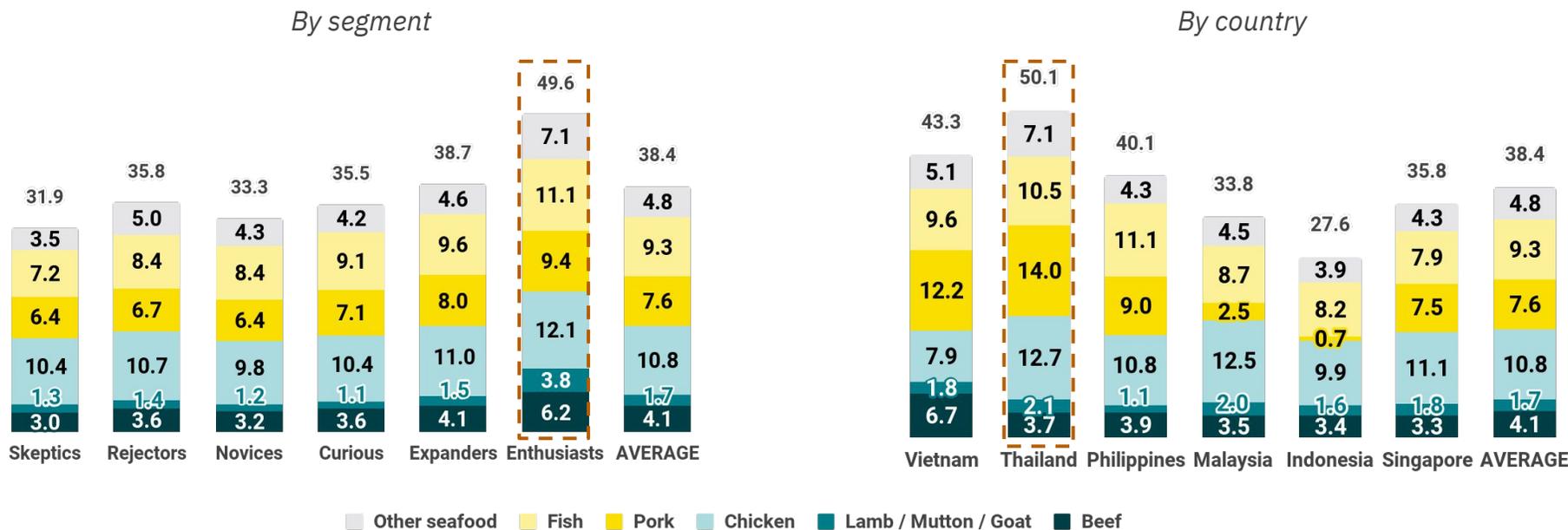
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Blended meat trial interest

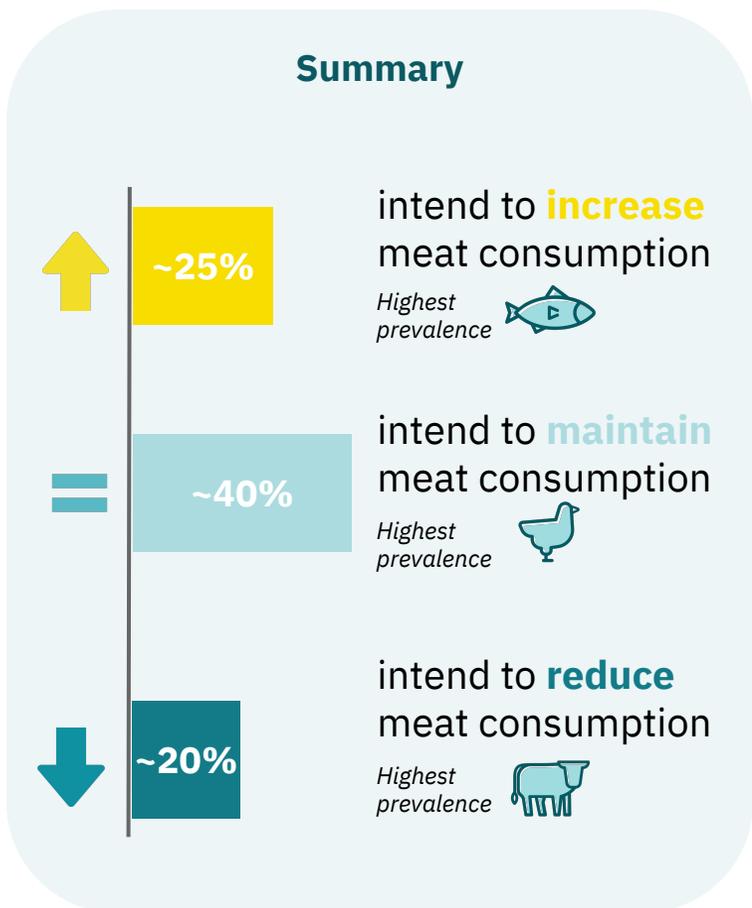
Those who consume plant-based meat the most often also eat conventional meat the most



Meat consumption frequency (n=5,971)

