



SOUTHEAST ASIA & CHINA MARKET
TRENDS 2023:
MEAT & SEAFOOD

Market Overview



Meat

Market revenue (US\$ billion) and CAGR (%) for meat segment
in Southeast Asia & China, 2023-2028

Southeast Asia Market

US\$92.16B

Revenue in the Meat
segment in 2023¹

8.60%

Market growth
(CAGR 2023-2028)¹

IN-SCOPE: Fresh Meat, Processed Meat & Meat Substitutes

China Market

US\$87.78B

Revenue in the Meat
segment in 2023²

16.76%

Market growth
(CAGR 2023-2028)²

IN-SCOPE: Fresh Meat, Processed Meat & Meat Substitutes

References

¹Statista. (2023). Meat – Southeast Asia. Industry Report.

²Statista. (2023). Meat – China. Industry Report.

Fish & Seafood

Market revenue (US\$ billion) and CAGR (%) for fish & seafood segment in Southeast Asia & China, 2023-2028

Southeast Asia Market

US\$79.11B

Revenue in the Fish & Seafood segment in 2023¹

6.29%

Market growth (CAGR 2023-2028)¹

IN-SCOPE: Fresh and Frozen Fish (whole or part of, such as cuts, fillets), Fresh and Frozen Seafood & Processed Fish and Seafood

China Market

US\$88.09B

Revenue in the Fish & Seafood segment in 2023²

8.06%

Market growth (CAGR 2023-2028)²

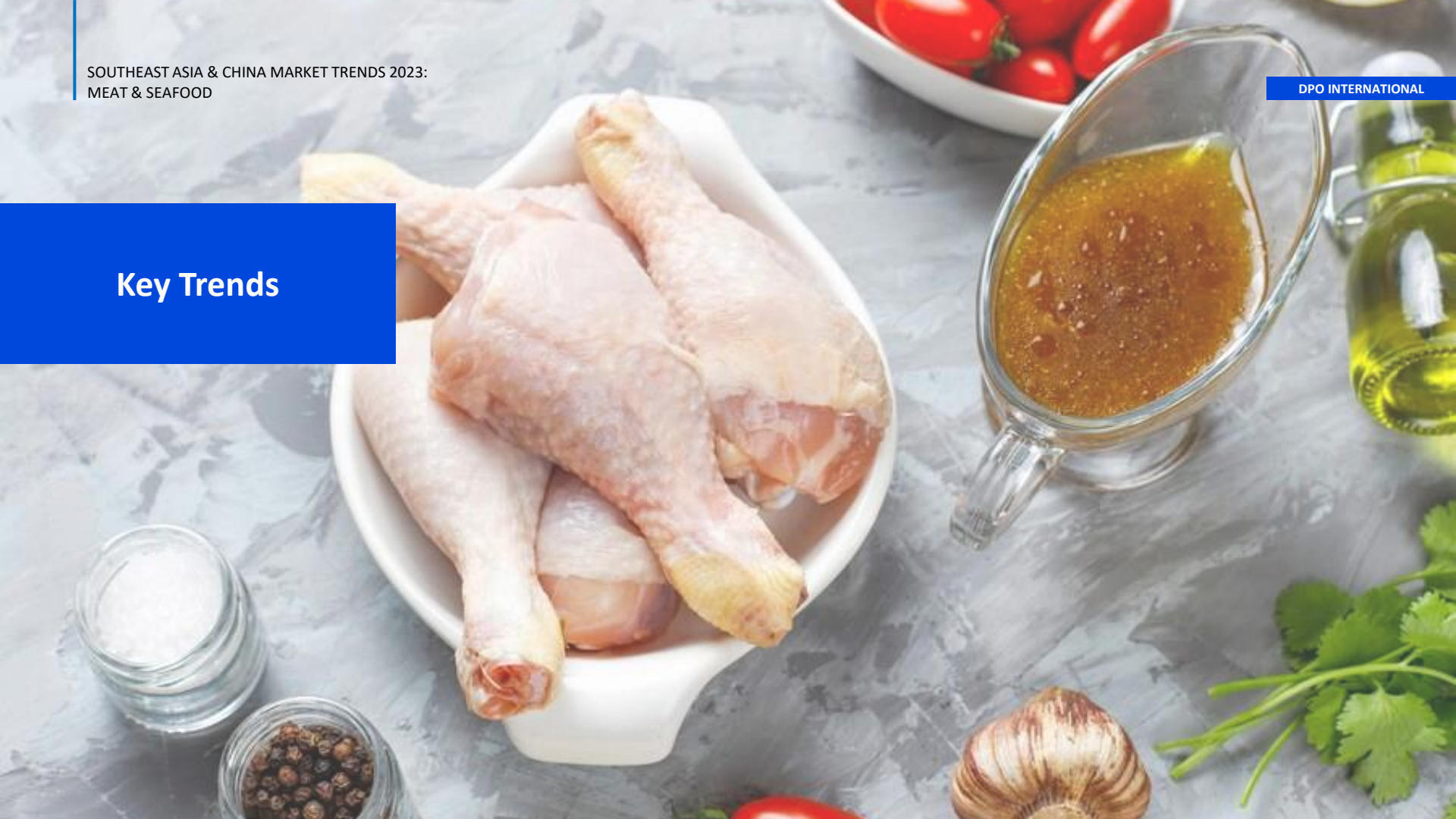
IN-SCOPE: Fresh and Frozen Fish (whole or part of, such as cuts, fillets), Fresh and Frozen Seafood & Processed Fish and Seafood

