

EXPORT MARKET PROFILES

OPPORTUNITIES FOR AUSTRALIAN & NEW
ZEALAND PLANT-BASED MEAT ALTERNATIVES

2021



EXPORT MARKET PROFILES



With demand for protein and meat alternatives increasing in Australia and New Zealand's key export markets across Asia, more plant-based meat companies in our region are seeking to grow their export footprint.

This new resource compiled by Food Frontier in 2021 offers guidance on seven priority Asian markets. Each profile includes market intelligence such as consumer profiles, demand figures, local and international brands in market, labelling requirements and distribution insights.

TABLE OF CONTENTS

China	1
India	7
Indonesia	13
Japan	18
Malaysia	23
Singapore	29
South Korea	34

DISCLAIMER

This resource provides general information only. It is important to investigate the market, competition, regulations, and available channels to determine the best route and process to distribute your products.

CONTACT

Please contact the team at info@foodfrontier.org for more information.

MARKET PROFILE:

CHINA



“China’s plant-based meat industry will reach US\$50 billion by 2030 at a growth rate of 36%.”

- YOUKUAI GROUP INTERNATIONAL

MARKET SIZE

China’s plant-based meat (PBM) market was estimated to be worth US\$1B in 2019. With a growth rate between 13.5% and 15.5% since 2013 it is projected to grow to US\$50B by 2030.¹ Currently, 39.8% of China’s plant-based protein, including PBM, is imported.² In the wider Asia-Pacific region, the ‘meat substitute’ market was worth US\$15.3B in 2019, up 4.75% from 2018. The pandemic has accelerated that growth, with the market forecast to expand 11.6% to US\$17.1B in 2020.³

Part of China’s interest in PBM can be linked to food security, with ongoing pressure of the 2019 African Swine Fever outbreak on domestic pork supplies.⁴

CONSUMER DEMAND

With a history of food insecurity, meat consumption is seen by older generations as a sign of wealth and prestige.⁵ However, as the Chinese middle class continues to grow, young urban consumers who grew up with frequent access to meat do not hold the same view. This group are a key market for PBM, viewing it as novel and trendy.⁶

Food service plays an important role in PBM growth as it allows consumers to try new products during early stages of consumer penetration and caters to younger consumers who typically prefer to dine out.⁷ Chinese consumers are typically price-sensitive but brand-conscious, with a willingness to pay for premium products which signal higher social status.⁸

Pork is traditionally the most widely consumed meat in China,⁹ with many PBM companies focusing on

developing alternatives for both pork and beef due to their relatively higher market prices.¹⁰

According to a report by Good Food Institute Consultancy (GFIC) in China, the main challenge to mass adoption of PBM is the development of products that can directly substitute conventional meat in Chinese cuisine.¹¹ Some notable examples are meat alternatives in hot pot, meat-based snacks and skewered meats.

In 2016, the Chinese government released dietary guidelines which aim to reduce meat consumption by 50% to improve public health.¹² PBM products are also encouraged to contain high-protein, low-fat and low-sodium content, following the first voluntary guidelines¹³ regarding PBM released in April 2021 by the state-affiliated industry group, Chinese Institute of Food Science and Technology.¹⁴







Food safety is a key concern for Chinese consumers due to multiple food scandal in recent years.¹⁵ Both Australia and New Zealand are well-positioned to capitalise on their ‘clean and green’ reputations. However, there is a trend for Chinese consumers to support local brands as goods ‘made in China’ are no longer considered inferior, which will present competition for Australian and New Zealand exporters.¹⁶ While this is more evident in other sectors such as electronics, domestic food producers are rapidly catching up to imported foods. This is linked to the passing of Food Safety Law (2015), described as China’s strictest food safety law in history to restore consumer confidence in domestic products.¹⁷

PLANT-BASED MEAT BRANDS IN MARKET

Examples of major local plant-based meat brands

	Zhenmeat	PBM start-up	Offers alternatives to meatballs, crayfish, pork tenderloin, dumplings made from fungus and pea protein. Trialled pork style mooncakes on Alibaba. ¹⁸ Available in food service. ¹⁹
	Starfield	PBM start-up	Offers PBM made from soy protein and wheat, available in food service (such as plant-based chicken burger at Dicos). ²⁰
	Hey Maet	PBM start-up	Offers alternatives to meatballs, burgers, nuggets, chops, sausages, crispy pork and dumplings made from pea, soy and rice proteins. Available in food service. ²¹
	Whole Perfect Food	Brand by Shenzhen Qishan Food Co. Ltd	Soy food manufacturer originally catering to vegetarian and Buddhist consumers. PBM range focuses on Chinese cuisine, sausages and seafood. Available in grocery and e-commerce. ²²
	SuLian Food	PBM pioneer in China since 2010	Offers 200+ PBM products focused on Chinese cuisine alternatives such as pork-belly, meat-floss and dumplings. Available in food service, e-commerce and exports globally. ²³
	Jinzi Ham	PBM brand by meat producer	Partnered with Danisco (China) Investment, a unit of DuPont, to create soy-based beef-style patties. ²⁴ Available in e-commerce.
	PlantEver	Brand by agribusiness company Cargill	Locally produced by Cargill for the Chinese market. Offers nuggets and beef-style patties. Available in food service (KFC) since April 2020 ²⁵ and e-commerce in mid-2020.
	Zrou	Brand by start-up YouKuai Group	Offers minced and ground pork-style based on soy and konjac. Available in food service. ²⁶

International brands in market

	Beyond Meat (USA)	Beyond Beef has been available in food service (Starbucks, KFC, Pizza Hut) since April 2020 ²⁷ and in grocery since July 2020. ²⁸ Beyond Pork was created specifically for the Chinese market, available in food service since November 2020. ²⁹ Local production facility opened in April 2021. ³⁰
	OmniPork (Hong Kong)	OmniPork products are available in grocery stores, e-commerce and food service (such as McDonalds, Taco Bell and JiXiang Wonton).
	The Vegetarian Butcher (Netherlands)	PBM brand acquired by Unilever. Available in food service (such as plant-based Whopper at Burger King). ³¹
	V Meat (Australia)	Brand established by Australian-based JAT Oppenheimer Pty Ltd., with a production facility in China for Asian markets. ³² Partnered with Shanghai Godley Vegetarian (restaurant chain) to supply plant-based pork, beef and chicken since 2020.
	v2food (Australia)	Recently launched in China with a number of pork style products designed for the Chinese market. ³³
	Harvest Gourmet (Switzerland)	Brand by Nestlé, launched in China in December 2020 with a local production facility in Tianjin. ³⁴ Offers plant-based Western and Chinese-style products including burgers, sausages, kung pao chicken, braised meatballs and pork belly. Available in grocery stores (Hema supermarket).

DISTRIBUTION CHANNELS

China has long and complex distribution channels with several intermediaries handling exports, including import agents, distributors and wholesalers. Licensed importers traditionally provide import services on behalf of third parties, including distributors and traders who often do not have import licenses. However, this is changing with some large supermarket chains gaining licenses to import directly from overseas.³⁵ Pre-market approval is necessary for all imports to comply with Chinese standards and can be complex and time-consuming.

It is possible to export directly through cross-border e-commerce (CBEC), which is simpler than general trade with less pre-market and border clearance requirements, and can connect exporters directly to consumers. However, this is a pilot program and is likely to undergo further regulatory change.³⁶

The retail sector in China is fragmented, with hundreds of supermarket brands; no company controls more than 5% of market share.³⁷ Most national hypermarket chains have a large range of imported foods including plant-based meat, as do international supermarket companies. Examples include Vanguard, RT Mart, Auchan, Walmart, Carrefour, Century Mart and Yonghui. Premium supermarkets also stock imported food and specialty products and are considered a good avenue to test the market before undertaking further retail channel expansion³⁸ with examples including Olé, Sam's Club and BHG.

E-commerce platforms are extremely popular, facilitated by widespread use of mobile payments and inexpensive local delivery.³⁹ Major e-commerce marketplaces providing packaged foods include JD.com, Tmall, Suning, VIP.com, Kaola and Yiguo.

The rise of 'new retail', where the traditional retail sector and e-commerce are increasingly converging to better serve Chinese consumers,⁴⁰ is an ongoing trend, making both online and offline channels important.

LABELLING LAWS

Food imports are regulated by China's State Administration for Market Regulation (SAMR). China's latest national standards (known as Guo-biao or GB), including product labelling, are not all

freely available in English.⁴¹ Most border clearance failures are caused by breaches of import regulations, including non-compliance with labelling requirements; the exporter is held accountable in most cases, with non-official trade barriers imposed by China an added risk facing exporters.⁴² Advice should be sought from a professional importer or distributor in China.

Imported products must be accompanied with a printed or pasted label in simplified Chinese characters with the exception of trademarks, name and address of the manufacturer and foreign distributor outside China, and websites.

Latest revisions to the General Rules for the Labelling of Pre-packaged Foods (GB7718-2011)⁴³ and the National Food Safety Standards for General Rules for Nutrition Labelling of Pre-packaged Food (GB 28050-2011)⁴⁴ were drafted in 2019⁴⁵ and 2020⁴⁶ respectively. Both have yet to be issued officially and no date of entry into force has been set. The following information is based on these draft revisions:

Element	Detail
Name	Standard name of food product.
List of ingredients	Listed in descending order of weight, including constituents of compound ingredients. Food additives should be declared in their common names or specific name and International Numbering System (INS) number.
Quantitative labelling of ingredients	Content of ingredients should be declared in percentage or numerical format if labelling places special emphasis on the presence of one or more characterising ingredients.
Net content and configuration	Expressed by volume (mL or L) and weight (g or kg).
Name, address and contact	Declared for the agent, importer and/or distributor that have registered with relevant authorities in China.

information of distributor	
Country of origin	Declared for the country where the product underwent most processing.
Date marking	Date of manufacture and shelf life is formatted in sequence of year, month and day.
Intended consumer group, serving size or instructions for use	If original labels involve an intended consumer group (such as infants), serving size or instruction for use, this must have a corresponding Chinese translation and comply with requirements by relevant national food safety standards.
Conditions for storage	Any special conditions for storage of product.
Quality grade of product	Could be declared for imported pre-packaged foods, consistent with relevant product standards in China.
Declaration of allergens	Allergens include: grain, crustacea, fish, egg, peanut, soybean, milk, nuts and all their products. Include a warning message of allergens due to possibility of cross-contamination.
Nutrition labelling	Include contents of energy, protein, fat and fatty acid, carbohydrate, sugar and sodium and their percentages in Nutrient Reference Value (NRV%). Must declare content of trans-fatty acid if containing hydrogenated fat. Must include nutrients subject to a nutritional claim. Expressed per 100g. Per serving is optional (specified with size of serving).
Special contents	Declared if relevant e.g. irradiated food, genetically modified food.

The industry group Chinese Institute of Food Science and Technology released the first voluntary standard

for PBM in April 2021, which comes into effect in June 2021 and provides guidelines for the labelling, packing, transportation and storage of PBM.⁴⁷ Labelling should include wording that clearly stipulates that the product is different to and aims to replicate conventional meat; terms such as “plant-based”, “plant-made”, “plant-derived”, “plant” or “vegetable” can be used.

TARIFFS

The tariff code for protein concentrates for both Australian and New Zealand exports is 2106.10.

Australia exporters enjoy tariff-free access under China-Australia Free Trade Agreement (ChAFTA). Similarly, New Zealand exporters also have tariff-free access under the New Zealand-China Free Trade Agreement (NZ-China FTA).

USEFUL RESOURCES

Austrade (contact page)

[China Market Profile](#)
[Austrade Food and Beverage to China](#)
[Austrade contact person for plant-based trade opportunities](#)

Department of Foreign Affairs & Trade

[DFAT Free Trade Agreement Portal](#)

NZ Trade & Enterprise (contact page)

[NZTE Tariff Finder](#)
[China Market Profile \(available to registered NZTE customers\)](#)

USDA Foreign Agricultural Service

[China Exporting Resources](#)
[Voluntary Standard for Plant-Based Meat Alternative Products](#)