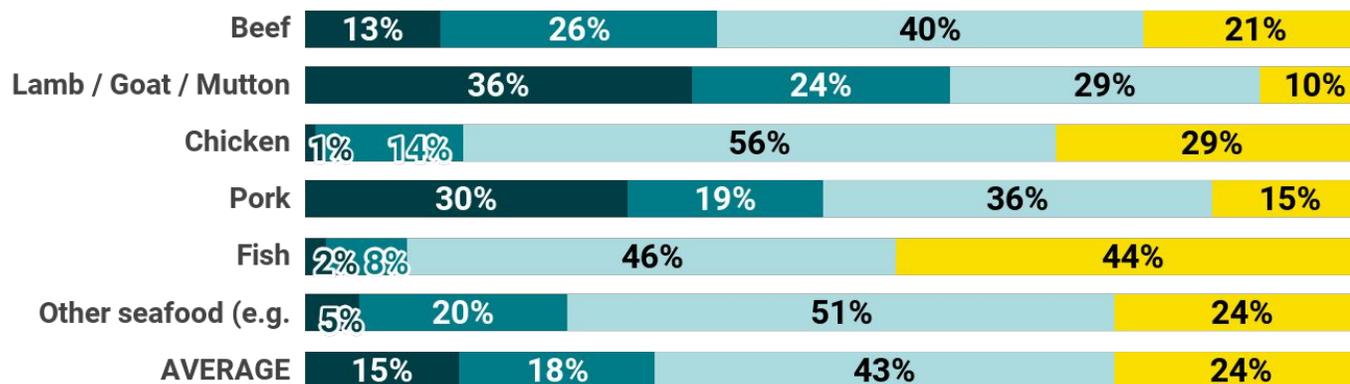


Only about a fifth intend to reduce conventional meat, while about a quarter want to increase it



Future meat consumption intentions (n=5,971)

Do you intend to eat more or less of this product in the upcoming year? (n=5,971)



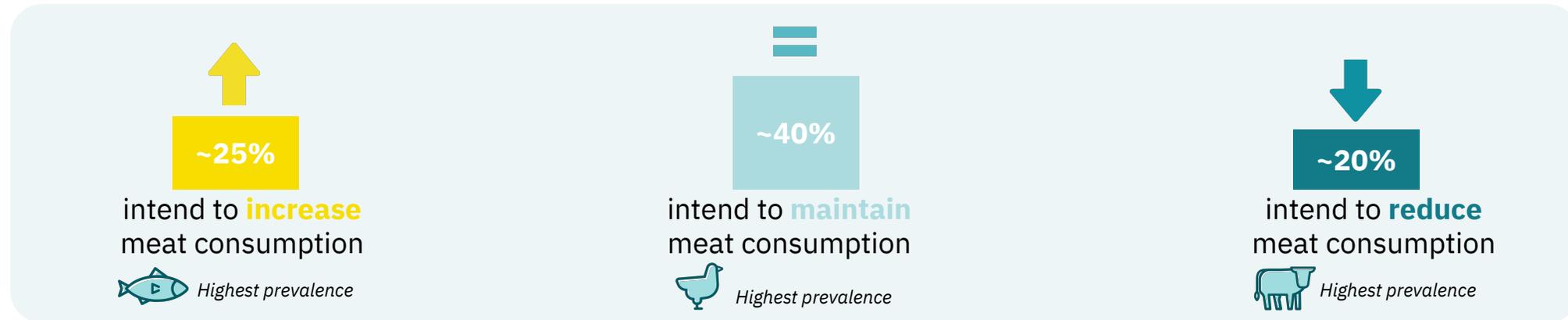
I never eat this
 Eat less
 Eat same
 Eat more



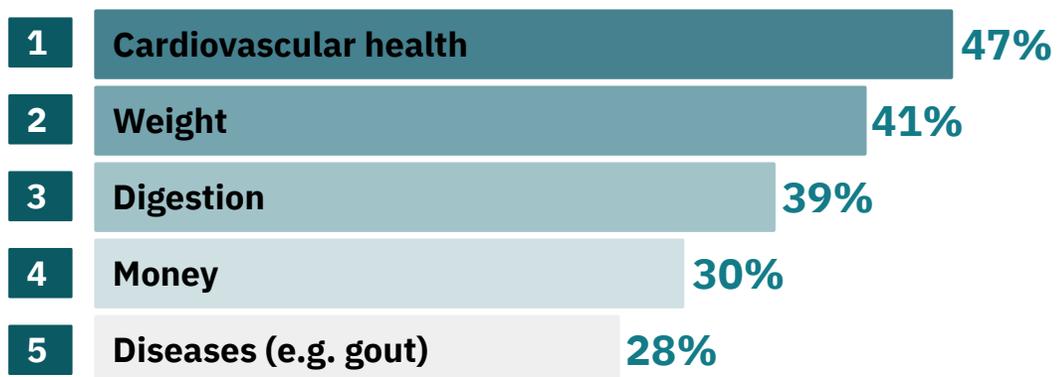
*Note: Multiple choice question, sample includes those reducing consumption of conventional meat



