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

Evolving appetites: an in-depth look at European attitudes towards plant-based eating.

A follow-up to the 2021 survey report, '*What Consumers Want*'

November 2023

www.smartproteinproject.eu

Presenters of today's webinar

Elsa Guadarrama

Consumer Research Manager
at ProVeg International

Gemma Tadman

Business and Communication Manager
at ProVeg International

info@smartproteinproject.eu

Content Overview

I. What is ProVeg International & what is the Smart Protein Project?

II. Setting the scene: Current meat consumption outlook

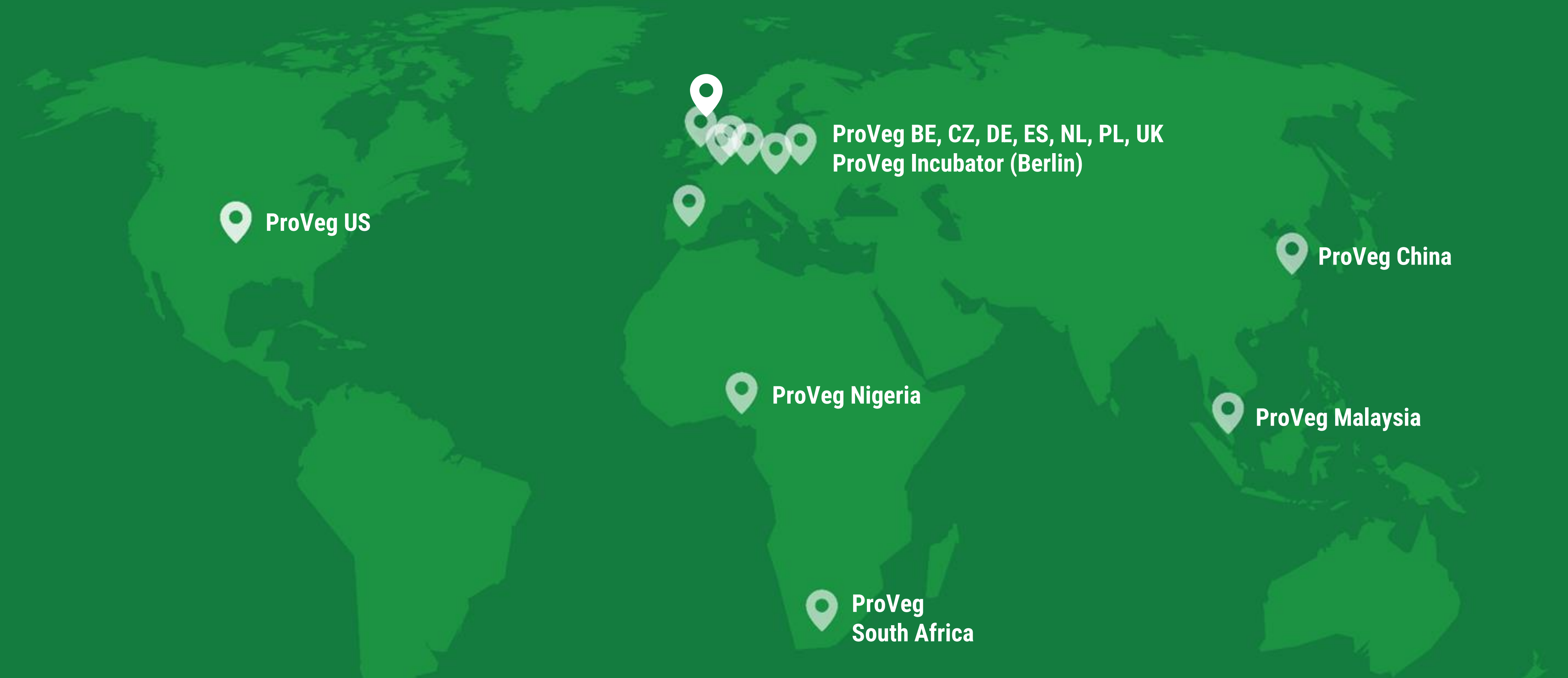
III. European behaviours regarding meat consumption

IV. European behaviours regarding plant-based food consumption

V. European behaviours regarding plant-based alternatives

VI. Conclusions and recommendations

VII. Q&A



ProVeg International is a food awareness organization working to transform the global food system.

