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

Romania

proveg international

smart protein

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No. 862957

Top 10 key takeaways
Romania

48% of meat consumers in Romania say that they have reduced their yearly meat intake.

27% of Romanian respondents identify as flexitarian, 2% as vegetarian, 2% as vegan, 3% as pescatarian, and 65% as omnivore.

The primary motives for reducing meat or dairy consumption are **health** (57%), **social environment** (14%), and **animal welfare** (13%).

Romanian respondents intend on substituting animal-based foods with legumes (49%), legume-based foods (41%), plant-based dairy alternatives (38%), and plant-based meat alternatives (32%).

Price (36%) and **lack of information** (31%) **remain the key barriers** to choosing plant-based alternatives.

53% of Romanian consumers intend to purchase plant-based alternatives from **discounters**, while 51% plan to buy them from **supermarkets**.

The most requested plant-based alternatives are **plant-based sweets and snacks** (39%), followed by **baked goods and plant-based cheese** (32%).

45% of Romanian respondents say that they **trust plant-based alternatives more than they did three years ago**.

Romanian respondents trust plant-based alternatives mostly due to their **safety** (51%), **reliability** (51%), and **authenticity** (49%).

68% of respondents agree with **the removal of taxes on foods with a reduced environmental impact**, while 67% agree with the removal of taxes on food supporting **healthier lifestyle**.

smart protein

proveg international

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

Romania

Introduction

Although the plant-based food sector in Romania is still in its early stages and is primarily focused on plant-based milk and meat, the growth trajectory nonetheless aligns with global trends. Romania is emerging as a promising player with a robust 23% growth in sales over the last two years covered by the survey, reaching €33.4 million in 2022. Despite having the lowest sales value and per-capita spend among the countries surveyed, Romania's plant-based sector is rapidly evolving, suggesting a tendency to embrace more plant-based diets.[a]

Our research emphasises the **significant potential of Romania's plant-based market sector** and suggests **promising opportunities for both retail and food-service companies** to expand their plant-based portfolios.

Romania is **deeply intertwined with Ottoman, Hungarian, and Eastern European influences** and has strong agricultural traditions and a preference for locally sourced fresh ingredients. The results of our study highlight the fact that Romanian consumers prioritise freshness when choosing plant-based alternatives.

Romania and its neighbouring countries are currently undergoing shifts in dietary patterns and food choices.[b] This has led to a heightened dietary awareness, with health being a key concern, driving a notable shift towards plant-based diets that is fusing with traditional cuisine.

Our study shows that, despite a lack of information, Romania is one of the countries that is most supportive of plant-based options. Responding to the growing demand for plant-based products, retail giants such as Carrefour and Lidl are taking proactive measures. Carrefour has strategically expanded its portfolio, focusing on the development of fresh and frozen, ready-to-eat plant-based meals. Lidl has also collaborated with local producers, diversifying its range of Romanian plant-based foods under its Vemondo brand.[c] This **reflects a broader European shift towards promoting affordable and accessible plant-based options**.

Looking ahead, the positive outcomes observed align with the broader trends identified in the Smart Protein consumer survey, suggesting **a promising trajectory for Romania's plant-based sector**.

a) GFI (2022): Romania plant-based food retail market insights.
https://gfieurope.org/wp-content/uploads/2023/04/2020-2022-Romania-retail-market-insights_updated.pdf.
b) Vegan Society Romania (2023): Tierprodukte am österreichischen Markt immer unbeliebter. https://www.vegan.at/versorgungsbilanzen-neu.
c) BNP (2023): Romania's Plant-based Food Market Flourishes Amid Rising Health Consciousness
https://bnnbreaking.com/lifestyle/food/romanias-plant-based-food-market-flourishes-amid-rising-health-consciousness/.

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

Romania

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 to compare changes in behaviours and attitudes over the last two years.
- Countries covered by the research: Romania, 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.

smart protein
proveg international

4 key changes compared to 2021

Romania

In comparison to the results of the 2021 report,[1] four key developments in Romania are evident:

No 1. In 2021, 52% of Romanian consumers reported a decrease in their yearly meat intake.[2] In 2023, the figure slightly dropped to 48%.

No 2. In 2021, 54% of respondents said that they followed an omnivore diet. In 2023, this increased to 65%. The percentage of flexitarians decreased from 40% in 2021 to 27% in 2023.

No 3. Concerns about the affordability of plant-based alternatives[4] are more prominent in 2023 than they were two years earlier, with cost now ranking as the most significant barrier to following a plant-based diet.

