

# Plant-based food alternatives

## Future or Present?

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# Introduction

The plant-based food revolution is happening and seems to be here to stay. The latest survey from Rakuten Insight indicates that many of our panelists have tried plant-based alternatives, and some products have already been accepted into diets across our panel markets, such as milk, cheese & meats. Most consumers regularly consume these products several times a week or several times a month.

A key reason for consuming alternatives is healthiness. This is a core benefit in the food category which should indicate a lasting place for alternatives in our diets. Other reasons such as trends & animal welfare are not so lasting, or mainstream, compared to healthiness.

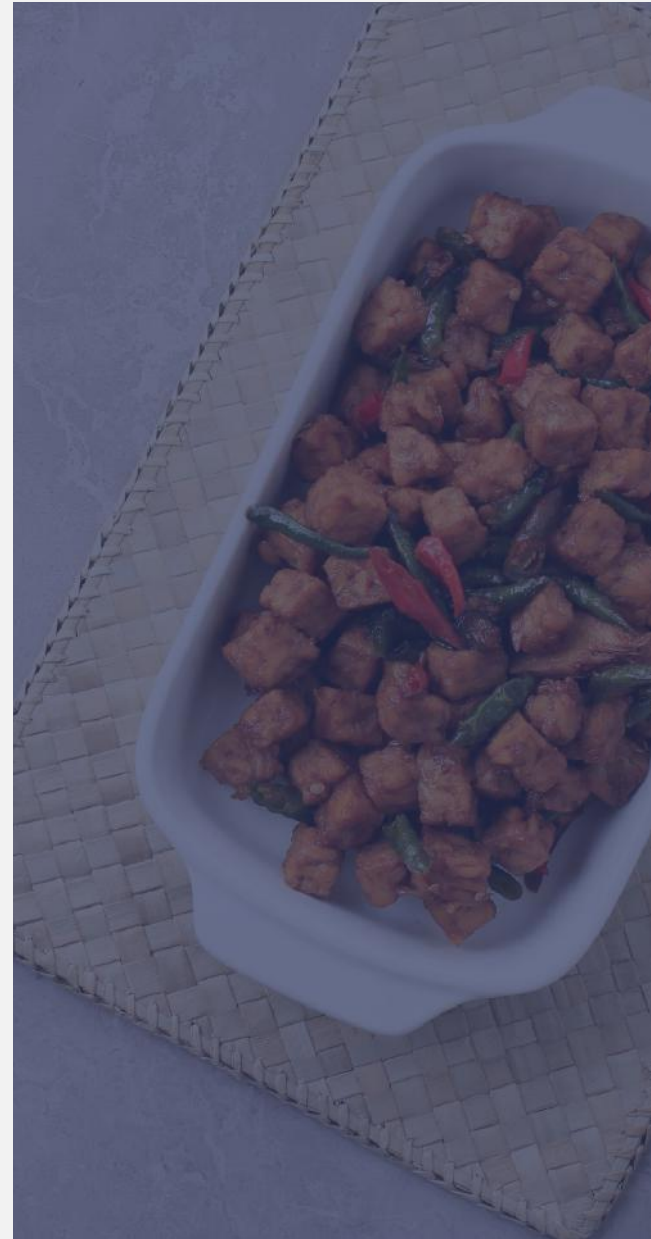
In addition, there appears to be no common deep-seated concern across markets. This would indicate that there is no longer a natural barrier to acceptance of plant-based diets.

There is a high willingness to try lab grown meat, which five years ago may have seemed unlikely. So the plant based alternative market seems to have arrived.

Gender differences largely depend on the cultural context in the market, whilst age groups differences appear to be more universal. This would make sense in that the expectations of target consumers are being defined by the local brands communicating their products. Gender differences in attitudes and behaviours are likely to change as the category and the communication develops.

Accordingly, consumer aware brands such as McDonald's have acted fast. McDonald's launched their first plant based vegan burger, McPlant, made with a plant-based patty co-developed with Beyond Meat® promising to recreate the much-loved taste of McDonald's but without the meat. The smart money would be that the McPlant and other alternative products will start as a success and become a staple part of the menu and our diets for years to come.

Neil Cattle, Regional Head EU





# Findings

## Plant-based food alternatives

Large numbers of consumers have already tried plant-based alternatives within part of their diet. Across all markets, awareness is high and those stating they have already tried are around 60-70%. Japan is an outlier, showing 38% have experienced plant based alternatives, however, this could be a challenge of culturally translating the concept in a market whose diet uses plant based alternatives as the norm e.g. Tofu or Soy.

## Most popular plant-based food alternatives

Plant based milk is the most tried alternative as in most markets, alternative milks have been present for a number of years and become a more usual purchase. Dairy products is next most popular, aside from Japan, South Korea & Taiwan where dairy is not such a large part of the daily diet. In Hong Kong (65%), Singapore (64%) & United States (62%), those who have tried alternative meats is surprisingly high.

## Drivers for choosing plant-based food

Trend, Animal Welfare & Healthier are 3 key reasons across markets for choosing plant based alternatives. Of the above reasons, healthiness is most interesting as this suggests an acceptance of a relevant, long-lasting rational & an emotional benefit. Whilst trends may come and go and animal welfare may be seen as more niche, healthiness in food is a stable, core benefit.

# Findings

## Main concerns around plant-based food

Equally there are no strong, consistent deeper concerns to plant-based alternatives. Some markets such as Japan (31%) and United States (33%) may have some taste concerns. Whilst some other markets may still need more awareness of the benefits or the need for alternatives.

However, there does not appear to be a cross-market deeper common barrier outside of the cultural environments. This would indicate that there is not a clear barrier to the continued rise of plant-based alternatives.

## Frequency of plant-based food consumption

Across markets, 'several times a week' or 'several times a month' is the most common consumption frequency. Only in Japan is this less common with 38% answering 'several times a year.' The perceived taste difference may be the key barrier to overcome in Japan.

## Lab-grown meat appeal

United States fits the Western image that lab-grown meat is not appealing to the majority (23%), but the more eco aware younger age groups show some interest, 16-24 (36%) & 25-34 (31%). However, interestingly this trend is not the same across Asia – with most markets around 40% willing. The 55+ age group is mostly not the target, however this age group can be surprisingly included as a target in China (45%) & South Korea (44%).



## About the survey

The survey was conducted online using Rakuten Insight proprietary panels with 124,100 respondents across 12 key markets within APAC. In addition, 5,900 responses from our US panel were added.

### Target

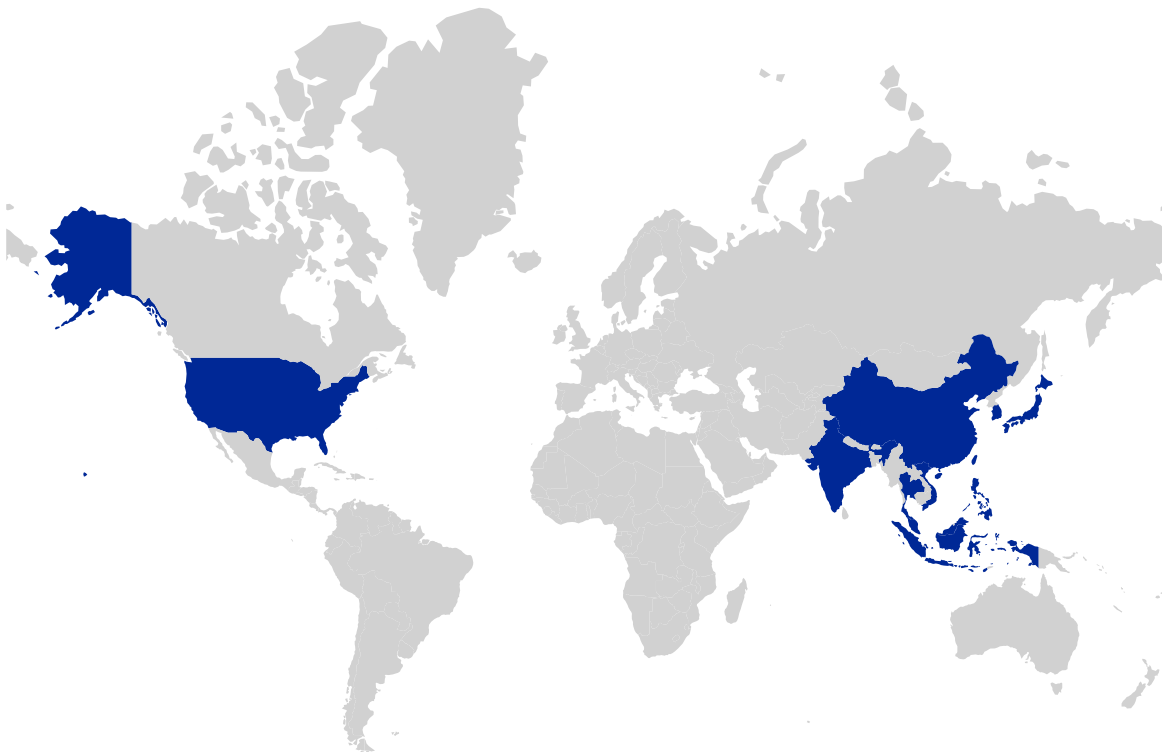
Male and Female, aged 16+

### Markets

 China	 Hong Kong	 India
 Indonesia	 Japan	 South Korea
 Malaysia	 Philippines	 Singapore
 Thailand	 Taiwan	 United States
 Vietnam		

