

Taking Plant-based Products Mainstream

Webinar: Asia Pacific

23 November 2020

Introduction

PRESENTER



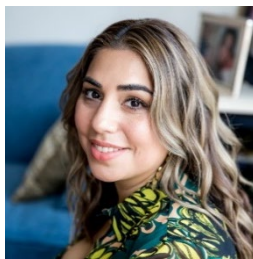
Wander Meijer
Director –
Asia Pacific
GlobeScan

MODERATOR



Victoria Gilbert
Assoc. Director –
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GlobeScan

SPEAKERS



Sonalie Figueiras
Founder and
Editor-in-Chief
Green Queen

green queen



David Yeung
Founder and CEO
Green Monday



Roberto Guidetti
CEO
Vitasoy
International



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**



GlobeScan Healthy and Sustainable Living Study 2020

Methodology



Participating countries in 2020

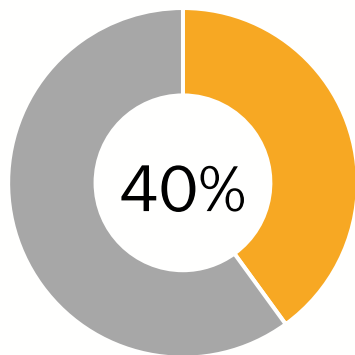
- Representative online samples of approximately 1,000 adults per country in each of 27 countries
- Samples representative of online population, weighted to reflect general population census data
- Online surveying in June 2020
- Where historical data are shown, questions were asked using an in-person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



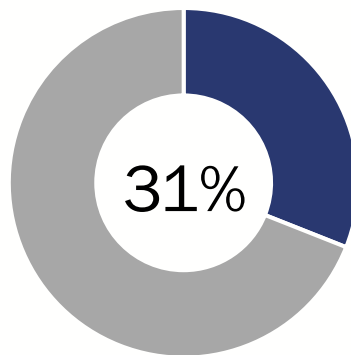
Context

How people are personally affected

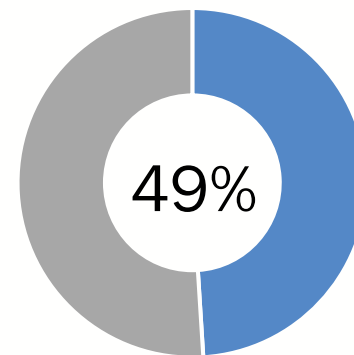
“Greatly” personally affected - Average of 27 Countries, 2020



