

PROCESSED MEAT – THAI CONSUMER – 2022

Motivate consumption with a better-for-you proposition, premiumise with clean labels, engage through flavours and drive relevance with new daypart positioning.



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Processed Meat - Thai Consumer - 2022

This report looks at the following areas:

- Consumption of different processed meat formats
- Consumer segments of processed meat
- Important factors of consideration when choosing processed meat products
- Behaviour towards choice and consumption of processed meat
- Attitudes towards processed meat
- Interest in processed meat innovations



Motivate consumption with a better-for-you proposition, premiumise with clean labels, engage through flavours and drive relevance with new daypart positioning.

Overview

Thais consume a wide range of processed meat formats. Frozen and chilled processed meat are consumed the most, while consumption of shelf-stable processed meat lags behind.

This report looks at the processed meat category from the lens of three consumer segments: Sceptics (who consume 1-3 types of processed meat), Explorers (who consume 4-7 types) and Enthusiasts (who consume 8+ types). This report discusses how to encourage consumption among Sceptics, and how to keep Enthusiasts engaged with the category and enhance value for them.

Brands have the opportunity to build the health value proposition of processed meat through the use of nutritional, functional, clean label and minus claims.

To keep consumers engaged and to meet the rise in adventurous consumers, brands can explore novel flavour groups of processed meat. Lastly, new consumption occasions through

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the day can unlock opportunities for processed meat and drive daily relevance among consumers.

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Report Content

EXECUTIVE SUMMARY

- Mintel's perspective

Key issues covered in this Report

- Overview
- Rising demand for nutritious food and drinks are shaping consumers' expectations of processed meat
- Introducing the three types of processed meat consumers
- Motivate consumption with better-for-you offerings
- Drive premiumisation with clean labels and transparent sourcing information
- Enhance excitement by dialing up flavoured innovations
 - Graph 1: interest in trying processed meat products that feature foreign cuisine flavours, by consumer segments, 2022
- Position for different daypart occasions: enter the snack and breakfast foods market
- The outlook for the processed meat category in Thailand
- Quick download resources

KEY TRENDS

- What you need to know

Rise in health fanatics

- Health is at the top of Thai consumers' minds with a rising demand for affordable nutrition
 - Graph 2: top three most important factors considered when choosing packaged food and/or drinks, 2022
- Not all about price: value is perceived in products with added health benefits
 - Graph 3: indicators that a food and drink product is good value for money, 2022
- Consumers are rationalising the added nutrition in food and drinks
- Mintel Trend: Free-from
- Consumers are relying on brands to guide them towards healthy product choices
- To meet consumers' rising demand for health functionality, the Thai functional food/drink market is growing steadily along with other APAC markets
 - Graph 4: functional claims in food and drink products, by market, 2019-22
- Consumers seek food and drink innovations that cater to their individual needs

Emergence of premium consumers

- The premium market trumps the inflation crisis due to its extra value
- Mintel Trend: Trading Up

Evolution of snacking

- COVID-19 has driven an increase in consumers' snacking behaviour
- A rising demand for healthy snacking
 - Graph 5: qualities looked for in a snack*, 2022

Rise in adventurous and indulgent consumers

- Experiences are gaining higher price tags
- New experiences are sought out in flavour novelty
- Consumers seek unguilty pleasures

CONSUMER INSIGHTS

- What you need to know

Consumption of processed meat by formats

- Chilled and frozen processed meat products have a wide penetration
 - Graph 6: consumption of select formats of processed meat products in the last six months, 2022
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 - Graph 7: consumption of different formats of processed meat products in the last six months, 2022
- Three types of processed meat consumers
 - Graph 8: repertoire of different types of processed meat, 2022
- Three types of processed meat consumers
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 - Graph 9: consumers who plan to eat processed meat regularly, by consumer segments, 2022

Motivate consumption with better-for-you offerings

- Nutritional value precedes indulgence
 - Graph 10: top three most important factors considered when choosing processed meat products, 2022
- High protein content will meet the nutritional expectations of Enthusiasts
 - Graph 11: any rank 'nutritional value' as top three important factor when choosing processed meat product, by enthusiasts, vs total, 2022
- Processed meat product launches with high-protein claims remain limited in Thailand
- Take inspiration from global brands in innovating around nutrient boosts
- An enhanced better-for-you image: prebiotic chicken nuggets with vegetable coating
- Functional benefits will motivate consumption among Enthusiasts

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- Graph 12: consumers who would be motivated to eat more processed meat products if they included health benefits, by Enthusiasts vs total, 2022
- Link nutrition to the provision of multifunctional benefits
- Health and food safety concerns limit consumption of processed meat
 - Graph 13: agreement with select statements, by Sceptics vs total, 2022
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 - Graph 14: any rank, 'low sodium' and 'low fat' as a top three important factor when choosing a processed meat product, by consumer segments vs total, 2022
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Drive premiumisation with clean labels and transparency

- Processed meat products that are free from undesirable ingredients are appealing to Enthusiasts
 - Graph 15: any rank, 'clean labels' as a top three important factor when choosing a processed meat product, by Enthusiasts vs total, 2022
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 - Graph 16: consumers who would be motivated to eat more processed meat products if they were made of all-natural ingredients, by consumer segments, 2022
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- Take inspiration from global brands on communicating clean consumption
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 - Graph 17: any rank, 'place of origin' as an important factor when choosing processed meat products, by Enthusiasts vs total, 2022
- CPF provides 100% natural products with transparent sourcing information

Enhance excitement by dialing up flavoured innovations

- Enthusiasts prefer flavoured processed meat
 - Graph 18: consumers who choose flavoured processed meat products over plain ones, by Enthusiasts vs total, 2022
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 - Graph 19: share of product launches in the processed meat category, by top 10 flavours, 2019-22
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 - Graph 20: interest in trying processed meat products that feature foreign cuisine flavours, by consumer segments, 2022
- Offer Japanese and Korean flavoured processed meat

Position for different daypart occasions

- Enthusiasts are driving snackification of processed meat
 - Graph 21: consumers who consume snackable processed meat products in-between meals, by consumer segments, 2022
- Enthusiasts seek a mess-free and convenient snacking experience
 - Graph 22: interest in trying processed meat products with select features, by consumer segments, 2022

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- Position in the kids' snacking space with snack packs that tailor to the nutritional needs of kids
- Enthusiasts are driving the relevance of processed meat for the breakfast occasion
 - Graph 23: interest in trying processed meat products that are created as a breakfast meal, by Enthusiasts vs total, 2022
- Inspiration for developing a breakfast meal: nuggets for breakfast!
- Primo Scrambles: "The breakfast of your dreams"

APPENDIX

- Consumer research methodology

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