

# What consumers want:

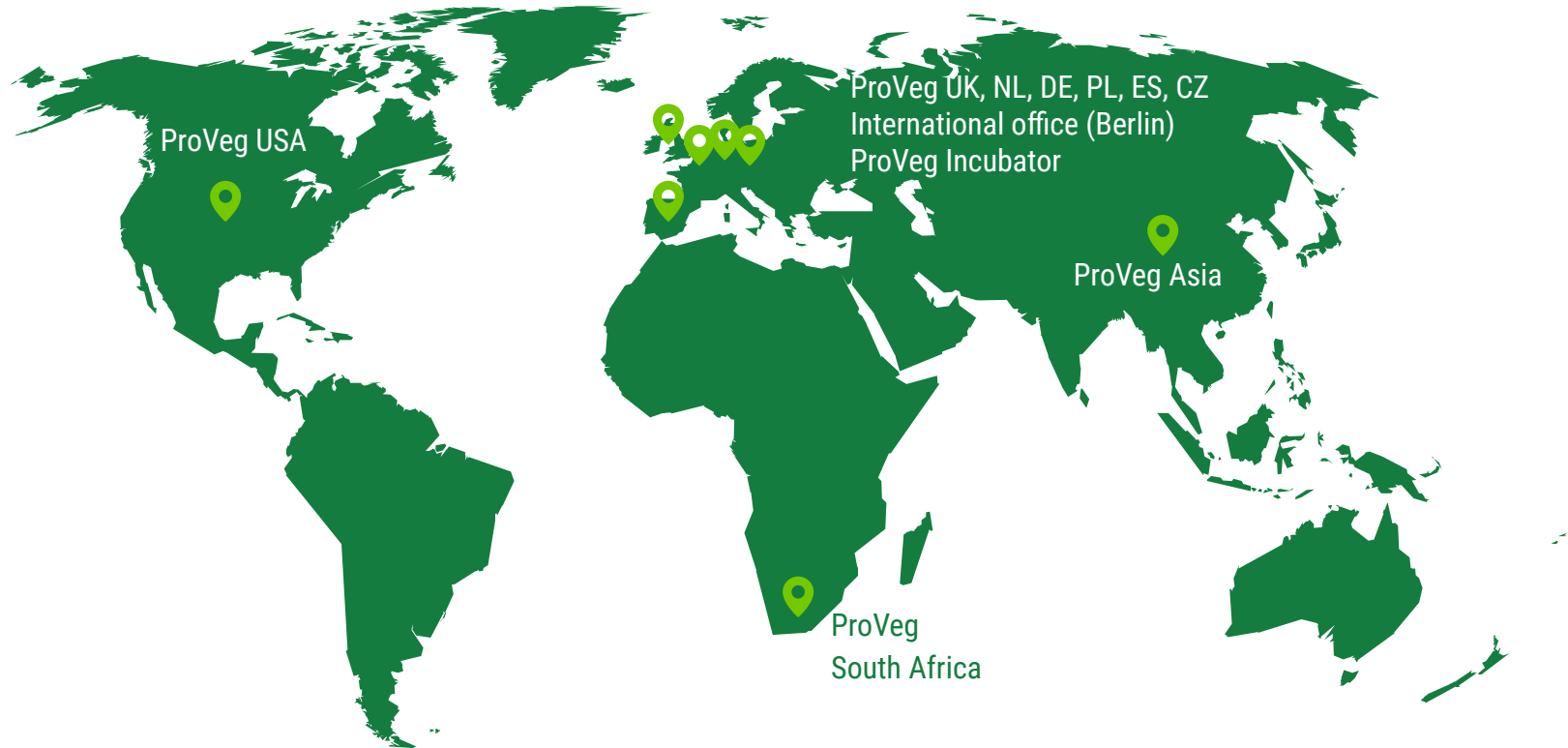
A survey on European consumer attitudes towards plant-based foods, with a focus on flexitarians

November 16th 2021

[www.smartproteinproject.eu](http://www.smartproteinproject.eu)



# ProVeg International is a food awareness organisation working to transform the global food system





## OUR MISSION


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Reducing the global consumption of animals by 50% by the year 2040.

## OUR VISION

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We strive for a world where everyone chooses delicious and healthy food that is good for all humans, animals, and our planet.



# Action areas



## Advancing plant-based and cultured-food innovation

We support and connect startups and global partners in advancing plant-based and cultured-food innovation.



## Institutional and corporate engagement

We influence and support businesses, decision-makers, and institutions in developing, providing, and promoting healthy, compassionate, and sustainable plant-based options.



## Policy and advocacy

We work with governmental and intergovernmental agencies, NGOs, and researchers to create plant-forward policies and practices.



## Movement building

We build strong, collaborative networks by empowering and supporting other NGOs, alliances, advocacy groups, and communities.



## Public education and media

We provide inspiration and support to reduce and eliminate animal products from people's diets.

# Working with companies across the value chain



# Our network

## OUR B2B COMMUNITY

**12,058+**

subscribers across  
our international  
newsletters

**400+**

Delegates at our New  
Food Conference  
2021

**45+**

startups supported  
by the ProVeg  
Incubator

**14,258+**

LinkedIn followers

ProVeg received

**1,650**

Media mentions  
in 2020



## OUR B2C COMMUNITY

**23,000+**

consumers across  
our test community

**88,000+**

followers across our  
international  
Instagram accounts

**410,000+**

subscribers across  
our international  
newsletters

**450,000+**

people signed up for  
the Veggie Challenge  
so far

# Trusted by industry leaders



# Supporting companies



**INFORM FUTURE PRODUCT-DEVELOPMENT STRATEGY**

**EXPAND AND IMPROVE PLANT-BASED PRODUCT OFFERINGS**

**DEVELOP BRANDING AND MERCHANDISING STRATEGY**

**ENHANCE CONSUMER AWARENESS, EDUCATION, AND ENGAGEMENT**

**AMPLIFY CSR ACTIVITIES**



# What is the Smart Protein Project?

One of the most **innovative** plant-based projects

A collaboration of **33 partners** from more than **20 countries**

**4 years** in duration (2020-2024)

An **EU-funded research project** (Horizon 2020) with a €9+ million budget

**Objective:** *innovative, cost-effective, and resource-efficient EU-produced plant proteins from:*



chickpeas, lentils,  
quinoa, and fava beans

***Innovative protein***  
*products from plants*



yeast and fungi

***New protein***  
***ingredients***



byproducts of  
pasta, bread, and beer

***A circular economy*** will  
*be created by upcycling*  
*side streams*

# Presenters of today's webinar



**Dr Kai-Brit  
Bechtold**

Senior Consumer Research  
Scientist at ProVeg



**Stephanie  
Jaczniakowska-McGirr**

International Head of  
Food Industry and Retail at ProVeg



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# Some examples of the exciting developments in the plant-based sector in Europe

## McDonalds

launches **McPlant** across  
Austria in August 2021



## Migros

launched the first plant-based  
hard boiled egg **V-Love The  
Boiled** in Switzerland in  
November 2021



## Lindt

has launched an  
**oat-milk-based Santa**  
for this year's holiday  
season



# Content

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  2. Results
    - a. Current consumption situation and outlook
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    - c. Spotlight on flexitarians
    - d. Supermarkets and discount stores are favoured shopping locations
    - e. Search engines and health and nutrition society websites are the leading channels for finding out about plant-based foods
  3. Eight key insights and the way forward
  4. Q&A

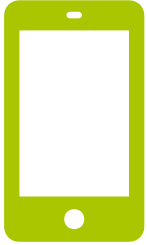
# 1. Introduction

*"European consumers' appetite for plant-based foods is here to stay, as shown by the number of Europeans who say they want to eat more plant-based alternatives to dairy and meat in the future."*

VINCIANE PATELOU

Director, ENSA-European Plant-based Foods Association

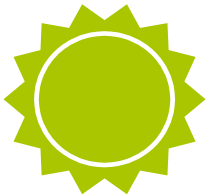
# Consumer survey



Online survey conducted  
by Innova Market Insights



20-minute-long questionnaire



June 2021

# Research objectives



Readiness to embrace a plant-based diet



Current habits



Key drivers of food choices



Trust towards plant-based foods



Future shopping location and current online communication behaviour

# 10 countries in Europe



Total (7,590 respondents)



Austria (757 respondents)



Denmark (773 respondents)



France (750 respondents)



Germany (757 respondents)



Italy (759 respondents)



The Netherlands (750 respondents)



Poland (757 respondents)



Romania (754 respondents)



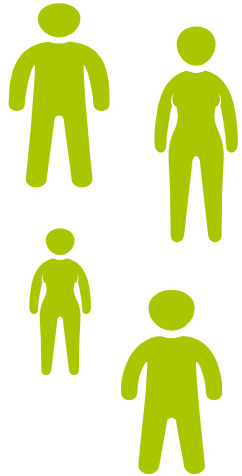
Spain (774 respondents)



United Kingdom (759 respondents)



# Age and gender



18-24 years old

25-34 years old

35-44 years old

45-54 years old

55-70 years old

20% of participants  
in each age group

Female

Male

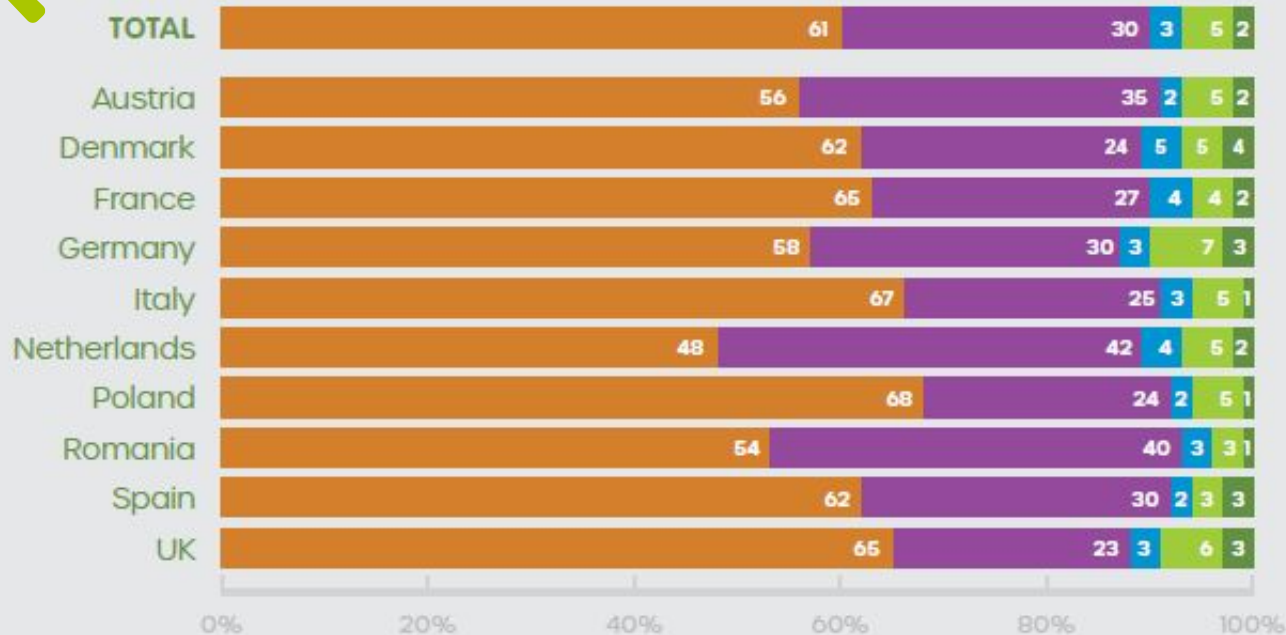
50% men and 50% women

→ Only consumers who are responsible for household grocery shopping participated

# Following a flexitarian or plant-based diet is the new normal



Dietary lifestyle by country



- Omnivore**  
(I frequently eat meat, such as beef, pork, chicken, turkey, fish and/or shellfish)
- Flexitarian**  
(I sometimes eat meat, but I am trying to reduce my meat consumption and often choose plant-based foods instead)
- Pescetarian**  
(I eat fish and/or shellfish, but no other types of meat)
- Vegetarian**  
(I don't eat meat and fish of any kind, but I do eat eggs and/or dairy products)
- Vegan**  
(I don't eat meat, fish, eggs, dairy products, or any other animal-based ingredients)

