

Prospect of Cultivated Meat & Seafood in China First Tier Cities

Understanding consumer perception and acceptance



FOREWORD

Motivated by a desire for increased food security, sustainability, bio-restoration, and zoonotic disease mitigation, the cultivated meat and seafood industry has been undertaking a transition from small-scale research & development to global commercialisation over the past decade.

To effectively bring cultivated meat and seafood to market, the Asia-Pacific Society for Cellular Agriculture (APAC-SCA) sought to understand consumers' perception and acceptance of these products for companies to produce animal meat that consumers crave without the downsides of the conventional animal agriculture system.

This research conducted in China focuses on four tier 1 cities – Beijing, Shanghai, Guangzhou, Shenzhen – will be valuable for the industry, government, and other stakeholders to assess consumers' attitudes and acceptance of cultivated meat and seafood, alongside the areas for collaboration, for the sector to reach its full potential.

Commissioned by APAC-SCA, the analysis was carried out by Professor Zhang Xi Ming, Assistant Professor in the College of Biosystems Engineering and Food Science at Zhejiang University.



Peter Yu
Program Director,
APAC Society for Cellular
Agriculture (APAC-SCA)



KEY STATISTICS

Awareness & Understanding of “Cell-cultured foods”



53%

have heard of “cell-cultured foods”
i.e., cultivated meat and seafood,
but do not know what it means



34%

have not heard of cultivated
meat and seafood



10%

understood and is aware of concept
of cultivated meat and seafood

Consumer Views

77%

of surveyed Chinese in
Tier 1 Cities are willing to try
cultivated meat and seafood



Importance

are placed on government
regulations, laws, and safety
standards by consumers



Top Three Concerns

1. Unnaturalness
2. Food Safety Concerns
3. Health Doubts



CONTENTS

- 2 Key Statistics
- 4 Meat Consumption in China
- 5 Motivators & Barriers to Consumer Acceptance
- 6 Consumer Perception of Cultivated Meat & Seafood
- 8 Key Recommendations
- 9 About APAC-SCA

MEAT CONSUMPTION IN CHINA

China accounts for nearly one-fifth of the world's population and is currently the world's largest producer, consumer, and importer of meat. In 2022, the country consumed a total of almost 103 million tonnes of meat – about one-third of the world's total. China's appetite for meat is likely to rise as increasing urbanisation and affluency make meat more available and more affordable for Chinese consumers.

Scaling up the current production of conventional meat to meet the growing demand for protein would place substantial pressure on the already strained livestock agricultural system, generating more greenhouse gas emissions while depleting scarce resources such as land and water. Feeding the world in a sustainable way requires meat to be produced differently. Cultivated meat and seafood holds the potential for a climate-resilient food future.

Cultivated Meat & Seafood Industry

Cultivated meat and seafood are genuine animal proteins grown directly from animal cells. This production method is done in isolation of the animal and replicates the sensory and nutritional profiles of its conventionally produced counterparts such as meat, poultry, aquatic products, dairy and eggs.

Motivated by a desire for increased food security, sustainability, bio-restoration, and zoonotic disease mitigation, cultivated food technology has seen rapid advancement over the past decade. There are now more than 170 companies focused on the production of cultivated food products around the world, with 7 in China.

To aid the industry's communication efforts with regulatory bodies and consumers, 36 key stakeholders across the Asia Pacific (APAC) signed a Memorandum of Understanding to align the region on the term 'cultivated' as the preferred English-language descriptor for food products grown, ex-vivo from animal cells.

While we recognise that other entities and jurisdictions have adopted different terms of preference to describe foods cultivated from animal cells (e.g. cell-based or cultured), we will utilise the term 'cultivated' throughout this document for consistency.

Current Regulatory Approvals

Cultivated meat and seafood are considered novel foods in many jurisdictions and tend to require pre-market approval. As such, regulations plays a critical role to further advance the industry and bolster nations' food security.

As of June 2025, there has been 8 regulatory approvals of cultivated products in 5 countries – Singapore, United States of America, Israel, Australia and New Zealand. These forward-facing regulatory bodies have developed clear and scientifically validated safety assessments to ensure that cultivated meat and seafood are safe for human consumption.

MOTIVATORS & BARRIERS TO CONSUMER ACCEPTANCE

The motivators and barriers to consuming cultivated meat and seafood can range widely. Factors could include price, taste, texture, food safety, health, environment and animal welfare considerations, familiarity, and naturalness of the product. Likewise, consumer characteristics such as their dietary types (i.e., flexitarian/vegetarian) and age groups could contribute to their awareness and perceived appeal of cultivated meat and seafood products.

As cultivated meat and seafood companies prepare to go to market, more evidence is needed to provide an in-depth understanding of the motivators and barriers that could influence consumers' perception and attitudes towards cultivated meat and seafood products, and therefore their likelihood of purchase.



CONSUMER PERCEPTION OF CULTIVATED MEAT & SEAFOOD

APAC-SCA conducted a survey to understand Chinese consumers' perception and attitudes towards cultivated meat and seafood in China's Tier 1 Cities of Beijing, Shanghai, Guangzhou and Shenzhen, totalling 1,000 representative samples.

Understanding of the term “cell-cultured foods” (i.e. cultivated meat and seafood) is low among the Chinese population. 10% says that they are aware of the concept of cultivated meat and seafood, while 53% of consumers claim that they have heard of it before but do not know what it means. 34% shared that they have not heard of it.

Among the 10% that noted their awareness of the concept, close to half of these respondents were able to provide an accurate technical definition.