The Economic
Recession



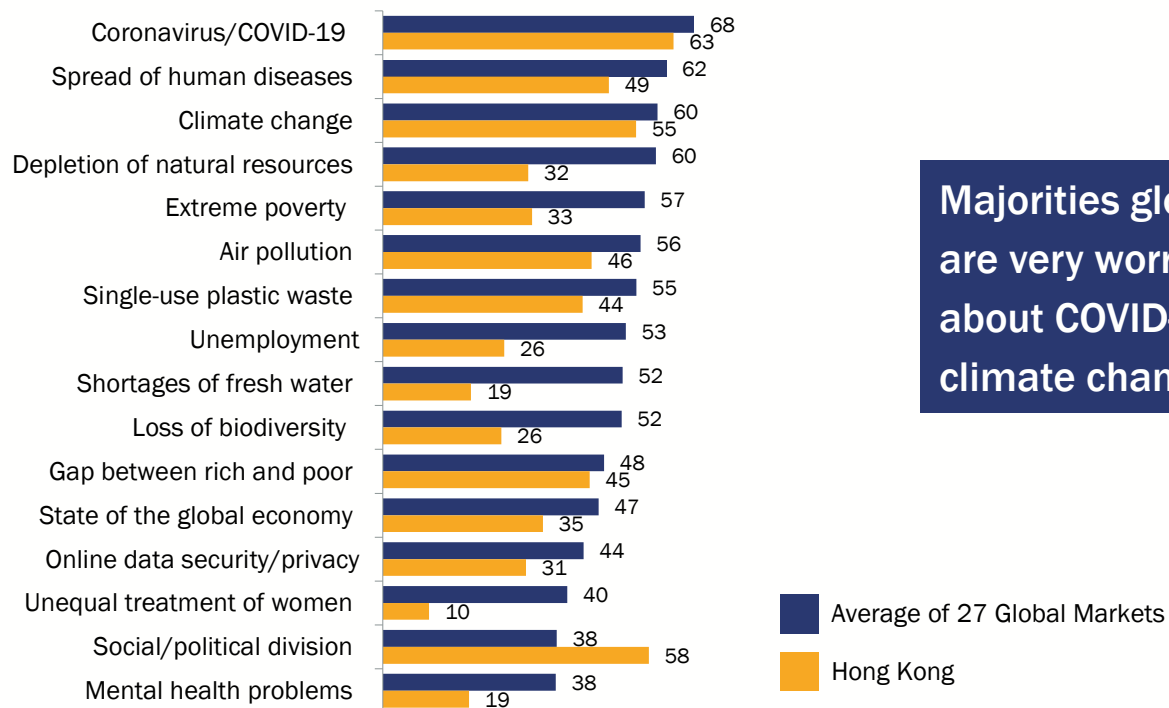
Climate change/
global warming



Coronavirus/COVID-19
pandemic

What are people concerned about?

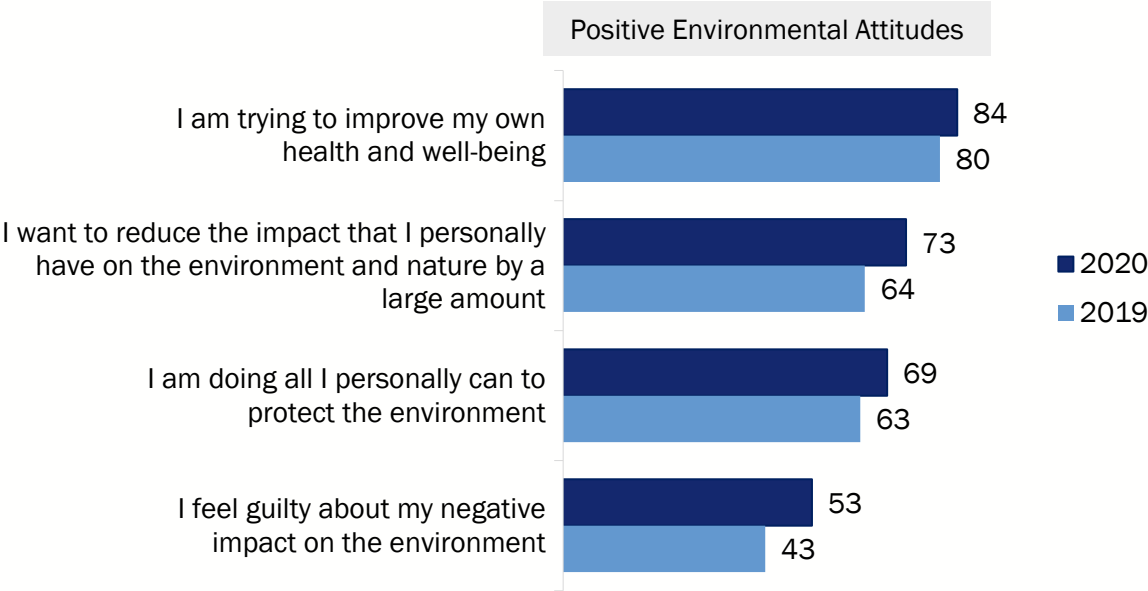
“Very Serious” Concern about Global Issues – Globally and Hong Kong



