

Healthy food and beverage needs in Vietnam

2022



Introduction

As a leading independent research agency established twenty years ago, Cimigo has a dedicated consumer market research team with a deep understanding of and passion for food and beverages.

This study focuses on consumers' perceptions of health, diet, lifestyles and consumption of food and beverages. Cimigo conducted 1,233 interviews across four key cities: HCMC, Hanoi, Danang and Can Tho.

The results highlighted herein address attitudes and behaviour amongst consumers in Vietnam, helping companies identify what actions to take to better satisfy Vietnamese consumers.

We hope you find it valuable. We want to support food and beverage companies to provide a healthier nutritious diet. This report provides highlights and much more detail is available. Please do please get in touch at ask@cimigo.com, if you would like to know more.



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Key statistics

Consumer views and lifestyles

85%

are trying to improve their diet.

55%

are doing exercise regularly to live healthy and strong.

Sugar is the biggest dietary concern for consumers.

37% those taking a diet try to reduce sugar or reject food and drinks with sugar.



49% check for sugar when reading the information on pack.

Vegetables and fruits are top choices for a healthy diet.

47% those taking a diet increase a significant quantity of fruits and vegetables in daily meals.

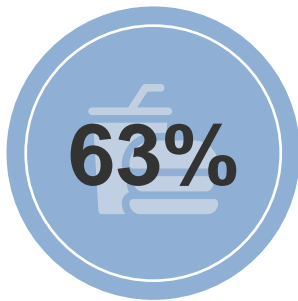


45% check for fibre when reading the information on pack.

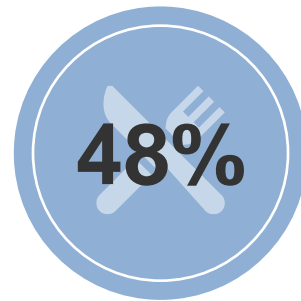
37% grow herbs or vegetables at home to ensure the fresh, high quality and to avoid pesticides.

Key statistics

Consumers trust towards manufacturers is high.



I trust food and beverage companies should provide all the products I require to follow a healthy balanced diet.

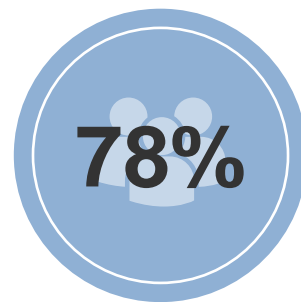


Food companies already offer enough healthy products so there is no need for any change.

Deliciousness matters when reformulating away from sugar.



Consumers are happy for the industry to reformulate as long as the products are still tasty.



Consumers are happy for the industry to reformulate to include low/non-calorie sweeteners instead of sugar.

Healthy eating and Vietnamese lifestyles

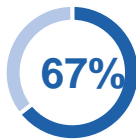


Consumers focus on healthy eating

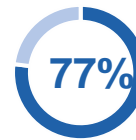
Vietnamese have a high health consciousness. More than half are following a healthy diet. 67% feel that although their diet could be healthier, it is good enough.



Stating they are following a healthy eating regime.



Believe their diets are healthy enough.



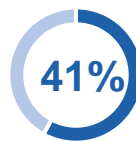
Believe they are responsible for their own diet.

Vietnamese expect improvement in physical and mental health to lower the risk of disease and live longer. Immunity, cardio health, gut health and brain health are the key benefits for food companies to deliver in their products. Consumers admit that the challenge of eating healthy comes from price. People in big cities such as HCMC (41%) and Hanoi (55%) have higher acceptance whilst those in Can Tho (64%) claim that eating healthy is too expensive to maintain as a regular habit.

Benefits of healthy eating



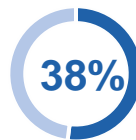
To lower risk of diseases



To improve memory and brain health



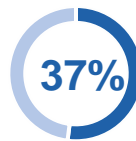
To have better mood and mental health



To live longer



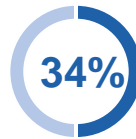
To boost immunity



To have a good night sleep



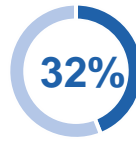
To have a good cardio health



To increase productivity and attention



To improve gut health



To strengthen strong bones and teeth

Consumers willing to pay more for organic and natural foods

5 in 10 consumers are aware of food standards and seek them out. However, knowledge of specific standards is limited and naivety is high.

