EVOLVING APPETITES: AN IN-DEPTH LOOK AT ATTITUDES TOWARDS PLANT-BASED EATING.

German Market

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Evolving appetites: an in-depth look at attitudes towards plant-based eating in Germany

Executive Summary

This report sheds light on an ongoing shift in German eating habits, with 59% of German meat eaters self-reporting a reduction in their annual meat intake, up from 51% in 2021. Health concerns (cited by 49% of respondents), animal welfare (39%, the second-highest result in the selected EU countries[1]), and ecological reasons (30%) emerge as the most influential factors driving this change, with each of these reasons achieving a higher percentage in Germany than the EU average.[1]

In terms of dietary habits, 40% of Germans identify as flexitarians, an increase of 10 percentage points compared to 2021, and the highest percentage among the European countries surveyed.[2] When looking at which plant-based foods are being embraced by German consumers, the data suggests that legumes are the most popular option when it comes to replacing animal-based foods in the future (40%), followed by plant-based dairy alternatives (36%) and legume-based foods (34%). However, the most important influencing factors are that plant-based foods are tasty (55%), affordable (50%), and healthy (44%).

Looking at perceptions around trust, 42% of Germans said that they trust plant-based alternatives more than they did three years ago. This is mostly because they are considered accurately labelled, of high quality, and safe to consume. When compared to other sources of protein, plant-based proteins are perceived as the most trustworthy core ingredients for alternative products, followed by cultivated proteins (e.g. cultivated meat, cultivated dairy) and fungi (e.g. mushroom, mycelium, yeast). Cultivated protein stands out as the protein source with the greatest increase in trust among the German population in the last two years (an increase of 9 percentage points), and also showed the biggest increase in all of the 10 European countries surveyed. In Germany, along with seven of the other countries, supermarkets are the main purchase location for plant-based alternatives.

Consumers want to see more plant-based options across the board, with plant-based sweets and snacks being most in demand. Most people intend eating plant-based foods most frequently at home in the future and look for information about those foods on digital media. When looking for accurate information about plant-based food, 43% of respondents trust online sources such as search engines the most, followed by health and nutrition-society websites (39%). The study also reflects an urgent need for policy action in Europe's food sector. A substantial 57% of German consumers would like to see more transparency in product certification, while 54% are in support of food products that promote a healthier lifestyle being zero-rated in terms of tax.

In summary, the data suggests an ongoing shift in Germany towards more plant-based eating. In order to further accelerate this shift, a multifaceted strategy is needed. This strategy should include emphasising the long-term health benefits of plant-based diets, tailoring messaging for diverse generations, implementing transparent and trustworthy labelling schemes, and, most crucially, ensuring that plant-based products are easily accessible. It's also important to responsibly leverage the influence of social media in guiding consumer purchase decisions.

Finally, the current momentum behind cultivated foods in Germany[3] presents an opportunity for food manufacturers to capitalise on the demand for healthier and more sustainable foods. By responding to consumer concerns and behavioural shifts, the move to plant-based eating can be further accelerated, contributing to a healthier and more sustainable future.

1, 2) The selected EU countries are: Austria, Denmark, France, Germany, Italy, The Netherlands, Poland, Romania, Spain and the UK.
3) Only Danes trust cultivated foods more within the range of the selected EU countries.

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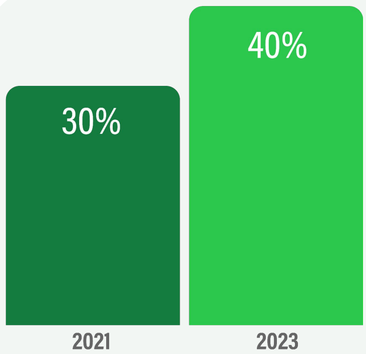
Key differences compared to 2021

In comparison to the results of the 2021 report,[4] three key developments in Germany are evident:

40% of consumers identify as flexitarians, an increase of 10 percentage points compared to 2021, representing 33% growth.