REFERENCES

- ¹ Furtado C. Chinese plant-based meat startup bags \$7.3m to drive its 'Tesla of food' dream. Tech in Asia. 2021 May 12. Available from: <https://www.techinasia.com/chinese-plantbased-meat-startup-aims-tesla-culinary-world-bags-73m>
- ² Furtado C. Chinese plant-based meat startup bags \$7.3m to drive its 'Tesla of food' dream. Tech in Asia. 2021 May 12. Available from: <https://www.techinasia.com/chinese-plantbased-meat-startup-aims-tesla-culinary-world-bags-73m>
- ³ Lim G.Y. Next Meats jumps on plant-based trend in Japan with yakiniku and gyudon products. Food Navigator Asia. 2020 Oct 6. Available from: <https://www.foodnavigator-asia.com/Article/2020/10/06/Local-dishes-Next-Meats-jumps-on-plant-based-trend-in-Japan-with-yakiniku-and-gyudon-products#:~:text=Japanese%20start%20Dup%20Next%20Meats,t%20the%20global%20food%20crisis>
- ⁴ Fei S. & Ni J. Local food systems and COVID-19: A look into China's responses. Food and Agriculture Organisation of the United Nations. 2020 Apr 8. Available from: <http://www.fao.org/in-action/food-for-cities-programme/news/detail/en/c/1270350/>
- ⁵ FAS China. Market Overview of Plant-Based Meat Alternative Products in China. USDA Foreign Agricultural Service. 2021 Jan 14. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Market%20Overview%20of%20Plant-Based%20Meat%20Alternative%20Products%20in%20China_Beijing_China%20-%20Peoples%20Republic%20of_01-07-2021
- ⁶ FAS China. Market Overview of Plant-Based Meat Alternative Products in China. USDA Foreign Agricultural Service. 2021 Jan 14. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Market%20Overview%20of%20Plant-Based%20Meat%20Alternative%20Products%20in%20China_Beijing_China%20-%20Peoples%20Republic%20of_01-07-2021
- ⁷ Austrade. Exporting food and beverage to China: a guide for Australian business. Austrade. N.d. Available from: <https://www.austrade.gov.au/ArticleDocuments/1358/food-and-bev-for-China-guide.pdf.aspx>
- ⁸ Zhu R. Understanding Chinese Consumers. Harvard Business Review. 2013 Nov 14. Available from: <https://hbr.org/2013/11/understanding-chinese-consumers>
- ⁹ Treanor S. & Hotson E. Persuading China to switch to 'fake' pork. BBC News. 2020 Jul 1. Available from: <https://www.bbc.com/news/business-53052856>
- ¹⁰ FAS China. Market Overview of Plant-Based Meat Alternative Products in China. USDA Foreign Agricultural Service. 2021 Jan 14. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Market%20Overview%20of%20Plant-Based%20Meat%20Alternative%20Products%20in%20China_Beijing_China%20-%20Peoples%20Republic%20of_01-07-2021
- ¹¹ Ho S. Plant-Based Success in China, New Report Says. Green Queen Media. 2021 Apr 21. Available from: <https://www.greenqueen.com.hk/adapting-to-local-cuisine-key-for-plant-based-success-in-china-new-report-says-3>
- ¹² Milman O. & Leavenworth S. China's plan to cut meat consumption by 50% cheered by climate campaigners. The Guardian. 2016 Jun 21. Available from: <https://www.theguardian.com/world/2016/jun/20/chinas-meat-consumption-climate-change>
- ¹³ Chinese Institute of Food Science and Technology, Voluntary Standards - Plant-Based Meat Products T/CIFST 001-2020 – (in Mandarin) Available from: <http://www.cifst.org.cn/uploads/file/20201225/1608879643796557.pdf>
- ¹⁴ FAS Beijing. Industry Group Issues Voluntary Standard for Plant-Based Meat Alternative Products. USDA Foreign Agricultural Service. 2021 Mar 23. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Industry%20Group%20Issues%20Voluntary%20Standard%20for%20Plant-Based%20Meat%20Alternative%20Products_Beijing_China%20-%20People%27s%20Republic%20of_01-09-2021
- ¹⁵ Austrade. Exporting food and beverage to China: a guide for Australian business. Austrade. N.d. Available from: <https://www.austrade.gov.au/ArticleDocuments/1358/food-and-bev-for-China-guide.pdf.aspx>
- ¹⁶ Austrade. Exporting food and beverage to China: a guide for Australian business. Austrade. N.d. Available from: <https://www.austrade.gov.au/ArticleDocuments/1358/food-and-bev-for-China-guide.pdf.aspx>
- ¹⁷ Austrade. Exporting food and beverage to China: a guide for Australian business. Austrade. N.d. Available from: <https://www.austrade.gov.au/ArticleDocuments/1358/food-and-bev-for-China-guide.pdf.aspx>
- ¹⁸ Fitch Solutions. Alternative Protein: China's Plant-Based Meat Outlook Accelerated By Covid-19. Fitch Solutions. 2020 Nov 18. Available from: <https://www.fitchsolutions.com/consumer-retail/alternative-protein-chinas-plant-based-meat-outlook-accelerated-covid-19-18-11-2020>
- ¹⁹ Pollard M. Chinese firms bet on plant-based meat as coronavirus fuels healthy eating trend. Reuters. 2020 Sep 15. Available from: <https://www.reuters.com/article/us-health-coronavirus-china-plant-based-idINKBN2660EA>
- ²⁰ Lim G.Y. 'Retail key to success': China plant-based pioneer Starfield to launch first B2C product on e-commerce. Food Navigator Asia. 2021 Feb 18. Available from: <https://www.foodnavigator-asia.com/Article/2021/03/08/High-and-dry-China-plant-based-firm-Hey-Maet-turns-to-high-moisture-extrusion-tech>
- ²¹ Lim G.Y. 'Retail key to success': China plant-based pioneer Starfield to launch first B2C product on e-commerce. Food Navigator Asia. 2021 Feb 18. Available from: <https://www.foodnavigator-asia.com/Article/2021/03/08/High-and-dry-China-plant-based-firm-Hey-Maet-turns-to-high-moisture-extrusion-tech>
- ²² Reuters Staff. Factbox: Who is doing what in China's plant-based meat business. Reuters. 2019 Nov 19. Available from: <https://www.reuters.com/article/us-china-agriculture-plantbased-factbox-idUSKBN1XS2MP>
- ²³ SuLian Food. Available from: <https://www.sulianfood.com/en/about-sulian/>
- ²⁴ Reuters Staff. Factbox: Who is doing what in China's plant-based meat business. Reuters. 2019 Nov 19. Available from: <https://www.reuters.com/article/us-china-agriculture-plantbased-factbox-idUSKBN1XS2MP>
- ²⁵ Miao M. Cargill Launches New Plant-Based Protein Brand PlantEver™ for Consumers in China. Cargill. 2020 Jun 30. Available from: <https://www.cargill.com/2020/cargill-launches-new-plant-based-protein-brand-plantever>
- ²⁶ Furtado C. Chinese plant-based meat startup bags \$7.3m to drive its 'Tesla of food' dream. Tech in Asia. 2021 May 12. Available from: <https://www.techinasia.com/chinese-plantbased-meat-startup-aims-tesla-culinary-world-bags-73m>
- ²⁷ Beyond Meat. Available from: <https://www.beyondmeat.com/whats-new/beyond-meat-launches-in-china/>

²⁸ Ellis J. Beyond Meat opens China factory, its first outside US. AgFunderNews. 2021 Apr 7. Available from: <https://agfundernews.com/beyond-meat-opens-factory-in-china-its-first-outside-us.html>

²⁹ Zackai S. Beyond Meat ® Debuts New Product, Beyond Pork™, in China. Beyond Meat. 2020 Nov 18. Available from: <https://www.beyondmeat.com/wp-content/uploads/BYMT-Beyond-Pork-China-Release-Nov-2020.pdf>

³⁰ Ellis J. Beyond Meat opens China factory, its first outside US. AgFunderNews. 2021 Apr 7. Available from: <https://agfundernews.com/beyond-meat-opens-factory-in-china-its-first-outside-us.html>

³¹ Unilever Press Office London. The Vegetarian Butcher launches in Latin America and China in partnership with Burger King®. Unilever. 2020 Dec 23. Available from: <https://www.unilever.com/news/press-releases/2020/the-vegetarian-butcher-launches-in-latin-america-and-china-in-partnership-with-burger-king.html>

³² Yao W. JAT to produce Plant Based Meat products directly in China, benefiting from a rapidly-growing market. JAT. 2020 Dec 10. Available from: <https://company-announcements.afr.com/asx/jat/7e88e297-3a8e-11eb-a321-8af53c6c12f3.pdf>

³³ Berry, K. v2food readies for China push. 2021 Aug 11. Available from: <http://www.foodanddrinkbusiness.com.au/news/v2food-readies-for-china-push>

³⁴ He N. & Liao L. Nestlé debuts Harvest Gourmet plant-based food produced in China. Nestlé. 2020 Dec 9. Available from: <https://www.nestle.com/media/news/nestle-harvest-gourmet-plant-based-food-production-china>

³⁵ Austrade. Food and beverage to China. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/china/industries/food-and-beverage>

³⁶ Austrade. Exporting food and beverage to China: a guide for Australian business. Austrade. N.d. Available from: <https://www.austrade.gov.au/ArticleDocuments/1358/food-and-bev-for-China-guide.pdf.aspx>

³⁷ Austrade. Exporting food and beverage to China: a guide for Australian business. Austrade. N.d. Available from: <https://www.austrade.gov.au/ArticleDocuments/1358/food-and-bev-for-China-guide.pdf.aspx>

³⁸ Austrade. Exporting food and beverage to China: a guide for Australian business. Austrade. N.d. Available from: <https://www.austrade.gov.au/ArticleDocuments/1358/food-and-bev-for-China-guide.pdf.aspx>

³⁹ Austrade. Exporting food and beverage to China: a guide for Australian business. Austrade. N.d. Available from:

<https://www.austrade.gov.au/ArticleDocuments/1358/food-and-bev-for-China-guide.pdf.aspx>

⁴⁰ Austrade. Exporting food and beverage to China: a guide for Australian business. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/china/industries/food-and-beverage>

⁴² Austrade. Exporting food and beverage to China: a guide for Australian business. Austrade. N.d. Available from: <https://www.austrade.gov.au/ArticleDocuments/1358/food-and-bev-for-China-guide.pdf.aspx>

⁴³ Meador M. & Bugang W. General Rules for the Labeling of Prepackaged Foods: China. USDA Foreign Agricultural Service. 2011 May 25. Available from: https://www.ccilc.pt/wp-content/uploads/2017/07/general_rules_for_the_labeling_of_prepackaged_foods_gb7718-2011.pdf

⁴⁴ Meador M. & Jie M. General Rules for Nutrition Labeling of Prepackaged Foods: China. USDA Foreign Agricultural Service. 2013 Jan 9. Available from: https://apps.fas.usda.gov/newgainapi/api/report/downloadreportbyfilename?filename=General%20Rules%20for%20Nutrition%20Labeling%20of%20Prepackaged%20Foods%20_Beijing_China%20-%20Peoples%20Republic%20of_1-9-2013.pdf

⁴⁵ FAS Beijing. China Releases Draft General Standard for the Labelling of Prepackaged Foods for Domestic Comments. USDA Foreign Agricultural Service. 2020 Mar 20. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=China%20Releases%20Draft%20General%20Standard%20for%20the%20Labelling%20of%20Prepackaged%20Foods%20for%20Domestic%20Comments%20_Beijing_China%20-%20Peoples%20Republic%20of_03-01-2020

⁴⁶ FAS Beijing. China Notifies Draft National Food Safety Standard - General Rules for Nutritional Labeling of Prepackaged Foods. USDA Foreign Agricultural Service. 2020 Oct 9. Available from: http://agriexchange.apeda.gov.in/IR_Standards/Import_Regulation/ChinaNotifiesDraftNationalFoodSafetyStandardGeneralRulesforNutritionalLabelingofPrepackaged%20FoodsBeijingChinaPeoplesRepublicof09232020.pdf

⁴⁷ FAS Beijing. Industry Group Issues Voluntary Standard for Plant-Based Meat Alternative Products. USDA Foreign Agricultural Service. 2021 Mar 23. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Industry%20Group%20Issues%20Voluntary%20Standard%20for%20Plant-Based%20Meat%20Alternative%20Products_Beijing_China%20-%20People%27s%20Republic%20of_01-09-2021

MARKET PROFILE:

INDIA



MARKET SIZE

The 'meat substitute' market in India is expected to grow to US\$47.57M by 2026 with an average annual growth rate of 7.48% from 2021.¹ In the wider Asia-Pacific region, the 'meat substitute' market was worth US\$15.3B in 2019, up 4.75% from 2018. The pandemic has accelerated that growth, with the market forecast to expand 11.6% to US\$17.1B in 2020.²

Part of India's growing interest in plant-based meat (PBM) is contributed to COVID-19³ and the outbreak of bird flu in January 2021, which has caused consumers to become wary of conventional meat consumption.⁴

CONSUMER DEMAND

India has the world's highest number of vegetarians, accounting for 30% of the population (414 million people).⁵

Studies into urban and middle-upper income consumers in India have revealed that 62.4% were "very or extremely likely to purchase plant-based meat regularly."⁶ India's growing middle class and young population (65% are aged 35 or below) are increasingly exposed to Western cultures and have driven demand for international food products,⁷ with urban consumers more exposed to animal-free diets and more likely to consider PBM.⁸

The COVID-19 pandemic has significantly influenced the consumer behaviour of this market. While Indian consumers are traditionally cautious of processed food products and prefer to consume fresh foods, a

India's meat substitutes market is expected to reach \$47.57 million by 2026 with an average annual growth rate of 7.5 percent during 2021-2026."

- UNITED STATES DEPARTMENT OF AGRICULTURE

rise of in-home consumption due to nationwide lockdowns has increased demand, including ready-to-eat meals and frozen foods.⁹

Growing health and nutrition trends, accelerated by the pandemic, have further generated interest in PBM as an alternative to animal protein.¹⁰

Localising products, including flavour profiles to the Indian market can be helpful.¹¹

India is a price-sensitive market. Australian and New Zealand exporters will face price competition from domestic suppliers, as well as competition with US and European producers.¹²

414M




WORLD'S LARGEST
VEGETARIAN POPULATION

PLANT-BASED MEAT BRANDS IN MARKET

Examples of major local plant-based meat brands

	Veggie Champ	Brand by Ahimsa Food, a PBM manufacturer	Offers Western and Indian-style PBM based on soy and wheat such as shami kebab, tandoori salami, tandoori burger patties, fish fingers, Vienna hotdogs, duck and mutton. Available in grocery stores and e-commerce.
	Wakao Foods	PBM start-up	Offers PBM based on jackfruit, such as meat shreds, burger patties and pre-prepared PBM meals with flavours including Butter Jack (to replicate butter chicken), Teriyaki Jack and BBQ Jack. Available in grocery stores, e-commerce and food service. ¹³
	Jubilant FoodWorks	Food service company	Operates food service businesses such as Domino's and Dunkin' Donuts. Offers 'The Unthinkable Pizza' featuring plant-based chicken, available in Domino's food service. ¹⁴
	GoodDot	PBM start-up	Offers PBM based on soy, pea and wheat including Proteiz plus (high-protein substitute for chicken) and ready-to-eat meals such as biryani, pulao and Thai curry. Available in grocery stores, e-commerce and food service (GoodDO, own food stall brand).
	Vezlay	Plant-based manufacturer	Offers frozen and ready-to-eat Western and Indian-style PBM based on soy including nuggets, kebabs, burger patties, mutton and chicken tikka and shawarma. Available in grocery stores and e-commerce.
	Imagine Meats	PBM brand	Products in development will cater to regional tastes across India. ¹⁵ Partnership with American ingredient manufacturer Archer-Daniels-Midland (ADM) to offer PBM based on soy and pea protein, including kebabs, biryani and curries. ¹⁶
	PlantMade	Plant-based food manufacturer	Company catering to India's 'pure vegetarian' (vegan) market. Initially producing plant-based egg and dairy alternatives, the Peshwari Sikh Kebab is its first PBM product. Products in development include sausages and nuggets. Available frozen from online store. ¹⁷
	greenest	PBM brand from food tech start-up Upstablish	Offers frozen PBM catering to the tastes of Indian consumers. Products are made from soy and chickpeas and include various flavours of plant-based shami kebabs, and keema (mince style dish). Available from online store. ¹⁸

International brands in market

	Beyond Meat (USA)	Beyond Beef Burger and Beyond Sausage available in e-commerce (Urban Platter) since April 2021. ¹⁹
--	--------------------------	---

DISTRIBUTION CHANNELS

Distribution channels in India are underdeveloped and present a significant challenge for exporters.²⁰ A lack of cold chain distribution (despite some recent improvement) has led most retailers to prefer shelf-stable products.²¹

India's grocery retail distribution network is multidimensional involving a range of players including clearing and forwarding agents, wholesalers, importers and distributors. Retail opportunities are unevenly distributed across India. Small neighbourhood stores (known as kirana) and pushcart vendors remain the most common outlet to purchase groceries, especially in lower-tier cities and rural areas accounting for 92% of all retail formats and the majority of customer foot traffic. However, there is increasing competition from modern food retail which is experiencing rapid growth in India's leading cities.²²


Examples of India's largest food retailers are Reliance Retail (Reliance Fresh, Reliance Smart), Future Value Retail (Foodhall, Big Bazaar, KB Fair Price, Heritage Fresh) and Tata Group (HyperMarket, SuperMarket).²³ PBM is also commonly found in gourmet grocery stores including Foodhall, Le Marche, Urban Platter, Nature's Basket and Modern Bazaar.²⁴

E-commerce, including online retailers and food and grocery delivery apps are an important platform for Indian consumers and have grown significantly during nationwide COVID-19 lockdowns.²⁵ E-commerce can operate at a national or city level; some examples are Flipkart, Urban Platter, Amazon, Big Basket, MilkBasket and Grofers.²⁶ Cold chain infrastructure for last mile delivery is lacking, but under development. Amazon is piloting a project in 2021, with an initial focus on India-made products.²⁷

LABELLING LAWS

The Food Authority (FSSAI – Food Safety and Standards Authority of India) is the sole authority for food products imported into India. Other products, such as supplements can be subject to regulation by different authorities, such as the Ministry of Health, with some overlapping responsibilities.²⁸ It is recommended to seek advice from a local importer for up-to-date and accurate information. India's labelling requirements are outlined by the FSSAI.²⁹

The following information is based on the Food Safety and Standards (Labelling and Display) Regulations which were last amended in November 2020³⁰ and are set to be implemented from November, 2021.³¹ Labels must be in English or Hindi in Devanagari script.

