



# **THE PLANT PARADOX:**

## *Navigating the Complexities of Plant-based Perceptions around the World*

### **2022 Global Topic Report – Detailed Outline**

The “power of plant” is strong, and interest in plant-based food and beverage options continues to expand. However, consumers are becoming more discerning. Interest in plant-based products like meat alternatives and plant milks are being met with growing consumer concerns around exactly how healthy and sustainable these really are. We explore this evolving trend to determine what consumers are really looking for and how plant-based offerings can deliver.

This comprehensive report from HealthFocus International takes a deeper look at the plant-based eating and drinking trend globally, regionally, and across 23 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:**

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

#### **TOPICS COVERED:**

- **Target Profiles**
  - Exploring the different types of plant-based consumers to better understand unmet consumer needs and identify opportunities for future plant-based innovation. Groups are profiled globally and sized within each region and country. We will uncover:

- What their diet looks like
  - What are their primary motivations
  - How selective are they about plant-based sources?
  - What are their barriers around plant?
  - How interested are they in emerging protein solutions like lab-grown meat?
  - What do they look for on labels?
  - What drives them to pay more?
  - And much more!
- **Plant-Based Market Overview**
    - Have plant-based foods/beverages become more important in their diet over the past year?
    - How important is a “plant-based” claim on food labels?
    - Are shoppers willing to pay up to 10% more for foods or beverages that are plant-based?
    - How particular are consumers about the sources of plant-based ingredients they consume – or do they have no preference as long as it’s plant-based?
    - How do shoppers describe their diet?
      - 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 make an effort to reduce consumption of animal ingredients, but I occasionally eat meat or fish
      - I make an effort to eat both meat and plant in my diet
      - I eat meat regularly, and don’t restrict animal products
- **Key Drivers + Barriers to Plant-based Eating**
    - What do consumers associate with plant-based products?
      - Healthier
      - More nutritious
      - Fresher
      - More sustainable/environmentally friendly
      - Better tasting
      - More natural
      - Adds variety to my diet
      - More ethical (better treatment of animals)
    - What prevents consumers from using plant-based meals more often?
      - Taste and enjoyment
      - Cost
      - Availability or variety of products where I shop/eat
      - Convenience
      - Concerns about nutritional sufficiency
      - I don’t know how to cook plant-based meals
      - They are not always healthy
      - A balanced diet includes meat
      - I don’t like the ingredients/overly processed

- I don't feel satisfied/plant-based meals feel incomplete
- Everyone in my house has different meal preferences
- **The Rise of Animal Alternatives + Plant Protein**
  - How many avoid animal products and reduce meat consumption? How often do shoppers avoid red meat? How often do they avoid dairy products?
  - How important is an "animal-free" claim on food labels?
  - How often do shoppers use specific plant-based foods & beverages including:
    - Meat alternatives/substitutes
    - Plant milks (e.g., almond milk, cashew milk, rice milk, coconut milk)
  - 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?