The Asia Protein Buyers 100

An Assessment of Responsible and Sustainable Sourcing





Analysis



4 sectors manufacturers, retailers,

restaurants, hotels



40 indicators across 10 themes assessed

USD563 billion

market cap



10+ Markets



Social

13%

Labour & Just Transition

Out of 23 companies with supplier codes of conduct, only two actually practice due diligence in labor practices throughout their supply chains.

3%

Responsible Antibiotic Use

Only one out of 41 companies prioritises avoiding routine preventive antibiotic use, showing limited awareness of associated risks.

7%

Animal Welfare

Out of eight companies with Animal Welfare policies, only one aligns with FARMS, and three commit to cage-free standards.



Result Highlight



*Note: % indicates average total score across 100 companies.



Environmental

12%

Climate Change

13 companies report emissions, but overlook supply chain emissions in net-zero goals. Four include protein sourcing; two targets are SBTi-validated. 5%

Deforestation & Biodiversity

26 companies recognise deforestation risks, but only two have set deadlines for zerodeforestation in their supply chains. 5%

Protein Diversification

33 companies provide plant-based proteins, but only two have targets to boost sales and appeal to flexitarian consumers.



Governance



Governance

No company disclosed board-level training or expertise on protein responsibility and sustainability.

* Note: % indicates average thematic score across 100 companies

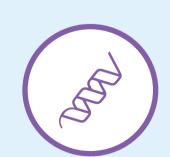
Key Takeaways



Protein buyers to develop and publish policies, targets, and commitments by 2025 that:

- Strengthen governance around protein sustainability, as part of an integrated business strategy.
- Strengthen traceability, transparency, and labour due diligence; protect health and safety via clear principles on responsible antibiotic use.
- Improve animal welfare towards FARMS, starting with policies and cagefree commitments for egg and pork production.
- Ommit to zero-deforestation, to protect biodiversity and help reduce
- emissions.

 Source seafood sustainably, growing the use of independent verification.
- Oiversify further with alternative proteins, setting a sales target to help drive uptake and scale.



Companies can refer to the <u>Asia Protein Transition Platform</u> to support their sustainability journey and reach out to ARE with the confidence of investor-backed engagement.



Buyers, suppliers, investors, and financiers should collaborate, accelerating the implementation of a responsible and sustainable protein transition in Asia by 2030.