

PLANT-BASED DIETS – THAI CONSUMER – 2022

Driven by Gen Z, Thais have swayed towards omnivorous diets, creating new opportunities for plant-based food, meat and dairy alternatives and novel protein sources.



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This report looks at the following areas:

- COVID-19's impact on Thai consumption behaviour and how it drives plant-based diets
- Consumers' dietary preferences, and how they have changed between 2021 and 2022
- Plant-based protein sources of interest across age-gender groups and regions
- The success potential of plant-based alternatives across age-gender groups and regions
- Plant-based alternatives of interest across categories, by age-gender groups and regions (milk, yogurt, ice cream, meat, etc)
- A go-to-market strategy for driving the success of plant-based meat in the market
- Market opportunities for food and drink brands looking to innovate with plant-based foods



Driven by Gen Z, Thais have swayed towards omnivorous diets, creating new opportunities for plant-based food, meat and dairy alternatives and novel protein sources.

Overview

The majority of Thai consumers claim to follow an omnivorous diet (58%). Thais mostly consume meat as part of a balanced diet along with plant-based foods (eg omnivore and flexitarian diets), whereas consumers who follow a complete no-meat diet still make up a relatively small cohort (3% vegetarian and 1% vegan).

The COVID-19 pandemic has added emphasis to the importance of plant-based foods, as consumers focus more on healthy living. Mintel predicts that this trend will continue. As Thais age, they turn to plant-based foods to boost the amount of protein in their diets. Thai

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consumers are interested in a variety of plant protein sources, such as soy and algae, among others. Plant protein sources are well-positioned to deliver the functional and nutritional needs that Thais seek.

Moreover, brands have an opportunity to ride the plant-based trend by innovating with plant-based alternatives, with Millennials and Flexitarians being promising markets. Across all categories, the highest interest is in dairy alternatives (eg for milk, ice cream, yogurt) and meat alternatives.

Moving forward, plant-based product innovations with high nutritional value, and those that mimic the taste and texture of meat, will be crucial to meet the shift in dietary preferences among Thai consumers.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Key issues covered in this Report

Market context

- Overview
- Impact of COVID-19 on plant-based diets
- Thais are reducing their meat consumption to follow an omnivore diet
 - Graph 1: change in dietary preference between, 2021-22

What consumers want and why

- Bangkokians want: novel plant protein options
- Consumers want: plant-based dairy alternatives
 - Graph 2: type of plant-based alternatives of interest, 2022
- Older consumers want the experience, taste and texture of plant-based meat to be the same as the real thing

Opportunities

- Move beyond soy: explore less-familiar plant protein sources to meet the desire for novelty
- Dial up the range of plant-based milk alternatives and explore innovative plant protein blends to drive differentiation
- Drive palatability of plant-based meat by developing a realistic consumption experience

Competitive landscape

- Thailand's plant-based market space is witnessing increased competition

Mintel predicts

- The outlook for plant-based diets in Thailand
- The marketing mix – the four Ps

KEY TRENDS

- What you need to know

Consumers' growing desire to lead healthier lifestyles

- Plant-based foods boom in the pursuit of healthy living
- Consumer demand for wholesome nutrition raises interest in plant protein sources
- The food safety of meat becomes a concern, while appreciation for 'clean and natural' grows

More voices are being raised on the subject of animal welfare

- Powerful global vegan campaigns illustrate animal-cruelty and urge consumers to follow plant-based diets
- Growing sentiments for animal welfare among Thai consumers
- Campaigns are empowering consumers to save animals, calling them 'heroes of the world' for purchasing plant-based food items

Multinational players see a future in plant-based alternatives

- More plant-based alternatives are becoming available globally
 - Graph 3: annual share of launches in the plant-based spoonable yogurt (dairy alternatives), meat substitute, plant-based ice cream & frozen yogurt (dairy alternatives) and plant-based drink (dairy alternatives) sub-categories, 2017 -22
- Thailand's meat market giants are developing a plant-based product line

Science and technology enable elevated sensations for plant-based alternatives

- Food-tech companies adopt new technology to advance the taste and looks of plant-based alternatives
- Patents issued for methods that replicate the structural features of real meat
- Global food and drink brands are communicating the 'realness' of meat alternatives

CONSUMER INSIGHTS

- What you need to know

Thai consumers' dietary preferences

- Thais seek a balance of meat and plant-based foods in their diets
 - Graph 4: dietary preference, 2022
- Shift from carnivores to omnivores: Thais are reducing their meat consumption
 - Graph 5: change in dietary preference, 2021-22
- Gen Z adopt omnivorous lifestyles as they cut down on meat consumption
 - Graph 6: change in percentage of carnivore consumers between 2021-2022, by age group, 2022
 - Graph 7: change in percentage of omnivore consumers between 2021-2022, by age group, 2022
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 - Graph 8: agreement with the statement 'plant-based foods are good options to lose weight', by dietary preferences, 2022
- Concerns regarding animal welfare will drive vegetarianism and veganism
 - Graph 9: agreement with the statement "I have set a goal to switch from eating animal-based meat to a full plant-based diet in the future", 2022
- Thais turn to plant-based foods to fulfill their nutritional protein requirements as they age
 - Graph 10: select behavior 'I choose plant-based food to boost the amount of protein in my diet (eg tofu)', by age group, 2022