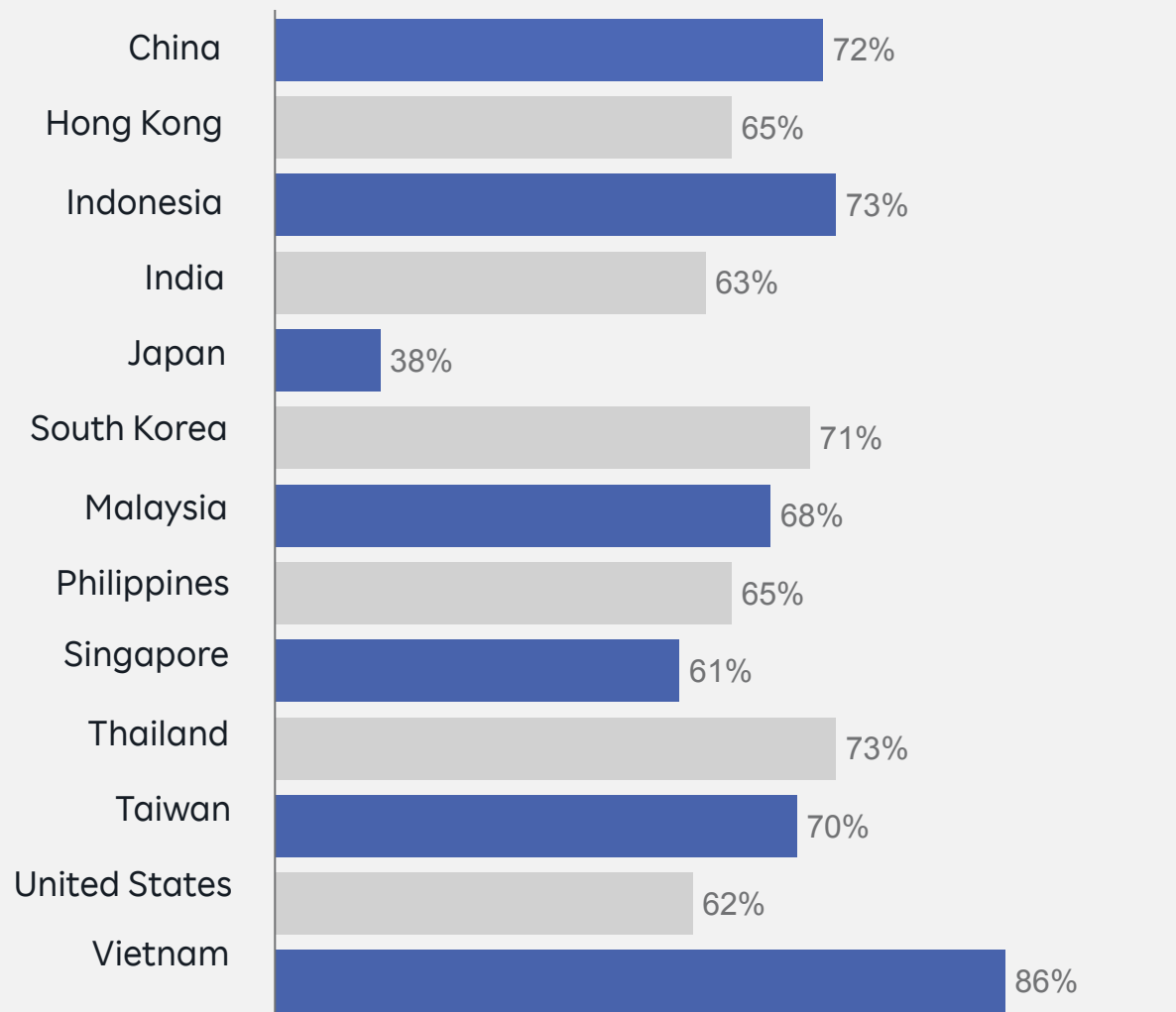
### Timing

12 - 30 November 2021



# Plant-based food alternatives to animal food

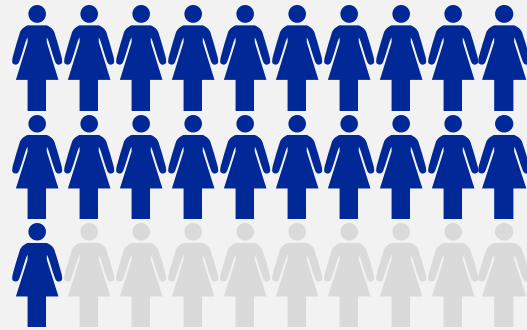
Have you ever consumed plant-based alternatives to animal-based food products (such as nut or rice milk, 'cheeses' made from nuts, plant-based burger patties or sausages, vegan gummi bears, etc.) - **YES**



## Plant-based food consumers

# 70%

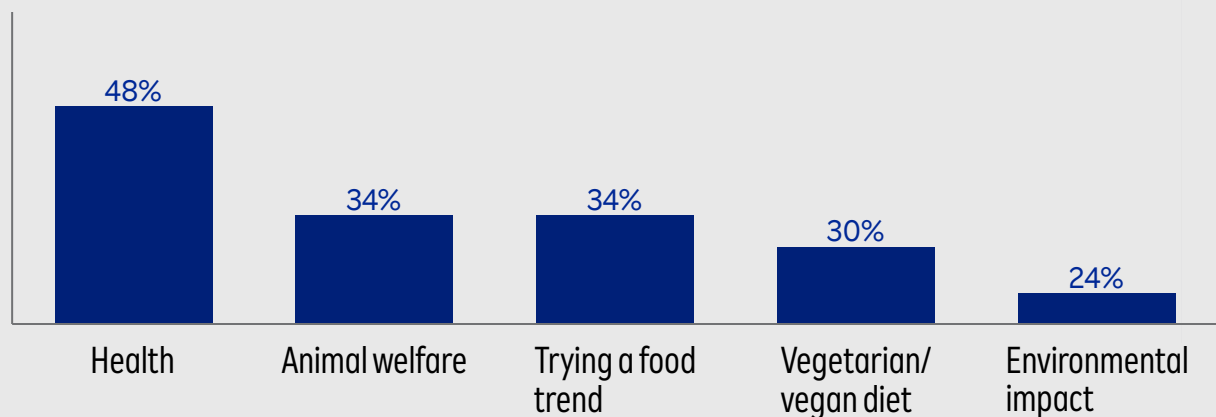
female have consumed plant-based alternatives to animal-based food products



**71% of Millennials** have consumed plant based alternatives

**29% of Gen-Zers** consume plant based alternatives at least several times per week

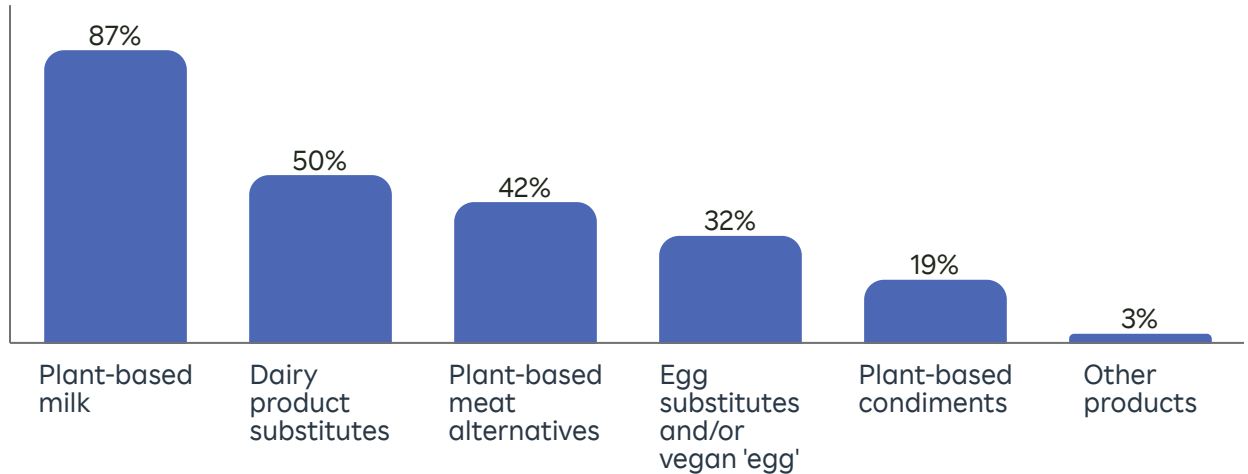
### Top 5 reasons for choosing plant based food





# China

## Which of these plant-based alternatives have you tried?



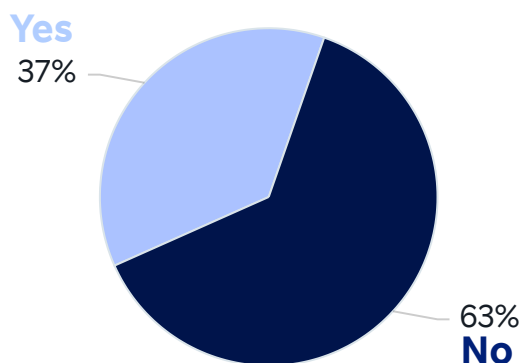
### Reason(s) for choosing plant-based alternatives

