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

Poland

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Top 10 key takeaways
Polish Market

48% of meat consumers in Poland say that they have reduced their annual meat intake.

16% of Polish respondents identify as flexitarian, 5% as vegetarian, 3% as pescatarian, and 2% as vegan.

The primary motives for reducing meat or dairy consumption are **health (46%), animal welfare (33%), and the environment (21%)**.

Respondents in Poland intend substituting animal-based foods with legumes (46%), legume-based foods (42%), plant-based meat alternatives (40%), and plant-based dairy alternatives (41%).

Price (39%) **and taste** (30%) **remain the key barriers** to choosing plant-based alternatives.

48% of consumers in Poland intend purchasing plant-based alternatives from **supermarkets**, while 58% plan to buy them from **discounters**.

The most-requested plant-based alternatives are **plant-based fish/seafood** (34%), followed by **plant-based baked goods** (34%).

48% of Polish respondents say that they **trust plant-based alternatives more than they did three years ago**.

Polish respondents trust plant-based alternatives mostly due to their **safety (58%), truthfulness (58%), and accurate labelling (57%).**

62% of respondents agree with the removal of taxes on foods with a reduced environmental impact, while 59% would like policymakers to enhance transparency standards in product certification.

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Introduction

The results for Poland in the latest Smart Protein consumer survey give a good idea of the **potential of the country's plant-based sector** and suggest key opportunities for food companies to successfully expand their plant-based product ranges in both the retail and food-service sectors.

Previous research has shown that Poland has **one of the fastest growing markets for plant-based alternatives** of all the European countries surveyed.[a] In 2022, plant-based milk in Poland had a 10% share of sales of the total milk category, having increased by 41% in sales value, compared to 2020, and by 39% in terms of unit sales. Plant-based meat accounted for 15% of the pre-packaged meat market in 2022, with sales of 176 million złoty (~40 million euros). According to CMR data, the category's sales value grew by 38% during the period January-September 2023, compared to the same period a year earlier.[b] It's important to note that these increases are not solely due to inflation, as the prices of plant-based dairy is not rising as fast as their dairy counterparts. In fact, the increase is primarily due to an increase in consumer interest – in the first nine months of 2023, 27% more units of plant-based dairy were sold than during the same period in 2022.

In Poland, retail chains (mainly discounters) play a key role in the development of the market and have been regularly expanding their selection of plant-based products, often using private labels.

The country's plant-based restaurant scene provides an interesting and encouraging context for the growth of the sector, with Warsaw consistently being among the top cities in Happy Cow's annual ranking, and other Polish boasting numerous restaurants that offer attractive plant-based meals.[c]

With its rich landscape of plant-based manufacturers and animal-based producers that are developing plant-based alternatives, along with extensive support from retailers, **Poland is well positioned to respond to growing consumer demand and expand its alternative-protein sector**. The detailed consumer insights presented in this report will, we hope, contribute to and accelerate this success.

a) https://gfieurope.org/wp-content/uploads/2023/03/Polska-Analiza-rynku-detalicznego-roslinnych-alternatyw.pdf.
b) https://www.worldfood.pl/roslinne-zamienniki-nabialu/.
c) https://www.happycow.net/vegtopics/travel/top-vegan-.friendly-cities.

Survey methodology

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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 included in the survey: Austria, Italy, France, Germany, Poland, Romania, the United Kingdom, The Netherlands, Denmark, Spain

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
- 50% men, 49,9% women and 0,1% other.
- Only consumers who are responsible for household grocery shopping participated.

4 key changes compared to 2021

Poland

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

No 1. In 2021, 42% of consumers reported a decrease in their yearly meat intake.[2] In 2023, the figure increased to 48%.

No 2. In 2021, 32% of respondents said that they followed a flexitarian, pescatarian, vegetarian, or vegan diet.[3] In 2023, this decreased to 26%. The most significant decline was among flexitarians,[4] which dropped from 24% to 16%.

No 3. Concerns about the affordability of plant-based alternatives[5] are still prominent in 2023. In contrast, other factors such as lack of information, lack of support, and lack of variety are now less of an issue (although still relevant to address).

No 4. 48% of respondents in Poland 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) Meat (e.g. beef, pork, chicken).
3) Flexitarian, vegetarian, pescatarian or vegan.
4) Flexitarian – I sometimes eat meat, but I am trying to reduce my meat consumption and often choose plant-based foods instead.
5) 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).