Element	Detail
Name of food	Name that indicates true nature of the food such as a common name.
List of ingredients	Listed with an appropriate title such as 'Ingredients'. Ingredients must be in descending order by weight, including compound ingredients and food additives, and specific names used unless falling under specific class titles.
Nutritional information	Listed per 100g/mL or per serving, and per serve percentage (%) contribution to the daily Recommended Dietary Allowance for an average adult. Includes: energy value (kcal), protein, carbohydrates including total sugars and added sugars, total fat including saturated fat, trans fat and cholesterol, sodium and any nutrient subject to a claim.
Declaration of vegetarian or non-vegetarian food	Vegetarian food products will be declared by a green colour-filled circle inside a square with green outline near the product's name. A minimum size is specified depending on the principal display panel. 
Declaration of food additives	Use specific names or recognised International Numbering System (INS).
Name and complete address	Name and complete address of the brand owner, regardless of whether it is the manufacturer. Must be preceded by qualifying words e.g. 'Manufactured by', 'Packed and marketed by'.
FSSAI logo and license	Must be displayed in contrast colour to the background and

number	include the name and address of importer for imported food products.
Net quantity	Quantity declared by weight or volume in metric units.
Lot, code or batch identification	Mark of identification by which product can be traced in manufacture and identified in distribution.
Date marking	Must declare 'date of manufacture or packaging' and 'expiry/use by'. Date, month and year in DD/MM/YY format if shelf life is <three months. Month (abbreviated in capital letters e.g. JAN) and year if shelf life is >three months. Must declare any storage conditions related to maintaining shelf life.
Country of origin	If relevant, the second country in which a product undergoes further processing which changes its nature is considered the country of origin.
Instructions for use	To ensure proper utilisation of food.
Allergen declaration	Declared separately as 'Contains...' Allergens include: cereals containing gluten, crustacea, milk, eggs, fish, peanuts, tree nuts and soybeans, sulphites in concentrations of 10mg/kg or more, and all their products. Warnings of cross-contamination may be declared separately as 'May contain...'

Additional regulatory information:

The Food Safety and Standards (Import) Regulations, 2017 outline additional requirements of imported products such as licensing and clearance of imported food.

- For example: the vegetarian/non-vegetarian logo, name and address of importer, FSSAI logo and license number are considered "rectifiable labelling deficiencies", which can be addressed at the custom-bound warehouse by affixing non-detachable stickers.³²

The Office of Legal Metrology (OLM) under the Ministry of Consumer Affairs, Food & Public Distribution also regulates food labelling. This is largely superseded by FSSAI's regulations with the exception of the following.³³

- The maximum retail price (MRP) at which the product may be sold to the end consumer must be declared, inclusive of all taxes.
- Genetically modified products must be labelled with the acronym "GM".

TARIFFS

The HS tariff code for protein concentrates for both Australian and New Zealand exports is 2106.10.

India imposes high tariffs, which is a key barrier for exporters to a price-sensitive market. For imports from all countries, including Australia and New Zealand, the rate is currently set at 40%.

USEFUL RESOURCES

Austrade (contact page)

[India Market Profile](#)

[Austrade Food and Agribusiness to India](#)

[Austrade Premium Food and Beverage to India](#)

Department of Foreign Affairs & Trade

[DFAT Free Trade Agreement Portal](#)

NZ Trade & Enterprise (contact page)

[NZTE Tariff Finder](#)

[India Market Profile \(available to registered NZTE customers\)](#)

USDA Foreign Agricultural Service

[India Exporting Resources](#)

India Trade Portal

REFERENCES

- ¹ TechSci Research. Indian Meat Substitutes Market. Research and Markets. 2021 Apr. Available from: <https://www.researchandmarkets.com/reports/5306205/india-meat-substitutes-market-by-product-quorn>
- ² Lim G.Y. Next Meats jumps on plant-based trend in Japan with yakiniku and gyudon products. Food Navigator Asia. 2020 Oct 06. Available from: <https://www.foodnavigator-asia.com/Article/2020/10/06/Local-dishes-Next-Meats-jumps-on-plant-based-trend-in-Japan-with-yakiniku-and-gyudon-products#:~:text=Japanese%20start%20Dup%20Next%20Meats,t o%20the%20global%20food%20crisis.>
- ³ Desai S. Mock Meat: A fad or a fix. The Times of India. 2021 Feb 8. Available from: <https://timesofindia.indiatimes.com/life-style/food-news/mock-meat-a-fad-or-a-fix/articleshow/80753573.cms>
- ⁴ Bhagat M. Bird flu scare and non veg cravings? Wary Delhiites look for safe food options. Hindustan Times. 2021 Jan 14. Available from: <https://www.hindustantimes.com/lifestyle/health/bird-flu-scare-and-non-veg-cravings-wary-delhiites-look-for-safe-food-options-101610625670692.html>
- ⁵ Patil U. & Sandoval L. India Emerges as a Burgeoning Market for Plant-based Meat Substitutes. USDA Foreign Agricultural Service. 2021 May 7. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=India%20Emerges%20as%20a%20Burgeoning%20Market%20for%20Plant-based%20Meat%20Substitutes_Mumbai_India_05-03-2021
- ⁶ Bryant C., Szejda K., Parekh N., Deshpande V. & Tse B. A Survey of Consumer Perceptions of Plant-Based and Clean Meat in the USA, India, and China. Frontiers in Sustainable Food Systems. 2019 Feb 27. Available from: <https://www.frontiersin.org/articles/10.3389/fsufs.2019.00011/full>
- ⁷ Rosman M., Pandey, S. & Patil U. Exporter Guide: India. USDA Foreign Agricultural Service. 2021 Jan 4. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_New%20Delhi_India_12-31-2020
- ⁸ Patil U. & Sandoval L. India Emerges as a Burgeoning Market for Plant-based Meat Substitutes. USDA Foreign Agricultural Service. 2021 May 7. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=India%20Emerges%20as%20a%20Burgeoning%20Market%20for%20Plant-based%20Meat%20Substitutes_Mumbai_India_05-03-2021
- ⁹ Sawant A. & Patil U. Retail Foods: India. USDA Foreign Agricultural Service. 2020 Jul 2. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Retail%20Foods_New%20Delhi_India_06-30-2020
- ¹⁰ Austrade. Food and agribusiness to India. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries-and-economies/india/industries/food-and-agribusiness-to-india>
- ¹¹ Patil U. & Sandoval L. India Emerges as a Burgeoning Market for Plant-based Meat Substitutes. USDA Foreign Agricultural Service. 2021 May 7. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=India%20Emerges%20as%20a%20Burgeoning%20Market%20for%20Plant-based%20Meat%20Substitutes_Mumbai_India_05-03-2021
- ¹² Austrade. Food and agribusiness to India. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries-and-economies/india/industries/food-and-agribusiness-to-india>
- ¹³ Karelia G. Goa Startup's Vegan Jackfruit 'Meat' Needs No Refrigeration, Can Last Upto One Year. The Better India. 2021 Mar 5. Available from: <https://www.thebetterindia.com/250462/goa-food-startup-wakao-foods-sairaj-dhond-covid-19-lockdown-jackfruit-meat-vegan-lifestyle-mock-meat-healthy-food-gop94/>
- ¹⁴ Dutta S. Domino's Pizza introduces The Unthinkable Pizza- India's first Plant-Protein Pizza 100% Vegetarian, 100% Chicken-Like! Jubilant FoodWorks. 2020 Dec 22. Available from: <https://www.jubilantfoodworks.com/Uploads/Files/720jf-PressReleasePlantProtein.pdf>
- ¹⁵ Ho S. Billion Dollar Opportunity: Smart Protein Summit Highlights India's Growing Alt Protein Industry. Green Queen. 2020 Oct 13. Available from: <https://www.greenqueen.com.hk/billion-dollar-opportunity-smart-protein-summit-highlights-indias-booming-alt-protein-industry/>
- ¹⁶ Lim G.Y. India's Imagine Meats to roll out plant-based kebab, biryani and curry products in Mumbai. Food Navigator Asia. 2020 Sep 2. Available from: <https://www.foodnavigator-asia.com/Article/2020/09/02/India-s-Imagine-Meats-to-roll-out-plant-based-kebab-biryani-and-curry-products-in-Mumbai>
- ¹⁷ Ho S. PlantMade Brings the First Vegan Lamb Kebabs to India. Green Queen Media. 2021 July 13. Available from: <https://www.greenqueen.com.hk/plantmade-india-vegan-lamb-kebabs/>
- ¹⁸ Ho. S. Greenest: India's First 'Hyper-Realistic' Plant-Based Shami Kebabs Launch In Delhi. Green Queen Media. 2020 Nov 17. Available from: <https://www.greenqueen.com.hk/greenest-indias-first-hyper-realistic-plant-based-shami-kebabs-launch-in-delhi/>
- ¹⁹ Ambwani M.V. & Narayanan C. Meat alternatives get more pizzazz. The Hindu Business Line. 2021 May 3. Available from: <https://www.thehindubusinessline.com/catalyst/meat-alternatives-become-popular/article34465258.ece>
- ²⁰ Austrade. Premium food and beverage to India. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries-and-economies/india/industries/premium-food-and-beverage-to-india>
- ²¹ Austrade. Food and agribusiness to India. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries-and-economies/india/industries/food-and-agribusiness-to-india>
- ²² Rosman M., Pandey, S. & Patil U. Exporter Guide: India. USDA Foreign Agricultural Service. 2021 Jan 4. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_New%20Delhi_India_12-31-2020
- ²³ Sawant A. & Patil U. Retail foods: India. USDA Foreign Agricultural Service. 2020 Jul 2. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Retail%20Foods_New%20Delhi_India_06-30-2020
- ²⁴ Austrade. Food and agribusiness to India. Austrade. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries-and-economies/india/industries/food-and-agribusiness-to-india>
- ²⁵ Rosman M., Pandey, S. & Patil U. Exporter Guide: India. USDA Foreign Agricultural Service. 2021 Jan 4. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=India%20Emerges%20as%20a%20Burgeoning%20Market%20for%20Plant-based%20Meat%20Substitutes_Mumbai_India_05-03-2021

ByFileName?fileName=Exporter%20Guide_New%20Delhi_India_12-31-2020

²⁶ Austrade. Premium food and beverage to India. Austrade. N.d. Available from:

<https://www.austrade.gov.au/australian/export/export-markets/countries-and-economies/india/industries/premium-food-and-beverage-to-india>

²⁷ Money Control. Amazon India begins pilot project to buy directly from farmers: Report. 2019 Dec 19. Available from:

<https://www.moneycontrol.com/news/business/companies/pwc-india-to-invest-rs-1600-crore-create-10000-additional-jobs-over-5-years-7315141.html>

²⁸ Rosman M., Pandey, S. & Patil U. Exporter Guide: India. USDA Foreign Agricultural Service. 2021 Jan 4. Available from:

https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_New%20Delhi_India_12-31-2020

²⁹ Food Safety and Standards Authority of India. Labelling Requirements as per FSS Regulation(s) 2011. Available from:

<https://fics.fssai.gov.in/AOLLogin.aspx>

³⁰ The Gazette of India. Gazette Notification on Food Safety and Standards (Labelling and Display) Regulations, 2020. Food Safety and Standards Authority of India. 2020 Nov 17. Available from:

https://www.fssai.gov.in/upload/notifications/2020/12/5fd87c6a0f6adGazette_Notification_Labelling_Display_14_12_2020.pdf

³¹ Mani R. & Beillard M.J. Food and Agricultural Import Regulations and Standards Country Report – 2020: India. USDA Foreign Agricultural Service. 2020 Dec 30. Available from:

http://agriexchange.apeda.gov.in/IR_Standards/Import_Regulation/FoodandAgriculturalImportRegulationsandStandardsCountryReportNewDelhiIndia12312020.pdf

³² The Gazette of India. Gazette Notification on Food Safety and Standards (Import) Regulation, 2017. Food Safety and Standards Authority of India. 2017 Mar 9. Available from:

https://archive.fssai.gov.in/dam/jcr:8b5ec610-fa13-426f-856d-52686f4b48f9/Gazette_Notification_Food_Import_20_03_2017.pdf

³³ FAS New Delhi. Food and Agricultural Import Regulations and Standards Country Report: India. USDA Foreign Agricultural Service. 2020 Feb 4. Available from:

https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20Country%20Report_New%20Delhi_India_12-31-2019

MARKET PROFILE: INDONESIA



The plant-based market is still very early in their journey, but we definitely see a rising trend of flexitarianism and veganism in the big cities.”

- GREEN REBEL FOODS, INDONESIA

MARKET SIZE

In the wider Asia-Pacific region, the 'meat substitute market' was worth US\$15.3B in 2019, up 4.75% from 2018. The pandemic has accelerated that growth, with the market forecast to expand 11.6% to US\$17.1B in 2020.¹

CONSUMER DEMAND

In 2018, 25.4% of Indonesia's population (66.9 million people) were vegetarian, attributable to a combination of increasing Buddhist and Hindu populations,² lower-income earners being unable to afford more expensive animal meat protein options, and some higher-income earners opting for a vegetarian diet.

Indonesia's consumer market is segmented, with consumers dispersed across 17,500 islands with different cultures, tastes, preferences and varying levels of economic development.³ Indonesia's growing urban middle class presents an opportunity for plant-based meat (PBM) with a flexitarian diet mainly followed by middle to upper-income consumers with increasing health consciousness.⁴ Australian food products are popular with this market who tend to be more familiar with imported products.⁵

The broader Indonesian consumer base is price-sensitive and has a preference for local brands, especially in the food and beverage sector, which may present a challenge for Australian and New Zealand exporters⁶ who will face strong competition from local manufacturers and other exporters across most categories and price segments.⁷

The Indonesian government has supported a buy-local movement with campaigns such as "100% Love Indonesia" in 2009 and "Proud of Indonesian Products" in 2021.⁸

The government also maintains a long-standing agenda for Indonesia's self-sufficiency in ensuring food security, often imposing trade barriers to prioritise domestic production to meet demand.⁹

Indonesia's developing tourism sector is largely centred around Bali and is expected to expand post COVID-19. This area presents a market for the consumption of Western-style foods by tourists.¹⁰





66.9M



**WERE VEGETARIAN
IN 2018**

PLANT-BASED MEAT BRANDS IN MARKET

Examples of major local plant-based meat brands

	Green Rebel Foods	PBM start-up	Offers ready-to-eat PBM based on soy, seitan and mushroom including Chick'n Satay, Yellow Spiced Chick'n, Beefless Rendang and Maranggi Beefless Satay. Available in grocery stores, e-commerce and food service (such as Beefless Chunks in the Plant-Based Wellington Pocket at Starbucks). ¹¹
	Mileva	Brand by plant-based food manufacturer PT. Karya Cipta Nabati Food	Offers PBM based on soy including satay, pandan fried chicken, empal (spiced fried beef), Thai chili fish and spicy teriyaki chicken. Available in grocery stores and e-commerce.
	Proteina	Brand by plant protein manufacturer PT. Aneka Sarivita	Offers texturised vegetarian protein (TVP) based on soy in different sizes and shapes and ready-to-eat meals in its 'Protamil' series such as rendang and opor. Available in grocery stores and e-commerce.
	Meatless Kingdom	Brand by plant-based food start-up PT. Yasa Mushroom Sriwijaya	Offers PBM primarily based on mushrooms including nuggets, jerky, siomay bandung (fish dumplings), fish fillet and Japanese dumplings. Available in e-commerce.