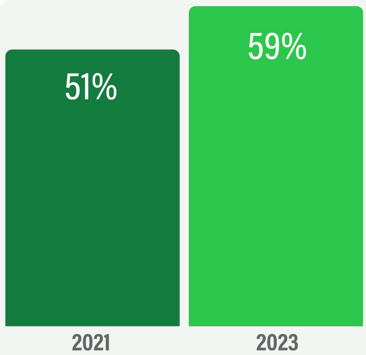
59% of omnivores and flexitarians in Germany said that they were eating less meat than they were a year ago, compared to 51% in 2021.

Cultivated protein is the alternative-protein category that has shown the greatest increase in trust among German consumers in the last two years.



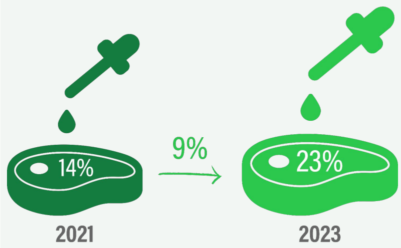
Consumers who identify as flexitarians

Fig. 1: Share of consumers who identify as flexitarians in Germany in 2021 and 2023 | Q3: Which category best describes your current dietary lifestyle? | Single choice | n=750



Flexitarians and omnivores who eat less meat compared to a year ago

Fig. 2: Share of meat consumers who are actively reducing their meat consumption | Q8: Compared to a year ago, how much meat (e.g. beef, pork, chicken) are you eating now? | Single choice | n=639



Trust in cultivated protein

Fig. 3: Trust of consumers in cultivated protein in 2021 and 2023 | Q21: Which of the following alternative proteins do you trust the most? Rank them from 1 (trust the most) to 5 (trust the least) | Single choice | n=750

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4) 'What consumers want: A survey on European consumer attitudes towards plant-based foods. Country specific insights' European Union's Horizon 2020 research and innovation programme (No 862957) (2021).

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Survey methodology

Survey

- Conducted online by Innova Market Insights
- 20-minute-long questionnaire
- Conducted in June 2023, as a follow-up to the previous survey conducted in June 2021, the results of which are used in this report in order to compare changes in behaviours and attitudes over the last two years.

Participants

- 750, all over the age of 18
- 20% of participants in each age group
    - 18-24 years old
    - 25-34 years old
    - 35-44 years old
    - 45-54 years old
    - 55-70 years old
- 49,6% men, 49,7% women and 0,7% other
- Only consumers who are responsible for household grocery shopping participated

Changes in consumer attitudes and behaviours in Germany

Mapping the target groups

50% of Germans claim to follow a non-meat-based dietary lifestyle (flexitarian, vegan, and vegetarian). **Flexitarians** are once again the second-largest consumer group (**40%**) in Germany.

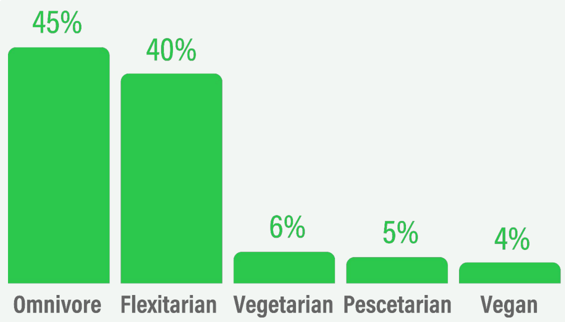

Fig. 4: Consumer groups sorted by dietary lifestyle | Q3: Which category best describes your current dietary lifestyle? | Single choice | n=750

In terms of self-predicted future consumption habits, German consumers are most likely to frequently purchase plant-based alternatives at **supermarkets** (62%) and **discounters** (46%), followed by organic supermarkets (21%), drug stores (18%), and farmers' markets (15%).