Our Mission: Replace 50% of animal products globally with plant-based and cultivated foods by 2040.

United Nations Economic and Social Council (ECOSOC)

Special Consultative Status

United Nations Environment Assembly (UNEA)

Accredited Organisation

Intergovernmental Panel on Climate Change (IPCC)

Observer Status

MOMENTUM FOR CHANGE

United Nations Framework Convention on Climate Change (UNFCCC)

Observer Status

The Smart Protein Project, is a €10 mi. EU-funded Farm to Fork initiative involving 33 partners from over 20 countries.

Horizon2020
European Union Funding
for Research & Innovation

WP4 – Food nutrition and health

Objectives: Optimisation of the nutritional and biological profile of the Smart Protein food ingredients/foods/beverages plant based products prototyped via human intervention studies.
Key players: Food and beverage industries

WP3 – Food processing

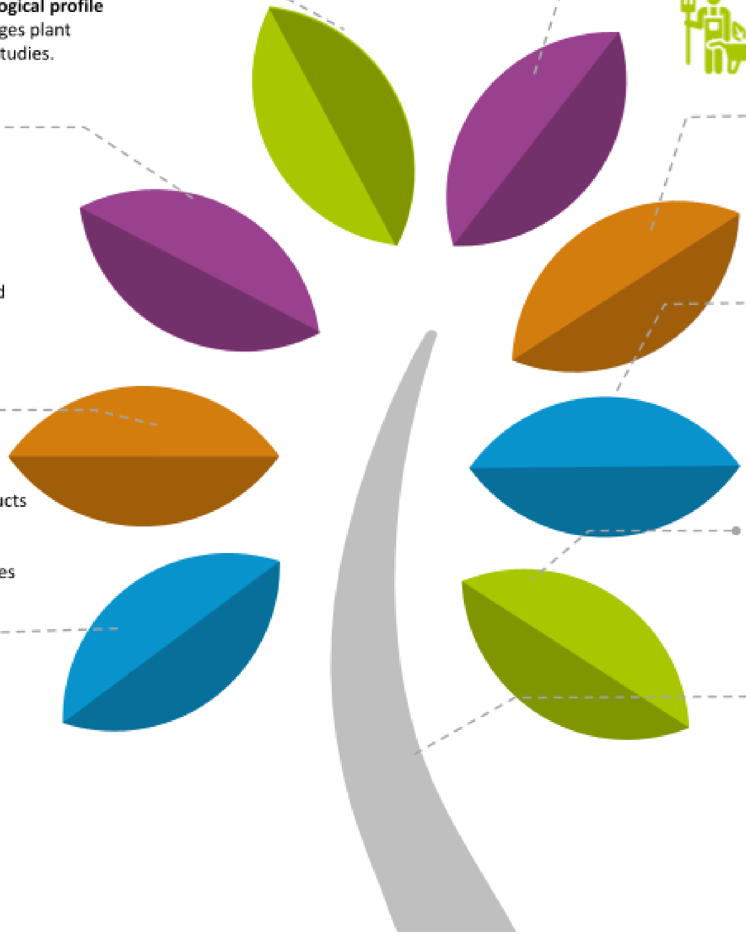
Objectives: Protein-protein interaction, protein functionality, development of food ingredients/foods/beverages plant based products. Formulate protein combinations for partial or full substitution of protein sources traditional utilised. Industrial validation and demonstration of developed food and beverage prototypes.
Key players: Food and beverage industries

WP2 – Plant protein processing and side stream up-cycling

Objectives: Protein extraction validation at the industrial environment, up-cycling side-stream products generates from Smart Protein partners, mycelium, mushroom protein production.
Key players: Food and beverage ingredients companies

WP1 – Protein crop, soil and water management

Objectives: Water management, soil fertility protection, protein crops validation and production strengthening.
Key players: Farmers, farmers support associations, plant breeders



WP5 – Exploitation & business development

Objectives: Assessment of the commercial feasibility and safety of protein channels through its live interaction among the WP1-WP4 – Business case-development
Key players: Farmers/Industries/Food retailers, consumers/support, associations

