



# **A PLANT POWERED WORLD: *Exploring Plant-Based Eating Around the World***

## **2021 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:**

Detailed findings by region and individual detailed country snapshots covering:

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

### **TOPICS COVERED:**

- **Target Profiles**
  - This section looks at three core targets: Primarily Plant, Flexitarians and Meat-eaters to better understand their unique needs and help develop strategies for expanding the reach of plant-based products and animal alternatives. The groups are profiled globally and sized within each region and country.
- **Plant-Based Market Overview + Key Drivers**
  - Have plant-based foods/beverages become more important in their diet over the past year?
  - Interest in plant-based foods and beverages, and how interest varies by market and across demographic groups
  - How often are shoppers choosing plant-based foods/beverages?

- What is the brand influence of plant-based, and labeling importance across markets?
  - Are shoppers willing to pay up to 10% more for foods or beverages that are plant-based?
  - 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?
  - Desire for more fruits and 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?
- **Diet Types + The Declining Consumption of Animal Products**
    - How do shoppers describe their diet (e.g., I never use any animal-based products or ingredients; I do not use any meat or seafood, but I use dairy and/or eggs; I primarily avoid animal products, but I occasionally eat meat or fish)?
    - How many maintain vegan and vegetarian diets?
    - Have they increased their usage of meatless meals over the past two years? Have they decreased use of animal-based products?
    - How many avoid animal products and reduce meat consumption? How often do shoppers avoid red meat? How often do they avoid dairy products?
- **The Rise of Animal Alternatives**
    - Future possibilities in animal alternatives:
      - Which of the following alternatives to animal products are shoppers most interested in buying and/or using:
        - Non-dairy yogurt
        - Non-dairy cheese
        - Non-dairy milk
        - Non-dairy ice cream
        - Non-dairy butter
        - Egg free mayonnaise
        - Egg substitutes
        - Meat alternatives
    - What are the barriers to animal product alternatives?
    - Is the treatment of animals in the food supply a concern for shoppers? Which shoppers are most focused on animal treatment?
    - How often do shoppers use specific plant-based foods & beverages including:
      - Meat alternatives/substitutes other than soyfoods
      - Soyfoods (e.g., tofu, tempeh, tofu hot dogs)
      - Plant milks (e.g., almond milk, cashew milk, rice milk, coconut milk)

○ **Opportunities for Plant Protein**

- How interested are shoppers in plant protein? Which markets and demo groups are most interested? Are they increasing use of plant protein?
- How many shoppers are willing to pay a premium for plant protein?
- 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?