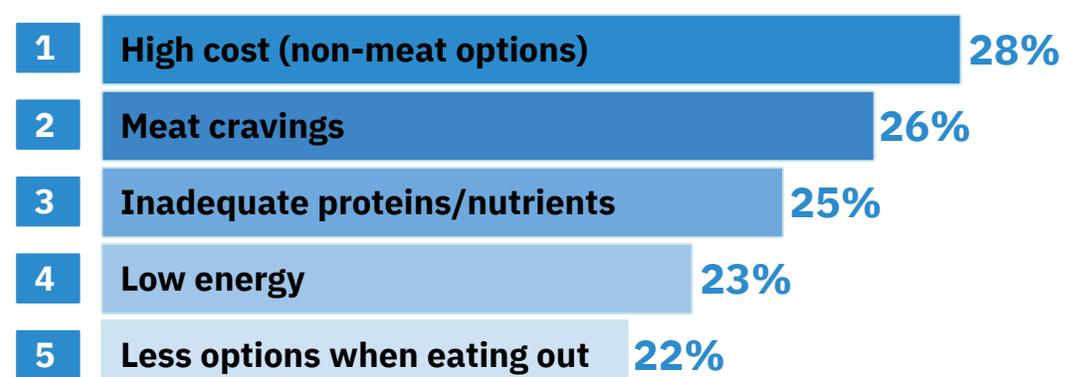
Only about a fifth of consumers intend to reduce conventional meat consumption, while about a quarter want to increase it



Top reasons for meat reduction (n=2,510)*



Top challenges in meat reduction (n=2,510)*



*Note: Multiple choice question, sample includes those reducing consumption of conventional meat

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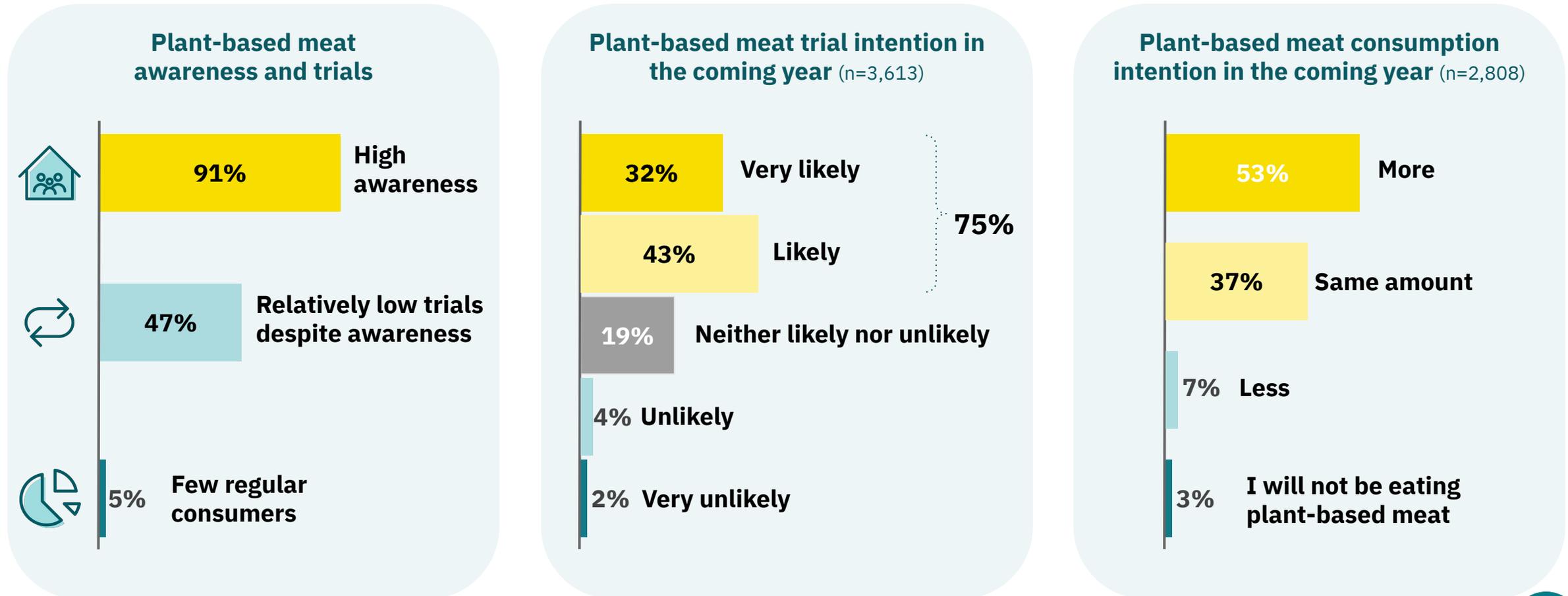
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Plant-based meat consumption drivers

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Blended meat trial interest

There is a sizeable untapped market, with most consumers aware of plant-based meat, but more than half never trying it



Most consumers associate plant-based meat more with positive attributes compared to negative ones

