



HUNGRY FOR PLANT-BASED: NEW ZEALAND CONSUMER INSIGHTS

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Commissioned by Food Frontier
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Research conducted by Colmar Brunton



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In a nation famous for its meat production and Sunday roasts, over a million New Zealanders 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 New Zealand 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 New Zealanders when they head to the grocery store or sit down to a meal with friends and family.

OVER 1.5 MILLION NEW ZEALANDERS ARE EATING LESS MEAT.

COMBINED, FLEXITARIANS AND MEAT-REDUCERS MAKE UP A THIRD OF THE NEW ZEALAND POPULATION:



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



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...

MEAT-REDUCER
NORTHLAND

VEGAN
AUCKLAND

MEAT-REDUCER
HAMILTON / WAIKATO REGION

VEGETARIAN
WELLINGTON REGION



44%
OF MEAT-REDUCERS
ARE BABY-BOOMERS



41%
OF VEGANS AND
42%
OF VEGETARIANS
ARE MILLENNIALS



#1 REASON NEW ZEALANDERS 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 New Zealanders are getting the message.

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

Meat eaters who aren't currently reducing their intake selected 'reduces my chance of getting cancer', 'reduces my chance of having a stroke' and 'improves my 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 New Zealanders 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.

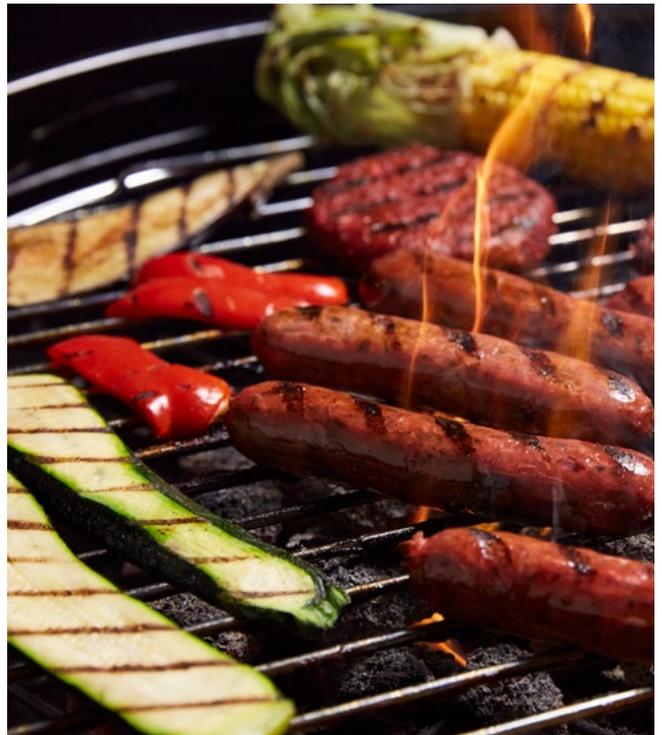
More than 6 in 10 Kiwis have tried or are interested in trying the new generation of plant-based meat products.

The rise in consumer interest is driving this category from niche to mainstream, with greater availability and variety of plant-based meat alternatives now on New Zealand grocery shelves.

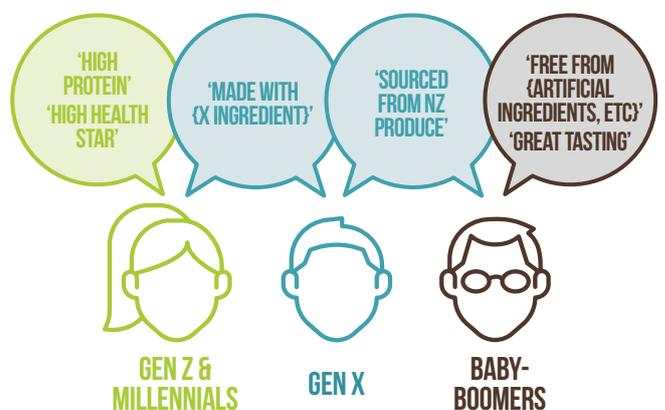
These products vary from 'traditional' alternatives to 'new generation' products, the latter of which are designed to mimic meat at a sensory and functional level. However, consumers can still distinguish these new generation plant-based meats from their conventional meat counterparts when they are grocery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

94% of New Zealanders have never mistakenly purchased a plant-based product thinking it was its meat-based counterpart, or vice versa.

