About GFI India

The Good Food Institute is a global non-profit focused on accelerating the sector of plant-based and cultivated meat, eggs, and dairy, in order to enable the transition to a more sustainable, healthy and just food system. Our teams, spread across offices in India, the United States, Asia Pacific, Brazil, Europe, and Israel, work together with scientists, large corporations, entrepreneurs, and governments to address the pressing question - how do we feed 9.7 billion people by 2050 (over 50% of whom will be in Asia) through systems which do not negatively impact the environment, scarce natural resources, and public health?

The opportunity for the Good Food Institute-India (GFI India) lies in spearheading a Mission for Smart Protein - creating access to sustainable sources of affordable protein, tapping into the potential of this sector to enhance nutritional outcomes, and creating new sources of value and employment in farming and manufacturing.

GFI's Approach and introduction to alternative meat options

Instead of asking consumers to give up what they love, GFI promotes the development of alternatives to meat, eggs, and dairy that are competitive on taste, price, and accessibility. So consumers can have more of what they like, just made in a better way.

Protein alternatives fit into four categories. These include Plant based proteins, recombinant proteins, non-animal cell culture, animal cell culture._For this exercise, we just need to focus on plant-based meat.

Plant based meat is made using plants and other non-animal products to look, taste, and feel like meat products. Plant-based meats are made to resemble meat products in texture, flavour, and appearance. The primary ingredients in plant-based meat substitutes are typically soybeans (and other legumes), wheat gluten, lentils, and tofu and a variety of nuts

India - Home to approximately 1.3 billion people, 80% of who follow Hinduism, India is often misperceived to be majority vegetarian; in fact, upwards of 70% of Indians consume meat at least occasionally (International Institute for Population Sciences (IIPS, 2017).

India is observing one of the highest rates of growth in chicken, mutton (goat/sheep meat), and fish consumption in the world (OECD, 2018; Robinson & Pozzi, 2011)

Meat trends

Consumers in India tend to choose fresh meat over processed, mainly due to the cheaper price in butcher shops.

Frozen buffalo meat accounts for the greatest share of processed products on the market however, poultry has started to gain popularity. Processed goat and lamb are relatively small segments, with consumers clearly preferring these meats fresh.

Some consumers choose frozen preparations, as they tend to be more suitable for preparing many traditional dishes. Several Indian companies introduced other products, such as chicken sausage, chicken salami, dried beef, whole chicken or drum sticks.

In a recent systematic review of studies projecting future dietary trends in India, we find a projected increase in meat consumption in India.Researchers confirm that future increases in meat consumption in India will be directly proportional to increases in income.

Adoption of plant-based meat in India / Consumers willingness to buy

In India, we find omnivores and those who eat more meat are again more likely to eat plant-based meat. Higher-income groups in India expressed more interest in plant-based meat, as did more educated and more politically liberal consumers.

Vegetarianism, environmental consciousness, income, and political stances are significant indicators of willingness to buy in India.

Familiarity with the products was strongly predictive of purchase intent, and food neophobia predicted lower purchase intent. In terms of attitudes, perceived sustainability, excitement, necessity, and goodness were predictors of plant-based meat purchase intent in India.

The findings in India and China indicate that those who eat more meat and are more attached to meat, are more likely to purchase plant-based and cultivated meat. In terms of reducing the impact of conventional meat on the environment and animal suffering, aiming at markets in China and India may have particularly high potential.

Whilst there are a multitude of unexplored factors which could affect consumer acceptance of cultivated and plant-based meat, this study has demonstrated the importance of China and India as potential future markets. All three markets are substantial, with consumers in China and India showing even more initial interest than the US.

Political orientation was also a consistent predictor of purchase likelihood across countries.
We did not ask about political orientation in China, but in the USA and India, we consistently found that more liberal people reported a higher likelihood of purchasing plant-based and clean meat.

In India, perceived necessity was again a predictor of both plant-based and clean meat acceptance, whilst perceived sustainability predicted plant-based meat acceptance and perceived ethicality predicted clean meat acceptance.

This seems to suggest that consumers in India, who had the lowest levels of meat attachment, are most cognizant of the environmental and ethical issues with conventional meat. Messages about the environment and animal welfare may be more effective marketing strategies in India compared to China and the USA.

The key factors affecting the food and beverage market in India are:

A culture of fresh food consumption. India has a long tradition of consuming primarily fresh food. In recent years, the consumption of fresh food has been further boosted by increased health awareness of consumers.

High and growing health consciousness. The long-standing preference for the consumption of fresh food demonstrates that consumers have traditionally been conscious of the impact of food on health to some extent.

Young urban demographic. The population of India is young with about half of the population under 25.

Demand for organic and "free-from" foods. It is increasing off the back of increases in health consciousness and is facilitated by the culture of fresh food consumption. Urban consumers and the younger (25-40) age group, in particular, are driving this demand. While overall consumption levels of organic currently remain low, they are rapidly growing with many consumers shifting to only organic products.

Smaller pack sizes. There is a traditional preference for fresh food. That said, processed foods have shown high growth rates of late.

Value focus. In broad terms, India is a value-sensitive market. The impacts of this are: (1) the The cheapest product in absolute terms is not necessarily the most attractive – therefore marketing based on price alone is generally not effective; (2) demonstrating value is important for producers

Trends in India for Protein Consumption

Thirty-one per cent of Indians are vegetarian, according to the 2006 The Hindu-CNN-IBN State of the Nation Survey.

Thus, a large part of the protein requirement could be met by pulses. Cereals and pulses are the major sources of protein from plant sources in the Indian diet. Pulses are nutrient-dense crops and increased consumption of pulses in the diet is also associated with better nutrition.

A report states that 85% of households in India which are protein-undernourished have diets deficient in calories. It would thus appear that by far the major part of protein undernutrition is the result of inadequate diet and the consequential undernutrition in relation to calories.

As per the consumer survey, close to 9 out of 10 people are taking an inadequate amount of protein using the calculator. This shows that the overall level of protein consumption is extremely low in India.

Higher Vegetarians (91%) show a protein deficit as compared to nonvegetarians (85%).). Lower age groups (30-40) show better than average protein intake (gap at 82%).

Lower age groups (30-40) show better than average protein intake (gap at 82%). While Delhi had the highest respondents showing Protein gap (99%), Mumbai came out with the least number of respondents showing Protein Gaps (68%).

Currently, vegetable sources dominating the global protein supply (57%), with meat (18%), dairy (10%), fish and shellfish (6%) and other animal products (9%) are making up the remainder.

PBM companies to check as references

1. **Beyond Meat**

2. **[Impossible Foods]**
3. **[Good Dot]**

References:

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- Bryant Christopher, Szejda Keri, Parekh Nishant, Deshpande Varun, Tse Brian (2019) ‘A Survey of Consumer Perceptions of Plant-Based and Clean Meat in the USA, India, and China’, Frontiers in Sustainable Food Systems, 2019(3): 11, 10.3389/fsufs.2019.00011

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