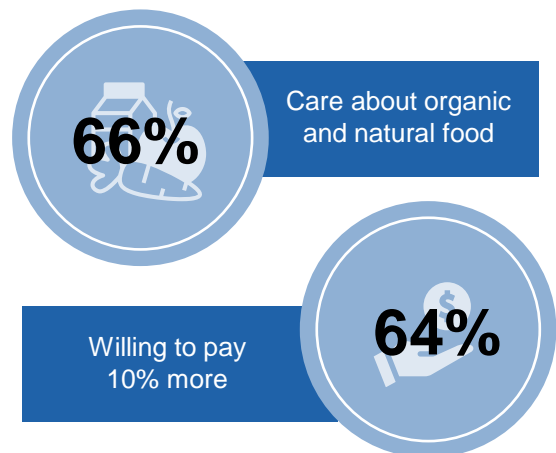
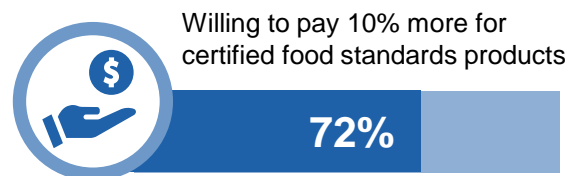
The common food standards consumers look for are Vietgap (25%), Organic (25%) and ISO (20%).

72% of those aware of standards, claim that they will pay up to 10% more for products certified by food standards.

Nearly 2 in 3 consumers claim that they are prepared to pay up to 10% more for organic and natural foods.

Imported foods from Japan (40%), the USA (32%), New Zealand (37%) and Australia (31%), are more popular for being organic and natural.

Vietnamese organic and natural products are emerging and becoming accepted by consumers (23%).



Consumers seek to control their diet to be fresh and healthy

Health consciousness is becoming more visible in how Vietnamese consumers select foods in daily life. Attention is given to more nutritional foods and changes in their cooking styles to support a healthy diet.

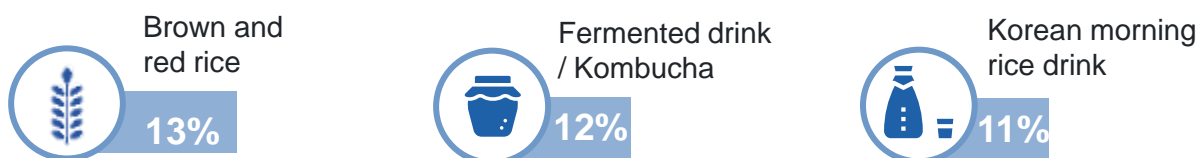
There is an emerging trend for brown or red rice which is perceived to have more nutrition and to better control cholesterol. Besides consumers' efforts to use healthy ingredients, consumers claim to have changed their cooking styles such as; reducing fried dishes (52%), adding more vegetables or fibre (47%) and reducing sugar in dishes (41%).

26% followed some form of diet in the past one year. Dietary approaches include eating more fruit and vegetables (47%), reduced snacking (43%), increased fibre (41%) and more vitamins and minerals (40%).

Beverages are not given the same level of health consciousness, as consumers seek enjoyment and pleasure from beverages. Consumers want to satisfy themselves with refreshing drinks such as coffee, soft drinks or bubble tea.

A few recent emerging trends are fermented drinks and Korean rice drinks, which are thought to have several health benefits such as reducing risks of heart disease, diabetes and cancer whilst providing a good source of vitamins.

Emerging food and beverage use in the in past one month

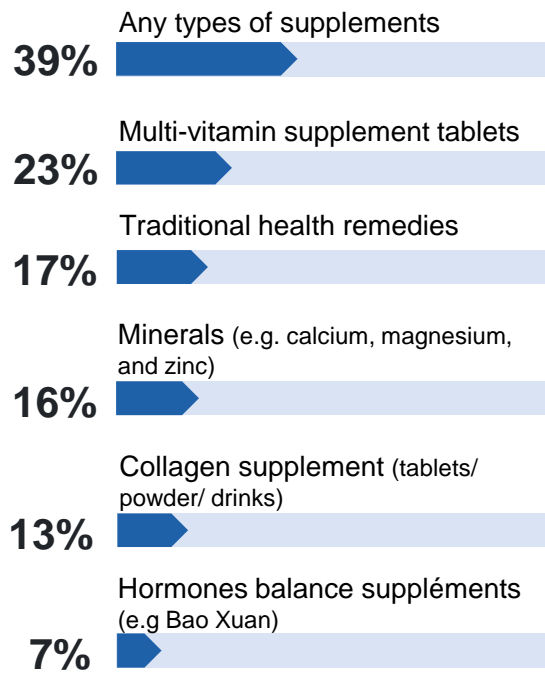


Supplements added to healthy regimes

In addition to healthy eating, consumers seek out health supplements in order to support their health and prevent long-term diseases, namely; multivitamins, traditional health remedies, minerals and collagen supplements.



Supplements use in the past one month



Consistently, consumers expect to strengthen resistance (62%), immunity (53%), support bone and joint strength (44%), digestion (40%) and brain development (38%). For females, beauty benefits are strongly anticipated to provide for anti-ageing (47%) and skin and hair support (48%).

