

Cultivated Meat in India

Consumer awareness,
perceptions, drivers
& barriers



*This image is AI-generated



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About the Good Food Institute India

The Good Food Institute India (GFI India)* is the leading expert on India's emerging smart protein sector—the ecosystem of plant-based, cultivated, and fermentation-derived meat, eggs, and dairy. Drawing on India's unique strengths—including indigenous crops, a strong agrarian economy, low-cost technologies and infrastructure, an abundant talent pool, and biomanufacturing prowess—GFI India provides strategic market intelligence, ecosystem development support, and sector-focused advisory to institutional, academic, business, and civil society stakeholders across the smart protein value chain. Our work is also informed by the global research, technical expertise, and best practices shared by our international network of organisations across the U.S., Brazil, Europe, Israel, Japan, and APAC. Our team of experts across science, business, and policy helps our partners unlock the knowledge and resources needed to transform how meat is made—satisfying rising food demand in ways that accelerate climate progress, protect animals and ecosystems, and strengthen public health.

At GFI India, we're dedicated to positioning India as a global leader in the rapidly evolving smart protein sector.

*GFI India refers to the brand name used by Alternative Protein Solutions Pvt. Ltd. (APSPL).

Executive summary

In India, meat consumption is deeply embedded in the lives of regular consumers, driven by its perceived nutritional value, sensory appeal, habit, and emotional connection. Meat eaters consider it to be a key source of protein (62%) and an indulgent, satisfying food (52%), integral to their everyday meals. At the same time, concerns around freshness and quality (46%), disease and contamination risks (39%), and the use of antibiotics and hormones (33%) persist, alongside a growing awareness of long-term health impacts (40%). This creates a clear whitespace for solutions that can deliver the benefits of meat without its perceived drawbacks.

In this context, cultivated meat can emerge as a highly relevant and compelling proposition. Following exposure to and explanation of the concept, consumers demonstrate a clear understanding that real meat can be produced from animal cells without the need for slaughter, offering an equivalent nutritional profile and sensory experience. The concept is received with strong positive reactions, including curiosity, surprise, and interest, with over 52% rating the concept as “excellent” and ~91% finding it appealing. It is viewed not as a substitute but as “real meat made differently”.

This positive response is further validated by consumers on key perceptual dimensions, with 90% believing in its authenticity, 93% finding the concept suitable, and 93% perceiving it as unique. These metrics highlight that once understood, consumers not only accept the concept but also strongly endorse or prefer it.

Consumers find the concept credible and believable, largely driven by a general trust in the rapid advancement of science and technology. Many view cultivated meat as a logical extension of modern innovation in food, reinforcing the

perception that such developments are increasingly possible.

Cultivated meat also directly addresses many of the concerns consumers associate with conventional meat. The product is perceived as clean, safe, and produced in a controlled environment, helping alleviate concerns around hygiene, contamination, and overall meat quality. The absence of antibiotics and growth hormones in cultivated meat end products provides a significant benefit over conventional meat production. The promise of delivering a similar taste, texture, and nutritional profile as conventional meat, without the need for animal slaughter, further enhances its appeal. This combination of getting the benefits of meat along with a more ethical and guilt-free consumption experience creates a strong sense of curiosity and differentiation.

Consumer openness is exceptionally high, with 94% expressing an intent to try cultivated meat. However, adoption is expected to be gradual, and consumers are likely to begin by integrating cultivated meat along with conventional meat before transitioning. Chicken emerges as the most preferred entry point, given its familiarity and versatility in local diets and cuisines.

The primary barriers to adoption are not rooted in rejection of the concept but in uncertainty and practical considerations. Consumers seek reassurance on the safety of the food, the ingredients used, and the production process, along with clarity on taste, formats, and availability. Cost is a critical factor, with expectations that cultivated meat should be priced at par with or only marginally higher than conventional meat. While three in four consumers expect prices to be higher than conventional meat, willingness to pay is largely capped at a 15–20% premium for regular consumption. At the same time, 52% of consumers indicate they would consume both cultivated and

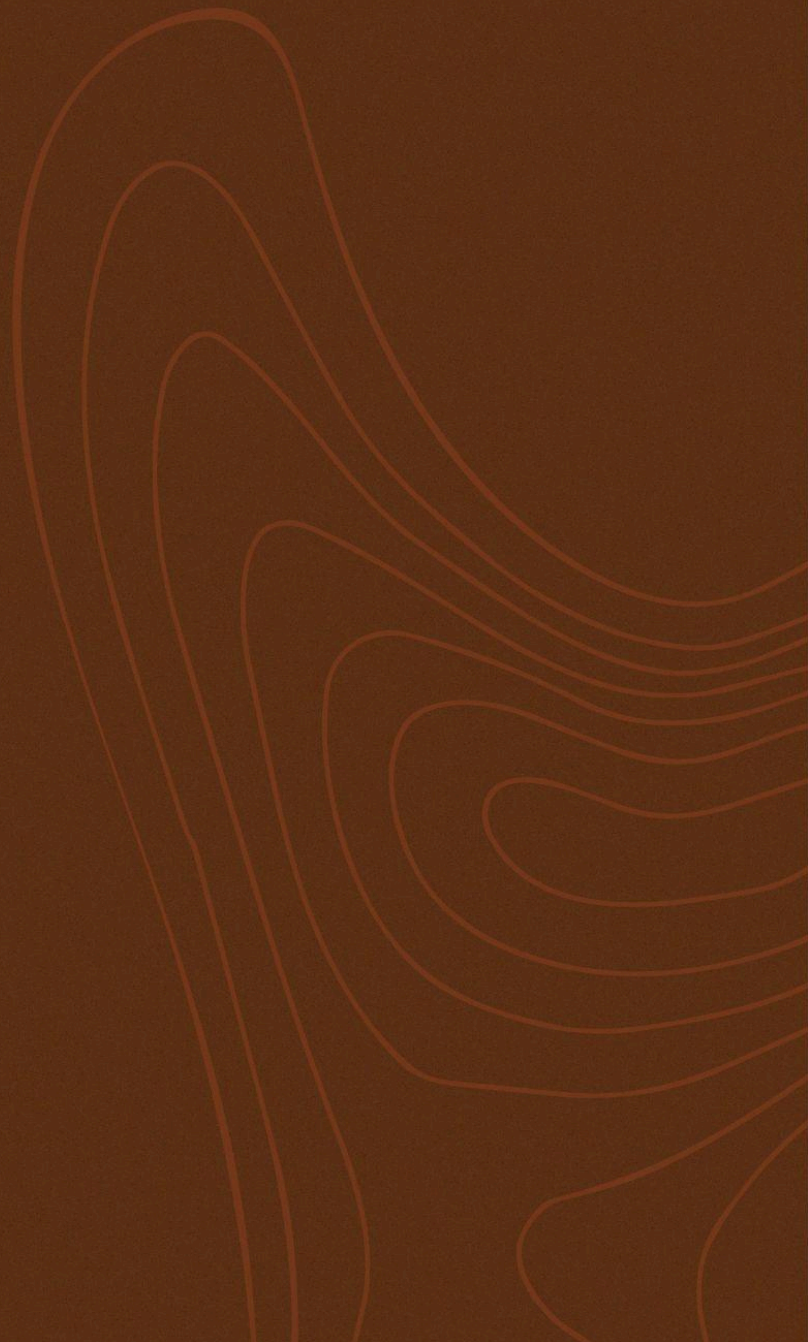
regular meat in some form if expectations on taste, texture, and price are met, reinforcing a complementary coexistence model rather than outright replacement.

In this context, trust emerges as the single most critical enabler. Consumers require strong validation through regulatory approvals and safety certifications (14% cite FSSAI approvals as key), alongside transparent communication of the production process (~11% each for clarity and access to information). Endorsements from credible experts, trusted brands (9%), and visible market presence, along with social validation (8%), further reinforce confidence.

Finally, cultivated meat represents a strong emerging opportunity in urban India, underpinned by high consumer openness (94% show an intent to try), strong appeal (~91%), and no fundamental resistance to the concept. Despite only one in two consumers being familiar with the category, post-exposure validation is exceptionally strong (93% suitability, 90% believability, 93% uniqueness). While still at a nascent stage, the category demonstrates significant early-market potential among younger, digitally fluent urban non-vegetarians (flexitarians)—who (seven in ten) proactively try new food categories—indicating a strong foundation for future adoption and scale.

Introduction & Methodology

Section 1



1.1 Introduction

Cultivated meat is an emerging industry globally, with regulatory approvals limited to a few countries. In India, a small number of companies are engaged in the development and early-stage commercialisation of cultivated meat. Currently, no products are at the stage of regulatory approval or market entry.

The category is expected to fall under the Food Safety and Standards (Approval for Non-Specified Food and Food Ingredients) Regulations, 2017, as a 'novel' food. The regulations provide a broad framework for safety and risk assessment for all novel foods, and the applications are considered on a case-by-case basis.

As the sector evolves in India, there is a growing need to understand how Indian consumers perceive cultivated meat—from awareness and relevance to potential adoption. Evidence of consumer interest and demand can play an important role in informing policymakers and regulators about how they perceive emerging food innovations.

In this context, this study assesses consumer awareness, perceptions, and acceptance of cultivated meat in India. The findings aim to provide a consumer-led perspective to support ongoing dialogue among regulatory and policy stakeholders.

1.2 Research methodology

Objective:

To understand consumer awareness, perceptions, and acceptance of cultivated meat in India and identify key drivers and barriers to its adoption.

Methodology:

The study, conducted in two phases, adopted a mixed-method approach, combining qualitative and quantitative research.

Phase I - Qualitative (Focus Group Discussions)

A total of eight FGDs were conducted across cities, genders, and age groups, with four respondents in each group.

City	Women	Men
Delhi	26-35 Years	18-25 Years
Mumbai	26-35 Years	36-44 Years
Bangalore	18-25 Years	36-44 Years
Hyderabad	26-35 Years	36-44 Years

Phase II – Quantitative (Online Survey)

A total of 414 responses were collected through online self-completion interviews using consumer panels.