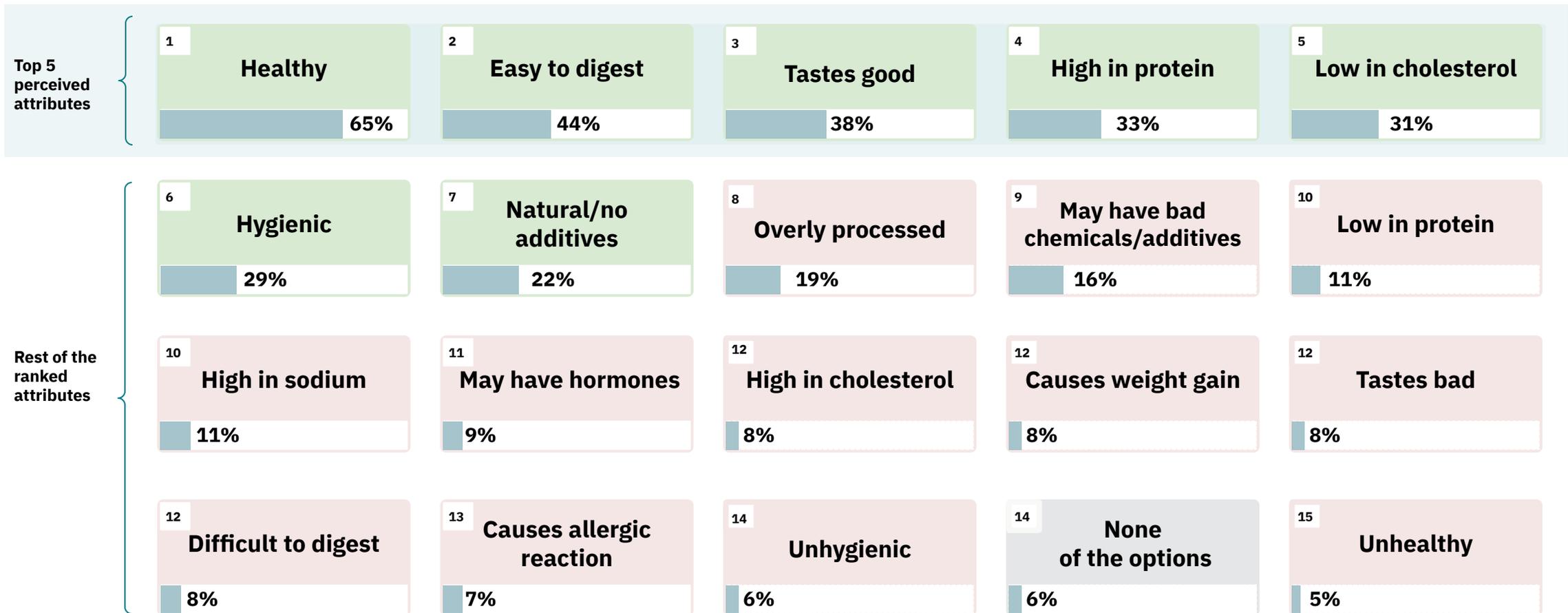
Top perceived attributes of plant-based meat by segments (n=5,971)

	Skeptics		Rejectors		Novices		Curious		Expanders		Enthusiasts	
1	Healthy	39%	Healthy	46%	Healthy	57%	Healthy	72%	Healthy	71%	Healthy	65%
2	Overly processed	26%	Overly processed	31%	Easy to digest	35%	Easy to digest	50%	Easy to digest	48%	Easy to digest	51%
3	May have bad chemicals/additives	25%	Easy to digest	27%	Tastes good	31%	Tastes good	41%	Tastes good	42%	Tastes good	46%
4	Easy to digest	21%	Tastes good	26%	High in protein	26%	High in protein	35%	High in protein	38%	High in protein	37%
5	None of the options	28%	May have bad chemicals/additives; High in protein	23%	Low in cholesterol	25%	Low in cholesterol	34%	Low in cholesterol	37%	Hygienic	33%

Top perceived attributes of plant-based meat by countries (n=5,971)

	Vietnam		Thailand		Philippines		Malaysia		Indonesia		Singapore	
1	Healthy	68%	Healthy	59%	Healthy	75%	Healthy	60%	Healthy	77%	Healthy	49%
2	Easy to digest	53%	Easy to digest	49%	Easy to digest	51%	Easy to digest	39%	Easy to digest	52%	Easy to digest; Tastes good	23%
3	Tastes good	40%	High in protein	36%	Tastes good	49%	Tastes good	36%	Tastes good	49%	Overly processed; High in protein	22%
4	Hygienic	34%	Hygienic	32%	Low in cholesterol	41%	High in protein	32%	High in protein	47%	Low in cholesterol	19%
5	High in protein	25%	Tastes good	30%	High in protein	37%	Low in cholesterol	31%	Low in cholesterol	38%		

Overall, 'healthy' is the top ranked perception for plant-based meat in the region



38 percent consider plant-based meat to taste good, and only 8 percent think otherwise

