

HEALTHY EATING REPORT



QUANTITATIVE RESEARCH
TOP LINE RESULTS | AUGUST 2019



Complexity made simple...

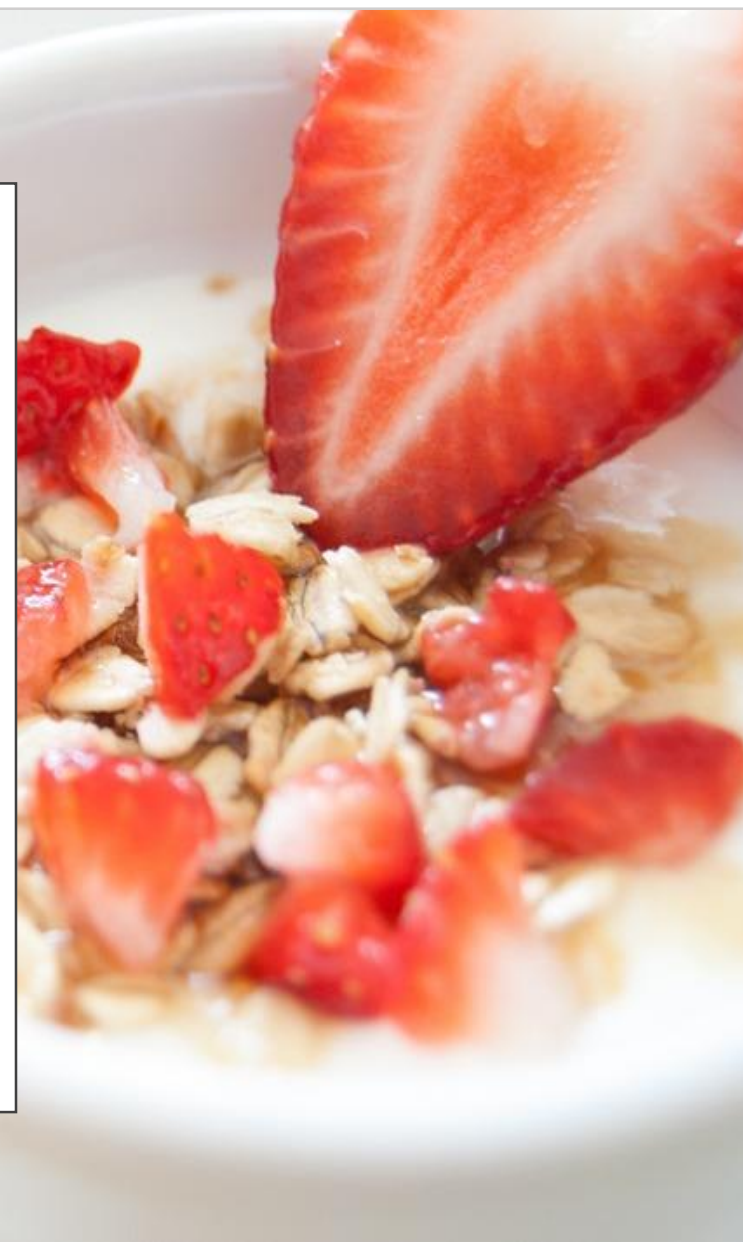
Research Background

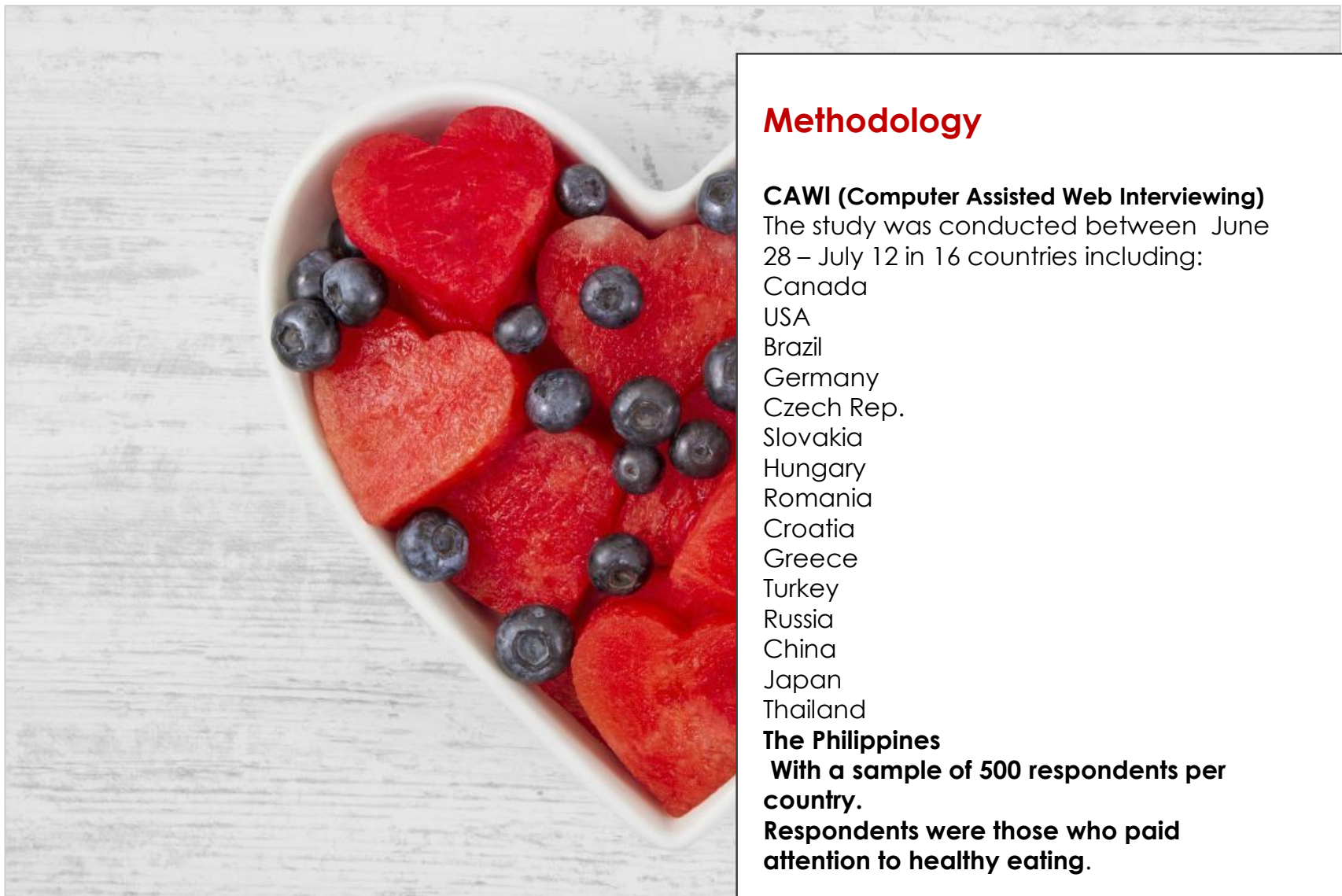
Healthy eating is increasingly gaining importance in consumers' life worldwide. After conducting an exploratory qualitative study in 9 countries, Global decided to dig deeper into the findings, understand attitudes towards healthy eating and highlight differences in consumer motives across 16 countries in 4 continents.