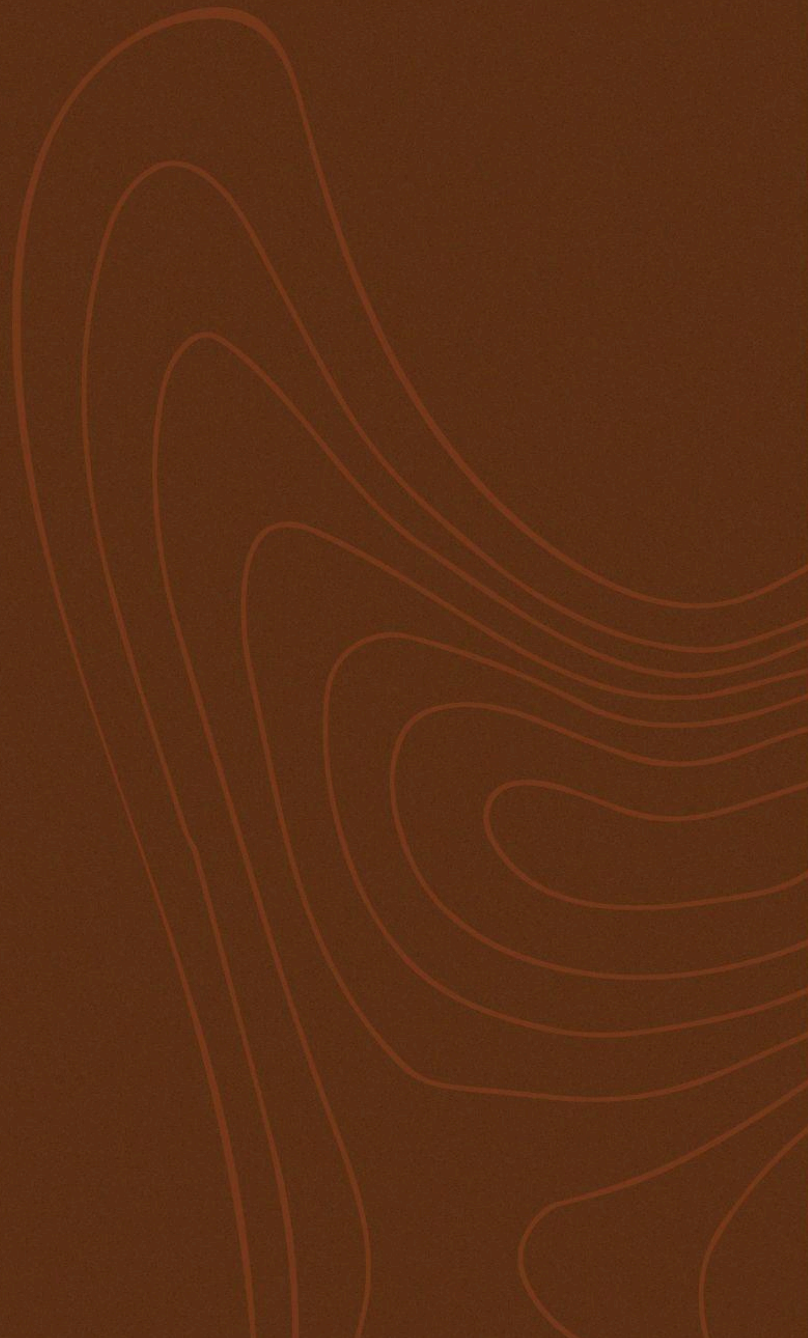
1.3 Target audience:

The target audience for the study was defined based on learnings from previous research on alternative proteins, which consistently identified younger, urban, affluent non-vegetarians as the most likely early adopters of emerging food technologies.

Age	18–44 years
Gender	Men and women (balanced representation)
Education	Graduates and post-graduates
Combined household income	INR 1,50,000+ per month
Location	Delhi, Mumbai, Bangalore, Hyderabad
Diet	Flexitarian (non-vegetarian)

Current Meat Consumption: Drivers and Concerns

Key Findings Section 2



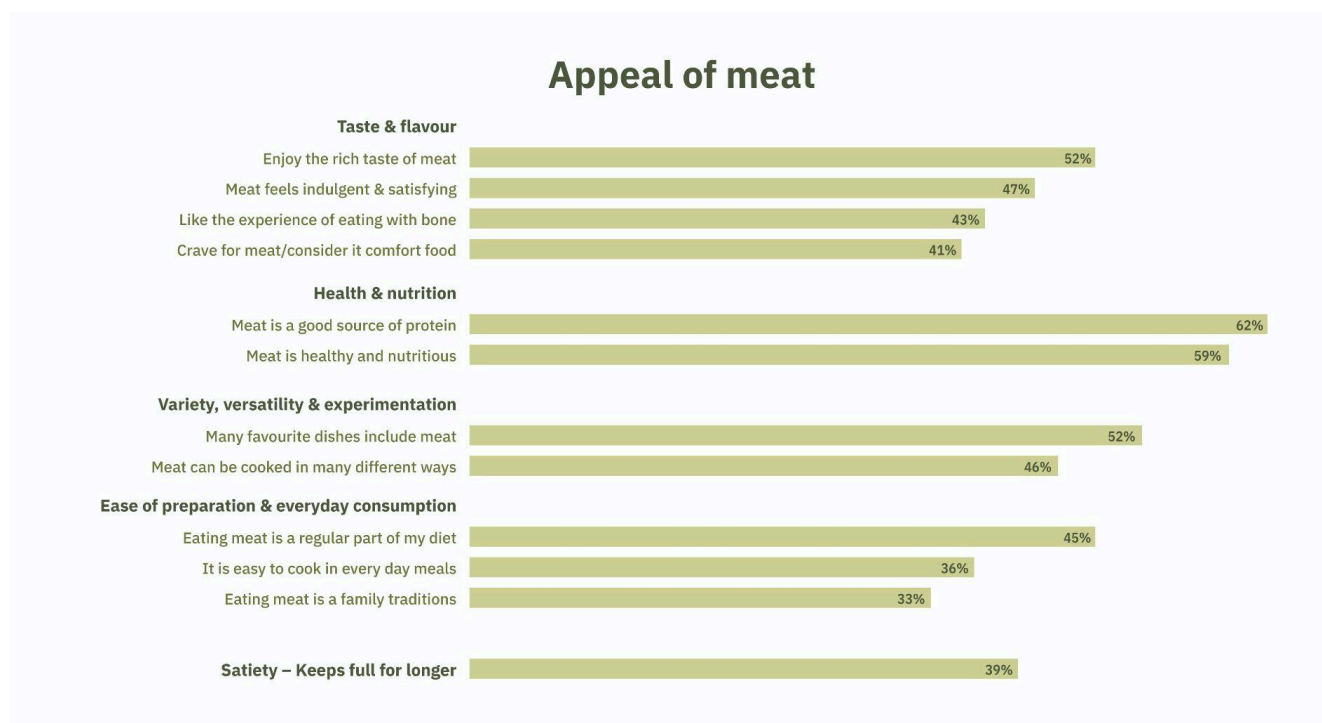
2.1 Consumer attitudes towards meat consumption

Meat consumption is deeply embedded in the lives of consumers, driven by its perceived nutritional value, sensory appeal, habit, and emotional connection. Consumers strongly associate meat eating with health and nutrition, with **62% specifically identifying it as a key source of protein**. It is perceived as a nutritional powerhouse, providing essential vitamins, supporting muscle and bone strength, and delivering long-lasting satiety. This sentiment is notably prevalent among women and gains momentum with age. Consumers in the **older demographic (35+ years)** maintain that acquiring protein through natural food sources, such as meat, is far superior to a dependence on medicinal alternatives or dietary supplements.

Taste and indulgence are other important drivers, with **52% of consumers citing the rich taste of meat as a primary motivator for consumption**. Meat is described as a “mouthwatering” and indulgent experience with a rich aroma, flavour, and texture that satisfies deep cravings. The **experience of eating meat on the bone (43%)** further enhances this sensory appeal, making it a distinctive and preferred eating experience. Additionally, **41% associate meat with cravings or comfort food**, highlighting its emotional and indulgent value.



What do you like/enjoy about consuming non-vegetarian food/meat?



Consumers also appreciate the **versatility and ease of integrating meat into everyday meals**, with 52% highlighting that many of their favourite dishes include meat. 46% of consumers note that meat can be cooked in multiple ways—either fried, steamed, grilled, or cooked in gravies—allowing for constant experimentation

without compromising on taste. More than a third of consumers find meat dishes easy to prepare as a regular dietary staple, reinforcing its everyday relevance.

Beyond practical benefits, meat has an **emotional significance in the consumers' lives. Meat consumption is often linked to comfort and nostalgia**, serving both as a component of daily meals and a special indulgence during social occasions.

For many consumers, therefore, meat represents a rare combination of taste, nutrition, convenience, and emotional satisfaction.

“ Non-vegetarian food is quite juicy and even tasty. It's also protein and even provides vitamins. So, it's nutrition plus taste. – Hyderabad, Female, 26-35 years

(Meat offers) versatility. We can fry it. We can steam it. We can do tandoor. And we can also make it into gravy. - Bangalore, Male, 36-44 years

When guests come, there is no doubt, they'll eat chicken. It's one of the dishes that will obviously be there. – Hyderabad, Female, 26-35 years

I think it's mainly the taste, you know? Sometimes, like on Tuesdays and Saturdays, we don't eat (non-veg). But I think it's the craving and the taste that stays. Sometimes when you listen to religious kathas and such, you feel like you should give it up. But still, you end up having it—the cravings don't go away. When you go to a hotel, you don't even know what vegetarian food to order. You don't feel like ordering things like aloo gobi or dal. The craving just never really ends. – Mumbai, Female, 26-35 years

”

2.2 Consumer concerns associated with meat

Freshness, quality, diseases/contamination, and long-term health implications emerge as the dominant concerns with meat consumption for consumers across cities, age groups, and genders. Foremost concerns are related to **freshness and quality**, with **46% of consumers highlighting this as a key issue**, especially when purchasing seafood or shopping online. Consumers rely on visual cues, such as colour and appearance, to assess quality. Traditional butcher shops, on the other hand, are often perceived as smelly, unclean, and unappealing to shop from. These concerns extend into **fears of contamination, diseases, and the overall safety of the meat consumed (39%)**.

Further, consumers are also concerned about how the animals have been raised. The **use of antibiotics and hormones in farmed animals to make them 'grow' fast (33%)** is a recurring concern among consumers. Consumers believe poultry and livestock are often injected to accelerate growth, raising apprehensions about the long-term health impact of consuming such meat. Some consumers, particularly women, associate this practice with hormonal imbalances and conditions like PMOS (Polyendocrine Metabolic Ovarian Syndrome).

