



# VEGAN LIFESTYLE IN AUSTRALIA

## KEY TRENDS AND STATISTICS



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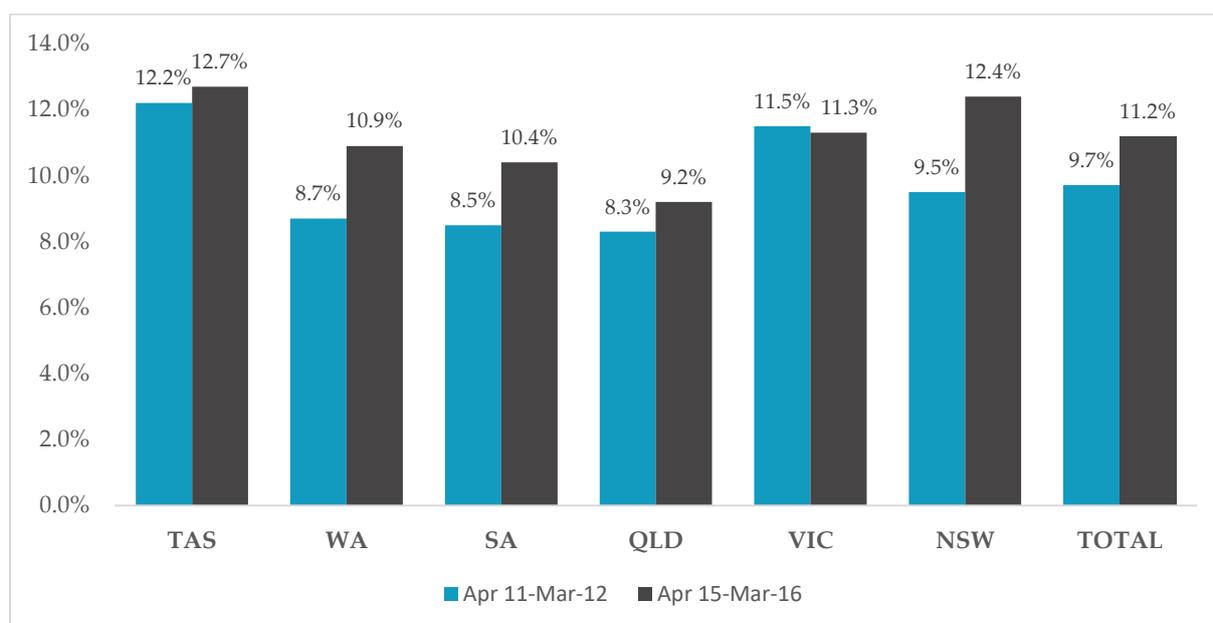
## In 2016 close to 10% of Australians were vegetarians

According to Roy Morgan Research, the number of Australians has risen from 1.7 million people in 2012 to 2.1 million in 2016, a rise from 9.7% to 11.2%. The shift has been observed nationwide, where New South Wales (NSW) has the most striking growth at almost 30%.<sup>1</sup>

In this study, as of March 2016, almost 12.4% people from NSW have been found to prefer vegetarian, which was 9.5% in 2012. Western Australia has also experienced significant growth, with 10.9% of adult Sand groppers adopting a meat-free (or meat-minimal) diet (up from 8.7% in 2012), and in South Australia (10.4%, up from 8.5%).

In Other states like Tasmania leads the nation with the highest proportion of residents who eat little or no meat 12.7%, up from 12.2%. The Queensland retains the distinction of being the state least inclined towards vegetarianism 9.2%, up from 8.3%.

Australia's Vegetarians 2012 vs. 2016<sup>2</sup>



Most of the capital cities in Australia have higher population of vegetarian (and those who eat an almost vegetarian diet) population than regional or rural areas. It's hardly surprising that Sydney is the capital with the greatest proportion of residents who eat little or no meat 14.4%, which is ahead of Hobart 13.3% and Melbourne 12.7%.\*

The above statistics are based on State and largest capital city, since Tasmania (State) is the largest among the states in Australia and Sydney (Largest Capital City) is the largest among the cities in Australia. (Hope this clarifies.)