Research Goals

The aim of this study is to better comprehend the consumer attitudes towards healthy eating quantifying some of the findings of the qualitative research of 2018 like:

- Attitudes on habits towards healthy eating
- Healthy eating trends
- Opportunities and threats





Methodology

CAWI (Computer Assisted Web Interviewing)

The study was conducted between June 28 – July 12 in 16 countries including:

Canada
USA
Brazil
Germany
Czech Rep.
Slovakia
Hungary
Romania
Croatia
Greece
Turkey
Russia
China
Japan
Thailand

The Philippines

With a sample of 500 respondents per country.

Respondents were those who paid attention to healthy eating.

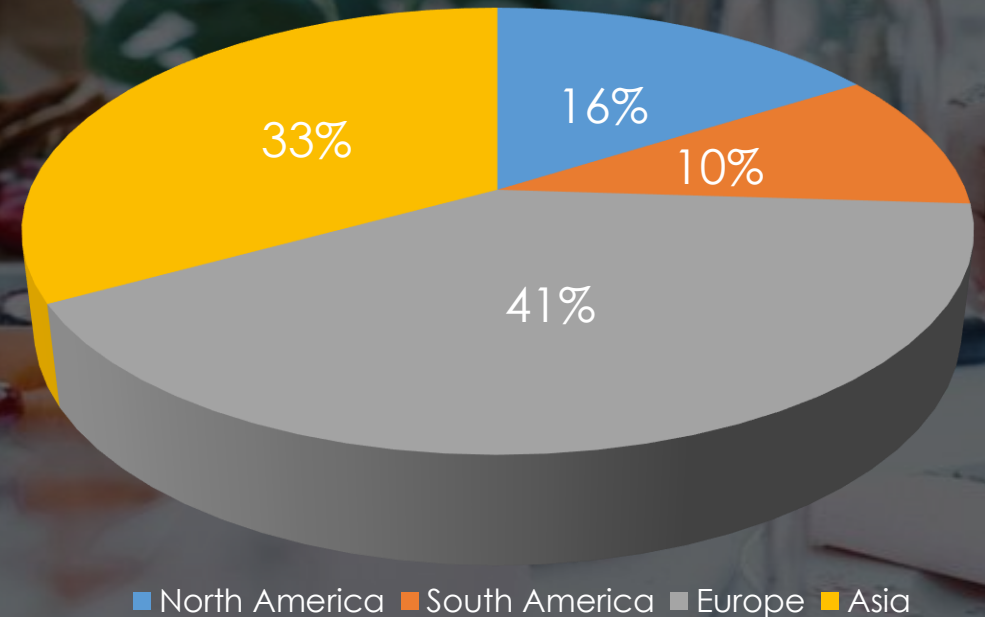
Target Group

- Aged: 18 – 65
- National representative sample
- Requirement: Healthy Eating is important to me.

REGION	COUNTRY	SAMPLE	WEIGHTING (% of the total sample)
North America	Canada	500	6.20%
	USA	501	10.20%
South America	Brazil	500	10.20%
Europe	Czech Rep	500	3.00%
	Slovakia	500	3.00%
	Germany	500	6.20%
	Hungary	500	3.00%
	Romania	520	3.00%
	Croatia	500	3.00%
	Russia	500	10.20%
	Greece	500	3.00%
	Turkey	500	6.20%
	Asia	China	500
Japan		504	10.20%
The Philippines		500	6.20%
Thailand		469	6.20%

Sample Composition

Weighted Sample



*Weighting was conducted based on the population of each country, with countries below 30 million people multiplied by 1, those between 30-100 million multiplied by 2, and those over 100 million multiplied by 3.

What did Qual Show Us

Good health is all about balance and mental health is a key component of this. Trying to eat healthily all the time is actually counter productive.

Hydration is seen as critically important to good health.

Participants are turning away from the convenience of processed foods and prepared meals and recognising that home cooked food using fresh ingredients is better for them and their families.

There is also a move away from artificial sweeteners back to healthier, more natural sugars

Few differences are perceived between the terms Bio and Organic and the term, 'Functional Food' has little or no currency/ meaning. Organic is the more widely understood term, taken broadly to mean free off chemicals and fertilisers.

When functional food is explained, participants are fine with highlighting health giving properties of foods which occur naturally, but are suspicious about foods which are 'engineered' to provide health benefits: this appears unnatural.

Overall, participants are willing to pay marginally (but not substantially) more for healthier foods (including bio and organic), but have concerns around paying for what's on the label rather than a higher quality product with more nutritional benefits.



Main Findings



CHRONIC DISEASES

(Respondents about themselves)

Stress appears to be the number one disease respondents suffer from especially in North and South America.

North America suffers heavily from depression especially compared to Europe and Asia.

The percentage of Asian respondents not suffering from any major disease is higher for Asia.

Depression: **Canada 25%**

Alcohol related issues: **China 27%**

None of the above: **Turkey 52%**

	Total	Europe	N. America	S. America	Asia
[N=]	7994	4520	1001	500	1973
Stress	25%	24%	31%	35%	20%
Hypertension / high blood pressure	17%	16%	18%	16%	17%
Gastrointestinal problems/ Digestive disorders	15%	16%	14%	17%	15%
Obesity	13%	15%	14%	16%	10%
Depression	13%	9%	27%	16%	8%
Joint problems / osteoporosis / osteoarthritis (knee, hip, other)	13%	14%	15%	13%	11%
Vitamin/mineral deficiency	12%	14%	10%	14%	12%
High cholesterol / dyslipidemia	12%	10%	14%	19%	11%
Arthritis	11%	7%	18%	6%	13%
Lung disease: Asthma, COPD (Bronchitis, Emphysema)	9%	8%	12%	11%	8%
Food intolerance(s) (e.g. lactose, gluten intolerance)	8%	6%	14%	12%	7%
Psychiatric disorders (Bipolar/anxiety/schizophrenia)	7%	4%	13%	15%	5%
Eating Disorders (e.g. anorexia, bulimia)	4%	2%	4%	4%	6%
None of the above	37%	36%	32%	28%	43%



Understanding "Healthy Eating"

Eating more fruits and vegetables and having a well balanced diet are the factors considered more as constituting healthy eating.

