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

France

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smart protein

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Top 10 key takeaways

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58% of meat consumers in France say that they **have reduced their annual meat intake**.

25% of French respondents view themselves as flexitarians, 3% as pescatarians, 4% as vegetarians, and 2% as vegans.

The primary motives for reducing meat or dairy consumption are **health (38%), animal welfare (30%), and the environment (29%)**.

French respondents plan on substituting animal-based foods with legumes (45%), legume-based foods (33%), plant-based dairy alternatives (31%), and plant-based meat alternatives (27%).

Price (40%) and taste (33%) remain the key barriers to choosing plant-based alternatives.

68% of French consumers intend on purchasing plant-based alternatives from **supermarkets**, while 25% plan on buying them from **discounters**.

The most requested plant-based alternatives in stores and consumption points are **plant-based yoghurt** (28%), followed by **plant-based baked goods** (27%).

37% of French respondents **trust plant-based alternatives** more than they did three years ago.

French respondents trust plant-based alternatives mostly due to their **safety (45%), reliability (45%), and truthfulness (43%)**.

63% want policymakers **to increase standards for transparency in product certifications,** and 61% want tax removed from food that has a less negative impact on the environment.

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Introduction

The plant-based retail market in France is the fifth largest in Europe, with sales growing by 5% from 2020 to 2022, reaching €425.7 million. In terms of categories, plant-based milk leads the way, followed by plant-based meat, which is showing rapid growth, and plant-based cheese, which is now the fastest-growing category.[a]

Findings from the Smart Protein consumer survey underscore the **significant potential of the plant-based market in France**, revealing promising opportunities for both retail and food-service companies to expand their plant-based product portfolios.

With rising awareness of environmental and health concerns, French consumers, especially the **younger demographic, which is more sustainability-focused and eager to embrace new food trends**, are turning to plant proteins. At the same time, France's aging population presents a substantial market, with nearly 14 million people above the age of 65.[b] While this demographic may not show the same level of interest in plant-based diets, its sheer size nonetheless presents opportunities for stakeholders to explore innovative engagement strategies and techniques.

Globally, the protein sector is booming, with a predicted 40% increase in demand by 2030. **France has identified the growth of the plant-protein sector as a strategic imperative in order to boost food security**. Hauts-de-France has emerged as a leading region and is already producing more plant protein than any other region in the country, with the support of key players, including Roquette, Nxtfood, Ÿnsect, and Innovafeed.[c] Additionally, north-western France has become Europe's largest quinoa producer, with 400 farmers in the region harvesting 3,500 tons of white, red, and black quinoa in 2021.[d]

The plant-based-meat sector in France is aiming for price parity with conventional meat, driven by increased economies of scale and reduced margins. (Beyond Meat, for example, has committed to achieving price parity with animal-based meat in France by 2024).[e] **As plant-based meat becomes more affordable, the industry is set for transformative growth**.

These positive outcomes align with the results of the Smart Protein survey and suggest **a promising direction for France's plant-based sector**, as well as having broader implications for the global shift towards more plant-centric lifestyles.

a) GFI (2022): France plant-based food retail market insights.
https://gfieurope.org/wp-content/uploads/2023/04/2020-2022-France-retail-market-insights_updated.pdf
b) Mordor Intelligence (2023): France Plant Protein Market Size & Share Analysis.
https://www.mordorintelligence.com/industry-reports/france-plant-protein-market
c) Nord France Invest: The French Protein Industry. https://www.nordfranceinvest.com/proteins-in-hauts-de-france/
d) Taste France for Business (2022): New Industrial Tool for Quinoa d'Anjou.
https://tastefranceforbusiness.com/new-industrial-tool-for-quinoa-danjou/
e) Vegconomist (2023):Alt Meats Approach Price Parity in France as Beyond Meat Becomes 40% Cheaper.
https://vegconomist.com/food-and-beverage/meat-and-fish-alternatives/alt-meats-price-parity-france-beyond-meat/

4 key changes compared to 2021

France

Compared to the results of the 2021 report,[1] four key developments in France are evident:

No 1. In 2021, 50% of French consumers reported a decrease in their yearly meat intake.[2] In 2023, it increased to 58%.

No 2. In 2021, 37% of respondents said that they followed a flexitarian, pescatarian, vegetarian, or vegan diet.[3] In 2023, this slightly dropped to 35%, mostly as a result of fewer people identifying as flexitarian or pescetarian.