Note: Antibiotic usage in livestock is regulated with FSSAI prescribing maximum residue limits (MRLs) for veterinary drugs in food products.¹

¹<https://fssai.gov.in/upload/notifications/2024/10/67178d79690b3antibiotic%20gazette.pdf10>

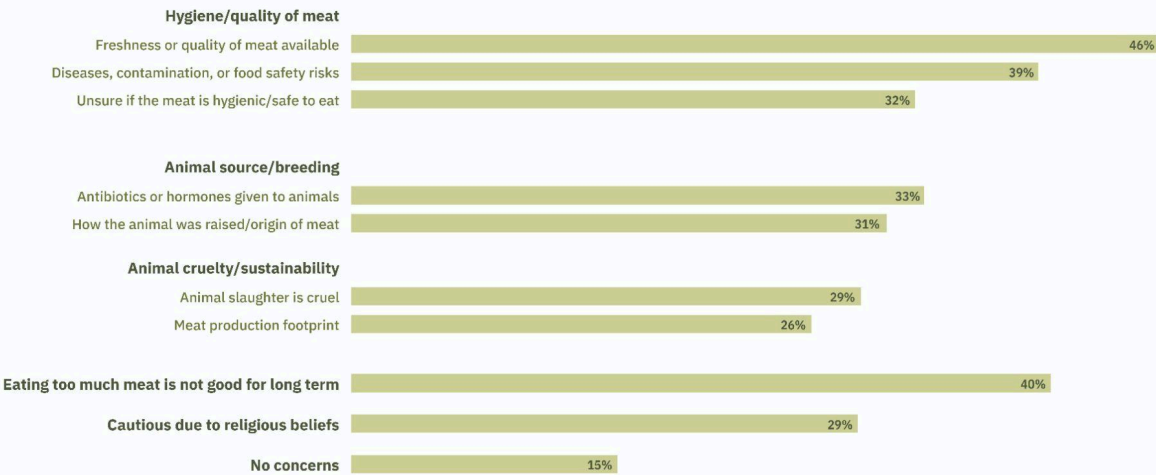
Long-term health concerns are also significant, with **40% of consumers believing that eating too much meat is not good over time**. Consumers feel that overconsumption of meat can lead to issues such as increased cholesterol. They also perceive meat as difficult to digest and heavy on the stomach, with these concerns becoming more pronounced among those aged 35+ and particularly among males. It is also popularly believed that eating meat can increase “body heat”, leading to issues like acne.

Animal cruelty does not emerge as a widespread concern among regular consumers of meat. When prompted, consumers acknowledge it as a concern, but their consumption decisions are not directly driven by it. Some consumers experience a sense of discomfort or guilt when exposed to content such as videos depicting animal suffering, but these concerns are usually allayed in subtle ways like reducing meat intake on specific days or occasions, often influenced by cultural or religious practices rather than leading to a complete shift in consumption. Industrial animal agriculture does not emerge as a significant concern with limited mention even when probed.



Do you have any concerns when it comes to consuming meat?

Concerns with meat consumption



“ I feel when it comes to meat, it needs to be cleaned and cooked correctly. If not cooked correctly, it creates a lot of digestion issues like stomach bloating and constipation. –
Bangalore, Male, 36-44 years

So basically, the concern is that antibiotics or growth hormones are being administered to these animals. Because many times what happens is that they quickly give injections to

make them grow bigger so that they gain weight and start looking bigger. – Delhi, Female, 26-35 years

When I was very young, we used to go to the local butcher, and they cut it over there. It always creates a bad image to see that. But over the years, we got adjusted to it. – Bangalore, Male, 36-44 years

One thing is there; 95% of people, I think, don't see it. The process, what happens behind the door, what gets cut. They directly buy it. – Mumbai, Male, 36-44 years

And sometimes when we order online, I feel even though they mention the date also, I still wonder whether it is still fresh or not – Bangalore, Female, 18-25 years

It's like I am very healthy. I don't have any health issues. But still somewhere in the corner I feel like seeing these Instagram reels or influencers talking about going vegetarian to vegan and all, somewhere I feel I'm overeating. So, I sometimes feel I must reduce it because I'm harming many animals. – Bangalore, Female, 18-25 years

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2.3 Openness to trying new food categories

Consumers show a strong openness to trying new foods, with **72% of them proactively trying new food categories. 22% of the respondents, on the other hand, prefer to wait for greater social validation before trying.**

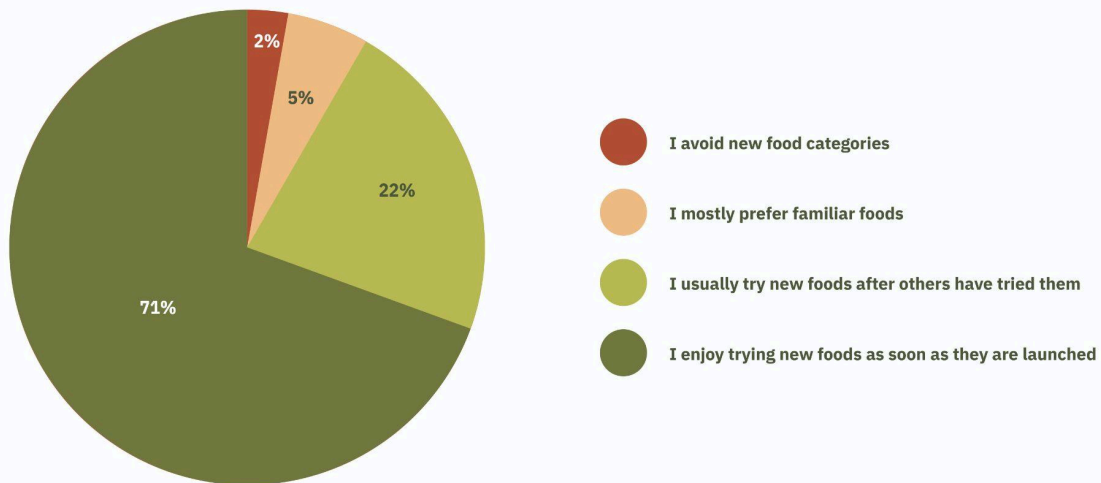
This openness is rooted in consumers' desire to experiment. They describe their food choices as rooted in exploration, actively seeking new restaurants, cuisines, and recipes. Consumers' everyday food choices and routines provide a sense of comfort and familiarity without limiting their willingness to explore.

Digital and social media play a central role in enabling consumer interest and experimentation in food. Food and lifestyle influencers across platforms like Instagram and YouTube, as well as cooking shows and chef competitions, along with food delivery apps such as Swiggy and Zomato, are key discovery engines for new dishes, recipes, food technologies, and culinary trends.



How do you feel about trying new food products or categories?

Openness to trying new categories



I really like exploring awesome new recipes. I like to explore new restaurants and new recipes. – Hyderabad, Female, 26-35 years

My travel, YouTube, social media are how I discover new products, cuisines, or new technology that is being used in food. - Bangalore, Female, 18-25 years

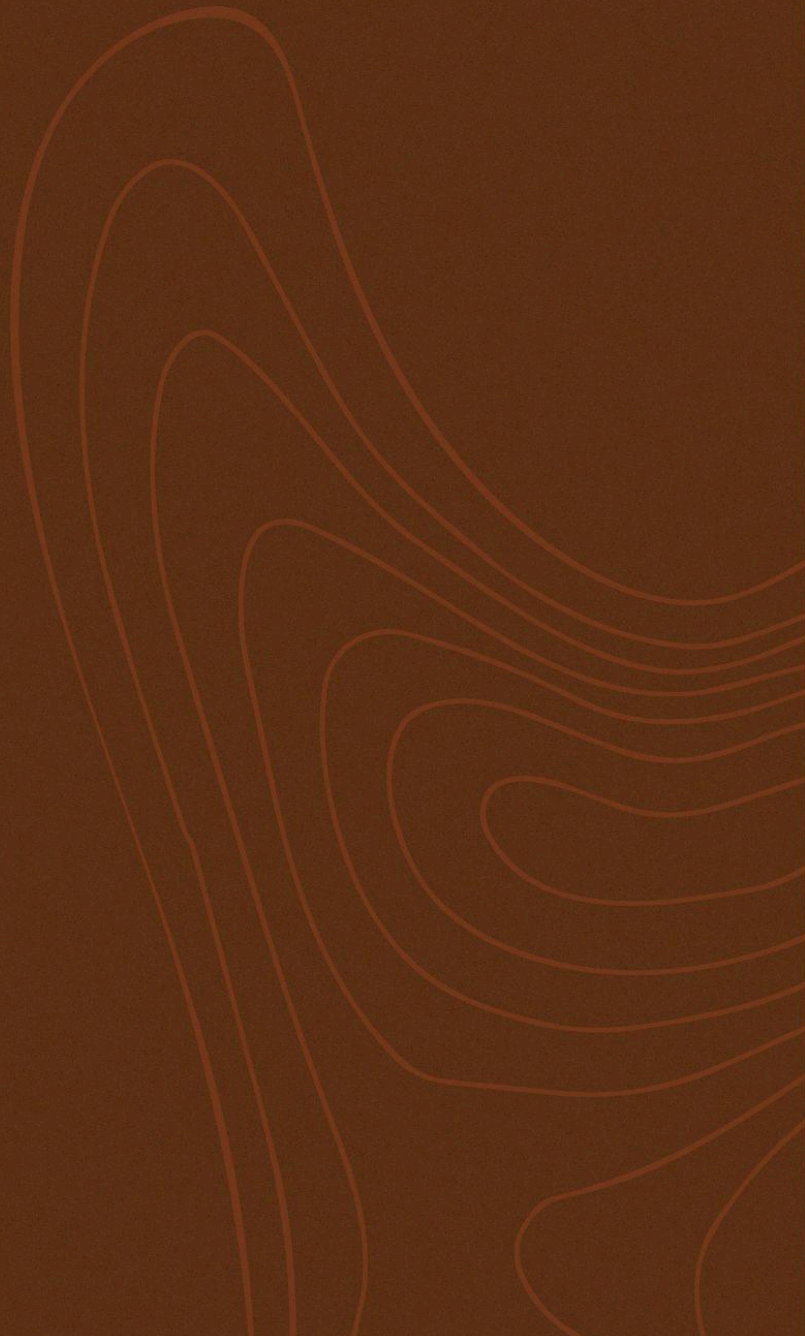
I like to experiment, plus stick to usual products, both. It is a fifty-fifty ratio. – Delhi, Female, 36-44 years

Most of my discoveries are through social media, friend circles, advertisements, and family. - Delhi, Male, 18-25 years



Consumer Response to Cultivated Meat

Section 3



As part of this research, consumers were introduced to a concept that detailed the manufacturing process of cultivated meat and its key benefits. Qualitative and quantitative data about their perceptions and attitudes was collected.