Consumer attitudes & behaviours towards plant-based foods

Poland

Meat consumption: behaviours and attitudes

Meat consumers in Poland have shown notable shifts in their meat- and dairy-consumption habits,[5] with **48% saying that they reduced their meat intake in the previous year**. Of these respondents, 18% have significantly decreased their meat consumption – by 50% or more – while 30% have made slight reductions, falling below the 50% threshold. Conversely, 44% report no change in their meat consumption, while 6% say that they have increased their meat intake. Beef and pork have seen the most substantial reductions, accounting for 31% and 34%, respectively, of consumers decreasing their meat consumption. Changes in the consumption of other animal-based products such as milk, cheese, and eggs, remain marginal, with less than 5% of meat or dairy consumers reporting notable changes. **The most important motivation for eating less meat and dairy is health**,[6] with 46% of respondents citing it as a key reason. Following closely behind, 33% of people are concerned about animal welfare and 21% about environmental impact.

Dietary lifestyles in Poland

Despite Polish consumers saying that they have reduced their meat intake, there has been a notable increase in omnivore diets and a corresponding decrease in flexitarian diets, compared to 2021. Currently, 16% of respondents view themselves as flexitarian (8% less than in 2021), which positions **Poland as the country with the smallest share of flexitarians among the countries surveyed**. While there is an increasing interest in reducing meat consumption in Poland, consumers often do not associate their dietary habits with a specific lifestyle. As such, it is crucial to normalise the shift towards plant-based eating through targeted interventions, educational campaigns, and policy initiatives. These efforts are essential to promoting sustained behavioral change and ensure a successful transition to more plant-based diets in Poland.

	2021	2023	% change
Omnivore	68	74	+6
Flexitarian	24	16	-8
Pescatarian	2	3	+1
Vegetarian	5	5	=
Vegan	1	2	+1

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

When asked about the duration of their dietary lifestyle,[7] 38% of Polish consumers say that they have been following a flexitarian, pescatarian, vegetarian, or vegan diet for more than two years. 38% of flexitarians have been flexitarian for more than two years, while 11% of pescatarians, 53% of vegetarians, and 31% of vegans have similarly been following their diets for two years or more. These results indicate that, despite Poland's relatively low adoption of a plant-based lifestyle in Europe, **those who have already embraced this lifestyle demonstrate a notable long-term commitment to their dietary choices**.

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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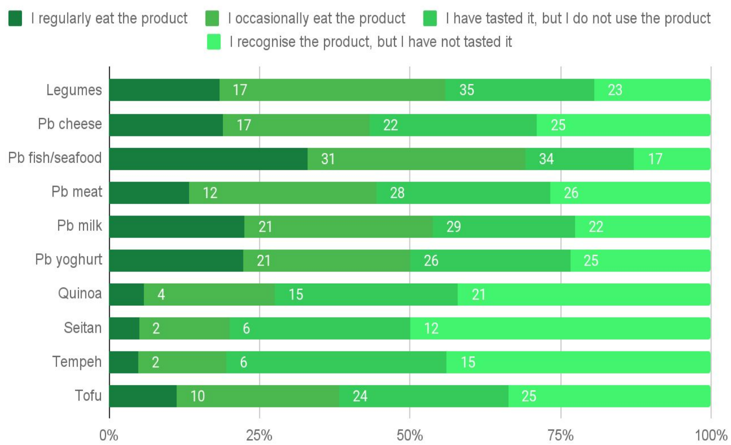
Familiarity of plant-based foods*



Plant-based fish is the most-familiar plant-based food in Poland, with 65% of respondents reporting at least occasional consumption, followed by legumes (52%), milk (50%), and yogurt (47%). When asked about their likely future behaviours, **39% of Polish respondents expressed a willingness to replace animal-based foods with legume-based foods and plant-based dairy alternatives**, followed by legumes (35%) and plant-based meat alternatives (33%).