No 3. While price remains the most significant barrier to following a plant-based diet, concerns about the taste of plant-based alternatives are more prominent in 2023 than they were two years earlier, surpassing the lack of information.[4]

No 4. 37% of respondents in France said that they trust plant-based alternatives more than they did three years ago.

1) 'What consumers want: A survey on European consumer attitudes towards plant-based foods.
2) Omnivore – I frequently eat meat (such as beef, pork, chicken, turkey, fish and/or shellfish).
3) Flexitarian – I sometimes eat meat, but I am trying to reduce my meat consumption and often choose plant-based foods instead.
4) Products made solely from plant-based ingredients and are developed to resemble conventional animal-based foods such as meat or dairy. (Examples include soya burgers and soya milk).

Survey methodology
France

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.
- Countries covered by the research: France, Germany, Spain, France, Italy, the United Kingdom, Denmark, Poland, Romania, the Netherlands.

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.

Consumer attitudes & behaviours towards plant-based foods

France

Meat consumption: behaviours and attitudes

Among the countries surveyed, **France has the largest proportion of meat consumers who say that they reduced their meat intake during the previous year**, at 58%.[5] Of these consumers, 18% have decreased their meat consumption by 50% or more, while 39% have made slight reductions, falling below the 50% threshold. 34% state no change in their meat consumption, while 8% say that they have increased their meat intake. French consumers prioritize reducing beef consumption, with 57% expressing intent, whereas only 14% indicate a similar inclination towards reducing pork intake. Consumption of other animal-based products remains marginal, with less than 8% of meat or dairy consumers reporting notable changes.

The primary motive behind the reduction in meat or dairy consumption is health,[6] with 38% of respondents citing it as their leading reason. Following closely behind, 30% of people express concern for animal welfare, while 29% highlight environmental factors as their primary motivation. 21% of respondents chose 'other' as a reason for lowering their meat or dairy consumption, which may be linked to factors such as heightened price sensitivity, especially given France's rising food prices.

When compared to the total European sample, France differs slightly from the average in certain respects. While there is the positive trend of 57% of respondents reducing their beef consumption, compared to the total sample's 35%, French consumers show a much smaller reduction of pork (14%) than the overall European sample (31%), further suggesting an opportunity area for future focus.

Dietary lifestyles in France

French dietary lifestyles have not changed much since 2021. While the share of people following an omnivore, vegetarian, or vegan diet have remained the same, the proportions of flexitarians and pescetarians have slightly decreased. Currently, 65% of French respondents consider themselves to be omnivore, 25% flexitarian, 3% pescatarian, 4% vegetarian, and 2% vegan.

When asked about the duration of their selected dietary lifestyle,[7] 53% of flexitarians say that they have been following their diet for more than two years, while 48% of pescatarians, 50% of vegetarians, and 27% of vegans have been following their diet for the same period.

	2021	2023	% change
Omnivore	65	65	0
Flexitarian	27	25	-2
Pescatarian	4	3	-1
Vegetarian	4	4	0
Vegan	2	2	0

Q3: Which category best describes your current dietary lifestyle? (FR n=750)

5) Compared to a year ago, how much meat (e.g. beef, pork, chicken) are you eating now? | Single choice.
6) Which of the following reasons best describe why you have chosen to decrease your consumption of meat or dairy products? | Multiple choice.
7) How long have you been following your current dietary lifestyle? | Single choice.

Consumer attitudes & behaviours towards plant-based foods

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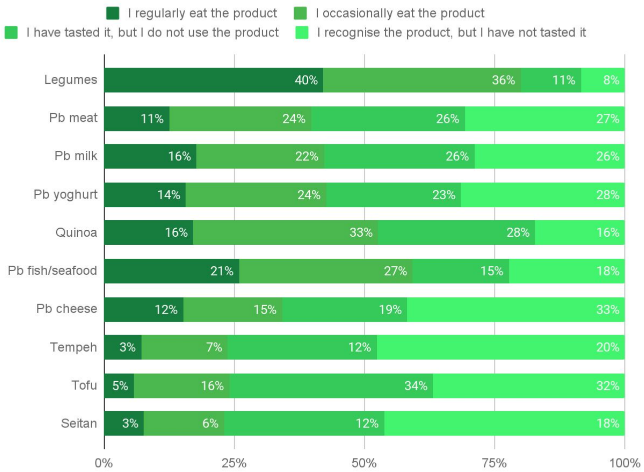
Familiarity of plant-based foods*



Q6 How familiar are you with the following food products? (FR n=750)

Legumes rank as the most familiar plant-based food in France, with 76% of respondents reporting regular or occasional consumption, followed by quinoa (50%), plant-based fish/seafood (47%), and plant-based milk or yoghurt (38%). Compared to other countries, **France stands out with the highest familiarity with quinoa** but the second lowest familiarity with seitan. In terms of future choices, 45% of respondents intend on substituting animal-based foods with legumes, 33% with legume-based foods, and 31% with plant-based dairy alternatives.