Concerns regarding animal welfare in food production	37%
Follow a vegetarian/ vegan diet	22%
Food allergies/intolerance or dietary restrictions on certain animal-based products (such as milk, gelatine, etc)	24%
Belief that plant-based products are healthier	47%
Concerns on environmental impact of livestock farming	22%
Plant-based products taste better	27%
I wanted to try a food trend	40%
Other reasons	9%

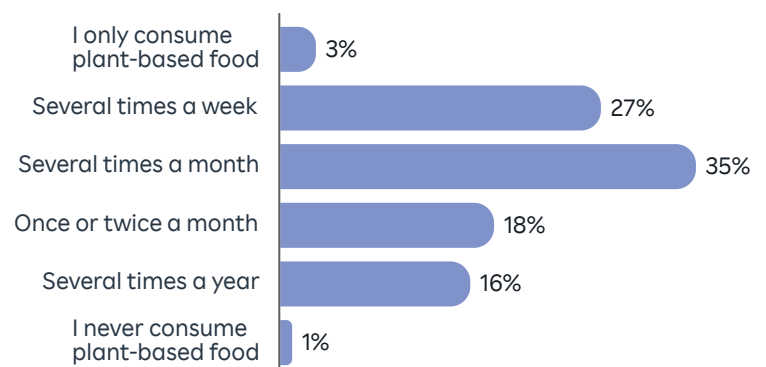
### Reason(s) for not eating plant-based alternatives

Plant-based alternatives do not taste as good as the original	29%
Not sure about the ingredients in the plant-based alternatives compared to the original	25%
It costs more than the original	19%
It is difficult to find where I live	20%
Belief that plant-based alternatives are not as healthy/nutritious	9%
Do not see the need for plant-based alternatives to animal-based food products	42%
Other reasons	12%

## Would you eat lab-grown meat?



## How often do you consume plant-based alternatives to animal food products?



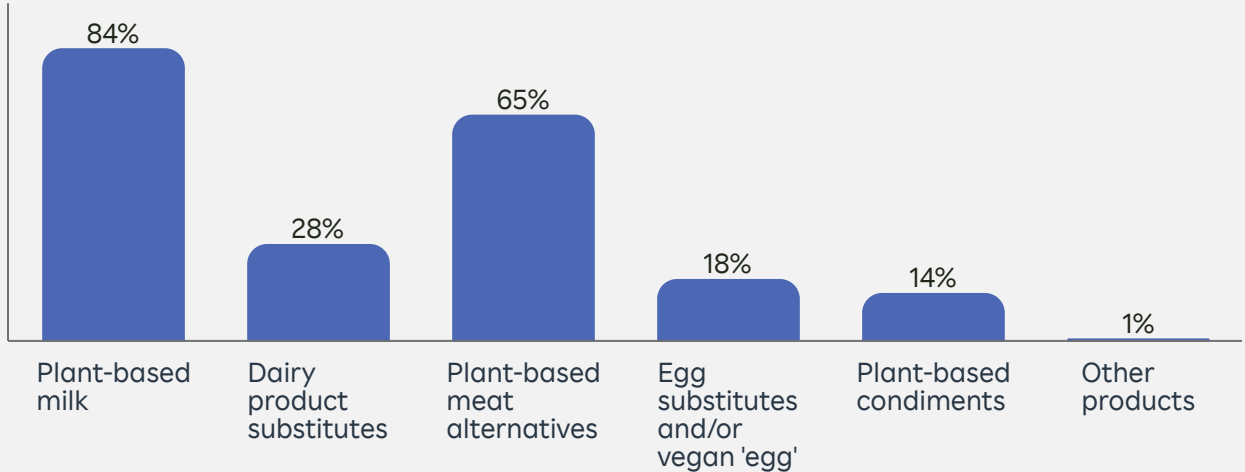
N = 5,071





# Hong Kong

## Which of these plant-based alternatives have you tried?



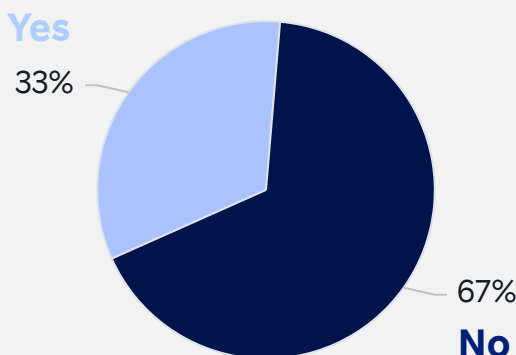
### Reason(s) for choosing plant-based alternatives

Concerns regarding animal welfare in food production	26%
Follow a vegetarian/ vegan diet	21%
Food allergies/intolerance or dietary restrictions on certain animal-based products (such as milk, gelatine, etc)	22%
Belief that plant-based products are healthier	46%
Concerns on environmental impact of livestock farming	24%
Plant-based products taste better	12%
I wanted to try a food trend	49%
Other reasons	4%

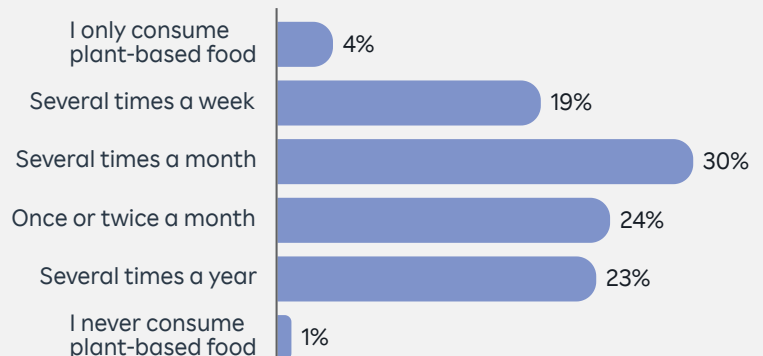
### Reason(s) for not eating plant-based alternatives

Plant-based alternatives do not taste as good as the original	29%
Not sure about the ingredients in the plant-based alternatives compared to the original	19%
It costs more than the original	34%
It is difficult to find where I live	18%
Belief that plant-based alternatives are not as healthy/nutritious	9%
Do not see the need for plant-based alternatives to animal-based food products	31%
Other reasons	10%

## Would you eat lab-grown meat?

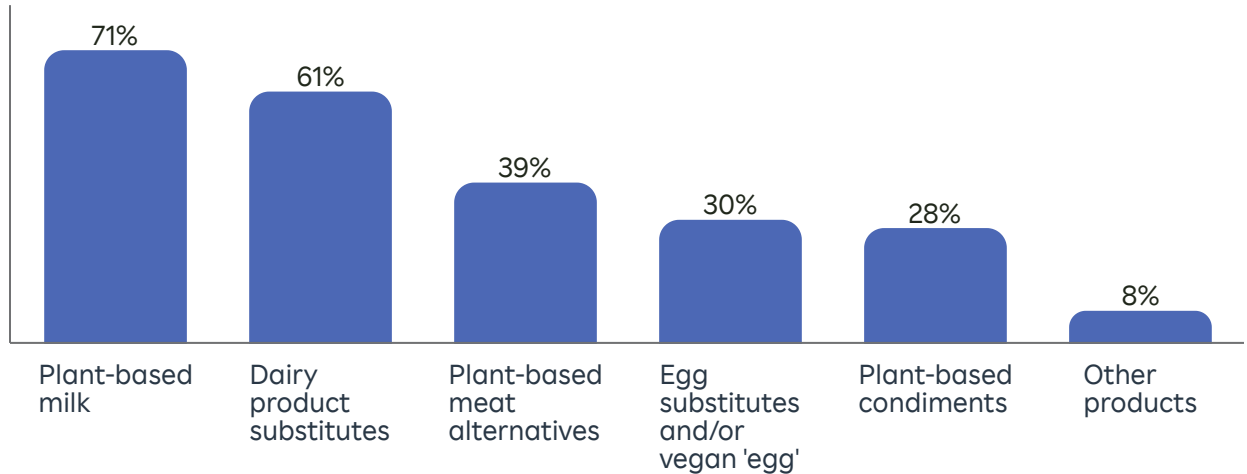


## How often do you consume plant-based alternatives to animal food products?





### Which of these plant-based alternatives have you tried?



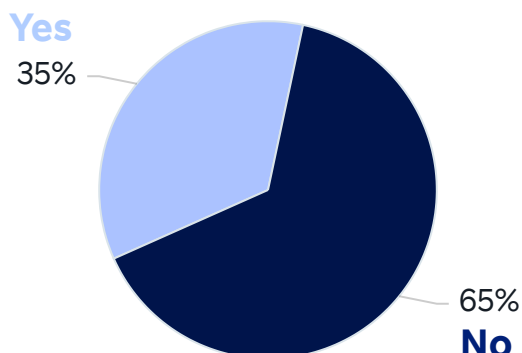
#### Reason(s) for choosing plant-based alternatives

Concerns regarding animal welfare in food production	48%
Follow a vegetarian/ vegan diet	44%
Food allergies/intolerance or dietary restrictions on certain animal-based products (such as milk, gelatine, etc)	33%
Belief that plant-based products are healthier	42%
Concerns on environmental impact of livestock farming	29%
Plant-based products taste better	26%
I wanted to try a food trend	24%
Other reasons	7%

