

# SUSTAINABILITY IN PACKAGED FOODS – THAI CONSUMER – 2022

Focus on motivating Gen Z to eco-engage while catering to the sustainable diets of older Thais and integrating sustainability into brands' ethos.



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# Sustainability In Packaged Foods – Thai Consumer – 2022

## This report looks at the following areas:

- The importance of sustainability and various factors on consumers' food and drink decision-making process
- Consumers' understanding of sustainability in food and drinks
- Consumers' personal responsibility towards the environment
- Sustainable food and drink choices that consumers are actively engaging in
- Factors that would motivate consumers to make sustainable food and drink choices
- Consumers' attitudes towards sustainable food and drinks
- Features related to sustainability that consumers are willing to pay more for in food and drinks



Focus on motivating Gen Z to eco-engage while catering to the sustainable diets of older Thais and integrating sustainability into brands' ethos.

## Overview

Environmental considerations and ethics are not at the top of Thai consumers' minds when they make food and drink choices. They are preceded by **health, value, taste, convenience and price**. However, sustainability is relevant and its importance is rising, especially for older Thais (Older Millennials and Gen X).

31% of Thais agree with the statement '*I have been learning more about the importance of sustainable food and/or drinks*' and this is significantly higher among older Thais. Increased

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learning is building their awareness regarding the consequences of climate change, which is leading them towards making sustainable food and drink choices. Mintel sees Older Millennials and Gen X as change creators. They are willing to make sacrifices to their diets in order to protect the environment.

To remain future-fit, it will be important for food and drink brands to fit with the sustainable diet choices of the change creators. This includes meeting their needs for foods that are all clean and natural, extending to their consumption of organic food and drink options and increased consumption of plant-based alternatives, as their meat consumption reduces.

Lastly, while Gen X are willing to make sacrifices to their diets in order to protect the environment, they also hold desires and expectations for more food and drink brands to act sustainably and create change.

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# Report Content

## EXECUTIVE SUMMARY

- Mintel's perspective

### Key issues covered in this Report

- Overview
- The impact of COVID-19 on sustainability in packaged foods
- Gen Z lacks personal responsibility in making sustainable food and drink choices
  - Graph 1: agreement with the statement "It is my responsibility to make sustainable food and/or drink choices that protect the environment", by generation, 2022
- Health-consciousness among Gen X drives the importance of sustainable food and drinks
- Gen X expects brands to also take responsibility in acting sustainably

### Mintel predicts

- The outlook for sustainability in packaged foods
- The marketing mix
- Quick download resources

## KEY TRENDS

- What you need to know

### Growing awareness regarding climate change

- Mintel Trend: Climate Complexity
  - Graph 2: environmental/social issues of importance, 2022
- Thailand's extreme weather events are driving the importance of sustainable practices
- Food and drink brands are setting up net-zero sustainability goals to tackle climate change issues
- Initiatives to cut down carbon emissions are building awareness regarding the climate consequences of unsustainable production
- Addressing SDGs takes a global village
- ASEAN's largest sustainability expo, held in Thailand in 2022, builds consumer awareness of brands' sustainability initiatives

### Eco-consciousness drives plant-based trend

- Powerful global vegan campaigns illustrate animal cruelty and urge consumers to follow plant-based diets
- Shifting from carnivorous to omnivorous: Thais are reducing their meat consumption
  - Graph 3: change in dietary preference, 2021-22
- Appealing consumers to save the environment through meatless consumption

## Desire to minimise plastic waste

- Mintel Trend: Rethink Plastic
- Brands are eliminating usage of single-use plastic items in food and drinks
- Development of edible packaging on the rise as brands look to eliminate single-use plastic items
- Thailand initiates a plastic waste management program