International brands in market

	The Vegetarian Butcher (The Netherlands)	Beef patty is available in Burger King's Plant-Based Whopper since May 2021. ¹²
	Beyond Meat (USA)	Sausages and beef patties are available in food service (such as Barnyard Burger at BlueZone Center) ¹³ and e-commerce (Tokopedia).
	Impossible (USA)	Available in food service (such as Impossible Pizza and Barbeque Impossible Burger at Ivy Restaurant). ¹⁴
	Fry's (South Africa)	Sausages and nuggets are available in e-commerce (Tokopedia).

DISTRIBUTION CHANNELS

Freight and transport networks can be expensive and complex in Indonesia due to the nature of its archipelago spanning thousands of islands.¹⁵ Infrastructure including cold storage facilities can be inadequate outside of the main island of Java.¹⁶

Most retailers in Indonesia do not import directly and rely on local importers. Local importers and distributors are responsible for registering processed food products with the National Agency of Food and Drug Control (BPOM), a process which usually takes between 6-12 months.¹⁷ They are also responsible for a product's safety.¹⁸

Traditional retail in Indonesia holds 82% of market share, consisting of outdoor markets and independent grocery stores.¹⁹ While the modern retail sector comprises only a small portion of total sales,²⁰ its annual growth is exceeding that of traditional retail.²¹ Large hypermarkets in Indonesia include Lotte Mart, Hypermart, Giant and Transmart Carrefour & Carrefour. Major supermarkets include Superindo, Food Mart Hero and Alfa Midi. Some mid to high-end supermarkets that carry several imported goods include Kem Chiks, The Food Hall and Ranch Market & Farmers Market. Convenience stores, such as Indomaret and Alfamaret, are the fastest growing retail segment, however few imported goods are available at these outlets.²²

With an Internet penetration rate of 73.7% and 196 million Internet users in 2019,²³ e-commerce is a fast-growing industry in Indonesia. While e-commerce for groceries is still in early stages of development, the industry is expected to undergo further growth driven by continual improvement of logistics and smartphone penetration.²⁴ Major e-commerce platforms that sell groceries are Lazada, Bukalapak, Shopee, Tokopedia, HappyFresh and Blibli.

LABELLING LAWS

Indonesia has an unpredictable regulatory environment. Along with a tendency to change regularly,²⁵ the regulation of food labelling and marketing can be confusing, unclear and enforced haphazardly by various relevant authorities.²⁶ It is consequently essential to seek advice from a local partner.

All food products are regulated by Indonesia's Food Law No. 18/2012. Processed food products are regulated by both the Ministry of Trade and the National Agency of Food and Drug Control (BPOM), with whom products must also be registered.

Imported food products must be labelled in Bahasa Indonesia, except words for which there is no Indonesian substitute which must be pre-approved by authorities. Labels can take the form of a sticker label affixed prior to customs clearance and must contain the following:²⁷

Element	Detail
Name of product	
Ingredient list	<p>If containing food additives, must include food additive's name, group name (e.g. preservative) and registration number.</p> <p>Artificial sweeteners must be declared with additional requirements such as a contains statement, sweetener level content, sugar equivalence and Acceptable Daily Intake (ADI).</p> <p>Products containing food colouring (pewarna) should be stated in a green box with green capital letters and include the Colour Index (CI) and M (Makanan meaning food) logo.</p>
Net weight or volume	
Name and address of manufacturer and importer	
Date and/or production code	



Expiry date, month and year	.
BPOM registration number	Imported food products will have an ML product number issued by BPOM.
2D Barcode Identification	Contains information about the ML number and expiry date, issued by BPOM.
Sources of certain ingredients	Must declare ingredients that are irradiated, derived from genetically engineered products and organic with the relevant logos.
Nutritional information	<p>Include serving size and amount of servings per package.</p> <p>Include amount of: total energy, total fat, saturated fat, protein, total carbohydrate, sugar, salt and non-nutritional content (e.g. vitamins and minerals) with their corresponding Recommended Dietary Allowances percentage (localised as %AKG).</p> <p>Must declare allergens including: cereals containing gluten, shellfish, eggs, fish, peanuts, soybeans, milk, tree nuts, sulphites over 100ppm, and all their products.</p>

Additional regulatory information:

- Food product claims can only be included if supported by verifiable scientific evidence.
- BPOM has a list of permitted food additives and their maximum limits for usage.
- Processed foods must display the following health message on the label: "consuming more than 50 grams of sugar, 2,000 milligrams of Sodium, or 67 grams of fat per person per day increase the risk of hypertension, stroke, diabetes, and heart attack."
- The 2014 Halal Product Assurance Law came into force in October 17, 2019 however implementation of regulations has yet to be finalised. It is expected that all food

and beverage products will require halal certification and labelling by 2024 under this new law.

TARIFFS

The tariff code for protein concentrates for both Australian and New Zealand exports is 2106.10.

Both Australian and New Zealander exporters have tariff-free access under ASEAN-Australia-New Zealand Free Trade Agreement (AANZFTA).

Australian exporters also enjoy tariff-free access under Indonesia-Australia Comprehensive Economic Partnership Agreement (IACEPA).

USEFUL RESOURCES

Austrade (contact page)

[Indonesia Market Profile](#)

[Austrade Food and Beverage to Indonesia](#)

Department of Foreign Affairs & Trade

[DFAT Free Trade Agreement Portal](#)

NZ Trade & Enterprise (contact page)

[NZTE Tariff Finder](#)

[Indonesia Market Profile \(available to registered NZTE customers\)](#)

USDA Foreign Agricultural Service

[Indonesia Exporting Resources](#)

REFERENCES

- ¹ Lim G.Y. Next Meats jumps on plant-based trend in Japan with yakiniku and gyudon products. Food Navigator Asia. 2020 Oct 06. Available from: <https://www.foodnavigator-asia.com/Article/2020/10/06/Local-dishes-Next-Meats-jumps-on-plant-based-trend-in-Japan-with-yakiniku-and-gyudon-products#:~:text=Japanese%20start%2Dup%20Next%20Meats,t o%20the%20global%20food%20crisis.>
- ² Wan L. Asia dominates vegetarian markets but understanding local factors crucial for sales success. Food Navigator Asia. 2018 Aug 2. Available from: <https://www.foodnavigator-asia.com/Article/2018/07/02/Asia-dominates-vegetarian-markets-but-understanding-local-factors-crucial-for-sales-success>
- ³ Asialink Business. Country starter pack: Indonesia. Asialink Business. Page 33. 2017 Feb. Available from: <https://asialinkbusiness.com.au/research-resources/indonesia-country-starter-pack>
- ⁴ Wan L. Asia dominates vegetarian markets but understanding local factors crucial for sales success. Food Navigator Asia. 2018 Aug 2. Available from: <https://www.foodnavigator-asia.com/Article/2018/07/02/Asia-dominates-vegetarian-markets-but-understanding-local-factors-crucial-for-sales-success>
- ⁵ Austrade. Food and Beverage to Indonesia. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/indonesia/industries/food-and-beverage>
- ⁶ Asialink Business. Country starter pack: Indonesia. Asialink Business. Page 34. 2017 Feb. Available from: <https://asialinkbusiness.com.au/research-resources/indonesia-country-starter-pack>
- ⁷ Austrade. Food and Beverage to Indonesia. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/indonesia/industries/food-and-beverage>
- ⁸ Office of Assistant to Deputy Cabinet Secretary for State Documents & Translation. President Jokowi Calls for Use of Domestic Products. Cabinet Secretariat of the Republic of Indonesia. 2021 Mar 4. Available from: <https://setkab.go.id/en/president-jokowi-calls-for-use-of-domestic-products/>
- ⁹ Yuningsih N. Exporter Guide: Indonesia. USDA Foreign Agricultural Service. 2021 Jan 7. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_Jakarta_Indonesia_12-31-2020
- ¹⁰ Austrade. Food and Beverage to Indonesia. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/indonesia/industries/food-and-beverage>
- ¹¹ Neo P. Authentic approach: Indonesia's first plant-based meat firm Green Butcher banks on local flavours to pique interest. Food Navigator Asia. 2021 Feb 23. Available from: <https://www.foodnavigator-asia.com/Article/2021/02/23/Authentic-approach-Indonesia-s-first-plant-based-meat-firm-Green-Butcher-banks-on-local-flavours-to-pique-interest>
- ¹² Burger King Indonesia Facebook post. 2021 May 7. Available from: <https://www.facebook.com/burgerkingindonesia/photos/a.10150677739126284/10158693631831284>
- ¹³ Carnelian C. 4 Restaurants with Beyond Meat and Impossible Burger in Jakarta. Rukita. 2020 Sep 7. Available from: <https://www.rukita.co/stories/impossible-burger-jakarta/>
- ¹⁴ Ivy Kitchen. Dine In & Take Away Menu. Available from: <http://www.ivy.kitchen/menu>
- ¹⁵ Austrade. Food and Beverage to Indonesia. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/indonesia/industries/food-and-beverage>
- ¹⁶ Yuningsih N. Exporter Guide: Indonesia. USDA Foreign Agricultural Service. 2021 Jan 7. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_Jakarta_Indonesia_12-31-2020
- ¹⁷ Austrade. Food and Beverage to Indonesia. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/indonesia/industries/food-and-beverage>
- ¹⁸ Austrade. Food and Beverage to Indonesia. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/indonesia/industries/food-and-beverage>
- ¹⁹ Yuningsih N. Exporter Guide: Indonesia. USDA Foreign Agricultural Service. 2021 Jan 7. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_Jakarta_Indonesia_12-31-2020
- ²⁰ Austrade. Food and Beverage to Indonesia. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/indonesia/industries/food-and-beverage>
- ²¹ Yuningsih N. Retail Foods: Indonesia. USDA Foreign Agricultural Service. 2020 Jul 7. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Retail%20Foods_Jakarta_Indonesia_06-30-2020
- ²² Yuningsih N. Exporter Guide: Indonesia. USDA Foreign Agricultural Service. 2021 Jan 7. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_Jakarta_Indonesia_12-31-2020
- ²³ Eloksari E.A. Indonesia internet users hit 196 million, still concentrated in Java: APJII survey. The Jakarta Post. 2020 Nov 11. Available from: <https://www.thejakartapost.com/news/2020/11/11/indonesian-internet-users-hit-196-million-still-concentrated-in-java-apjii-survey.html>
- ²⁴ Moore B., Akib K. & Sugden S. E-commerce in Indonesia: A guide for Australian business. Austrade. 2018. Available from: <https://www.austrade.gov.au/ArticleDocuments/1358/E-commerce-in-Indonesia-Guide.pdf.aspx>
- ²⁵ Asialink Business. Country starter pack: Indonesia. Asialink Business. Page 34. 2017 Feb. Available from: <https://asialinkbusiness.com.au/research-resources/indonesia-country-starter-pack>
- ²⁶ Yuningsih N. Exporter Guide: Indonesia. USDA Foreign Agricultural Service. 2021 Jan 7. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_Jakarta_Indonesia_12-31-2020
- ²⁷ FAS Jakarta. Food and Agricultural Import Regulations and Standards Country Report: Indonesia. USDA Foreign Agricultural Service. 2021 Jan 27. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20Country%20Report_Jakarta_Indonesia_12-31-2020

MARKET PROFILE: JAPAN



Sales of alternative meat products in Japan could double to reach \$312 million annually by 2023.”

- UNITED STATES DEPARTMENT OF AGRICULTURE

MARKET SIZE

Sales of alternative meat products in Japan could double to reach \$312M annually by 2023.¹ In the wider Asia-Pacific region, the 'meat substitute market' was worth US\$15.3B in 2019, up 4.75% from 2018. The pandemic has accelerated that growth, with the market forecast to expand 11.6% to US\$17.1B in 2020.²

CONSUMER DEMAND

Japanese consumers are already accustomed to plant-based protein, with soy-based products such as tofu and natto ubiquitous in Japanese cuisine.

It is estimated that about 4% of the Japanese population are vegetarian, while a further 16% are flexitarian (seeking to reduce their consumption of animal-based foods), accounting for a total of 5.1 million and 20.2 million people respectively in 2020.³

Consumers of plant-based meat (PBM) are more likely to be driven by health concerns rather than environmental concerns, particularly due to existing perceptions of soy as a healthy food.⁴

Plant-based meat (PBM) is a relatively new market in Japan that has gained traction since 2019, partly catering for increased tourist numbers from major international events such as the Rugby World Cup.⁵ Japanese consumers like to follow foreign trends, such as from the U.S., where the use of media has been an effective platform to influence consumer demand and increase sales. Events and exhibitions are also useful to promote products to Japanese consumers.⁶

The Ministry of Health, Labour and Welfare's April 2020 campaign to increase the target for dietary protein intake has made food manufacturers more conscious of developing high-protein products.⁷

The Japanese processed food sector is diverse, competitive and sophisticated, catering to quality and price conscious consumers. Australia enjoys an outstanding reputation in Japan as a supplier of safe, healthy and high-quality food, both processed and fresh.⁸

BY 2023 SALES COULD



US\$312M

IN JAPAN TO



PLANT-BASED MEAT BRANDS IN MARKET

Examples of major local plant-based meat brands

	Next Meats	PBM company	Offers PBM focusing on Japanese cuisine such as yakiniku (BBQ style meat), gyudon (beef rice bowl) meat and burgers. Available in food service and e-commerce. ⁹
	Daizu Labo	Brand by processed food manufacturer Marukome	Offers PBM based on soy dry and frozen unflavoured formats and in ready-to-eat meals such as spicy mapo tofu, gapao rice (Thai fried rice) and keema curry. Available in e-commerce ¹⁰ and food service (such as burgers and onigiri at Lawson convenience stores ¹¹).
	Muji	Major lifestyle and food brand	Offers own-brand PBM which does not need to be chilled. Available in Muji stores or online.
	Marude Oniku	Brand by Ito Ham, a major meat company	Meaning 'Just Like Meat'. Offers flavoured ready-to-eat PBM based on soy including soy-style meat with garlic miso, chicken-style with herbs and lemon, and ham-style katsu. Available in grocery stores. ¹²
	NatuMeat	Brand by NH Foods, a major meat company	Offers PBM based on soy including sausages and luncheon-style meats. Available in grocery stores. ¹³
	Zero Meat	Brand by manufacturer Otsuka Foods	Offers PBM based on soy including ham, burgers with soy cheese and sausages. Available in food service ¹⁴ , grocery stores and e-commerce. ¹⁵
	Seven-11 and Family Mart	Convenience stores	Both launched house-brand ready-to-eat meals featuring PBM. ¹⁶

International brands in market

	Top Tier Foods (Canada)	Top Tier Foods launched Vegan Waygu end of 2020. ¹⁷	
	Beyond Meat (USA)	The Beyond Burger was offered on Japan Airlines flights from March – May 2020, but is not currently available in Japan otherwise. ¹⁸	
	v2food (Australia)	The v2burger is available at Burger King in the plant-based Rebel Whopper. ¹⁹	

DISTRIBUTION CHANNELS

Most food products are sold wholesale to retail or food service, with a small number of local wholesalers dominating. Manufacturers and importers have historically used these wholesalers to distribute products to Japanese retailers and consumers. The traditional distribution channels for processed food are multi-layered and relatively complex with personal, historical and financial relations playing a role in the decision-making process.²⁰

Distribution channels are becoming simpler, as small to medium sized wholesalers merge to achieve economies of scale or bypass importers. Each product in the food and beverage industry has its own specialised wholesaler.