Cultivated meat is real meat, made in a new and smarter way

Step 1:

- A very small sample of cells is taken safely from a live healthy animal like chicken, fish, or meat.
- The animal is not harmed and continues to live



Step 2:

- These cells are placed in a clean, warm, food-grade media containing many growth promoters, including sugars, amino acids, vitamins, and minerals that are commonly found in everyday foods.
- This environment is carefully controlled for cleanliness, temperature, and safety.
- It is similar to how curd, yogurt & bread are produced at scale in



Step 3:

- Over time, the cells naturally multiply and form muscle, fat, and connective tissue.
- As the cells grow, they are placed onto specialised scaffolding to structure them like real meat.



Step 4:

At the end of the cell growth, maturation, and product preparation, the result is meat that:

- Looks like meat
- Cooks like meat
- Tastes like meat
- Has similar protein and nutrition

This meat can be used just like regular meat – in curries, biryanis, or any other meat preparations.



Cultivated meat is not plant-based meat, artificial or chemically made food, nor vegan.

Benefits of cultivated meat

No antibiotics or hormones in the end product.



The animal is not harmed or slaughtered.



The facilities are controlled for cleanliness, temperature, and safety.



The facilities use less land and water as compared to large farms, therefore reducing the pressure on the environment.



Cultivated meat is 100% real meat, grown directly from animal cells—just made in a cleaner, safer way to give you the same taste, texture, juiciness, and nutrition.

3.1 Awareness of cultivated meat

Among alternative meats, plant-based alternatives are more commonly known. Consumers are familiar with options such as soya, jackfruit, and tofu and describe them as plant-based meat, mock meat, vegan chicken, soya chaap, or soya chunks. Some recall encountering such products through platforms like Shark Tank or seeing them in retail or online marketplaces. Despite this awareness, consumers show limited interest in meat alternatives. Among the respondents who have tried plant-based options, they have found them to be lacking the taste and juiciness of conventional meat, with availability also cited as a constraint to repurchasing.

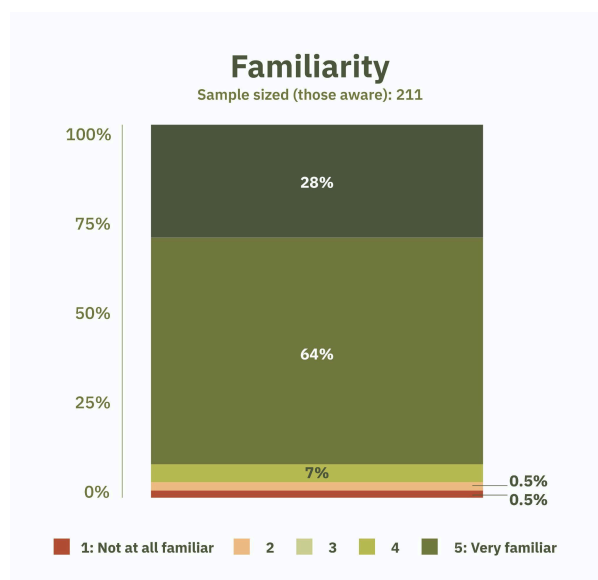
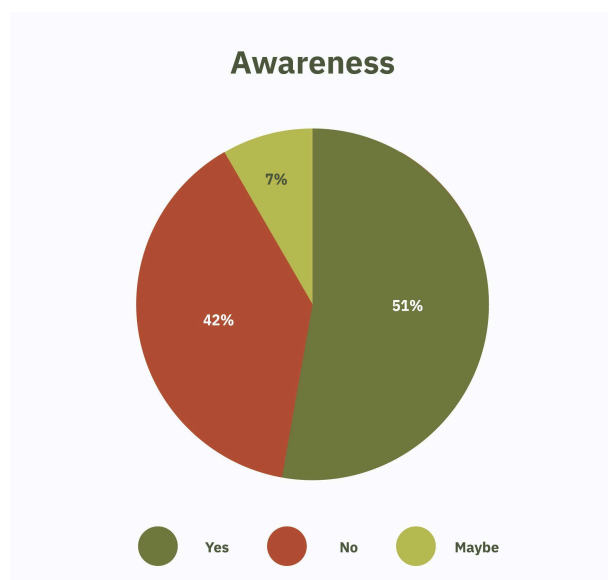
Awareness of cultivated meat is relatively lower than plant-based alternatives. **One in two consumers claim to be familiar with cultivated meat**, with greater awareness seen among frequent meat consumers (**66% among daily meat consumers vs 36% among occasional meat consumers**) and those more open to trying new food categories (**55% vs 41%**). Younger consumers also tend to be more aware compared to older cohorts. Despite a fair level of awareness, only 28% of consumers report high familiarity with the concept.



Have you heard about this idea/concept before we showed you the product description?



How familiar are you with this idea/concept?



Three in four consumers recognise some of the nomenclature associated with the category of cultivated meat. The awareness is significantly higher among frequent meat consumers (**84% among daily meat consumers vs 60% among occasional meat consumers**) and increases with affluence (**53% among higher-income groups vs 39% among lower-income groups**). The term “cultivated meat” shows relatively higher familiarity overall, particularly among daily meat consumers.

Awareness of alternative meats is largely driven by access to digital media, with social and online platforms playing a central role in shaping consumer understanding. **Social media emerges as the single largest source of information for awareness (62%)**, significantly ahead of other channels. This is followed by online articles (46%).

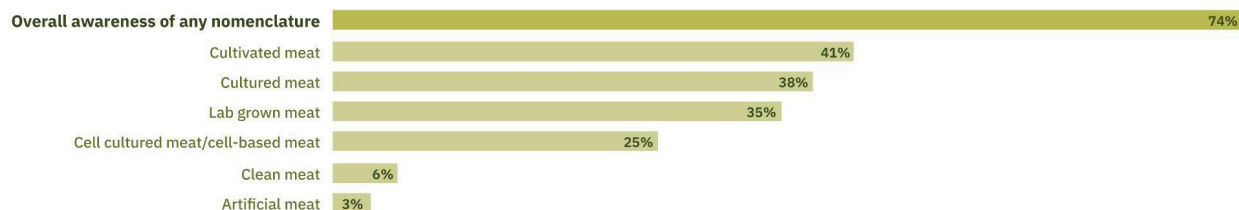
This trend emerges stronger among those consumers who experiment with food, new cuisines, and recipes. Those who actively enjoy trying new food categories show higher awareness through **social media (67% vs 51%)** and **online articles (51% vs 34%)**, compared to those less inclined to experiment.

Beyond purely digital sources, exposure through varied food experiences plays a role in building awareness about meat alternatives. Physical and experiential touchpoints such as restaurants, food outlets, and food events (45%) contribute meaningfully. Word-of-mouth through friends, family, and colleagues; news websites; newspapers or magazines; and podcasts also play a role to an extent. International travel and educational institutions also help build awareness.



Have you heard or read about any of the following?

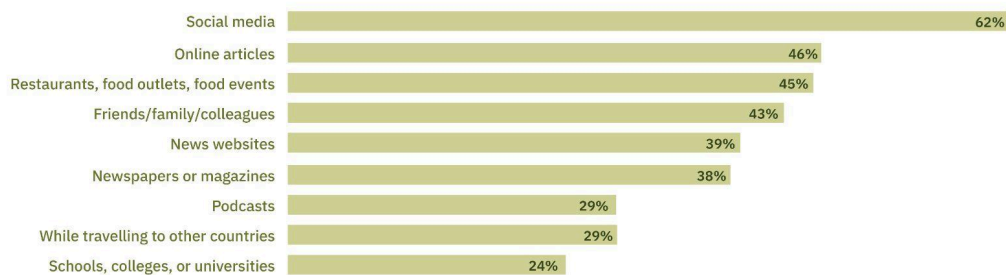
Familiarity with the nomenclature





Where did you hear about these alternate types of meat?

Source of awareness



I have heard of lab-grown meat; they produce meat in a lab. - Delhi, Male, 18-25 years

I keep watching a lot of reels on Facebook. I think some research is happening in Dubai or somewhere. They're able to produce meat—cultivated meat—without losing any of its nutrition value or slaughtering. Somebody made a small video on that. I forgot the creator's name. - Bangalore, Male, 36-44 years



3.2 Consumer understanding and appeal of cultivated meat

Consumers' first reactions to the concept of cultivated meat are overwhelmingly positive, marked by **delight, surprise, and curiosity**. Most consumers are “wowed” by the idea, responding positively to the novelty and uniqueness of producing meat through advanced technology. The concept is entirely new, and several consumers express amazement at the prospect of creating real meat without slaughtering animals.

To make sense of something so novel, consumers actively relate it to familiar processes. Some compare it to **plant growth, where a small cutting can grow and multiply when provided with the right nutrients and placed in the right conditions**. Others liken it to **fermentation processes**, such as making yoghurt or bread, while some compare it to more complex processes like **IVF**, describing it as “building from one cell to many.” These comparisons help bridge their understanding and make the concept feel more tangible and believable.

Despite the novelty, most consumers comprehend the core concept. When explained, consumers are able to clearly grasp the fundamental premise that real meat is grown from animal cells without the need for killing animals while still offering a similar taste, texture, and nutritional value as conventionally grown meat.

52% of the respondents rated the concept of cultivated meat as excellent. Those who are more open to trying new foods rate the concept more favourably (58% vs 36%), and frequent meat consumers also show stronger positive reactions (67% among daily consumers vs 38% among occasional consumers).