References

¹Statista. (2023). Fish & Seafood – Southeast Asia. Industry Report.

²Statista. (2023). Fish & Seafood – China. Industry Report.

Key Trends



KEY TRENDS

TO WATCH IN SEA COUNTRIES & CHINA

- #1** Convenience Concept
- #2** Successful Snackification of Meat
- #3** A Journey to 'Real Food'
- #4** Robust Growth of Meat and Seafood Substitutes

Key Trend 1: Convenience

“Demand for convenience is reshaping meat consumption patterns”

In this topic, the trends will be covered for:



Malaysia



Thailand



China

References

¹McKinsey & Company, (2023). For love of meat: Five trends in China that meat executives must grasp.

Key Trend 1: Convenience Concept



Busy lifestyles and work cause Chinese consumers to have little time to cook, so they preferred to buy prepared meat (precooked or fried) and ready-to-eat meals delivered to their homes².



In China, prepared foods, such as canned foods, frozen and refrigerated foods, foods packaged in retort pouches, and meal kits, are known as '*yùzhì cài*'³

Top motivations for purchasing **convenience foods**³:



Reduce preparation time



Good taste

Top reasons Chinese consumers purchase **online**²:

- time savings
- contactless delivery
- greater product selection

Alibaba's Tmall and JD.com are one of the largest e-commerce platforms in China for the meat industry, offering a wide range of meat products from both domestic and foreign suppliers¹.

Type	Features	Examples
Canned goods	Can be eaten immediately after opening the container	Eight treasure congee, sausages, etc.
Pre-cooked retort foods and frozen foods	Can be eaten after heating in microwave or soaking in hot water	Fried rice, beef bowl ingredients, frozen dumplings
Semi-cooked refrigerated and frozen foods	Can be eaten after cooking with enclosed seasonings	Seafood, meat, and others
Meal kits	Pre-cut, refrigerated fresh produce	Seafood, meat, pre-rinsed vegetables

References

¹China Briefing. (2023). Investing in China's Meat Industry: Trends and Opportunities.

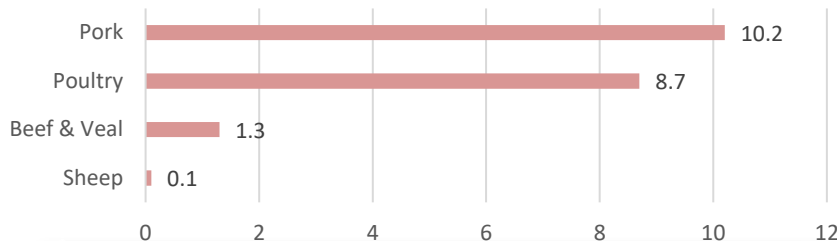
²McKinsey & Company. (2023). For love of meat: Five trends in China that meat executives must grasp.

³MGSSI. (2022). China's Rapidly Growing Consumer Market For Prepared Foods. Industry Report.

Key Trend 1: Convenience Concept



Meat consumption per capita in Thailand in 2023, by type (in kilograms)²



The processed Fish & Seafood market in Thailand amounts to **US\$1.81bn** in 2023 and is expected to grow annually by **5.21%** (CAGR 2023-2028)¹.

Processed Fish & Seafood covers all types:

- Smoked
- Dried
- Canned
- Salted
- Chemical preservatives

Growth of retail, frozen food, e-commerce Industry³

Hectic lifestyle and increasing disposable income in Thailand have increased the demand for **convenience food** such as frozen ready-to-cook food.