<sup>1</sup> <http://www.sbs.com.au/topics/life/health/article/2016/08/17/more-10-australians-are-now-vegetarian>

<sup>2</sup> <http://www.roymorgan.com/findings/vegetarianisms-slow-but-steady-rise-in-australia-201608151105>

It has been found that 60.7% of Australian adults are classified as overweight or obese and 45.4% vegetarians are overweight or obese. Roy Morgan Research has also explored the reason increasing adoption of vegan meals among the Australians and found that many Australians adopt a vegetarian diet for health or weight loss reasons. In their study, nearly half, 48.7% of Aussies 18+ prefer to low fat diet foods and they also prefer to eat little or food without meat. Around 36.7% of Aussies agree that they always think of the number of calories they are consuming during meal.<sup>3</sup>

## Trends look set to continue

According to Roy Morgan Research, people are embracing a less meat heavy diet for health, environmental or animal-welfare reasons, the fact remains that this trend looks set to continue. The number of vegetarians in Australia is growing and almost 9.9 million Australian adults (53.4%) has agreed that they are eating less red meat during meal.

Australians whose diet is largely or completely vegetarian are 20% more likely than average to spend more than \$40 per week on fruit and vegetables, 93% more likely to buy organic food whenever they can, and 14% more likely to try new types of food. 30% of people who fall within the **Fit & Fab** persona eat little or no meat. Based primarily in inner-city neighbourhoods, Fit & Fab tend to be young, sociable, sporty and always on the go. While they're not averse to some serious partying, they are also careful to balance their action-packed lifestyle with a healthy diet, which is where vegetarian food would come in.

		Population	% of Population	Household Income
<b>Fit and Fab<sup>4</sup></b>	Young singles, renting flat/unit/apartment inner city, love social and sporting activities/entertainment	78k	0.4%	\$116k

In contrast, vegetarianism is frequently a cultural choice for the segment known as **New Australians**, nearly one third of whom follow a diet free of or low in meat. Comprised largely of Indian, Chinese and other Asian immigrants living in outer suburban areas, New Australians are well educated, socially connected and in the early stages of their careers. They enjoy domestic life even grocery shopping, where they would certainly take an interest in vegetarian or vegan products on offer.

<sup>3</sup> <http://www.sbs.com.au/topics/life/health/article/2016/08/17/more-10-australians-are-now-vegetarian>

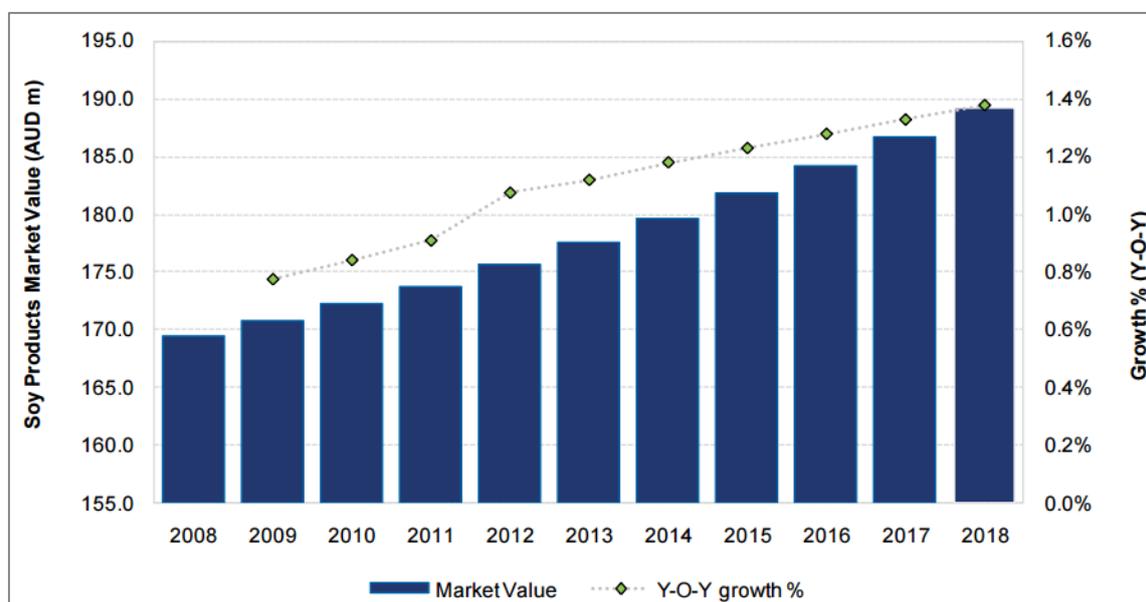
<sup>4</sup> <http://www.helixpersonas.com.au/browse/metrotech/personas/204-fit-and-fab/overview>