No 4. 45% of respondents in Romania say 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 me or dairy. (Examples include soya burgers and soya milk).

smart protein

proveg international

Consumer attitudes & behaviours towards plant-based foods

Romania

Meat consumption: behaviours and attitudes

Meat consumers in Romania have shown notable shifts in their consumption of meat and dairy,[5] with **48% having reduced their meat intake during the previous year**. Of these respondents, 15% have significantly decreased their consumption – by 50% or more – while 33% have made reductions that fall below the 50% threshold. Conversely, 40% report no changes in their levels of meat consumption, while 12% say that they are eating more meat. Pork and beef have seen the most substantial reductions, accounting for 47% and 23%, respectively, among the choices provided. Changes in the consumption of other animal-based products are marginal, with less than 6% of meat or dairy consumers reporting notable changes. **The primary motive behind the reduction in meat or dairy consumption is health**,[6] with 57% of respondents citing it as their leading reason. Following closely behind, 12% of people are concerned about animal welfare and 12% about environmental impact.

Compared to the total European sample, Romania shows a slight deviation from the average in certain respects. **Just under half of Romanian consumers (47%) are reducing their rate of pork consumption, which is 16% higher than Europe as a whole**. On the other hand, only 23% of Romanian consumers have reduced their beef consumption, which is significantly lower than the overall European figure of 35%.

Dietary lifestyles in Romania

In Europe, compared to 2021, Romania stands out as the country showing the highest **increase in the number of omnivores**, paired with a **substantial decrease in the number of flexitarians**. Currently, 65% of Romanian respondents identify as omnivore (11% more than in 2021) and 27% as flexitarian (13% less than in 2021), while 3% identify as pescatarian, 2% as vegetarian, and 2% as vegan. Despite market growth and efforts to reduce meat consumption, this shift may be influenced by economic factors, traditional eating habits, supply chain disruptions, and health concerns.

When asked about the duration of their selected dietary lifestyle,[7] **45% of Romanian consumers say that they have been following a flexitarian diet for more than two years**, while 35% of pescatarians, 33% of vegetarians, and 41% of vegans have similarly been following their diets for two years or more.

	2021	2023	% change
Omnivore	54	65	+11
Flexitarian	40	27	-13
Pescatarian	3	3	0
Vegetarian	3	2	-1
Vegan	1	2	+1

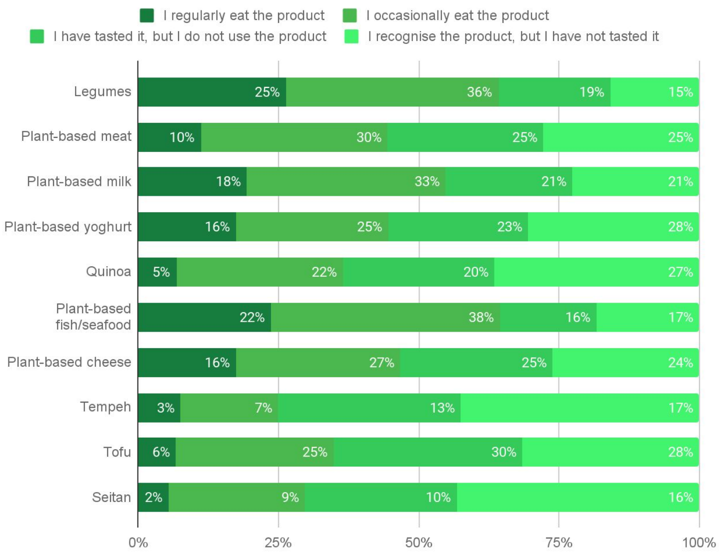
Q3: Which category best describes your current dietary lifestyle? (RO n=750)

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? | M
7) How long have you been following your current dietary lifestyle? | Single choice

Consumer attitudes & behaviours towards plant-based foods

Romania

Familiarity of plant-based foods*



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

Legumes rank as the most familiar plant-based food in Romania, with 61% of respondents reporting regular or occasional consumption, followed by plant-based fish and seafood (60%), milk (51%), and cheese (43%).

When asked about their future behaviours, **49% of respondents said that they intend on substituting animal-based foods with legumes**, while 41% are likely to do so with legume-based foods, and 38% with plant-based dairy alternatives. Overall percentages are lower than in other countries surveyed, highlighting the need to make plant-based options more appealing to Romanian consumers.

Market opportunities for plant-based alternatives

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

1. Health (51%)
2. Taste (51%)
3. Freshness (48%)
4. Affordability (42%)
5. No additives (29%)

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

1. Too expensive (36%)
2. Need more information (31%)
3. Not tasty enough (30%)
4. Don't want to change routine (26%)
5. Worried about health (25%)

Compared to 2021, **health is now the main motivator** for consumers when choosing plant-based alternatives. **Affordability has increased in significance** as a key motivator, while texture has decreased in importance. Concerns about freshness declined, while there was an increase in **health-related concerns**.