Japanese plant-based meat manufacturers commonly use a direct to consumer via online method, while the brands establish themselves and build a customer base through social media and marketing campaigns.

There are many supermarkets stocking western and/or plant-based items, in addition to convenience stores which are beginning to stock plant-based meat alternative products more frequently. These include: Costco, Aeon, Aoki, Bio C'Bon, Gyomu Supa, Kinokuniya, Seijo Ishii, Shizutetsu Store, Don Quixote, National Azabu, Natural House, Maruetsu, The largest supermarket chains in order of sales size are: Aeon, UNY Group, Ito Yokado and Life Corporation.

Japanese importers are generally responsible for ensuring that imported products comply with the relevant regulations. However, exporters to Japan should be aware that this is not always the case and check whether any contract places the legal responsibility for regulations with them.²¹ Your freight forwarder or import partner should be able to assist with this.

LABELLING LAWS

Food labelling must be in Japanese, and processed food labels must contain 10 elements:

Element	Detail
Name	(Not trading name) e.g. plant-based burger, in addition to brand and product name
Ingredients	Listed in descending order of the ingredients with highest weight ratio, clearly indicating information on allergens and genetic modification.
Additives	Listed in descending order of the allergens with highest weight ratio, clearly indicating information on allergens.
Weight/ Volume	For imported products, the place of the predominant ingredient by weight.
Region of origin	For domestic Japanese products.
Expiration date	Products which are perishable must present a use-by date, products which are long-life may use a best-before date.
Storage instructions	How to safely store products.
Country of origin	Indicate country of origin (for imported foods).
Manufacturers	Indicate names of food related business operators (manufacturers, importers, sellers, etc.) and their address.
Nutrition Components	Indicate serving size and nutrients (calories, protein, fat, carbohydrate and salt equivalent) per 100 g and per one serve. There are extra requirements for foods which want to display nutrient function claims (eg Iron for strong bones).

Additional regulatory information

- Officials from Consumer Affairs Agency, Ministry of Agriculture, Forestry & Fisheries and local officials conduct inspections of supermarkets to check labelling. If not appropriate, they offer guidance on what to improve.
- Seven allergens **must** be distinguished on labels: shrimp, crab, wheat, buckwheat, egg, dairy (milk) products, and peanut.
- 21 further allergens are optional to distinguish: Almond, abalone, squid, salmon, roe, orange, cashew nut, kiwi fruit, beef, walnut, sesame, salmon, mackerel, soybean, chicken, banana, pork, matsutake mushroom, peach, yam, apples, gelatin.
- Japan's regulations are not perfectly aligned with Codex Alimentarius, therefore exporters should confirm standards of use for additives and flavours.

TARIFFS

The tariff code for protein concentrates for both Australian and New Zealand exports is 2106.10.

Australian exporters enjoy tariff-free access to Japan under the Japan Australia Free Trade Agreement (JAEPFA), while tariffs under the Comprehensive and Progressive Trans-Pacific Partnership (CPTPP) are currently 6.6% falling to 3.7% on 04/04/23.

New Zealand exporters can access the CPTPP rate of 6.6% from 01/04/21, falling to 3.7%.

Both Australia and New Zealand exporters can access the new Regional Comprehensive Economic Partnership (RCEP) free-trade agreement, expected to enter into force in 2021. Tariffs for 2106.10 will be unbound (set at zero).

USEFUL RESOURCES

Austrade (contact page)

[Japan Market Profile](#)

[Austrade Processed food to Japan](#)

Department of Foreign Affairs & Trade

[DFAT Free Trade Agreement Portal](#)

NZ Trade & Enterprise (contact page)

[NZTE Tariff Finder](#)

[Japan Market Profile \(available to registered](#)

[NZTE customers\)](#)

USDA Foreign Agricultural Service

[Japan Exporting Resources](#)

REFERENCES

- ¹ Imaizumi A. Japanese Companies Exploring Alternative Meat Products. USDA Foreign Agricultural Service. 2020 Jan 24. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Japanese%20Companies%20Exploring%20Alternative%20Meat%20Products_Tokyo_Japan_01-24-2020
- ² Lim G.Y. Next Meats jumps on plant-based trend in Japan with yakiniku and gyudon products. Food Navigator Asia. 2020 Oct 6. Available from: <https://www.foodnavigator-asia.com/Article/2020/10/06/Local-dishes-Next-Meats-jumps-on-plant-based-trend-in-Japan-with-yakiniku-and-gyudon-products#:~:text=Japanese%20start%2Dup%20Next%20Meats,t o%20the%20global%20food%20crisis>
- ³ Fitch Solutions Country Risk & Industry Research. Alternative Proteins: Plant-Based 'Meat' Alternatives Finding A Foothold In Japan. Fitch Solutions. 2020 Dec 14. Available from: <https://www.fitchsolutions.com/consumer-retail/alternative-proteins-plant-based-meat-alternatives-finding-foothold-japan-14-12-2020>
- ⁴ Team Meros. Yes, plant-based meat has exploded in the Japan market, but it looks quite different from the alternative protein booms in Western markets. Meros Consulting. 2021 Feb 26. Available from: <https://merosconsulting.com/plant-based-meat-has-exploded-in-the-japan-market-but-the-drivers-do-not-mirror-the-alternative-proteins-booms-in-western-markets/>
- ⁵ Fitch Solutions Country Risk & Industry Research. Alternative Proteins: Plant-Based 'Meat' Alternatives Finding A Foothold In Japan. Fitch Solutions. 2020 Dec 14. Available from: <https://www.fitchsolutions.com/consumer-retail/alternative-proteins-plant-based-meat-alternatives-finding-foothold-japan-14-12-2020>
- ⁶ Consumers, Health Agriculture and Food Executive Agency (CHAFAEA). The Food and Beverage Market Entry Handbook: Japan. European Commission. 2019. Available from: https://ec.europa.eu/chafea/agri/sites/default/files/handbook-japan-2019_en_0.pdf
- ⁷ The Health Industry News. Ministry of Health, Labor and Welfare Raises the Intake Target of Protein for Undernutrition and Flail Prevention. Informa Markets Japan. 2020 Mar 19. Available from: <https://www.hijapan.info/en/2817/>
- ⁸ Austrade. Processed food to Japan. Austrade. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/japan/industries/Food-and-beverage-processed-food>
- ⁹ Lim G.Y. Next Meats jumps on plant-based trend in Japan with yakiniku and gyudon products. Food Navigator Asia. 2020 Oct 6. Available from: <https://www.foodnavigator-asia.com/Article/2020/10/06/Local-dishes-Next-Meats-jumps-on-plant-based-trend-in-Japan-with-yakiniku-and-gyudon-products#:~:text=Japanese%20start%2Dup%20Next%20Meats,t o%20the%20global%20food%20crisis>
- ¹⁰ Daizu Labo. Marukome Website. N.d. Available from: https://www.marukome.co.jp/product/all/all/daizu_labo/
- ¹¹ Hisako. Rice balls and hamburgers using "DAIZU MEAT" made with vegetable protein are now available! Lawson. 2020 Jul 21. Available from: https://www.lawson.co.jp/lab/kenko/art/1402168_4665.html
- ¹² Kinase H. Japan's plant-based meat industry beefs up its menu. Japan Australia Business Creators. 2020 May 5. Available from: <https://www.j-abc.com/blog/archives/05-2020/2.html>
- ¹³ Neo P. What's the beef? Plant-based wagyu divides opinion among Japan's food industry. Food Navigator Asia. 2020 Nov 5. Available from: <https://www.foodnavigator-asia.com/Article/2020/11/04/What-s-the-beef-Plant-based-wagyu-divides-opinion-among-Japan-s-food-industry>
- ¹⁴ Otsuka Foods. Otsuka Foods Strengthens Restaurant Channel to Expand "Zero Meat" Series. Otsuka Foods Co., Ltd. 2021 Mar 31. Available from: <https://www.otsukafoods.co.jp/news/english/pdf/20210331.pdf>
- ¹⁵ Koe T. Zero meat: Japanese firm Otsuka Foods enters alternative protein market. Food Navigator Asia. 2018 Dec 10. Available from: <https://www.foodnavigator-asia.com/Article/2018/12/10/Zero-meat-Japanese-firm-Otsuka-Foods-enters-alternative-protein-market>
- ¹⁶ Sasatani D. Japan Begins to Explore Regulations for Alternative Meat Products. USDA Foreign Agricultural Service. 2020 Aug 17. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Japan%20Begins%20to%20Explore%20Regulations%20for%20Alternative%20Meat%20Products_Tokyo_Japan_08-12-2020
- ¹⁷ Neo P. What's the beef? Plant-based wagyu divides opinion among Japan's food industry. Food Navigator Asia. 2020 Nov 5. Available from: <https://www.foodnavigator-asia.com/Article/2020/11/04/What-s-the-beef-Plant-based-wagyu-divides-opinion-among-Japan-s-food-industry>
- ¹⁸ Asaf S. JAL to serve plant-based Beyond Meat on select flights. Business Traveller. 2020 Feb 28. Available from: <https://www.businesstraveller.com/business-travel/2020/02/28/jal-to-serve-plant-based-beyond-meat-on-select-flights/>
- ¹⁹ Ho S. Burger King Launches Plant-Based Whoppers Across Asia With v2food & The Vegetarian Butcher. Green Queen Media. 2021 Jan 14. Available from: <https://www.greenqueen.com.hk/burger-king-launches-plant-based-whoppers-across-asia-with-v2food-the-vegetarian-butcher/>
- ²⁰ Austrade. Processed food to Japan. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/japan/industries/Food-and-beverage-processed-food>
- ²¹ Austrade. Processed food to Japan. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/japan/industries/Food-and-beverage-processed-food>
- ²² Austrade. Processed food to Japan. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/japan/industries/Food-and-beverage-processed-food>

MARKET PROFILE: MALAYSIA



MARKET SIZE

The 'meat substitute' market in Malaysia is growing at 5.3% year-on-year.¹ In the wider Asia-Pacific region, the 'meat substitute market' was worth US\$15.3B in 2019, up 4.75% from 2018. The pandemic has accelerated that growth, with the market forecast to have expanded by 11.6% to US\$17.1B in 2020.²

CONSUMER DEMAND

Malaysian consumers' consumption of plant-based meat (PBM) is likely to be driven by health considerations, although religious, environmental and ethical concerns are gaining traction.³ In 2018, an estimated 25% of the population (7.9 million people) were flexitarian, and only occasionally consumed conventional meat.⁴

With an annual growth rate between 7% and 10%,⁵ food service channels should be an important consideration for PBM brands attributable to a relatively young and educated population that enjoys frequent dining out,⁶ and a culture of long working hours which encourages dining out for convenience.⁷

Malaysia is a price-sensitive market, with competitive pricing considered a key factor influencing the growth of PBM to be widely affordable.⁸ This has inhibited the popularity of PBM in the past, in addition to low mainstream awareness of the category. For PBM to succeed, exporters would need to pursue an aggressive marketing strategy.

“In Malaysia alone, the meat substitute category is growing at 5.3 per cent year-on-year, which shows that consumers are rethinking their health and wellbeing.”

- TYSON FOODS ASIA-PACIFIC







Malaysia's broad socio-economic groups and multiculturalism, notably Malay, Chinese and Indian ethnic populations, have created several distinct market segments, highlighting the importance of tailoring products to certain preferences⁹ including religious observations. For example, pork is primarily consumed by ethnic Chinese Malaysians,¹⁰ while poultry is the most popular conventional meat overall due its low price and consequent accessibility. PBM may also find success in Buddhist and Hindu communities (making up 26.1% of the Malaysian population)¹¹ which adopt more vegetarian diets.



Malaysia's growing middle class is an important segment characterised by an increasing awareness of quality and brands, increasing health and wellness trends¹² and a demand for imported goods.¹³ Due to a Muslim-majority population, a halal certification is advantageous, even if the product is not of animal origin.¹⁴

PLANT-BASED MEAT BRANDS IN MARKET

Examples of major local plant-based meat brands

	Phuture Meat	PBM start-up	Offers Asian and Western-style PBM using soy, chickpea, pea and rice proteins including burgers, pork-style mince, samosas, spring rolls and steamed buns. Available in grocery stores and e-commerce.
	Nanka	Brand by start-up Ira Noah PLT	Offers chicken and beef-style patties using jackfruit. Products in development include nuggets, hotdogs and mince. Available in e-commerce and food service.
	Everbest	Brand by soy manufacturer Everbest Soya Bean Products	Originally catered to vegetarian consumers, now offers frozen and shelf-stable soy based PBM including mock duck, Hong Kong BBQ meat-style, dumplings and chicken-style products. Available in grocery stores and e-commerce.
	Homey	Brand by plant-based food manufacturer LI-TER	Offers frozen and shelf-stable Asian and Western-style PBM based on soy including hot pot seafood-style balls, mock-prawns, ham, dumplings, nuggets and more. Available in grocery stores and e-commerce.
	Veat	Brand by food manufacturer Kawan Food	Offers PBM based on soy including Thai fish-style cakes and flavoured chicken-style bites. Available in grocery stores and e-commerce.
	First Pride	Brand by meat processor Tyson Foods	Local brand acquired by Tyson Foods. Diversifying into PBM based on bamboo fibre, soy and wheat protein under its 'Green Series'. Offers frozen PBM bites, nuggets and strips. Available in grocery stores and e-commerce. ¹⁵

Examples of international brands in market

	OmniMeat (Hong Kong)	Available in grocery stores since September 2020 ¹⁶ and in food service (such as 'Truffle Umami Beyond Burger' at La Juiceria Superfoods). Marketed as OmniMeat with a halal certification, rather than OmniPork. ¹⁷
	Harvest Gourmet (Switzerland)	Brand by Nestlé with local production facility in opened April 2021 in Shah Alam to serve the Asian market. ¹⁸ Available in grocery stores and e-commerce.
	Beyond Meat (USA)	Available in food service (such as Beyond Meat Katsu Sando at Sushi Ryu) since July 2019. ¹⁹ Available in grocery stores and e-commerce since December 2019. ²⁰
	Quorn (The Philippines)	Partnered with KFC Malaysia to offer the 'Zero Chicken Burger' since February 2021. ²¹
	Fry's (South Africa)	A range of products, including schnitzel, burger patties and sausages, are available in grocery stores and e-commerce.
	Veggie Delights (Australia)	A range of products, including sausages, burger patties and meatballs, are available in grocery stores and e-commerce.
	Alpha Foods (USA)	Ready-to-eat PBM burritos are available in grocery stores and e-commerce.

DISTRIBUTION CHANNELS

Distribution channels in Malaysia are well-developed with infrastructure considered among the best in the region, notwithstanding some fragmentation in less urbanised areas.²²

Most exporters use agents and distributors, with regulation covering this area limited. Contracts are relied upon to define and enforce the terms of the business relationship.²³ Commercial ties can also be relationship-based due to cultural reasons where continued business is forged by mutual commitment, good service and gestures of good faith. Malaysian distributors almost never assume responsibility for marketing unlike some other international markets.