## The rising need for authentic marketing

- Mintel Trend: Prove It

## CONSUMER INSIGHTS

- What you need to know

### Importance and understanding of sustainability in food and drink

- Sustainability is not at the top of consumers' minds when choosing food and drinks
  - Graph 4: top three most important factors considered when choosing packaged food and/or drinks, 2022
- Gen Z are the least engaged in making sustainable food and drink choices
  - Graph 5: sustainable food and drink choices that consumers are doing now and intend to do in the next year, by generation, 2022
- Gen Z don't feel personally responsible to make sustainable food and drink choices
  - Graph 6: agreement with the statement "It is my responsibility to make sustainable food and/or drink choices that protect the environment", by generation, 2022
- Sense of personal responsibility towards the environment is influenced by spending power
  - Graph 7: agreement with select statement 'It is my responsibility to make sustainable food and/or drink choices that protects the environment', by financial situation, 2022
- Sustainable food and drink is growing in importance among older Thais as they learn more about it
  - Graph 8: agreement with the statement "I have been learning more about the importance of sustainable food and/or drinks", by generation, 2022
- The health-consciousness of Gen X is driving the importance of sustainable food and drinks
  - Graph 9: selection of 'leading a healthy lifestyle' as a factor that would motivate consumers to choose more sustainable food and drink products (any rank – top three), by generation, 2022
- Increased learning is building awareness about the environmental consequences of personal food and drink choices
  - Graph 10: agreement with select statements, by consumers who "have been learning more about the importance of sustainable food and/or drinks" vs total, 2022
- Sustainable consumers: Older Millennials and Gen X will be the change creators
  - Graph 11: agreement with select statement regarding sustainability in packaged foods, by generation, 2022

### The sustainable diet choices of change creators

- The need for clean and natural products will drive Gen X towards sustainable food and drinks

- Graph 12: agreement that "avoiding chemicals/pesticides used in certain foods (eg antibiotics in livestock)" would motivate the choice of sustainable food and drink products (any rank), by generation, 2022
- Innovate by using organic ingredients as change creators opt for organic options in account of the environment
  - Graph 13: willingness to pay more for organic ingredients, by consumers willing to change dietary habits in order to protect the environment vs total, 2022
- Opportunity for plant-based protein alternatives to drive appeal as meat consumption reduces
  - Graph 14: willingness to pay more for plant-based protein alternatives, by consumers willing to change dietary habits in order to protect the environment vs total, 2022

### Expectations for brands to act sustainably

- Gen X expects brands to also take on responsibility in acting sustainably
  - Graph 15: agreement with select statement, by generation, 2022
- Gain loyalty with sustainability goals: reduce carbon footprint, conserve biodiversity and go plastic-free
  - Graph 16: agreement with select statement, by consumers who would like to see more food and/or drink brands act sustainably vs total, 2022
- Prove validity of sustainability claims to build trust
  - Graph 17: agreement with select statement, by consumers who would like to see more food and/or drink brands act sustainably vs total, 2022
- Enhance value with biodegradable packaging to help consumers manage packaging waste
  - Graph 18: willingness to pay more for biodegradable packaging, by consumers that would like to see more food and/or drink brands act sustainability, vs total, 2022
- Provide transparent and traceable sourcing information
  - Graph 19: willingness to pay more for traceability information (eg QR codes that tell the food's journey from sea/farm to supermarket), by consumers who would like to see more food and/or drink brands act sustainability vs total, 2022

## MARKET APPLICATIONS

- Key areas of opportunities

### Opportunity 1: empower Gen Z to make sustainable food and drink choices

- Nescafé India inspires Gen Z activists to turn talk into action
- Impossible Foods educates Gen Z in the difference they can make
- 'Eco-incentivise' Gen Z with rewards

### Opportunity 2: connect sustainability to a healthy lifestyle

- Limited use of ethical & environmental claims in food and drink launches
  - Graph 20: share of food and drink product launches, by top 10 claim categories, 2019-22
- Dial up the communication of health claims on sustainable food and drinks
  - Graph 21: share of food and drink product launches making sustainable claims, by those that are also making health claims, 2019-22

- Increase use of organic claims across food and drink categories
  - Graph 22: share of product launches with organic claims, by food and drink category, 2019-22
- Exemplify the multi-layered benefits of organic foods
- Help consumers snack with a good conscience: organic, indulgent, permissible and nutritional
- Promote the nutritional and functional health benefits of plant-based protein
- The growing range of plant-based meat alternatives meets the sustainable diet of change creators
  - Graph 23: share of meat substitute launches, 2017-22

### **Opportunity 3: make sustainability integral to brand ethos**

- Build credibility of sustainability claims: Thai Union Group partners with Sustainable Fisheries Partnership to open up supply chain for auditing
- Provide traceable sourcing information through blockchain technology
- Simplify complex measurement protocols with sustainability scores on packaging
- Build the tangibility of brands' sustainability goals: provide carbon-neutral products
- Explicitly link biodiversity and carbon footprint
- Make biodiversity campaigns more actionable with a focus on key protected species
- Make biodiversity an extension of animal welfare
- Reduce plastic packaging: inspiration for providing reusable and returnable glass bottles
- Natural-looking pack materials instantly express eco-awareness
- Send a loud and proud message by shouting out sustainability

## **APPENDIX**

- Consumer research methodology

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