Market opportunities for plant-based alternatives

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

1. Taste (51%)
2. Health (51%)
3. Freshness (47%)
4. Price (46%)
5. Availability (26%)

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

1. Too expensive (39%)
2. Not tasty enough (30%)
3. Lack of information (29%)
4. Lack of support from friends/family (24%)
5. Lack of knowledge for preparation (23%)

Compared to the 2021 results, **taste is now the most significant barrier for Polish consumers when it comes to choosing plant-based alternatives**, while affordability continues to be a notable concern. Concerns about limited variety have decreased, while health-related concerns and uncertainty regarding the preparation of plant-based products have increased.

When it comes to purchase location,[10] 48% of consumers are most likely to buy plant-based alternatives at supermarkets, while 58% in discounters, making Poland **the country that relies the most on discounters** of all the countries surveyed. In terms of consumption location,[10] **69% of respondents are the most likely to consume such products at home**, while 27% prefer to consume them at conventional restaurants, 18% consume them at plant-based restaurants, 17% rely on online orders or takeaways, and 11% opt for school or work canteens. In terms of the variety of plant-based products available at any point of purchase or consumption,[11] **34% want to see more plant-based fish products and baked goods**, while 32% want to see more plant-based yogurt and 31% milk products.

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 ch
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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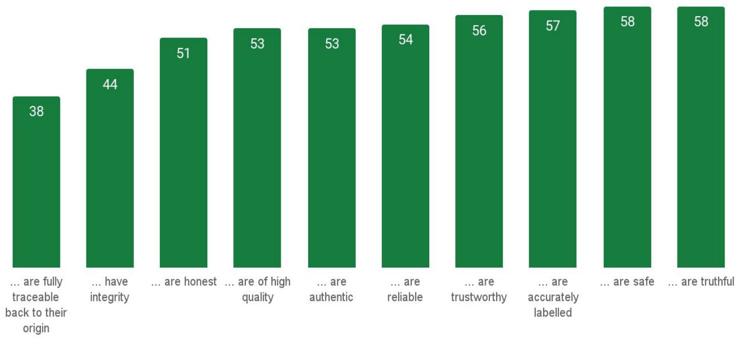
Trust levels towards alternative proteins

Polish consumers express the highest levels of trust in plant-based protein sources such as cereals and pulses, followed by fungi (e.g. mushrooms, mycelium, and yeast) and algae-based protein. Insect-based protein is the least trusted protein source in Poland.[12] In general, **48% of consumers trust plant-based alternatives more than they did three year ago**,[13] while 34% express the same level of trust, 14% said that they trusted plant-based alternatives less now, and 4% were uncertain.



Plant-based proteins are trusted in Poland mostly for their safety (58%), truthfulness (58%), and accurate product labeling (57%). However, aspects related to traceability and integrity garnered less than 50% of agreement, and represent areas where consumer confidence could be strengthened.

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

The media and online influencers

In terms of the perceived quality of information that Polish respondents receive in mainstream online media, there are notable opportunities for engagement and influence. For instance, search engines and health-society websites are regarded as highly trustworthy. Uniquely, compared to other countries in this study, Poland exhibits a larger amount of online media users that trust online videos and collaborative projects such as Wikipedia. However, Poland is distinct in its low trust in government websites. **This underscores a crucial need for the government to reconsider its communication strategies, particularly regarding plant-based diets and products**.

Ranking of online media, by trustworthiness[14]

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

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.

Consumer attitudes & behaviours towards plant-based foods

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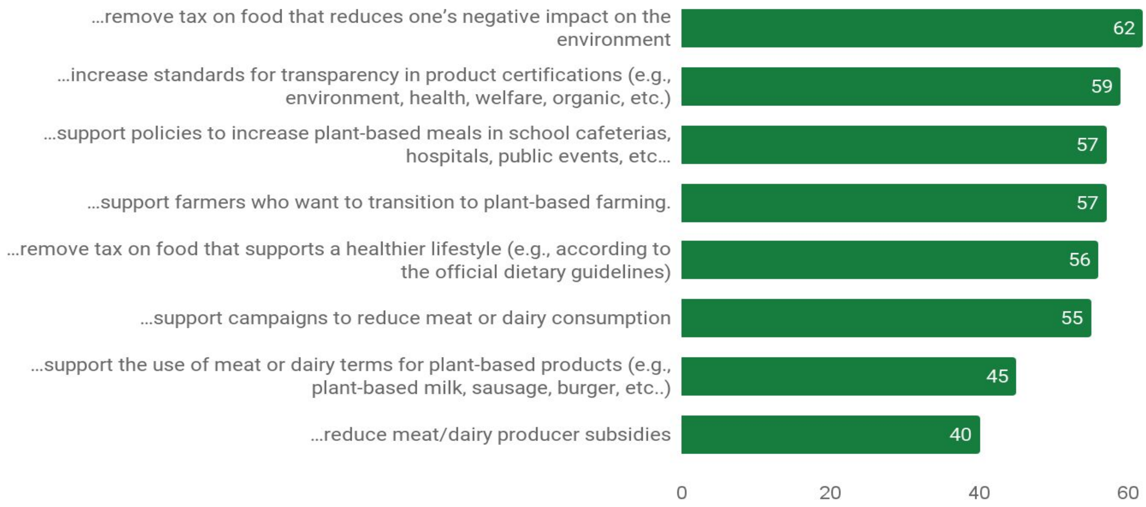