Many agents and distributors work for trading companies that deal with a range of products, which may mean that a brand's products may not receive adequate attention.²⁴ They are also likely to request exclusive distribution access, with loyalty being an important intangible currency for commerce in Malaysian markets.

Malaysia's food retail sector is rapidly developing and is dominated by five players including Dairy Farm Group (Giant, Cold Storage, Mercato), Mydin Mohamed Holdings (Mydin), Trendcell Sdn Bhd (Jaya Grocer), Village Grocer Holdings (Village Grocer, Ben's Independent Grocer) and AEON Group (AEON, AEON Big, MaxValu Prime).²⁵ Lotus (formerly Tesco) is also significant. The remaining sector comprises convenience stores, small family-owned businesses and specialty retailers.²⁶ The premium grocery sector is becoming increasingly popular²⁷ although limited to more affluent states and localities.

E-commerce, particularly mobile e-commerce, is an extremely important, with a mobile penetration rate of 83% in 2020 and 80% of the population being active Internet users.²⁸ Groceries and online food ordering is the third most purchased e-commerce product with 5.5 million consumers worth RM979 million (US\$237M).²⁹ Major e-commerce platforms include Lazada, Shopee, PrestoMall, Lelong and HappyFresh. Many major supermarkets also offer online services³⁰ driven primarily by the shift towards online platforms due to COVID-19. By most measures, this change looks to be permanent.

LABELLING LAWS

Packaged foods in Malaysia are regulated by the Food Safety and Quality Division (FSQD) under the Ministry of Health, enforced through Food Act 1983 and Food Regulations 1985 which incorporate any new amendments.³¹

Imported food can be labelled in Bahasa Malaysia or English and must contain the following:³²

Element	Detail
Name of product	Specific name of food or description of food containing common name of its principal ingredients.
Ingredients	Listed in descending order of proportion by weight. Must declare type of edible fat or oil e.g. vegetable oil (canola). Must declare food additives in statement e.g. "contains permitted [food additive]". Allergens must be declared including: cereals containing gluten, nuts, fish, milk, egg and all their products. Additional labelling regulations apply to products containing beef, pork or alcohol.
Net content	Minimum net weight or volume.
Name and address	Imported products must declare country of origin, and name and business address of the manufacturer and importer in Malaysia.
Date of marking	Expressed in day, month and year or month and year. Includes expiry dates e.g. 'USE BY' or date of minimum durability e.g. 'BEST BEFORE'.
Storage direction	Must declare any storage conditions related to maintaining shelf life.
Nutrition labelling	Expressed per 100g/mL and per serving. Includes: amount of energy (kcal, KJ or both) and protein, carbohydrate and fat (g).

When a claim is made about fat, amounts of saturated, monounsaturated, polyunsaturated and trans fatty acid must be declared. Nutrients can be listed if they are included in Nutrient Reference Values (NRV) and expressed in metric units. Must declare amount of nutrients subject to a nutrition claim.

Special content	<p>Modern biotechnology: must be declared if proportion of genetically engineered content is more than 3% e.g. "genetically modified (name of ingredient)".</p> <p>Irradiated food: must be declared e.g. "IRRADIATED" with international food irradiation symbol.</p>
------------------------	--

Additional regulatory information:

- No claims can be made on the absence of beef, pork, lard or their derivatives.

TARIFFS

The tariff code for protein concentrates for both Australian and New Zealand exports is 2106.10.

Australian exporters enjoy tariff-free access under Malaysia-Australia Free Trade Agreement (MAFTA). Similarly, New Zealander exporters have tariff-free access under Malaysia-New Zealand Free Trade Agreement (MNZFTA).

Both Australian and New Zealander exporters also have tariff-free access under ASEAN-Australia-New Zealand Free Trade Agreement (AANZFTA).

USEFUL RESOURCES

Austrade (contact page)

[Malaysia Market Profile](#)

Department of Foreign Affairs & Trade

[DFAT Free Trade Agreement Portal](#)

NZ Trade & Enterprise (contact page)

[NZTE Tariff Finder](#)

[Malaysia Market Profile \(available to registered NZTE customers\)](#)

USDA Foreign Agricultural Service

[Malaysia Exporting Resources](#)

REFERENCES

- ¹ Malay Mail staff. Tyson Foods picks Malaysia as first Asian market to launch plant-based protein products. Malay Mail. 2021 Jun 2. Available from: <https://www.malaymail.com/news/eat-drink/2021/06/02/tyson-foods-picks-malaysia-as-first-asian-market-to-launch-plant-based-prot/1979094>
- ² Lim G.Y. Next Meats jumps on plant-based trend in Japan with yakiniku and gyudon products. Food Navigator Asia. 2020 Oct 06. Available from: <https://www.foodnavigator-asia.com/Article/2020/10/06/Local-dishes-Next-Meats-jumps-on-plant-based-trend-in-Japan-with-yakiniku-and-gyudon-products#:~:text=Japanese%20start%20Dup%20Next%20Meats,t o%20the%20global%20food%20crisis.>
- ³ Neo P. Affordability and versatility: Nestle Malaysia underlines plant-based strategy with health concerns trumping sustainability...for now. Food Navigator Asia. 2021 Apr 12. Available from: <https://www.foodnavigator-asia.com/Article/2021/04/12/Affordability-and-versatility-Nestle-Malaysia-underlines-plant-based-strategy-with-health-concerns-trumping-sustainability-for-now>
- ⁴ Ipsos MORI Global Advisor Survey. An exploration into diets around the world. Ipsos. 2018 Aug. Available from: https://www.ipsos.com/sites/default/files/ct/news/documents/2018-09/an_exploration_into_diets_around_the_world.pdf
- ⁵ Asialink business. Country starter pack: Malaysia. Asialink Business. Page 8. 2016 Jul. Available from: <https://asialinkbusiness.com.au/research-resources/malaysia-country-starter-pack>
- ⁶ Ngumbang R. Exporter Guide: Malaysia. USDA Foreign Agricultural Service. 2020 Jan 16. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_Kuala%20Lumpur_Malaysia_12-31-2019
- ⁷ Ngumbang R. Exporter Guide: Malaysia. USDA Foreign Agricultural Service. 2020 Jan 16. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_Kuala%20Lumpur_Malaysia_12-31-2019
- ⁸ Neo P. Affordability and versatility: Nestle Malaysia underlines plant-based strategy with health concerns trumping sustainability...for now. Food Navigator Asia. 2021 Apr 12. Available from: <https://www.foodnavigator-asia.com/Article/2021/04/12/Affordability-and-versatility-Nestle-Malaysia-underlines-plant-based-strategy-with-health-concerns-trumping-sustainability-for-now>
- ⁹ Asialink business. Country starter pack: Malaysia. Asialink Business. Page 22, 37, 52. 2016 Jul. Available from: <https://asialinkbusiness.com.au/research-resources/malaysia-country-starter-pack>
- ¹⁰ Consumers, Health, Agriculture and Food Executive Agency (CHAFEA). The Food and Beverage Market Entry Handbook: Malaysia. 2020. European Commission. Available from: https://ec.europa.eu/chafea/agri/sites/default/files/malaysia-handbook-2020_en.pdf
- ¹¹ Department of Statistics Malaysia Official Portal Population Distribution and Basic Demographic Characteristic Report 2010 July 29. Available from: https://www.dosm.gov.my/v1/index.php?r=column/cthemByCat&cat=117&bul_id=MDMxdHJzWtK1SjFzTzNkRXYzcVZjd09&men u_id=L0pheU43NWJwRWVSZkIWdzQ4TihUUT09
- ¹² Asialink business. Country starter pack: Malaysia. Asialink Business. Page 52. 2016 Jul. Available from: <https://asialinkbusiness.com.au/research-resources/malaysia-country-starter-pack>
- ¹³ Ngumbang R. Exporter Guide: Malaysia. USDA Foreign Agricultural Service. 2020 Jan 16. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_Kuala%20Lumpur_Malaysia_12-31-2019
- ¹⁴ Asialink business. Country starter pack: Malaysia. Asialink Business. Page 53. 2016 Jul. Available from: <https://asialinkbusiness.com.au/research-resources/malaysia-country-starter-pack>
- ¹⁵ Yang H. Tyson Foods Debuts New Plant-Based Products, First Pride™ Brand in Asia Pacific. Tyson Foods. 2021 Jun 1. Available from: <https://www.tysonfoods.com/news/news-releases/2021/6/tyson-foods-debuts-new-plant-based-products-first-pridetm-brand-asia>
- ¹⁶ OmniMeat Facebook post. 2020 Sep 10. Available from: <https://m.facebook.com/OmniMeat/photos/a.2523911151174036/2815424572022691/?type=3&source=48>
- ¹⁷ Dion M., Ho S. Figuerias S. & Perez A. The Asia Alternative Protein Industry Report 2020. Green Queen Media. 31 Jan 2020. Available from: <https://www.greenqueen.com.hk/wp-content/uploads/2020/02/The-Asia-Alternative-Protein-Industry-Report-2020-New-Decade-New-Protein.pdf>
- ¹⁸ Lim M. Nestlé Malaysia Officially Opens First Plant-Based Meals Production Site in ASEAN. Nestlé Malaysia. 2021 Apr 7. Available from: <https://www.nestle.com.my/media/pressreleases/pbms-factory-launch>
- ¹⁹ Sushi Ryu Facebook post. 2019 Jul 5. Available from: <https://www.facebook.com/sushiryumy/posts/533000184109471>
- ²⁰ Village Grocer Facebook post. 2019 Dec 20. Available from: <https://www.facebook.com/myvillagegrocer/posts/drum-roll-please-village-grocer-has-a-new-plant-based-meat-alternative-its-calle/2891499090870757/>
- ²¹ Dzafri D. KFC Malaysia introduces plant-based Zero Chicken Burger, but it's neither vegan or vegetarian. Malay Mail. 2021 Feb 8. Available from: <https://www.malaymail.com/news/eat-drink/2021/02/08/kfc-malaysia-introduces-plant-based-zero-chicken-burger-but-its-neither-veg/1947982>
- ²² Asialink business. Country starter pack: Malaysia. Asialink Business. Page 22, 52. 2016 Jul. Available from: <https://asialinkbusiness.com.au/research-resources/malaysia-country-starter-pack>
- ²³ Asialink business. Country starter pack: Malaysia. Asialink Business. Page 45, 47. 2016 Jul. Available from: <https://asialinkbusiness.com.au/research-resources/malaysia-country-starter-pack>
- ²⁴ Asialink business. Country starter pack: Malaysia. Asialink Business. Page 47. 2016 Jul. Available from: <https://asialinkbusiness.com.au/research-resources/malaysia-country-starter-pack>
- ²⁵ Ngumbang R. Retail Foods: Malaysia. USDA Foreign Agricultural Service. 2019 Nov 5. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Retail%20Foods_Kuala%20Lumpur_Malaysia_06-30-2019
- ²⁶ Ngumbang R. Retail Foods: Malaysia. USDA Foreign Agricultural Service. 2019 Nov 5. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Retail%20Foods_Kuala%20Lumpur_Malaysia_06-30-2019
- ²⁷ Ngumbang R. Exporter Guide: Malaysia. USDA Foreign Agricultural Service. 2020 Jan 16. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_Kuala%20Lumpur_Malaysia_12-31-2019

²⁸ International Trade Administration. Malaysia – Country Commercial Guide: eCommerce. US Department of Commerce. 2020 Aug 19. Available from: <https://www.trade.gov/country-commercial-guides/malaysia-ecommerce>

²⁹ Austrade. E-commerce in Malaysia: A Guide for Australian Business. Austrade. 2020 May. Available from: <https://www.austrade.gov.au/ArticleDocuments/1379/E-Commerce-Malaysia-Guide-Report.pdf.aspx>

³⁰ Ngumbang R. Retail Foods: Malaysia. USDA Foreign Agricultural Service. 2019 Nov 5. Available from: <https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReport>

ByFileName?fileName=Retail%20Foods_Kuala%20Lumpur_Malaysia_06-30-2019

³¹ Ngumbang R. Food and Agricultural Import Regulations and Standards Country Report: Malaysia. USDA Foreign Agricultural Service. 2020 Jan 23. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20Country%20Report_Kuala%20Lumpur_Malaysia_12-31-2019

³² Food Safety and Quality Division. Food Regulations 1985 – English. Ministry of Health Malaysia. 2020 Aug 11. Available from: <http://fsq.moh.gov.my/v6/xs/page.php?id=72>

MARKET PROFILE: SINGAPORE



“Singapore’s meat substitute market...is projected to grow at a compound annual growth rate (CAGR) of 5.1% between 2019 and 2024.”

- GLOBALDATA

MARKET SIZE

With imports accounting for up to 90% of all food consumed in the country¹ Singapore’s interest in alternative proteins, including plant-based meat (PBM), has support from government food security policy, which aims to reduce reliance on imports and locally produce 30% of nutrition requirements by 2030.²

The ‘meat substitute market’ in Singapore is estimated to be worth US\$2.85M in 2019, with a projected compound annual growth rate of 5.1% between 2019 and 2024.³ In the wider Asia-Pacific region, the ‘meat substitute market’ was worth US\$15.3B in 2019, up 4.75% from 2018. The pandemic has accelerated that growth, with the market forecast to expand 11.6% to US\$17.1B in 2020.⁴

CONSUMER DEMAND

Singapore has a high proportion of ‘flexitarians’, with 39% of the population reducing meat consumption and a further 7% either vegetarian or vegan.⁵ Singaporeans cite health reasons as the main factor for following a plant-based diet.⁶

Buddhism is an important feature of Singapore’s cultural context, within which vegetarianism is a central tenet. Singapore has a long history of mock meat consumption, including poultry and pork replacements, reflecting a cultural format preference distinct⁷ from Western styles focused on beef replacements.

Singaporeans have relatively high disposable incomes, creating a demand for premium food products.⁸ Singapore’s food service sector is extremely important, with Singaporeans the top spenders on dining out in Asia.⁹ International players such as Beyond Meat and Impossible Foods have focused on collaborating with food service partners to introduce their products to local consumers.

Large expatriate populations have contributed to the influence of Western trends and eating habits, leading to the growth of Western restaurants and fast-food outlets.¹⁰ PBM has been successfully adapted to both local and Western cuisines in Singapore, offering familiar formats to local and expatriate communities such as dim sum and burgers. This snapshot focuses on the new generation plant-based meat products, distinct from traditional ‘mock meat’ products such as seitan.



46%







OF SINGAPOREANS
IDENTIFY AS BEING

FLEXITARIAN, VEGAN OR VEGETARIAN











PLANT-BASED MEAT BRANDS IN MARKET

Examples of major local plant-based meat brands

	Karana	PBM start-up	Offers pork-style shreds based on jackfruit, available in food service. Ready-to-eat dumplings are coming soon to retail.
	Next Gen	PBM start-up	Offers TiNDLE soy based chicken, available in food service. ¹¹
	ALTN	Brand by frozen food company Tee Yih Jia	Offers Asian and Western-style finger foods and ready-to-eat meals based on pea, soy and fungus, including gyoza, shaomai, and nuggets. Available in grocery stores. ¹²
	SuXianZi	Subsidiary of Growthwell Group	Offers frozen and chilled PBM including alternatives to prawn, abalone, lobster sticks, crab, fish fingers, BBQ meat and sausages. ¹³ Available in grocery stores.
	OKK	Subsidiary of Growthwell Group	Offers a range of plant-based seafood (prawns, squid, fish balls etc.), chicken alternatives (chunks, patties, nuggets), mutton, ham and sausages. ¹⁴ Available in grocery stores.
	SGProtein	Contract manufacturing platform for PBM	Provides technology and processing equipment to support start-ups, multinational food manufacturers and FMCG companies to allow local production of own brand products.