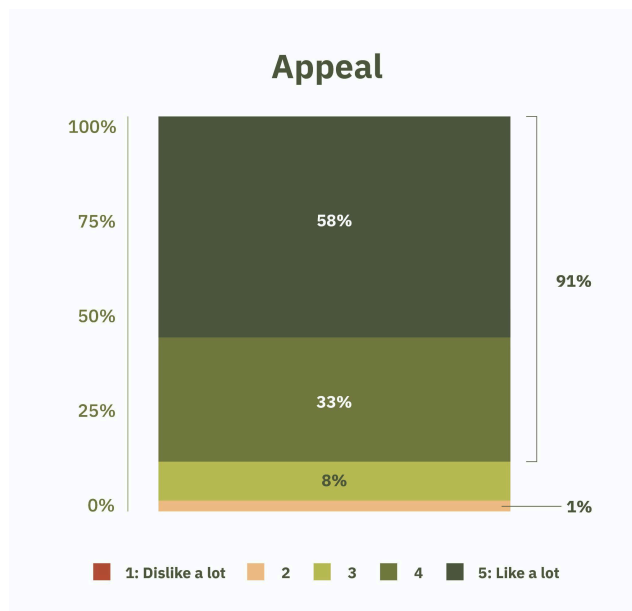
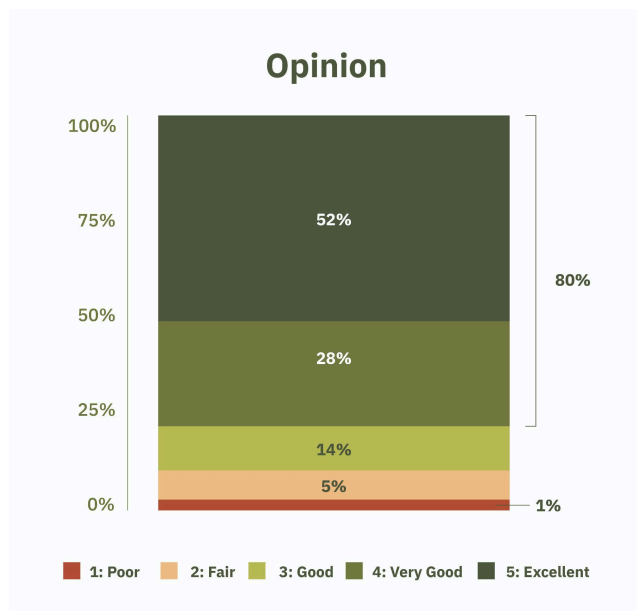
This positive perception is further amplified by its appeal. **90% of consumers express a strong appeal for the concept (top 2 box)**, with a majority (58%) stating they “like it a lot.”



Taking everything into consideration, which of these phrases best describes your overall opinion about the idea or concept description that you just read?



How appealing do you find this idea or concept based on the description you just read?



The appeal of cultivated meat is driven by perceived benefits that are functional and emotional in nature. The primary appeal is the perception of **safety and hygiene**, with meat produced in a clean, controlled environment. The **absence of antibiotics and hormones in the end product** is also a major positive, addressing existing concerns around conventional meat. The thorough explanation of the process was well appreciated by consumers, helping demystify what goes into producing cultivated meat. The perceptions are rooted in consumer concerns despite existing regulations on veterinary drug residues in livestock products.²

The concept of eliminating animal slaughter to produce real meat is well received. While most consumers are not actively deterred by animal welfare concerns, it becomes a strong positive once introduced, contributing to the perception of cultivated meat as a more ethical and environmentally friendly option. Sustainability benefits, including reduced land and water use, further enhance its appeal.

Importantly, consumers view cultivated meat as an **“actual” alternative to conventional meat, rather than a compromise**. The promise of similar taste, texture, and nutritional value, combined with better hygiene and quality, drives an overall positive perception.

²<https://fssai.gov.in/upload/notifications/2024/10/67178d79690b3antibiotic%20gazette.pdf10>



How did you feel after reading this idea/concept?

Emotional response

Sample Size (All): 414



“ We are getting the same meat, but they were not slaughtering animals. Instead of that, they were taking the cells from the animals. Producing the same healthy meat. So, everything, everything the same. – Hyderabad, Female, 36-44 years

Safe. Space. Interesting. Advanced technology. I honestly thought that this is what I've already heard, it's a concept from abroad. Now if it's available in India, it'll be quite good. – Bangalore, Male, 36-44 years

It was very good. Instead of killing animals, they were just taking the cells. Instead of slaughtering animals, this is the best idea I can say. – Hyderabad, Female, 26-35 years

This is fascinating to me and brings less harm to the environment. – Bangalore, Female, 18-25 years

This is like IVF nowadays. It's interesting. So, it is like a cell which is removed and, you know, cultivated or harvested outside the body. To a whole human or to a whole bird. You'll get the same flesh, same nutrients, without harming a bird. – Mumbai, Female, 26-35 years

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Sometimes, the meat will not be in good condition. We waste a lot of time cleaning before cooking, and you know, hygiene concerns will be catered to, and it will require less effort in cleaning and cooking. – Bangalore, Female, 18-25 years

”

A few consumers demonstrate initial scepticism and confusion around how the production process works. A few consumers seek more clarity on how microscopic cells grow into meat, production timelines, and technical details. Isolated concerns around **price, availability, ingredients, shelf life, format, and potential side effects** also persist. Some consumers question whether the product would deliver the same taste and texture as meat or be available from a trustworthy source.

“ Now I must experiment with how it tastes, and I wanted to know whether it has any side effects. They are mentioning there are no side effects, but still I wanted to see because we know, right, like in China, they did some experiment and corona everywhere, and we are not sure something may come up due to this experiment. – Hyderabad, Male, 36-44 years

A naturally grown one will have the bones and the different tenderness, juiciness...those things might be missing here. – Hyderabad, Male, 36-44 years

I am just concerned that probably it's going to be very pricey. – Bangalore, Female, 18-25 years

”

3.3 Relevance, credibility, and uniqueness

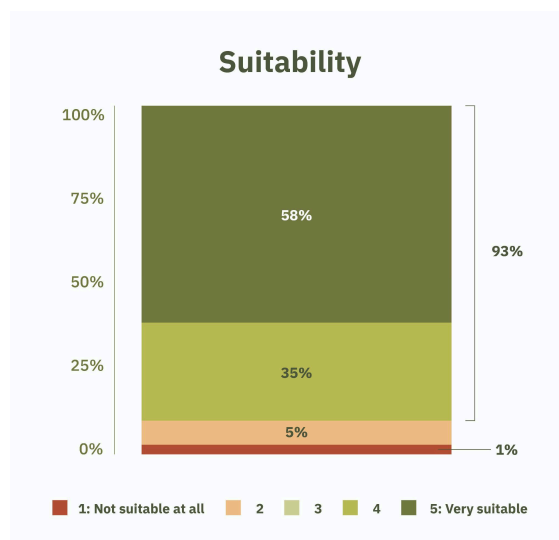
Consumers find the concept of cultivated meat highly relevant, credible, distinct, and strongly aligned to their existing needs and concerns.

Relevance

The concept scores exceptionally high on relevance. **93% of consumers find cultivated meat suitable** (top 2 box), with **58% rating it as very suitable in** addressing any existing concerns around meat consumption. Consumers see it as a solution that delivers **health and nutrition without the associated risks, particularly around antibiotics and growth hormones**. Getting adequate protein and essential nutrients while eliminating concerns makes the concept highly meaningful for older consumers that tend to be more health conscious.



How suitable do you think this idea or concept is for you personally?



The prospect of **hygiene and freshness** further strengthens the relevance of cultivated meat. Consumers frequently associate conventional meat with challenges such as unclean sale environments, unpleasant smells, uncertainty of freshness, and the effort required to clean the meat at home. In contrast, cultivated meat is considered inherently clean and produced in controlled environments, directly addressing these pain points.

Another important layer to relevance is the idea of **guilt-free consumption**—the prospect of consuming meat without harming animals is seen as a strong positive. Some consumers also note that this option could help navigate specific personal or religious boundaries related to meat consumption, making the cultivated meat product more acceptable.

“ When I feel a craving, I eat, but when I watch devotional reels, I start feeling a bit guilty. Now I’ll watch happily. The guilt that is inside, that is suppressed somewhere, that will become guilt-free food. – Delhi, Female, 26-35 years

Because of those antibiotics, so many girls are getting PCOD, PCOS, etc., and all that can be avoided in the future even if you eat chicken regularly. – Bangalore, Female, 18-25 years

People who are more health-conscious would also consume this more. Some people are very particular about where they buy chicken or other non-veg from—places where there is less adulteration and better quality. –Delhi, Male, 18-25 years

Many people, including several in my own family and community, feel uneasy about animal cruelty and have considered giving up meat altogether. I believe this innovation addresses those concerns perfectly. – Mumbai, Female, 26–35 years

”

Believability

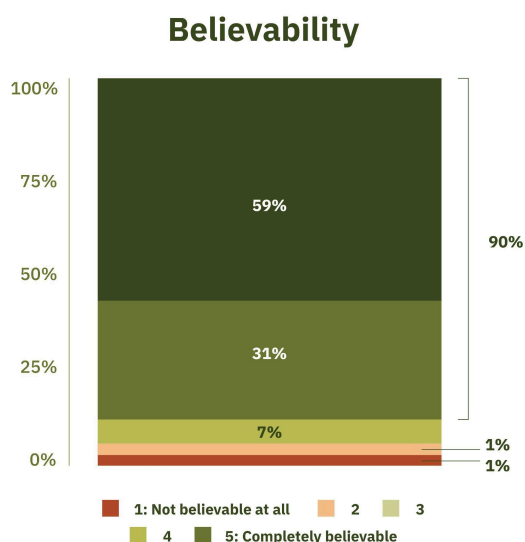
90% of consumers find the concept believable (top 2 box), with a majority (**59%**) citing strong or complete believability. This belief is driven by a broader trust in the **rapid advancement of modern science and technology**, with many expressing how “everything is possible nowadays.” Consumers view the idea of growing meat from cells as a logical advancement in existing scientific capabilities in biotechnology.

However, this belief is accompanied by a need for **reassurance around execution**. Consumers recognise that the process of cultivated meat production involves multiple complex steps, including maintaining controlled conditions and adding specific nutrients at different stages, which leads to some concern around human errors. To build trust, they expect certain assurances, including:

- Association with a known and trusted food brand
- Approvals by the Food Safety and Standards Authority of India (FSSAI) and third-party certifications
- Transparent explanations from credible experts (such as doctors and scientists)
- Social validation, including observing others try the product first



How believable do you think the statements made about the idea or concept?