		Population	% of Population	Household Income
<b>New Australians<sup>5</sup></b>	Well educated, confident, inner suburb renters of flat/unit/apartment. Young parents both working and earning below/ average income	236k	1.2%	\$79k

## Meat alternative market is growing

Protein or meat alternatives are proving to be a viable market for Australian growers and manufacturers as more consumers turn to plant-based diets. The alternatives, known as meat analogues, are full of protein and are often substitutes for people who do not eat meat. About 10% of the Australian population classify themselves as vegetarian, while 17% are flexitarian, whose diet is mostly plant-based but sometimes includes meat, fish or poultry. This trend is driving the demand of soy products acting as meat alternatives. There are approximately 12 major companies and 50 smaller players on the eastern seaboard, mainly Melbourne and Sydney, manufacturing a range of soy curd products.<sup>6</sup>

**Australia Soy Products Market Value and Growth (2008-2018)<sup>7</sup>**

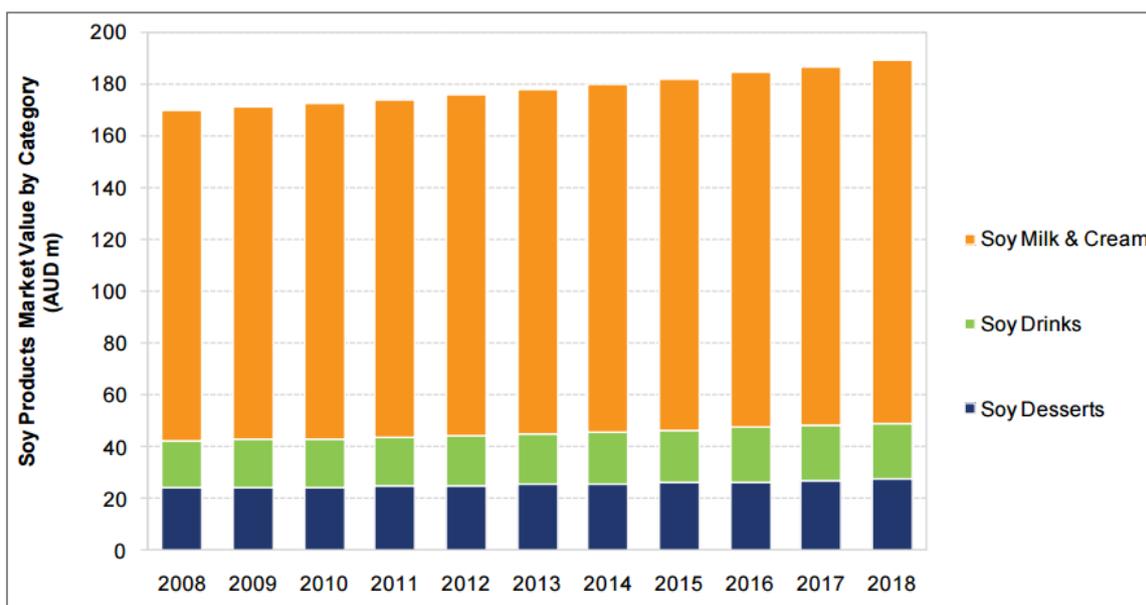


<sup>5</sup> <http://www.helixpersonas.com.au/browse/getting-by/personas/506-new-australians/overview>