## 2. Results

*"The survey underlines one of the key trends of our time and confirms us in defining plant-based foods as a relevant topic for ALDI Nord."*

CHRISTOPH GEORGIUS

*Business Unit Director Corporate Responsibility and Quality Assurance  
International, ALDI Nord*

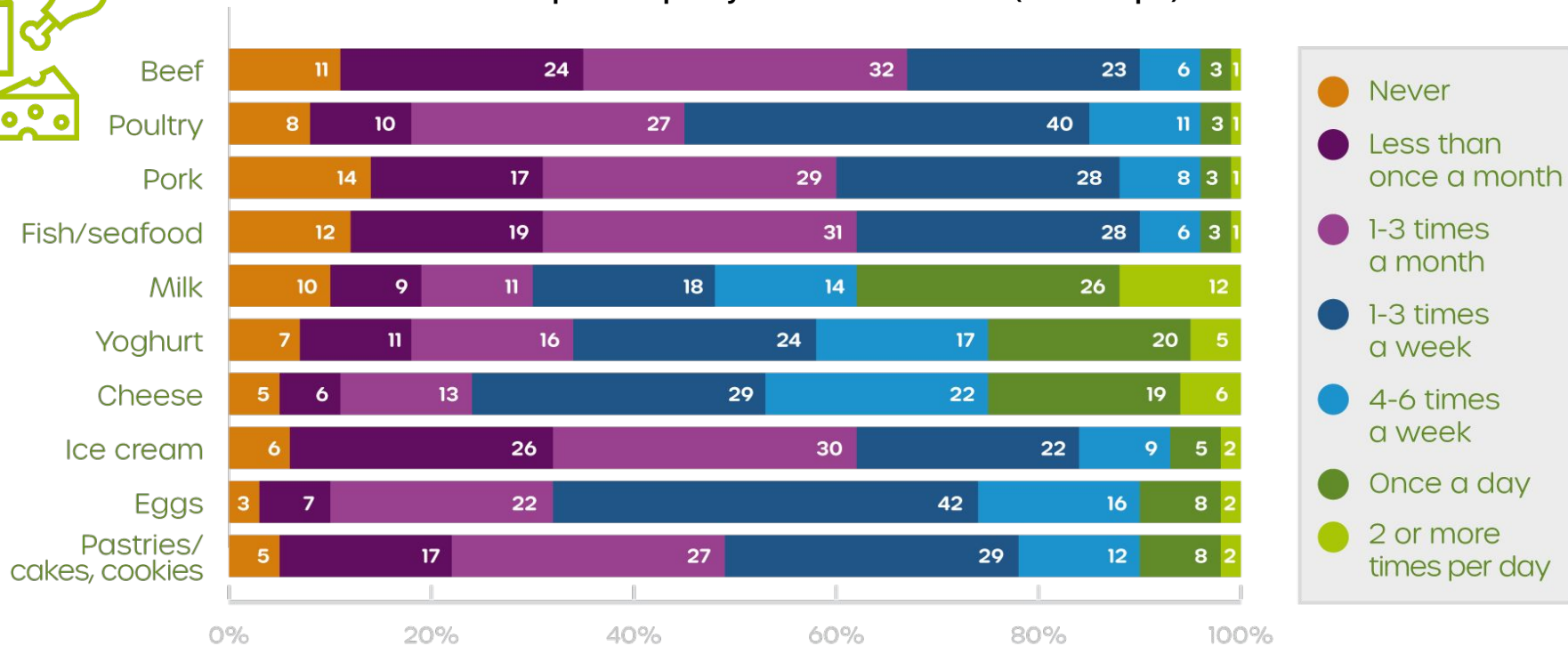
# Current consumption situation and outlook



# Cheese, eggs, milk, and yoghurt are the most often consumed. Poultry is the leading meat category

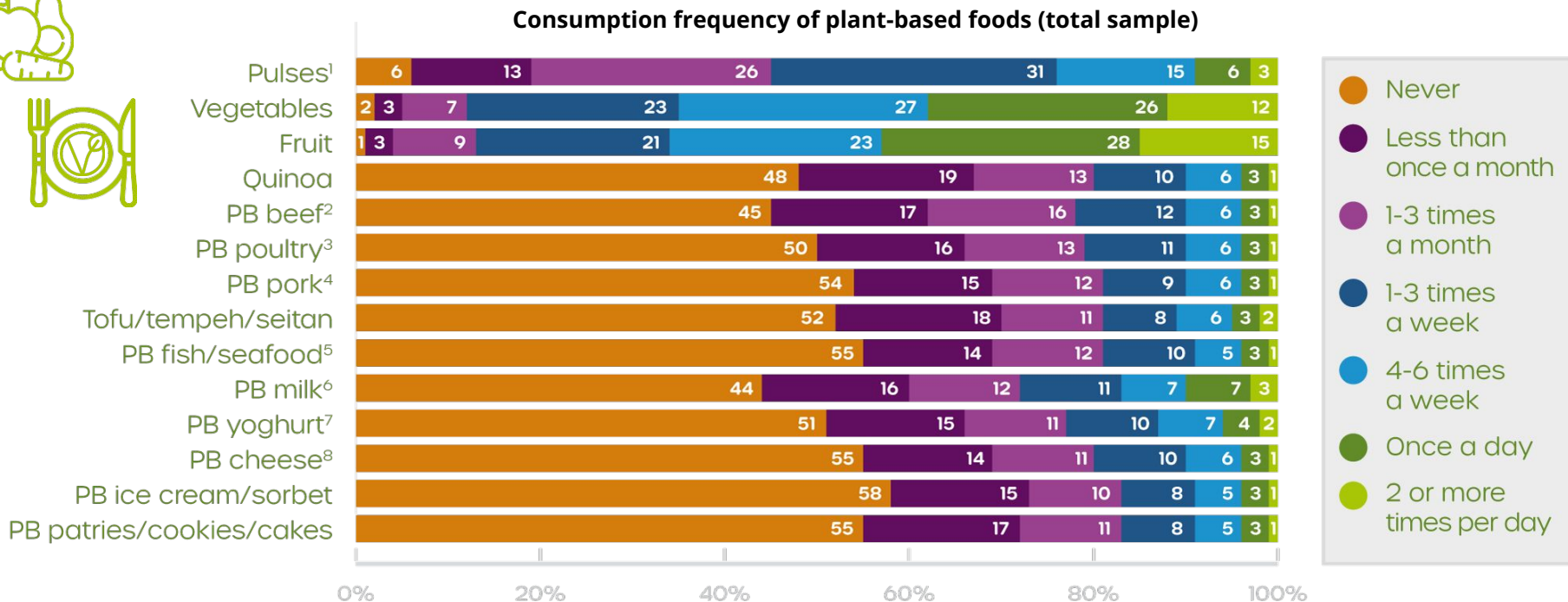


Consumption frequency of animal-based foods (total sample)



Question: Which statement best describes how frequently you have consumed the following foods in the last 12 months? | Single choice

# Plant-based milk is the most consumed plant-based food product, followed by plant-based beef and yoghurt



Question: Which statement best describes how frequently you have consumed the following foods in the last 12 months? | Single selection  
 Examples: 1: lentils, beans 2: PB burger/mince 3: PB chicken strips/chunks 4: PB sausage/pulled pork 5: PB fish sticks/fish burger/tuna 6: soya almond/oat/coconut/rice/pea milk  
 7: soya/almond/oat/coconut yoghurt 8: PB cream cheese/cheese slices/grated cheese

## Poll: Meat consumption

Compared to a year ago,  
how much meat are you eating now?



# 46% have already reduced their meat consumption



Actual meat consumption vs a year ago (omnivores and flexitarians)

<b>A lot less</b>	<b>14%</b>
<b>Slightly less</b>	<b>32%</b>
No change	48%
Slightly more	5%
A lot more	1%

**46%** of consumers are eating **less meat** than a year ago.



# Almost 40% intend consuming fewer meat products and almost 30% also plan to reduce their dairy consumption



## Future consumption of animal-based products

	Dairy products (e.g. milk, yoghurt, cheese)	Meat products (e.g. beef, pork, chicken)
<b>I will consume less</b>	<b>10%</b>	<b>11%</b>
<b>I will consume a little less</b>	<b>18%</b>	<b>28%</b>
I will consume about the same	64%	55%
I will consume a little more	6%	5%
I will consume more	2%	2%

# Almost 30% will consume more plant-based dairy and meat products



## Future consumption of plant-based products

	<b>PB dairy products</b> (e.g. soya/oat milk, coconut yoghurt)	<b>PB meat products</b> (e.g. pb burgers/sausages)
I will consume less	11%	11%
I will consume a little less	11%	11%
I will consume about the same	52%	53%
<b>I will consume a little more</b>	<b>20%</b>	<b>19%</b>
<b>I will consume more</b>	<b>6%</b>	<b>6%</b>

Question: Do you intend increasing or reducing your consumption of the following plant-based food categories in the next 6 months? | Single choice

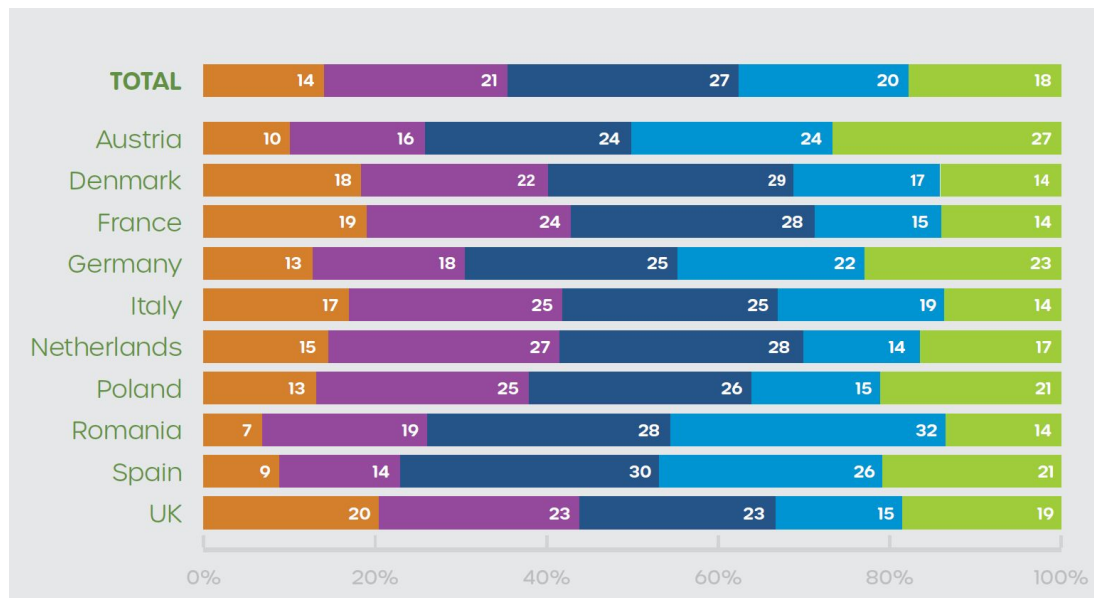
# Readiness to consume plant-based foods: a country comparison with a focus on plant-based meat, cheese, and baked goods