Most respondents say that they will most frequently consume plant-based alternatives at home (64%). When eating out, there is a slightly stronger preference for restaurants that serve both animal- and plant-based (17%) meals, compared to restaurants that serve only plant-based meals (15%).

When looking for information about plant-based food products, search engines (43%) and health and nutrition websites (39%) are the most trusted by consumers.

The majority of respondents trust that plant-based food alternatives are accurately labelled, authentic, fully traceable back to their origin, honest, of high quality, reliable, safe, trustworthy, truthful and have integrity (at least 42% agreement for each item). Accurate labelling (55%), high quality (53%), and safety (52%) stand out with the highest levels of agreement.

Changes in consumer attitudes and behaviours in Germany

Mapping the target groups

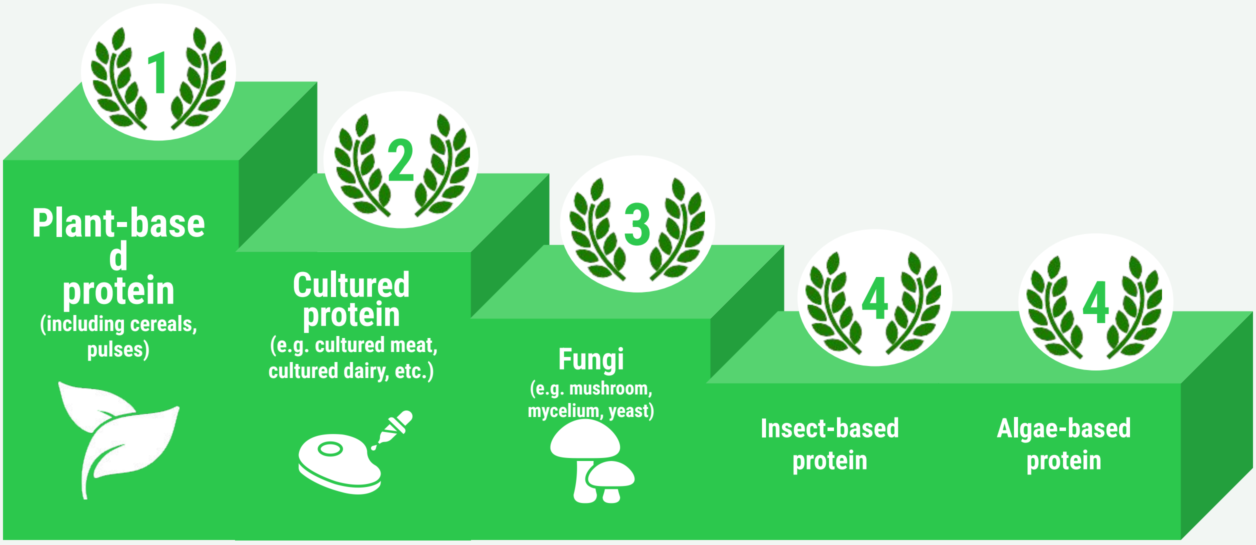

Fig. 5: Most trusted plant-based protein sources | Q21: Which of the following alternative proteins do you trust the most? Rank them from 1 (trust the most) to 5 (trust the least). | Single choice | n=750

Plant-based proteins are the most-trusted alternative proteins (39%, compared to 45% in 2021) followed by cultivated (23%, 14% in 2021), fungi (17%, 14% in 2021), and insect-based and algae-based proteins (both 10%, compared to 14% in 2021). Overall, **42% of Germans trust plant-based alternatives more** than they did three years ago.

Changes in consumer attitudes and behaviours in Germany

Mapping the target groups

According to recent research studies,[5] people find themselves at various stages of readiness and motivation when considering changes to their dietary habits. As such, **gaining insight into the psychological stages** that people navigate when making changes to their eating patterns **enables the development of personalised support systems, targeted interventions, and more effective goal-setting strategies**. The transition stages mentioned below are derived from the Transtheoretical Model (TTM), which provides a useful framework for understanding and interpreting human behaviour.[6]

Dietary-transition stages (total sample, percentages):

Outsiders
32%
"No one in my social environment (including myself) eats plant-based meals or thinks about adopting a plant-based diet."