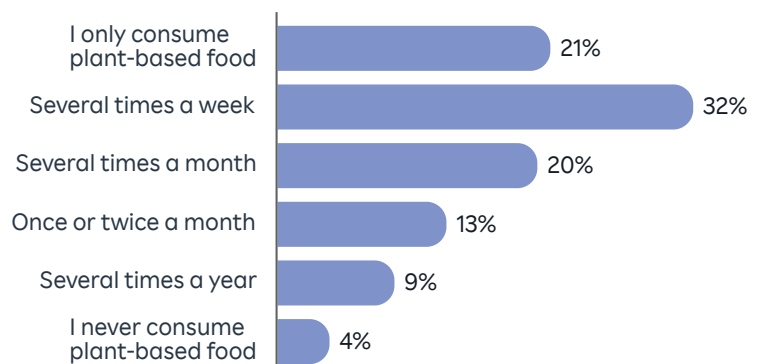
#### Reason(s) for not eating plant-based alternatives

Plant-based alternatives do not taste as good as the original	21%
Not sure about the ingredients in the plant-based alternatives compared to the original	26%
It costs more than the original	23%
It is difficult to find where I live	25%
Belief that plant-based alternatives are not as healthy/nutritious	8%
Do not see the need for plant-based alternatives to animal-based food products	23%
Other reasons	20%

### Would you eat lab-grown meat?



### How often do you consume plant-based alternatives to animal food products?



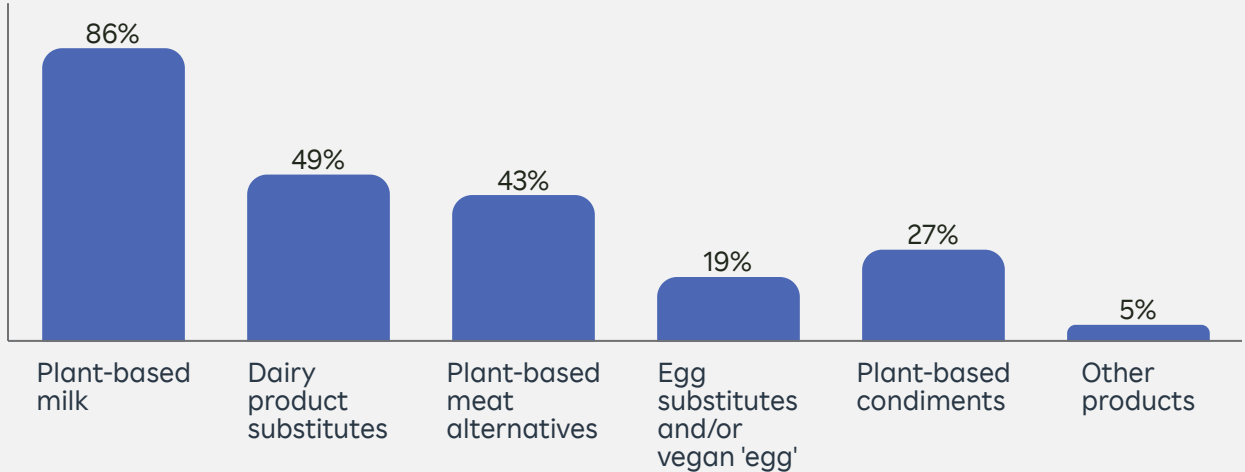
N = 38,637





# Indonesia

## Which of these plant-based alternatives have you tried?



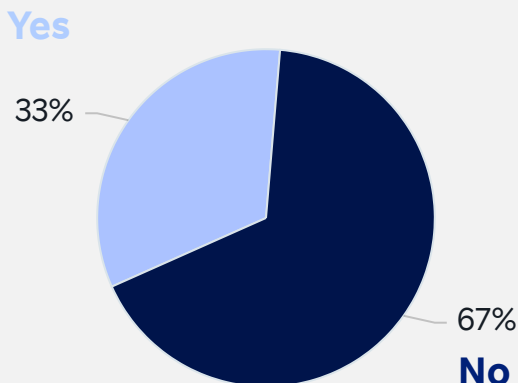
### Reason(s) for choosing plant-based alternatives

Concerns regarding animal welfare in food production	23%
Follow a vegetarian/ vegan diet	27%
Food allergies/intolerance or dietary restrictions on certain animal-based products (such as milk, gelatine, etc)	15%
Belief that plant-based products are healthier	53%
Concerns on environmental impact of livestock farming	14%
Plant-based products taste better	25%
I wanted to try a food trend	33%
Other reasons	8%

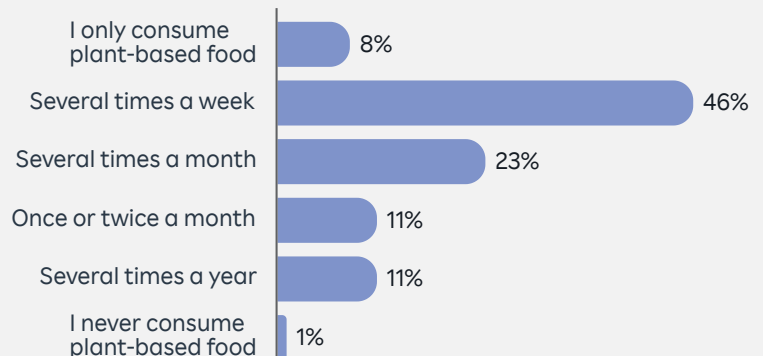
### Reason(s) for not eating plant-based alternatives

Plant-based alternatives do not taste as good as the original	23%
Not sure about the ingredients in the plant-based alternatives compared to the original	14%
It costs more than the original	37%
It is difficult to find where I live	30%
Belief that plant-based alternatives are not as healthy/nutritious	4%
Do not see the need for plant-based alternatives to animal-based food products	29%
Other reasons	11%

## Would you eat lab-grown meat?



## How often do you consume plant-based alternatives to animal food products?

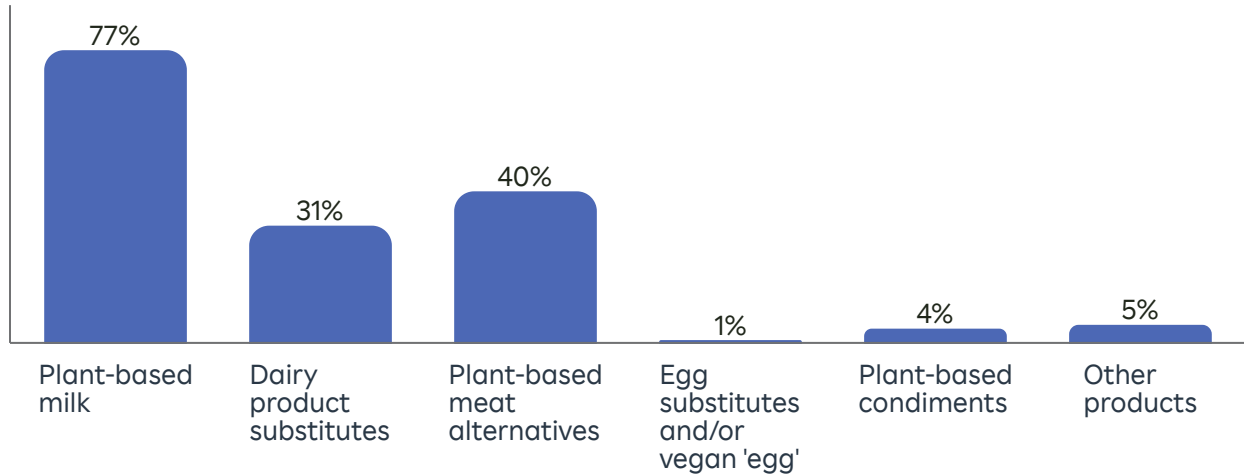


N = 11,657



# ● Japan

## Which of these plant-based alternatives have you tried?



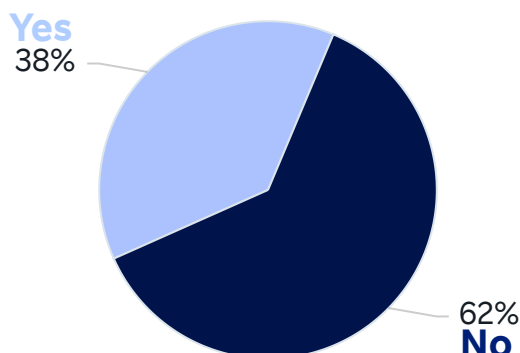
### Reason(s) for choosing plant-based alternatives

Concerns regarding animal welfare in food production	8%
Follow a vegetarian/ vegan diet	2%
Food allergies/intolerance or dietary restrictions on certain animal-based products (such as milk, gelatine, etc)	5%
Belief that plant-based products are healthier	51%
Concerns on environmental impact of livestock farming	8%
Plant-based products taste better	3%
I wanted to try a food trend	46%
Other reasons	13%