In Europe Eating fresh and Natural foods are considered more important than North America and Asia.

Whole grains and low sodium foods are considered more important in N. America.

Low sugar diets and avoiding fried foods are more important to S. America.

Avoiding fried food: **Czech Rep 79%**

Organic foods: **Russia 57%**

ALL RESPONDENTS

	Total	Europe	N. America	S. America	Asia
[N=]	7994	4520	1001	500	1973
Eating more fruits and vegetables	68%	70%	64%	85%	62%
Well balanced diet	66%	68%	61%	70%	65%
Eating fresh	60%	67%	58%	63%	51%
Natural foods	52%	62%	45%	54%	42%
Low sugar	52%	56%	49%	80%	40%
Eating home foods	50%	55%	45%	62%	43%
Avoiding fried food	48%	51%	49%	79%	36%
Eating high fiber foods	43%	41%	37%	71%	40%
Low fat	41%	41%	36%	63%	36%
Avoiding trans fat foods	37%	34%	37%	68%	30%
Avoid canned food	36%	38%	26%	75%	25%
Whole grains	35%	39%	41%	57%	21%
Organic foods	35%	37%	31%	39%	35%
Low sodium	33%	21%	38%	71%	33%
Low calorie foods	27%	22%	27%	30%	30%
Low carbs	26%	22%	34%	38%	23%
To avoid animal protein	10%	9%	10%	11%	12%

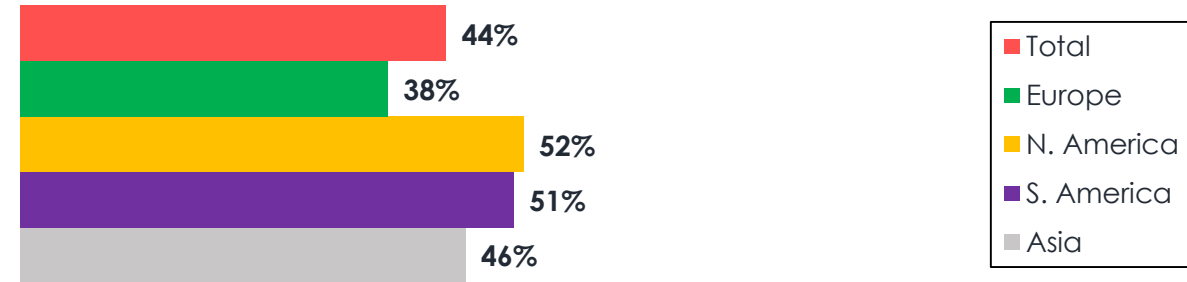


People from North and South America perceive their health as better especially compared with those in Europe.

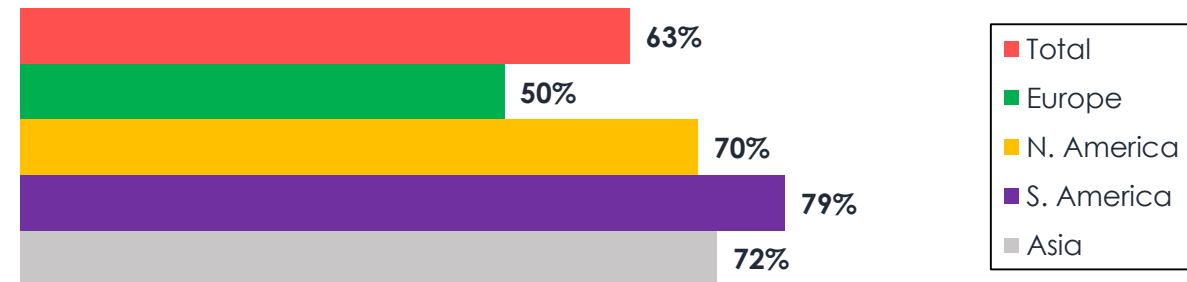
People from Asia and S. America are much more likely to perform a Medic/ Health check at least once per year than those in Europe.

People in N. America are the ones exercising more often.

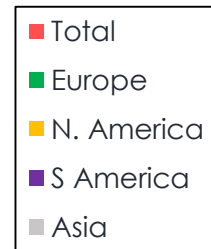
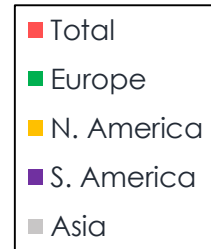
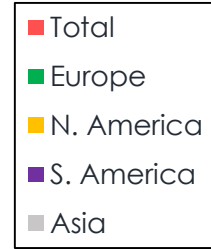
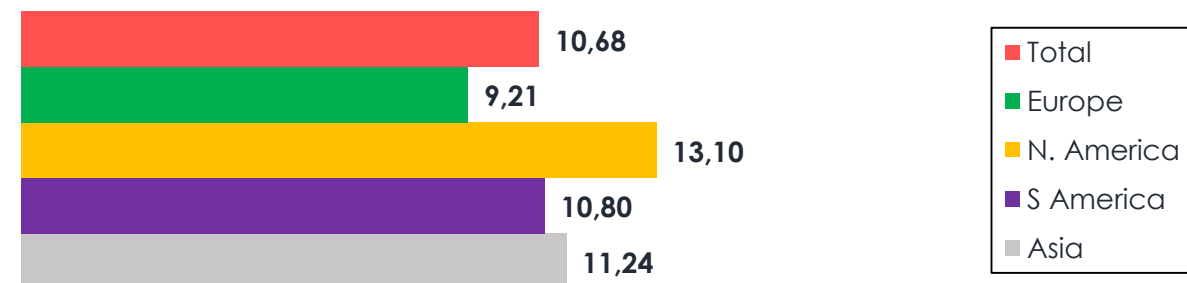
Excellent/ Very good health condition



Medic/ Health check at least once a year



Exercise frequency (times a month)



Excellent/ very good condition: **The Philippines 58%**

Exercise frequency: **China 16.22**



	Total	Europe	N. America	S. America	Asia
[N=]	3281	1574	431	197	1079
Vegetables 2: Carbohydrate 1: Meat(protein) 1	44%	38%	48%	41%	50%
Vegetables 1: Carbohydrate 2: Meat(protein) 1	31%	34%	28%	30%	30%
Vegetables 1: Carbohydrate 1: Meat(protein) 2	22%	24%	21%	21%	19%

In Asia vegetables constitute a bigger portion of one's main meal especially when compared to Europe.