<sup>6</sup> <http://www.abc.net.au/news/2015-08-31/meat-alternatives/6726756>

<sup>7</sup> <http://www.marketresearch.com/product/sample-8374866.pdf>

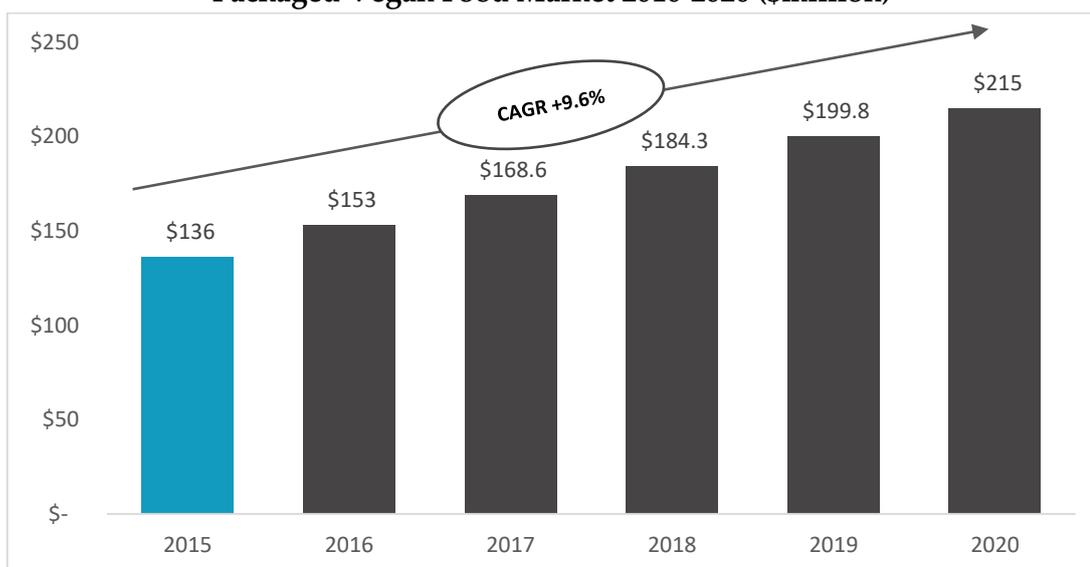
### Australian Soy Products Market Value by Category (2008-2018)



### The packaged vegan food market is also growing

The packaged food market in Australia is also developing due to increase growth in vegan food population. According to Euromonitor International, Australia's packaged vegan food market is currently worth almost \$136 million, set to reach \$215 million by 2020, at CAGR of 9.6%. Food processing or manufacturing companies are avoiding animal ingredients during production.<sup>8</sup>

Packaged Vegan Food Market 2016-2020 (\$million)<sup>9</sup>

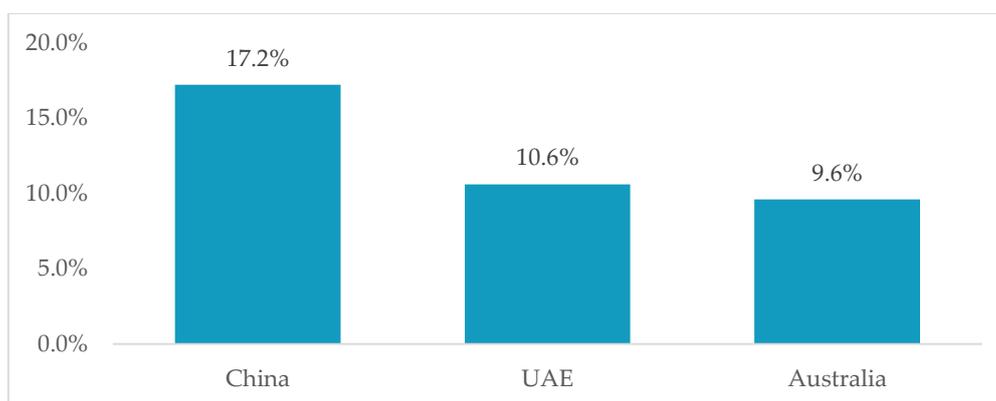


<sup>8</sup> <http://www.smh.com.au/business/consumer-affairs/australia-is-the-thirdfastest-growing-vegan-market-in-the-world-20160601-gp972u.html>

<sup>9</sup> <https://www.statista.com/statistics/559362/packaged-vegan-food-market-value-in-australia/>

Globally, the US is the leading country in the vegan food labelling market, worth \$1.75 billion, followed by Germany sitting at \$614 million and Britain at \$507 million. Australia is currently holding the fourth largest globally. In latest findings of Euromonitor International, Australia is considering the third fastest growing vegan market between 2015 and 2020, with 9.6% growth, compare to that of China, the fastest growing country in vegan segment 17.2%, followed by United Arab Emirates (UAE) 10.6%.

