MEDIA RELEASE

SMART PROTEIN SURVEY: MAJORITY OF GERMANS NOW EAT LESS MEAT

Over half of consumers have significantly reduced their meat consumption

Berlin, November 10, 2021 – A joint survey by ProVeg, Innova Market Insights, the University of Copenhagen and Ghent University has found a clear shift towards a plant-based diet across Europe. The survey, conducted as part of the Smart Protein Project, found that 46 % of European consumers have significantly reduced their meat consumption over the last year. At 51 %, the figure among German consumers was even more than half. This puts Germany in second place behind Romania of the eleven countries consulted.

The results of the survey on attitudes towards plant-based foods, especially among flexitarians, were published ahead of the meeting of heads of state and government at the UN Climate Change Conference in Glasgow (COP 26). Currently, animal products account for 82 % of dietary CO_2 emissions in Europe.[1] Research shows, however, that switching to a plant-based diet could reduce personal dietary emissions by up to 50 %.[2] [3]

Among the respondents, 30 % already follow a flexitarian diet and reduce their consumption of animal foods. At 10 %, the proportion of respondents with a vegan or vegetarian diet was highest in Germany. More than 7,500 people in 11 European countries took part in the survey. Among other things, respondents were asked about their attitudes towards plant-based foods, their trust in these products, their consumption habits, and the most important reasons for their food choices. The results are also available as country-specific reports.

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[1] Sandström, V., H. Valin, T. Krisztin, et al. (2018): The role of trade in the greenhouse gas footprints of EU diets. Global Food Security 19, S. 48–55. DOI: https://doi.org/10.1016/j.gfs.2018.08.007
[2] Wissenschaftlicher Beirat Agrarpolitik, Ernährung und gesundheitlicher Verbraucherschutz & Wissenschaftlicher Beirat Waldpolitik beim BMEL (2016): Klimaschutz in der Land- und Forstwirtschaft sowie den nachgelagerten Bereichen Ernährung und Holzverwendung, Berlin
[3] Hallström, E., A. Carlsson-Kanyama & P. Börjesson (2015): Environmental impact of dietary change: a systematic review, Journal of Cleaner Production 91, S. 1–11. DOI: http://dx.doi.org/10.1016/j.jclepro.2014.12.008

Germany highlights

- More than half of the respondents (51 %) said they had already significantly reduced their meat consumption
- 2 out of 5 participants (41 %) see themselves reducing their meat consumption in the near future
- Around 1 in 3 (32 %) would also like to reduce their consumption of dairy products

Consumer opinions on plant-based products

- More than half of the respondents (55 %) named the price as the biggest obstacle to switching to plant-based products. However, 1 in 4 (26 %) said they would be willing to pay a higher price for plant-based meat than for animal-based meat
- 43 % of respondents would try plant-based alternatives with the taste and texture of animal meat, and 41 % would buy them regularly
- Respondents particularly asked for plant-based mince and burger patties (32 % each) as well as chicken breasts and sausages (30 % each) in supermarkets
- Plant-based fish fingers (27 %) and smoked salmon (22 %) were also high on the wish list
- In terms of plant-based cheese, respondents particularly wanted fresh cheese (32 %), sliced cheese (32 %), and mozzarella (31 %)
- The most consumed plant-based products are milk (28 %), yoghurt (21 %), poultry and beef (20 % each, all at least weekly)
- Potatoes, rice and lentils are the preferred main ingredients for plant-based foods

"Consumers are showing the way: They want even more and even better plant-based foods. The demand is there, now the supply must grow. This is a great opportunity for all stakeholders."
Dr. Kai-Brit Bechtold, Senior Consumer Research Scientist ProVeg Germany

"Our diet is changing at great speed, and the demand for innovative protein alternatives is increasing. In view of our climate goals, this trend gives us hope. However, in order for the development to continue, the next government should urgently focus more sharply on research and development around sustainable proteins. Germany has the potential to become a centre of innovation, and we need to seize the opportunity."
Matthias Rohra, Managing Director ProVeg Germany

Overall report + country specific insights
smartproteinproject.eu/consumer-attitudes-plant-based-food-report/

