

Market Intelligence Digest

Volume 2 Issue No. 40 | August 2020



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The Mintel logo, consisting of the word 'MINTEL' in a bold, sans-serif font inside a yellow speech bubble shape.

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Plant-based foods in a post-COVID-19 world

COVID-19 is drawing new attention to health, the safety of animal-based foods and the environment, which may propel the plant-based trend.



Mintel's perspective

Promote plant-based foods as ethical and safe

The zoonotic origin of COVID-19 is drawing attention to the safety of livestock production systems and the role they may play in the emergence of zoonotic disease. Such attention may encourage consumers to reconsider their protein choices in favor of plants.

Build familiarity into plant-based foods

To capture the attention and loyalty of 'new' consumers, producers can build elements of familiarity into plant-based foods. COVID-19 is propelling interest in 'local', and many plant-based foods lack provenance and authenticity.

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Ensure plant-based foods deliver on 'health'

COVID-19 has prioritized health for many consumers. Plant-based dieting is often seen as a 'healthy' diet; yet, plant-based meat and dairy alternatives can do more to align with health/nutrition, to capture the attention of consumers who will otherwise prioritize 'real' or 'whole' plant foods e.g., grains, seeds, nuts, and legumes.

The pace at which consumers refocus their diet around plants may be accelerated by COVID-19

'Plant-based' has been a significant trend of recent years and one that COVID-19 may accelerate in the longer term.

Firstly, COVID-19, like other zoonotic diseases, is thought to have 'jumped' from animals to humans, which may raise concern about the 'safety' of livestock production systems. The link between intensive livestock production systems and the emergence of diseases like COVID-19 may drive consumers to be more cautious in their choices where foods of animal origin are concerned.

COVID-19 has brought health to the fore, which could also prompt consumers to avoid foods of animal origin that are negatively linked to health, like processed meats. COVID-19 may thereby create an opportunity to capture the attention of consumers who previously saw no reason to venture into the plant-based space.

During COVID-19, the food industry is making plant-based food more accessible

- Dobra Karma, a vegan ready meal brand from Warsaw, Poland, was created in response to COVID-19.
- UK-based vegan brand Squeaky Bean has collaborated with other vegan food brands to launch a plant-based food box for delivery to consumers via the app Foodchain – usually only delivers to restaurants.



Squeaky Bean vegan food box is delivered via the app Foodchain (UK)

The emergence of many vegan foods during the past year, coupled with the agility of food brands during the outbreak as demonstrated above, reveal the potential for vegan food to become much more mainstream.

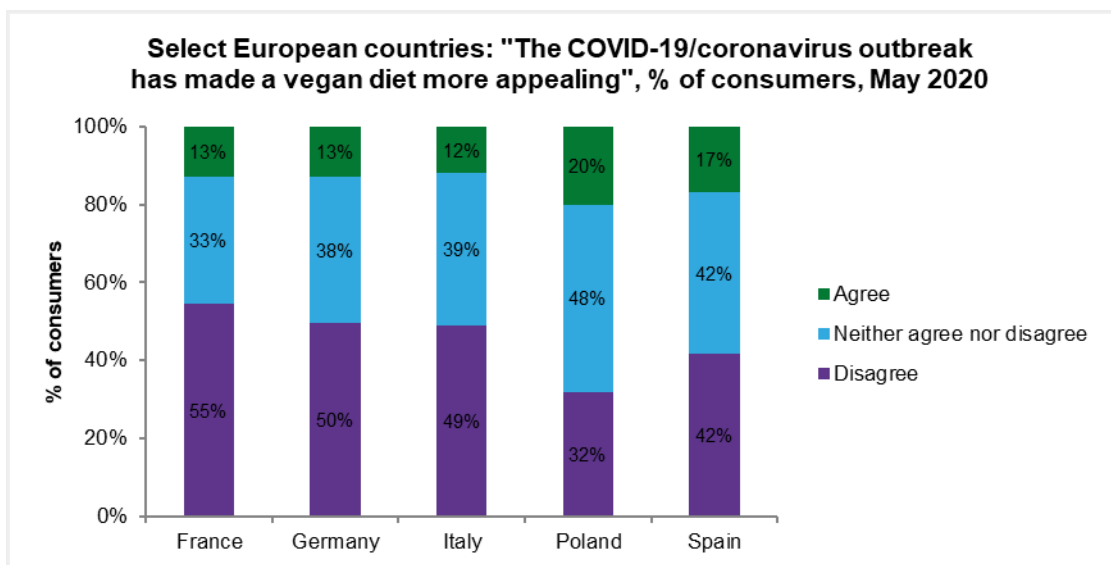
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COVID-19 has made veganism more appealing to some consumers

COVID-19 has prompted some new consumers to place their trust in plants, not animals; for example, 13% of consumers from France and Germany (and as high as 20% from Poland) agree that COVID-19 has made a vegan diet more appealing.