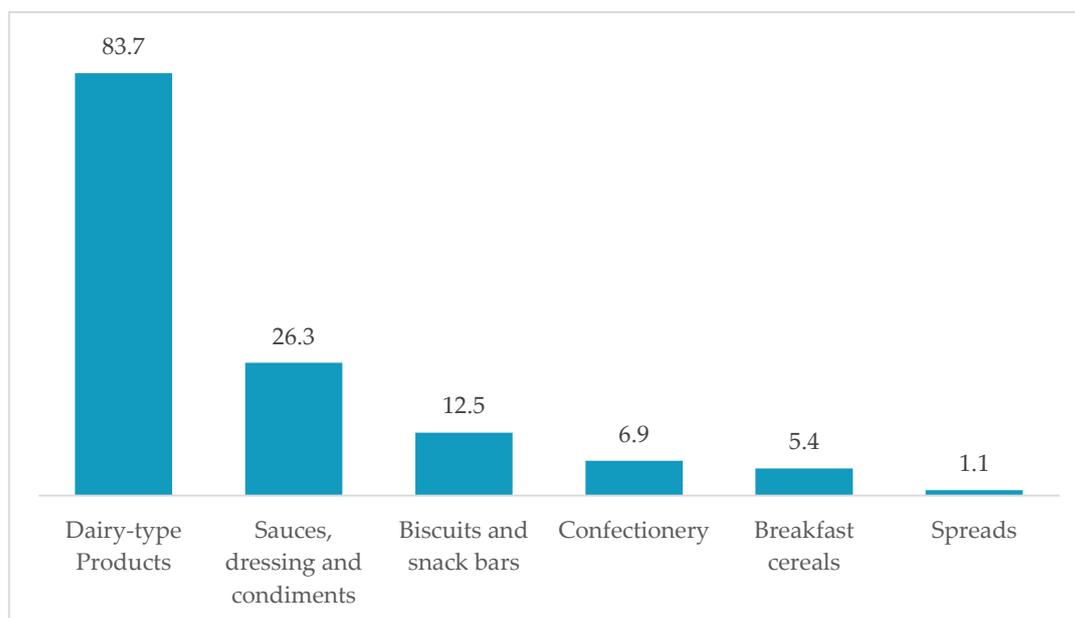
**Fastest Growing Vegan Market (2015-2020)<sup>10</sup>**



In Australia, dairy is the largest product sector in vegan segment, worth \$83.7 million, followed by sauces, dressings and condiments (\$26.3 million), biscuits and snack bars \$12.5 million, confectionary \$6.9 million, breakfast cereals \$5.4 million and spreads \$1.1 million. Alternative milk has experienced stronger growth in 2015, driven by a strong shift towards almond milk and away from grain-based milk, such as soy.

<sup>10</sup> <http://www.foodprocessing.com.au/content/business-solutions/news/australia-ranks-3rd-in-world-s-fastest-growing-vegan-markets-344154202>

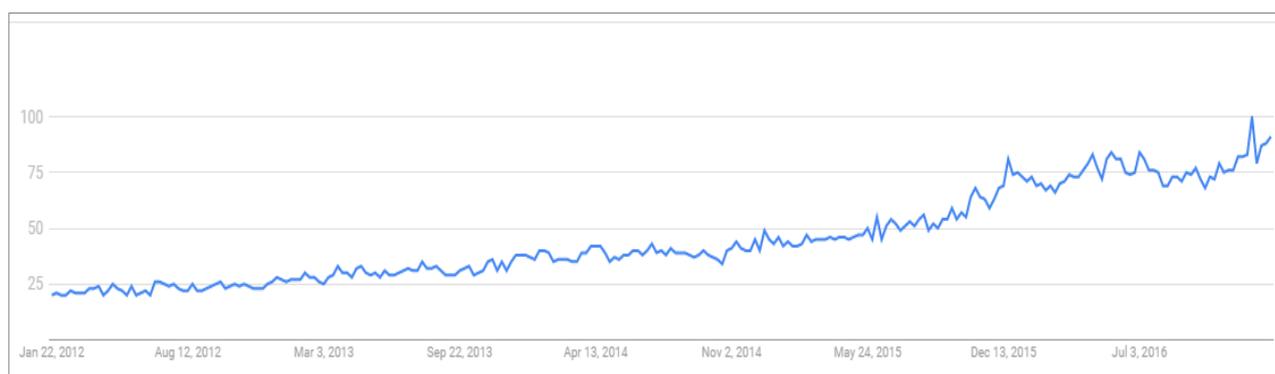
**Market value of packaged vegan food in Australia in 2015, by category  
(in million Australian dollars)<sup>11</sup>**