Top **e-commerce** retailers in Thailand – Shoppe, Lazada, JIB, etc. The major retail players like Tesco Lotus, 7-Eleven, Tops Super Market, and Big C have expanded nationwide.

References

¹Statista. (2023). Processed Fish & Seafood - Thailand. Industry Report.

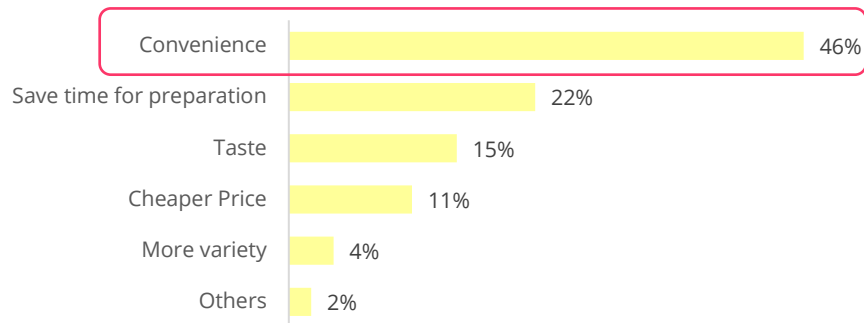
²OECD. (2023). Meat Consumption in Thailand.

³PR Newswire. (2023). Thailand Cold Chain Market is expected to Generate more than THB 20 Bn in 2026F due to Growing Demand for Frozen Food Products, Growth in Food Delivery Business: Ken Research.

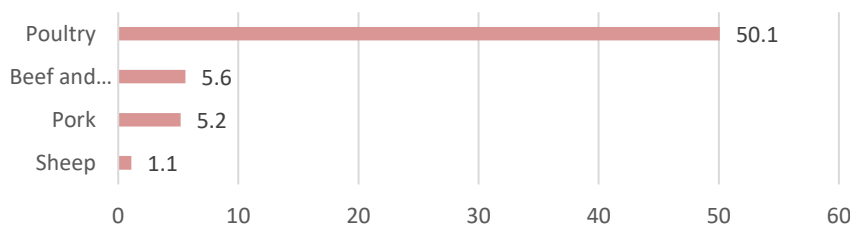
Key Trend 1: Convenience Concept



According to a study among university students and employees in Kuala Lumpur, Malaysia, the biggest motivator for the respondents to purchase RTE food was **convenience** (46%)¹.



**Meat consumption per capita in Malaysia in 2022,
by type (in kilograms)³**



In Malaysia, frozen processed red meat, frozen processed poultry, and frozen processed seafood are strongly growing in the food service market as they provide convenience for consumers².

References

¹Basurra, R. S., R., T., C., K., A., R., M., C., & A., U. (2021). Consumption practices and perception of ready-to-eat food among university students and employees in Kuala Lumpur, Malaysia. Food Research, 5(1), 246–251. [https://doi.org/10.26656/fr.2017.5\(1\).357](https://doi.org/10.26656/fr.2017.5(1).357)

²Euromonitor International. Processed Meat, Seafood and Alternatives To Meat in Malaysia. Nov 2022.

³Statista. (2022). Meat consumption per capita in Malaysia in 2022, by type(in kilograms). Industry Report.

Key Trend 1: Convenience



Haidilao Self-Heating Beef Hot Pot

- Self-heating Hot Pot meals in China not only delicious but also very convenient. This Hot Pot is created by Haidilao, a well-established hot pot restaurant in China, operating in many locations across the globe.
- Self-heating hot pot is convenient and quick when you are at home or going for a trip. It is your top food choice for ski trips, road trips, and more! You only need some water to make the delicious hotpot.
- Flavour: Tomato Flavour
- Product of China

Ingredients:

Pickled Vegetables: Salted Lotus Root, Potato, Black Fungus, Salted Kelp, Salted Bamboo Shoot, Water, Salt, *Citric Acid, *Monosodium Glutamate,) *Potassium Sorbate (Preservative), Disodium Inosinate, Disodium Guanylate.

Hot Pot Seasoning: Tomato Paste, Soybean Oil, Tomato, Tomato Ketchup, Sugar, Salt, Onion, Pickled Ginger, Seasonings, *Monosodium Glutamate, *Citric Acid.