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About Smart Protein

Smart Protein is a €10-million, EU-funded project that seeks to develop a new generation of foods that are cost effective, resource efficient, and nutritious. Alternative protein sources such as legumes and side streams from beer and pasta production are used to generate plant-based ingredients and plant-based meat, seafood, dairy products, and baked goods.
www.smartproteinproject.eu

About ProVeg

ProVeg International is a food awareness organisation working to transform the global food system by replacing animal-based products with plant-based and cultured alternatives. ProVeg works with decision-making bodies, companies, investors, the media, and the general public to help the world transition to a society and economy that are less reliant on animal agriculture and more sustainable for all humans, animals, and our planet. ProVeg has offices in nine countries across four continents and is active around the world. ProVeg has permanent observer status with the UNFCCC, special consultative status with ECOSOC, is accredited for UNEA, and has received the United Nations' Momentum for Change Award.
www.proveg.com

KEY INSIGHTS

Overall report + country specific insights
smartproteinproject.eu/consumer-attitudes-plant-based-food-report/

Consumption behaviour

- Overall, **30 %** of participants identify as **flexitarian**. The Netherlands (42 %) and Romania (40 %) had the highest share of flexitarians. **7 %** of the total sample are **plant-based eaters** (vegan & vegetarians).
- In terms of animal-based food, European consumers **most frequently consume milk** (38 % daily), **cheese** (25 % daily), and **yoghurt** (25 % daily). In terms of meat, **poultry** is the most consumed category (55 % at least once a week). Looking at plant-based food, **plant-based milk** (28 % at least once a week), **plant-based yoghurt** (23 % at least once a week) and **plant-based beef** (22 % at least once a week) are most frequently consumed.
- European consumers are most likely to go to the **supermarket** (65 %) and **discount stores** (43 %) when purchasing food products.

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- European consumers are most likely to use **search engines** (58 %), **health/nutrition society websites** (46 %), and **online videos** (41 %) in order to get information about plant-based foods products.[1]
- European consumers **trust health/nutrition society websites** (52 %) and **search engines** (50 %) the most.[2]

Plant-based meat and fish

- **46 %** of European consumers **eat less meat** now, compared to a year ago.[3] **39 %** intend **reducing their meat consumption** (e.g. beef, pork, chicken) in the next six months.[4]
- **25 %** of Europeans intend **increasing their consumption of plant-based meat products** (e.g. plant-based burgers/sausages) in the next six months. The Netherlands and Spain show the highest intention to increase their plant-based meat consumption: 28 % of Dutch and Spanish state that they will do so.[5]
- Consumers in **Italy, Denmark** and **Germany** are the most likely to eat plant-based meat products rather than conventional meat products.
- Overall, **38 % are likely to try plant-based meat** if it becomes widely available and is tasty and affordable.[6]
- **36 %** of European consumers are more likely to **eat plant-based meat** than animal-based meat, **35 %** are likely to **purchase it** regularly and **22 %** are likely to **pay a higher price** for it (if it has the identical taste and texture as animal based meat).[7]
- European consumers show high demand for **plant-based poultry** (43 %) and plant-based **beef** (41 %). Specifically, they wish they could buy **plant-based burger patties** (34 %), **chicken breasts**, and **minced meat** (31 %) in the supermarket.
- Overall, European consumers show a high demand for **plant-based salmon** (31%) and **tuna** (29 %). Specifically, they wish they could buy **plant-based fish sticks**, **smoked salmon** (24 %) and **fish burgers** (22 %).