## Online community growth in Australia

Participation of more people is stacking up the vegan movement. Australia is experiencing significant growth in meat-free diet. People are participating into vegan movement aggressively due to concern for animal welfare, climate change and health. Australia has topped Google’s searches for the word “vegan” globally.<sup>12</sup>

**Interest over time, web search “vegan” (2012-2016)<sup>13</sup>**



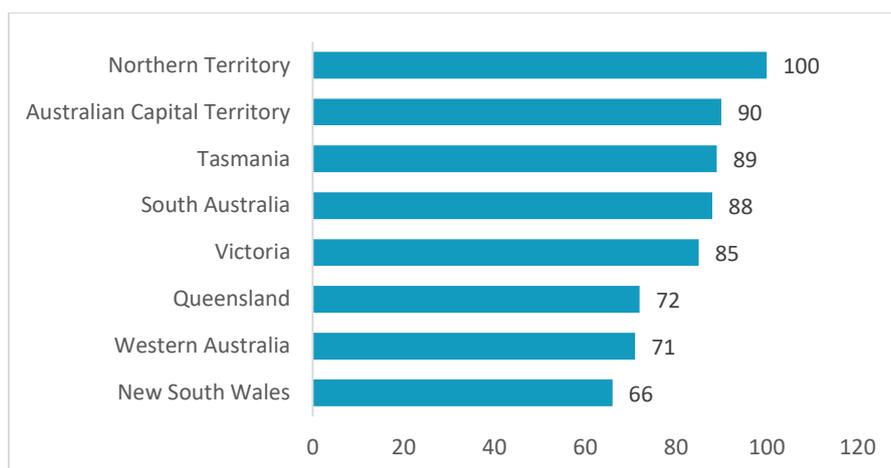
**Top regions for Australia, web search “vegan” (2015-2016)<sup>14</sup>**

<sup>11</sup> <https://www.statista.com/statistics/559424/packaged-vegan-food-market-value-in-australia-by-category/>

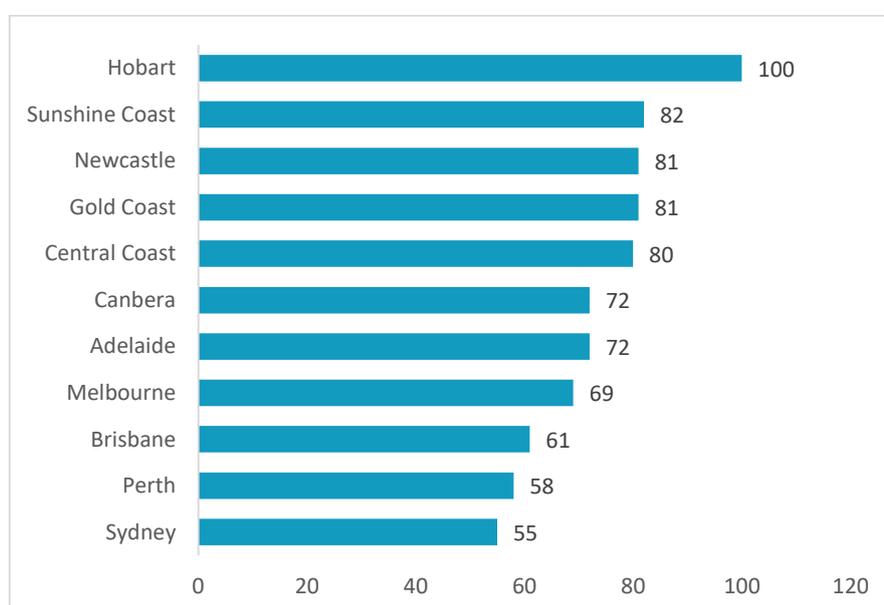
<sup>12</sup> <http://www.sbs.com.au/food/article/2016/04/13/what-australians-google-vegan-more-anyone-world>

<sup>13</sup> <https://www.google.com/trends/explore?geo=AU&q=vegan&hl=en-US>

<sup>14</sup> <https://www.google.com/trends/explore?date=today%2012-m&geo=AU&q=vegan&hl=en-US>



