



INSIGHT  
EDITION

#3

**CHINA:**

**FUTURE PROTEIN**



The science of **premium™**



**THE GLOBAL DIET IS CHANGING,  
WITH AN INCREASED FOCUS ON  
PLANT-BASED PROTEIN SOURCES.**

**Much of the current understanding around the growing adoption of plant-based sources of protein is based on Western markets. Plant & Food Research, the Ministry for Primary Industries Economic Intelligence Unit and Mintel Consulting have partnered to conduct exploratory research in China to understand whether this trend is likely to gain momentum in this key market for New Zealand's exports.**

An online survey was carried out in Tier 1 and 2 cities across China, in August 2017. Responses were collected from 2000 people, broadly representing the demographic strata of the country.

**Key findings from the survey include:**

- Increasing affluence means Chinese consumers are trading up to healthier, higher integrity options.
- The main reasons for reducing meat intake is weight management and better health.
- More than 60% of Chinese consumers intend to eat more fruit and vegetables.
- Pork consumption is in decline; dairy, fish & seafood and beef are on the rise.
- A sudden shift towards solely plant-based diets is not expected owing to an entrenched eating culture of balance (huncai and sucai).
- 15% of consumers in China intend to follow a vegan or vegetarian diet.
- 42% of respondents seek foods that are better for the environment – meat production is viewed as worse for the environment than dairy production.
- Fear of fraudulent products is very high – credentials and assurances that signal authenticity and food safety are strong purchase motivators.

# THE CHANGING ATTITUDES TO PROTEIN ON CHINA'S PLATE

**1 INSIGHT**  
**Chinese consumers are changing the sources of protein in their diet**

Chinese consumers recognise a diverse range of benefits from protein in their diet – many relate to energy, growth and weight management. However attitudes to meat are shifting, with 39% of consumers surveyed eating less meat overall (though the biggest reduction is in pork). In compensation for this, around 60% of consumers have increased their consumption of fruit and vegetables, approx. 30% are eating more dairy and fish/seafood, and to a lesser degree some have increased their intake of a number of plant-based products.