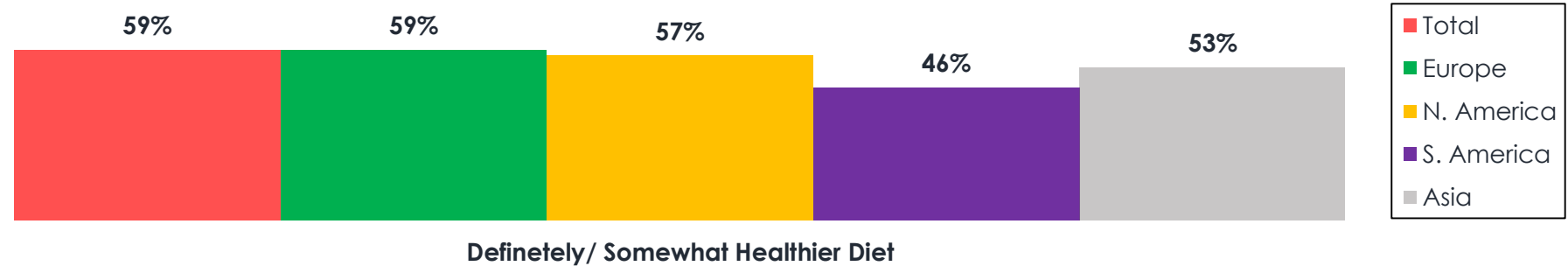
Consuming more fruits and vegetables is the most common action taken by respondents to eat healthier especially in S. America and Asia.

Actions like reducing sugar intake is not so common in N. America like it is in Europe and S. America.

In Asia reducing the intake of red meats is more common.

Reduce/ eliminated processed foods
 : **Japan 19%**

Reduce carbohydrate intake: **Hungary 59%**



	Total	Europe	N. America	S. America	Asia
[N=]	7994	4520	1001	500	1973
Consume more fruits and vegetables	67%	68%	57%	71%	69%
Reduce sugar intake	57%	64%	50%	73%	50%
Prepare more meals at home	53%	49%	52%	55%	56%
Reduce/ eliminated processed foods	43%	37%	44%	66%	42%
Consume more fish/ poultry	36%	37%	30%	38%	38%
Reduce carbohydrates intake	34%	32%	33%	43%	35%
Reduce or eliminate the intake of red meats	22%	17%	22%	17%	27%
Reduce the amount of animal protein	18%	15%	15%	11%	23%
Consume less dairy products	17%	15%	19%	24%	17%
Join a healthy food delivery service	10%	5%	11%	8%	14%



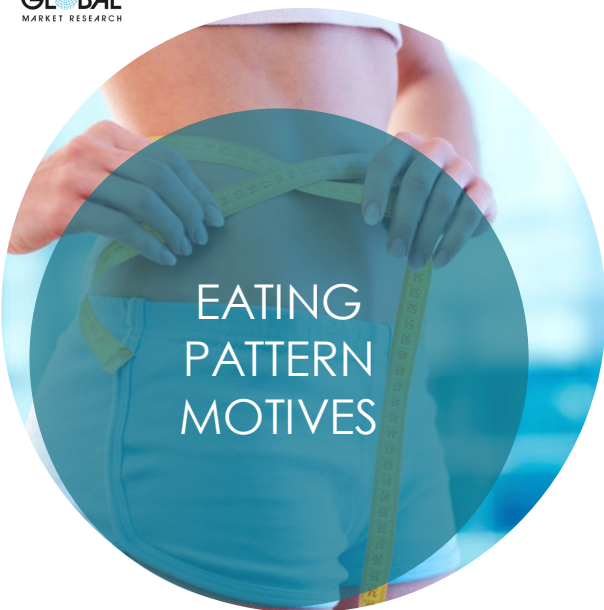
Low salt and low fat are the most popular diets especially in Asia, with Europe and N. America far behind.

Low cholesterol diet is also much more popular in Asia than in Europe.

Low fat: **Thailand 32%**

Low salt: **China 32%**

	Total	Europe	N. America	S. America	Asia
[N=]	7994	4520	1001	500	1973
Low salt	14%	10%	11%	13%	21%
Low fat	13%	10%	9%	12%	20%
Low carb	13%	9%	14%	17%	15%
Low sugar	12%	13%	11%	11%	11%
Low cholesterol	11%	6%	9%	7%	20%
Low calorie	10%	7%	8%	7%	16%
Weight loss diet	7%	5%	8%	7%	9%
High protein/ Atkins	6%	3%	7%	3%	10%
Gluten free	4%	3%	6%	2%	4%



EATING PATTERN MOTIVES

In Asia the main motivations for adapting an eating pattern/ diet have to do with improving the long term health and prevent the effects of a weight loss.

For Europe and N. America feeling better and having more energy are considered as more important.

I wanted to lose weight: **Romania 55%**

I wanted to feel better and have more energy:
Japan 11%

	Total	Europe	N. America	S. America	Asia
[N=]	3281	1574	431	197	1079
I wanted to protect my long-term health/ prevent future health conditions	52%	45%	43%	58%	60%
I wanted to feel better and have more energy	51%	50%	50%	55%	50%
I wanted to prevent weight gain I wanted to improve my health so I can have more independence in life	41%	35%	33%	44%	48%
I wanted to lose weight	39%	40%	36%	56%	36%
I noticed a change in my physical appearance	30%	25%	30%	36%	35%
I wanted to prevent any changes in my physical appearance	24%	22%	24%	14%	28%
A conversation with a friend or family member I wanted to set a good example for my friends and family	20%	12%	20%	8%	30%
A conversation with my personal health care professional I was diagnosed with a health condition	19%	20%	23%	19%	17%
A news article, blog post, or study that discussed the effects of poor eating habits	17%	11%	12%	6%	26%