Technology is going ahead day by day. Everything is possible nowadays. New techniques are available. So, it is believable – Mumbai, Female, 26-35 years

So, in the AI world, it is possible that technology is going ahead day by day. – Mumbai, Male, 36-44 years

I think a brand can give us that trust. If we know which brand it's coming from and how it's coming, then it will be able to give us more trust. – Delhi, Female, 26-35 years

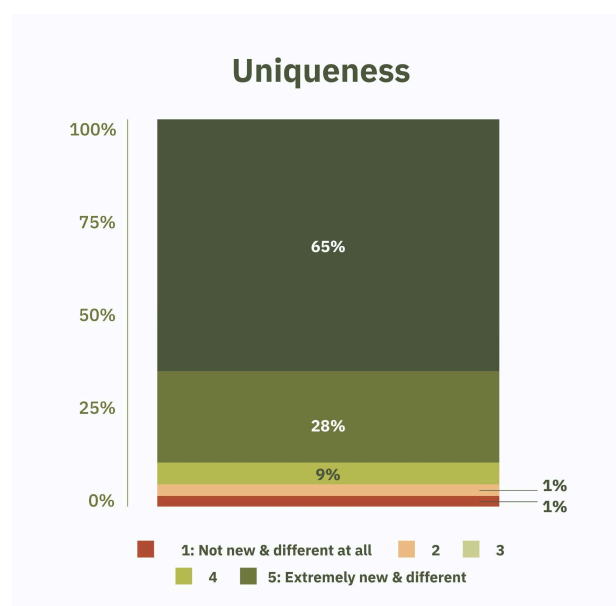
We have the FSSAI who gives the certification. If they give and if it is proven from their end, I think it's good to consume. – Bangalore, Male, 36-44 years

”

Uniqueness



How new & different do you think the idea or concept is compared to regular meat products available in the market?



93% of consumers rate the concept as new and different (top 2 Box). A significant **65% consider it “extremely new and different”**, with scientific innovation evoking a distinct “wow” factor. Consumers find the concept of taking a microscopic cell and multiplying it to replicate the similar texture, taste, and nutritional profile of conventional meat as fascinating and fundamentally different from anything they have encountered before.

This uniqueness also comes through in how consumers distinguish cultivated meat from existing alternatives. **It is clearly understood as real meat, not plant-based**, as it uses actual animal cells rather than attempting to mimic meat using plant-based ingredients.

Consumers further recognise cultivated meat as **more ethical than conventional meat**, as it bypasses the traditional methods of raising and slaughtering animals. The reliance on advanced science and controlled lab environments to produce meat, while still offering a similar sensorial and nutritional experience, makes it stand out as a completely new way of thinking about meat production.

The uniqueness of cultivated meat production also drives strong emotional responses. The concept evokes surprise, with many amazed that it is “actually possible” to produce real meat without slaughtering animals. Curiosity emerges through a desire to experience the product firsthand to understand how it tastes and cooks, compared to conventional meat, while also wanting clarity on the exact manufacturing process to assess safety. In some cases, the consumers find the ethical implications of cultivated meat innovation inspiring.

“ Extremely unique. I never even thought of this idea that we could cultivate it by extracting live cells through any animal. Very new idea for me. – Delhi, Female, 26-35 years

This is like something more scientific, more technological, like you see in movies...something new and unique. – Bangalore, Male, 36-44 years

The process involves no slaughtering, but they are choosing some other ways to produce meat. That's what is inspiring to me. – Delhi, Male, 18-25 years

Just like how seeds are, you know, by using seeds plants are grown, just like that by taking the cells we grow in labs. Now I can relate to that. So, for me it is very interesting. – Bangalore, Female, 18-25 years

”

3.4 Comparison with conventional meat

Consumers expect cultivated meat to perform at par with, and in some cases better than, conventional meat across several key dimensions.

At a fundamental level, cultivated meat is anticipated to ethically outperform conventional meat on considerations of animal welfare and environmental impact. Consumers also expect it to be safe, hygienic, healthy, and nutritious, which are some core reasons for consuming meat in the first place. These benefits resonate consistently across consumer cohorts.

Beyond functional benefits, consumers also expect cultivated meat to deliver on the experience of cooking and eating. It is seen as versatile and convenient, similar to conventional meat. In terms of the experience of consuming cultivated meat, its texture, mouthfeel, taste, and juiciness are expected to be at par with, or even better than, regular meat.

These expectations are particularly strong among frequent meat consumers, with ~65% of daily meat eaters expressing this view, compared to ~55% among those who consume meat three to four times a week and ~50% among those who consume it one to two times a week.

“ You can have it more guilt-free, and you can have it with the assurance that you are having something nutritious and you're getting that proper protein. You're not having antibiotics, all those things. – Bangalore, Male, 35-44 years

Hygiene concerns will be catered to, and it will require less effort in cleaning and cooking.
– Bangalore, Female, 18-25 years

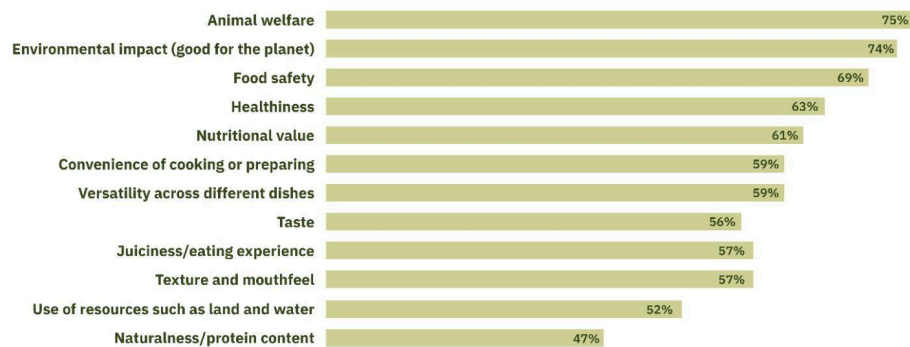
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Compared to regular (conventional) meat, how do you think cultivated meat would perform on the following aspects based on the description you read?

Expectations from cultivated meat vs conventional meat

(% of consumers who believe CM performs much/slightly better than conventional meat)



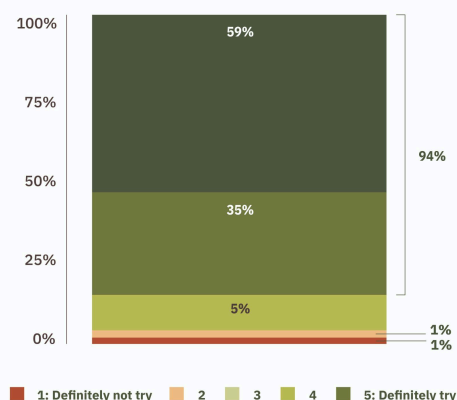
3.5 Intent to try and purchase cultivated meat

Consumers demonstrate a strong intent and excitement to try cultivated meat, driven by curiosity and openness to experimentation. **The intent to try is very high at 94%** (top 2 box), consistent across genders, age groups, and cities, indicating an overwhelming openness to try.



If cultivated meat becomes available in the market, how likely would you be to try it?

Intent to try and purchase cultivated meat



This willingness is rooted in experimentation. Most consumers are open to new food experiences and curious to try cultivated meat at least once. **52% of consumers are interested in consuming both cultivated and regular meat**, reinforcing that the category is seen as **complementary** (including equal consumption, occasional use, or adding it without reducing current intake) to conventional meat consumption. **45% of consumers would like to replace** conventional meat with cultivated meat if cultivated meat meets expectations of taste, texture, and price. **Largely, the openness to adding cultivated meat to their regular diets is higher among daily meat consumers.**

Consumer adoption pathways for cultivated meat

Completely replace the regular meat I eat with cultivated meat	45%
Replace some of the regular meat I eat with cultivated meat	24%
Eat both cultivated meat and regular meat equally	17%
Try cultivated meat occasionally, but continue mostly eating regular meat	7%
Add cultivated meat to my diet without reducing regular meat consumption	4%
Not consume cultivated meat	2%

In terms of purchase and trial behaviour, there is a clear preference to **buy cultivated meat online** through platforms that may be similar to existing brands like Licious and FreshToHome, driven by expectations of better hygiene, details about source and quality, and convenience. Hygienic offline outlets and hypermarkets are likely to play a secondary role.

Consumers trying cultivated meat for the first time overwhelmingly prefer **buying it raw and cooking it at home** rather than trying it at restaurants. This preference is **driven by the need to personally evaluate the product** through touching and smelling while also assessing how it cooks compared to conventional meat. Consumers trust their cleanliness standards at home and prefer to control how the dishes are prepared, including the level of spices and marination.

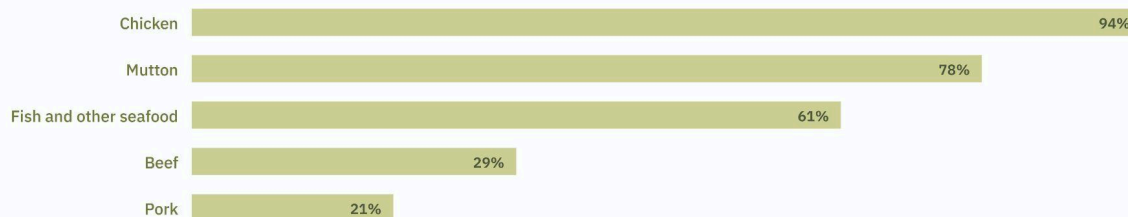
In terms of the product type, **chicken emerges as the clear and unanimous first choice for trial**, with almost all consumers willing to try cultivated chicken. This preference is driven by familiarity, ease of cooking, and versatility, along with the desire to avoid the specific cruelty associated with conventional chicken farming. Trying cultivated **mutton and fish** is relatively lower on the list across consumer cohorts.



What types of cultivated meat would you want to try?