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

Environmental Attitudes

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



81%

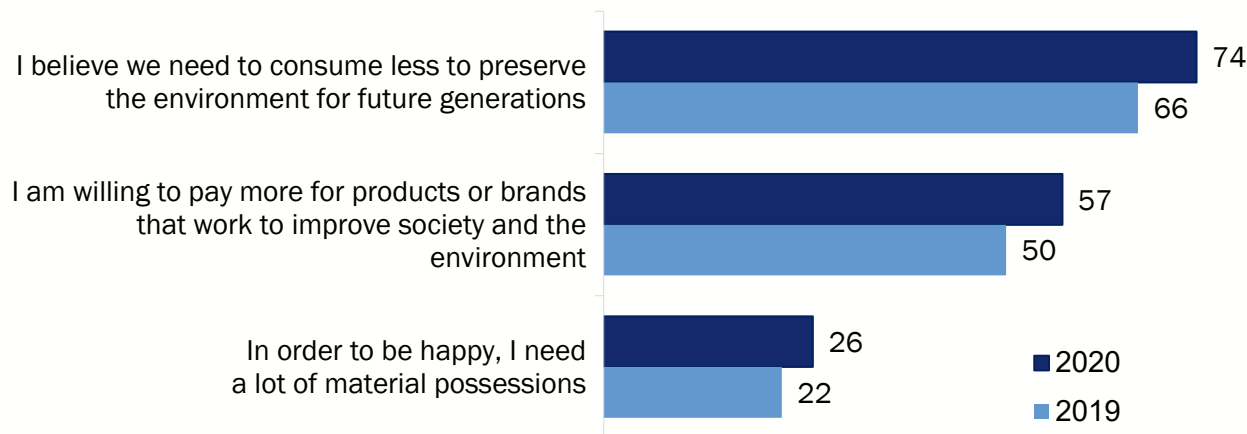
in Asian countries
are trying to
improve their health
and wellbeing

*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



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.

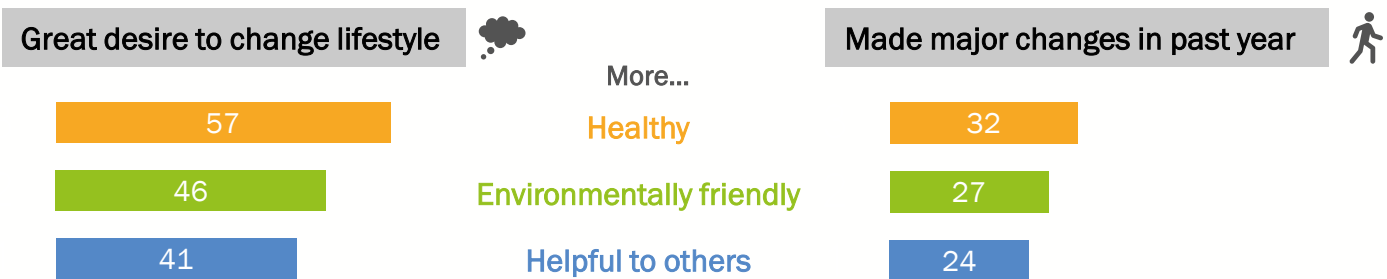
Q11. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements



Lifestyle Changes

Desire to make Lifestyle Changes

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



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

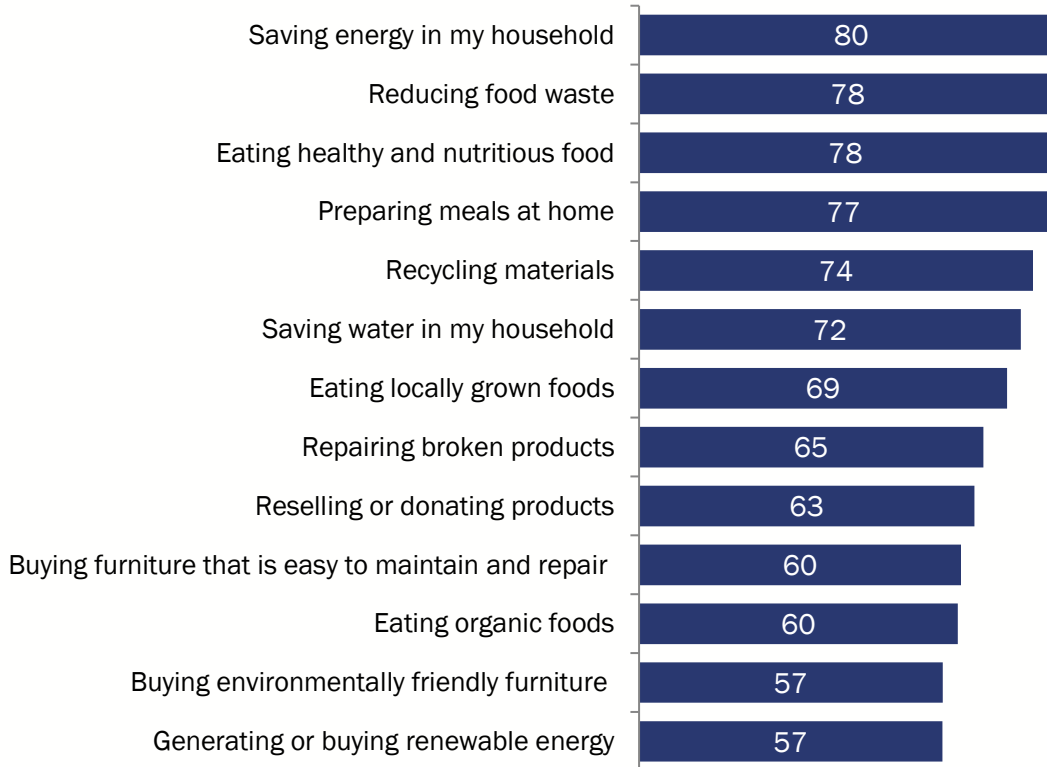


62%

want to buy from
more socially and
environmentally
responsible
companies

Changing Behaviours at Home

Extremely and Very Interested - Average of 27 Countries, 2020

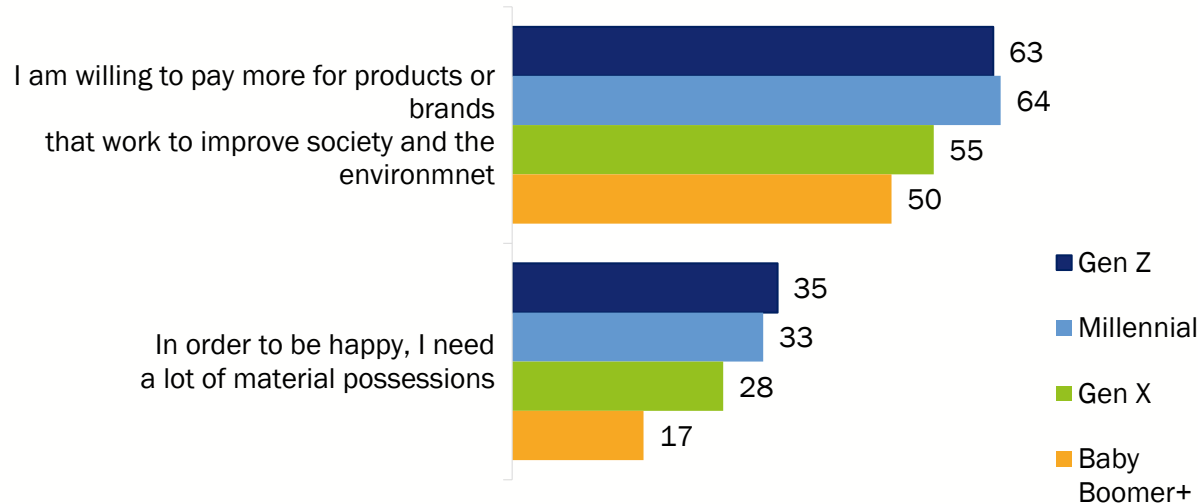


78%

want to eat more
healthy and
nutritious food

Generational Differences

Strongly Agree” and “Somewhat Agree,” - by Generation, 2020



63% Gen Z

64% millennials

would pay more to
improve society &
environment

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

Questions and Answers....

green queen



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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.