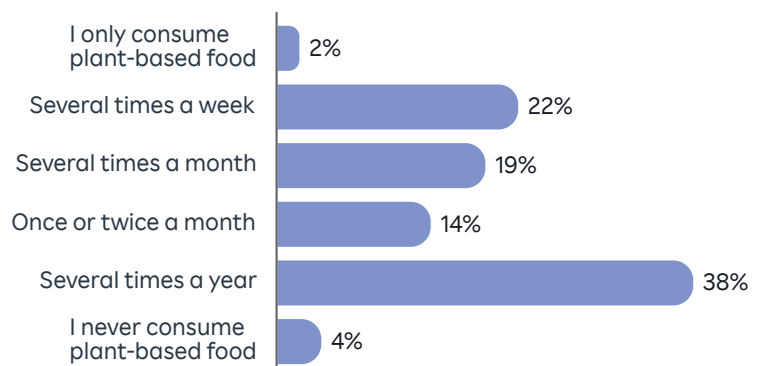
### Reason(s) for not eating plant-based alternatives

Plant-based alternatives do not taste as good as the original	31%
Not sure about the ingredients in the plant-based alternatives compared to the original	16%
It costs more than the original	25%
It is difficult to find where I live	19%
Belief that plant-based alternatives are not as healthy/nutritious	2%
Do not see the need for plant-based alternatives to animal-based food products	25%
Other reasons	14%

## Would you eat lab-grown meat?



## How often do you consume plant-based alternatives to animal food products?



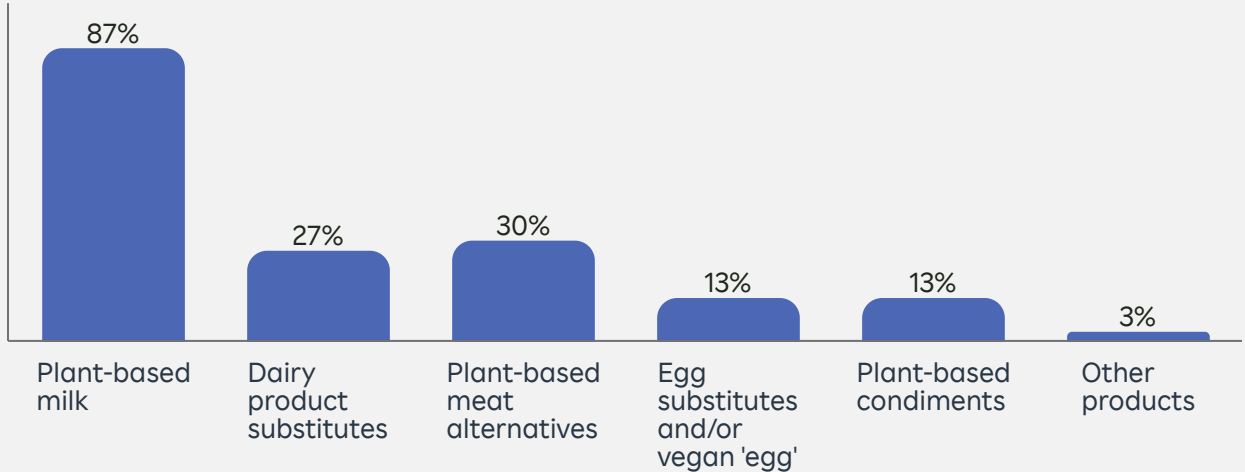
N = 781





# South Korea

## Which of these plant-based alternatives have you tried?



### Reason(s) for choosing plant-based alternatives

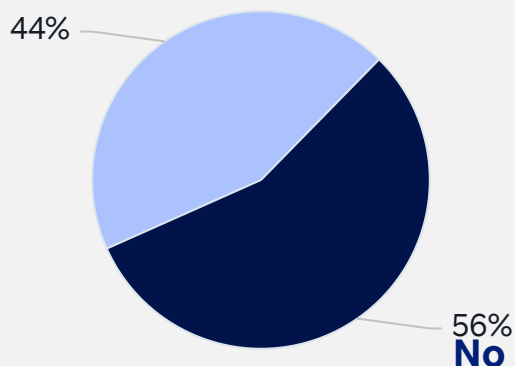
Concerns regarding animal welfare in food production	29%
Follow a vegetarian/ vegan diet	19%
Food allergies/intolerance or dietary restrictions on certain animal-based products (such as milk, gelatine, etc)	12%
Belief that plant-based products are healthier	50%
Concerns on environmental impact of livestock farming	15%
Plant-based products taste better	13%
I wanted to try a food trend	31%
Other reasons	7%

### Reason(s) for not eating plant-based alternatives

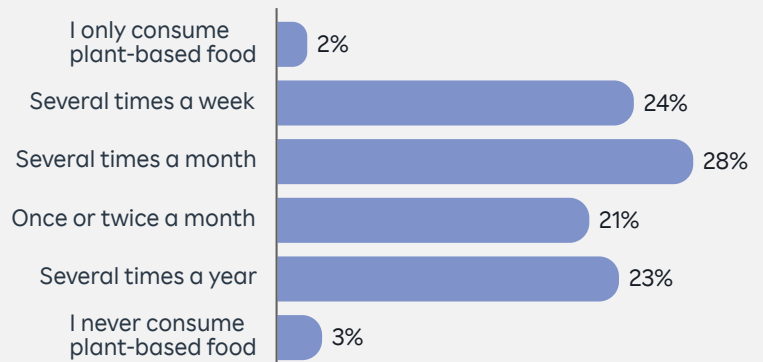
Plant-based alternatives do not taste as good as the original	27%
Not sure about the ingredients in the plant-based alternatives compared to the original	12%
It costs more than the original	31%
It is difficult to find where I live	22%
Belief that plant-based alternatives are not as healthy/nutritious	4%
Do not see the need for plant-based alternatives to animal-based food products	30%
Other reasons	10%

## Would you eat lab-grown meat?

Yes

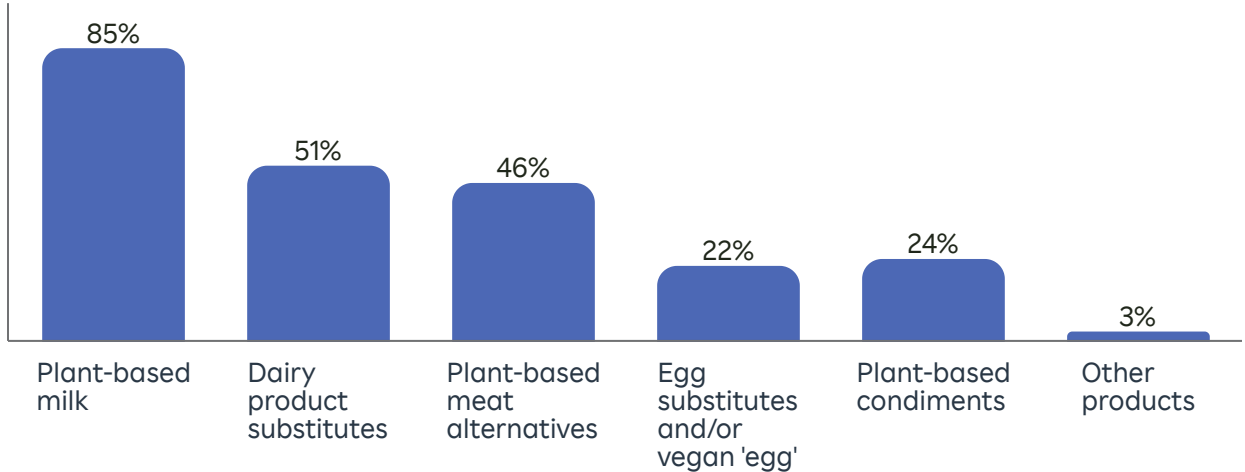


## How often do you consume plant-based alternatives to animal food products?





### Which of these plant-based alternatives have you tried?



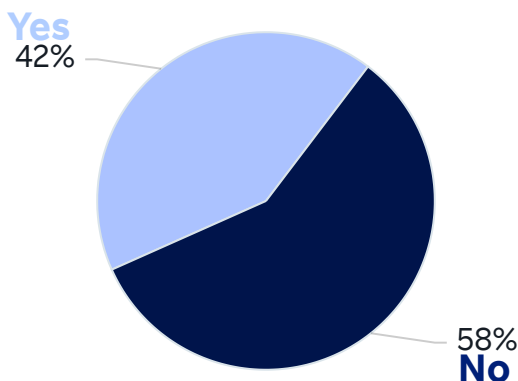
#### Reason(s) for choosing plant-based alternatives

Concerns regarding animal welfare in food production	32%
Follow a vegetarian/ vegan diet	30%
Food allergies/intolerance or dietary restrictions on certain animal-based products (such as milk, gelatine, etc)	22%
Belief that plant-based products are healthier	48%
Concerns on environmental impact of livestock farming	23%
Plant-based products taste better	19%
I wanted to try a food trend	40%
Other reasons	5%

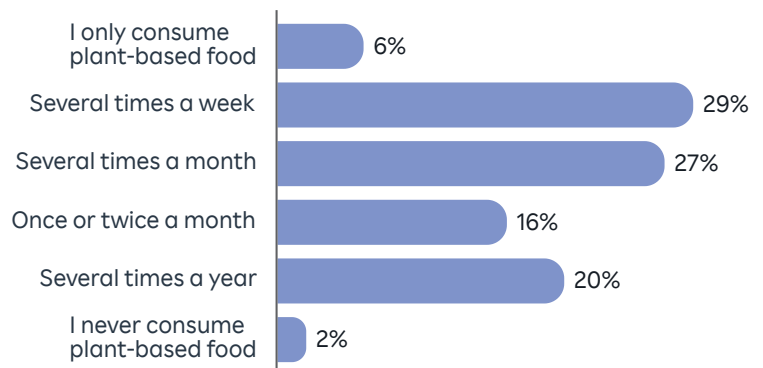
#### Reason(s) for not eating plant-based alternatives