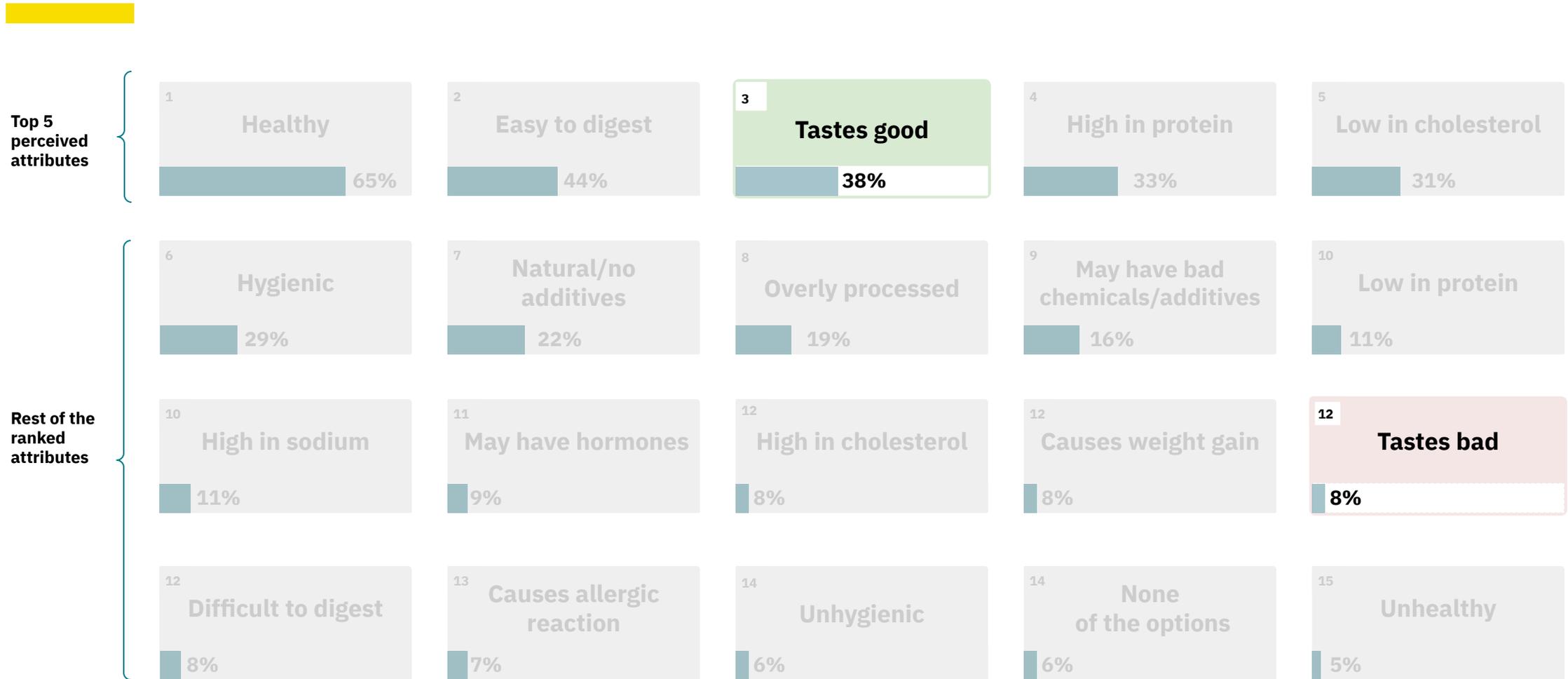


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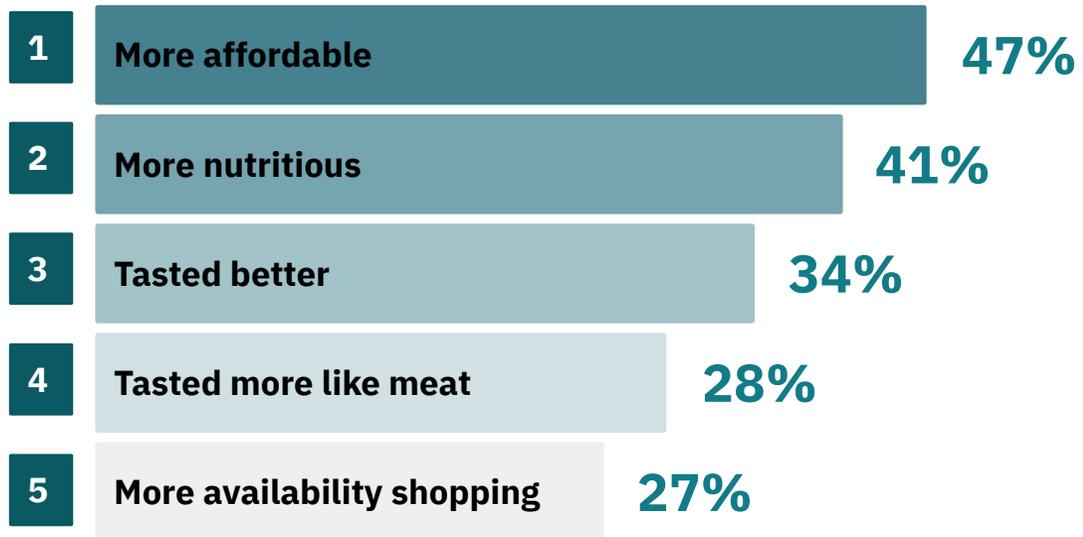
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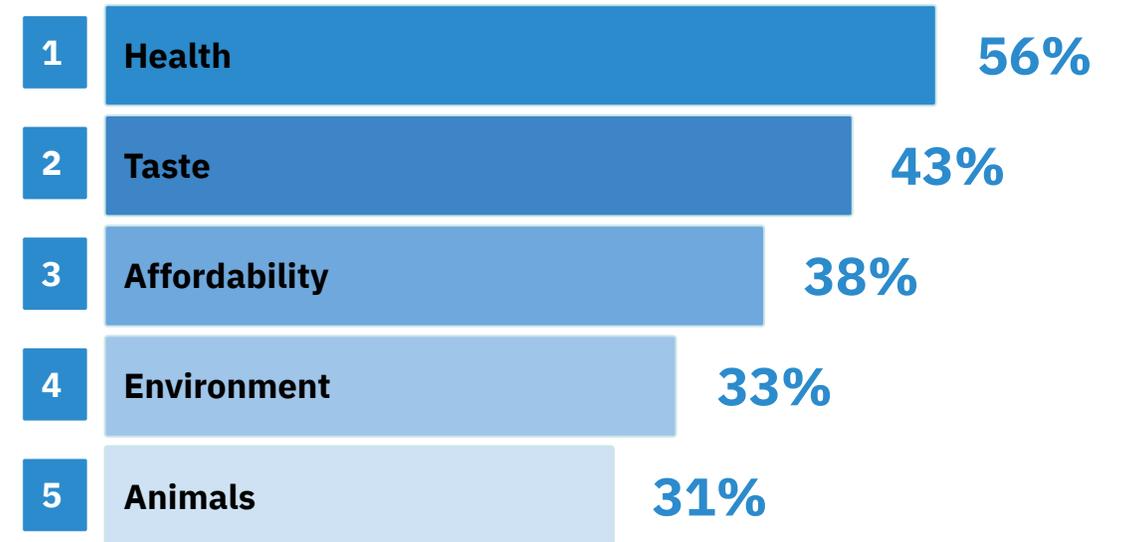
Blended meat trial interest