# Austrian consumers are most likely to try plant-based meat



Likelihood of trying plant-based meat



Top country

Austria



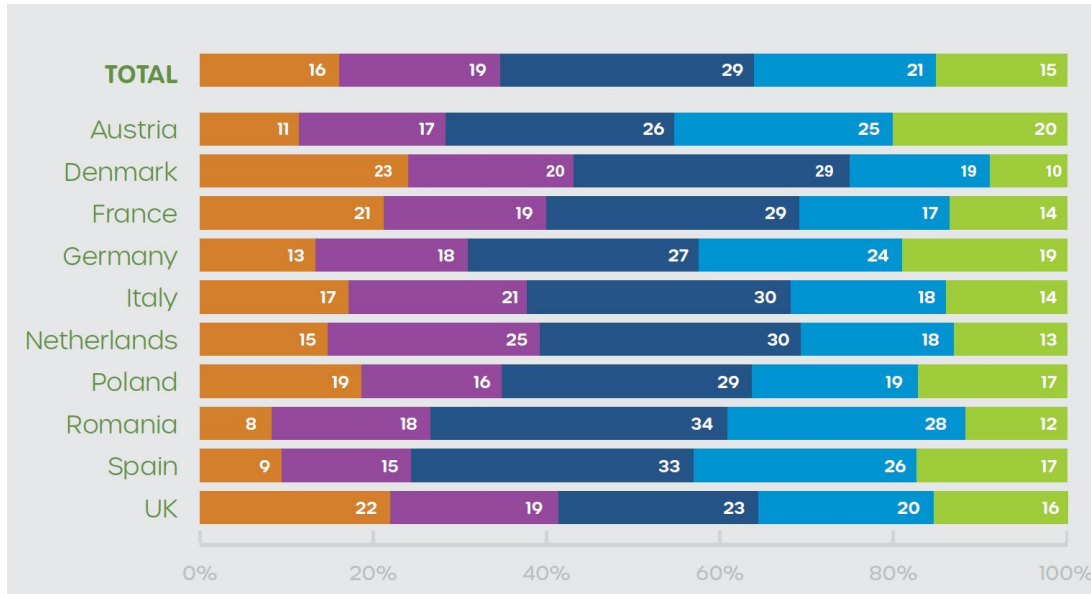
- Not at all likely
- Somewhat likely
- Moderately likely
- Very likely
- Extremely likely

Question: Imagine that plant-based meat has become widely available, tasty and affordable at grocery stores, restaurants, butchers and markets. How likely are you to try plant-based meat? | Single choice

# They are also the most likely to replace animal-based meat with plant-based meat



Likelihood of eating plant-based meat instead of animal-based meat



Top country

Austria



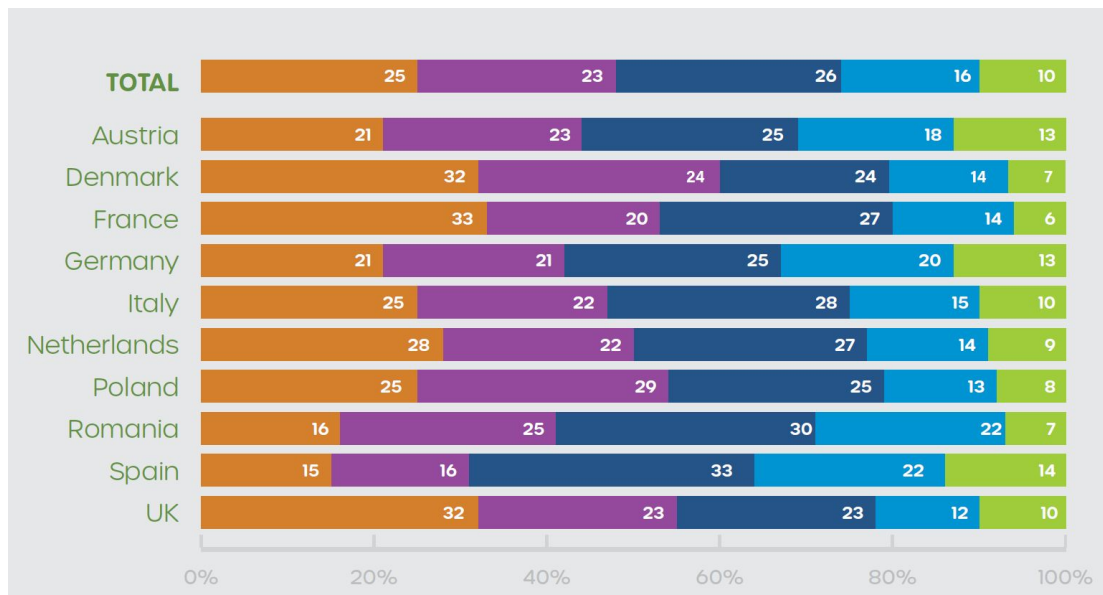
- Not at all likely
- Somewhat likely
- Moderately likely
- Very likely
- Extremely likely

Question: Imagine that you've has the opportunity to try a plant-based meat that has the identical taste and texture as animal-based meat. How likely are you to eat plant-based meat instead of animal-based meat ? | Single choice

# Spanish and German consumers reveal the highest readiness to eat plant-based cheese instead of conventional cheese products



## Likelihood of eating plant-based cheese instead of conventional cheese



Top countries

Spain



Germany



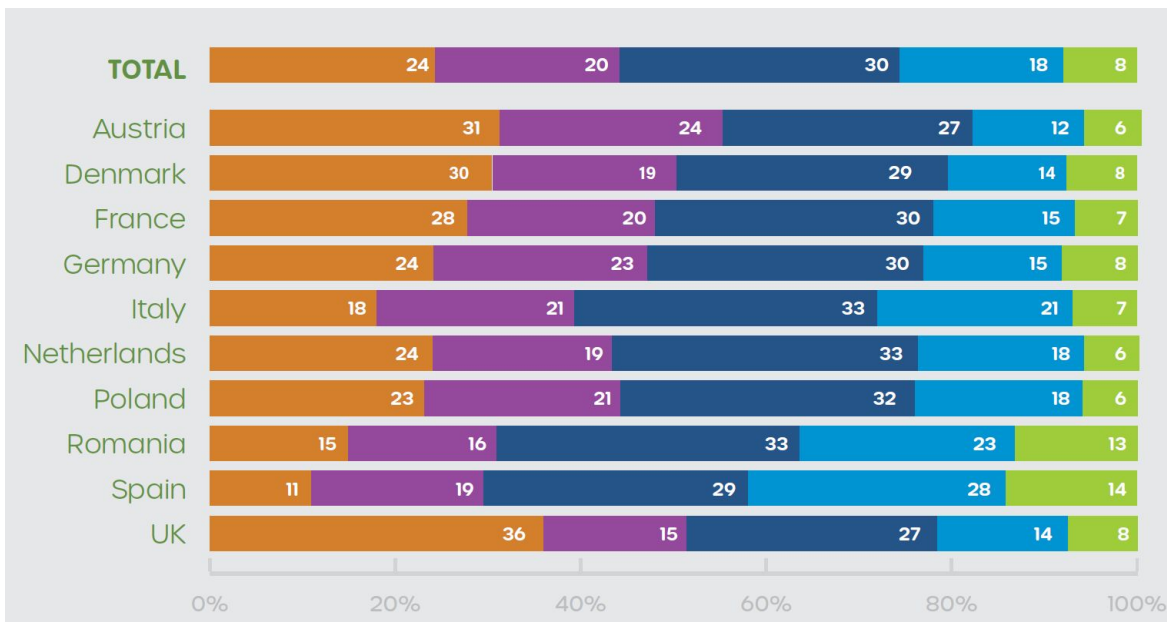
- Not at all likely
- Somewhat likely
- Moderately likely
- Very likely
- Extremely likely

Question: Imagine that you've had the opportunity to try plant-based cheese products, and the taste and texture were identical to conventional cheese products. How likely are you to eat plant-based cheese products instead of conventional cheese products? | Single choice

# In Spain and Romania especially, there is a large potential demand for vegan baked goods



Importance of exclusion of animal-based ingredients in baked goods



Top countries

Spain



Romania



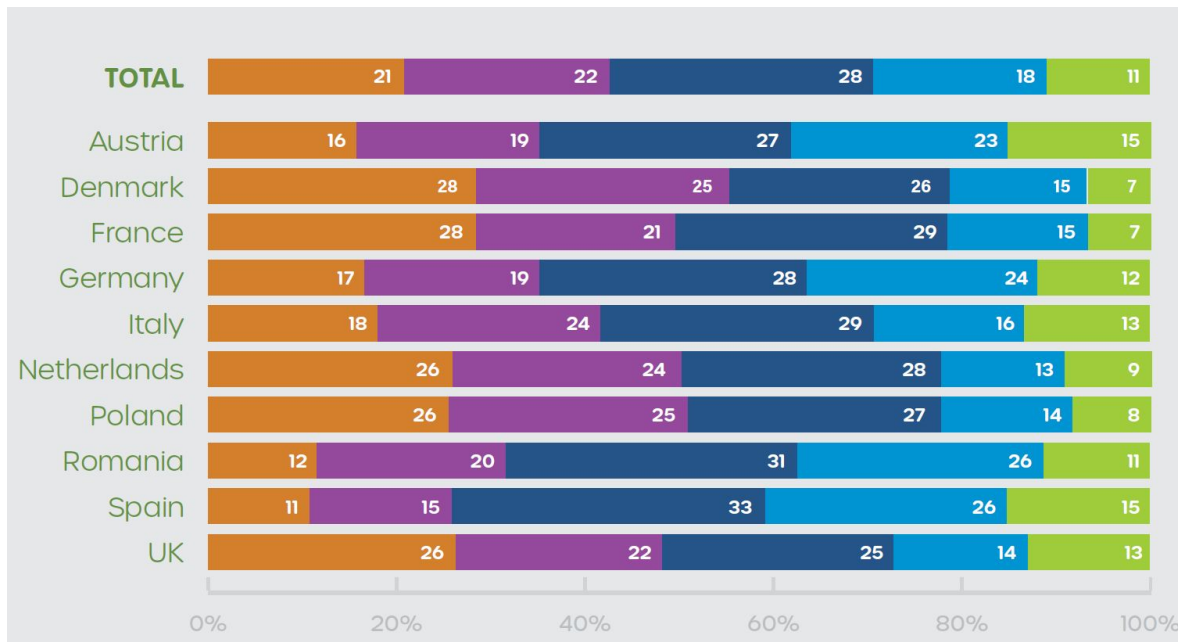
- Not at all important
- Somewhat unimportant
- Neither important nor unimportant
- Somewhat important
- Very important

Question: How important is it for you that bakery products (e.g. bread or cookies) exclude animal-based ingredients such as eggs or butter? | Single choice

# Spanish consumers also show the highest likelihood of eating these products instead of the conventional options



Likelihood of eating vegan bakery products instead of conventional bakery products



Top country

Spain



- Not at all likely
- Somewhat likely
- Moderately likely
- Very likely
- Extremely likely

Question: Imagine that you've had the opportunity to try vegan bakery products (e.g. bread or cookies made without eggs or butter) with exactly the same taste and texture as conventional bakery products. How likely are you to eat vegan bakery products instead of conventional bakery products? | Single choice



# Country findings on readiness to consume meat/cheese alternatives as well as vegan bakery products

Which countries show the most potential for each plant-based food category



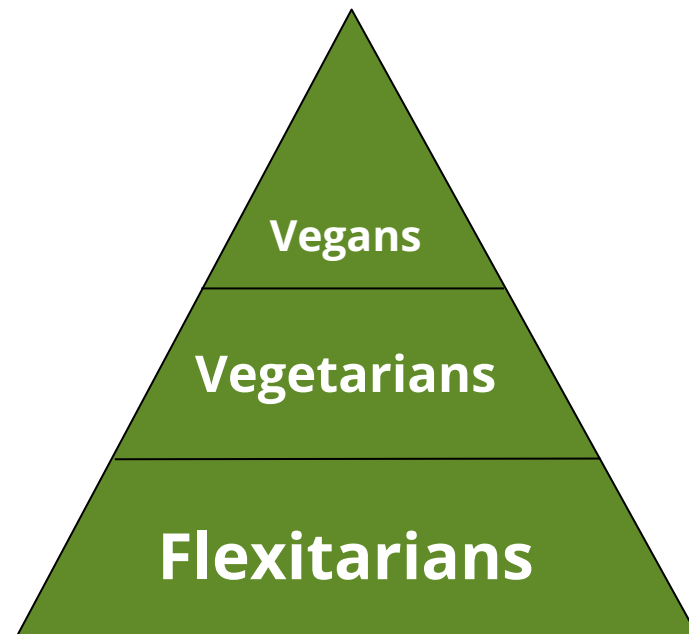
# Spotlight on flexitarians



# Why are flexitarians so important?



90% of consumers of  
plant-based foods  
are neither vegetarian  
nor vegan

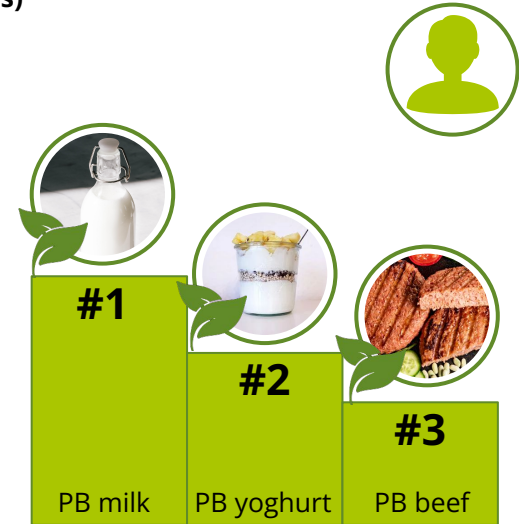


# Flexitarians mostly consume plant-based milk, yoghurt, and beef products

## Ranking of most consumed plant-based food products (flexitarians)

% of flexitarians consuming the respective plant-based food at least 1-3 times a week