WP6 – Consumer studies

Objectives: Development and implementation of plant-based food and beverage prototypes to enhance consumer's acceptance, consumer readiness, network and promoting activities.
Key players: Food retailers, consumers/support associations

WP7 – Dissemination and communication

Objectives: Disseminate, exploit and communicate the results of the Smart Protein project within and outside the consortium to the public and relevant professional sectors such as food industry, manufacturing and production, food and regulatory authorities.
Key players: Farmers/Industries/Food retailers, consumers/support, associations, policy makers

WP8 – Sustainability Assessment

Objectives: Environmental impact profiles of protein food covering the whole protein food supply chain (from cradle to grave).
Key players: Farmers/Industries/Food retailers, consumers/support, associations, policy makers

WP9 – Project management and coordination

Objectives: Overall management of the project, establishment of an effective communication infrastructure and foster the integrative process within the consortium, ensure consortium's performance.

Research Methodology

20-minute-long online questionnaire

FW: June 2021 and June 2023

7,500
EU Respondents
(quotas age and gender)

Austria, Denmark, France, Germany, Italy, The Netherlands, Poland, Romania, Spain, UK

Consumer Survey

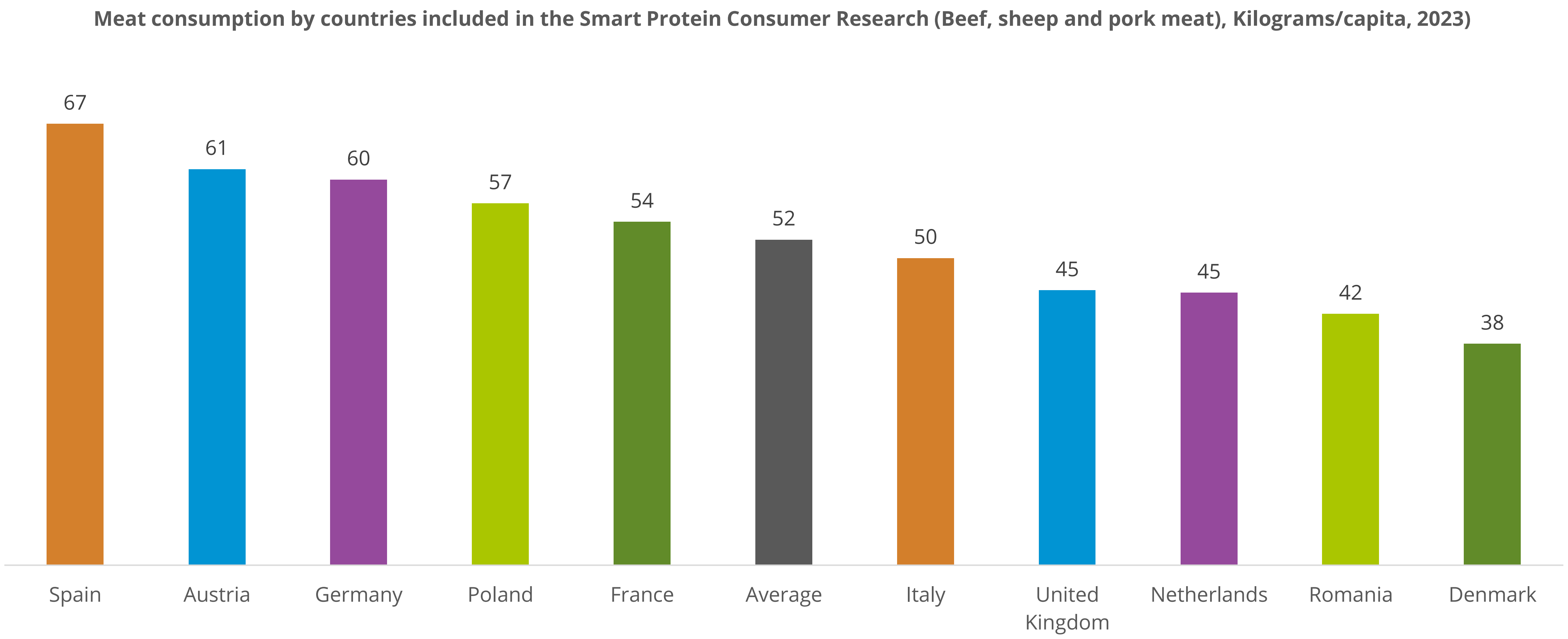
Consumer Attitudes	Consumer Behaviors	Market Opportunities	Trust	Opinions on Policy	Social Media
Dietary Lifestyle	Product Familiarity	Drivers	Increase/ decrease of trust	Opinion on what to implement	Social media frenq. usage
Motivations	Consumption frequency	Barriers	Trust by statements		Social media - engagement
Food related lifestyles - dimension	Extent of Reduction of meat	Place of purchase	Trust by types		Social media - situations
Food related lifestyles - dimension: PRICE, ORGANIC, TASTE	Intent to replace, consume, purchase	Place of consumption	Media trust		Social media - attitudes
COM-B Model	Consumption frequency	Product expectations			