International brands in market

	Beyond Meat (USA)	Beyond Meat products are available in grocery stores, e-commerce and in food service since 2018. ¹⁵
	Impossible Foods (USA)	Impossible Foods products are available in grocery stores, e-commerce and in food service since 2019. ¹⁶
	Quorn (UK)	Meat-free dim sum is available via home delivery service including BBQ buns, shaomai and gyoza. ¹⁷ Frozen dim-sum is available in grocery stores and e-commerce.
	Gardein (Canada)	Fishless Fish Fillets and BBQ Chicken Wings are available in grocery stores. Fishless Fish Fillets and Crabless Crab Cakes are also available in food service (such as Green Common). ¹⁸
	Alpha Foods (USA)	Alpha Nuggets are available in food service (such as Green Common). ¹⁹
	OmniMeat (Hong Kong)	Frozen and chilled products such as strips, mince and luncheon-style meats are available in grocery stores and e-commerce. Also available in food service. ²⁰
	vEEF by Fenn Foods (Australia)	Plant-based burger patties, bacon, meatballs and mince are available in grocery stores and e-commerce. ²¹
	Fry's (South Africa)	A range of products, including plant-based sausages, burger patties, nuggets, mince and crumbed schnitzels, are available on e-commerce.

DISTRIBUTION CHANNELS

Due to its high reliance on imported food products, Singapore's market is relatively open with minimal entry barriers.²² As a result, Australian and New Zealand exporters will face high competition with other global brands. Brand marketing on market entry is critical given the level of competition. Singapore's market can also be price sensitive.²³

Most food exports to main supermarket chains go through local importers and distributors; direct imports are more likely if product lines are large in volume with rapid turnover.²⁴ Exporters may also supply to consolidators in specific countries, such as Australia, who are appointed by retailers. For small, family-owned grocery stores, distributors and intermediary wholesalers are usually used.

Major supermarket chains stock Western products. The grocery retail sector is dominated by three major companies, which are NTUC FairPrice, Dairy Farm International (which operates Cold Storage, Market Place and Giant supermarkets) and Sheng Siong Group.²⁵ Other large retailers include Giant, HAO Mart and Prime.

The remaining sector consists of small, family-owned businesses located in residential areas. This includes specialty or premium food stores to cater for higher-end or niche consumers, such as expatriates. E-commerce and online retailers are increasingly popular; the largest e-commerce platform is RedMart, which stocks a number of imported and local PBM brands already.²⁶

LABELLING LAWS

The Singapore Food Agency (SFA) regulates imported and locally produced food in Singapore and administers the Sale of Food Act.

Food importers, distributors, manufacturers, producers, packers and retailers are responsible for ensuring that their food products comply with labelling requirements.²⁷

Food labelling must be in English and contain the following five basic elements:²⁸

Element	Detail
Name or description of food	Common name of food.
Statement of ingredients	<ul style="list-style-type: none">• Ingredients listed in descending order by weight and proportion, including constituents of compound ingredients.• Exact identity or permitted generic terms of ingredients should be declared.• International Numbering System (INS) number or E number can be used for declaration of food additives.• Foods known to cause hypersensitivity must be declared through statement of ingredients, or by using a "contain" statement. This includes: cereals including gluten, crustacean, eggs, fish, peanuts, soybeans, milk, tree nuts, sulphites in concentrates of 10mg/kg or more, and all their products.• Use of disclaimers such as "may contain" due to possibility of cross contamination is not encouraged.
Net quantity of food in package	Must be in absolute values expressed in volume for liquid foods or weight for solid foods.
Name and address of local food business	Name and address of local importer, distributor or agent for imported foods.
Country of origin (for imports only)	Use of abbreviations is not recommended. If food products are packed in Singapore, they can be labelled as 'Product of Country X. Packed in Singapore.'

Additional labelling requirements which may be relevant:

Date-marking of expiry date	<ul style="list-style-type: none">• Required for listed prepacked foods including: perishable or short shelf-life products, products whose quality may deteriorate over time and products susceptible to contamination.• Storage direction must be included if specific storage conditions are necessary to keep food until its expiry date.
Nutrition labelling	<ul style="list-style-type: none">• A Nutrition Information Panel (NIP) is recommended on food products. NIP is required when a permitted nutrition or health claims are made (e.g.: protein claim).• NIP must include energy, protein, fat and carbohydrate content.• Other nutrients are required if subject to nutrition claim.• Can be declared in per 100g, or per serving accompanied by total number of servings per package and serving size.

TARIFFS

The tariff code for protein concentrates for both Australian and New Zealand exports is 2106.10.

Australian exporters enjoy tariff-free access under Singapore-Australia Free Trade Agreement (SAFTA).

Similarly, New Zealand exporters have tariff-free access under the Closer Economic Partnership (CEP) between NZ and Singapore and Transpacific Strategic Economic Partnership (P4).

Both Australian and New Zealander exporters have tariff-free access under Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and ASEAN-Australia-New Zealand Free Trade Agreement (AANZFTA).

USEFUL RESOURCES

Austrade (contact page)

[Singapore Market Profile](#)
[Austrade Food and Agribusiness to Singapore](#)

Department of Foreign Affairs & Trade

[DFAT Free Trade Agreement Portal](#)

NZ Trade & Enterprise (contact page)

[NZTE Tariff Finder](#)
[Singapore Market Profile \(available to registered NZTE customers\)](#)

USDA Foreign Agricultural Service

[Singapore Exporting Resources](#)

REFERENCES

- ¹ Singapore's Food Supply. Singapore Food Agency. N.d. Available from: <https://www.sfa.gov.sg/food-farming/singapore-food-supply/the-food-we-eat#:~:text=With%20little%20farming%20and%2C%20Singapore,13%25%20of%20all%20the%20vegetables>
- ² Our Singapore Food Story: Raising Local Production with the 30 by 30 Goal. Singapore Food Agency. Available from: <https://www.sfa.gov.sg/food-farming/sgfoodstory/grow-local>
- ³ Bühler, Givaudan aim to address nutrition challenges with plant-based food innovation center in Singapore, says GlobalData. GlobalData. 2020 Feb 14. Available from: <https://www.globaldata.com/buhler-givaudan-aim-to-address-nutrition-challenges-with-plant-based-food-innovation-center-in-singapore-says-globaldata/>
- ⁴ Lim G.Y. Next Meats jumps on plant-based trend in Japan with yakiniku and gyudon products. Food Navigator. 2020 Oct 06. Available from: <https://www.foodnavigator-asia.com/Article/2020/10/06/Local-dishes-Next-Meats-jumps-on-plant-based-trend-in-Japan-with-yakiniku-and-gyudon-products#:~:text=Japanese%20start%20Dup%20Next%20Meats,t o%20the%20global%20food%20crisis.>
- ⁵ Ho K. The future is flexitarian. YouGov. 2020 Feb 20. Available from: <https://sg.yougov.com/en-sg/news/2020/02/20/future-flexitarian/>
- ⁶ Ho K. The future is flexitarian. YouGov. 2020 Feb 20. Available from: <https://sg.yougov.com/en-sg/news/2020/02/20/future-flexitarian/>
- ⁷ Singapore Food Agency. 2020 Food Stats for SFA. Available from: <https://www.sfa.gov.sg/docs/default-source/tools-and-resources/yearly-statistics/per-capita-consumption.pdf>
- ⁸ Kwek A. Exporter Guide: Singapore. USDA Foreign Agricultural Service. 2021 Apr 8. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_Singapore_Singapore_12-31-2020
- ⁹ Kwek A. Retail Foods: Singapore. USDA Foreign Agricultural Service. 2020 Jun 24. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Retail%20Foods_Singapore_Singapore_06-30-2019
- ¹⁰ Kwek A. Exporter Guide: Singapore. USDA Foreign Agricultural Service. 2021 Apr 8. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_Singapore_Singapore_12-31-2020
- ¹¹ TiNDLE. Available from: <https://tindle.com/>
- ¹² ALTN Meat-Free Products. Tee Yih Jia Food Manufacturing. Available from: <https://tyjfood.com/Brands/Meat-free-Products>
- ¹³ SuXianZi. Available from: <http://www.suxianzi.com/usr/product.aspx>
- ¹⁴ OKK Foods. Available from: <https://okkfoods.com/products/>
- ¹⁵ Chin N.C. Like real meat, but guilt-free? Beyond Burger debuts in Singapore. Today Singapore. 2018 Aug 18. Available from: <https://www.todayonline.com/singapore/real-meat-guilt-free-beyond-burger-debuts-singapore>
- ¹⁶ Williams A. Impossible Foods enters Singapore market. Food Navigator USA. 2019 Mar 8. Available from: <https://www.foodnavigator-usa.com/Article/2019/03/08/Impossible-Foods-launches-into-Singapore>
- ¹⁷ Lim G.Y. Universal Asian cuisine: Quorn outlines retail distribution plans for meat-free dim sum series in Singapore. Food Navigator Asia. 2020 Nov 11. Available from: <https://www.foodnavigator-asia.com/Article/2020/11/11/Universal-Asian-cuisine-Quorn-outlines-retail-distribution-plans-for-meat-free-dim-sum-series-in-Singapore>
- ¹⁸ Green Common. Available from: <https://www.greencommon.sg/menus>
- ¹⁹ Green Common. Available from: <https://www.greencommon.sg/menus>
- ²⁰ Empress. Available from: <http://empress.com.sg/wp/wp-content/uploads/2020/06/Set-Lunch.pdf>
- ²¹ Available from: <https://www.ryansgrocery.com/>
- ²² Austrade. Food and agribusiness to Singapore. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/singapore/industries/food-and-agribusiness-to-singapore>
- ²³ Kwek A. Retail Foods: Singapore. USDA Foreign Agricultural Service. 2020 Jun 24. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Retail%20Foods_Singapore_Singapore_06-30-2019
- ²⁴ Austrade. Food and agribusiness to Singapore. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/singapore/industries/food-and-agribusiness-to-singapore>
- ²⁵ Austrade. Food and agribusiness to Singapore. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/singapore/industries/food-and-agribusiness-to-singapore>
- ²⁶ Austrade. Food and agribusiness to Singapore. Austrade. N.d. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/singapore/industries/food-and-agribusiness-to-singapore>
- ²⁷ Labelling & Packaging Information: General Information. Singapore Food Agency. N.d. Available from: <https://www.sfa.gov.sg/food-information/labelling-packaging-information/general-information>
- ²⁸ A Guide to Food Labelling and Advertisements. Singapore Food Agency. 2010 Feb, last amended 2020 Nov. Available from: <https://www.sfa.gov.sg/docs/default-source/food-information/labelling-and-packaging-information/a-guide-to-food-labelling-and-advertisements.pdf>

MARKET PROFILE:

SOUTH KOREA



MARKET SIZE

The 'meat substitute' market in South Korea is estimated to be worth \$462.6M in 2018, growing by \$47.3M from 2013.¹

In the wider Asia-Pacific region, the 'meat substitute' market was worth US\$15.3B in 2019, up 4.75% from 2018. The pandemic has accelerated that growth, with the market forecast to expand 11.6% to US\$17.1B in 2020.²

CONSUMER DEMAND

Demand for plant-based meat (PBM) is mainly driven by younger consumers and millennials due to health, ethical and environmental concerns.³ Nearly 20% of the population (10 million people) are either vegetarian, vegan or actively trying to reduce their meat consumption.⁴

South Korea's rising income levels, after strong economic recovery following the Asian financial crisis, have created an opportunity for its population to diversify their diets and sample high-end food products and trends.⁵ At the same time, economic slowdown since the early 2010s has caused consumers to remain cautious, maintaining a demand for affordable goods.⁶ According to Euromonitor, competitive pricing is a key factor influencing the growth of the industry in South Korea, noting that currently, PBM products are often more expensive than conventional meat.⁷

Convenience is a key force shaping consumer demand due to the rise of single-person households and a culture of long working hours.⁸ This has led to

“With people’s growing concerns for eco-friendly and healthier consumption, we believe the meat alternative market will be properly developed in Korea in several years.”

- DONGWON F&B, SOUTH KOREA

to the growth of ready meals, meal kits and well-developed local delivery services.

Food safety is an important consideration for South Korean consumers due to a cultural perception of food as medicine.⁹ Such food safety concerns are evident in South Korea's 2021 ban on the imports of ruminant meat products from 36 countries with a history of mad cow disease,¹⁰ despite relying heavily on food imports in the meat sector.¹¹

The food manufacturing sector in South Korea is highly sophisticated with consumers generally favouring local products due to perceived superior quality and safety.¹²

There is growing interest in foreign products, particularly from young consumers who are increasingly exposed to foreign cultures through education and travel.¹³ Australian and New Zealand exporters face strong competition in the processed food market from other exporting countries. There is a tendency for South Korean consumers to display brand loyalty to products they feel can be trusted, potentially creating an additional challenge for new exporters.¹⁴






PLANT-BASED MEAT BRANDS IN MARKET

Examples of major local plant-based meat brands

	Zero Meat	Brand by Lotte Foods	Offers burger patties, cutlets and nuggets based on wheat protein and yeast extract. Available in grocery stores and e-commerce. ¹⁵
	Better Than Meat	Brand by start-up Viomix	Offers plant-based nuggets, cutlets, steaks and tteokgalbi (short ribs). ¹⁶ Available in grocery stores and e-commerce.
	Unlimate	Brand by PBM manufacturer Zikoo in	Offers slices, pulled-style alternatives, burger patties, mince and dumplings made from grains. ¹⁷ Available in food service (Subway, dumplings and sushi rolls in 7-Eleven ¹⁸) and grocery stores.
	Pulmuone	Major food manufacturer	Offers PBM based on soy such as tofu tenders which replicate chicken. ¹⁹ Available in e-commerce.
	Veggie Garden	Brand by convenience food manufacturer Nongshim	Offers PBM made from soybeans, peas and grains, including mince, patties and frozen Korean cuisine alternatives such as tteokgalbi (short ribs), nubiani (grilled beef) and tangsuyuk (sweet and sour pork). Available in grocery stores and e-commerce.
	Sahmyook	Plant-based food manufacturer	Offers frozen and shelf-stable PBM based on soy and wheat including bulgogi (grilled beef-style slices), nuggets, strips and burgers. Available in grocery stores and e-commerce.
	Vegefood	Plant-based food manufacturer	Offers frozen, shelf-stable and dried PBM with a focus on Korean cuisine alternatives such as jangjorim (braised beef), odeng (fish-style cakes) and samgyeopsal (pork belly). Available in grocery stores and e-commerce.
	Lotteria	Fast food chain introducing PBM	Offers a beef patty based on soy in its Miracle Burger since February 2020. ²⁰

Examples of international brands in market

	Beyond Meat (USA)	Has an exclusive partnership with Dongwon F&B to distribute its products since February 2019. ²¹ Available in grocery stores (E-mart) and e-commerce (Dongwon Mall, GMarket).
	v2food (Australia)	Partnered with Burger King to offer plant-based Whoppers since February 2021. ²² v2food is available locally through importer Epocline ²³ and FreshEasy meal kits. ²⁴
	OmniPork (Hong Kong)	Available in e-commerce (Kurly) since May 2021. ²⁵
	Alpha Foods (USA)	Available in e-commerce (Kurly).
	Sweet Earth (Switzerland)	PBM brand by Nestlé. Available in Lotteria food service through its 'Sweet Awesome Burger' since November 2020. ²⁶

DISTRIBUTION CHANNELS

South Korea has a well-established processed food market with modern distribution channels.²⁷ Most Australian businesses exporting to South Korea rely on agents or distributors. Importers have a preference to work through distributors and usually request exclusive rights to products for at least two years to build their reputation and market position.²⁸

Several types of retailers exist in South Korean distribution channels. Hypermarkets are increasingly importing directly from overseas suppliers to lower prices, including E-mart, Homeplus, Lotte Mart and Costco, however this is generally reserved for large, well-known brands with high turnover.²⁹

Supermarkets lead the retail distribution channel and tend to stock less imported food products than hypermarkets³⁰; examples are Lotte Super, GS Super, Homeplus Express and E-mart Everyday.

