gfi / Brazil

EXECUTIVE SUMMARY

The Brazilian consumer and the plant-based market

2023 / 2024

Credits

AUTHORS
Camila Lupetti
Raquel Casselli

RESEARCH DEVELOPMENT
Instituto Brasileiro de Pesquisa e Análise de Dados (Ibpad) e Netquest

STANDARDIZATION AND CATALOGUING
Tikinet

REVISION
Brunni Corsato
Vinícius Gallon

TEXT PRODUCTION
Camilla Lupetti
Gustavo Guadagnini
Raquel Casselli

PUBLICATION DESIGN
Fabio Cardoso

SPONSORING COMPANIES
AAK
Incrível
Mr. Veggy
NotCo
N.OVO
Plant Plus Foods

26%

of Brazilian ABC class consumers eat plant-based meats at least once a month

A survey conducted by The Good Food Institute Brazil with over 2,000 Brazilian ABC class consumers from all regions of the country revealed that 21% are seeking to reduce their consumption of animal products in their habitual diet, the so-called flexitarians.

New research by GFI Brasil presents a comprehensive overview of the Brazilian consumer and the consumption of plant-based products in Brazil. The study, which combines various methodologies, aims to understand consumer trends and behaviors about food, focusing on the specificities of the role of animal meat in the diet and how plant-based meats are perceived in the context of everyday food.

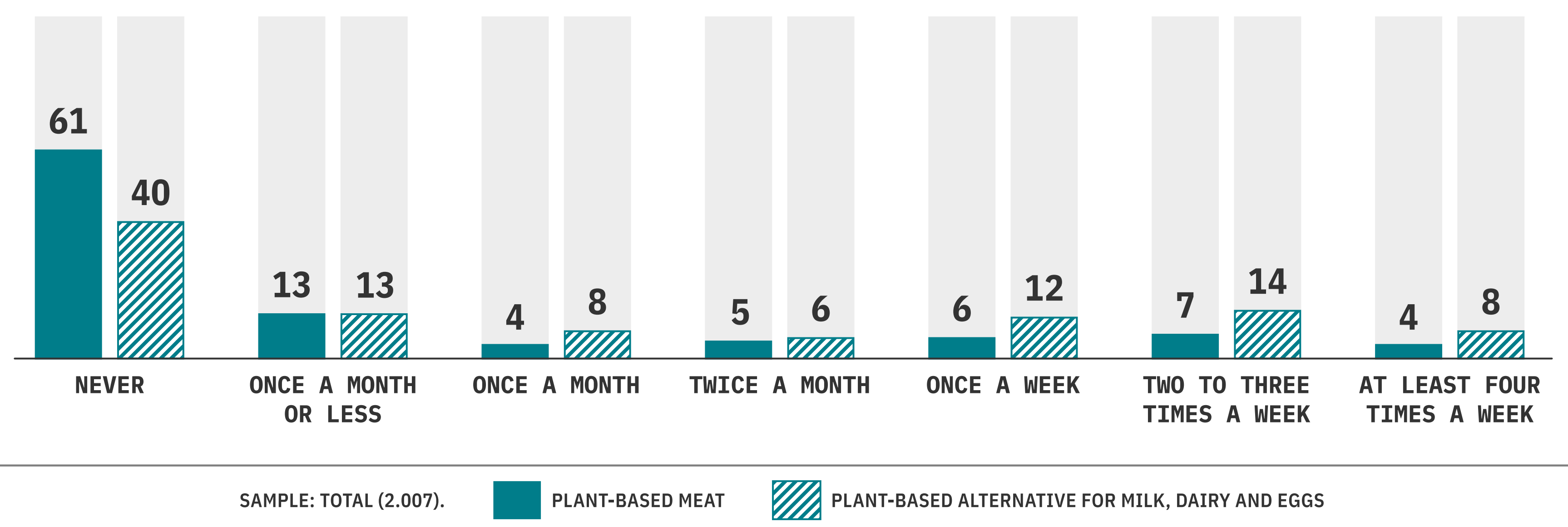
Methodology

The research used social listening, focus groups and online questionnaires to collect data on the behavior and preferences of Brazilian consumers. The first one brought discoveries about how the subject of plant proteins is treated in the environment of interactions of some social media; the second allowed to deepen subjective questions related to food and the role of meat in different individual, family and social spheres. The third and last stage brings representative data from the Brazilian population of classes ABC, with internet access, regarding animal and plant meat consumption, focusing on plant-based meat analogs to traditional meat.