Plant-based alternatives do not taste as good as the original	26%
Not sure about the ingredients in the plant-based alternatives compared to the original	30%
It costs more than the original	40%
It is difficult to find where I live	24%
Belief that plant-based alternatives are not as healthy/nutritious	5%
Do not see the need for plant-based alternatives to animal-based food products	25%
Other reasons	10%

### Would you eat lab-grown meat?



### How often do you consume plant-based alternatives to animal food products?



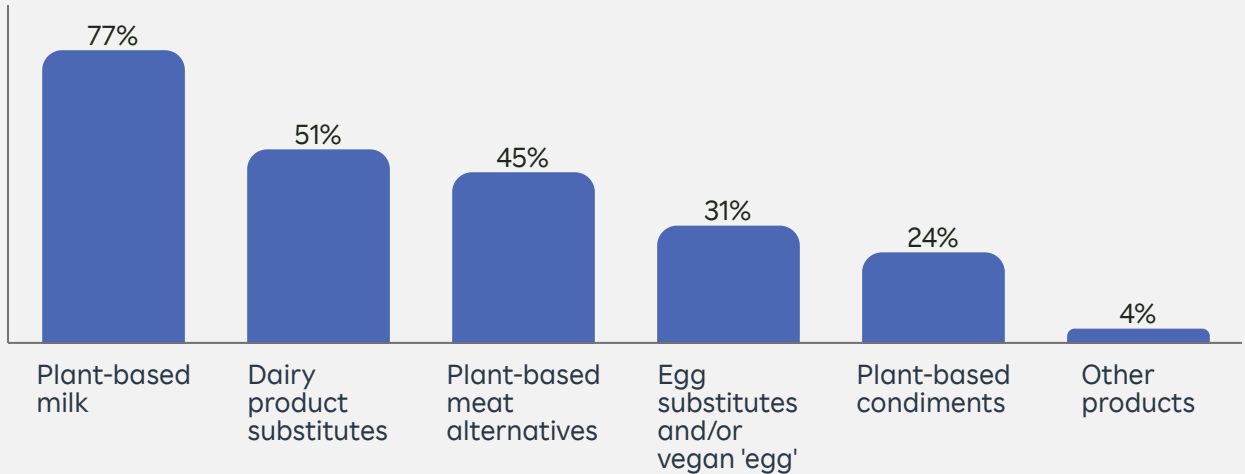
N = 9,563





# Philippines

## Which of these plant-based alternatives have you tried?



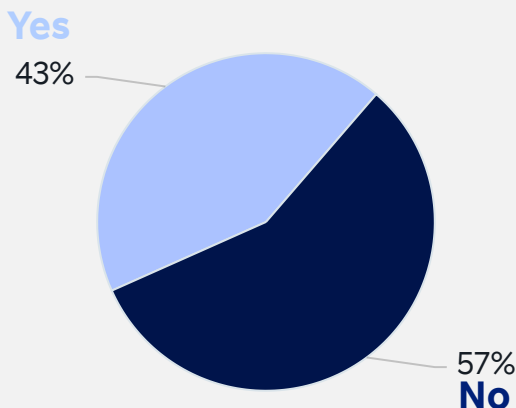
### Reason(s) for choosing plant-based alternatives

Concerns regarding animal welfare in food production	41%
Follow a vegetarian/ vegan diet	30%
Food allergies/intolerance or dietary restrictions on certain animal-based products (such as milk, gelatine, etc)	26%
Belief that plant-based products are healthier	56%
Concerns on environmental impact of livestock farming	28%
Plant-based products taste better	21%
I wanted to try a food trend	25%
Other reasons	4%

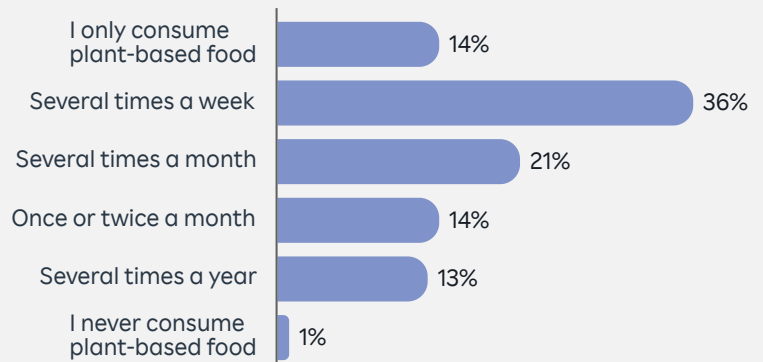
### Reason(s) for not eating plant-based alternatives

Plant-based alternatives do not taste as good as the original	20%
Not sure about the ingredients in the plant-based alternatives compared to the original	28%
It costs more than the original	25%
It is difficult to find where I live	28%
Belief that plant-based alternatives are not as healthy/nutritious	3%
Do not see the need for plant-based alternatives to animal-based food products	19%
Other reasons	17%

## Would you eat lab-grown meat?



## How often do you consume plant-based alternatives to animal food products?

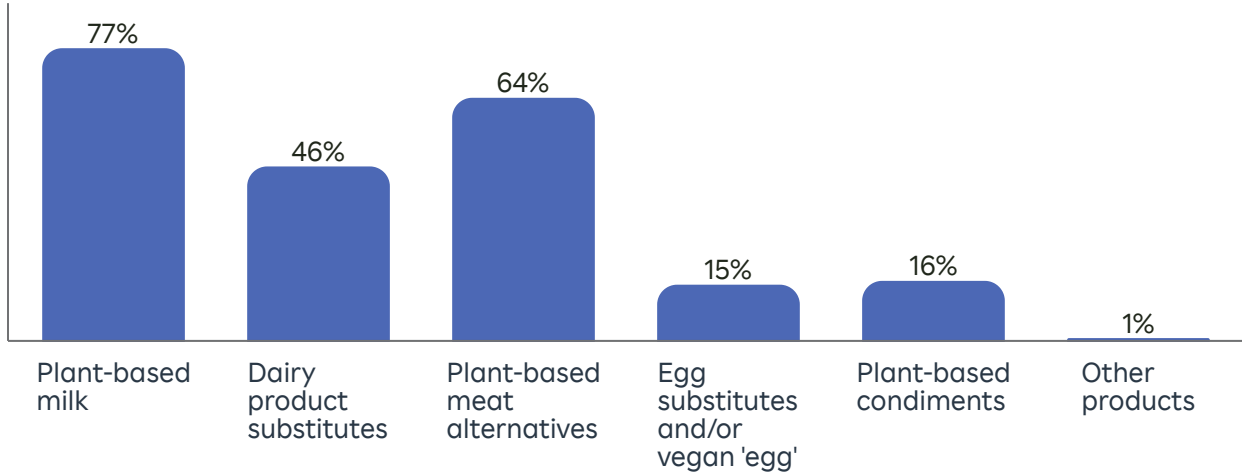


N = 14,185



# Singapore

## Which of these plant-based alternatives have you tried?



### Reason(s) for choosing plant-based alternatives

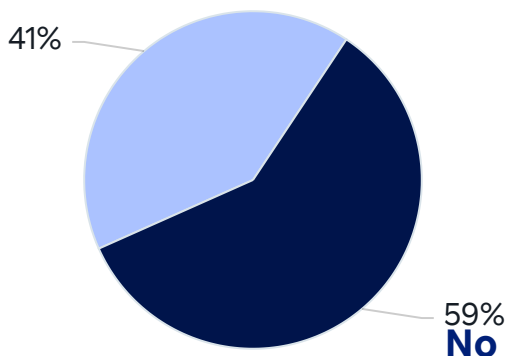
Concerns regarding animal welfare in food production	26%
Follow a vegetarian/ vegan diet	23%
Food allergies/intolerance or dietary restrictions on certain animal-based products (such as milk, gelatine, etc)	20%
Belief that plant-based products are healthier	35%
Concerns on environmental impact of livestock farming	25%
Plant-based products taste better	11%
I wanted to try a food trend	47%
Other reasons	7%

### Reason(s) for not eating plant-based alternatives

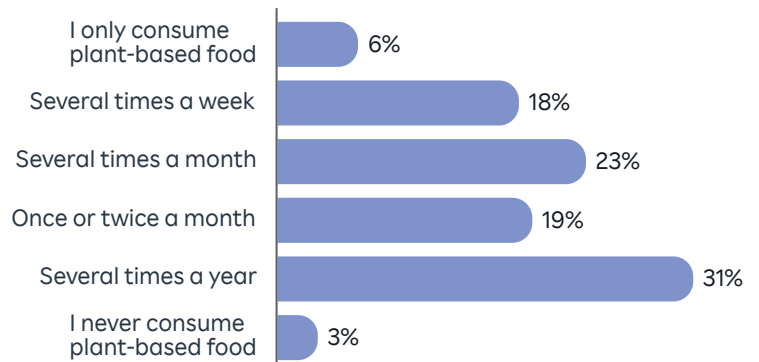
Plant-based alternatives do not taste as good as the original	23%
Not sure about the ingredients in the plant-based alternatives compared to the original	29%
It costs more than the original	47%
It is difficult to find where I live	16%
Belief that plant-based alternatives are not as healthy/nutritious	8%
Do not see the need for plant-based alternatives to animal-based food products	35%
Other reasons	6%