When it comes to purchase location,[10] Romania has the second-highest percentage of consumers who shop at discounters, at 53%. Just over half of consumers (51%) shop at supermarkets, and 21% at farmers' markets. In terms of consumption location,[10] **67% of respondents are most likely to consume plant-based alternatives at home**, 27% at conventional restaurants, 19% at plant-based restaurants, 17% through online orders or takeaways, and 8% at school or in work canteens. In terms of the variety of plant-based products available,[11] 39% of Romanian consumers would like to see **more plant-based sweets and snacks** (such as chocolate, chips, and cookies), and 32% would like to see a better selection of plant-based cheeses (32%).

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)

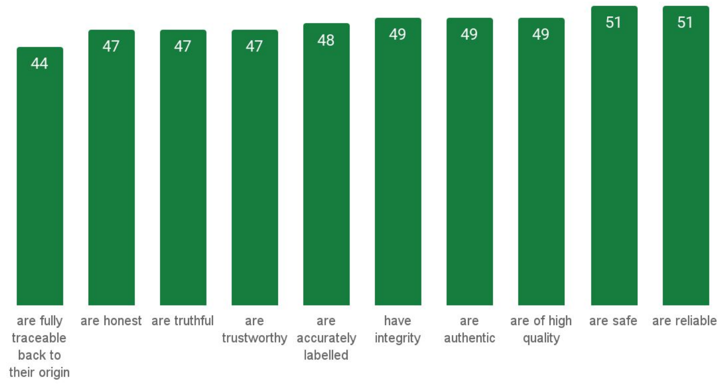
smart protein
proveg international

Consumer attitudes & behaviours towards plant-based foods

Romania

Trust levels towards alternative proteins

Romanian consumers trust plant-based protein sources such as cereals and pulses the most, followed by fungi (e.g. mushrooms, mycelium, yeast) and cultivated protein (e.g. cultivated meat and dairy). They trust insect-based protein the least, followed by algae-based protein.[12] Compared to 2021, plant-based protein has gained the most momentum, with **45% of respondents saying that they trust plant-based alternatives more than they did three year ago**.[13] On the other hand, 39% are neutral on the matter, 14% trust plant-based alternatives less, and 3% are uncertain.



Q20: I trust that plant-based food alternatives... | Single choice | Total agreement level (Strongly agree + Agree + Somewhat Agree) (RO n=750)

Plant-based proteins are trusted mostly for their **reliability and safety** (51%) and their **authenticity, integrity, and high quality** (49%). However, only 44% of respondents trust that plant-based alternatives are fully traceable back to their origin. This aspect could be further leveraged to strengthen consumer confidence in these products. Improving transparency in the value chain will bolster consumer confidence and promote a deeper sense of trust and reliability in plant-based products.

The media and online influencers

In terms of the perceived quality of information in mainstream Romanian online media, there are significant opportunities for improved leverage. Our findings show that **64% of people use social media to search for information about food products, as well as for reading opinions about food products from people with similar interests**. Additionally, 60% said that they use social media to get updates on discounts and promotions on food products.[15]

Ranking of online medias, by trustworthiness of information:[14]

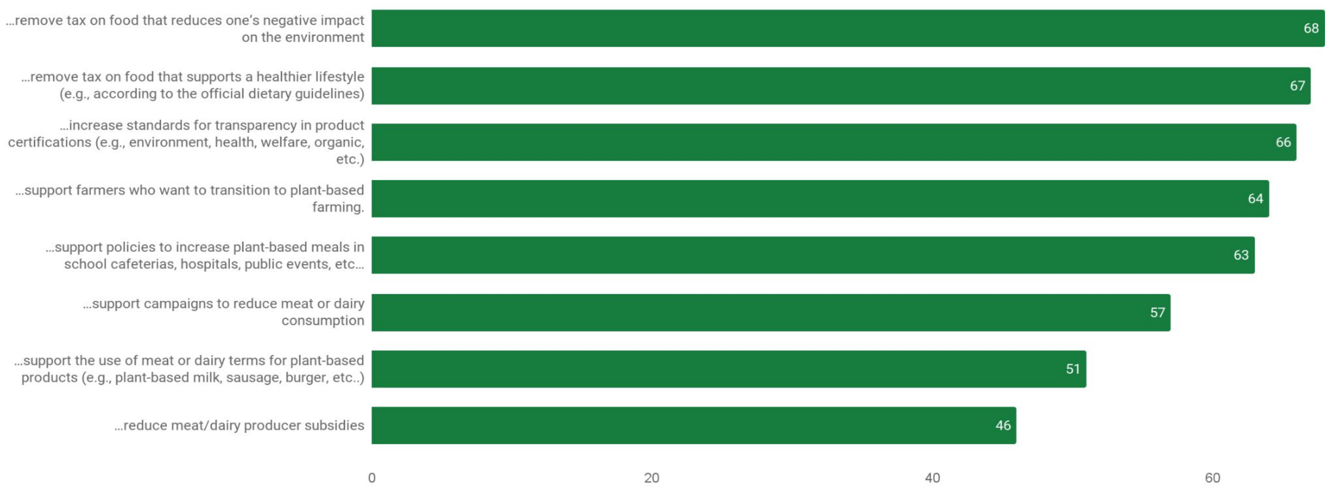
1. Search engines (e.g. Google)
2. Health and/or nutrition society websites
3. Online videos (e.g. Youtube)
4. Food-company websites
5. Online collaborative projects (e.g Wikipedia)
6. News websites
7. Social-networking sites (e.g Facebook, Twitter, Instagram, Pinterest)
8. NGO websites
9. Government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