→ 18+ & only consumers who are responsible for household grocery shopping participated

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

III. European behaviours regarding meat consumption

Spain, Austria and Germany lead the charts in red meat consumption across selected European countries.



Source: Meat Consumption by Country 2023, World Population Review. https://worldpopulationreview.com/country-rankings/meat-consumption-by-country

The European commission scenario: A weekly max. intake of red/processed meat of 500 gr. or up to 3 times per week.

European Commission scenario
500 g per week

Current EU scenario
~700 g per week

Source: European Commision (2023) Food-Based Dietary Guidelines in Europe // OECD-FAO Meat Consumption Data (2023): https://data.oecd.org/agroutput/meat-consumption.htm

Poll: Meat consumption

Compared to a year ago,
how much meat are **<u>you</u>** eating now?

In 2023, 51% of European meat consumers are reducing their annual meat intake, up from 46% in 2021.

Actual meat consumption vs a year ago (%)

	2023	2021
A lot less	**15**	**14**
Slightly less	**36**	**32**
No change	39	48
Slightly more	7	5
A lot more	2	1

Q8: Compared to a year ago, how much meat (e.g. beef, pork, chicken) are you eating now? | Single choice

Total: n= 6676 | Austria n=639 | Denmark n=649 | France n=682 | Germany n=639 | Italy n=688 | Netherlands n=663 | Poland n=675 | Romania n=695 | Spain n=699 | UK n=650

High meat-consuming countries report the highest annual reductions in meat intake, except for Spain and Poland.

Actual meat consumption vs a year ago (%)

In order of kg of red meat per year*

Total	**51**
Spain	48 !
Austria	**51**
Germany	**59**
Poland	48 !
France	**57**
Italy	**59**
UK	48
Netherlands	49
Romania	48
Denmark	47

Prioritize educational campaigns in Spain and Poland aimed at reducing meat consumption.

**Source: Meat Consumption by Country 2023, World Population Review. https://worldpopulationreview.com/country-rankings/meat-consumption-by-country*

Q8: Compared to a year ago, how much meat (e.g. beef, pork, chicken) are you eating now? | Single choice

Total: n= 6676 | Austria n=639 | Denmark n=649 | France n=682 | Germany n=639 | Italy n=688 | Netherlands n=663 | Poland n=675 | Romania n=695 | Spain n=699 | UK n=650

Beef and pork consumption has substantially declined, while dairy products show only a minor reduction

Decrease of food consumption (%) – Total sample

	2023
Beef	**35%**
Pork	**31%**
Fish	7%
Poultry	6%
Milk	6%
Cheese	5%
Eggs	4%
Yoghurt	3%
I don't know	3%

Q9: For which of the following food products have you decreased your consumption of the most? | Multiple choice

Total: n= 7500

Health is the primary reason to reduce meat consumption, followed by animal welfare and the environment.