## Would you eat lab-grown meat?

Yes



## How often do you consume plant-based alternatives to animal food products?



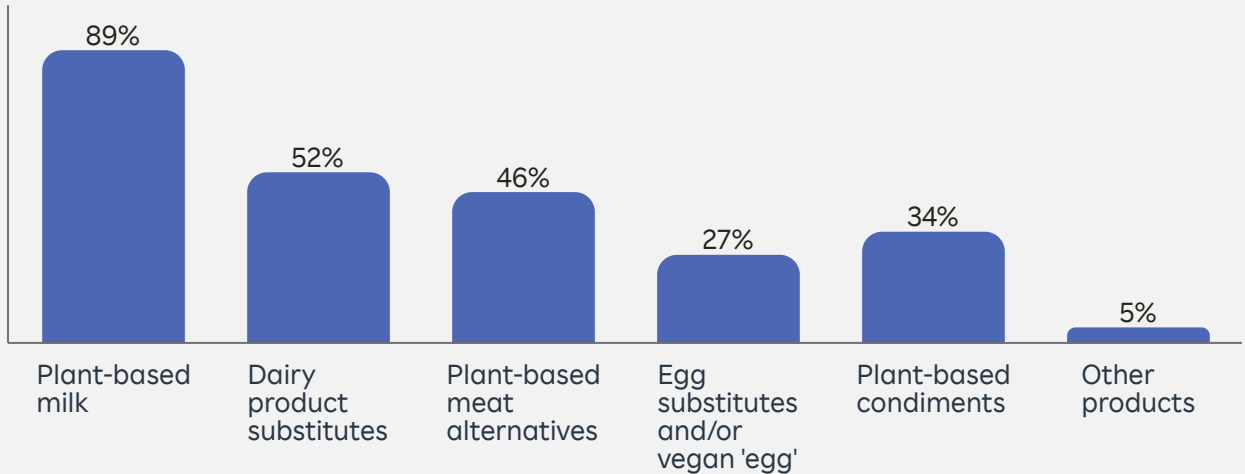
N = 4,709





# Thailand

## Which of these plant-based alternatives have you tried?



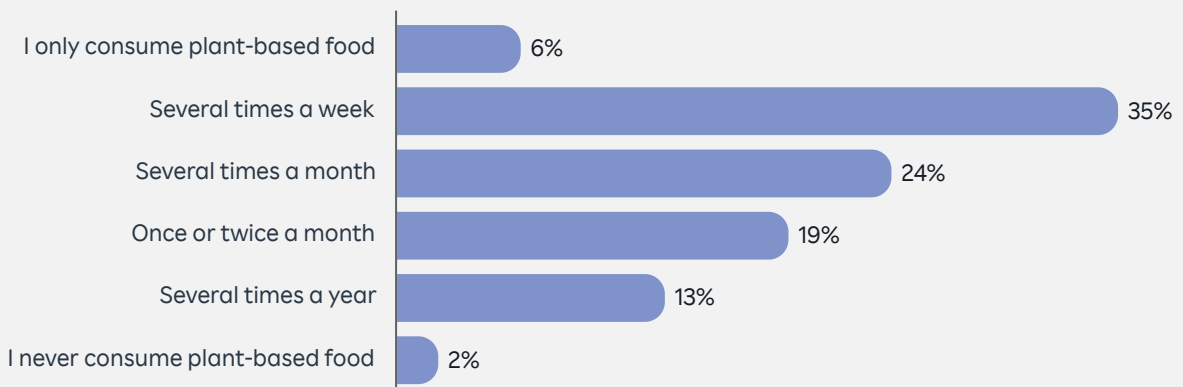
### Reason(s) for choosing plant-based alternatives

Concerns regarding animal welfare in food production	26%
Follow a vegetarian/ vegan diet	25%
Food allergies/intolerance or dietary restrictions on certain animal-based products (such as milk, gelatine, etc)	18%
Belief that plant-based products are healthier	62%
Concerns on environmental impact of livestock farming	20%
Plant-based products taste better	21%
I wanted to try a food trend	34%
Other reasons	8%

### Reason(s) for not eating plant-based alternatives

Plant-based alternatives do not taste as good as the original	24%
Not sure about the ingredients in the plant-based alternatives compared to the original	24%
It costs more than the original	31%
It is difficult to find where I live	34%
Belief that plant-based alternatives are not as healthy/nutritious	7%
Do not see the need for plant-based alternatives to animal-based food products	21%
Other reasons	15%

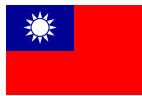
## How often do you consume plant-based alternatives to animal food products?



N = 11,772

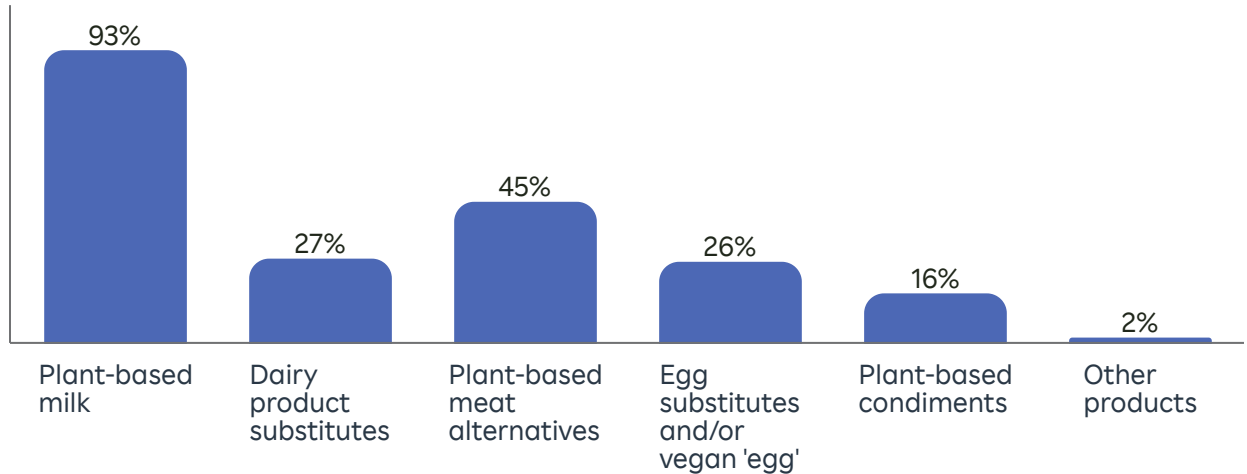






# Taiwan

## Which of these plant-based alternatives have you tried?



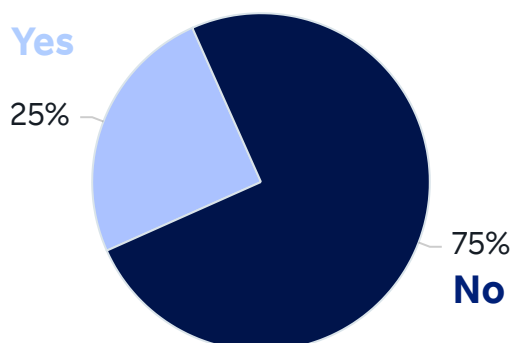
### Reason(s) for choosing plant-based alternatives

Concerns regarding animal welfare in food production	25%
Follow a vegetarian/ vegan diet	19%
Food allergies/intolerance or dietary restrictions on certain animal-based products (such as milk, gelatine, etc)	21%
Belief that plant-based products are healthier	43%
Concerns on environmental impact of livestock farming	23%
Plant-based products taste better	15%
I wanted to try a food trend	51%
Other reasons	5%

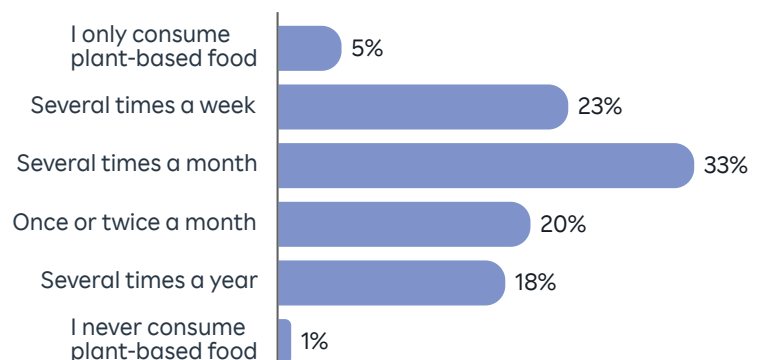
### Reason(s) for not eating plant-based alternatives

Plant-based alternatives do not taste as good as the original	28%
Not sure about the ingredients in the plant-based alternatives compared to the original	24%
It costs more than the original	28%
It is difficult to find where I live	17%
Belief that plant-based alternatives are not as healthy/nutritious	5%
Do not see the need for plant-based alternatives to animal-based food products	39%
Other reasons	9%