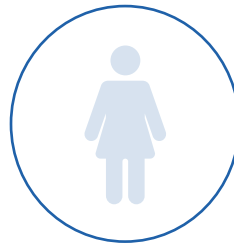
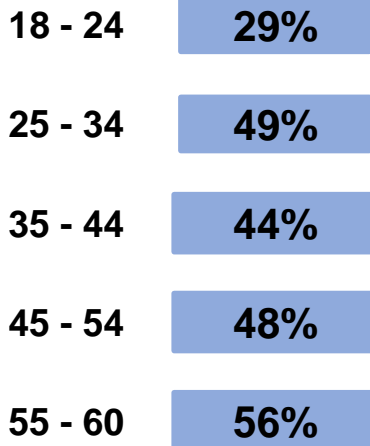
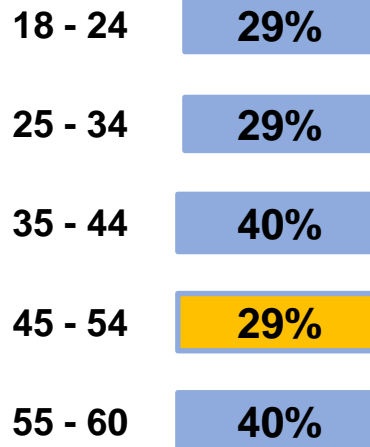
Rejuvenation trends are clear in supplement use

Supplements use is higher amongst females where choices extend beyond health to beauty enhancements. The use of supplements for rejuvenation begins from a young age and is already significant at 25 years. There is now a wide array of health supplements to match different generations and benefits.

Supplements use consumer profiles



Male

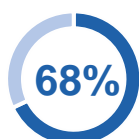


Female

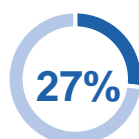
Traditional remedies remain entrenched in habits

Using traditional medicinal remedies is ingrained in Vietnamese culture. Animals and plants which are believed to have a strong impact on curing and healing specific ailments are well known to consumers. These are used in raw form or as ingredients added to wider supplements. Bird's Nest is the most well-known traditional ingredient and is often cooked on its own or mixed with other ingredients. Cordyceps, saffron and black garlic are also common. Manufacturers increasingly use traditional remedies to provide compelling proof points in their foods, beverages and supplements.

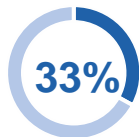
Traditional health remedies used in the past one month



Bird's nest



Spirulina



Cordyceps



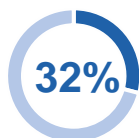
Tuber fleece flower



Saffron



Ganoderma



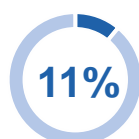
Black garlic



Medicinal alcohol



Ginseng



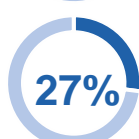
Velvet antler



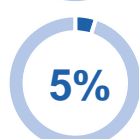
Royal jelly



Bear gall



Pickled garlic



Rhino horns

Renew labelling to fit consumers' needs



Consumers expect nutritional information on the pack

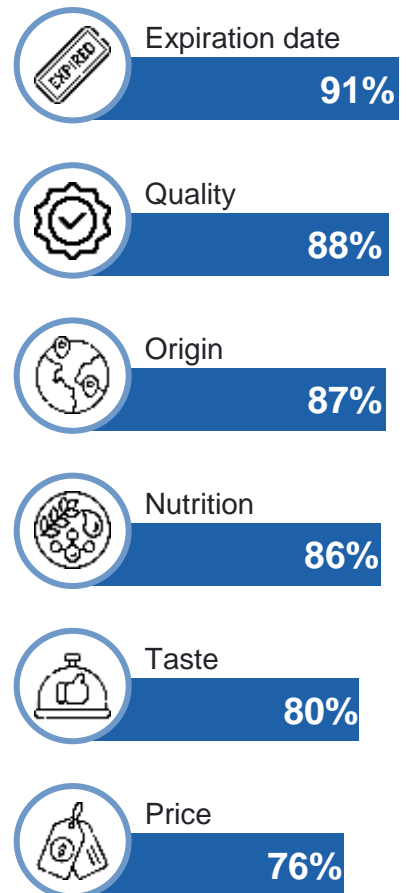
When selecting food or beverages, the expiration date, quality and origins are essential to shoppers. Nutrition plays an important role, consumers expect to see a clear display of nutritional information on the pack (81%), how natural it is (80%), ingredients added to make it healthier (78%) or ingredients removed in order to be healthier (75%).

Two-thirds of consumers have the habit to check product information regularly. 55% claim to look at the nutrition information on the pack, 41% seek a healthy icon and 25% seek an organic icon when making a purchase.

Fat and sugar content are the two biggest nutritional concerns. 51% check for fat content and 49% check for sugar content. In contrast, they also care about what ingredients are added in to make it healthier such as vitamins (66%), protein (50%), fibre (45%) and omega (33%).