<b>Plant-based milk<sup>1</sup></b>	<b>36%</b>
<b>Plant-based yoghurt<sup>2</sup></b>	<b>28%</b>
<b>Plant-based beef products<sup>3</sup></b>	<b>27%</b>
Plant-based poultry products <sup>4</sup>	25%
Plant-based cheese <sup>5</sup>	23%
Tofu, tempeh, seitan	21%
Plant-based pork products <sup>6</sup>	20%
Plant-based fish/seafood products <sup>7</sup>	20%
Plant-based pastries, cakes, and cookies	19%
Plant-based ice cream or sorbet	17%



Question: Which statement best describes how frequently you have consumed the following foods in the last 12 months? | Single selection

1: soya almond/oat/coconut/rice/pea milk 2: soya/almond/oat/coconut yoghurt 3: PB burger/mince 4: PB chicken strips/chunks 5: PB cream cheese/cheese slices/grated cheese 6: PB sausage/pulled pork 7: PB fish sticks/fish burger/tuna

# Nearly three quarters of flexitarians have reduced their meat consumption



Actual meat consumption vs a year ago (flexitarians)

<b>A lot less</b>	<b>26%</b>
<b>Slightly less</b>	<b>47%</b>
No change	24%
Slightly more	3%
A lot more	1%



**73%** of flexitarians are eating **less meat** than a year ago.

# Flexitarians are extremely likely to eat plant-based meat instead of animal-based meat



## Likelihood of eating/purchasing/paying a higher price for plant-based meat (flexitarians)



	Not at all likely	Somewhat likely	Moderately likely	<b>Very likely</b>	<b>Extremely likely</b>
Eat plant-based meat instead of animal-based meat?	6%	15%	26%	<b>29%</b>	<b>24%</b>
Purchase plant-based meat regularly?	6%	14%	31%	<b>30%</b>	<b>19%</b>
Pay a higher price for plant-based meat than for animal-based meat?	15%	22%	38%	<b>18%</b>	<b>7%</b>

Question: Imagine that you've had the opportunity to try a plant-based meat that has the identical taste and texture as animal-based meat. How likely are you to... | Single choice

# The likelihood of eating plant-based cheese rather than conventional options is slightly lower



## Likelihood of eating/purchasing/paying a higher price for plant-based cheese (flexitarians)



	Not at all likely	Somewhat likely	Moderately likely	<b>Very likely</b>	<b>Extremely likely</b>
Eat plant-based cheese products instead of conventional cheese products?	14%	21%	27%	<b>23%</b>	<b>15%</b>
Purchase plant-based cheese products regularly?	13%	19%	31%	<b>23%</b>	<b>14%</b>
Pay a higher price for plant-based cheese products than for conventional cheese products?	23%	21%	31%	<b>18%</b>	<b>7%</b>

Question: Imagine that you've had the opportunity to try plant-based cheese products, and the taste and texture were identical to conventional cheese products. How likely are you to... | Single choice

# Similar results for vegan baked goods



Likelihood of eating/purchasing/paying a higher price for vegan baked goods (flexitarians)



	Not at all likely	Somewhat likely	Moderately likely	Very likely	Extremely likely
Eat vegan bakery products instead of conventional bakery products?	11%	19%	29%	<b>25%</b>	<b>16%</b>
Purchase vegan bakery products regularly?	11%	19%	31%	<b>25%</b>	<b>14%</b>
Pay a higher price for vegan bakery products than for conventional bakery products?	22%	22%	31%	<b>17%</b>	<b>7%</b>

Question: Imagine that you've had the opportunity to try vegan bakery products (e.g. bread or cookies made without eggs or butter) with exactly the same taste and texture as conventional bakery products? How likely are you to... | Single choice



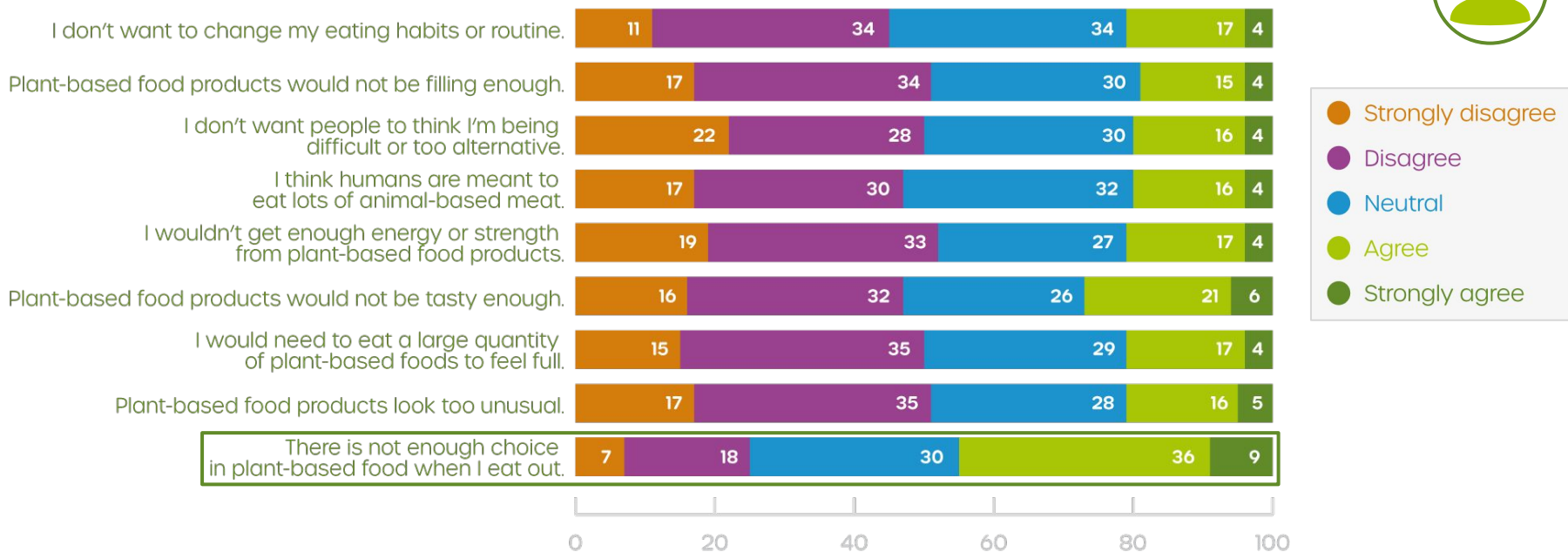
## Poll: Main barriers towards eating plant-based food

In your opinion, what is the main barrier for European consumers towards eating new plant-based food products?



# Flexitarians complain about limited availability of plant-based food (Barriers 1/3)

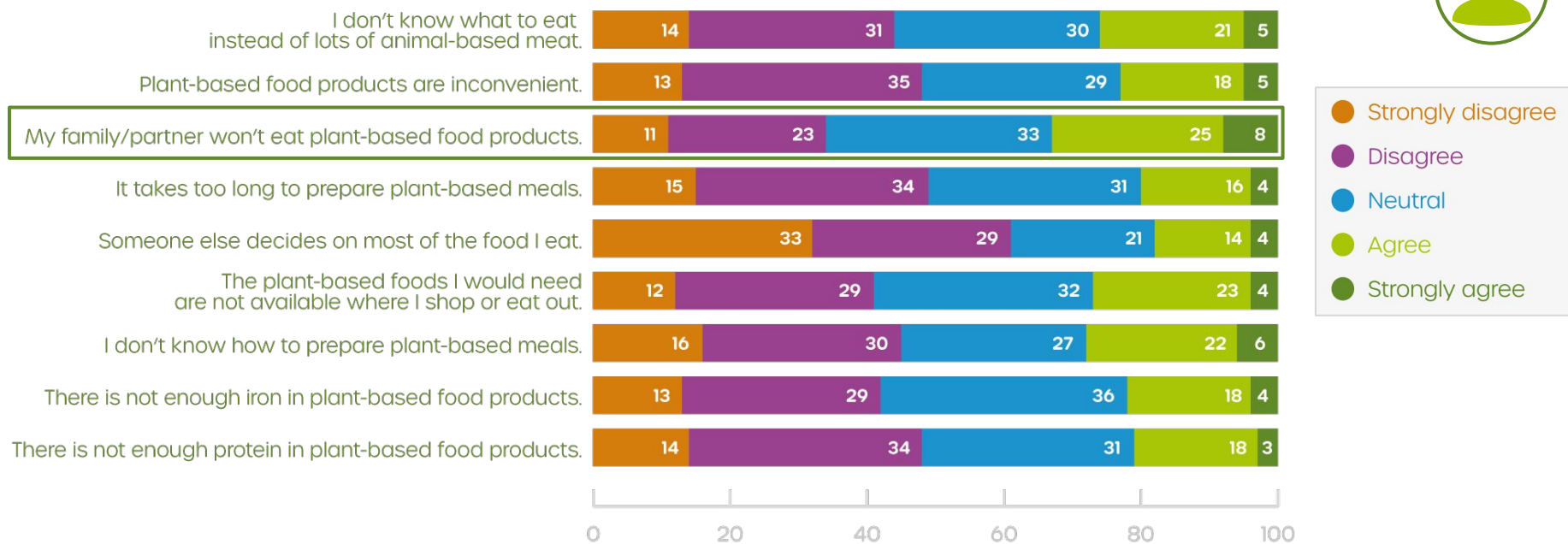
## Barriers towards eating plant-based products (flexitarians) 1/3



Question: Please indicate how much you disagree or agree with each of the following statements with regards to barriers towards eating new plant-based food products and following a plant-based diet? | Single choice

# They also perceive social aspects as a barrier to eating these products (Barriers 2/3)

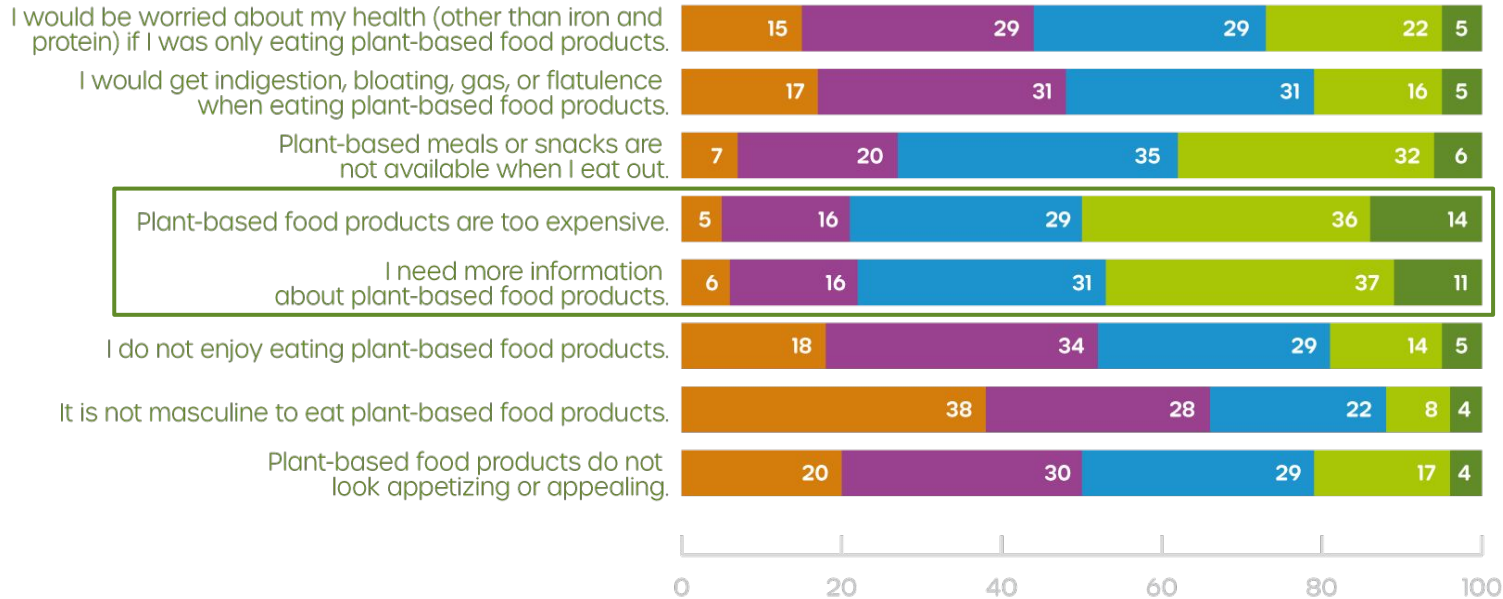
## Barriers towards eating plant-based products (flexitarians) 2/3