■ **3 in 4 Chinese consumers are willing to try cultivated meat & seafood**

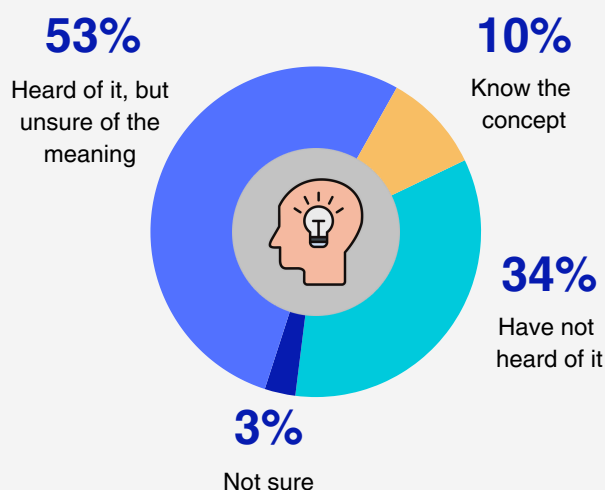
77%



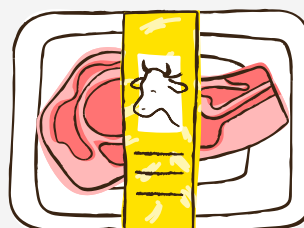
Despite a small sample that understood the concept, willingness of Chinese consumers to consume cultivated meat & seafood products are high. 77% of surveyed respondents indicated their interest to try cultivated meat and seafood, which was primarily driven by the appeal of trying new and innovative foods.

The positive attitude of Chinese consumers towards cultivated meat and seafood also carries into the possibility of replacing conventional meat and seafood with cultivated counterparts. 45% of respondents noted that they are likely to do so.

■ **Little understanding around the concept of “cell-cultured foods”**



■ **I am likely to choose cultivated meat & seafood over conventional meat & seafood**



45%

There are many reasons that could influence Chinese consumers' interest to consume cultivated meat and seafood.

Factors such as unnaturalness, food safety concerns, and health doubts were overwhelming chosen by the respondents who noted their reluctance to consume cultivated meat and seafood. On the other hand, food safety was selected as the top motivator by consumers that could encourage consumption of cultivated meat and seafood.

Chinese respondents also place great importance on the involvement of local government laws, regulations, and safety standards, sharing that these would shape the perceptions and attitudes of Chinese consumers toward cultivated meat and seafood products.

Thus, to overcome the barriers leading to consumers' reluctance and to encourage consumers' acceptance, unified messages on the safety and benefits of cultivated meat and seafood from regulators and industry can raise consumer confidence and trust in these products.



KEY RECOMMENDATIONS

Regulators Perspective

Creation of clear guidances from close collaboration with the cultivated meat & seafood industry and fellow regional regulators can ensure a consistent assessment approach suitable for the Chinese population.

International discussion at the Codex Alimentarius level could inform and align regulators on the risk assessment frameworks suitable to evaluate cultivated meat & seafood products.

Industry Perspective

A clear pathway for communication and engagements with regulatory stakeholders, including tools such as virtual clinics or sandboxes, can provide clarity for the industry as they seek to commercialise their products.

Tasting sessions on pre-approved products are crucial for the industry to understand how their products will be perceived by the general public and for adjustments on taste & texture.

Consumers Perspective

Unified messages from the industry and local government to assure food safety and to convey its benefits towards food security can raise consumers' confidence and trust in cultivated meat & seafood products.

Communication channels with informative and engaging materials on the production process of cultivated meat & seafood can build consumers' familiarity and acceptance.

ABOUT THE APAC SOCIETY FOR CELLULAR AGRICULTURE

The Asia-Pacific Society of Cellular Agriculture is the region's industry association for the cultivated meat and seafood sector, with the goal of changing the way we approach conventional food production and consumption.

Headquartered in Singapore since 2022, we are working closely with regulatory bodies, policy experts, scientists, and consumers, to facilitate the development of robust regulatory frameworks for the cultivated food industry, and to advocate for a safe and sustainable future.

APAC-SCA Regional Initiatives

To encourage continuous and systematic cross-border dialogue between companies, industry associations, think tanks, governmental agencies and regulators in different jurisdictions, APAC-SCA and GFI APAC formed the Asia Pacific Regulatory Coordination Forum in 2023.

The Forum focuses on all aspects of cultivated foods fit for human consumption. It is intended to complement activities carried out by regulators, to assist in the mutual recognition of coordinated regulatory frameworks in APAC, and in doing so, to minimise trade barriers and cost to consumers. The Forum has issued two white papers on cell culture media components and cell line development in 2024, with ongoing work on alternative to animal testings in 2025.

APAC-SCA Membership

Our members are founders of trailblazing ventures invested in advancing cultivated meat and seafood to meet the soaring protein demand; for better health, security, and sustainability.

Aleph[®]
Farms

avant

Cell
AGRITECH

DaNAgreen

IntegriCulture

seawith

Kanadevia
Kanadevia Bio Corporation

MEATABLE

GOURMEY
SAVOUR THE WORLD

APAC-SCA Consumer Studies (Full Reports)

The latest consumer report in China's tier 1 cities complements APAC-SCA's established research covering South Korea and Japan. The [full reports](#) are rich in data and offer a local perspective on market readiness, consumer education needs, and product positioning strategies.

Each country report is available for purchase at USD 2,000, or as a complete bundle of all three markets for USD 5,000. Proceeds from the consumer report sales shall support research surveys in other countries, educational initiatives, and industry development efforts across the APAC region.

Want to know more? Contact us at info@apac-sca.org



APAC-SCA

Asia-Pacific Society for
Cellular Agriculture

info@apac-sca.org

www.apac-sca.org