Market opportunities for plant-based alternatives

Top 5 drivers when purchasing plant-based alternatives[8]

1. Taste (52%)
2. Affordability (45%)
3. Health (39%)
4. Freshness (31%)
5. No additives/ artificial ingredients (23%)

Top 5 barriers when purchasing plant-based alternatives[9]

1. Too expensive (40%)
2. Not tasty enough (33%)
3. Need more information (25%)
4. Social unacceptance (24%)
5. Don't want to change habits (21%)

Compared to the 2021 results, taste remains the main motivator for consumers when choosing plant-based alternatives, while affordability increased in significance. Concerns about freshness declined, while there was an increase in health-related concerns about plant-based products.

When it comes to purchase location,[10] 68% of French respondents are most likely to buy plant-based alternatives at supermarkets, followed by discounters (25%), organic supermarkets (22%), and farmer's markets (17%). **Compared to other European countries, plant-based alternatives are additionally purchased in supermarkets, while discounters are less popular**. In terms of consumption location,[10] 67% of respondents are most likely to consume such products at home, 17% at conventional restaurants, 15% at plant-based restaurants, 14% via online orders or takeaways, and 11% at school or work canteens. In terms of the variety of plant-based products available,[11] 28% of respondents want to see more plant-based yoghurt, followed by more plant-based Baked goods (27%).

8) What are the most important factors when choosing plant-based food alternatives? It is important to me that the plant-based food alternatives I choose… | Multiple choice (max 5).
9) Which of the following do you encounter as barriers when choosing plant-based food alternatives?| Multiple choice (max 5).
10) Where are you likely to purchase/consume plant-based food alternatives most frequently in the future? |Multiple choice.
11) 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.
*Pb= plant-based // Legumes (e.g. lentils, chickpeas) Pb cheese (e.g. sliced/grated cheese) Pb fish/seafood (e.g. fish sticks/tuna) Pb meat (e.g. burgers/sausages) Pb milk (e.g. soy/oat milk Pb yoghurt (e.g. soy/oat yoghurt)

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Consumer attitudes & behaviours towards plant-based foods

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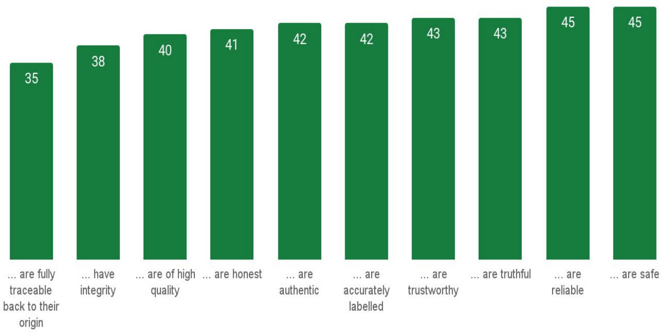
Trust levels towards alternative proteins

French consumers express the highest levels of trust in plant-based protein sources such as cereals and pulses, followed by cultivated protein (e.g. cultivated meat and dairy), fungi (e.g. mushrooms, mycelium, and yeast), and algae-based protein. Insect-based protein is the least trusted protein source in France.[12] In general, **37% of consumers trust plant-based alternatives more than they did three year ago**,[13] while 45% are unchanged, 13% have experienced a decline in trust, and 5% were uncertain. Of all the countries, France had the smallest increase in trust towards plant-based alternatives.



I trust that plant-based food alternatives... |Single choice | Total agreement level (Strongly agree + Agree + Somewhat Agree) (FR n=750)

Plant-based proteins are trusted by French consumers for their safety and reliability (45%) and trustworthiness and truthfulness (43%). However, aspects related to integrity, traceability, and high quality garnered less than 40% agreement and could be further leveraged to strengthen consumer confidence. Enhancing efforts in these areas could promote a deeper sense of trust and reliability.

