# HUNGRY FOR PLANT-BASED: AUSTRALIAN CONSUMER INSIGHTS

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Commissioned by Food Frontier
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FOOD FRONTIER

life health foods

# HUNGRY FOR PLANT-BASED: AUSTRALIAN CONSUMER INSIGHTS

In a nation known the world over for its livestock production and meat-filled barbeques, millions of Australians are reducing their meat intake and interest in plant-based alternatives is gaining considerable momentum.

Drawing on nationally representative market research conducted by Colmar Brunton, this report serves to provide some key insights into Australian consumers' evolving relationship with meat. Whose choices are changing and why, and what's driving interest in plant-based meat alternatives?

Read on to discover what really matters to Australians when they head to the grocery store or sit down to a meal with friends and family.

## MILLIONS OF AUSTRALIANS ARE EATING LESS MEAT.

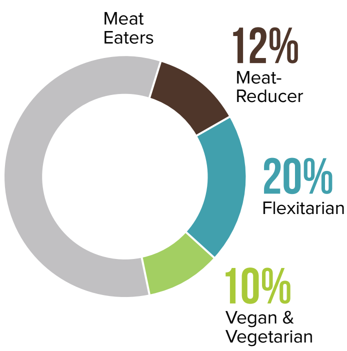

**1 IN 3**

AUSTRALIANS CONSCIOUSLY LIMITING THEIR MEAT CONSUMPTION.

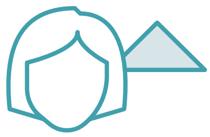
AN ADDITIONAL

**10%**

ARE ENTIRELY MEAT-FREE




IN THE LAST YEAR, INTEREST IN EATING LESS MEAT HAS GROWN:

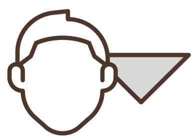


AUSTRALIANS DEFINED AS FLEXITARIANS HAS GROWN BY

**20%**

**20%**

OF MEAT EATERS HAVE REDUCED THEIR MEAT CONSUMPTION



# WHO IS LEADING THE WAY?

Baby-Boomers are leading the meat-reduction trend, whereas Vegetarians and Vegans are most likely to be Millennials.

Consistently all generations nominate health, the environment and animal welfare as the most important reasons to reduce meat consumption.

## WHERE YOU'RE MORE LIKELY TO FIND A...

| | |
|---|---|
| VEGAN | WA, SA, ACT, TAS |
| VEGETARIAN | VIC, SA |
| FLEXITARIAN | NSW |
| MEAT-REDUCER | QLD, SA, ACT, TAS |
| MEAT EATER | QLD, NT, TAS, REGIONAL AUS |

LEADING STATE/TERRITORY FOR EACH DIET TYPE

**43%** OF MEAT-REDUCERS ARE BABY-BOOMERS

**57%** OF VEGANS AND **61%** OF VEGETARIANS ARE MILLENNIALS

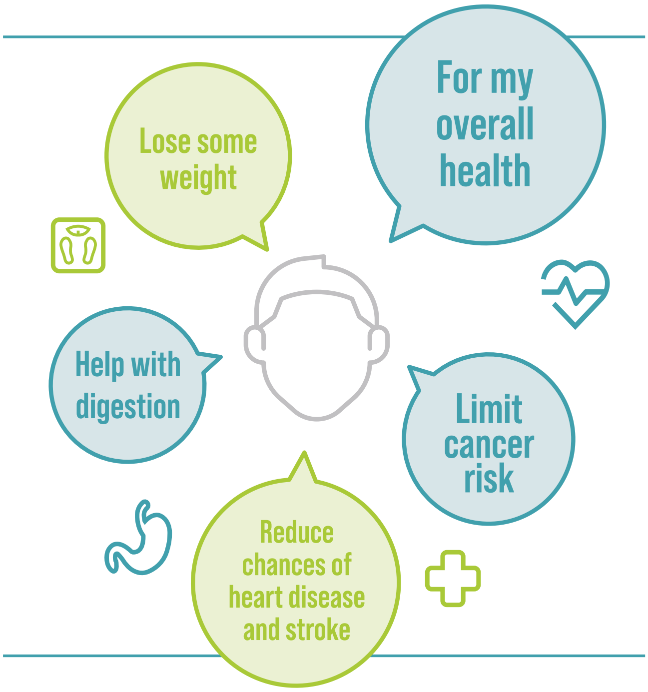
# #1 REASON AUSTRALIANS ARE EATING LESS MEAT? BETTER HEALTH.

Numerous well-publicised studies from health authorities including the World Health Organisation, EAT-Lancet Commission and others recommend eating less meat for better health and to combat chronic disease.

It appears Australians are getting the message.

## Health is the #1 reason Australians choose to eat less meat, closely followed by a four-way tie: the environment, animal welfare, cost and increasing variety of plant-based options available.

Meat eaters who aren't currently reducing their intake selected 'potential to reduce risk of illness' and 'improve overall health' as factors most likely to motivate them to eat less meat.




