Taking Plant-based Products Mainstream

Webinar: Asia Pacific

23 November 2020
Introduction

**PRESENTER**

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Looking at 2020 - what are we thinking about in Asia?

People are more concerned—not less—about addressing environmental challenges and are more committed to changing their own behavior.

- 94% COVID-19
- 91% climate change
- 90% air pollution
The Facts: Meat & Dairy

14.5% GHG emissions = meat and dairy (FAO)

1/3 world’s greenhouse gas emissions accounted for by food production

1/2 planet’s habitable surface used for food production

The Facts: Plant-based

10-50 x smaller

plant-based foods have lower carbon footprint than animal products

A global shift to “healthy” eating could offset around 4.5bn tonnes of CO₂ a year by 2050

Methodology

- Representative online samples of approximately 1,000 adults per country in each of 27 countries
- Samples representative of online population, weighted to reflect general population census data
- Online surveying in June 2020
- Where historical data are shown, questions were asked using an in-person and telephone methodology before 2019.
How people are personally affected

“Greatly” personally affected - Average of 27 Countries, 2020

40% The Economic Recession
31% Climate change/ global warming
49% Coronavirus/COVID-19 pandemic

T2. How much are you personally affected by each of the following problems?
Radar T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.

Majorities globally are very worried about COVID-19 and climate change.
Environmental Attitudes

Q11. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements.

<table>
<thead>
<tr>
<th>Statement</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am trying to improve my own health and well-being</td>
<td>84</td>
<td>80</td>
</tr>
<tr>
<td>I want to reduce the impact that I personally have on the environment and nature by a large amount</td>
<td>73</td>
<td>64</td>
</tr>
<tr>
<td>I am doing all I personally can to protect the environment</td>
<td>69</td>
<td>63</td>
</tr>
<tr>
<td>I feel guilty about my negative impact on the environment</td>
<td>53</td>
<td>43</td>
</tr>
</tbody>
</table>

“Strongly Agree” and “Somewhat Agree - Average of 24 Countries, * 2019–2020

81% in Asian countries are trying to improve their health and wellbeing

*Does not include Singapore, Thailand, and Vietnam as tracking data unavailable.

Q11. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements.
Opinions on Environment and Consumerism

“Strongly Agree” and “Somewhat Agree - Average of 24 Countries,* 2019–2020

- I believe we need to consume less to preserve the environment for future generations: 74% in 2020, 66% in 2019
- I am willing to pay more for products or brands that work to improve society and the environment: 57% in 2020, 50% in 2019
- In order to be happy, I need a lot of material possessions: 26% in 2020, 22% in 2019

Increasing year on year trend showing people are concerned about the environment and willing to pay more.

*Does not include Singapore, Thailand, and Vietnam as tracking data unavailable.

Q11. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements.
Lifestyle Changes
**Desire to make Lifestyle Changes**

**Desire to Change vs Changes Made to Lifestyle - Average of Asian Countries, 2020**

<table>
<thead>
<tr>
<th>Great desire to change lifestyle</th>
<th>Made major changes in past year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthy</td>
<td>Healthy</td>
</tr>
<tr>
<td>Environmentally friendly</td>
<td>Environmentally friendly</td>
</tr>
<tr>
<td>Helpful to others</td>
<td>Helpful to others</td>
</tr>
<tr>
<td>57</td>
<td>32</td>
</tr>
<tr>
<td>46</td>
<td>27</td>
</tr>
<tr>
<td>41</td>
<td>24</td>
</tr>
</tbody>
</table>

Q1. How much would you like to change your lifestyle to be more...? Q2. Have you made any changes to your lifestyle in the past year to be more...?
# Changing Consumption Behaviours

## Extremely and Very Interested - Average of 27 Countries, 2020

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Interest Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choosing products that last longer</td>
<td>77%</td>
</tr>
<tr>
<td>Choosing products with less packaging</td>
<td>63%</td>
</tr>
<tr>
<td>Buying from socially and environmentally responsible companies</td>
<td>62%</td>
</tr>
<tr>
<td>Avoiding disposable items</td>
<td>59%</td>
</tr>
<tr>
<td>Choosing products and services certified by a third party</td>
<td>59%</td>
</tr>
<tr>
<td>Choosing products made from recycled materials</td>
<td>58%</td>
</tr>
<tr>
<td>Buying food or household products</td>
<td>58%</td>
</tr>
<tr>
<td>Bring my own reusable containers to the store for</td>
<td>57%</td>
</tr>
<tr>
<td>Returning items to the store where I got them</td>
<td>53%</td>
</tr>
<tr>
<td>Buying fewer things in general</td>
<td>53%</td>
</tr>
<tr>
<td>Sharing products with others in my community</td>
<td>46%</td>
</tr>
<tr>
<td>Buying products second-hand/used</td>
<td>34%</td>
</tr>
<tr>
<td>Renting items such as furniture or clothing</td>
<td>20%</td>
</tr>
</tbody>
</table>

Q9. How interested are you in doing more of each of the following in the coming year?