Deniers
19%
"Some people in my social environment think I should eat mostly plant-based meals, but I don't want to change."

Reachable
23%
"I realize the importance of a plant-based diet, but I'm not sure that I'm ready to change."

Considerers
9%
"I plan to start a plant-based diet in the next six months."

Committed
4%
"I have taken definite actions to adopt a plant-based diet in the past six months."

Won
5%
"I feel confident about maintaining my plant-based diet for six months or longer."

Flight risk
4%
"I am working to maintain a plant-based diet but it is getting more challenging every day."

Lapsed
4%
"I had a plant-based diet but I lost interest/ motivation."

Fig. 6: Share of different dietary transition stages within the German population | Q5: Which of the following phrases best describes your current dietary habits or situation? | Single choice | n=750

Knowing how these stages are spread across the German population is useful when it comes to designing stage-matched interventions. Nearly a quarter of Germans (23%) are at the reachable stage, which means that they are open to changing their diets, although they need support and encouragement, which can be provided, for example, by providing plant-based alternatives at point of sale. Such support also helps people at the 'considerers', 'committed', 'won', and 'flight risk' stages to continue eating plant-based foods (combined: 22%). And even some 'lapsed', 'outsiders' and 'deniers' might be won over with the right strategy (combined: 55%).

5) J O Prochaska 1, W F Velicer.: The transtheoretical model of health behaviour change. https://pubmed.ncbi.nlm.nih.gov/
6) Nahrain Raihan; Mark Cogburn.:Stages of Change Theory. https://www.ncbi.nlm.nih.gov/books/NBK556005/

Changes in consumer attitudes and behaviours in Germany

Mapping the target groups

When asked about their overall eating habits, 64% of German consumers say that they consume legumes at least occasionally (22% regularly, 42% occasionally), followed by plant-based milk (43%) and plant-based yoghurt and plant-based meat (both 39%). Very few German consumers are familiar with seitan and tempeh, and even fewer people consume them.