**42%** of consumers want food options that are **better for the environment**

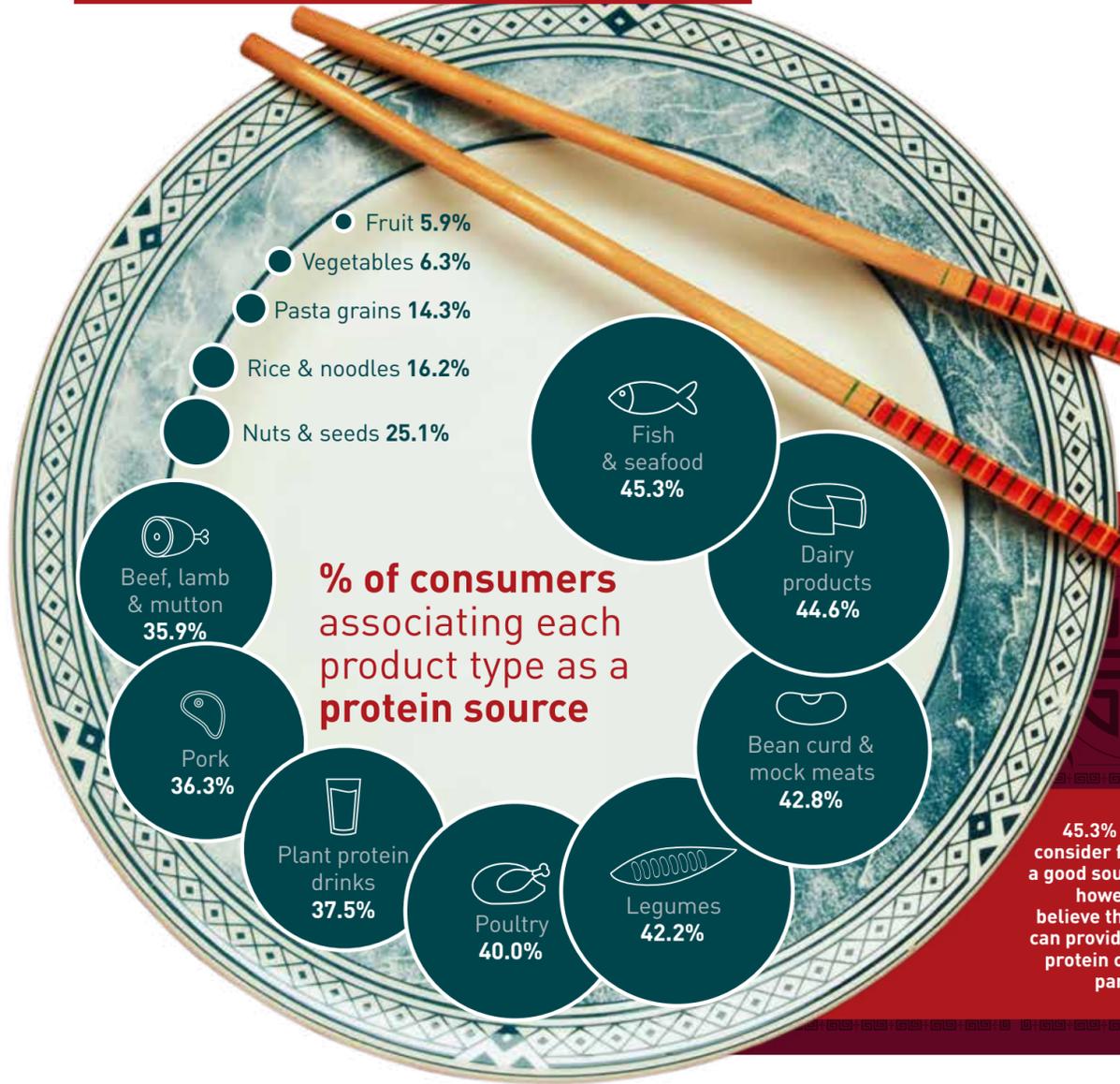


**2 INSIGHT**  
**Not all protein sources are created equal**

Protein is only part of the story. Foods perceived as high in protein were also widely valued for other positive traits related to digestion, immunity, nutritional balance and physical beauty. All foods were acknowledged to have some downsides, with meat recording the strongest negative perceptions based on associations with cholesterol, calories and saturated fat. On balance, legumes, bean curd/soy/mock meats and plant protein drinks register very strongly for positive health attributes. However, they are challenged by strong scores for dairy and fish – signaling that a sudden consumer shift to solely plant-based protein due to health concerns cannot be assumed. This view is backed by very low consumer association of fruit and vegetables with protein delivery.



**Fish and dairy are seen as the highest sources of protein,** followed closely by bean curd, mock meats and legumes



**3 INSIGHT**  
**Less animal protein, not no animal protein**

In 2016, the Chinese government revised dietary guidelines to encourage a reduction in meat consumption to help people maintain health and avoid disease. Over a third of consumers surveyed indicated an intent to reduce their meat consumption but only 15% intend to avoid meat completely. Fish and seafood on the other hand are deemed lighter and more nutritious compared to the other meat types, with 26% of respondents saying that they are eating more fish and seafood than they were a year ago. Our survey suggests 33% of consumers are also consuming more dairy products than a year ago. This illustrates a strong recognition that plant (sucai) and animal (huncai) based dishes are the basic elements of each meal they do not substitute for each other or conflict but are complementary. Reduction of meat does not translate to reduction in all animal-based protein.

**26%** of consumers are eating **more fish and seafood** than they were a year ago

**Chinese food culture is a strongly established tradition. sucai (vegetable) and huncai (meat) based dishes are considered the basic elements of any meal. Chinese consumers view all food types as having a unique profile of both positive and negative qualities, hence a need for a daily balance.**

Animal-based products are perceived as key sources of protein, with fish/seafood and dairy ranking highest in this perception with our survey respondents. Fruits and vegetables, whilst valued as a rich source of vitamins and minerals, are not seen to provide protein or the energy and satiety associated with protein-rich foods.

As a nation Chinese people are quite at home with products typically classed as 'meat alternatives' in western cultures – products such as bean curd (tofu), mock meats and legumes. These are perceived as sources of protein similar to that of animal-based products.

**45.3% of consumers consider fish & seafood a good source of protein however only 6.3% believe that vegetables can provide protein. But protein content is only part of the story.**



**39%** of consumers are eating **less meat overall**

**4 INSIGHT**  
**Chinese consumers are open to experimentation however insects may be a step too far**

When presented with a range of novel food concepts which offered to replace meat with plant-based ingredients; or which combined plant-based ingredients and meat in a fusion product, Chinese consumers showed a huge appetite to try something new. Of a dozen concepts presented by our survey – ranging from mock meats made from pea protein to dried sausage with added vegetables – more than 50% of consumers were interested in trying each of them. On the other hand, concepts including insect protein, often quoted as a major source of nutrition by food futurists, generated a comparatively low level of interest.



More than **50%** surveyed are interested in trying novel **plant-based protein products**

**5 INSIGHT**  
**Priorities are shifting and consumers are trading up**

The most common reasons given for reducing animal protein consumption were weight management and health. Health credentials are key in this market and increasing affluence is allowing consumers to choose products that are healthier, as well as being of higher quality and environmental integrity than ever before. The Chinese are the biggest consumers of pork in the world but this is decreasing as they seek healthier options, such as fish, dairy and beef. Environmental concerns influence purchase decisions for nearly half of those surveyed. Fears around food safety are very high in China, brands and trust marks that signal product authenticity are strong purchase motivators.

This brochure is a snapshot of our work examining Chinese perceptions of, and attitude towards, the sources of protein in their diet. We're adding to our knowledge on the Chinese consumer all the time, with an ongoing research effort by the Plant & Food Research Consumer & Product Insights Group and the best partners in market and consumer research.

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Also in this Insight Edition series:

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