62% want to buy from more socially and environmentally responsible companies.
### Changing Behaviours at Home

#### Extremely and Very Interested - Average of 27 Countries, 2020

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Interest Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saving energy in my household</td>
<td>80</td>
</tr>
<tr>
<td>Reducing food waste</td>
<td>78</td>
</tr>
<tr>
<td>Eating healthy and nutritious food</td>
<td>78</td>
</tr>
<tr>
<td>Preparing meals at home</td>
<td>77</td>
</tr>
<tr>
<td>Recycling materials</td>
<td>74</td>
</tr>
<tr>
<td>Saving water in my household</td>
<td>72</td>
</tr>
<tr>
<td>Eating locally grown foods</td>
<td>69</td>
</tr>
<tr>
<td>Repairing broken products</td>
<td>65</td>
</tr>
<tr>
<td>Reselling or donating products</td>
<td>63</td>
</tr>
<tr>
<td>Buying furniture that is easy to maintain and repair</td>
<td>60</td>
</tr>
<tr>
<td>Eating organic foods</td>
<td>60</td>
</tr>
<tr>
<td>Buying environmentally friendly furniture</td>
<td>57</td>
</tr>
<tr>
<td>Generating or buying renewable energy</td>
<td>57</td>
</tr>
</tbody>
</table>

78% want to eat more healthy and nutritious food.
Generational Differences

Q11. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements:

- **I am willing to pay more for products or brands that work to improve society and the environment.**
  - Gen Z: 63%
  - Millennials: 64%
  - Gen X: 55%
  - Baby Boomers+: 50%

- **In order to be happy, I need a lot of material possessions.**
  - Gen Z: 35%
  - Millennials: 33%
  - Gen X: 28%
  - Baby Boomers+: 17%

**Strongly Agree** and **Somewhat Agree**, - by Generation, 2020

63% Gen Z

64% Millennials

would pay more to improve society & environment
Questions and Answers....

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Sustainable Diets
**Influencing our diets**

Global Plant-Based Meat Market To Be Worth US$35 Billion By 2027 Due To Rising Health Concerns

- All milk alternatives are far better for the planet than dairy - 2018 *study* by researchers at the University of Oxford

- Mainstream brands and start-ups alike are introducing plant-based—and soon, cultured meat—alternatives, targeting not only vegetarians and vegans, but meat-eaters.

- Across Asia Pacific, the market for meat substitutes was $15.3 billion in 2019, up from $12.9 billion in 2015.

> **The alternative protein sector is the one that saw growth during the pandemic, both in China and the US,”**
> - Elaine Siu, Managing Director Good Food Institute Asia Pacific
Q12. Which of the following do you eat? Please select all that apply.

<table>
<thead>
<tr>
<th>Option</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eggs</td>
<td>91</td>
<td>9</td>
</tr>
<tr>
<td>Dairy</td>
<td>88</td>
<td>12</td>
</tr>
<tr>
<td>Poultry</td>
<td>84</td>
<td>16</td>
</tr>
<tr>
<td>Fish</td>
<td>83</td>
<td>17</td>
</tr>
<tr>
<td>Beef</td>
<td>73</td>
<td>27</td>
</tr>
<tr>
<td>Pork</td>
<td>66</td>
<td>34</td>
</tr>
<tr>
<td>Seafood</td>
<td>62</td>
<td>38</td>
</tr>
<tr>
<td>None of the above</td>
<td>1</td>
<td>99</td>
</tr>
</tbody>
</table>

- **91%** eat eggs (**88% in Asia**)
- **84% + 73%** eat poultry and beef (**78% + 64% in Asia**)
Preferences for Meat Alternatives

Q13. Assuming each tasted equally good, had equal nutritional value and cost the same, which one of the following do you prefer?

The majority of Asian countries show higher than average preference for meat-like alternatives.
Q13. Assuming each tasted equally good, had equal nutritional value and cost the same, which one of the following do you prefer?

Q14. What would be the most important reason, if any, for you to reduce the amount of meat you eat?
Desire for Environmentally Friendly Lifestyles

Q19. Over the past year, please indicate how often you have done or experienced each of the following.

- **47%** Sought out information related to environmentally friendly lifestyles
- **30%** Felt ashamed about living a lifestyle that is not environmentally friendly
- **40%** Have been encouraged to live an environmentally friendly lifestyle by family or friends
- **31%** Have been inspired by an online influencer or celebrity to live an environmentally friendly lifestyle
Questions and Answers....

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