Question: Please indicate how much you disagree or agree with each of the following statements with regards to barriers towards eating new plant-based food products and following a plant-based diet? | Single choice

# Prices and a lack of information are also indicated as main obstacles (Barriers 3/3)

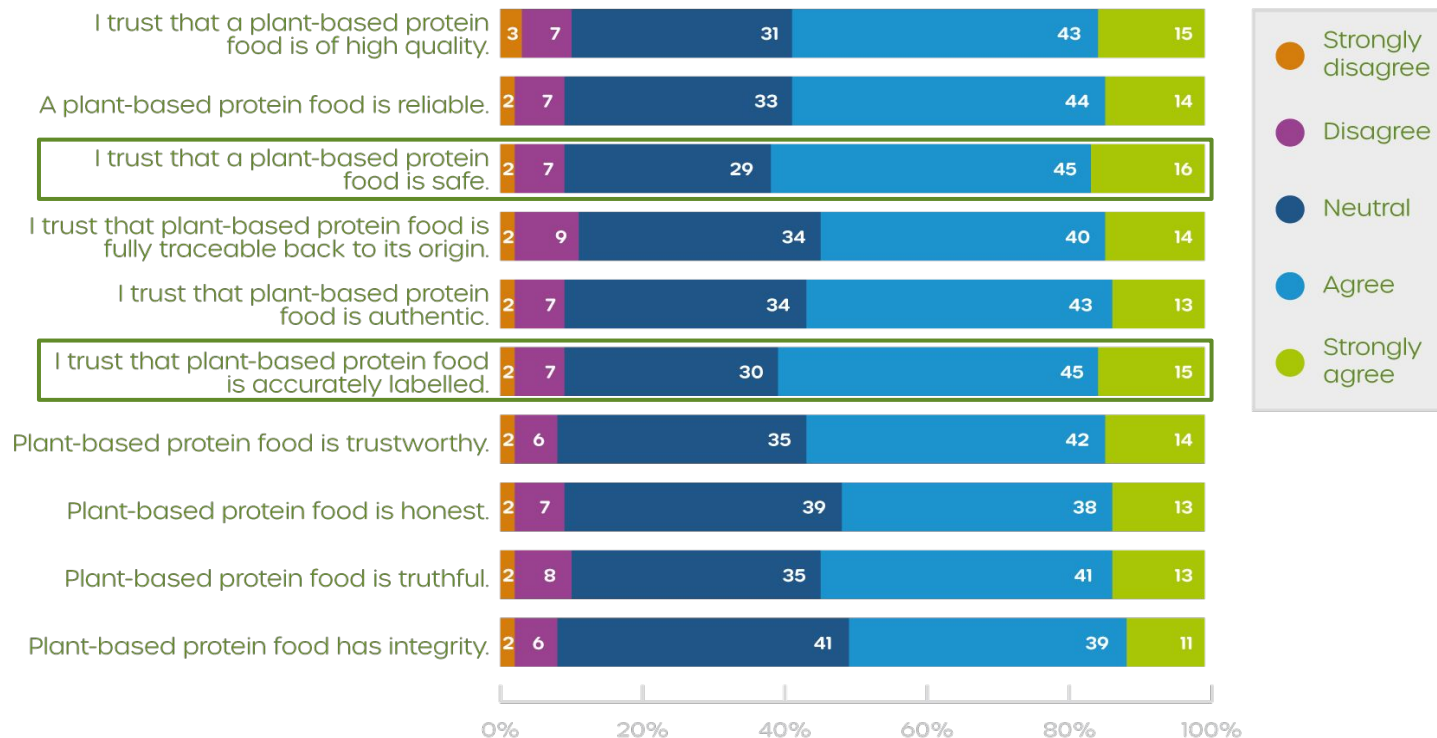
## Barriers towards eating plant-based products (flexitarians) 3/3



Question: Please indicate how much you disagree or agree with each of the following statements with regards to barriers towards eating new plant-based food products and following a plant-based diet? | Single choice

# Flexitarians trust plant-based foods

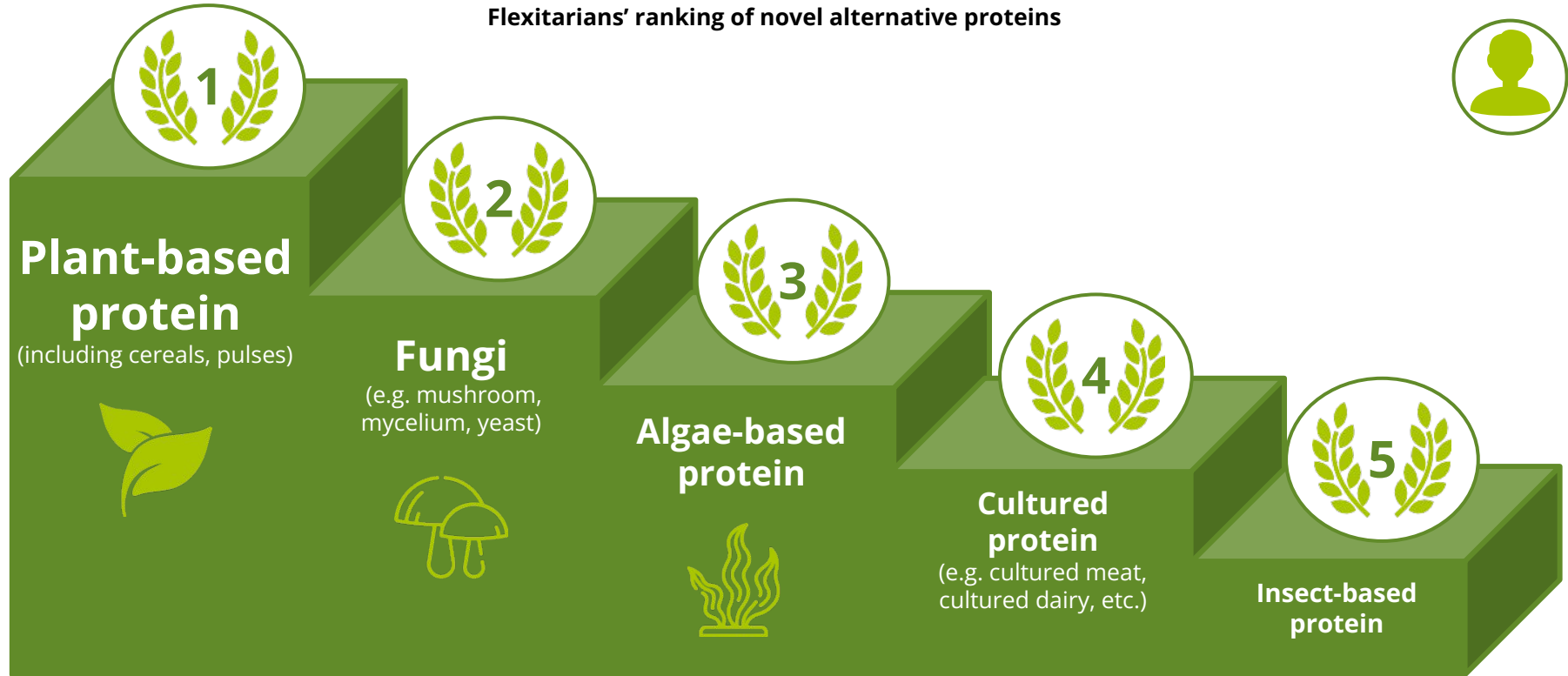
## Trust towards foods based on plant protein (flexitarians)



Question: Please indicate how much you disagree or agree with each of the following statements with regards to trust towards foods based on plant protein (e.g. based on soy protein, pea protein etc.). | Single choice

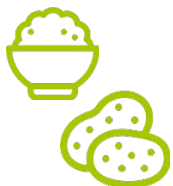
# Flexitarians trust plant-based proteins the most, followed by fungi and algae-based proteins

Flexitarians' ranking of novel alternative proteins

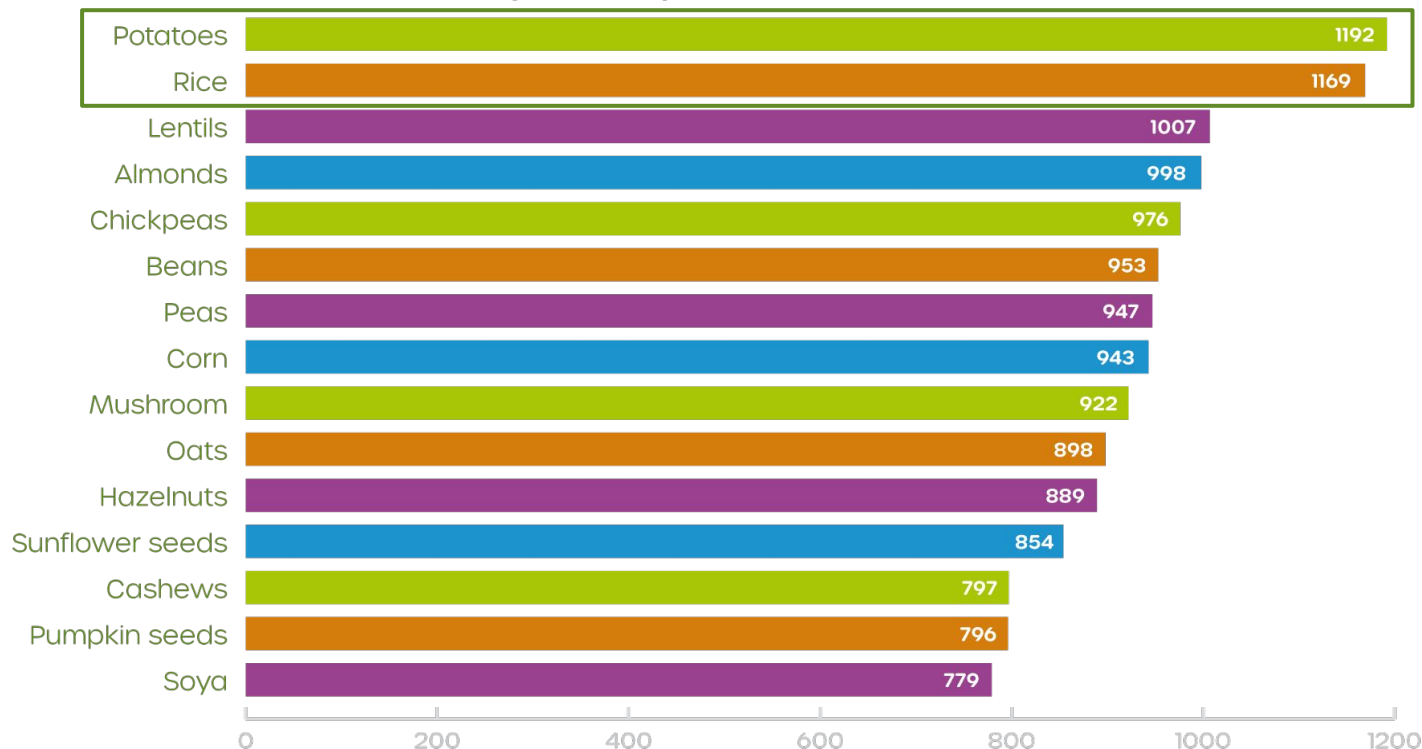


Question: Which of the following alternative proteins do you trust the most? Rank them from 1 (trust the most) to 5 (trust the least). | Single choice