Plant-based dairy

- **28 %** of European consumers intend **reducing their dairy product consumption** (e.g. milk, yoghurt, cheese) in the next six months.[8]

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1 Share of people who selected 'likely '+ 'Very likely' at the respective statement
2 Share of people who selected 'Fairly trustful'+'Very trustful' at the respective statement
3 Share of people who selected 'A lot less'+'Slightly less' at the respective statement
4 Share of people who stated 'I will consume less'+'I will consume a little less' at the respective statement
5 Share of people who selected 'I will consume a little more'+'A lot more' at the respective statement
6 Share of people who are 'Very likely'+ 'Extremely likely' to the respective statement
7 Share of people who are 'Very likely'+'Extremely likely' at the respective statement
8 Share of people who selected 'I will consume a little less'+'I will consume less' at the respective statement

- Overall, **26 %** of European consumers intend to **increase their consumption of plant-based dairy products** (e.g. soya/oat milk, coconut, yoghurt) in the next six months.[9]
- Consumers in **Italy, Denmark,** and **Spain** are most likely to **replace conventional cheese products** with plant-based cheese products.
- **26 %** of European consumers are likely to **eat plant-based cheese products** instead of conventional cheese products, if these are identical in terms of taste and texture.[10]
- **28 %** of European consumers would most likely **purchase plant-based cheese on a regular basis** if taste and texture were identical to conventional cheese.[11]
- **20 %** of European consumers are willing to **pay a higher price for plant-based cheese** than for conventional cheese products.[12]

Attitudes, beliefs and purchase drivers

- **Price** (52 %) is the main barrier to eating more plant-based foods, followed by a **lack of information** (45 %) and a **lack of choice when eating out** (41 %).[13]
- **58 %** of European consumers believe that consuming high amounts of **meat might cause serious health problems** and **51 %** of people would **reduce their meat consumption if their doctor recommended** doing so. **45 %** choose food that **minimises animal cruelty** and **43 %** feel able to **reduce their meat consumption** in the coming months. **47 %** of consumers believe that eating **meat** at every meal **is expensive** but also think that plant-based meat is too expensive.[14]
- When choosing **food products,** European consumers rate **taste** (83 %) and **freshness** (80 %) as the most important factors.[15]
- When choosing **plant-based food products, taste** (40 %), **healthiness** (34 %), and **freshness** (29 %) are the most important factors for European consumers.[16]
- European consumers trust that **plant-based protein food** is **safe** (51 %) and **accurately labelled** (50 %).[17]
- When asked about plant-based protein, insect-based protein, cultured protein, algae-based protein, and fungi, European consumers **trust plant-based protein the most** (39 %) and insect-based protein the least (35 %).[18]

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[9] Share of people who selected 'I will consume a little more'+'I will consume more' at the respective statement
[10] Share of people who are 'Very likely' + 'Extremely likely' to the respective statement
[11] Share of people who are 'Very likely' + 'Extremely likely' to the respective statement
[12] Share of people who are 'Very likely' + 'Extremely likely' to the respective statement
[13] Share of people who 'Agree' + 'Strongly agree' with the respective statement
[14] Share of people who 'Agree' + 'Strongly agree' with the respective statement
[15] Share of people who think the respective statement is 'Somewhat important'+'Very important'
[16] Maximum of five answers were allowed out of 22 options
[17] Share of people who 'Agree'+'Strongly agree' to the respective statement
[18] Ranking from 1 (trust the most) to 5 (trust the least)

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Vegan baked goods

- Consumers in **Denmark, Spain,** and **Italy** are the **most likely to eat vegan baked goods** instead of conventional baked goods.
- **26 %** of European consumers think it is **important that baked goods exclude animal-based ingredients.**[19]
- **29 %** of European consumers are **likely to eat vegan rather than conventional baked goods,** while 30 % are likely to purchase vegan baked goods on a regular basis and 19 % are likely to pay a higher price for vegan rather than conventional baked goods if they have the same taste and texture.[20]

Remaining outcomes

- **49 %** of European consumers think that an **organic label plant-based food products is important.** Out of all the countries in Europe, **Italy** and **Romania** place the highest importance on organic labels, while 61 % of Italian and Romanian consumers think that an organic label on plant-based food products is important.[21]
- **Potatoes** and **rice** are Europeans' favourite ingredients in plant-based foods: 43 % are in favour of plant-based food products that include potatoes as a main ingredient, while 41 % selected rice.

[19] Share of people who think the respective statement is 'Somewhat important'+'Very important'
[20] Share of people who are 'Very likely' + 'Extremely likely' to the respective statement
[21] Share of people who think the respective statement is 'Somewhat important'+'Very important'