## Would you eat lab-grown meat?



## How often do you consume plant-based alternatives to animal food products?



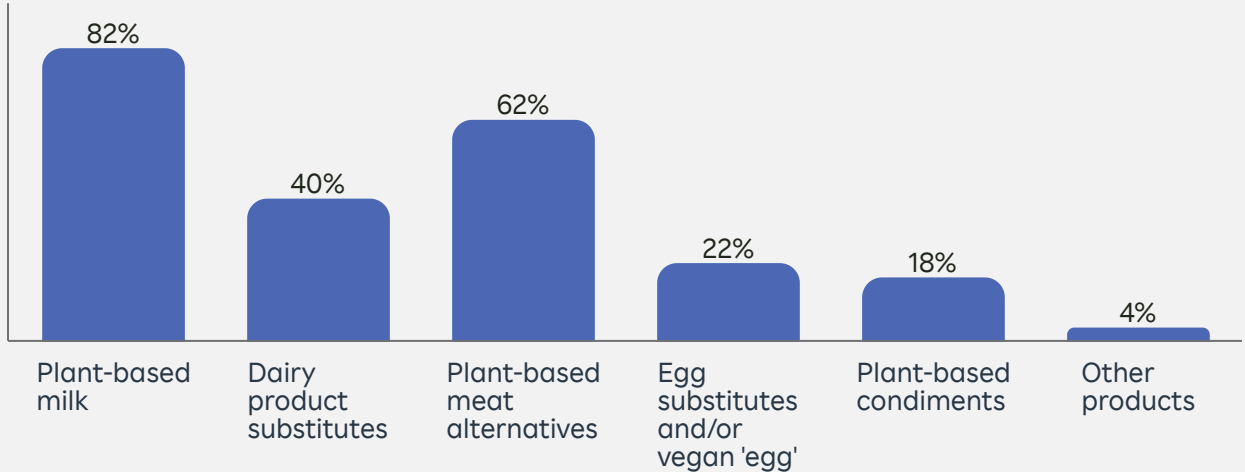
N = 12,039





# United States

## Which of these plant-based alternatives have you tried?



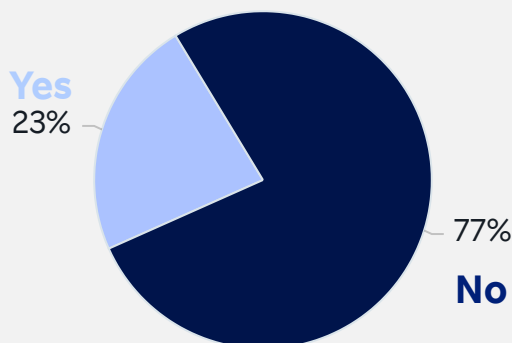
### Reason(s) for choosing plant-based alternatives

Concerns regarding animal welfare in food production	23%
Follow a vegetarian/ vegan diet	11%
Food allergies/intolerance or dietary restrictions on certain animal-based products (such as milk, gelatine, etc)	23%
Belief that plant-based products are healthier	35%
Concerns on environmental impact of livestock farming	18%
Plant-based products taste better	10%
I wanted to try a food trend	41%
Other reasons	15%

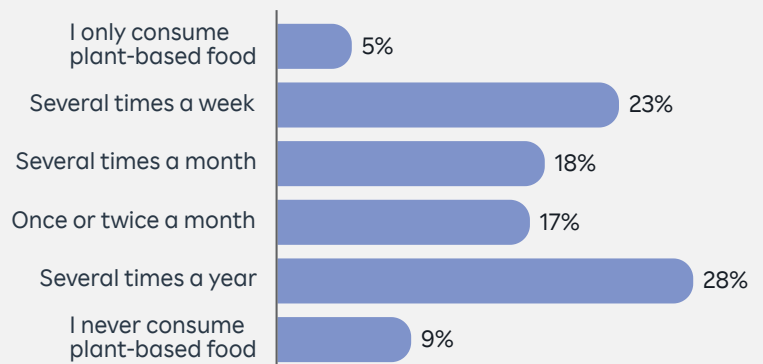
### Reason(s) for not eating plant-based alternatives

Plant-based alternatives do not taste as good as the original	33%
Not sure about the ingredients in the plant-based alternatives compared to the original	21%
It costs more than the original	30%
It is difficult to find where I live	7%
Belief that plant-based alternatives are not as healthy/nutritious	8%
Do not see the need for plant-based alternatives to animal-based food products	44%
Other reasons	13%

## Would you eat lab-grown meat?



## How often do you consume plant-based alternatives to animal food products?



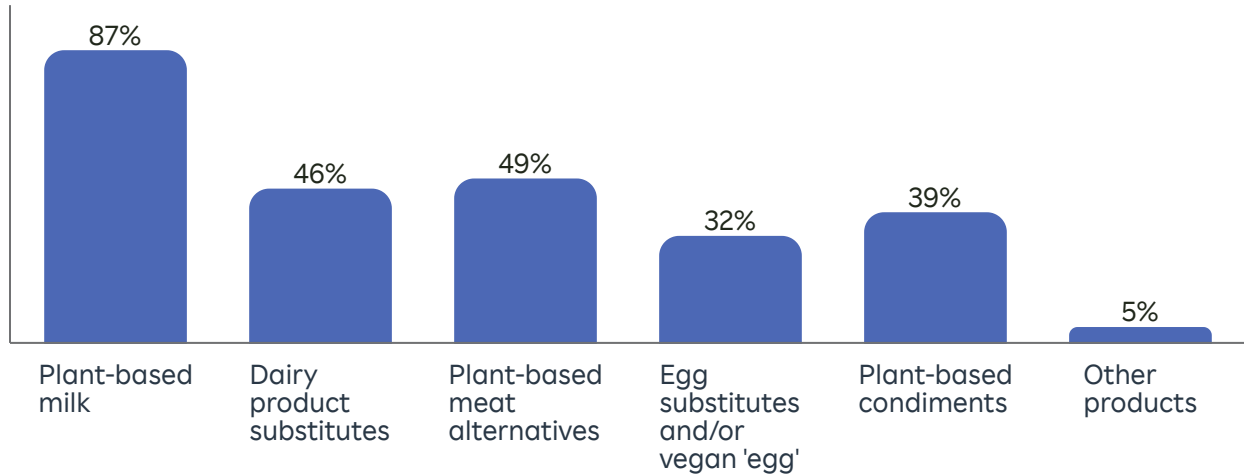
N = 5,939





# Vietnam

## Which of these plant-based alternatives have you tried?



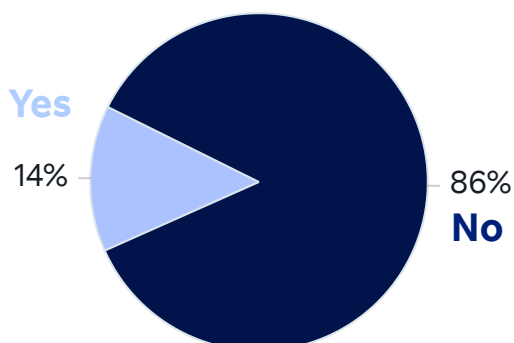
### Reason(s) for choosing plant-based alternatives

Concerns regarding animal welfare in food production	40%
Follow a vegetarian/ vegan diet	38%
Food allergies/intolerance or dietary restrictions on certain animal-based products (such as milk, gelatine, etc)	20%
Belief that plant-based products are healthier	61%
Concerns on environmental impact of livestock farming	32%
Plant-based products taste better	29%
I wanted to try a food trend	36%
Other reasons	4%

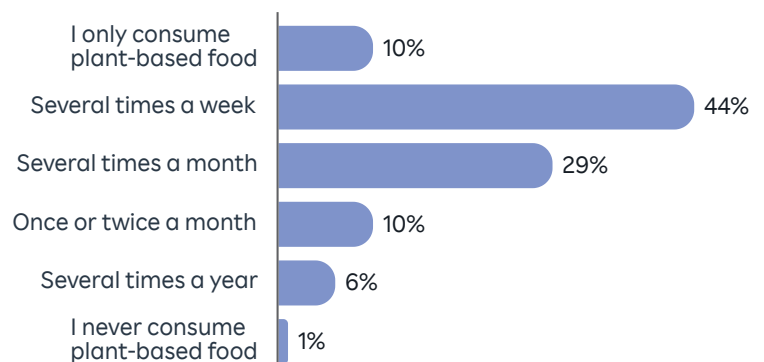
### Reason(s) for not eating plant-based alternatives

Plant-based alternatives do not taste as good as the original	29%
Not sure about the ingredients in the plant-based alternatives compared to the original	24%
It costs more than the original	24%
It is difficult to find where I live	39%
Belief that plant-based alternatives are not as healthy/nutritious	8%
Do not see the need for plant-based alternatives to animal-based food products	18%
Other reasons	14%

## Would you eat lab-grown meat?



## How often do you consume plant-based alternatives to animal food products?



N = 4,018



# Conclusion

## Plant-based food alternatives - Future or Present?

If we imagine this survey had been conducted 5 or 10 years ago, the findings would have been very different. At that time, plant-based food alternative market was seen as a near-certain future growth area.

Rakuten Insight's survey in November 2021 has shown that this prediction was accurate.

Many of Rakuten Insight's own panelists, across 13 markets, frequently consume plant-based alternatives with clear and relevant benefits such as healthiness accepted.

At the same time, there are no common deep-seated barriers for further growth. Indeed, there is a high willingness to try lab-grown meat.

Now in 2022, the future is present and the plant-based alternative market is all set for further growth.



# Rakuten Insight



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