# IT'S NO SURPRISE: INTEREST IN PLANT-BASED MEAT ALTERNATIVES IS BOOMING.

As more Australians seek to reduce their meat consumption, many still want to enjoy the taste and convenience of their favourite meals. As a result, demand for meat alternatives in easy-to-prepare, familiar formats – from sausages to meatballs – is increasing rapidly.

## 6 in 10 Aussies have tried or are interested in trying the new generation of plant-based meat products.

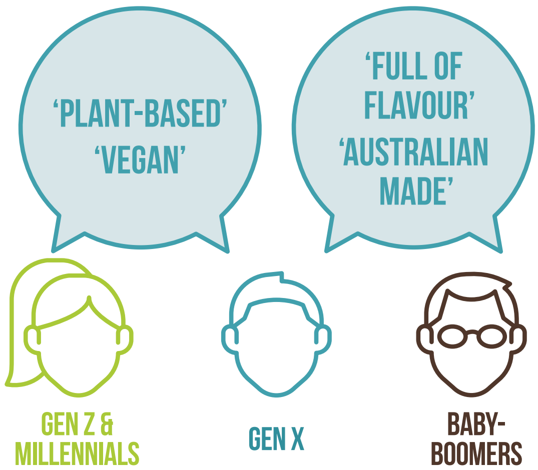
The rise in consumer interest in this category is driving greater availability and variety of plant-based meat alternatives, with more than 100 products now stocked on Australian grocery shelves.

These products vary from 'traditional' alternatives to 'new generation' products, the latter of which are designed to mimic meat at a sensory and functional level. However, consumers can still distinguish these new generation plant-based meats from their conventional meat counterparts when they are grocery shopping:

## 91% of Australians have never mistakenly purchased a plant-based product thinking it was its meat-based counterpart, or vice versa.

## And of the nine percent who have mistakenly purchased the wrong product, they were more likely to be a Vegetarian or Vegan.

### THERE ARE VARIOUS ON-PACK CLAIMS THAT MOTIVATE CONSUMERS TO PURCHASE A PLANT-BASED MEAT ALTERNATIVE:




'HIGH IN PROTEIN' IS A MOTIVATOR FOR ALL AGES.

# WHAT'S HOLDING MORE PEOPLE BACK FROM TRYING THESE PRODUCTS?

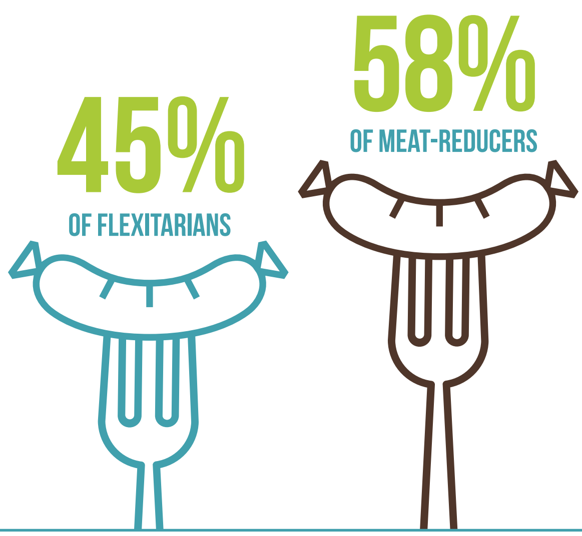
Despite the growing interest in plant-based meat alternatives, Australians have mixed perceptions of these products, with concerns surrounding nutrition, as well as price and taste.

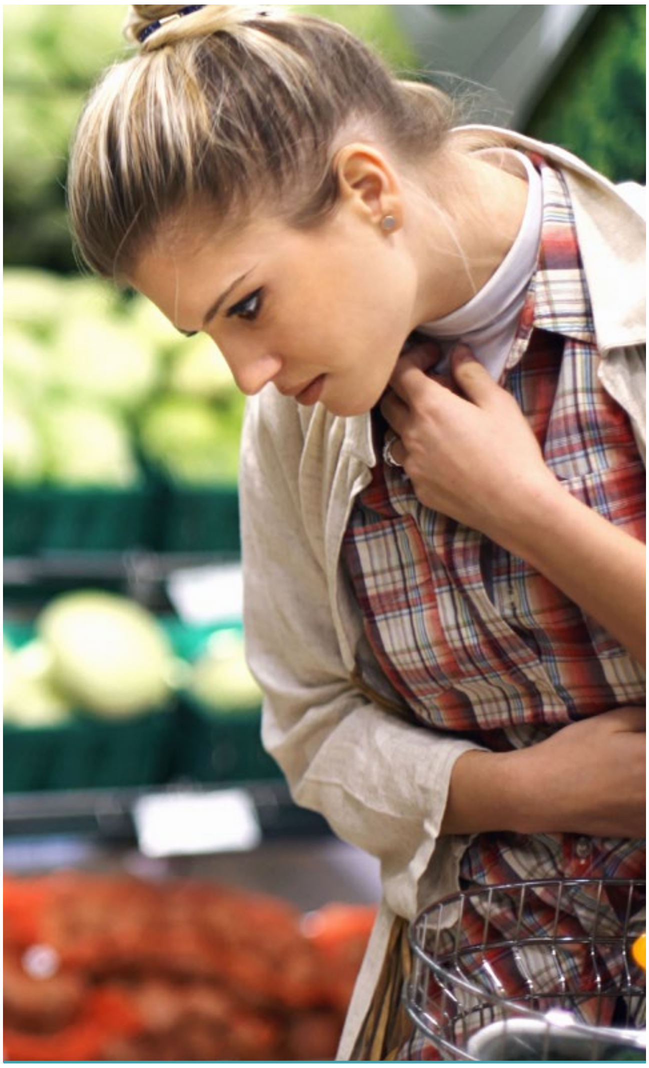
Considering many plant-based meat alternatives are nutritionally competitive with their conventional counterparts – such as containing greater protein, less saturated fat, no cholesterol and the added benefit of fibre – an opportunity exists for manufacturers to highlight these advantages in the marketing of their products.