# Flexitarians favour of ingredients that they are fairly familiar with (1/2)



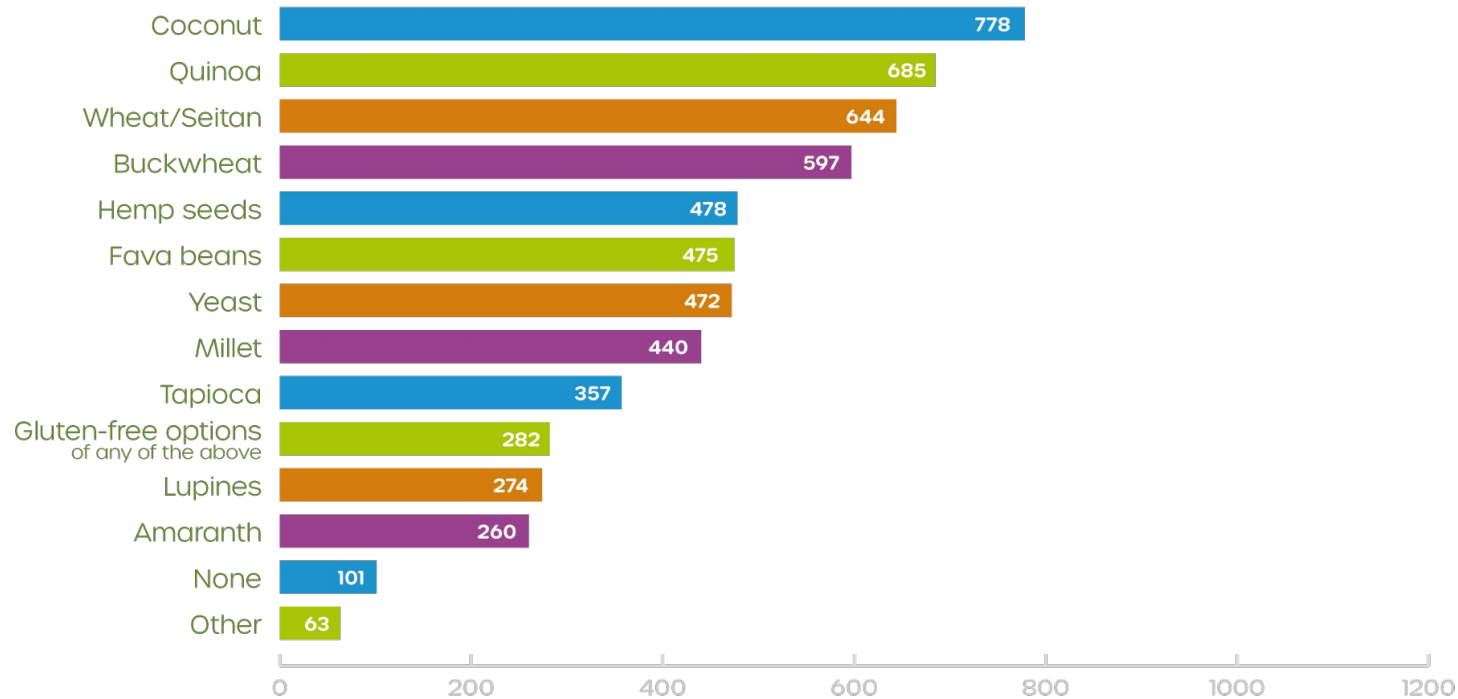
Main ingredient in plant-based food (flexitarians) (1/2)



Question: Which of the following would you like to have as a main ingredients in plant-based food? | Multiple choice

# Flexitarians favour of ingredients that they are fairly familiar with (2/2)

Main ingredient in plant-based food (flexitarians) (2/2)

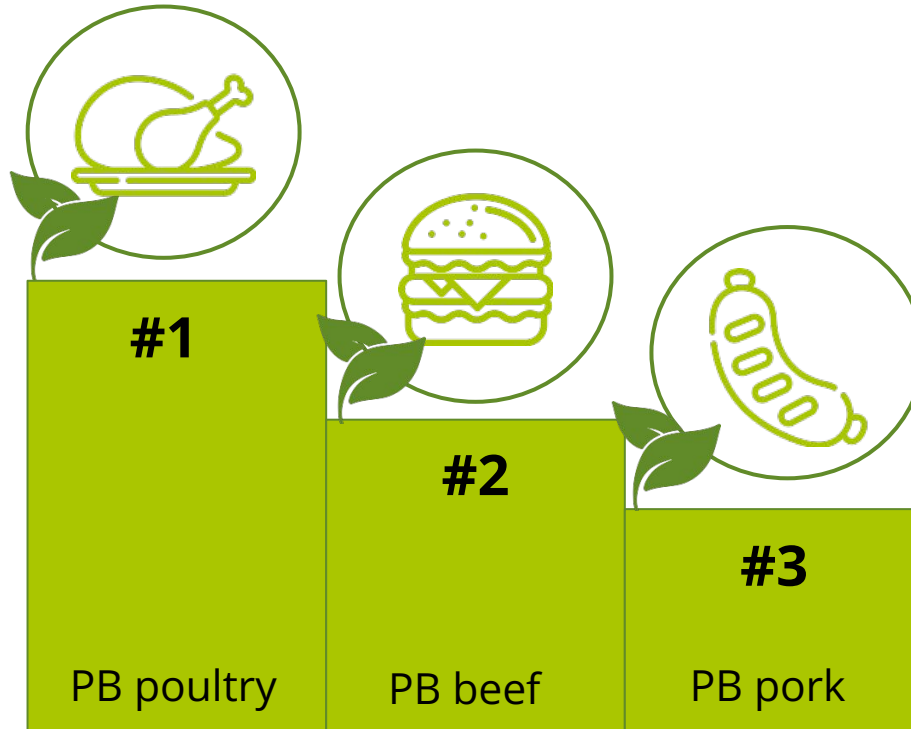


Question: Which of the following would you like to have as a main ingredients in plant-based food? | Multiple choice



# Plant-based poultry and beef are the products that flexitarians would most like to see in supermarkets

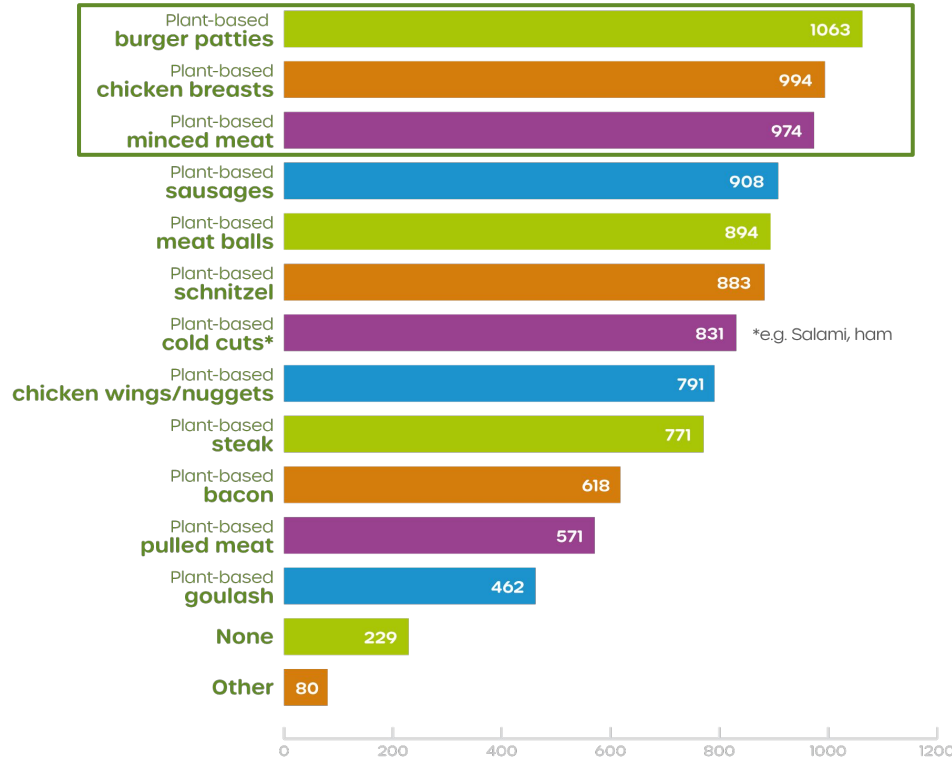
Plant-based meat that flexitarians most wanted to see more of in supermarkets



# Plant-based burger patties and chicken breasts are especially missed



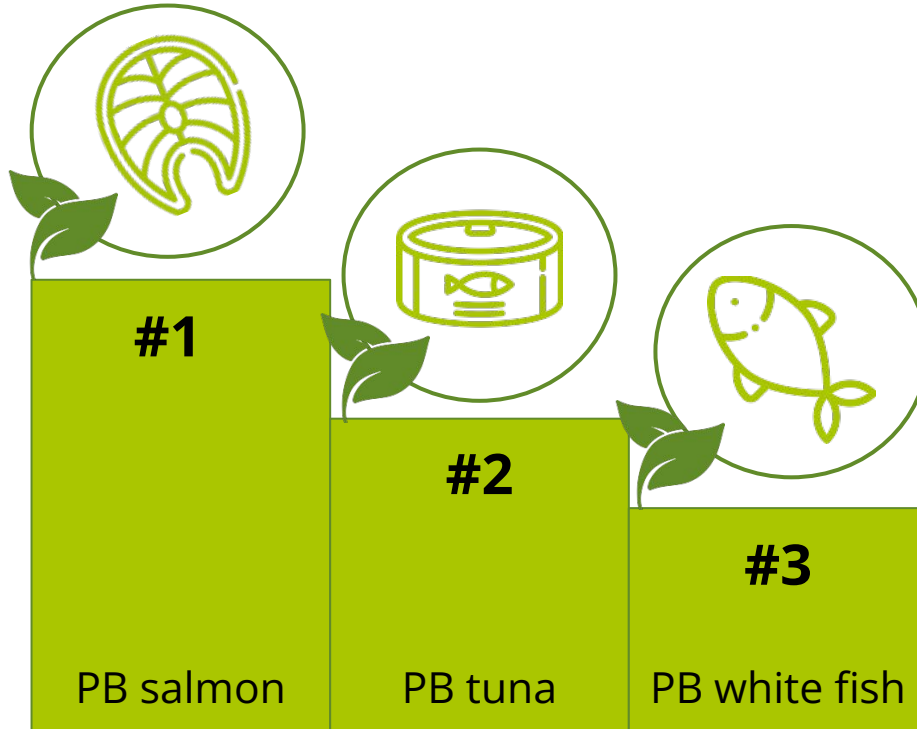
## Specific plant-based meat products that flexitarians most wanted to see more of in supermarkets



Question: Specifically, what kind of plant-based meat products do you wish you could buy in the supermarket? | Multiple choice