Q22: In your opinion, how much do you agree or disagree with the following statements regarding the actions that policymakers should take? I believe that my government should... | Single choice | Total agreement level (Strongly agree + Somewhat agree + Agree) (PL n=750)

Polish respondents are generally in favor of tax exemption on foods that minimise their environmental impact (62%) and which support a healthier lifestyle (56%), while 59% also want more transparency in food certifications. Additionally, a significant 57% are in favour of more plant-based options in public institutions. However, less than half of respondents are comfortable with plant-based products using traditional meat and dairy terms or with reducing subsidies for animal agriculture. This suggests **marketing challenges for plant-based products** as well as the need for **complex policy considerations** around meat and dairy subsidies. Such strategic approaches will need to balance consumer attitudes and industry interests in Poland.

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

"Despite the difficult macroeconomic situation (e.g. inflation), interest in plant-based products in Poland continues to grow. In 2023, we observed several interesting debuts from both foreign producers (e.g. Oatly and Oddlygood) and major Polish companies (e.g. Maspex's 'Just Plants' line and Mlekovita's 'Vegevita' line) as well as from retail chains, which are increasingly eager to develop their own brands. Manufacturers are outdoing themselves in innovation, basing their products on new raw materials (e.g. hemp, lupine, nuts) and entering categories that are new to the Polish market (e.g. egg alternatives and various types of fish alternatives)".

Marcin Tischner
Public Affairs Coordinator & Sustainability Expert, ProVeg Poland

Conclusions & recommendations

Poland

Conclusions:

1. **Dietary shifts and motivations:** The consumer landscape in Poland shows a noticeable shift away from meat and dairy consumption, driven mostly by health concerns, animal welfare, and environmental awareness.
2. **The ongoing evolution of dietary lifestyles:** While there is increasing interest in reducing meat consumption in Poland (48%), consumers often do not associate their plant-based dietary habits with a specific vegan, vegetarian, or flexitarian lifestyle, potentially contributing to the relatively high levels of self-identification as primarily omnivore (74%).
3. **Consumer preferences and challenges:** Taste is becoming a pivotal factor when it comes to choosing plant-based alternatives, while concerns about affordability continue to pose a significant challenge. Concerns regarding insufficient information and support from family or friends continue to be prevalent.
4. **Consumer trust:** While Polish consumers express trust in plant-based protein sources, they would like to see improved traceability and greater integrity.
5. **Social influencers:** Polish online media users tend to place more trust in online videos and, collaborative platforms such as Wikipedia and YouTube, and less trust in government websites. This suggests a critical need to enhance the government's communication strategy around plant-based products.

Recommendations:

1. **Bridge the gap between intent and action:** Launch targeted educational campaigns in order to raise awareness about the nutritional value and availability of plant-based products.
2. **Address information gaps and social-acceptance concerns:** Foster community support and promote the cultural acceptance of plant-based options through culinary events and collaborations in order to help overcome social barriers.
3. **Increase product variety and visibility in order to meet high potential demand:** Expand the availability and visibility of plant-based alternatives, especially in discount stores, with a particular focus on plant-based fish and dairy products.
4. **Enhance product integrity and strengthen marketing strategies:** Ensure clear and transparent labeling that accurately describes a product's ingredients and functionality. Use terms that clearly convey that the product is plant-based.
5. **Advocate for enhanced government communication strategies:** Develop well-researched policy proposals that stress the need for enhanced communication strategies, detailing their potential benefits for society, the economy, and the environment.

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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