Department stores, such as Lotte, Shinsegae and Hyundai, may feature premium food sections and usually work with importers, which includes vendors with their own shelves in department stores.

Convenience stores may also stock some international products, such as GS25, Family Mart, CU and 7-Eleven.

Online channels are very important in South Korea due to an online penetration rate of more than 84%³¹ and smartphone penetration rate of 97%.³² This can occur through online services of existing retailers or major e-commerce platforms such as Gmarket, 11th Street and Coupang.³³ It is expected that online retailers and convenience stores will grow faster than other channels in the next 5-10 years.³⁴

LABELLING LAWS

Processed food products imported to South Korea are regulated by the Ministry of Food and Drug Safety (MFDS). It is recommended to keep in regular contact with local importers as import and labelling requirements can change frequently and without notice in South Korea.³⁵

Imported products must be accompanied with a Korean language label that should not be easily removable or cover the original label. The label must include the following:³⁶

Element	Detail
Product name	Should be identical to name declared to inspection and licensing authorities.
Product type	Type of food product according to the Standards & Specifications for Food.
Name and address of importer	Where products may be returned or exchanged in case of defects.
Name of manufacturer	For foreign manufacturers, no Korean translation is necessary.
Country of origin	If two or more countries were involved in the production of the product, the country of origin is where "substantial transformation" took place.
Shelf life or best before date	In (yy/mm/dd) format. Manufacture dates are also required for specific products including boxed lunches, hamburgers, sushi, etc.
Net weight	Weight or volume in metric measures.
Ingredient listing	Declared in descending order of weight and with percentages, including compound ingredients. Must also list food additives using full or abbreviated name, or purpose as listed in the Food Additive Code.
Nutritional labelling	Obligatory for most processed foods. ³⁷ Includes calories, sodium, carbohydrates including sugars, fats including saturated fat and trans-fat, cholesterol, protein and any nutrient which is emphasised on packaging.
Allergens	Must be declared in a separate label e.g. "This product contains wheat." Warnings of cross-contamination due to allergens of other products in

the same processing line must be indicated.

Allergen list includes: eggs, milk, buckwheat, peanuts, soybeans, wheat, mackerel, crab, shrimp, pork, peach, tomato, sulphurous acid, walnuts, chicken, beef, squid, clams (including oyster, abalone and mussels) and pine nut.

Additional regulatory information:

- Health claims are generally not allowed.
- Metric measures should be used.
- South Korea has strict testing requirements to ensure food safety. All first-time imports of processed foods will undergo precise examination in approved labs, sensory tests and random sampling inspections before gaining customs clearance. This process usually takes two weeks.³⁸
- South Korea has a list of approved food additives which may vary based on product type. If an additive is not listed, or is not specified for usage in a certain product type, it should be presumed to be prohibited.³⁹

TARIFFS

The tariff code for protein concentrates for both Australian and New Zealand exports is 2106.10.

Australian exporters enjoy tariff-free access under Korea-Australia Free Trade Agreement (KAFTA). Similarly, New Zealand exporters also have tariff-free access under the Korea-New Zealand Free Trade Agreement (KNZFTA).

USEFUL RESOURCES

Austrade (contact page)

[South Korea Market Profile](#)

[Austrade Food and Beverage to South Korea](#)

Department of Foreign Affairs & Trade

[DFAT Free Trade Agreement Portal](#)

NZ Trade & Enterprise (contact page)

[NZTE Tariff Finder](#)

[South Korea Market Profile \(available to registered NZTE customers\)](#)

USDA Foreign Agricultural Service

[South Korea Exporting Resources](#)

REFERENCES

- ¹ Jin M.J. Fake meat boom gets real in Korea as major players fight for a stake. Korea JoongAng Daily. 2019 Jun 6. Available from: https://koreajoongangdaily.joins.com/news/article/article.aspx?aid=3063974&ref=mobile&fbclid=IwAR3xuAp3BCaziulnwV_Nm1XMwBhT113WZ5NQga3t0GDA4ybXZ1d5R4r4CYs
- ² Lim G.Y. Next Meats jumps on plant-based trend in Japan with yakiniku and gyudon products. Food Navigator Asia. 2020 Oct 06. Available from: <https://www.foodnavigator-asia.com/Article/2020/10/06/Local-dishes-Next-Meats-jumps-on-plant-based-trend-in-Japan-with-yakiniku-and-gyudon-products#:~:text=Japanese%20start%20Dup%20Next%20Meats,t%20the%20global%20food%20crisis.>
- ³ Gibson J. More and More South Koreans Are Going Vegetarian. The Diplomat. 2020 Dec 31. Available from: <https://thediplomat.com/2020/12/more-and-more-south-koreans-are-going-vegetarian/>
- ⁴ Jo. H. Fake meat no more faux pas in Korea. The Korea Herald. 2020 Jun 13. Available from: <http://www.koreaherald.com/view.php?ud=20200611000901>
- ⁵ Oh S. Exporter Guide: Republic of Korea. USDA Foreign Agricultural Service. 2019 Dec 19. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_Seoul%20ATO_Korea%20-%20Republic%20of_12-31-2019
- ⁶ Consumers, Health, Agriculture and Food Executive Agency (CHAFAEA). The Food and Beverage Market Entry Handbook: South Korea. European Commission. 2019. Available from: https://ec.europa.eu/chafea/agri/sites/default/files/handbook-korea-2019_en.pdf
- ⁷ Jin M.J. Fake meat boom gets real in Korea as major players fight for a stake. Korea JoongAng Daily. 2019 Jun 6. Available from: https://koreajoongangdaily.joins.com/news/article/article.aspx?aid=3063974&ref=mobile&fbclid=IwAR3xuAp3BCaziulnwV_Nm1XMwBhT113WZ5NQga3t0GDA4ybXZ1d5R4r4CYs
- ⁸ Consumers, Health, Agriculture and Food Executive Agency (CHAFAEA). The Food and Beverage Market Entry Handbook: South Korea. European Commission. 2019. Available from: https://ec.europa.eu/chafea/agri/sites/default/files/handbook-korea-2019_en.pdf
- ⁹ Consumers, Health, Agriculture and Food Executive Agency (CHAFAEA). The Food and Beverage Market Entry Handbook: South Korea. European Commission. 2019. Available from: https://ec.europa.eu/chafea/agri/sites/default/files/handbook-korea-2019_en.pdf
- ¹⁰ Neo P. Government ban on ruminant meat imports could spell good news for local food firms. Food Navigator Asia. 2021 Mar 2. Available from: <https://www.foodnavigator-asia.com/Article/2021/03/02/South-Korea-food-safety-Government-ban-on-ruminant-meat-imports-could-spell-good-news-for-local-food-firms>
- ¹¹ Consumers, Health, Agriculture and Food Executive Agency (CHAFAEA). The Food and Beverage Market Entry Handbook: South Korea. European Commission. 2019. Available from: https://ec.europa.eu/chafea/agri/sites/default/files/handbook-korea-2019_en.pdf
- ¹² Oh S. Exporter Guide: Republic of Korea. USDA Foreign Agricultural Service. 2019 Dec 19. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_Seoul%20ATO_Korea%20-%20Republic%20of_12-31-2019
- ¹³ Consumers, Health, Agriculture and Food Executive Agency (CHAFAEA). The Food and Beverage Market Entry Handbook: South Korea. European Commission. 2019. Available from: https://ec.europa.eu/chafea/agri/sites/default/files/handbook-korea-2019_en.pdf
- ¹⁴ Consumers, Health, Agriculture and Food Executive Agency (CHAFAEA). The Food and Beverage Market Entry Handbook: South Korea. European Commission. 2019. Available from: https://ec.europa.eu/chafea/agri/sites/default/files/handbook-korea-2019_en.pdf
- ¹⁵ Jin M.J. Fake meat boom gets real in Korea as major players fight for a stake. Korea JoongAng Daily. 2019 Jun 6. Available from: <https://koreajoongangdaily.joins.com/news/article/article.aspx?aid=3063974&ref=mobile&fbclid=IwAR3xuAp3BCaziulnwV>
- ¹⁶ Viomix. Available from: <http://viomix.co.kr/mall/product.php?c=181982475>
- ¹⁷ Lee S. UNLIMEAT: Paving the Plant-based Meat Road in Korea. Good Food Institute APAC. 2020 Sep 23. Available from: <https://www.gfi-apac.org/blog/unlimeat-paving-the-plant-based-meat-road-in-korea/>
- ¹⁸ Wheeler M. Is plant-based meat a real new opportunity or is it only marketing hype? 2020 Sep 9. Food & Beverage Industry News. Available from: <https://foodmag.com.au/is-plant-based-meat-a-real-new-opportunity-or-is-it-only-a-marketing-hype/>
- ¹⁹ Pulmuone Newsroom. Pulmuone Commits to Becoming Plant-forward Food Leader and Scales Up Its Plant-based Protein and Plant-based Meat Business. Pulmuone. 2021 Mar 24. Available from: <https://www.pulmuone.co.kr/en/newsroom/viewPulmuoneNews.do?id=1069#>
- ²⁰ Jo H. Lotteria rolls out first veggie burger from burger chain in South Korea. The Korea Herald. 2020 Feb13. Available from: <http://www.koreaherald.com/view.php?ud=20200213000671>
- ²¹ Jin M.J. Fake meat boom gets real in Korea as major players fight for a stake. Korea JoongAng Daily. 2019 Jun 6. Available from: <https://koreajoongangdaily.joins.com/news/article/article.aspx?aid=3063974&ref=mobile&fbclid=IwAR3xuAp3BCaziulnwV>
- ²² Jo H. Meat analogues find way onto Korea's fast food menus. The Korea Herald. 2021 May 16. Available from: www.koreaherald.com/view.php?ud=20210516000096
- ²³ Kim D. 호주 식물성 대체육 브랜드 v2food, 국내 시장 진출. Sedaily. 2021 Jun 17. Available from: <https://www.sedaily.com/NewsView/22N06BU7V9>
- ²⁴ Meat alternatives surge for South Korea's food industry. Retail Asia. 2021 Jul 16. Available from: <https://www.retailasia.com/suppliers/more-news/meat-alternatives-surge-south-koreas-food-industry>
- ²⁵ OmniPork Korea. Available from: <https://www.facebook.com/OmniPork.KR/photos/a.121360366414829/228093192408212/>
- ²⁶ Jo H. Meat analogues find way onto Korea's fast food menus. The Korea Herald. 2021 May 16. Available from: www.koreaherald.com/view.php?ud=20210516000096
- ²⁷ Oh S. Exporter Guide: Republic of Korea. USDA Foreign Agricultural Service. 2019 Dec 19. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_Seoul%20ATO_Korea%20-%20Republic%20of_12-31-2019
- ²⁸ Austrade. Food and Beverage Market Entry Guide: Opportunities under the Korea-Australia Free Trade Agreement. Austrade. 2016 Aug. Available from:

https://www.austrade.gov.au/ArticleDocuments/1358/KAFTA%20_food_and_beverage_guide.pdf.aspx

²⁹ Austrade. Food and Beverage Market Entry Guide: Opportunities under the Korea-Australia Free Trade Agreement. Austrade. 2016 Aug. Available from: https://www.austrade.gov.au/ArticleDocuments/1358/KAFTA%20_food_and_beverage_guide.pdf.aspx

³⁰ Oh S. Exporter Guide: Republic of Korea. USDA Foreign Agricultural Service. 2019 Dec 19. Available from: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_Seoul%20ATO_Korea%20-%20Republic%20of_12-31-2019

³¹ Austrade. Food and Beverage Market Entry Guide: Opportunities under the Korea-Australia Free Trade Agreement. Austrade. 2016 Aug. Available from: https://www.austrade.gov.au/ArticleDocuments/1358/KAFTA%20_food_and_beverage_guide.pdf.aspx

³² Austrade. Food and Beverage Market Entry Guide: Opportunities under the Korea-Australia Free Trade Agreement. Austrade. 2016 Aug. Available from: https://www.austrade.gov.au/ArticleDocuments/1358/KAFTA%20_food_and_beverage_guide.pdf.aspx

³³ Austrade. Food and Beverage Market Entry Guide: Opportunities under the Korea-Australia Free Trade Agreement. Austrade. 2016 Aug. Available from: https://www.austrade.gov.au/ArticleDocuments/1358/KAFTA%20_food_and_beverage_guide.pdf.aspx

³⁴ Oh S. Exporter Guide: Republic of Korea. USDA Foreign Agricultural Service. 2019 Dec 19. Available from:

https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide_Seoul%20ATO_Korea%20-%20Republic%20of_12-31-2019

³⁵ Austrade. Food and Beverage Market Entry Guide: Opportunities under the Korea-Australia Free Trade Agreement. Austrade. 2016 Aug. Available from: https://www.austrade.gov.au/ArticleDocuments/1358/KAFTA%20_food_and_beverage_guide.pdf.aspx

³⁶ Chung S.A. & Olson P. Food and Agricultural Import Regulations and Standards Report. USDA Foreign Agricultural Service. 2019 Mar 22. Available from: https://apps.fas.usda.gov/newgainapi/api/report/downloadreportbyfilename?filename=Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20Report_Seoul_Korea%20-%20Republic%20of_3-22-2019.pdf

³⁷ Consumers, Health, Agriculture and Food Executive Agency (CHAFAEA). The Food and Beverage Market Entry Handbook: South Korea. European Commission. 2019. Available from: https://ec.europa.eu/chafea/agri/sites/default/files/handbook-korea-2019_en.pdf

³⁸ Austrade. Food and beverage to Korea. Austrade. Available from: <https://www.austrade.gov.au/australian/export/export-markets/countries/republic-of-korea/industries/food-and-beverage>

³⁹ Austrade. Food and Beverage Market Entry Guide: Opportunities under the Korea-Australia Free Trade Agreement. Austrade. 2016 Aug. Available from: https://www.austrade.gov.au/ArticleDocuments/1358/KAFTA%20_food_and_beverage_guide.pdf.aspx