Key Trend 1: Convenience Concept



CP Spicy Drummet Chicken

- Saving time to prepare and enjoy your tasty chicken drumette part in just a few minutes!.
- Product of Malaysia

Ingredients: Chicken Meat, Sugar, Water, Seasoning [Flavour Enhancer (Monosodium Glutamate, Disodium Inosinate And Disodium Guanylate), Lactose, Chicken Fat, Palm Oil, Chicken Flavour (Contains Egg), Anti Caking Agent (Calcium Silicate), Wheat Flour, Acidity Regulator (Lactic Acid, Acetic Acid)], Spices, Salt, BBQ Sauce (BBQ Flavour (Contains Peanut), Colour (Caramel, Paprika), Preservative (Sodium Benzoate)], Emulsifier (Sodium Tripolyphosphate), ***Isolated Soya Protein** And Hydrolysed Soya Protein.

Soy protein is a complete protein as it contains all essential amino acids with good gel-like properties and water holding capacity that are suitable for meat products

References:

Curtain, F., & Grafenauer, S. (2019). Plant-Based Meat Substitutes in the Flexitarian Age: An Audit of Products on Supermarket Shelves. *Nutrients*, 11, 2603. <https://doi.org/10.3390/nu11112603>

Key Trend 1: Convenience



Eaglestar Canned Dace Fish with Salted Black Beans

- Specialty: Vegan
- The leathery dry chewy fried fish soaked in oil infused with fermented black bean umami-saltiness. It tasted savoury-salty with an underlying sweetness from the fish and sugar.
- It is a perfect complement for plain white rice and even better with plain white porridge. The sweet rice or porridge moderates and balances the robust saltiness of the fried dace and fermented black beans.
- Product of China

Ingredients: Dace (Fish), Salted Black Beans, Soybean Oil, Soysauce (Salt, Water, Soybean, Wheat), Water, Salt, Sugar, Spices, **Flavor Enhancer (Sodium Glutamate).*

Key Trend 1: Convenience Concept



Pumpui Pla Yim Fried Baby Clams with Chili Seafood

- Tasty sweet and sour baby clams with a little spicy from chilli.
- With its strong taste, we recommend this recipe to be eaten with rice.
- Product of Thailand.

Ingredients: Baby Clams, Soy Sauce, Sugars, Chili, Soy Bean Oils.

Key Trend 2: Successful Snackification of Meat

” Snacking growth reshapes meat snacks market with nutrition, convenience, and variety.”

In this topic, the trends will be covered for:



Sri Lanka



Vietnam



Philippines



Indonesia

References

¹FMI. (2022). Meat Snacks Market Outlook. Industry Report. .

Key Trend 4: Successful Snackification of Meat



In Vietnam, snacks, meat, fish, and seafood, are one of the highest average revenue per capita amongst food and beverage products.



Snacking in Vietnam is not only a source of indulgence but also a replacement for meals.

Consumers tend to look for snacks that offer more benefits besides physical health and nutritional needs such as meat snacks.

They also look for fewer and simpler ingredients and label claims such as no nitrates and no sugar.



Vietnam company, Funny Group, marketed many snack products, including deep-fried pork skin. Also, in 2015 Vinh Thanh Dat Food Joint Stock Company launched into the market all kinds of instantly processed eggs, such as quail eggs, hidden chicken eggs, and braised duck eggs.

86%

of consumers prioritize portion control and ingredient transparency in snack choices.

References

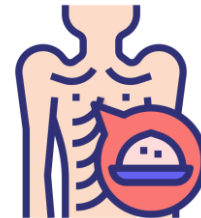
¹Agriculture Canada. (2022). Vietnamese market overview.

²Vietnam Credit. (2022). Vietnam's Snack Market Is The Fastest-growing In Asia.

Key Trend 2: Successful Snackification of Meat



Meat consumption crucial in addressing protein malnutrition in Sri Lanka³.



Health Halo

Consumers demand meat snacks with more functional benefits, and half of the consumers say it is appealing for snacks to be high in protein.

This innovation in meat snacks channels a “health halo” into consumer’s diet because of protein, healthy fat, and other nutritional value added².

Packaged food industry, particularly snacks, witness major consumer demand shift in Sri Lanka due to changing lifestyles, urbanization, and increased customer sophistication¹.



References

¹SEuromonitor International. (2022). Snacks in Sri Lanka. Industry Report.

²Skrovan, S. (2017). Study: Meat, it's what's for snacking as consumer demand sizzles. Food Dive.

³Rajapaksha. R.M.C.R., Madumali, K.A.D.I., Ruwandeepika, H.A.D., & Jayaweera, T.S.P. (2022). An investigation on consumption of meat by undergraduates in Sri Lankan universities. AgInsight.