Affordability, health, and taste are the most important factors

Top factors to eat more plant-based meat (n=5,693)



Top factors to choose plant-based meat over meat (n=5,971)



Regular consumers seek more variety; ethical concerns are still important



Top factors to eat more plant-based meat by segments (n=5,693)

	Skeptics		Rejectors		Novices		Curious		Expanders		Enthusiasts	
1	Affordability	54%	Affordability; Better taste	39%	Affordability	45%	Affordability	52%	Affordability	43%	Affordability; Nutrition	39%
2	Nutrition	39%	Nutrition	35%	Nutrition	46%	Nutrition	44%	Nutrition	37%	Variety	31%
3	Better taste	40%	Meat-like taste	29%	Better taste	38%	Better taste	35%	Better taste	31%	Better taste	30%
4	Meat-like taste	30%	Less processed	26%	Meat-like taste	26%	Availability when shopping	32%	Meat-like taste	27%	Availability when shopping	28%
5	Variety	21%	Less additives	25%	Availability when shopping	22%	Meat-like taste	28%	Availability when shopping; Variety	26%	Meat-like taste	26%

Top factors to choose plant-based meat over meat by segments (n=5,693)

	Skeptics		Rejectors		Novices		Curious		Expanders		Enthusiasts	
1	Taste	47%	Health	36%	Health	55%	Health	60%	Health	62%	Health	56%
2	Affordability	45%	Environment	34%	Taste	47%	Taste; Affordability	50%	Animals	43%	Environment	43%
3	Health	42%	Animals	32%	Affordability	40%	Availability; Environment	31%	Environment	41%	Animals Taste	40%
4	Availability; Hygiene; Convenience	22%	Taste; Hygiene	25%	Hygiene	27%	Hygiene	26%	Taste	34%	Hygiene	36%
5			Affordability	24%	Availability; Environment	24%			Hygiene	31%	Convenience	27%