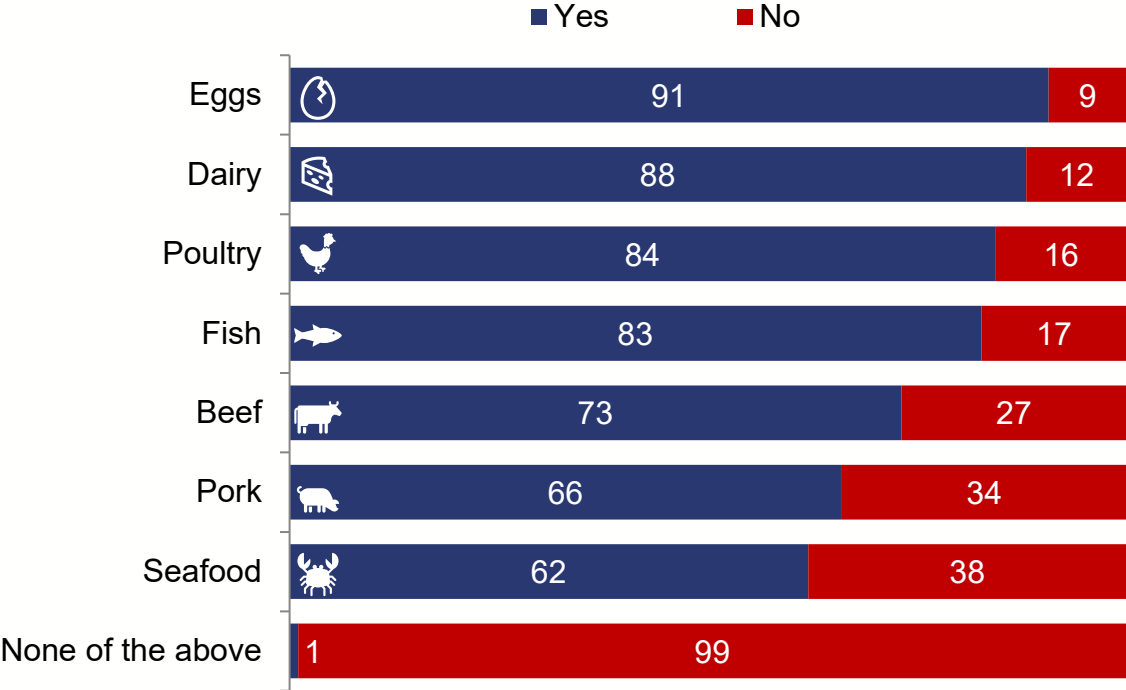
“

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



What are we eating?

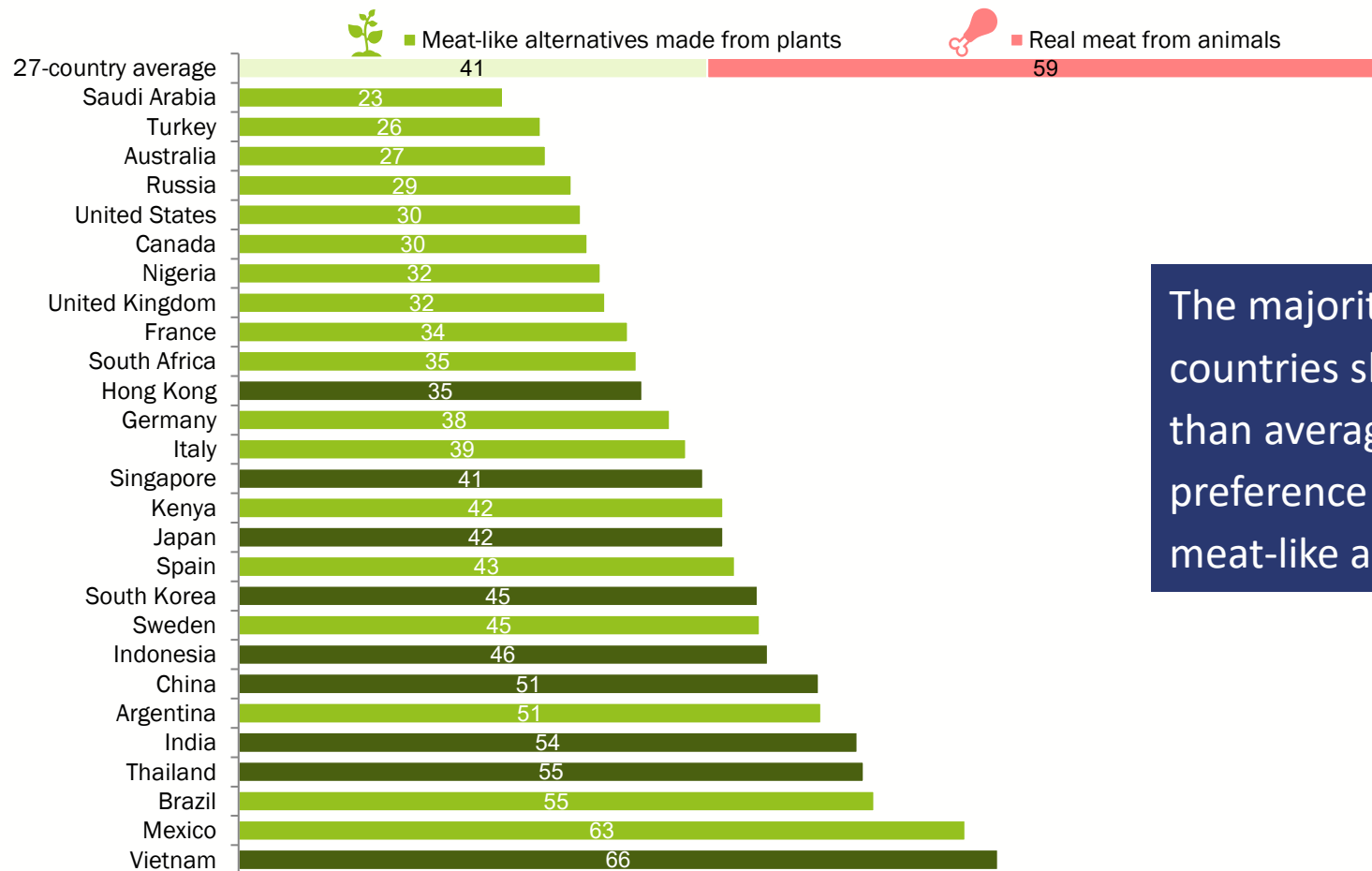
Yes” I Eat and “No” I Do Not Eat, Total Mentions - Average of 27 Countries, 2020