However, in most countries, veganism is – and will likely remain – niche. The biggest opportunity for 'plant-based' remains with flexitarian consumers who wish to refocus their diets around plants.



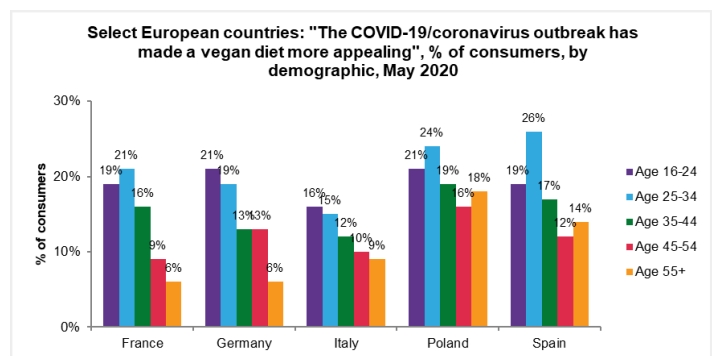
Base: internet users aged 16+, 2,000 in each country, 20 May 2020.

Source: Lightspeed/Mintel; Mintel's Impact of COVID-19 on Food & Drink research, May 2020

Amidst COVID-19, younger consumers remain the most attracted to veganism

Prior to COVID-19, veganism was more attractive to younger consumers than senior consumers – COVID-19 does not appear to have changed this.

For example, in May 2020, 19% of French consumers age 16-24 agreed that COVID-19 has made the vegan diet more appealing, compared with just 6% of French consumers age 55+. Mintel's Impact of COVID-19 on Food & Drink 2020 research, May 2020.



Base: internet users aged 16+, 2,000 in each country, 20 May 2020

Source: Lightspeed/Mintel; Mintel's Impact of COVID-19 on Food & Drink 2020 research, May 2020

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Promote plant-based foods as ethical and safe

COVID-19's zoonotic origin may provoke concern about the safety of animal-derived foods

In May 2020, 49% of Chinese consumers agreed that the safety of food products concerned them. COVID-19's alleged 'birthplace' in a Chinese 'wet market' has been well publicized, drawing significant attention to the safety of these wet markets.

Also under scrutiny is the trade of wildlife, due to reports that COVID-19 was transmitted to humans from wildlife, leading to questions regarding the hygiene conditions that allowed this to happen.

IN MAY 2020

49%

of Chinese consumers agreed that the safety of food products was a factor they were currently most concerned about

Base: 1,200 internet users aged 18-59, 26 Apr-2 May 2020
Source: KuRunData/Mintel; Mintel's Global COVID-19 Tracker

COVID-19 may prompt consumers into questioning the ethics of consuming foods of animal origin

The United Nations Environment Program (UNEP), discusses how human action may have facilitated the emergence of zoonotic diseases like COVID-19.

Deforestation, climate change, antimicrobial resistance and intensified agriculture and livestock production are factors linked to the emergence of zoonotic* disease.

Consumer concern about the link between foods of animal origin and these factors, coupled with concerns about the 'safety' of livestock production systems, could encourage consumers to review their protein choices, in favor of plants.

What factors are increasing zoonosis emergence? (Diseases transmitted from animals to humans)



#COVID19

UN environment programme

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Build familiarity into plant-based

During the initial weeks of the pandemic, consumers' desire to stick to the familiar with food and drink may have deterred them from buying into the plant-based foods sector. However, the threat of meat shortages caused by meat-processing plant closures may push new consumers into the plant-based meat sector.

To capture the attention of these 'new' consumers, brands must build an element of familiarity into plant-based foods, as during COVID-19 consumers will seek a degree of comfort and familiarity from food and drink.

Building familiarity into plant-based foods will be key during the uncertain times created by COVID-19

The initial weeks of the COVID-19 pandemic drove changes to consumer shopping habits, such as stockpiling long-life staples, the return of the 'weekly shop' and rediscovering scratch-cooking.

Additionally, consumers' desire for familiarity and comfort may have dampened their appetite for experimenting, thereby deterring them from venturing into plant-based foods – an area of the supermarket that is still uncharted for many.