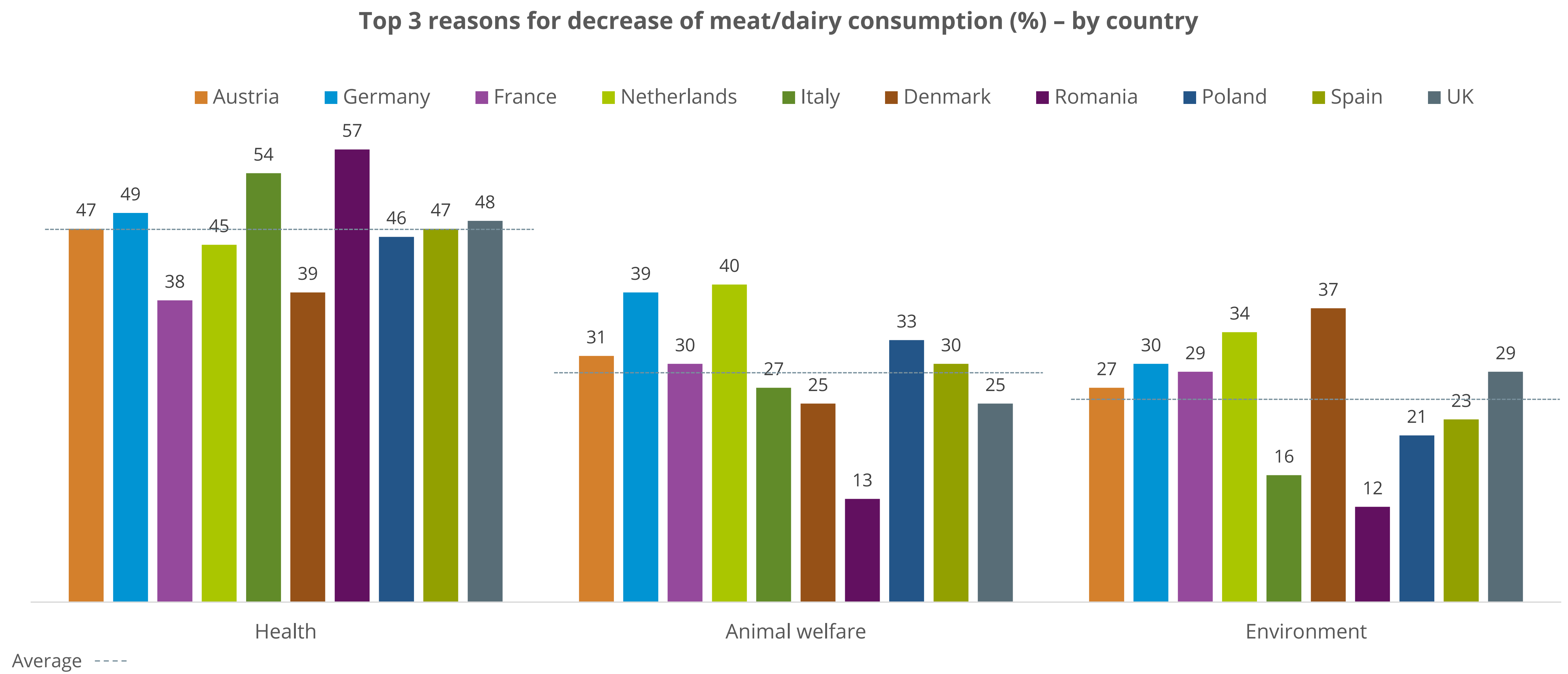
Reasons for decrease of meat/dairy consumption (%)

Health	**47**
Animal welfare	**29**
Environment	**26**
Taste	15
Concerns over antibiotics	15
Other	12
My social environment	10
Major outbreaks of animal-to-human diseases (e.g. COVID-19)	9

Q10: Which of the following reasons best describe why you have chosen to decrease your consumption of meat or dairy products? | Multiple choice

Total: n= 6676 | Austria n=639 | Denmark n=649 | France n=682 | Germany n=639 | Italy n=688 | Netherlands n=663 | Poland n=675 | Romania n=695 | Spain n=699 | UK n=650

Reasons to decrease meat consumption vary across countries.