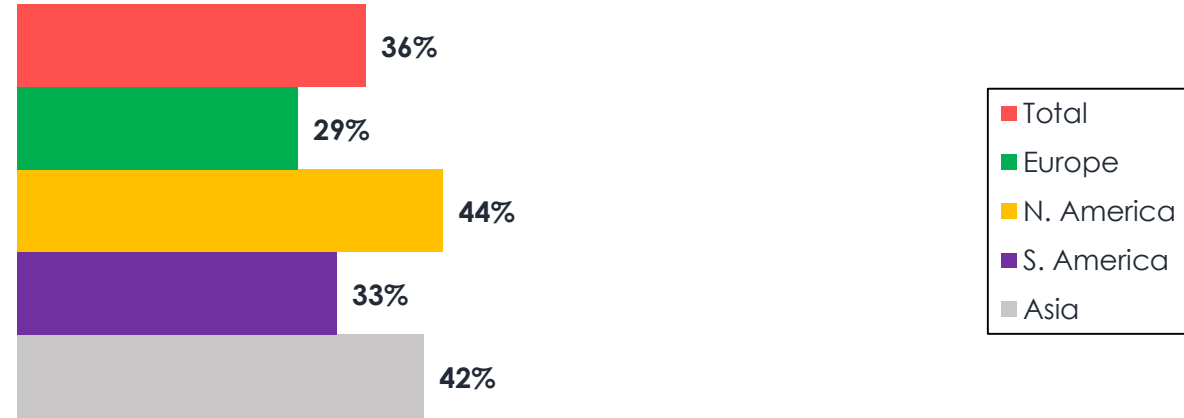


RESEARCHING
NUTRITIONAL
VALUE

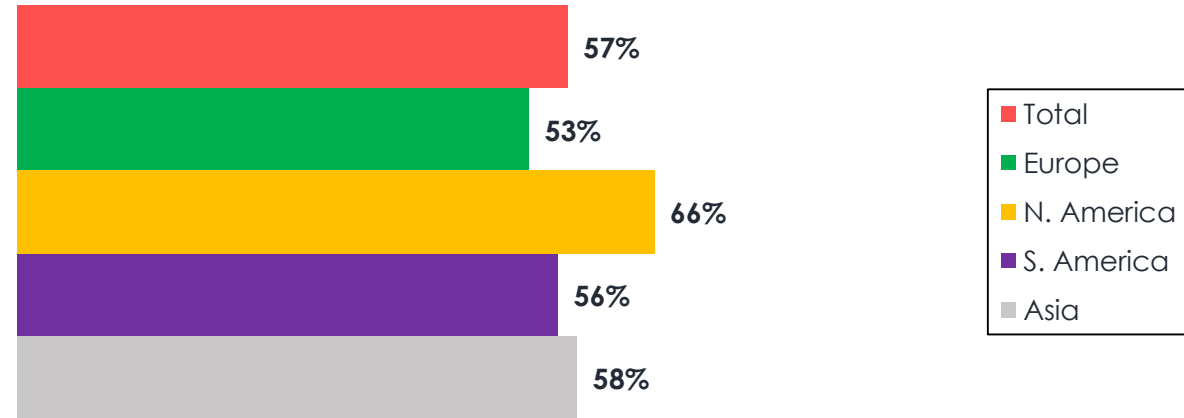
In N. America and Asia respondents are much more likely to search for the nutritional value of food especially compared to Europe and S. America.

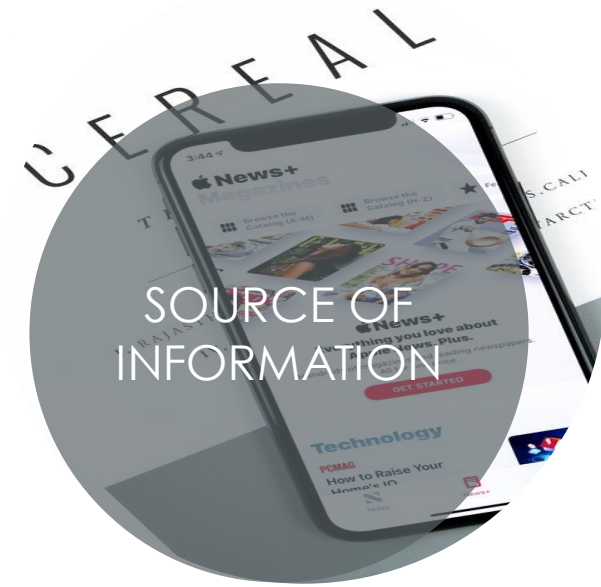
The same applies when it comes to reading nutritional facts which respondents from N. America read much more often than any other place.

I always/ often research on nutritional value



Always/often read nutritional content





The Internet is the most popular source of information especially in Europe and S. America.

In North and South America Nutritional content information in food packaging and information from Doctor/ Nutritionist are significantly higher than other regions.

A very popular source of information for healthy nutrition in Asia are TV Shows.

TV Shows : **Japan 42%**

Food sites: **Greece 39%**

Youtube: **Thailand 50%**

ALL RESPONDENTS

	Total	Europe	N. America	S. America	Asia
[N=]	7994	4520	1001	500	1973
Internet	58%	62%	46%	62%	57%
Nutritional content information on food packaging	31%	31%	34%	38%	27%
Doctor/ Nutritionist	29%	25%	33%	55%	24%
Food sites	28%	27%	29%	28%	29%
Social Media/Blogs	28%	27%	22%	30%	30%
Relatives & Friends	26%	29%	25%	24%	24%
TV Shows	24%	15%	18%	20%	40%
YouTube	23%	19%	25%	23%	26%
Cooking shows	23%	17%	22%	17%	31%
Magazines articles/ newspapers	21%	20%	20%	23%	21%
Nutritional claims on food packaging (e.g. sugar free)	21%	21%	19%	23%	21%
Cook books	18%	16%	18%	15%	21%
Sites of food manufacturers	14%	11%	13%	10%	19%
Co- workers/ colleagues	13%	12%	12%	14%	15%
Gym	9%	8%	11%	10%	9%
Schools and universities	8%	5%	9%	16%	9%
Pharmacists/ clerk	6%	7%	8%	3%	6%



Weight loss/ weight management is the most popular benefit sought from foods nutrients, especially in North and South America.

In Europe and Asia the Immune function is more important.

In Asia brain function is also significantly important.

Weight loss/management : **USA 46%**

Having more energy: **Czech Rep 42%**

Immune faction: **Croatia 41%**

	Total	Europe	N. America	S. America	Asia
[N=]	7356	4224	893	490	1749
Weight loss/ weight management	38%	35%	44%	58%	34%
Immune function	34%	40%	19%	20%	39%
Having more energy	29%	31%	41%	35%	20%
Digestive health	29%	35%	24%	18%	28%
Cardiovascular health	28%	30%	27%	27%	26%
Brain function (memory, focus, cognition)	28%	26%	26%	28%	32%
Reducing physical tiredness	23%	24%	24%	20%	23%
Emotional/ Mental health	20%	17%	22%	27%	21%
Bone health	16%	19%	13%	9%	17%
Diabetes management/ blood sugar	13%	10%	15%	20%	14%
Reducing mental tiredness	13%	11%	15%	11%	15%
Muscle health	12%	10%	13%	15%	12%
Athletic performance	11%	10%	11%	10%	12%



INGREDIENT SOUGHT FOR BETTER HEALTH

Vegetables and Fruits are by far the most common food/ nutrient sought after, especially in Europe, followed by water.

In Asia, fibre is also popular, as is milk/ dairy products and calcium.

In N. America there is a bigger trend than elsewhere towards protein.