For businesses creating plant-based meat alternatives, the research indicates a clear opportunity to better communicate nutritional benefits, innovate towards more accessible pricing and deliver better tasting products.


## NUTRITION
## PRICE
## TASTE

### AMONGST THOSE CONSCIOUSLY LIMITING THEIR MEAT CONSUMPTION, INFERIOR TASTE OF PLANT-BASED MEAT ALTERNATIVES IS A BARRIER FOR:



# WHAT'S NEXT FOR PLANT-BASED MEAT?

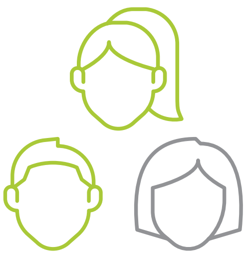
Australians are eating less meat, and in turn seeking out plant-based alternatives, as clearly demonstrated in this report. This points to meat alternatives as a growing food category that will bring economic benefit to Australia.

In fact, the country's plant-based meat sector is expected to grow from $150 million today to almost $3 billion in consumer expenditure by 2030, as modelled in Food Frontier's recently released 'Meat the Alternative' report.

This growth trajectory is evidenced by the fact two-in-three Australians have yet to try the new generation plant-based meat alternatives. Vast opportunities exist for Australia's meat alternative sector to reach millions more consumers both domestically and internationally.

**2 IN 3**

**AUSTRALIANS HAVE NOT TRIED NEW GENERATION PLANT-BASED MEAT**



And yet, as consumer perceptions around taste and health evolve, this research shows these factors remain barriers to be addressed. Plant-based meat alternatives provide Australians with new options in familiar formats, and additional nutritional benefits – like fibre and no cholesterol. Yet failure to clearly market these points means consumers still name nutrition as a top barrier.

Offering meat alternatives that meet the needs of a broad range of consumers will require investment, innovation and collaboration amongst retailers, chefs, food scientists, entrepreneurs and established food businesses alike. They are presented with a worthy challenge: to create foods that both excite consumers' taste buds and respond to their desire for options that are better for them, the planet and animals. The fact that more than ten million Australians are eating less meat and many have yet to try plant-based meat alternatives should be imperative enough.

## GUIDE TO KEY DIETARY TYPES IN THIS STUDY:

**Meat Eater:** Someone who is eating the same amount of meat, or more, in the last 12 months.

**Meat-Reducer:** Someone who is eating less meat in the last 12 months.

**Flexitarian:** Someone who is eating meat a maximum of four times a week; includes pescatarians.

**Vegetarian:** Someone who doesn't eat meat; some make exceptions for rare/special occasions.

**Vegan:** Someone who doesn't eat meat, eggs or dairy; some make exceptions for rare/special occasions.

## PLANT-BASED MEAT ALTERNATIVES TERMINOLOGY USED IN THIS STUDY:

**Traditional Plant-Based Meat** offers a plant-based alternative to meat but doesn't claim to taste, look and cook like meat. These products don't claim to offer a meat-like experience.

**New Generation Plant-Based Meat** products are designed to be very meat-like in their taste, appearance and cooking experience.

This highlights report features statistics from a study by leading market research agency Colmar Brunton on behalf of Food Frontier and Life Health Foods, August 2019.

**Food Frontier** is Australia and New Zealand's think tank and industry accelerator for plant-based meat alternatives and cultivated meat. Funded by philanthropy, Food Frontier is proudly independent.

**Life Health Foods** brings together some of Australia's most innovative plant-based food brands – Vegie Delights, Bean Supreme, Alternative Meat Co., Alternative Dairy Co. It sets out to enrich lives through innovative plant-based foods, made from ethically sourced ingredients.

For further enquiries on the data or to request supporting infographics, please contact info@foodfrontier.org.

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