Q10: Which of the following reasons best describe why you have chosen to decrease your consumption of meat or dairy products? | Multiple choice

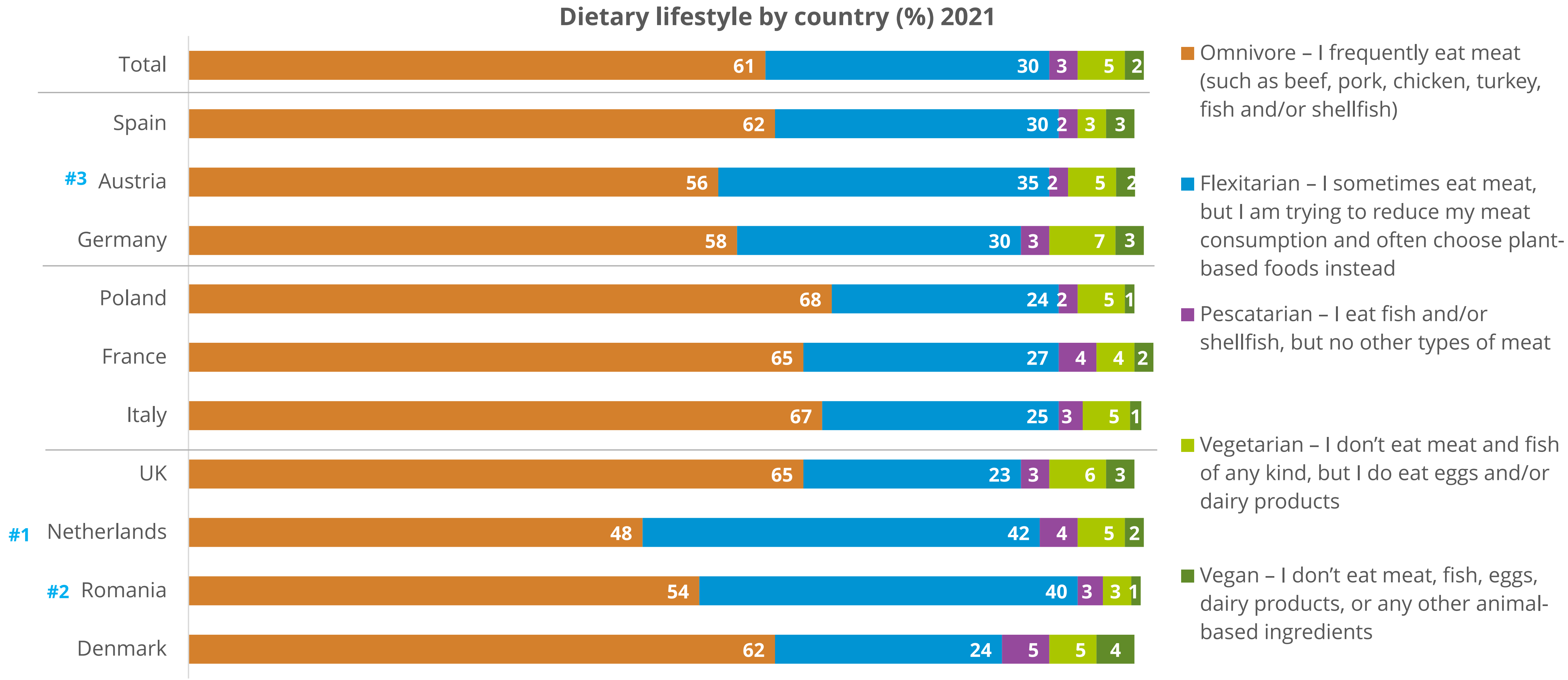
Total: n= 6676 | Austria n=639 | Denmark n=649 | France n=682 | Germany n=639 | Italy n=688 | Netherlands n=663 | Poland n=675 | Romania n=695 | Spain n=699 | UK n=650

smart protein

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

IV. European behaviours regarding plant-based food consumption

In 2021, **39% of Europeans were following a non-meat** based dietary lifestyle with NL, RO and AT leading the way.