### Top cities for Australia, web search “vegan” (2015-2016)



## Vegan based studies/ health quotes by professors/ doctors

- **How Not To Die from Heart Disease:** The topics covering , lung disease, brain disease, digestive cancers, infections, diabetes, high blood pressure, liver disease, blood cancers, kidney disease, breast cancer, suicidal depression, prostate cancer, Parkinson's disease and Iatrogenic. We are not far from America when it comes to these diseases and soon there will be much more information available to Australians to suggest a plant-based diet is healthier long term.
  - **Overview:** Michael Greger has referenced study done by medicine pioneers as Nathan Pritikin, Dean Ornish and Caldwell Esselstyn Jr. took patients with advanced heart disease and put them on the kind of plant based diet followed by Asian and African populations who didn't suffer from heart disease. They

hoped that this plant-based change would stop the heart disease from continuing to worsen but instead, what was described as 'miraculous' happened. The patients' heart disease began to reverse and the health of the patients were improving. Their bods started to dissolve part of the plaque that had built up and the artery's were open without drugs or surgery.

- **Quote:** "To become virtually heart-attack proof, you need to get your LDL cholesterol at least under 70mg/dL" Dr Roberts, the chief of the American Journal of Cardiology noted that there are only two ways to achieve this for our population: to put more than a hundred million Americans on a lifetime of medications or to recommended that they all eat a diet centered around whole plant foods."
- **Have you got the guts to be really healthy? By Don Chisholm:** Offers the reader the truth behind why world health is still declining despite medical advances and how you can benefit from a truly unique approach to life. One of the answers lies in a very simple phrase, we are not what we eat, we are what we absorb.<sup>15</sup>

#### Few more Articles/ Reports on Vegan

Title	Source Link
<b>Trends: Vegan food so good even meat-eaters are lining up for it</b>	<a href="http://www.sbs.com.au/food/article/2015/10/22/trends-vegan-food-so-good-even-meat-eaters-are-lining-it?cid=inbody:what-australians-google-%E2%80%9Cvegan%E2%80%9D-more-than-anyone-in-the-world">http://www.sbs.com.au/food/article/2015/10/22/trends-vegan-food-so-good-even-meat-eaters-are-lining-it?cid=inbody:what-australians-google-%E2%80%9Cvegan%E2%80%9D-more-than-anyone-in-the-world</a>
<b>Are there implications for raising your child as a vegetarian, vegan or pescatarian?</b>	<a href="http://www.sbs.com.au/food/article/2016/03/17/are-there-implications-raising-your-child-vegetarian-vegan-or-pescatarian?cid=inbody:what-australians-google-%E2%80%9Cvegan%E2%80%9D-more-than-anyone-in-the-world">http://www.sbs.com.au/food/article/2016/03/17/are-there-implications-raising-your-child-vegetarian-vegan-or-pescatarian?cid=inbody:what-australians-google-%E2%80%9Cvegan%E2%80%9D-more-than-anyone-in-the-world</a>
<b>Vegan and vegetarian diets best for losing weight, new study finds</b>	<a href="http://www.sbs.com.au/news/article/2015/07/02/vegan-and-vegetarian-diets-best-losing-weight-new-study-finds">http://www.sbs.com.au/news/article/2015/07/02/vegan-and-vegetarian-diets-best-losing-weight-new-study-finds</a>
<b>Vegetarians healthy but unhappy: study</b>	<a href="http://www.sbs.com.au/news/article/2014/11/25/vegetarians-healthy-unhappy-study">http://www.sbs.com.au/news/article/2014/11/25/vegetarians-healthy-unhappy-study</a>
<b>Bad news on Aussies' diet in CSIRO study</b>	<a href="http://www.sbs.com.au/news/article/2016/09/26/bad-news-aussies-diet-csiro-study">http://www.sbs.com.au/news/article/2016/09/26/bad-news-aussies-diet-csiro-study</a>
<b>Vegetarian diets best for health and the environment, say nutritionists</b>	<a href="http://www.medicalnewstoday.com/articles/314499.php">http://www.medicalnewstoday.com/articles/314499.php</a>

<sup>15</sup> <http://haveyugottheguts.com/about-the-book/>

<p><b>High compliance with dietary recommendations in a cohort of meat eaters, fish eaters, vegetarians, and vegans: results from the European Prospective Investigation into Cancer and Nutrition-Oxford study</b></p>	<p><a href="https://www.ncbi.nlm.nih.gov/pubmed/27101764">https://www.ncbi.nlm.nih.gov/pubmed/27101764</a></p>
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