Fruits : **Romania 63%**

Water: **Turkey 58%**

Fibre: **Slovakia 47%**

	%	Total	Europe	N. America	S. America	Asia
	[N=]	3281	1574	431	197	1079
Vegetable	49%		51%	46%	40%	49%
Fruit	46%		51%	40%	54%	38%
Water	39%		45%	40%	54%	25%
Natural foods	34%		36%	28%	43%	30%
Fibre	33%		33%	22%	40%	35%
Omega 3/ fish oils	32%		38%	31%	36%	25%
Protein	29%		24%	35%	35%	32%
Grains/ Whole grains	27%		27%	23%	38%	25%
Other vitamins and minerals	26%		25%	21%	21%	30%
Iron	24%		25%	23%	21%	23%
Calcium	20%		18%	16%	12%	28%
Milk or other dairy products	20%		18%	14%	10%	30%
Antioxidants	18%		17%	22%	26%	15%
Organic foodstuffs	16%		14%	11%	21%	19%
Probiotic- or pre biotic	16%		15%	14%	15%	19%
Foods with a low glycaemic index	13%		9%	12%	27%	14%
Folic acid	12%		13%	12%	9%	12%
Low/ No calorie sweeteners (e.g., Aspartame, Sucralose, Saccharin)	12%		8%	13%	14%	14%
Carbohydrates	11%		9%	10%	10%	15%
Sugar	6%		5%	8%	4%	6%



AVOIDING
SUGAR

The percentage of people trying to reduce/ avoid sugar in their diet is significantly lower in Asia.

The most common especially in Europe action for limiting the amount of sugar intake is replacing caloric beverages with water.

In Asia the trend of replacing or eliminating beverages or food from diet is significantly less strong.

In S. America and Europe a common action is to no longer add table sugar to foods or drinks something that is much less popular in N. America.

	%	Total	Europe	N. America	S. America	Asia
	[N=]	5789	3397	755	419	1218
Trying to avoid sugars in diet	69%		72%	75%	84%	59%

	%	Total	Europe	N. America	S. America	Asia
	[N=]	5789	3397	755	419	1218
Drinking water instead of caloric beverages	62%		66%	63%	60%	55%
No longer adding table sugar to foods and beverages	52%		56%	42%	65%	49%
Eliminating certain foods and beverages from my diet	42%		45%	42%	56%	32%
Reducing/ do not take alcoholic beverages	33%		33%	28%	29%	39%
Consume smaller portions Using the Nutrition Facts label to choose foods and beverages with less sugar Reducing the number of calories	33%		28%	32%	38%	38%
Ordering or purchasing 'sugar-free' options	29%		27%	25%	29%	34%
Reduce fruit juice intake	29%		29%	30%	17%	33%
Switching to low-or-no- calorie beverage options	28%		21%	27%	34%	36%
Using low- calorie sweeteners instead of adding sugar	24%		19%	22%	34%	30%
Reducing fruit intake	8%		5%	11%	5%	11%



PRODUCTS
ELIMINATED TO
REDUCE
SUGAR INTAKE

Candy is the most common food that is eliminated to reduce the amount of sugar intake, especially in Europe.

In Asia and N. America this trend is not as strong.

Instead in North and South America is much more common to eliminate soft drinks.

Soft drinks: **Germany 36%**

	%	Total	Europe	N. America	S. America	Asia
	[N=]	5789	3397	755	419	1218
Candy	63%		71%	57%	66%	54%
Soft drinks	55%		43%	62%	81%	56%
Baked goods (cookies, cakes, pastries, donut, croissant)	54%		59%	53%	61%	45%
Sweetened teas and coffees	49%		57%	40%	39%	48%
Packed fruit juice	48%		51%	40%	68%	39%
Energy drinks	44%		54%	37%	41%	37%
Sweet snacks (granola bars, trail mix)	44%		47%	39%	34%	47%
Juice flavoured drinks (fruit punch)	43%		44%	44%	44%	41%
Frozen desserts (ice cream, frozen yogurt)	41%		33%	39%	57%	46%
Alcohol beverage (beer, wine, cocktails, whiskey etc)	39%		43%	33%	36%	40%
Breads (bagels, dinner rolls)	33%		35%	32%	39%	28%



FACTORS
AFFECTING
FOOD/
BEVERAGE
PURCHASE

	Mean Score	Total	Europe	N. America	S. America	Asia
	[N=]	5789	3397	755	419	1218
Taste	4.3		4.2	4.4	4.6	4.2
Healthcare	4.2		4.0	4.1	4.5	4.3
Price	4.1		3.9	4.2	4.3	4.1
Kind of meal to be made	4.1		3.9	4.1	4.4	4.1
Convenience/ Place of purchase	3.9		3.7	4.0	4.2	4.0
Kind of people who will be eating	3.9		3.7	4.0	4.1	4.0
Information/ Labels on packaging	3.9		3.7	4.0	4.0	4.0
Localness/ Place of origin	3.9		3.8	3.8	3.8	4.0
Family habits	3.8		3.6	4.0	4.1	3.9
Localness/ Place of origin	3.7		3.6	3.7	3.6	3.9
Organic	3.6		3.5	3.6	3.7	3.8
Brand Name	3.5		3.3	3.5	3.8	3.6
Packaging	3.3		3.1	3.5	3.6	3.4

Taste is the number one factor affecting food and beverage purchase in most regions except Asia where Healthcare scores higher

Price is also an important factor especially in North and South America.

Price: **Croatia 1.94**

Very important = [5]
Somewhat important = [4]
Neither important nor unimportant = [3]
Somewhat unimportant = [2]
Not important at all = [1]



DECISION MAKING FACTORS

Recognising ingredients listed on the package is considered as most important especially in North and South America, followed by Knowing where the food comes from.

In Asia and North America a well known and respected brand is a much more important factor than it is in Europe.

Knowing where the food come from:

The Philippines 4.64

Very important = [5]

Somewhat important = [4]

Neither important nor unimportant = [3]

Somewhat unimportant = [2]

Not important at all = [1]

ALL RESPONDENTS

	Mean Score	Total	Europe	N. America	S. America	Asia
	[N=]	5789	3397	755	419	1218
Recognizing the ingredients listed on the package	4.1		3.9	4.2	4.3	4.2
Knowing where the food comes from	4		3.9	4.1	4.2	4.1
Being able to access information about how my food is produced	3.9		3.8	3.9	4.0	3.9
Understanding how the food is produced	3.9		3.8	4.0	4.0	4.0
The number of ingredients on the food's label	3.9		3.8	4.0	3.9	4.1
Knowing that the manufacturer has a commitment to producing food in an environmentally sustainable way	3.9		3.8	3.9	4.0	3.9
Knowing that the food was produced with animal welfare in mind	3.8		3.6	3.9	3.9	3.8
Known and respected brand	3.8		3.4	4.0	4.1	4.0
The package of the food or beverage to be recyclable	3.7		3.6	3.8	3.8	3.7
The product doesn't have excessive packaging	3.7		3.6	3.7	3.8	3.8



RESTAURANT/ CAFFETERIA CHOICE CRITERIA

Good taste of food is the most important factor for health oriented respondents when choosing a restaurant/ cafeteria followed by the kind of food eaten, and having a good experience in previous visits.