The media and online influencers

In terms of the perceived quality of information that French respondents receive in mainstream online media, there are significant opportunities for leverage. Since French consumers show relatively low levels of trust in plant-based protein, there is an urgent need to enhance the quality of information provided. This is particularly important, since engaging consumers with trustworthy and informative content can bridge the trust gap and foster a more credible online environment. Our findings reveal that **59% of people take photos of food cooked at home in order to share with friends on social media**, while **58% say that they use social media to search for information** about food products or to get updates on discounts and promotions.[15]

Ranking of online medias: by trustworthiness[14]

1. Search engines (e.g Google)
2. Government websites
3. Health and/or nutrition society websites
4. Non-governmental organisation websites
5. News websites
6. Online collaborative projects (e.g Wikipedia)
7. Food-company websites
8. Online videos (e.g Youtube)
9. Social-networking sites (e.g Facebook, Instagram, Pinterest)
10. Online blogs
11. Online forums (e.g Reddit)

12) 12) 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
13) When thinking about your overall knowledge and experience with plant-based food alternatives, has your current trust increased or decreased in comparison to three years ago? |Single choice.
14) In general, how much do you trust information about plant-based food products from...| Single choice.
15) Please indicate how much you disagree or agree with each of the following statements concerning social media and food attitudes.| Single choice.

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Consumer attitudes & behaviours towards plant-based foods

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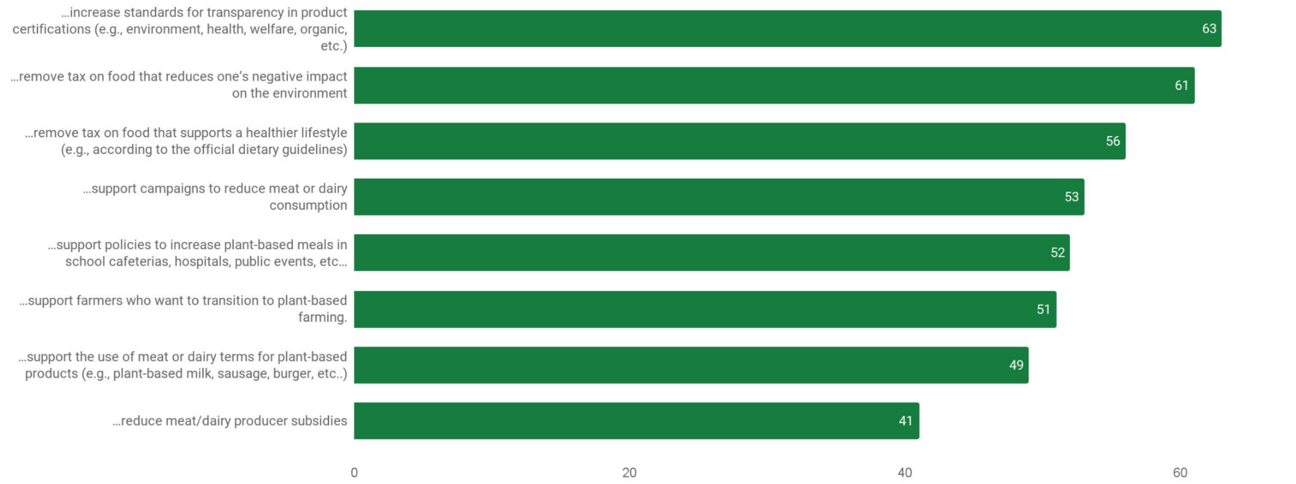
Opinion on policy



Q22: In your opinion, how much do you agree or disagree with the following statements regarding the actions that policymakers should take? I believe that my government should... | Single choice | Total agreement level (Strongly agree + Somewhat agree + Agree) (FR n=750)

French respondents are generally in favor of improving transparency standards in product certification (63%), while 61% support removing tax on food that has a less negative impact on the environment. Another 53% are in support of campaigns that reduce meat or dairy consumption, while 52% of respondents are in favour of policies that increase plant-based meals in the public sector. In general, French consumers support government action less than consumers in other European countries, possibly due to low trust levels towards plant-based alternatives. This highlights the **importance of clear communication, education, and open discussions** to build trust and demonstrate the positive impacts of proposed policies.

What trends are likely to shape the future of the plant-based market in France?