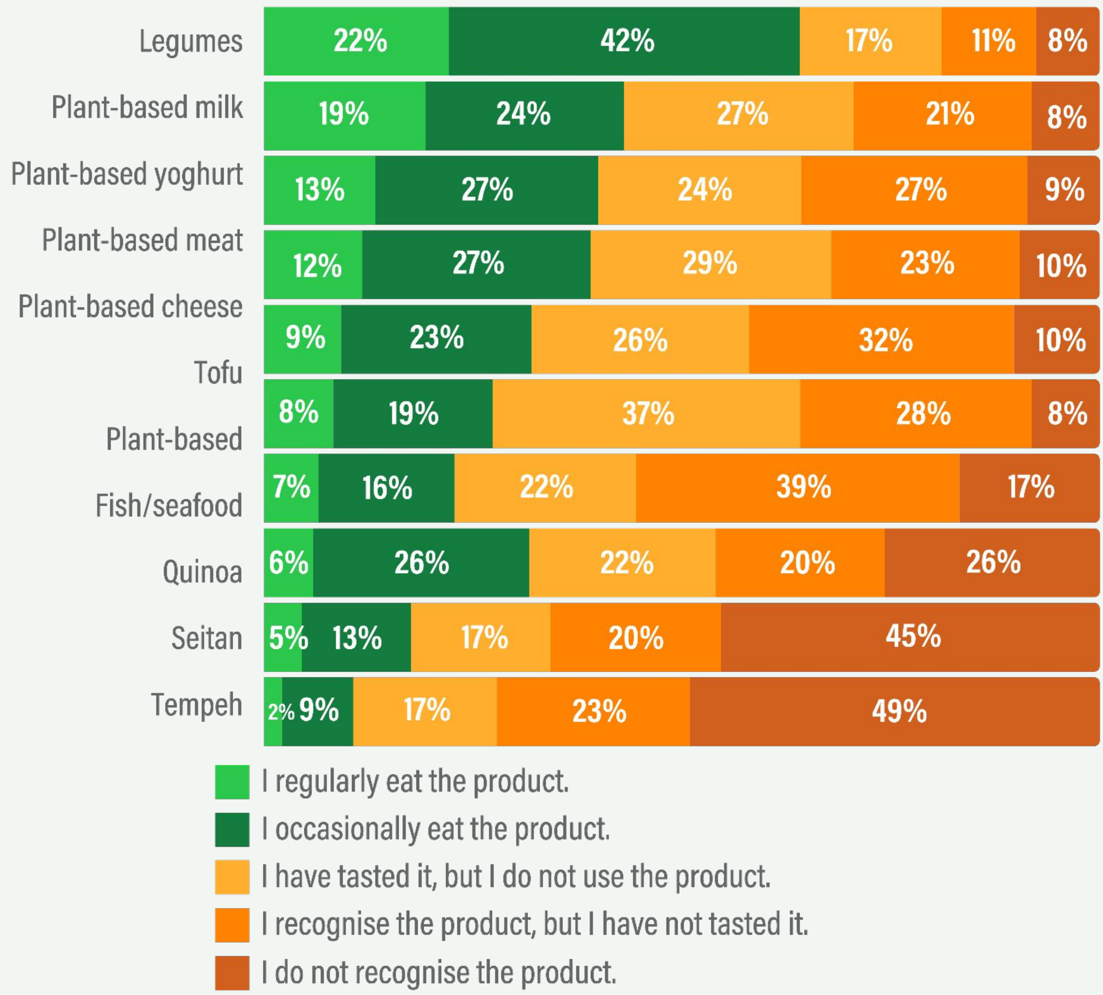

Fig. 7: Familiarity with certain plant-based foods |
Q6: How familiar are you with the following food products? | Single choice | n=750

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Changes in consumer attitudes and behaviours in Germany

Motivators and barriers

Motivation to decrease meat and dairy consumption (among meat reducers)

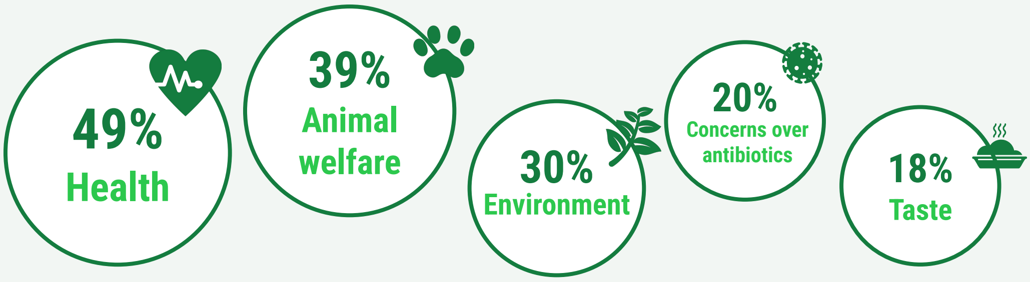

Fig. 8: Motivators for reducing the consumption of animal-based foods | Q10: Which of the following reasons best describe why you have chosen to decrease your consumption of meat or dairy products? | Multiple choice | n=376

Health is the primary motivator for reducing meat consumption in Germany (49%), followed by animal welfare (39%) and the environment (30%).