Being price convenient is much more important in S. America and Asia than Europe.

The kind of food eaten: Brazil **4.8**

Very important = [5]
Somewhat important = [4]
Neither important nor unimportant = [3]
Somewhat unimportant = [2]
Not important at all = [1]

ALL RESPONDENTS

	Mean Score	Total	Europe	N. America	S. America	Asia
	[N=]	7994	4520	1001	500	1973
Good taste of the food	4.4		4.3	4.4	4.9	4.4
The kind of food to be eaten	4.3		4.1	4.3	4.8	4.3
Good experience in previous visits	4.2		4.2	4.2	4.7	4.1
Being price convenient	4.0		3.8	4.1	4.6	4.2
Knowing where the food comes from	3.9		3.8	3.9	4.1	4.0
Understanding how the food is been produced	3.9		3.9	3.9	4.1	3.9
Knowing the food contains only natural ingredients	3.9		4.0	3.9	4.0	3.9
Proximity of house or work place	3.9		3.7	3.9	4.3	4.0
Friend or family member	3.8		3.6	3.9	4.1	3.9
Knowing that the restaurant has a commitment to environmental sustainability	3.8		3.7	3.8	3.9	3.9
Chef or culinary professional	3.6		3.5	3.5	3.6	3.7
Availability of organic options	3.6		3.5	3.5	3.6	3.8
Conversation with personal healthcare professional	3.5		3.3	3.6	3.8	3.6
Conversation with registered dietian nutritionist	3.4		3.2	3.5	3.8	3.6
A food company manufacturer	3.5		3.3	3.5	3.4	3.7
Reading a scientific study	3.4		3.1	3.4	3.4	3.6
Doctor or nutritionist on TV or social media Health- focused website	3.4		3.2	3.4	3.4	3.7



CHANNELS OF PURCHASE

In Europe respondents are much more likely to make their purchases from a supermarket especially compared to S. America

In Asia there is a wider variety of purchasing channels used, with convenience stores, natural food stores and farmers markets being significantly more popular than in other regions.

Many times a week = [8]

Once a week = [4]

Several times a month = [2]

Once a month = [1]

Less than once a month = [0.5]

Never = [0]

ALL RESPONDENTS

	Mean Score	Total	Europe	N. America	S. America	Asia
	[N=]	7994	4520	1001	500	1973
At a supermarket	5.3		5.4	5.2	4.8	5.2
At a convenience store	4.2		4.3	3.4	2.9	4.8
At a natural foods store	3.5		3.2	3.1	3.3	4.0
At a farmers' market	3.2		2.9	3.1	2.8	3.9
At a natural foods store	3.0		2.9	2.9	3.0	3.3
At a warehouse/discount club	2.9		2.9	2.8	2.5	3.0
At a drug store	2.5		2.1	2.6	1.8	3.1
From a meal kit delivery service	2.0		1.9	1.6	1.8	2.4
From an online grocery delivery/pick-up service	1.9		1.5	1.9	1.6	2.6

At a supermarket: **Russia 6.1**

At a natural foods store: **China 4.4**

From a discount store: **Japan 2.4**

CONSUMPTION
FREQUENCY

Produce

	Daily/ Weekly Consumption				
	Total	Europe	N. America	S. America	Asia
[N=]	7994	4520	1001	500	1973
Vegetables	91%	94%	92%	93%	87%
Fruits	71%	80%	66%	66%	63%

Europe consumes more vegetables especially compared to Asia.

Fruits : Hungary: 85%

Vegetables : Germany 85%

CONSUMPTION
FREQUENCY

Dairy

Cheese consumption is much higher in Europe than in N. America and Asia.

Yogurt consumption is lower in S. America especially compared to Europe.

Butter consumption is high in every region except from Asia where it is almost at 1/3 from other regions.

Plant milk on the other hand is consumed much more often in Asia.

Daily/ Weekly Consumption					
	Total	Europe	N. America	S. America	Asia
[N=]	7994	4520	1001	500	1973
Eggs	86%	89%	83%	88%	82%
Milk	75%	77%	74%	69%	75%
Cheeses	71%	82%	69%	75%	56%
Yogurt	64%	73%	60%	46%	61%
Butter	56%	71%	69%	70%	26%
Plant Milk	37%	32%	40%	26%	47%

Butter : Slovakia 84%, Japan 8%

Cheese : Thailand 48%

Plant milk : Thailand 63%

CONSUMPTION
FREQUENCY

Beverages

Tea and coffee consumption are high in Europe, especially when compared to South and North America.

S. America on the other hand has a high juice consumption.

Soda drinks on the other hand are consumed more in N. America, which together with Asia also has the highest consumption of Energy drinks.

Daily/ Weekly Consumption

	Total	Europe	N. America	S. America	Asia
[N=]	7994	4520	1001	500	1973
Bottled Water (Mineral, Still, Sparkling)	72%	75%	76%	69%	67%
Tea	64%	77%	62%	49%	53%
Coffee	62%	72%	54%	57%	55%
Juice	53%	51%	55%	74%	49%
Soda	38%	37%	48%	33%	36%
Energy drinks	18%	12%	25%	7%	24%

Coffee : Turkey 90%

Tea: Turkey 99%, Russia 91%

Soda: USA 52%



CONSUMPTION
FREQUENCY

Dry Products

Daily/ Weekly Consumption					
	Total	Europe	N. America	S. America	Asia
[N=]	7994	4520	1001	500	1973
Rice	65%	63%	62%	81%	64%
Cereals	57%	60%	68%	59%	48%
Sugar	55%	62%	58%	60%	44%
Pasta	52%	66%	61%	67%	24%
Flour	51%	57%	52%	54%	41%
Mixes	33%	29%	38%	56%	29%

Cereals: Russia 84%, USA 70%

Sugar: The Philippines 62%, Japan 6%

Pasta: Greece 84%

Sugar and pasta consumption is higher in Europe especially when compared to Asia.

Asians also consume significantly less flour than any other region.



CONSUMPTION FREQUENCY

Canned/ Jarred food

In N. America consumption of sauces is higher, especially compared to S. America and Asia.

Consumption of canned tuna is also high in North America.