Many consumers (61%) admit that they do not feel confident about the nutritional advice they come across generally (beyond packaging) because it is too often contradictory.

Expected information on nutritional label





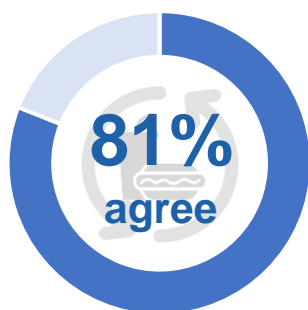
Product reformulation and consumer perspectives

Low-fat and low-sugar products are highly welcomed

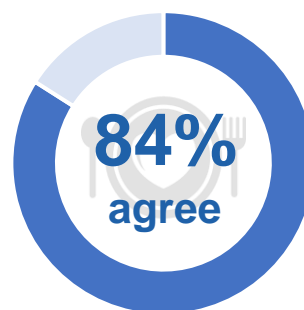
With high health consciousness and many trends towards a healthy diet, healthier product reformulation is positively welcomed by Vietnamese. Over 80% believe that reformulating products to be healthier is a necessary action for food and beverage companies. However taste is still one of the top considerations, companies not only need to make the recipe healthier but also maintain the taste and flavour profiles.

In terms of ingredients, consumers are highly receptive to sugar and fat usage reduction. 82% of consumers are happy to remove trans-fat from products and 78% prefer to replace sugar with low or non-calorie sweeteners. Besides, with wider consumption of plant-based milk products, eight out of ten claim them to be viable alternatives for traditional animal milk.

Consumer perception toward product reformulation.

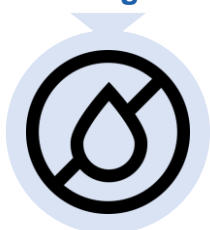


Food companies should tweak their recipes to make products healthier.



I'm happy if the product recipes are changed to make them healthier, provided they're still as tasty.

82% agree



to use trans-fats free products

78% agree



to replace with low/non-calorie sweeteners

80% agree

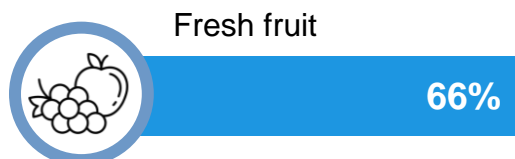
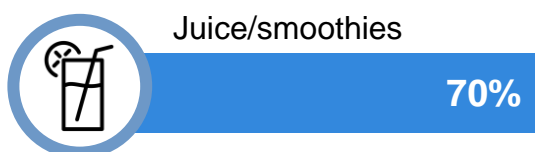
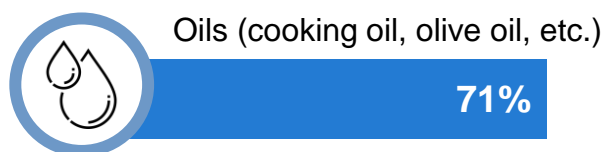


to use to plant based milk alternatives

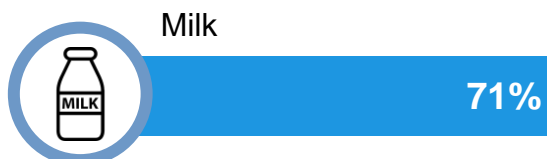
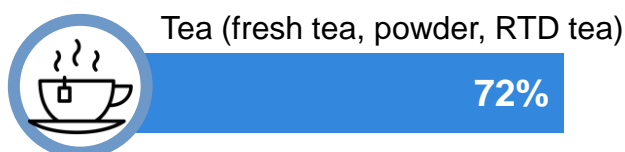
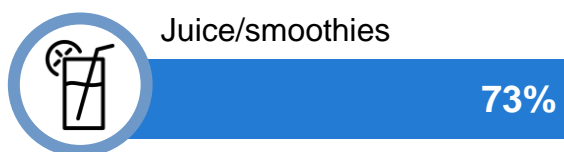
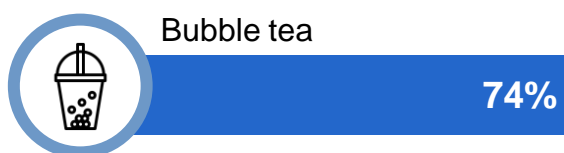
Many beverage products are expected to be healthier

With the desire to seek enjoyment and pleasure from beverages, consumers also believe that many beverages are already healthier and will continue to become healthier over the next five years to support their effort in eating healthy, with yoghurt, milk, juice and smoothies being the healthiest beverages. In addition, bubble tea has become a large part of Vietnamese consumers' lifestyles nowadays. Consumers want it to become healthier in the next five years so they can freely enjoy it without affecting their diet.

Top 5 products became healthier in past five years



Top 5 products to become healthier in next five years





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