Drivers for choosing plant-based alternatives (total sample)

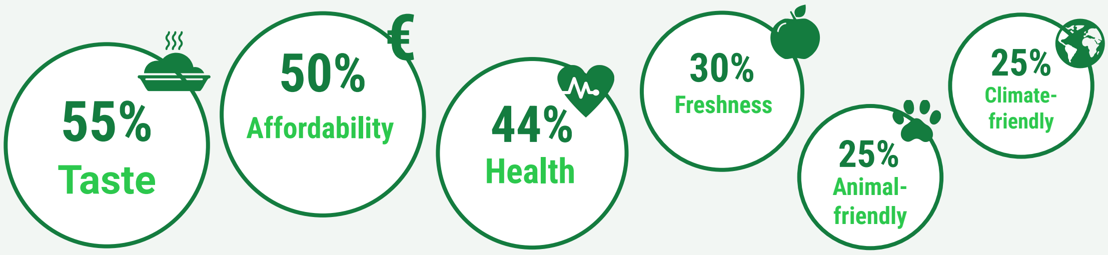

Fig. 9: Drivers for choosing plant-based alternatives | Q14: What are the most important factors when choosing plant-based food alternatives? | Multiple choice (max. 5) | n=750

When it comes to buying plant-based alternatives, consumer's purchase decisions are centred around taste (55%), affordability (50%), and health (44%).

This is supported by the fact that, when making their food choices, price is generally the most important consideration for most people (19% strongly agree)[7] but taste is nearly as important (18%). In comparison, naturalness, and the level of processing are less important (10%).

The majority of consumers find eating plant-based food alternatives enjoyable, tasty and good for their health. They also think that a plant-based diet can help them to lose weight or stop gaining weight, and that is has a lower impact on the environment (at least 37% agreement for each item). However, it is the positive impact on health and the reduction of negative environmental effects that stand out, with 47% agreement.

7) In Q25 respondents had to indicate their agreement to nine different statements. Always three of them stated either something about taste, price or naturalness/ unprocessedness. The three statements around price had the highest average approval rating ('strongly agree').

Changes in consumer attitudes and behaviours in Germany

Motivators and barriers

Barriers that hinder the consumption of plant-based alternatives:

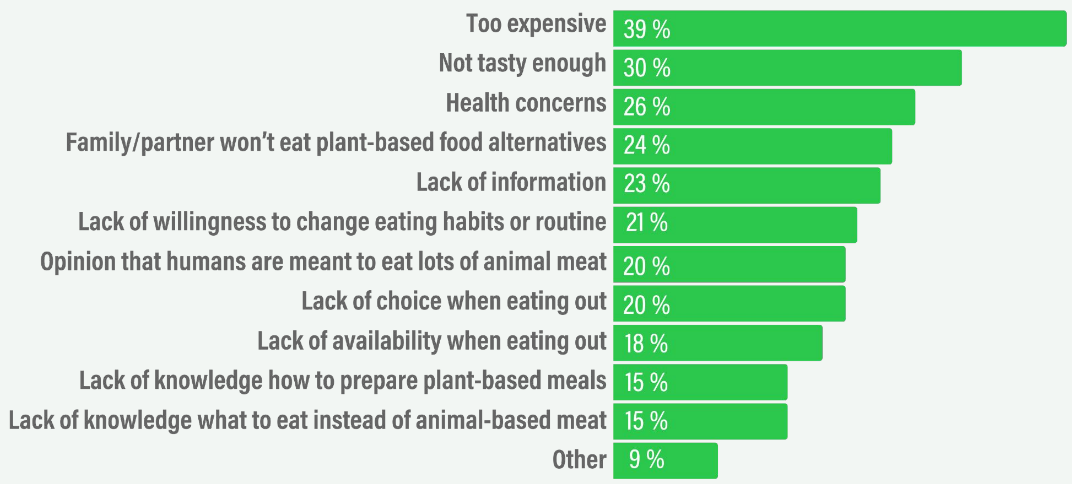

Fig. 10: Barriers that hinder the consumption of plant-based alternatives | Q15: Which of the following do you encounter as barriers when choosing plant-based food alternatives? | Multiple choice (max. 5) | n=750

When looking at barriers to choosing plant-based alternatives, price emerges as the most prominent reason not to opt for such products, with **39% of respondents expressing concern about affordability**. These financial considerations and perceptions could potentially be a significant hindrance to widespread adoption of plant-based diets, regardless of whether plant-based food items are actually more expensive than their animal-based equivalents or if it is simply an issue of perceptions. As echoed elsewhere in the survey results, the majority of respondents think that plant-based alternatives are not affordable, not easy to obtain at discounted prices, and not on sale often enough.