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

Romania

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) (RO n=750)

Romanian respondents are generally in favor of tax exemptions on foods that have a lower environmental impact (68%) and which support **a healthier lifestyle** (67%), while 66% support enhanced standards for transparent product certification. Another 64% agree with supporting farmers who want to transition to plant-based farming, while 63% think that policymakers should support policies that increase plant-based meals in the public sector. Notably, Romania shows relatively strong endorsement of political action, compared to other European countries. This highlights the **importance of policymakers ensuring access to tasty, high-quality food that is sustainable and healthy**.

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

"In Romania, there's a strong demand for legume-based dishes, along with plant-based dairy and meat alternatives. To capitalize on this trend, it's crucial to ensure these options are not only affordable but also align with local tastes for freshness and quality. Meanwhile, 68% of Romanians are calling for tax incentives on foods that are both healthier and more eco-friendly. This is a clear signal to policymakers: it's time to support these sustainable choices. By making plant-based options more accessible and raising awareness, we can drive a significant shift towards a healthier, more sustainable future.

Mathilde Alexandre
International Head of Corporate & Institutional Engagement, ProVeg International

Conclusions & recommendations

Romania

Conclusions:

1. **Dietary shifts and motivations:** The consumer landscape in Romania shows a noticeable shift away from meat and dairy consumption, driven largely by health concerns (57%), animal welfare (13%), and environmental awareness (12%).
2. **Dietary lifestyles are changing:** Compared to 2021, there has been a noticeable shift in dietary lifestyles, with 11% more people identifying as omnivores and a 13% drop in the number of flexitarians.
3. **Consumer preferences and challenges:** Health, taste, and freshness are pivotal factors when it comes to choosing plant-based alternatives. Affordability poses a key challenge, while consumer concerns around taste and lack of information and remain prominent.
4. **Consumer trust:** Romanian consumers trust plant-based sources more than they did three years. However, improving perceptions of safety, reliability, traceability, honesty, and truthfulness are all crucial to building consumer confidence.
5. **Social influencers:** Social media has a significant influence on consumer behaviour in Romania, with the majority of respondents using it as a source of information about food and food products.
6. **Government initiatives:** Romanian consumers strongly support government initiatives that promote healthier and more environmentally friendly food choices, especially when it comes to tax exemptions on healthy and sustainable food.

Recommendations:

1. **Health-oriented innovation:** Continue to inform consumers about the health benefits of plant-based diets by partnering with educational institutions and community organisations to disseminate transparent and accurate information on the advantages of adopting plant-based lifestyles.
2. **Increase appeal of plant-based diets:** Normalise plant-based diets by integrating plant-based choices in dining and retail, fostering acceptance. Build community spaces for sharing experiences and recipes to cultivate a shared identity.
3. **Affordability solutions:** Explore ways to make plant-based options more accessible and affordable. Consider implementing different pricing strategies in order to overcome the issue of affordability.
4. **Promote local partnerships:** Foster partnerships with local producers and retailers to expand the availability and accessibility of plant-based options. Collaborate with retailers to strategically position plant-based products and capitalise on the growing demand for healthy and sustainable food choices.

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

smart protein

proveg international

Imprint

Evolving appetites: An in-depth look at attitudes towards plant-based eating in Romania is published by ProVeg International as part of the Smart Protein project. Smart Protein has received funding from the EU research and innovation programme Horizon 2020, under grant agreement No 862957.

Date of publication: March 2024

Research, editorial, and project team: Elsa Guadarrama, Ajsa Spahic, Paloma Nosten, Peter Machen, Bella T. Fong

This study was conducted by ProVeg International in partnership with Innova Market Insights, the University of Copenhagen, and Ghent University. Any reproduction of this publication, in part or in full, must mention its title and the publisher as the copyright holder. Recommended citation format: "Evolving appetites: An in-depth look at attitudes towards plant-based eating". The European Commission is not responsible for any use that may be made of the information contained in this report.

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.

ProVeg e.V., Genthiner Straße 48, 10785 Berlin
Email: info@smartproteinproject.eu