Key Trend 2: Successful Snackification of Meat



Grass-fed meat snacks are healthier for consumers, animals, and the planet.

The growing demand for meat snacks is well explained through the sustainability messages such as grass-fed³.



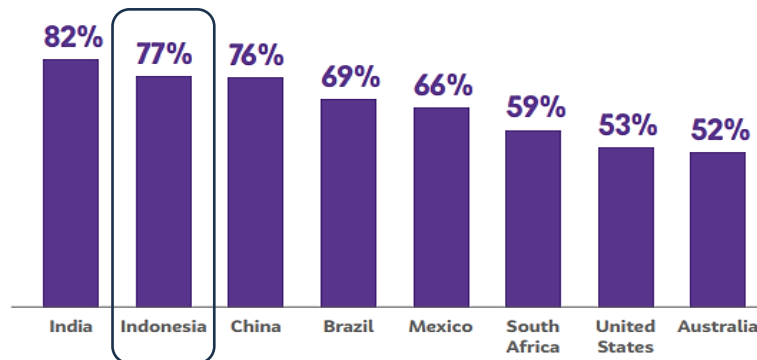
Consumers embrace sustainability messages, favoring regenerative agricultural practices and positioning meat snacks as better for both health and the climate³.

8 out of 10



Filipinos prefer to purchase eco-friendly and sustainable products².

"77% of Indonesian would pay a small carbon tax on a snack to offset the environmental impact of making it"¹



References

¹ Mondelez International. (2022). State Of Snacking 2022 Global Consumer Snacking Trends Study.

² Newsinfo. (2023). Pulse Asia survey: Over 80% Filipino consumers prefer eco-friendly products.

³ New Nutrition Business. (2022). 10 Key Trends in Food, Nutrition & Health 2023.

Key Trend 2: Successful Snackification of Meat



Samphao Thong Satay Fish Snack (Square)

- Made from pure cod fillets, freeze dried into Sweet roasted fish snack. Enjoy anywhere!
- Product of Vietnam.

Ingredients: Fish, Starch, Vegetables, Oils, Sugar, Spices.

Key Trend 2: Successful Snackification of Meat

Slim Jim Original Beef Jerky

- Individually wrapped for a quick and easy meat snack
- Slim Jim meat sticks use spicy beef, pork, and chicken, because beefy appetites require an even beefier snack.
- Product of USA.

Ingredients: Beef, Pork, Mechanically Separated Chicken, Water, Textured Soy Flour, Corn Syrup, Salt, Contains Less Than 2% Of: Natural Flavors, Dextrose, Paprika And Extractives Of Paprika, Hydrolyzed Soy Protein, ***Maltodextrin**, Lactic Acid Starter Culture, ***Barley Malt Extract**, ***Citric Acid**, Soy Lecithin, Sodium Nitrite.



Used as an additive in foods to replace sugar and improve their texture, shelf life, and taste.

Key Trend 2: Successful Snackification of Meat



Shu Dao Xiang Spicy Mushroom And Squid Snack

- Product of China



Jing Zi Jin Zai Spicy Anchovies

- Product of China

Key Trend 2: Successful Snackification of Meat



Nordic Snack Dried Cod Bites

- Made from pure cod fillets, freeze dried into perfect bite size pieces.
- Traditional kelandic healthy snack.
- Each bite is packed with protein, Vitamin B12, Iodine, Magnesium, Phosphorus, Niacin, Folic Acid, and Selenium from a fresh wild-caught Icelandic Cod!
- Product of Iceland.

Ingredients: Dried Wild Icelandic Cod, Sea Salt.

Key Trend 3: A Journey to 'Real Food'

"Consumers prefer real food influenced by evolving science, media, social media, web power, and store choices."

In this topic, the trends will be covered for:



Philippines



Indonesia



Vietnam

Key Trend 3: A Journey to 'Real Food'



A real food which defines as seeking fewer or simpler ingredients, minimal processing, clean label, or free-form are what consumers desired for more than 20 years².

On the other hand, real food is 'something bad' in food and taking it out, including²:

- Artificial additives & preservatives
- Gluten
- Lactose
- Dairy
- Sugar
- Carbs

"Packaged foods expected to be simpler and less processed – and will become more important over the rest of this decade"¹



Vietnamese consumers expect nutritional information on the pack¹

55%

Look at the nutrition information¹

41%

Seek a healthy icon on the pack¹

25%

Seek an organic icon¹

References:

¹Chimigo. (2022). Food and beverage Vietnam. Industry Report.