*"In France, alternatives to dairy products (plant-based milks, yoghurts, etc.) are the most widely distributed category, with a varied range of products that appeal to and satisfy consumers, and democratise plant-based eating. As for the other categories, **access to plant-based products is still too low** due to uneven distribution, especially when it comes to plant-based cheeses. On the other hand, in order to satisfy the demands of French consumers, all aspects of the product (price, nutrition, taste, quality, ethics, and packaging) need to be taken into account, as well as the fact that alternatives – particularly to meat products and cheeses – still have a poor reputation and are associated with overly processed products."*

Astrid LEFOURNIER
Responsable V-Label France

Conclusions & recommendations

France

Conclusions:

1. **Dietary shifts and motivations:** France has decreased its level of meat consumption more than most of the other countries surveyed, with this drop driven largely by concerns around health (38%), animal welfare (30%), and the environment (29%).
2. **Dietary lifestyles have stayed roughly the same:** Compared to 2021, there have been no major shifts in the diets of French consumers. The number of flexitarians (25%, compared to 27% in 2021), and pescatarians (3%, compared to 4%) has decreased slightly.
3. **Consumer preferences and challenges:** Taste remains a pivotal factor when opting for plant-based alternatives, while rising concerns about affordability pose a significant challenge. Consumer concerns about taste, lack of information, and the social acceptability of plant-based diets also remain prominent.
4. **Consumer trust:** Of all the countries surveyed, France shows the lowest levels of trust towards plant-based sources. While safety, reliability, and truthfulness are strengths, enhancing traceability, integrity, and product quality is crucial for building consumer confidence.
5. **Social influencers:** Since many consumers engage in sharing images of food on social media, this represents a key opportunity for leverage. French consumers express strong support for increased transparency standards in product certification

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Recommendations:

1. **Enhance appeal and use targeted product strategies:** Tailor marketing campaigns to highlight the health, environmental, and ethical benefits of plant-based diets, while ensuring that these campaigns resonate within the specific context of French culinary and social experiences.
2. **Enhance accessibility and visibility:** Increase the availability and visibility of plant-based products in discount retailers in order to provide competitive pricing and improved accessibility. Partner with local food producers in order to explore cost-effective solutions and expand the range of affordable plant-based options.
3. **Enhance transparency:** Boost trustworthiness in plant-based products by providing clear educational information across various touchpoints, and forming partnerships with trusted certification bodies. This could potentially increase appeal among the growing number of people who are reducing their meat consumption.
4. **Leverage social media for enhanced engagement:** Utilise social media to foster greater engagement while ensuring that your content is backed by scientific knowledge and credible sources. Partner with government agencies in order to endorse the nutritional benefits of reduced meat consumption.

THE FUTURE OF PLANT-BASED EATING IN EUROPE

Regional variations

%	AV.*	DK	DE	IT	RO	FR	NL	SP	UK	AT	PL
Meat consumers who say that they have reduced their annual meat intake	**52**	48	59	59	48	58	49	48	48	52	48
Consumers who say that they follow a flexitarian, vegan or vegetarian diet	**38**	33	55	31	35	35	47	31	38	52	26
Consumers who say that they eat plant-based foods regularly or occasionally	**36**	36	33	40	37	35	35	39	34	32	36
Consumers who are willing to increase their consumption of plant-based foods	**38**	41	36	45	40	34	33	43	37	31	37
Consumers who cite taste as a barrier	**30**	29	30	26	30	33	31	28	37	26	30
Consumers who cite price as a barrier	**38**	29	39	35	36	40	37	41	43	38	39
Consumers who trust plant-based alternatives more than they did three years ago	**46**	49	42	57	45	37	41	45	49	42	48
Consumers who support policies to increase consumption of plant-based meals	**57**	52	49	64	63	52	53	69	64	46	57
Consumers who support campaigns to reduce meat consumption	**54**	54	51	60	57	53	49	59	57	48	55

AV.: Survey Average
Green: % equal or above survey average
Yellow: % below survey average

*Average, Denmark, Germany, Italy, Romania, France, Netherlands, Spain, the United Kingdom, Austria, Poland

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Imprint

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The **Smart Protein project** 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 as well as plant-based meat, seafood, dairy products, and baked goods.

ProVeg International is a food awareness organisation working to transform the global food system by replacing 50% of animal-based products with plant-based and cultured alternatives by 2040. 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 12 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.

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