Plant-based protein sources of interest

- Bangkokians seek novelty and variety in the source of protein
- Educate older Thais on the functional health benefits of plant-based protein
 - Graph 11: agreement with the statement 'Little is known about the health benefits of plant-based proteins', by age group, 2022
- While soy dominates plant protein launches, opportunity exists for lesser-used sources such as algae, oats and pea protein
 - Graph 12: interest in incorporating plant-based protein sources into daily diet, 2022
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 - Graph 13: interest in incorporating soy protein as part of the daily diet, by age group, 2022
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 - Graph 15: interest in incorporating select plant-based protein sources into daily diets, by financial situation, 2022

Plant-based food and drink alternatives and their potential in the Thai market

- Bangkokians are more likely to consume plant-based alternatives
 - Graph 16: plan to consume more plant-based food and drink alternatives in the next six months, by region, 2022
- Place plant-based alternatives visibly next to their meat counterparts on retail shelves
 - Graph 17: agree to being 'more likely to purchase plant-based food and drink alternatives when they are sold next to the products they're meant to replicate', total vs consumers who plan to consume more plant-based food and drink alternatives in the next six months, 2022
- Foodservice can be a route to discovery and trial for plant-based food alternatives
 - Graph 18: agreement that 'restaurants are a good place to start trying food with plant-based alternatives', by consumers who plan to consume more plant-based food and drink alternatives in the next six months vs those who do not, 2022
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 - Graph 19: interest in trying types of plant-based food and drink alternatives, 2022
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 - Graph 20: interest in types of plant-based food and drink alternatives, by generation, 2022
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- Position plant-based milk as a workout drink to drive consumption among Bangkokians
 - Graph 22: interest in trying plant-based milk, by region, 2022
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 - Graph 23: interest in trying plant-based milk, by generation, 2022
- Older consumers are the key target market for plant-based meat
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- Drive the affordability of plant-based milk and meat alternatives to expand consumer base
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Plant-based meat: a go-to-market strategy

- Enter the snacking market with plant-based meat to trigger consumption among older consumers
 - Graph 27: interest in trying plant-based meat as a snack food (eg plant-based nuggets), by age group, 2022
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 - Graph 28: agreement that 'plant-based meat doesn't taste as good as real meat', by age group, 2021
- Innovative formats of plant-based meat benefit the Bangkok market
- Opportunity for urban fast-food chains to offer plant-based meat menu options
 - Graph 29: agreement that 'fast food restaurants (eg McDonalds) should offer plant-based meat options', by area, 2022

MARKET APPLICATIONS

- Opportunities: key areas of focus

Plant-based protein: exemplify its multiple benefits and explore novel plant protein sources

- Promote the functional health benefits of plant-based protein
- Dial up protein cues on the front of pack; call out the quantity of plant protein to attract consumer attention
- Innovations are meeting consumer interest in soy, but opportunity exists to move beyond
 - Graph 30: share of plant-based food and drink launches, by top 10 plant protein ingredients, 2019-22
- Explore unfamiliar plant protein sources to meet the desire for novelty
- Inspiration for the use of single-cell microalgae protein
- Less commonly promoted protein sources

Dial up the range of plant-based alternatives across categories

- Brands are losing focus of plant-based milk innovations
- Entice consumers with novel flavours of plant-based dairy products
- Blend a range of plant proteins for optimal taste and nutrition in plant-based milk
- The scarcity of plant-based ice cream and yogurt is an opportunity for brands to meet market interests
 - Graph 31: average share of plant-based dairy alternative launches in the last three years, by sub-category, 2019-22
- Innovative plant-based ice cream and yogurt launches
- Growing range of plant-based meat alternatives meets market interests
 - Graph 32: annual share of meat substitute launches, 2019-22
- Inspiration for innovating with different types of meat substitutes to meet the interests of flexitarians
- Move beyond chicken and pork: innovate with plant-based eggs and develop a breakfast positioning
- Dial up high/added protein claims in meat substitutes

- Graph 33: share of launches in meat substitutes annually, by high/added protein claim, 2019-22

- Reassure consumers that plant-based meat is not inferior to original meat in terms of nutritional value

Next for plant-based alternatives: building its palatability

- Plant-based meat with bones and everything: mimic taste and texture in the most realistic way possible
- Dial up the 'juiciness' of plant-based meat products
- Develop the functionality of plant-based milk for use in occasions such as coffee and tea

Provide a range of food formats using plant-based meat

- Offer innovative, bite-size, snackable plant-based meat options
- Launches of ready meals with plant-based meat are rising to meet market demands
 - Graph 34: share of launches in the prepared meals and meal kits sub-categories, by plant-based claim, 2019-22
- Inspiration for innovating ready meals with plant-based meat

APPENDIX

- Consumer research methodology

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