²New Nutrition Business. (2022). 10 Key Trends in Food, Nutrition & Health 2023.

Key Trend 3: A Journey to 'Real Food'



Filipinos show a preference for nutritious, clean-label foods¹.

A survey carried out by Mintel found that Filipino consumers prioritize their purchasing foods that are high in vitamins and minerals and made with natural ingredients².

They are also aware that these additives, preservatives, and processes extended shelf life can potentially have harmful long-term effects on health¹.



≥ **61%**

Over 61% of consumers check product labels for ingredients used and nutritional content¹.

References

¹Lesaffre. (2023). The Health and Wellness Trend in the Philippines.

²Mintel Mintel Global Consumer. (March 2021). Food and Drinks.

Key Trend 3: A Journey to 'Real Food'



Indonesian to improve a healthy diets

Consumers in Indonesia are paying greater attention to the quality and taste of products where:

92%

of consumers said that the quality of products was important when selecting food and beverages²

80%

look for a clear display of nutritional information on the packaging²

As a result of the increased demand for healthier products, companies are focused on reducing saturated fat, sodium, fat, and sugar, while also geared toward calorie, sodium, and sugar reduction alongside the addition of protein².



Home > NEWS > Meat > Healthy sausage a niche product in Indonesia

Meat

Healthy sausage a niche product in Indonesia¹

By Meliyana - 22 September, 2022, PM

Healthy sausage is a niche product in Indonesia as consumer interest in healthy food is growing. Amalia Nafitri, President Director of sausage producer Sumber Pangan Jaya, said Indonesians are now more discerning and choosing healthier food items. "This is driving us to produce healthy sausages. Since 2009, our formulation contains no preservatives, coloring, and MSG," she told *Asian Agribiz*. The company sells beef, chicken, and cheese sausages under the Bulaf, Gut, and Yamaso brands. To address parents' concerns about nutrition, it also offers vegetable sausages for kids.

TAGS healthy sausage MSG niche market

References

¹Asian Agribiz. (2022). Healthy sausage a niche product in Indonesia.

²Euromeat News. (2023). Indonesian consumer looks for quality and taste – survey.

Key Trend 3: A Journey to 'Real Food'

Ocean Fresh Delite Frozen IQF Black Tiger Prawn - Shell On

- IQF Black tiger prawn is a healthier choice where it is lower in sodium and saturated fat.
- Product of Vietnam

Ingredients: Black Tiger Prawn



Key Trend 3: A Journey to 'Real Food'



Seawaves Frozen Chunky Tempura Fish Bites

- Selecting only the best fillets of fish, our bites are moist and flaky with a coat of crispy tempura.
- Made with 100% fish fillet.
- No added preservatives.
- Product of Indonesia

Ingredients: Fish Fillets, Buttermilk, Sugar, Garlic, Salt, Raising Agents, ***Whole Egg Powder**, Flavour Enhancer, Water, Vegetable Palm Oil.

Key Trend 3: A Journey to 'Real Food'



Seawaves Frozen Chunky Tempura Fish Bites

- Enjoy Brunswick® Sardine Fillets by themselves or on crackers, over salad, rice, or pasta.
- High Protein, High Vitamin D, Gluten Free, Trans Fat Free, 2.6g Omega-3 Polyunsaturates per Serving.
- No Additives, No Preservatives.
- Product of Canada.

Ingredients: Sardine fillets – *Clupea harengus* – FISH (89%), Soybean oil (11%).

Key Trend 3: A Journey to 'Real Food'

BULAF Chicken Corn Sausage

- BULAF Chicken Corn Sausage with the corn mix can be an option to get around children who are reluctant to eat vegetables.
- Safe for children to consume.
- Product of Indonesia



Key Trend 4: Robust Growth of Meat and Seafood Substitutes

“Eating less meat is not only better for your health but also for the environment. With so many options to choose from, finding vegan meat substitutes that fit your needs should be straightforward.”