In August this year, ProVeg released a study comparing the prices of plant-based alternatives and their animal-based counterparts at German retail stores, which confirmed consumers' perceptions. You can read about the results **here**.

Another crucial factor, when it comes to choosing plant-based alternatives is taste, with **30% of respondents indicating that they are not being tasty enough**. Additionally, more than one in four respondents **(26%) expressed concern about the health aspects** – beyond iron and protein – of exclusively consuming plant-based alternatives. Lastly, family members or partners who won't eat plant-based alternatives (24%) and a lack of information about plant-based foods (23%) are two other key barriers to choosing plant-based alternatives.

Changes in consumer attitudes and behaviours in Germany

Attitudes towards different categories of plant-based alternatives

What consumers would like to see more of in the future:

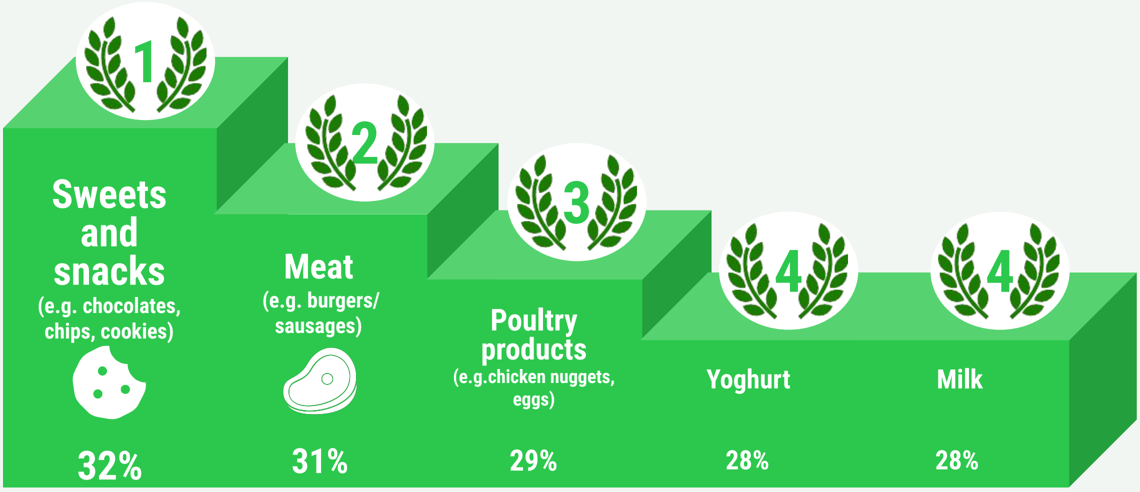

Fig. 11: Most requested plant-based products | Q18: What kind of plant-based food alternative(s) do you wish you could buy more often in the supermarket or at points of consumption (e.g restaurants, cafes, etc.)? | Multiple choice | n=750

The majority of Germans want policymakers to increase standards for transparency in product certifications (57%) and remove taxes on food that supports a healthier lifestyle (54%).

A significant proportion of respondents (40%) intend replacing animal-based foods in their diet with unprocessed legumes (e.g. chickpeas, lentils) in the next six months (total results for 'strongly agree', 'agree', and 'somewhat agree'). Following a few percentage points behind are legume-based foods (e.g. tofu, hummus, soya burgers) at 34% and plant-based alternatives to dairy (36%) and meat (33%). At the same time, the largest share of **respondents 'strongly agree' that they are likely to consume plant-based dairy as an alternative within the next six months**.