Preference of cultivated meat

Base (Unweighted) : All respondents 414



“ I really want to try it. I’m interested because it’s a new technique. – Mumbai, Female, 26-35 years

I would like to try from Online stores... Licious, Zepto, and FreshToHome because they provide detailed explanation.– Mumbai, Female, 26-35 years

I would first bring it home and verify it myself—what the texture is like, how long it takes to cook, and how clean it is. – Delhi, Male, 18-25 years

If it is readily available, the price is identical, and the taste is the same, I would completely replace it with my regular meat. – Bangalore, Female, 18-25 years

It will be an add-on first. And as we gradually grow accustomed to the taste, I believe it will eventually become a permanent part of our diet. – Mumbai, Female, 26-35 years

When we cook it, we’ll see how it is, we’ll touch it, we’ll smell it, we can feel it. We can see how the original meat is there and what the difference is. I can see the whole process. So that is the reason I first try cooking at home. – Hyderabad, Male, 36-44 years

”

3.6 Consumer willingness to pay

Overall, there is **consensus that cultivated meat will cost more than regular meat**. However, consumers expect the pricing of products to be the same or close to meat product prices to encourage trial and adoption. Consumers reluctantly indicate a willingness to pay a **modest premium of around 15%-20%**, particularly on online platforms where higher prices are already expected.

- About 25% of consumers believe cultivated meat will be priced at par with or lower than regular meat, with this perception higher among younger consumers (31% among 18–24 years vs 18% among 35–44 years)
- A third of consumers expect it to be priced up to 20% higher than conventional meat, a view that is fairly consistent across cohorts
- Another 25% anticipate a higher premium ranging from 20% to 60% above regular meat, with this expectation more pronounced among 25–34-year-olds (31% vs 21% among 18–24 years and 19% among 35–44 years)

Most consumers justify their willingness to pay a small premium based on the additional benefits they associate with cultivated meat. These include guaranteed hygiene, absence of preservatives and antibiotics, similar nutritional value, and the assurance that no animals are harmed. At the same time, a few consumers challenge the idea of a premium, suggesting that the use of technology should ideally make the product more affordable by eliminating the need to raise animals.



If you are currently paying INR 100 for a certain quantity of meat, how much do you think the same quantity of cultivated meat would cost?

Price perceptions

Less than regular meat	8%
About the same price as regular meat (around 100)	15%
Up to 10% higher than regular meat	17%
11–20% higher than regular meat	18%
21–40% higher than regular meat	16%
41–80% higher than regular meat	13%
81% or more higher than regular meat	10%
Not sure	1%



Willing to pay 10% to 30% premium. – Delhi, Male, 18–25 years

Justified because it's cruelty-free and has no hormones and hygiene. – Bangalore, Female, 18–25 years

The chicken we consume is part of our everyday grocery basket, so we can't pay very high prices. – Delhi, Male, 18-25 years

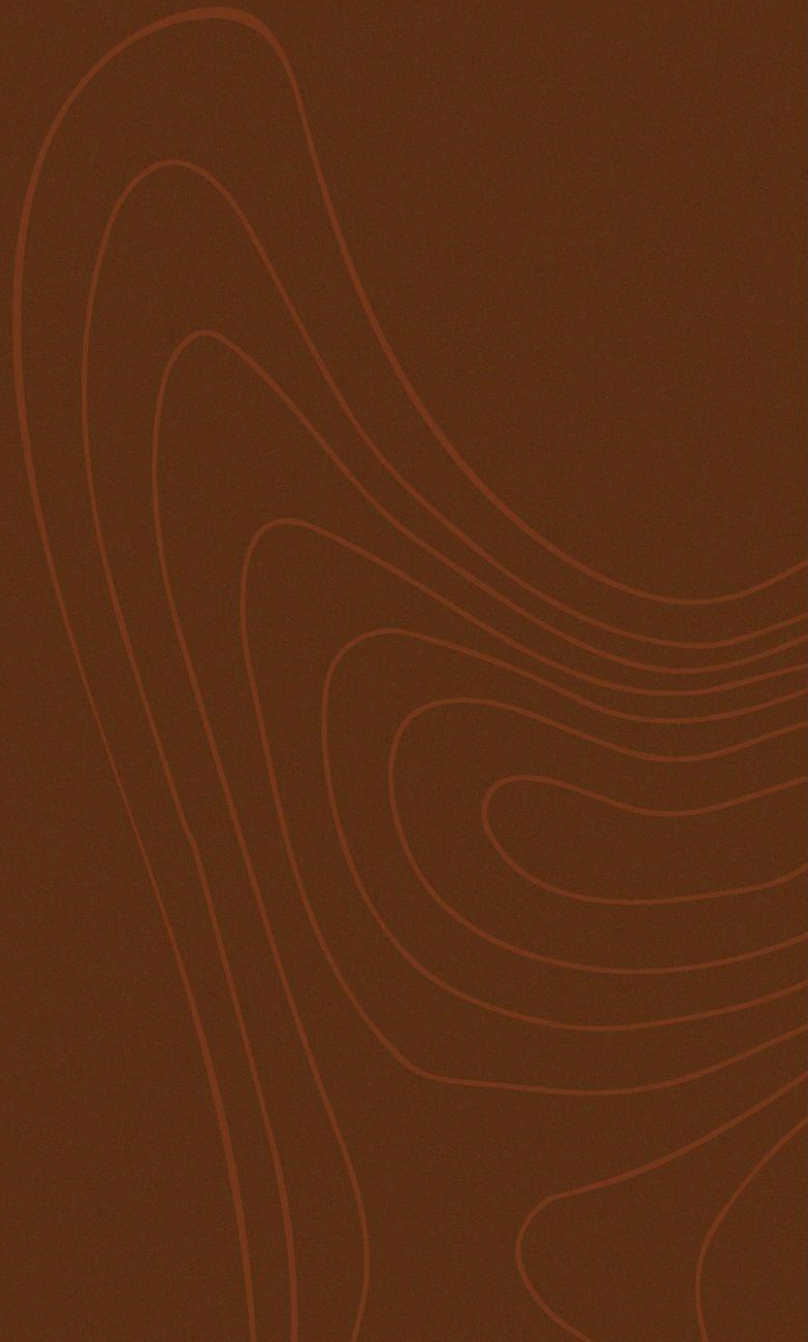
I think it should be 20 to 25% higher. Because it's new technology [and] it's been grown in good environment [without chemicals]. – Mumbai, Female, 26-34 years

For 250, 50 to 70 rupees price {premium, I will pay}. See, I feel going forward it should be cheaper because your waste rate is less. – Bangalore, Male, 36-44 years

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Drivers, Barriers & Enablers of Adoption

Section 4



4.1 Drivers of trial

Consumers' willingness to try cultivated meat is driven by a **combination of functional benefits and reassurance factors**, with protein, health, hygiene, safety, and the absence of animal cruelty emerging as the strongest catalysts.

Fundamentally, consumers are motivated by the nutrition and health benefits of cultivated meat. Over **51% view it as a good source of protein, while 46% perceive it to be healthier than regular meat**, reinforcing a strong health-led appeal. This is further supported by expectations around experience and equivalence, with 42% believing it will taste similar to conventional meat and 37% associating it with a similar or better nutritional profile. Taken together, consumers clearly expect and believe that cultivated meat can deliver the similar protein, vitamins, and nutritional value as regular meat, without the associated risks. The proposition of "all the nutrition minus the antibiotics" is particularly compelling for those who already depend on meat for their primary protein source. Cultivated meat is also seen as a safer and healthier option, free from diseases such as bird flu, while still maintaining the familiar taste and dining experience of conventional meat.

Accessibility and affordability are equally critical drivers, with **44% citing easy availability and affordability** as key enablers. Since meat is an everyday staple for many consumers, they expect cultivated meat to be easily available at nearby stores and priced reasonably to encourage regular consumption.

Trust plays a critical role in driving cultivated meat trials, with consumers seeking multiple layers of reassurance. **43% are more likely to try it if offered by a trusted food brand**, while an equal proportion (43%) look for **approval or certification from food safety authorities**. In addition, **42% are motivated by the assurance of clean and hygienic production**, and **39% value the absence of hormones, antibiotics, or steroids**. These factors collectively highlight that consumers are more inclined to try cultivated meat when it demonstrates **trusted brand endorsement, regulatory validation, and controlled, hygienic production environments**. The possibility of being free from hormones and antibiotics directly addresses concerns associated with conventional meat, strengthening consumer confidence. Furthermore, the idea of meat produced in a **highly controlled and hygienic setting** makes consumers more comfortable with the idea of regular consumption compared to conventional meat bought from traditional butcher shops, which are often associated with concerns around hygiene and freshness.

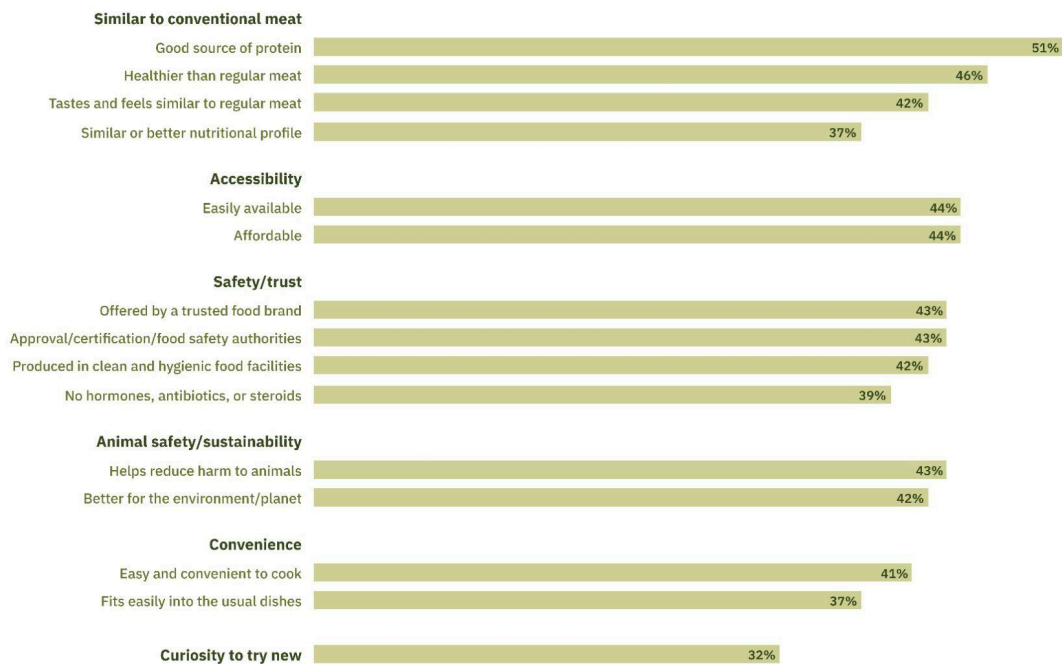
The **elimination of animal slaughter is another strong motivator (43%)**. Cultivated meat offers a way to consume meat in a guilt-free and ethical manner, allowing consumers to continue their existing dietary habits without causing harm to animals. For some, the added benefit of being better for the environment also reinforces this motivation.