91%
eat eggs
(88% in Asia)

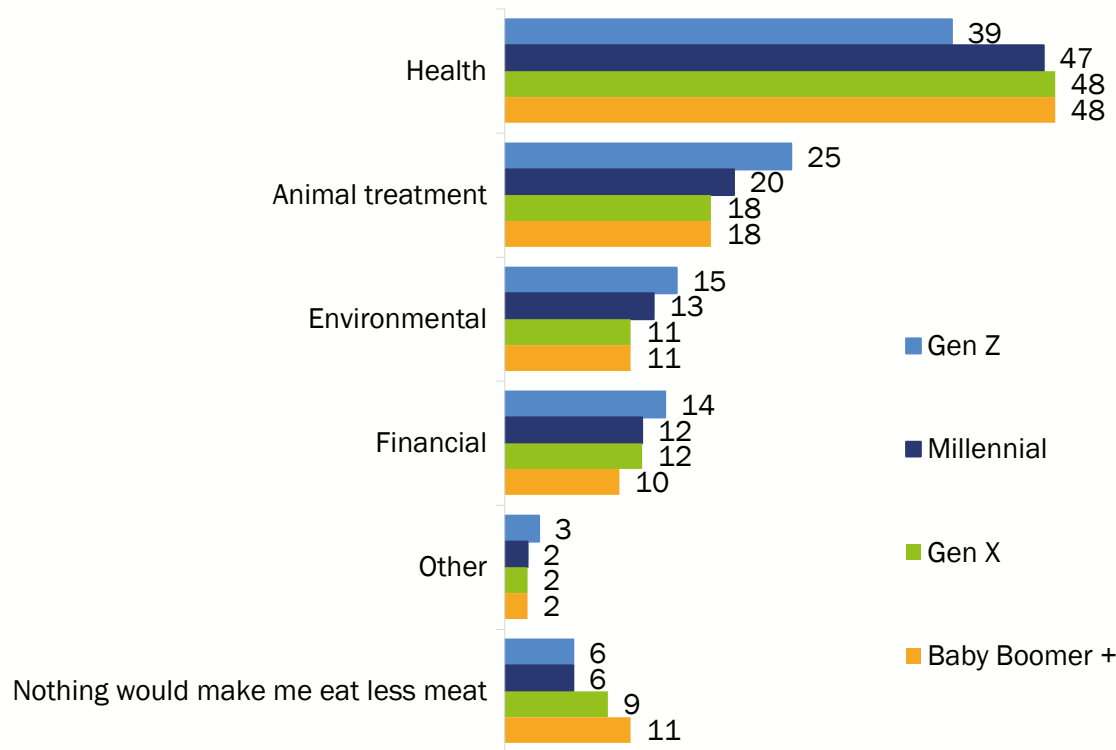
84% + 73%
eat poultry and beef
(78% + 64% in Asia)

Preferences for Meat Alternatives



The majority of Asian countries show higher than average preference for meat-like alternatives

Why eat less meat?



Most would eat less meat for **health** reasons

Gen Z more concerned about **animal welfare**

Desire for Environmentally Friendly Lifestyles



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

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THANK YOU!

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