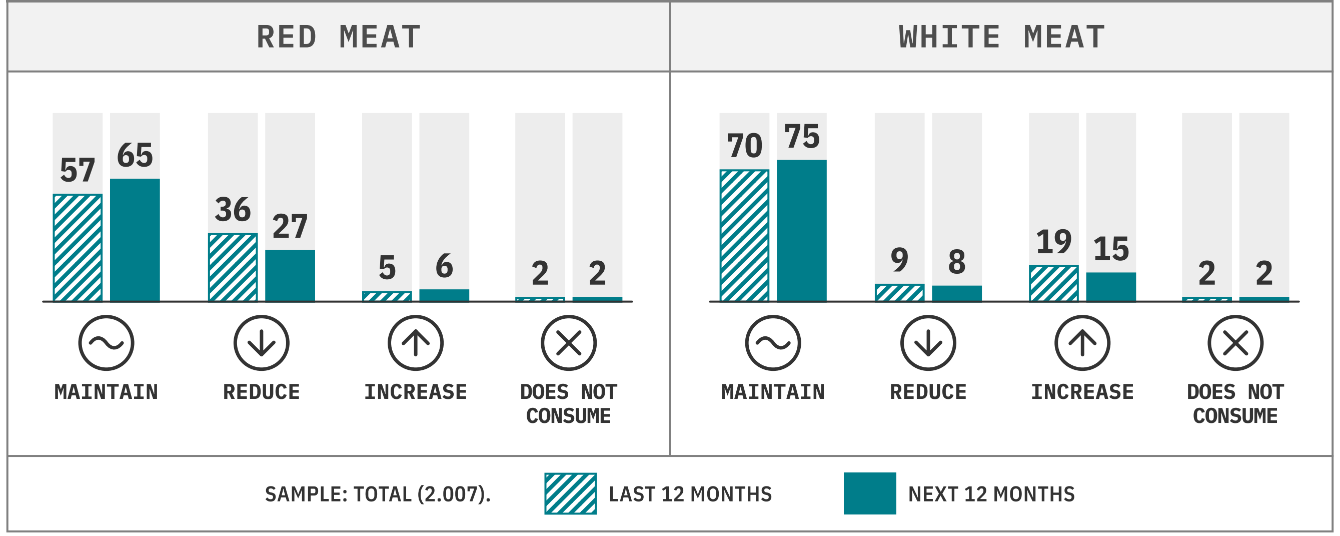
Key Findings

Consumption Trends: 21% of respondents define their diet as seeking to reduce the consumption of animal products, the so-called flexitarians. In total, 34% declare some restriction on animal products (flexitarians, pescetarians, vegetarians or vegans). In the last 12 months, 27% of respondents said they had reduced their consumption of red meat. Among those already reduced, 45% intend to reduce further next year. Improving overall health and the high price of animal meat are the most cited reasons for this recent reduction (38% and 35%, respectively). For those who define themselves as flexitarians, health is more critical in this reduction process than for omnivores (48% vs. 34%).

CONSUMPTION OF PLANT-BASED PROTEIN (%)



CHANGES IN MEAT CONSUMPTION (%)



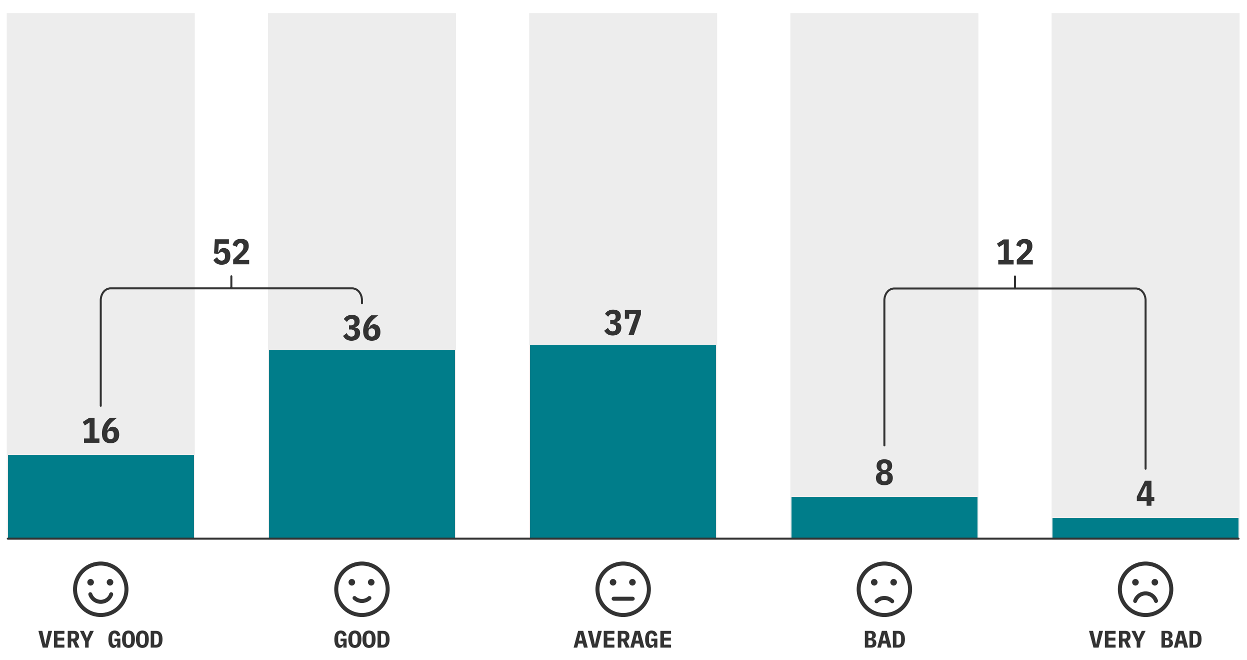
REASONS TO REDUCE MEAT CONSUMPTION (%)