Note: Multiple choice question

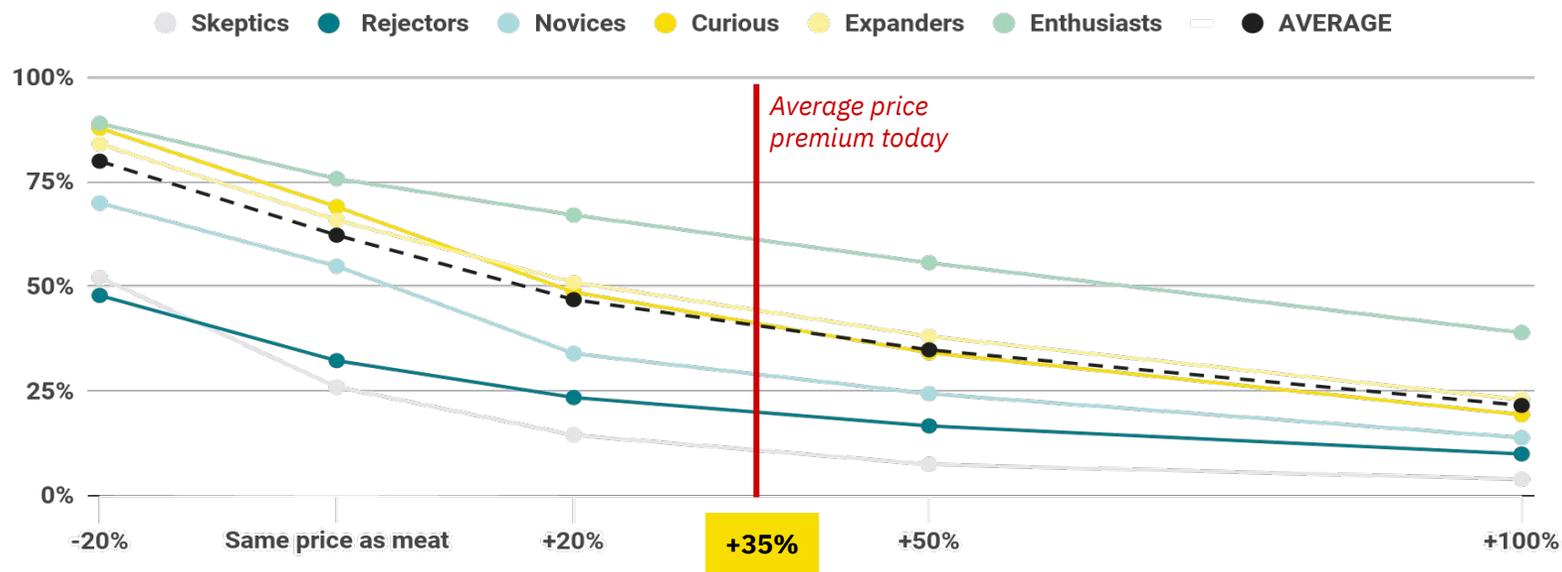


Affordability is critical to increase adoption in the region

Summary of consumers choosing to buy plant-based over conventional meat:



Percentage of consumers choosing plant-based meat over meat based on price (n=5,9731)



Regular consumers would increase from 5 to 63 percent if all current concerns are resolved

Consumption intention to choose plant-based meat if all concerns are resolved, by segments (n=5,971)