In this topic, the trends will be covered for:



Thailand



Sri Lanka



Malaysia



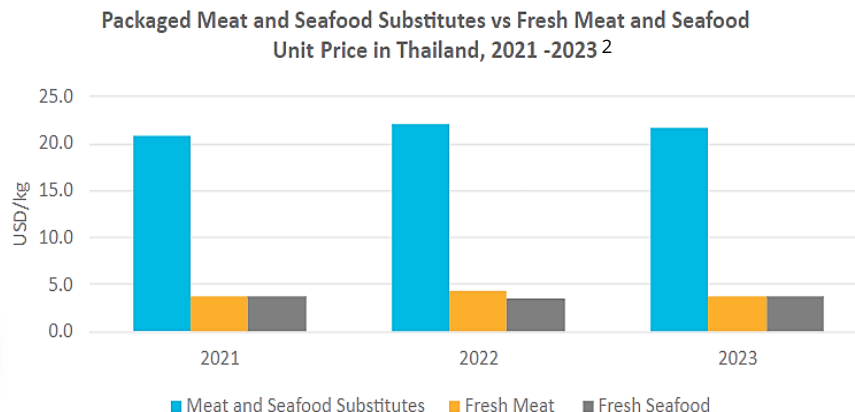
China

Key Trend 4: Robust Growth of Meat and Seafood Substitutes



In recent years the alternative meat products, made from plant protein, are gaining more popularity among Thai consumers.

With the growth of innovative plant-based meat substitute products in Thailand, more business operators, both big and small, are now joining in. As of 2022, at least 16 major brands of alternative meat products are already on the market in Thailand¹.



Future innovations in cultivated meat

Cultivated or lab-grown meat is an emerging innovation where meat protein is artificially grown from animal tissues in a lab, mimicking normal cell and muscle growth. Scientists collect stem cells and grow meat samples in a laboratory.¹



References

¹Earth Journalism Network. (2022). The Rise (and Rise) of Alternative Meat in Thailand.

²Euromonitor International. (2023). Meeting Plant-Based Demand in China and Southeast Asia.

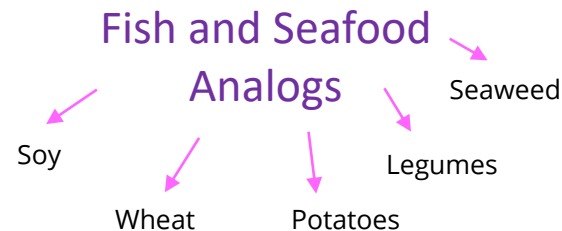
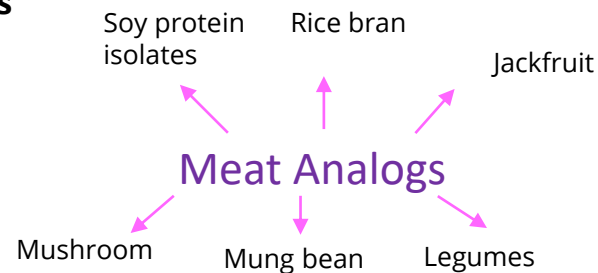
Key Trend 4: Robust Growth of Meat and Seafood Substitutes



Necessities of Introducing Plant-based Analogues to Sri Lanka

As animal-based products become more expensive in Sri Lanka, many people are turning to plant-based alternatives to meet their dietary needs. Plant-based foods offer an affordable and sustainable strategy for food security, fulfilling basic dietary requirements economically and environmentally.

Meat and fish analogs are plant-based food products that can mimic the nutritional and sensorial properties of real meat and fish products.



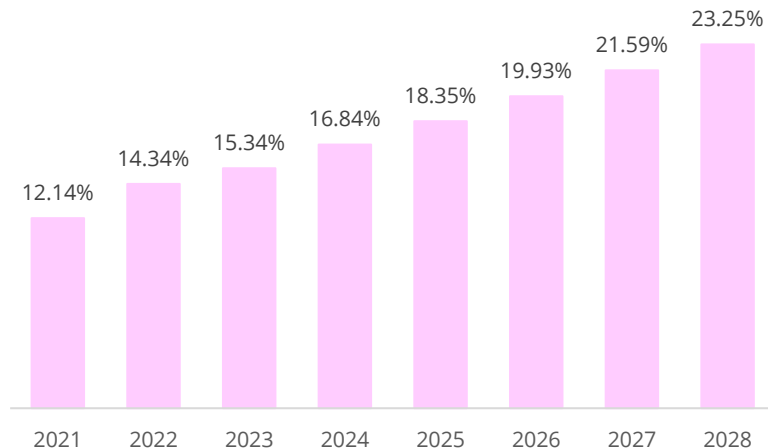
References

¹Earth Silva, M. & Senanayeke, C. (2023). Meat, Fish and Milk Analogues as Future Foods in Sri Lanka.
https://www.researchgate.net/publication/368207183_Meat_Fish_and_Milk_Analogues_as_Future_Foods_in_Sri_Lanka

Key Trend 4: Robust Growth of Meat and Seafood Substitutes



Revenue of meat substitutes in Malaysia, 2023-2028



The demand for plant-based food is expanding in Malaysia due to growing middle class and flexitarian group who always look for delicious alternative protein sources.