REASON	TOTAL IM: 2,1		OMNIVOROUS IM: 2,0		FLEXITARIAN IM: 2,3	
General health improvement	38	1	34	2	48	1
Meat price	35	1	40	1	28	3
Improves digestion	30	2	27	3	35	2
Reduce cholesterol	25	3	24	3	27	3
Lose weight	22	3	24	3	21	
Animal welfare concerns	18		12		26	3
Environmental concerns	13		10		18	
Family issues	4		4		4	
Allergies	4		3		4	
Religious	4		2		5	

IM MULTIPLICITY INDEX 1 FIRST 2 SECOND 3 THIRD

Plant-based meat analogs: Most participants (64%) have some familiarity with plant-based meat analogs, and 18% have already tried them. It is interesting to note that 36% of the total respondents were unfamiliar with plant-based meat analogs at the time of the survey, particularly those in Class C. For 52% of respondents, the concept of plant-based meat analogs is a good or very good idea, and their positive evaluations were justified mainly by the innovative, interesting and distinct character of the category, with 30% of the responses from those with a positive view. The idea is good, but what do I gain from it? Plant-based meat analogs offer a solution for replacing animal meat on the plate. Still, even regular consumers of plant-based meats have difficulty highlighting, during group discussions, the real benefits of consuming these products compared to other alternatives considered "natural".

OVERALL EVALUATION OF THE CONCEPT OF PLANT-BASED MEAT ANALOGS TO ANIMAL MEAT (%)



SAMPLE: TOTAL (2.007).

Conclusions and Recommendations

The alternative protein sector in Brazil presents significant opportunities due to the innovation of plant-based meat analogs, especially with a health-conscious audience. However, challenges such as the perception of high prices, the difficulty of finding products, and the need to offer attributes and experiences comparable to animal meat still need to be overcome. To guarantee the growth and consolidation of the market, it is essential to invest in developing products that are competitive in taste, improve the clear communication of benefits, make products more accessible and visible, and integrate these alternatives practically and familiarly into consumers' daily lives.

Team

GFI Brazil

Alexandre Cabral
EXECUTIVE VICE PRESIDENT

Alysson Soares
POLICY SPECIALIST

Ana Carolina Rossettini
DEVELOPMENT AND STRATEGY MANAGER

Amanda Leitolis, Ph.D.
SCIENCE AND TECHNOLOGY SPECIALIST

Ana Paula Rossettini
HUMAN RESOURCES ANALYST

Bruno Filgueira
CORPORATE ENGAGEMENT ANALYST

Camila Nascimento
OPERATIONS AND FINANCE ANALYST

Camila Lupetti
MARKET INTELLIGENCE SPECIALIST OF CORPORATE ENGAGEMENT

Cristiana Ambiel, MS.
DIRECTOR OF SCIENCE AND TECHNOLOGY

Fabio Cardoso
COMMUNICATION ANALYST

Gabriela Garcia, MS.
PUBLIC POLICY ANALYST

Gabriel Mesquita
CORPORATE ENGAGEMENT ESG ANALYST

Graziele Karatay, Ph.D.
SCIENCE AND TECHNOLOGY SPECIALIST

Guilherme de Oliveira
INNOVATION SPECIALIST OF CORPORATE ENGAGEMENT

Gustavo Guadagnini
PRESIDENT

Isabela Pereira
SCIENCE AND TECHNOLOGY ANALYST

Julia Cadete
OPERATIONS ANALYST

Karine Seibel
OPERATIONS MANAGER

Lorena Pinho, Ph.D.
SCIENCE AND TECHNOLOGY ANALYST

Luciana Fontinelle, Ph.D.
SCIENCE AND TECHNOLOGY SPECIALIST

Lívia Brito, MS.
COMMUNICATION ANALYST

Manuel Netto
POLICY ANALYST

Mariana Bernal, MS.
POLICY ANALYST

Mariana Demarco, Ph.D.
SCIENCE AND TECHNOLOGY ANALYST

Patrícia Santos
EXECUTIVE ASSISTANT

Raquel Casselli
DIRECTOR OF CORPORATE ENGAGEMENT

Vinícius Gallon
COMMUNICATIONS MANAGER

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