From a usability perspective, **41% of consumers value the ease and convenience of cooking**, and **37% appreciate that it can be easily incorporated into everyday dishes**, reinforcing the importance of integration into existing food habits. Additionally, **32% are driven by curiosity to try something new**, further supporting the initial trial.



Which of these will encourage you to consider trying cultivated meat?

Triggers for trial



“ Cultivated meat is highly hygienic and well cleaned. good for consumption and scientifically proven. – Bangalore, Male, 36-44 years

I am tension-free. After eating this chicken, my hormones won't be imbalanced. – Mumbai, Female, 26-35 years

Well, this has the protein, same value, you can easily replace (conventional meat) with it. – Bangalore, Female, 18-25 years

You will get the same source of protein and nutrition level in this meat (as compared to conventional meat). – Mumbai, Female, 26-35 years

We can satisfy our soul...cruelty on animals will be reduced. – Hyderabad, Female, 26-35 years

I'm not losing out on my meat consumption, and plus I'm helping the environment. – Bangalore, Male, 36-44 years

Curious to try, curious to cook, curious to see the taste. – Mumbai, Female, 26-35 years

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4.2 Barriers to adoption

While consumers are largely open to the concept, there are some apprehensions around the concept, primarily centred around **pricing, concerns around the process, sensorial experience, and limitations in cuts and varieties**.

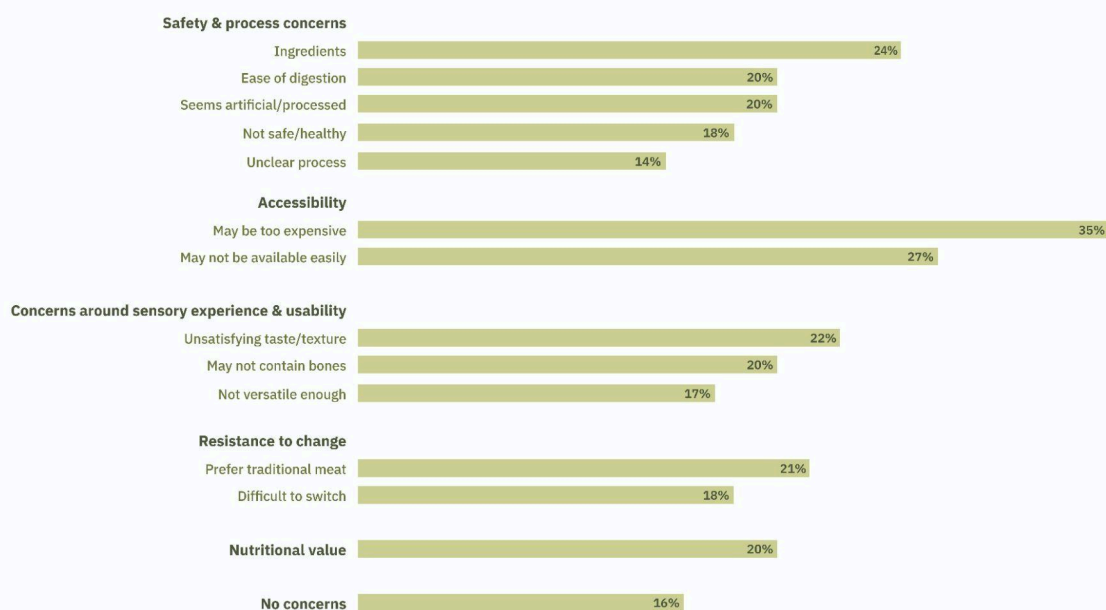
Broadly high **prices and lack of accessibility emerge as the most prominent barriers**. Over **35% of consumers perceive cultivated meat to be too expensive**. Cultivated meat is widely perceived to be priced higher than conventional meat, which limits its suitability for regular consumption. Consumers indicate that if the product is priced at a significant premium, they would not consider incorporating it into their everyday diet. **Availability is another practical constraint, with 27% concerned about** whether cultivated meat will be easily available in nearby stores, hindering regular consumption.

Consumers also raise multiple questions across factors such as **ingredients used (24%), digestibility (20%), whether the product is artificially processed (20%), safety of consumption (18%), and clarity on the production process (14%)**. A few consumers worry that the meat is “artificially made” and may not be easy to digest. There are also apprehensions around allergies and how long the body may take to adapt to this new form of food. These concerns are particularly evident among consumers who do not fully understand the cultivated meat production process, indicating that hesitation stems less from resistance to the concept and more from gaps in understanding of the underlying technology and how the product is made.



Do you have any of these concerns about trying cultivated meat?

Concerns about trying cultivated meat



Product experience is another area of hesitation for some consumers who worry that the **taste and texture of cultivated meat may not match regular meat** (22%), or that the product may **not contain bones** (20%) (which is important for certain dishes), or that it may **not be versatile enough** (17%) to cook a wide variety of meals. Consumers rely on specific cuts such as the drumstick for everyday cooking, and if cultivated meat is only available in generic boneless formats, it may not fit into their existing recipes or cooking routines. They raise questions around whether a wide variety of cultivated meats, including different types of fish and seafood, will be available to support a diverse diet. About 20% of the respondents are also apprehensive about the nutritional value of cultivated meat compared to conventional meat

Over 21% of consumers express a preference for traditional meat and **18% find it difficult to switch** or add cultivated meat to their diet. There is also an expectation of **generational resistance**, with older consumers seen as less open to adopting new food technologies and more inclined to stick to traditional habits such as buying fresh meat from local shops.

“ If the pricing is very high then I won't be able to because I have to consume it daily... All my expense will go into this. – Delhi, Male, 18-25 years

It was looking very scary for me. Like somebody is doing something with the cells, and you have to eat that. If something goes wrong here and there, your body is going to be affected immediately. – Mumbai, Male, 36-44 years

Texture and taste might differ. The aroma might be missing. – Bangalore, Male, 36-44 years

Missing bone pieces. Biryani doesn't taste good if it's boneless. – Delhi, Female, 26-35 years

We can't completely depend on cultured meat. Because even the bone contains so much nutrition ... bone broth, etc. – Bangalore, Female, 18-25 years

”

4.3 Key enablers of trust and adoption

Trust emerges as the single most critical enabler for the adoption of cultivated meat, with consumers seeking multiple layers of validation before they are comfortable trying or consuming the product.

At the forefront are **regulatory approvals and certifications**. Approval from the FSSAI (**14%**) and clear safety certification from recognised third-party agencies (**11%**) are seen as the strongest proof points. These signals provide formal and official assurance of safety and legitimacy, making them foundational to building consumer confidence.

Closely following these is the need for transparency around the product's manufacturing process. Consumers expect **clear explanations of how the product is made (11%)**, along with **easy access to reliable information (11%)** and **clear labelling on product packaging (10%)**. These preferences reflect a strong desire to

understand the process in simple, accessible terms, thereby reducing uncertainty around how cultivated meat is produced.

Beyond institutional trust, endorsements from credible experts and familiar figures also play an important role. Validation from **scientists, doctors, or nutritionists (7%)**, as well as visibility through **well-known chefs or restaurants (7%)**, can help reinforce perceptions of safety. Recommendations from **influencers or food creators (4%)** further reassure consumers, though to a lesser extent.

Brand trust and social validation add another layer of reassurance. Consumers are more comfortable if the product is **launched by a well-known or reputed food brand (9%)**, or if they see **friends accepting it first (8%)**, indicating the importance of both brand credibility and peer influence in driving adoption.

Finally, global validation also contributes to trust, with **7% of consumers finding reassurance in the product already being approved and consumed in other countries**.

Proof points to build trust	
Certification from regulatory bodies	25%
Approval from government food safety authorities (e.g., FSSAI)	14%
Clear safety certification from recognised regulatory bodies	11%
Clear transparency	32%
Clear transparency about how the product is made	11%
Easy access to reliable information about the production process	11%
Clear labelling and information on packaging	10%
Endorsed by known people	18%
If scientists, doctors, or nutritionists endorse it as safe	7%
If well-known chefs or restaurants start serving it	7%
If influencers or food creators recommend it	4%
Launched by a well-known or reputed food brand	9%
If friends accept it first	8%
Already approved and consumed in other countries	7%

“ Within the process, we have to be explained how they are going to do it. I mean, the process and all that has to be shown in the ad. – Hyderabad, Female, 26-35 years

Only if the product is very transparent and everything is approved, then only a clear certification will be there. After that, reputed brands [will offer this meat]. And then the availability in different countries like the US, Singapore, and Israel, etc., [will build trust]. – Hyderabad, Female, 26-35 years

Say, it's been tested in a particular lab or something, [like FSSAI], maybe so that way, we can at least do some research or something backed by which lab or company. Some certification or some kind of known organisation that backs the research—that would increase trust. – Bangalore, Male, 36-44 years

”

4.4 Preferred category terminology

Consumers show a clear preference for certain terms used to describe the category, with more neutral and benefit-oriented language performing significantly better than technical or negatively connoted terminology.

“Cultivated meat” emerges as the most appropriate term, with 85% of consumers rating it as appropriate. This is closely followed by “clean meat” (82%) and “cultured meat” (78%), indicating a strong preference for terms that sound positive, modern, and less technical.

Other terms such as “cell-cultured meat” (75%) and “cell-based meat” (74%) also perform reasonably well, suggesting that consumers are somewhat comfortable though they think that technical terminology lacks the intuitive appeal of simpler terms.

In contrast, “lab-grown meat” (64%) and especially “artificial meat” (53%) perform relatively poorly. According to the consumers, these terms carry the perceptions around **unnaturalness and processing, making them less appealing to consumers.**



Based on the concept you just saw, how appropriate do you find the following terms to describe this kind of meat?

Category nomenclature