More than half (**59%**) of omnivores and flexitarians in Germany said that they **ate less meat** compared to a year before. Nearly half of them say that they have **reduced** their **pork consumption** (48%) and one in five say that they have reduced their **beef consumption** (23%). More than one in three respondents (**36%**) say that they intend consuming **more plant-based meat alternatives** in the next six months.

Just less than four in 10 respondents (38%) intend consuming **more plant-based dairy alternatives** in the next six months, while **47%** of respondents intend consuming **more legumes** (e.g. chickpeas, lentils) and **34%** plan on **increasing their consumption of legume-based foods** (e.g. tofu, hummus, soya burgers) in the next six months.

Market opportunities

German Market

Focus on the magic triangle of price, taste and health: plant-based foods should always be equally or more tasty and available at an equal or lower price than their animal-based counterparts, while having a natural ingredient list that offers nutritional benefits.

Consumers want more sweets and snacks, but meat and dairy alternatives are still a big deal: make more plant-based sweets and snacks available at point of sale so that they can compete with their animal-based counterparts. Consumers would also like to see a greater selection of plant-based meat (such as burgers and sausages) and poultry products (such as chicken nuggets and eggs).

Get ready for cultivated protein: keep your eyes on the development of cultivated products and get in touch with relevant stakeholders in the early stages so as not to fall behind in the future. We can connect you with our colleagues from the ProVeg Incubator, who are helping to accelerate the sector.

Label products clearly: the V-Label is trusted and widely recognised by consumers. We can connect you with our colleagues from the V-Label if you would like to learn more about this topic.

Provide recipes: by providing recipes that help consumers to use your products correctly in various dishes, you increase the likelihood of repeat purchases.

Transparency creates trust: provide proof that your products are environmentally friendly and healthy by using certifications that demonstrate improved traceability. Only share content that originates from reputable sources and, when necessary, is backed by credible certification. Make sure that facts you share via social media are always science-based.

Proactively promote your products: initiate campaigns and influencer collaborations that prominently feature plant-based dishes.

Key takeaways

German Market

1. **Nearly one in six (59%) meat consumers in Germany self report that they have continued to reduce their yearly meat intake**. This marks an eight percentage-point increase, compared to two years ago. Germans are reducing mostly their consumption of pork (48%, the highest in the EU) and beef (23%).
2. **Germany has the highest share of flexitarians** (40%) of the European countries surveyed. This share grew by 10 percentage points in the last 2 years.
3. **Drivers and barriers** – health concerns (49%) are by far the most common reason for people to reduce their meat or dairy consumption, followed by animal welfare (39%) and protection of the environment (30%). Perceptions around price (39%), taste (30%), and health (26%) continue to be key barriers for many consumers when choosing plant-based alternatives.
4. Many German consumers **plan to replace animal-based foods with legumes** (40%) and plant-based dairy alternatives (36%) or legume-based foods (34%), with 62% intending to purchase plant-based alternatives at supermarkets, and 46% at discounters. Most respondents say that they will consume plant-based food alternatives most frequently at home (64%) in the future.
5. Plant-based sweets and snacks (e.g chocolate, chips, and cookies) are the **most-requested items** in stores and consumption locations (32%), followed by plant-based meat items (31%) such as burgers and sausages, and poultry products (29%) such as chicken nuggets and eggs.
6. **42% of Germans trust plant-based alternatives more than they did three years ago**.
7. **Consumers trust plant-based protein sources the most**, followed by protein from cultivated and fungi sources. Cultivated protein is the alternative-protein category that has shown the greatest increase in trust among the German population in the last two years (+ 9%). German consumers trust plant-based alternatives specifically because of their accurate labelling (55%), high quality (53%), and safety (52%).
8. **The majority of Germans want policymakers to increase standards for transparency in product certifications (57%) and remove taxes on food that supports a healthier lifestyle (54%)**.