Not even in a crisis will folks buy the plant based hot dogs
[#californiashutdown](#) [#CaliforniaQuarantine](#)



12:17 AM · Mar 21, 2020

1K See the latest COVID-19 information on Twitter

The Independent's article pictures plant-based meats left on the shelf

Prior to COVID-19, 'plant-based' was a thriving trend in regions like Europe; however, during the initial weeks of the pandemic, plant-based foods were often pitched by the media as one of COVID-19's victims.

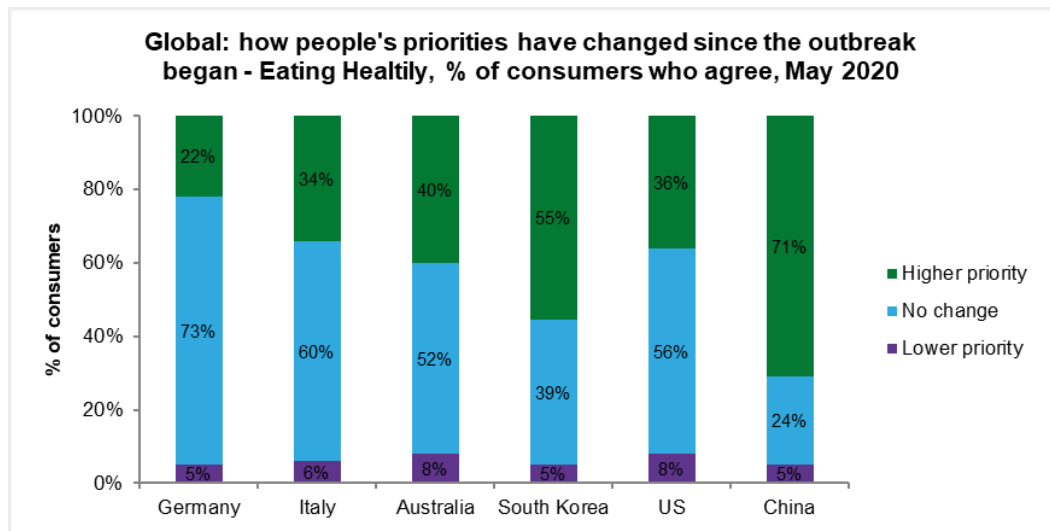
For example, The grocery items that people don't want to eat amid COVID-19 pandemic' article, published by the UK's Independent on 24 March 2020, included consumers' Twitter posts picturing plant-based foods left on the shelf in US stores.

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Ensure plant-based foods deliver on 'health'

Interest in 'preventative health' could steer consumers towards healthy eating patterns like plant-based dieting



Base: 1,000 internet users age 16+, in Germany and Italy, 6-13 May 2020; 500 internet users aged 18-45+ in Australia, 20 May 2020 and South Korea, 26-28 May 2020; 2,000 US internet users aged 18+, May 28-June 4; 1,200 Chinese internet users aged 18-59, May 27-June 3

Source: Lightspeed/Mintel (Germany, Italy, US); Dynata/Mintel (Australia, South Korea); Ku/Run/Data (China); Mintel's Global COVID-19 Tracker

Research indicates that the impact of COVID-19 is more severe in people with dietary-related disease like diabetes and obesity, which has encouraged consumers to embrace eating patterns that support health for the longer term.

Plant-based dieting underpins dietary guidelines such as the UK's Eatwell Guide and is regarded a healthy diet for the longer term.

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Consumer interest in 'real' and 'whole' foods may threaten plant proteins with a more processed image

In the US, Lundberg Family Farms and Green Giant each highlight the high protein content in its plant-based frozen meals, which are made without meat substitutes.

These plant-based meals could attract consumers who wish to refocus their diet around plants, but are not attracted to plant-based meat and dairy alternatives.



Lundberg Grainspirations Beans & Greens Rice & Quinoa Bowl (US)



Green Giant Harvest Protein Bowls California Style (US)

The opportunity

COVID-19 is likely to create a window of opportunity for plant-based foods of many types. Plant-based foods may provide answers to consumers' concerns that COVID-19 has drawn new attention to, including health, the environment and food safety.

However, some plant-based foods fail to meet consumers' expectations on areas such as taste, nutrition, transparency and naturalness. To secure the loyalty of any potential new customers that COVID-19 may have tempted into the plant-based space, producers must address the attributes they fail to impress consumers with.