And of the six 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:



'NEW ZEALAND MADE' 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, New Zealanders have mixed perceptions of these products, with concerns surrounding nutrition, as well as price and taste.

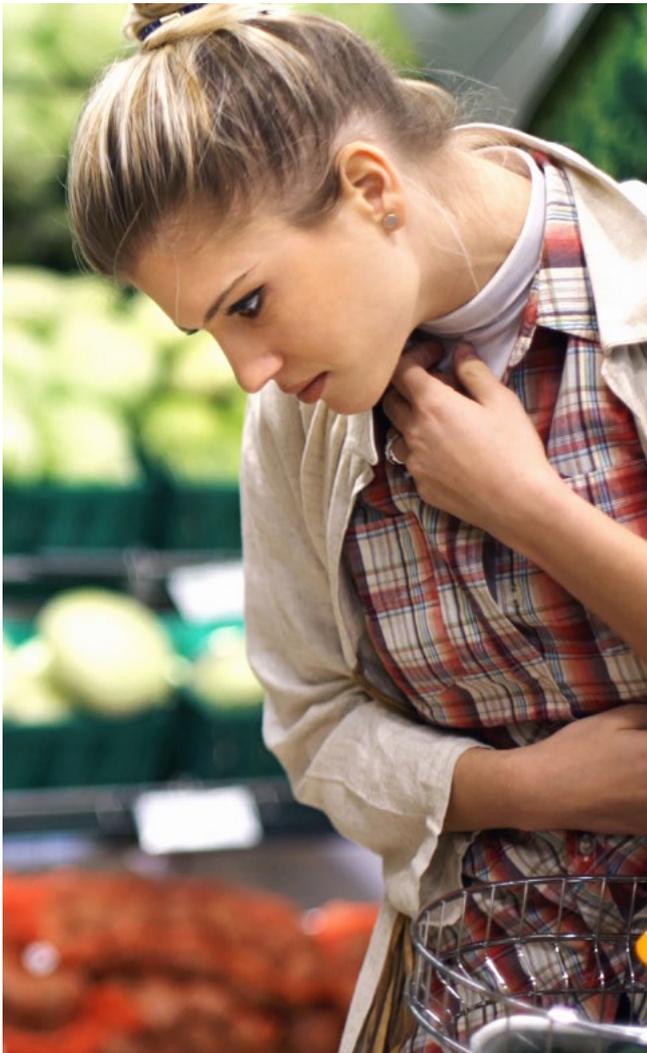
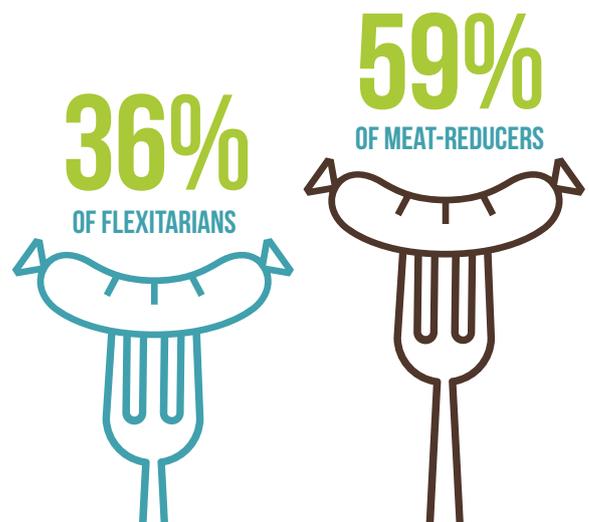
Considering many plant-based meat alternatives are nutritionally competitive with their conventional counterparts – such as containing greater protein, less saturated fat, no cholesterol and the added benefit of fibre – an opportunity exists for manufacturers to highlight these advantages in the marketing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

New Zealanders are eating less meat, and in turn seeking out plant-based alternatives, as demonstrated in this report. This points to meat alternatives as a growing food category that could bring an economic benefit to New Zealand.

This growth trajectory is evidenced by the fact only one-in-five New Zealanders have tried new generation plant-based meat alternatives. Vast opportunities exist for New Zealand's meat alternative sector to reach many more consumers both domestically and internationally.

HALF
OF MEAT-REDUCERS ARE
INTERESTED IN TRYING 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 New Zealanders 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 a third of Kiwis 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 New Zealand's most innovative plant-based food brands – Bean Supreme, Vegie Delights, Alternative Meat Co., Alternative Dairy Co. and Naked Cuisine. 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.