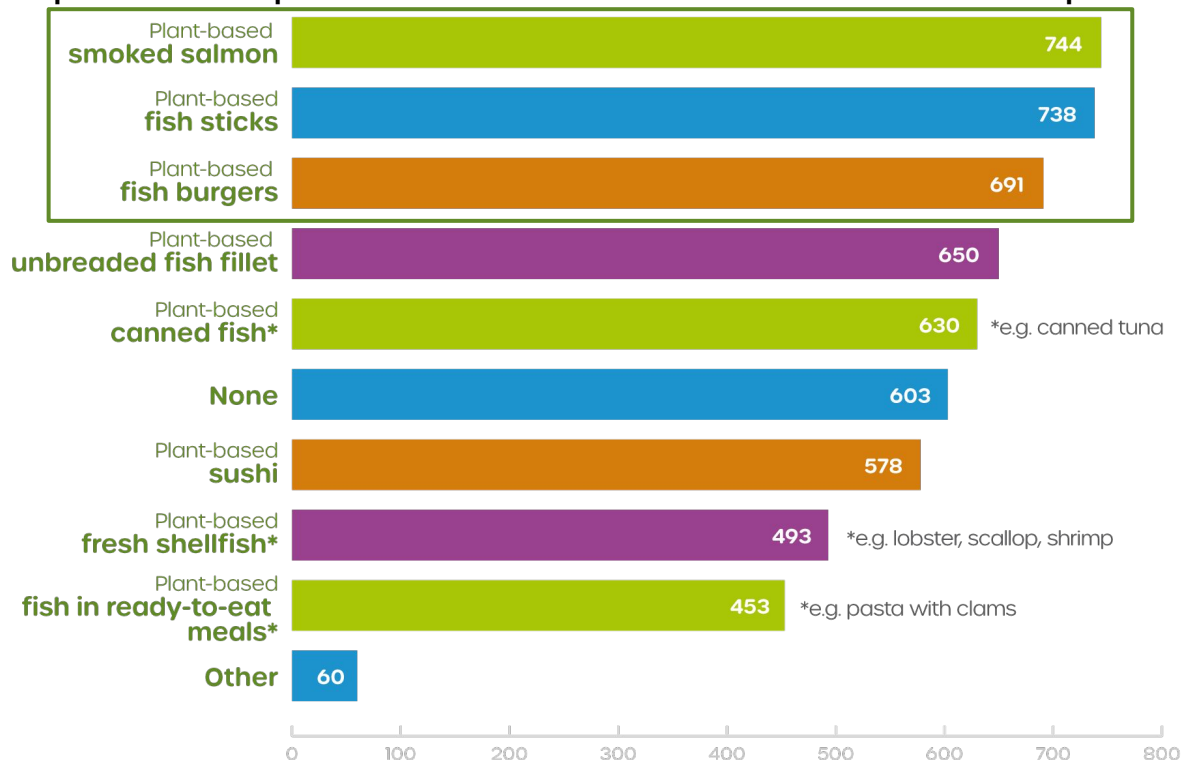
# In terms of plant-based fish, flexitarians wished they could buy much more salmon and tuna

Plant-based fish that flexitarians most wanted to see more of in supermarkets



# Especially plant-based smoked salmon and fish sticks

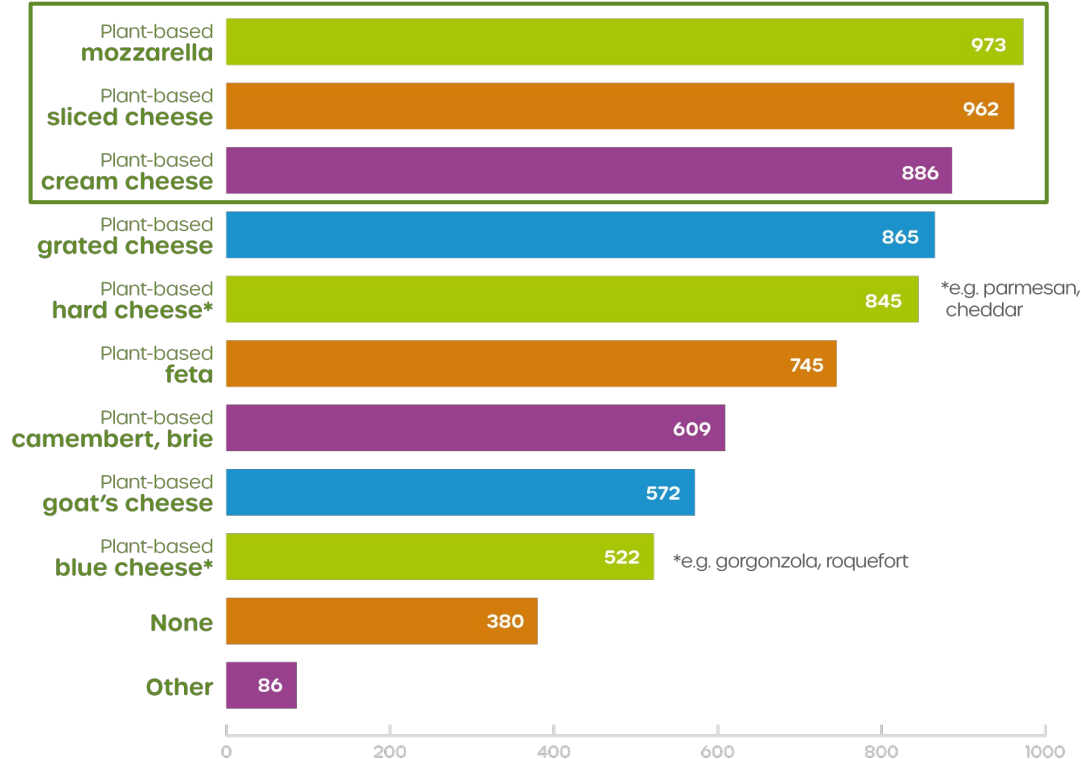
## Specific plant-based fish products that flexitarians most wanted to see more of in supermarkets



Question: Specifically, what kind of plant-based fish products do you wish you could buy in the supermarket? | Multiple choice

# In the plant-based cheese category, flexitarians want many more products e.g. mozzarella and sliced cheese

## Specific plant-based cheese products that flexitarians most wanted to see more of in supermarkets

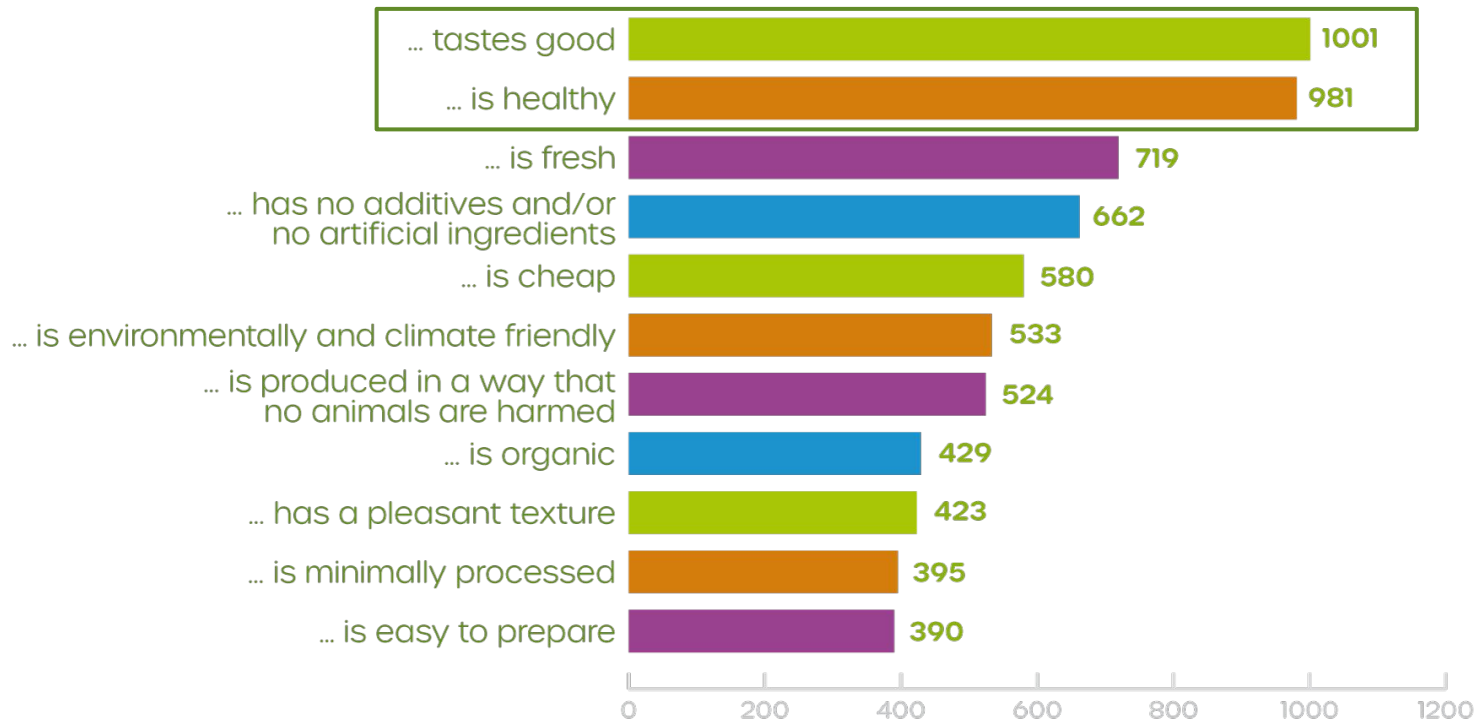


Question: What kind of plant-based cheese products do you wish you could buy in the supermarket? | Multiple choice

# For flexitarians, it's all about taste and health (1/2)



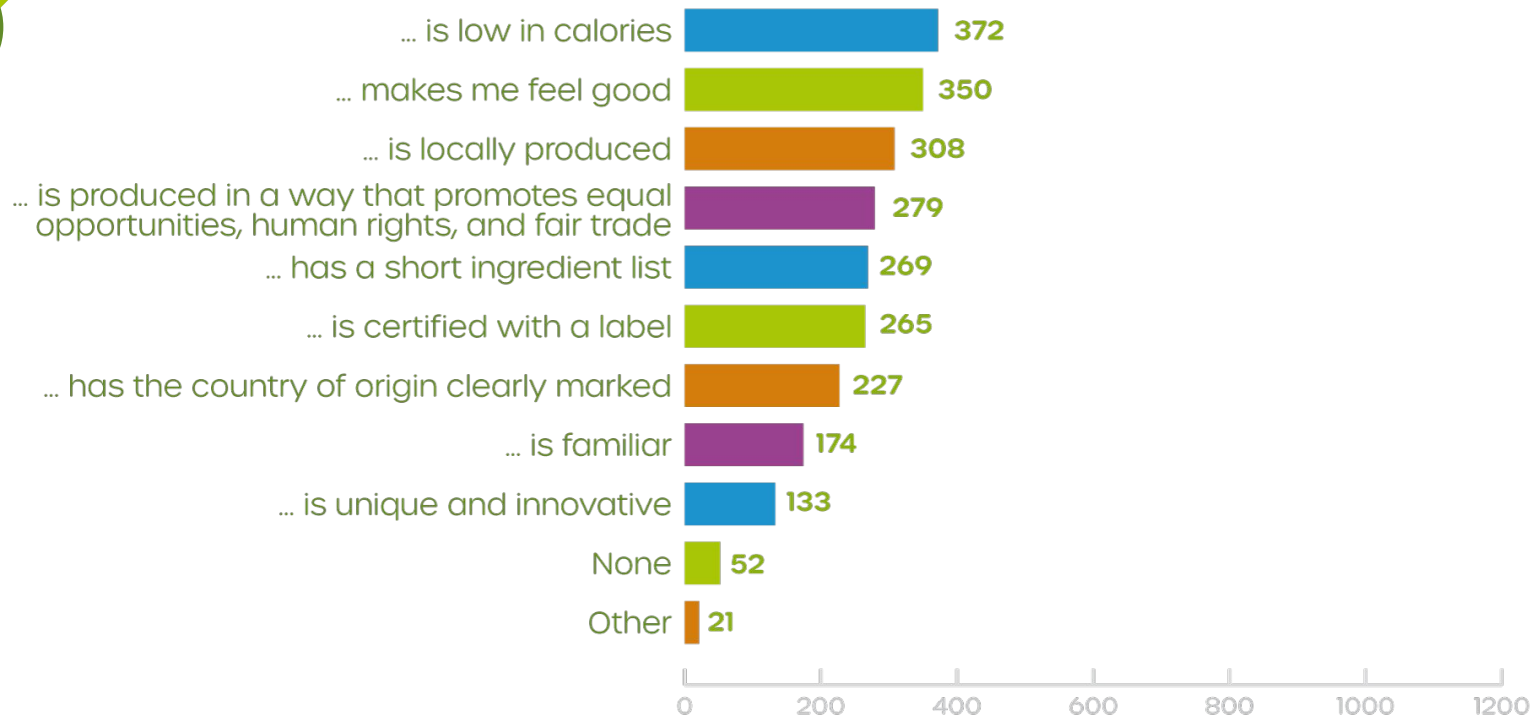
## Important factors when choosing a plant-based/vegan food product (flexitarians) (1/2)



# For flexitarians, it's all about taste and health (2/2)



## Important factors when choosing a plant-based/vegan food product (flexitarians) (2/2)



# Flexitarians – summary

Most important  
target group



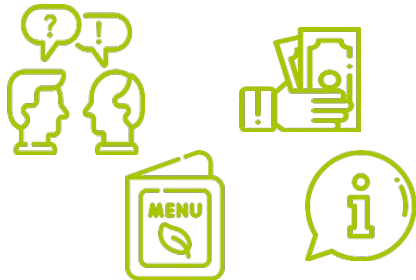
Most-consumed  
plant-based foods



Reduced meat  
consumption



Barriers



Most-requested  
plant-based food products



Purchase drivers





# Supermarkets and discount stores are favoured shopping locations



# Availability in supermarkets and discount stores is key

## European ranking of future shopping locations

<b>Supermarkets</b>	<b>65%</b>
<b>Discount stores</b>	<b>43%</b>
<b>Speciality food shops<sup>1</sup></b>	<b>23%</b>
Farmers markets	20%
Convenience stores	16%
Organic supermarkets	14%
Online grocery stores	13%
Speciality food retail online stores for organic and health foods	7%
Drug stores	7%
Other	2%



Question: Where are you likely to purchase food products most frequently from in the future? | Multiple choice

<sup>1</sup> (e.g. butcher, bakery, cheese)

# Discount stores drive the plant-based sector (1/2)



## Lidl



Leading German supermarket chain announced **expansion of vegan range Vemondo**, with 17 new products in 800 UK locations and more than 1,500 French locations.



