

NAVIGATING THE WORLD OF PLANT 2019 Global Topic Report – Detailed Outline

This comprehensive report from HealthFocus International takes a deeper look at the plant-based eating and drinking trend globally, regionally, and across 22 individual countries to help companies better understand shopper motivations and attitudes. This allows them to connect more powerfully with their targets and bring market solutions faster and more profitably.

MARKETS:

The following regions and countries are covered within the report:

- NORTH AMERICA: USA and Canada
- LATIN AMERICA: Brazil, Mexico, Colombia, and Argentina
- EUROPE: France, Germany, UK and Russia
- WEST ASIA: Saudi Arabia and Turkey
- SOUTH ASIA: India and Pakistan
- EAST ASIA PACIFIC: Australia, China, Indonesia, Japan, Philippines, S. Korea, Thailand, and Vietnam

TABLE OF CONTENTS:

- Introduction and Methodology
- Executive Overview & Summary Findings
- Plant-Based Market Overview
- Motivations for Choosing Plant
- Types of Diets
- Meatless Meals and Avoiding Animal Products
- Opportunity for Plant Protein
- Appendix – Individual Country Snapshots

TOPICS COVERED:

- **Plant-Based Market Overview**
 - How often are shoppers choosing plant-based foods/beverages? How does this vary by market and across demographic groups?

- Have plant-based foods/beverages become more important in their diet over the past year? Globally, how does this trend compare to other key dietary changes, like sugar reduction, natural, adding protein, eating clean, etc.?
 - Are shoppers willing to pay up to 10% more for foods or beverages that are plant-based? Globally, how does plant compare to other attributes shoppers are willing to pay a premium for, like no preservatives, free-from artificial ingredients, certified organic, premium ingredients, etc.?
 - How often do shoppers use plant-based meals? How often do they use plant-based beverages? Which markets and demo groups are the heaviest users?
- **Motivations for Choosing Plant**
 - What drives shoppers plant-based food/beverage choices (e.g., promotes long-term health, promotes daily health, helps prevent disease, eating clean, more energy, a taste preference, lifestyle preference, environmental/sustainability reasons, better treatment of animals)? How do core motivations differ by market and across demographic groups?
 - How do shoppers think plant-based foods/beverages compare to animal-based options (e.g., healthier overall, safer to eat, safer for the environment, fresher, more nutritious, better quality, better tasting)?
 - Desire for more fruits & vegetables: How many shoppers would like to get the daily fruits and vegetables they need in other foods and beverages? How often do they choose foods/beverages because they are made with fruits and/or vegetables?
- **Types of Diets**
 - How do shoppers describe their diet (e.g., I eat meat almost daily, my diet includes some meals without meat or fish but I'm not vegetarian or vegan, vegetarian (no meat or fish), vegan (no meat, fish, eggs or dairy), or other)?
 - How many shoppers self-identify as vegetarian or vegan vs. how many always/usually maintain these types of diets?
 - How often do shoppers use specific plant-based foods & beverages including:
 - Vegetarian foods
 - Soyfoods (e.g., tofu, tempeh, tofu hot dogs)
 - Soymilk & soy drinks
 - Almond milk
 - Coconut milk
- **Meatless Meals and Avoiding Animal Products**
 - How often are shoppers eating meatless meals? Have they increased their usage of meatless meals over the past two years?
 - How often do shoppers avoid red meat? How often do they avoid dairy products?
 - Over the past two years how many shoppers have decreased their use of red meat, seafood, chicken or other poultry, eggs or egg substitutes?

- Why are they limiting or avoiding meat consumption (e.g., general health, specific health reasons, to eat more vegetables and grains, environmental reasons, price, avoid harming animals, taste, etc.)?
 - Is the treatment of animals in the food supply source of concern for shoppers? Which shoppers are most focused on animal treatment?
- **Opportunity for Plant Protein**
 - How many shoppers are aware of plant protein?
 - How interested are shoppers in plant protein? Which markets and demo groups are most interested?
 - How many shoppers are willing to pay a premium for plant protein?
 - Which proteins are shoppers most interested in getting more of in their diet? How do plant-based proteins like nuts, beans, vegetable protein (e.g., peas), grains, soy and seeds (e.g., chia) compare to animal-based sources, like fish, milk, cheese, and insect protein? How do preferences vary by market?
 - What helps to determine a "good source" of protein? Is being from a plant-based source a key consideration?
 - Shoppers rated a variety of protein sources as good, neutral, or bad proteins – how do plant and animal based sources compare? Sources rated include: beans/legumes, cheese, chicken/poultry, eggs, hummus, lentils, milk, nuts/nut based spreads, pork/sausage, quinoa, red meat, seafood, soy, whey protein, and yogurt.
 - **Individual Country Snapshots**
 - Individual Country Snapshots for all 22 countries providing a quick overview of shopper attitudes & actions on the country level.