Daily/ Weekly Consumption					
	Total	Europe	N. America	S. America	Asia
[N=]	7994	4520	1001	500	1973
Vegetables	66%	75%	70%	62%	55%
Fruit	63%	77%	85%	79%	28%
Sauces (Ketchup, Mayonnaise, Mustard)	43%	44%	65%	36%	33%
Spaghetti sauce	32%	28%	47%	57%	22%
Tuna/ Tuna salad	30%	28%	42%	20%	28%
Pickles	29%	37%	43%	8%	20%

Sauces (Ketchup, Mayonnaise, mustard): USA 69%

CONSUMPTION
FREQUENCY

Meat / Fish

Daily/ Weekly Consumption					
	Total	Europe	N. America	S. America	Asia
[N=]	7994	4520	1001	500	1973
Poultry	73%	76%	76%	82%	64%
Fish	65%	59%	66%	66%	73%
Pork	56%	51%	49%	38%	72%
Cold cuts (salami, sausage, etc)	55%	57%	63%	53%	50%
Beef	54%	47%	71%	79%	47%
Seafood	33%	22%	40%	19%	46%
Lamb	18%	19%	19%	9%	20%

Poultry: Hungary 86%, Croatia 86%**Beef: Brazil 79%, Hungary 18%****Fish : China: 84%**

South Americans consume the most poultry especially when compared to Asians.

Consumption of fish, seafood and pork on the other hand is higher in Asia.

Beef is consumed more in North and South America.

CONSUMPTION
FREQUENCY

Bread/ Bakery

Daily/ Weekly Consumption					
	Total	Europe	N. America	S. America	Asia
[N=]	7994	4520	1001	500	1973
Sandwich loaves	57%	50%	71%	58%	59%
Cookies	51%	45%	63%	42%	55%
Dinner rolls	41%	49%	32%	60%	31%
Tortillas	23%	19%	40%	6%	24%
Bangles	22%	25%	33%	4%	20%

Cookies : **USA 70%**

North Americans consume significantly more sandwich loaves.

The same goes for cookies with North Americans consuming almost 1/3 more cookies than Europeans.

South Americans consume almost twice as many dinner rolls as Asians.



Daily/ Weekly Consumption					
	Total	Europe	N. America	S. America	Asia
[N=]	7994	4520	1001	500	1973
Vegetables	59%	64%	72%	43%	53%
Παγωτό	38%	46%	42%	16%	32%
Individual meals	34%	28%	45%	38%	35%
Waffles	32%	24%	51%	18%	38%
Frozen fish	27%	26%	37%	18%	25%
Frozen novelties	22%	20%	31%	8%	24%
Pizza	21%	16%	40%	21%	16%

Ice cream: **Romania 55%, Brazil 16%**

Individual meals: **Germany 59%**

In total North Americans consume more frozen food products with the consumption of every frozen product being higher, especially when compared to Europe and South America.



	Mean Score	Total	Europe	N. America	S. America	Asia
	[N=]	7994	4520	1001	500	1973
Produce	18.5		20.4	18.6	19.1	15.9
Dairy products	12.1		13.2	12.3	12.8	10.3
Beverages	10.8		12.0	11.5	10.2	9.1
Dry products	8.9		8.4	9.2	12.3	8.4
Canned/ Jarred food	8.0		9.1	10.8	8.1	5.0
Meat/ Fish	7.5		6.7	8.3	7.5	8.1
Bread/ Bakery	7.0		6.9	8.5	6.5	6.5
Frozen foods	5.7		5.4	7.7	4.6	5.5

Daily = [30]

Weekly = [8]

Monthly = [3]

Never = [0]



CONSUMPTION
FREQUENCY
PER CATEGORY

Most popular healthy line products are for produce like vegetables and fruits,

Healthy lines for dairy products like milk, yogurt and eggs are also popular.

Poultry is the meat whose healthy line is most often selected.

	Mean Score	Total	Europe	N. America	S. America	Asia
	[N=]	7994	4520	1001	500	1973
Vegetables	53%		53%	51%	40%	60%
Milk	44%		41%	39%	40%	51%
Fruits	42%		45%	38%	35%	43%
Eggs	42%		42%	37%	41%	46%
Yogurt	39%		42%	38%	39%	36%
Bottled Water (Mineral, Still, Sparkling)	37%		36%	37%	30%	41%
Poultry	36%		36%	32%	40%	36%
Fish	34%		32%	28%	28%	40%
Cheese	32%		41%	28%	40%	20%
Tea	31%		33%	33%	29%	29%
Rice	31%		28%	27%	34%	37%

OUR VIEW



Stress, hypertension and gastrointestinal problems are the **most widespread conditions** that could be addressed by healthy eating.

Healthy eating is mainly perceived as:

- More fruits and vegetables
- Well balanced diet
- Eating fresh

Main **motives for healthy eating** are:

- Long term health protection
- Feeling better / more energetic

Internet is the main source of information.



The main nutrients source for **better health** are:

- Vegetables
- Fruits
- Water

There is an **overwhelming tendency to avoid sugar**, to a large extent by drinking water instead of caloric beverages.

Taste, health and price are the main **purchase determinants**. Recognizing the ingredients on pack is important.



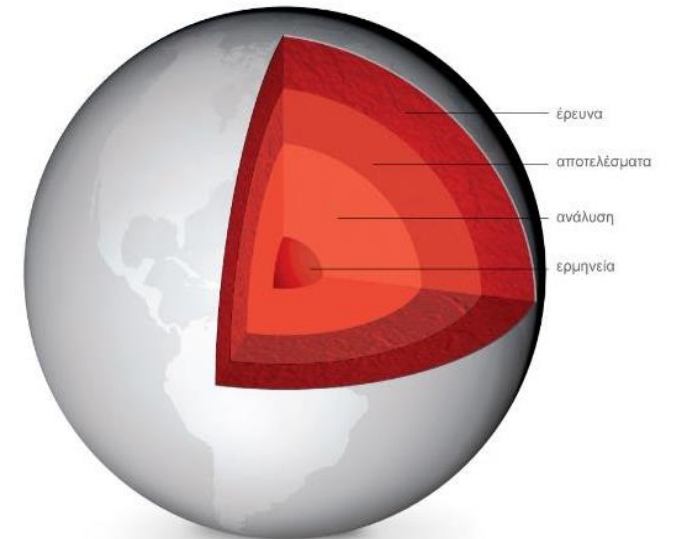
Continued education on the benefits of healthy eating is needed to ensure a further shift of attitudes.

Healthier food choices should be made more appealing and affordable.

HEALTHY EATING REPORT



QUANTITATIVE RESEARCH
TOP LINE RESULTS | AUGUST 2019



Complexity made simple...

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THANK U!