## Discount stores drive the plant-based sector (2/2)



### Lidl

Lidl offers 44 Vemondo products in Germany. The range is available in more than 3,200 stores. In total, Lidl offers 450 certified vegan/vegetarian products.

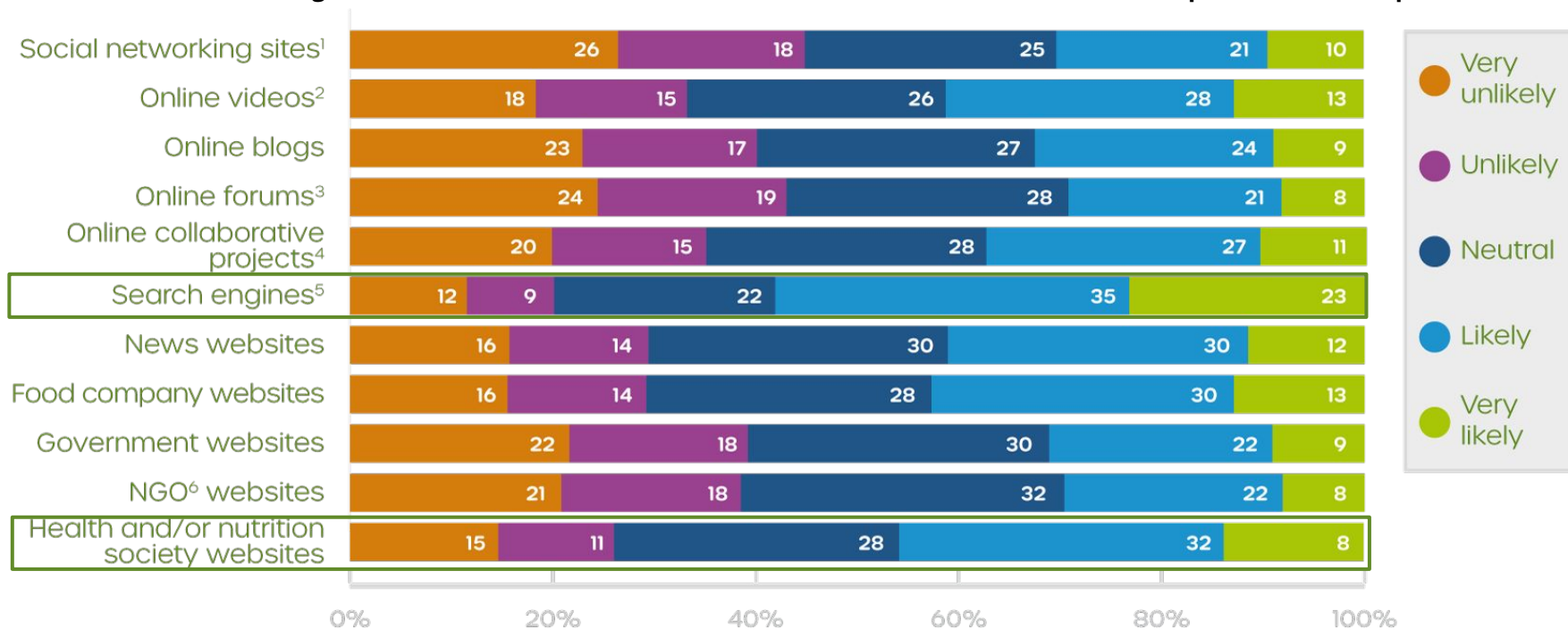


**Search engines and health and nutrition-society websites are the leading channels for finding out about plant-based foods**

# Europeans are most likely to use search engines and health/nutrition society websites



**Likelihood of using different online communication channels to find out information about plant-based food products**

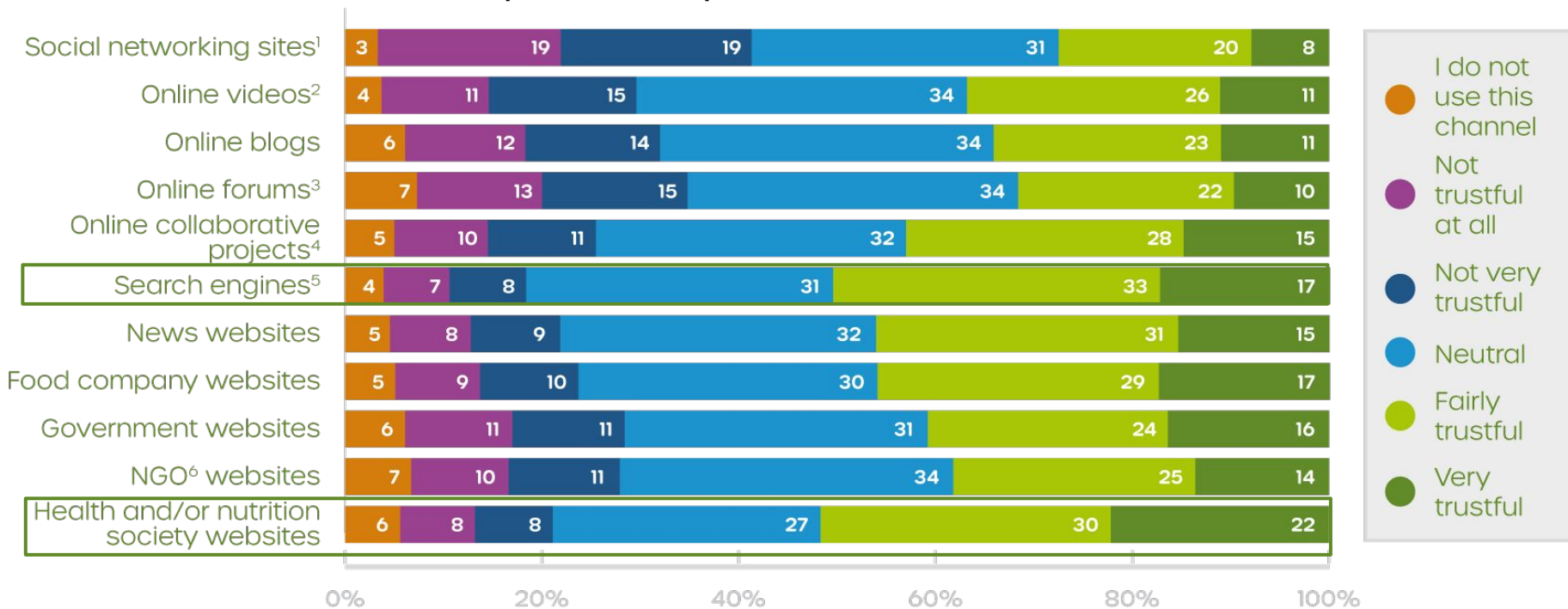


Question: How likely would you be to use these online communication channels to find information about plant-based food products? | Single choice

1: e.g. Facebook, Twitter, Instagram, Pinterest 2: e.g. YouTube 3: e.g. Reddit 4: e.g. Wikipedia 5: e.g. Google 6: Non-Governmental Organization

# They also trust these channels the most

Trust in information about plant-based food products from different online communication channels



Question: HIn general, how much would you trust the information about plant-based food products from ... | Single choice

1: e.g. Facebook, Twitter, Instagram, Pinterest 2: e.g. YouTube 3: e.g. Reddit 4: e.g. Wikipedia 5: e.g. Google 6: Non-Governmental Organization

# 3. Eight key insights and the way forward

*"The survey suggests tremendous potential for plant-based foods in Europe and gives a green light to all relevant players in the field to develop more and better products."*

JASMIJN DE BOO  
Vice President, ProVeg International





## Key Takeaway #1: Huge potential due to flexitarians



Tremendous potential for plant-based foods in Europe – especially when it comes to flexitarians.



Dutch, Romanian, and German consumers are especially lucrative target groups.

## Key Takeaway #2: Animal-based products are being replaced by plant-based options



A fundamental shift in food consumption from animal- to plant-based food is taking place.



46% of meat-eating Europeans have decreased their meat consumption. Around 30% intend consuming more plant-based meat and dairy products.

## Key Takeaway #3:

### Plant-based food products come with challenges



For flexitarians, availability, price, lack of information, and social interactions are the main obstacles to shifting towards plant-based eating.



45% of flexitarians think that there are not enough plant-based options in supermarkets, restaurants, etc. and 50% think that these products are too expensive.

## Key Takeaway #4: Trust in plant-based foods is a given



Flexitarians trust plant-based foods.



61% of flexitarians trust that plant-based foods are safe, and 60% think that they are accurately labelled.

## Key Takeaway #5:

Plant-based poultry, beef, salmon, tuna, mozzarella, and sliced cheese are the most missed products



Flexitarians would like to buy more plant-based poultry and beef as well as salmon and tuna. They also want many more cheese alternatives.



Plant-based chicken breasts are especially needed, along with sliced cheese and mozzarella.

## Key Takeaway #6: For flexitarians, it is all about taste and health



Flexitarians rate taste and health as the top two drivers.



It is also important to them that a plant-based food product is fresh, has no additives or artificial ingredients, and is affordable.

## Key Takeaway #7: Availability in discounters is key



Discounters are one of the most important future-purchase channels for European consumers.



43% of Europeans stated that they will purchase their food most frequently from discounters in the future.

## Key Takeaway #8: Search engines and health/nutrition-society websites are used the most









Consumers reveal a high likelihood of using search engines and health/nutrition society websites for gathering info about plant-based foods.



Nearly 60% of respondents were likely or very likely to use search engines, while 50% indicated a high likelihood of using health/nutrition-society websites.



# Key Takeaways

	<b>#1</b>	Huge potential due to flexitarians
	<b>#2</b>	Animal-based products are being replaced by plant-based options
	<b>#3</b>	Plant-based food products come with challenges such as availability and price
	<b>#4</b>	Trust in plant-based foods is a given
	<b>#5</b>	Plant-based poultry, beef, salmon, tuna, mozzarella, and sliced cheese are the most missed products
	<b>#6</b>	For flexitarians, it's all about taste and health
	<b>#7</b>	Availability of plant-based foods in discount stores is key
	<b>#8</b>	Search engines and health/nutrition-society websites are used the most

**Download here:**

“What consumers want: A survey on European consumer attitudes towards plant-based foods, with a focus on flexitarians.”

**FREE**

<https://smartproteinproject.eu/consumer-attitudes-plant-based-food-report/>



**Download here:**

“What consumers want: A survey on European consumer attitudes towards plant-based foods.  
Country-specific insights.”

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## 4. Q&A

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