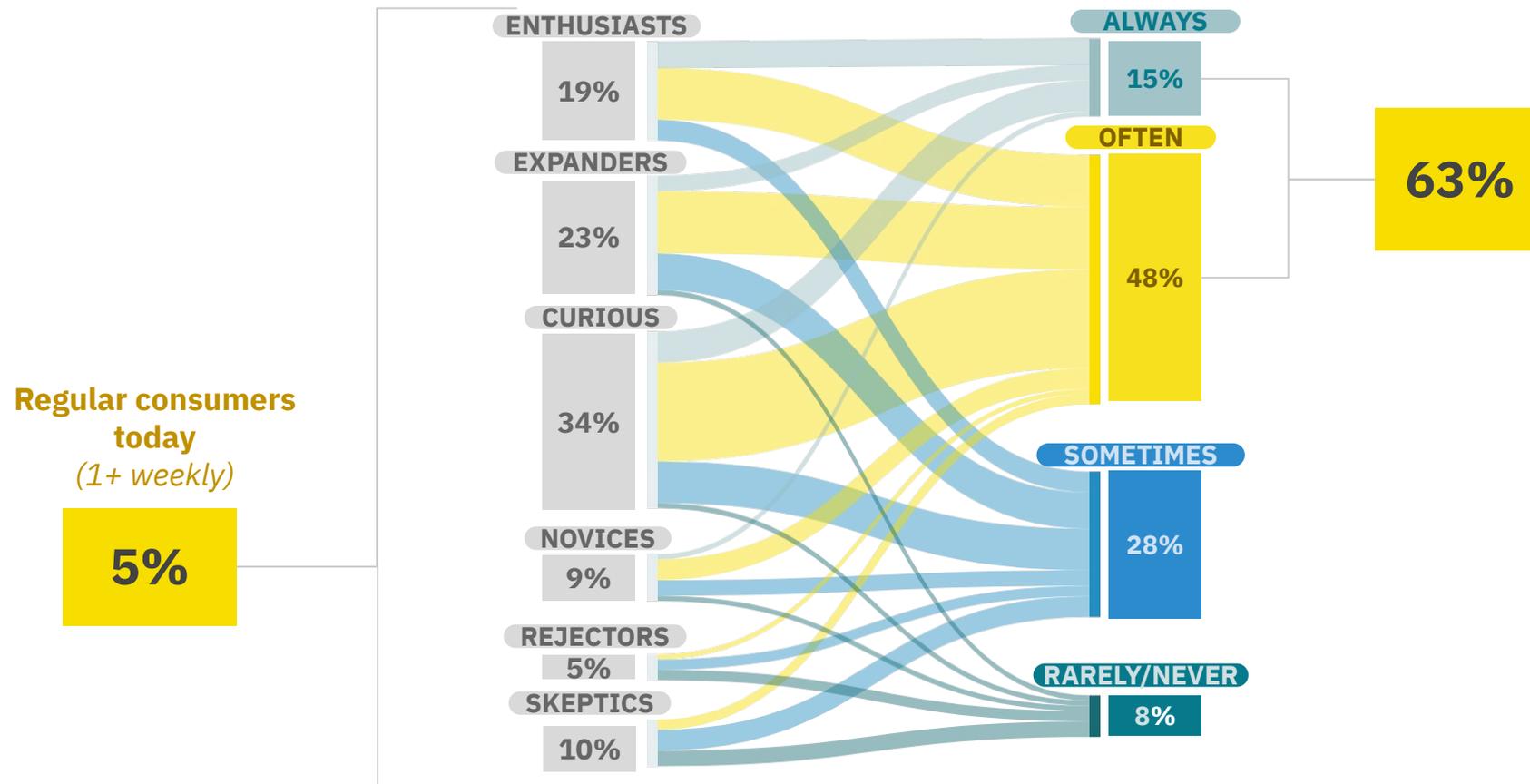


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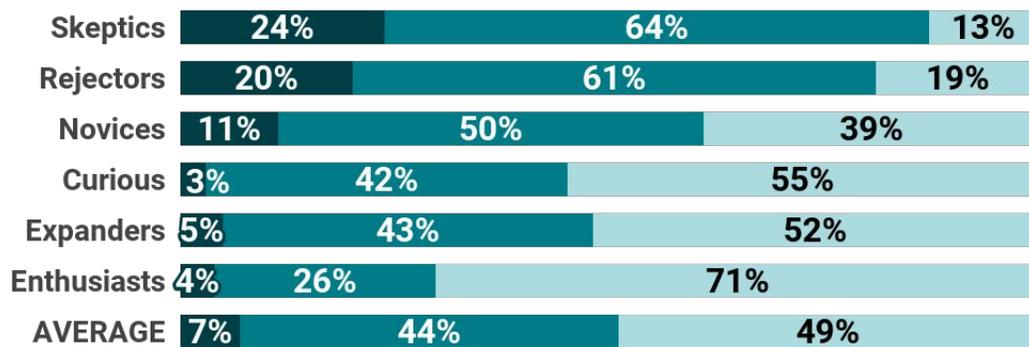
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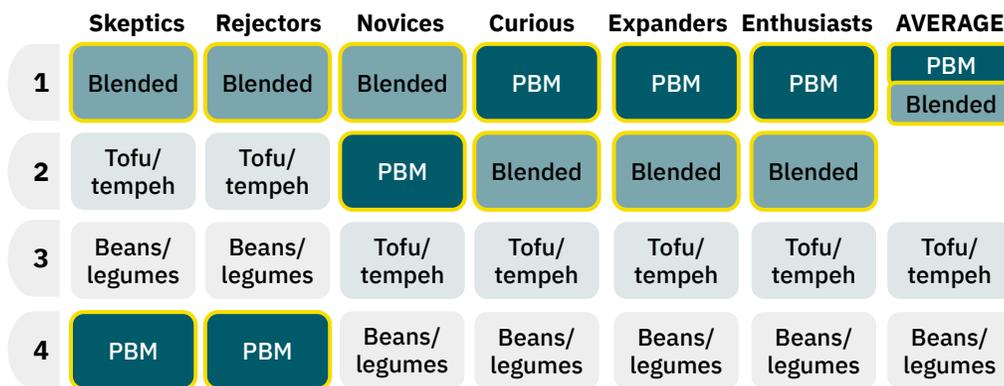
Blended meat* may be a parallel option to drive plant-based meat adoption

Interest in trying blended meat

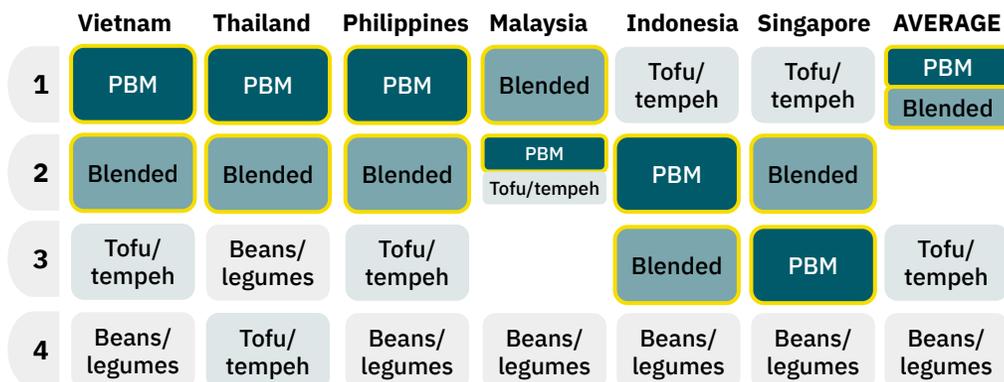
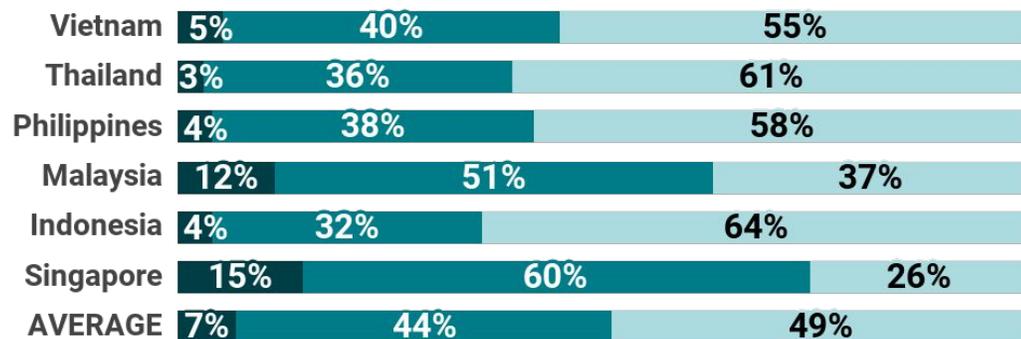
By segment
(n=5,971)



Preference ranking of four options containing plant protein



By country
(n=5,971)



■ Not interested ■ Slightly interested ■ Very interested

Note: *Blended meat was described to the respondents as products that mix plant-based meat into conventional meat



Recap: Key points

High awareness, low trials

Meat substitution framing may not appeal

Half of today's consumers are Millennials

Positive perceptions outrank negative ones

Affordability, health, taste, and variety are important

Price competitiveness is essential

Blended meat may be a parallel way to ease adoption



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