Moreover, consumers are consuming less meat to improve their health and well-being.

In Malaysia, revenue for Meat Substitutes market was valued at US\$15.34m in 2023. The market is expected to grow annually by 8.67% (CAGR 2023-2028).



References

¹DOSM, Mirage. (October 2022). Growing interest in plant-based protein products in Malaysia create export potential.

²Statista. (2023). Meat Substitutes - Malaysia.

Key Trend 4: Robust Growth of Meat and Seafood Substitutes



Health concerns push for lower meat intake in China¹

In China, chronic health problems, such as obesity, diabetes, and high blood pressure, have risen significantly in recent years.

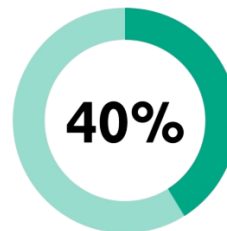
“Flexitarian” are not fully committed to neither veganism nor vegetarianism but are willing to reduce their meat consumption due to cultural factors and health concerns.

On the other hand, increase in awareness about meat’s negative impact on personal and planetary health tend to make consumers more likely to consider plant-based options.

28%



of Chinese consumers say they plan to reduce their pork consumption¹.



of the Chinese consumers were actively reducing their meat consumption³.



References

¹McKinsey & Company. (2023). For love of meat: Five trends in China that meat executives must grasp.

²Ortega, D. L., Sun, J., & Lin, W. (2022). Identity labels as an instrument to reduce meat demand and encourage consumption of plant based and cultured meat alternatives in China. Food Policy, 111, 102307. <https://doi.org/10.1016/j.foodpol.2022.102307>

³Vegconomist. (2022). Study: Almost 40% of Chinese Consumers Eating Less Meat, But Many Unaware of Plant-Based Alternatives.

Key Trend 4: Robust Growth of Meat and Seafood Substitutes

Fry's Chicken-style Nuggets

- Each delicious Chicken-Style Nugget is carefully shaped into a bite-sized chunk and evenly coated with crumbs before pre-cooking.
- Serve these vegan nuggets with a creamy dip or for a tasty treat, serve with spicy potato wedges or fried chips.
- Product of Malaysia .

Ingredients: Crumb: Wheat Flour, Yeast, Improving Agent (***Vitamin C**), Sunflower Oil. Nugget: Vegetable Protein (11%) (Soy, Wheat), Wheat Flour, Flavours, Maize Starch, ***Yeast Extract**, Plant Fibre, Thickener (Methyl Cellulose), Salt, Rosemary, Marjoram, Sage, Mustard Seeds, Anti-caking Agent (E551), Garlic.



Yeast extract (YE) is a natural seasoning, rich in protein and also enriched with flavor precursors (non-volatile compounds).

Key Trend 4: Robust Growth of Meat and Seafood Substitutes

Future Farm Sausages

- Future Sausage has nothing to hide: no GMO's, no gluten, no antibiotics and nothing artificial.
- Inside our plant-based links is our signature triple-protein blend of soy, pea and chickpea with familiar ingredients you'd find in any pantry.
- Product of Malaysia .

Ingredients: Water, Vegetable Protein, Concentrated Soy Protein, Isolated Soy Protein, Concentrated Pea Protein, Chickpea Flour, Coconut Oil, Modified Food Starch, Salt, Beet Powder (for color), Natural Flavor, Sugar, Onion, Garlic, White Pepper, Methylcellulose, Carrageenan, Spices, ***Ascorbic Acid** (for freshness).



Key Trend 4: Robust Growth of Meat and Seafood Substitutes

Whole Perfect Vegan Smoke Sausage

- Perfect Vegan Smoke Sausage is made of soy and konjac.
- Product of China.

Ingredients: *Isolated Soy Protein, Water, Vegetable Oil, Konjac Powder, Fermented Soy Sauce (containing caramel), Salt, Sugar, White Pepper, Spices.



Key Trend 4: Robust Growth of Meat and Seafood Substitutes

Omg Fish Nugget Style Plant-based

- For health enthusiasts seeking a plant-based protein alternative to fish nuggets, OMG Meat Plant-Based Fish Nugget Style provides a delectable taste reminiscent of traditional fish nuggets, without any added sugar.
- Product of Thailand.





To know more about the featured ingredients in this market trends report as well as how you can create better food products for your consumers, contact our Food & Beverage Intelligence (FBI) team.

Email: info@dpointernational.com

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