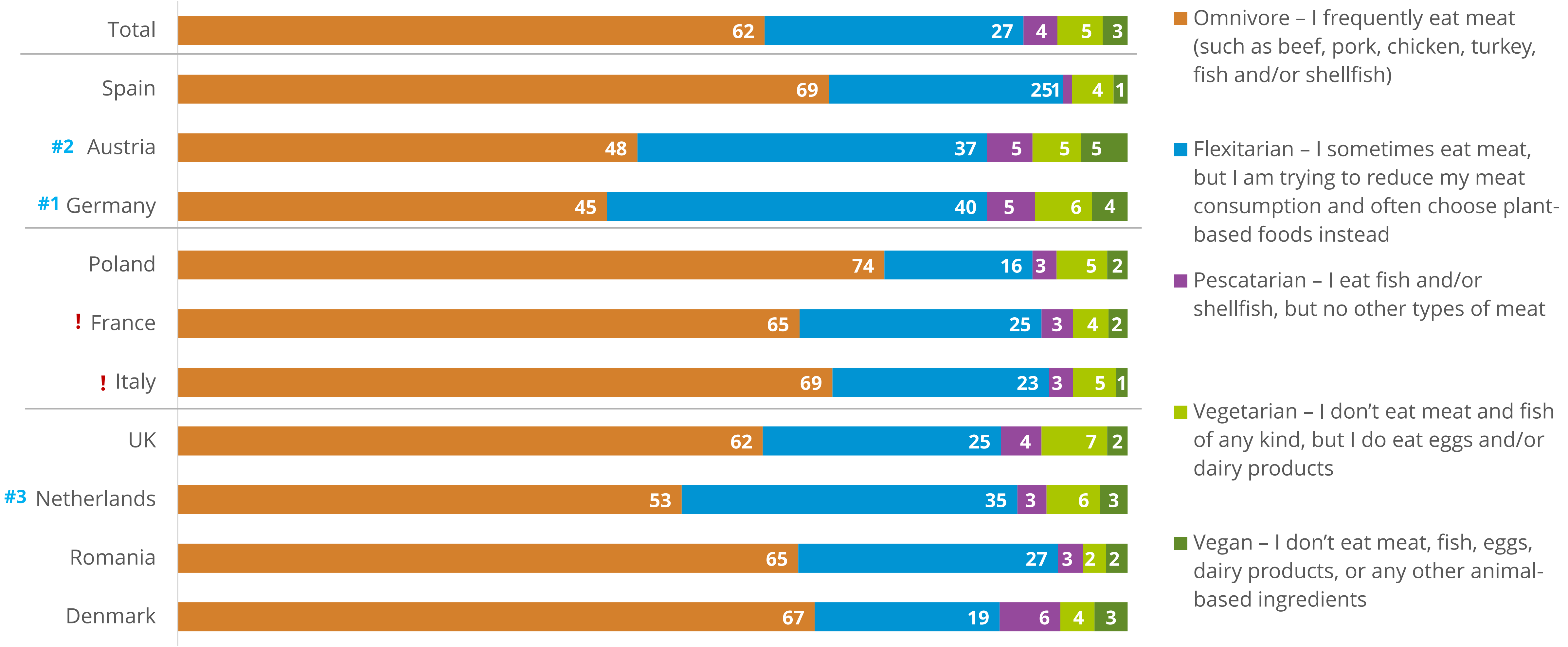


Q3: Which category best describes your current dietary lifestyle? | Single selection

Total: n= 7590 | Austria n=757 | Denmark n=773 | France n=750 | Germany n=757 | Italy n=759 | Netherlands n=750 | Poland n=757 | Romania n=754 | Spain n=774 | UK n=759

In 2023, **38% continue to follow a non-meat based dietary** lifestyle, now with DE, AT and NL leading the way.

Dietary lifestyle by country (%) 2023



Q3: Which category best describes your current dietary lifestyle? | Single selection

Total: n= 7500 | Austria n=750 | Denmark n=750 | France n=750 | Germany n=750 | Italy n=750 | Netherlands n=750 | Poland n=750 | Romania n=750 | Spain n=750 | UK n=750

Interest in *flexitarianism* transcends generations and genders.

Dietary lifestyle by age and gender (%)

	Boomers (1946- 1964)	Gen X (1965-1980)	Millennials (1981-1996)	Gen Z (1997-2012)	Female	Male	Diverse**
Flexitarians	29%	27%	28%	26%	31%	23%	43%
Omnivores	64%	64%	61%	58%	58%	66%	26%
Pescatarian	3%	3%	3%	5%	3%	4%	4%
Vegetarian	1%	2%	3%	4%	2%	3%	13%
Vegan	3%	4%	5%	7%	6%	3%	13%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

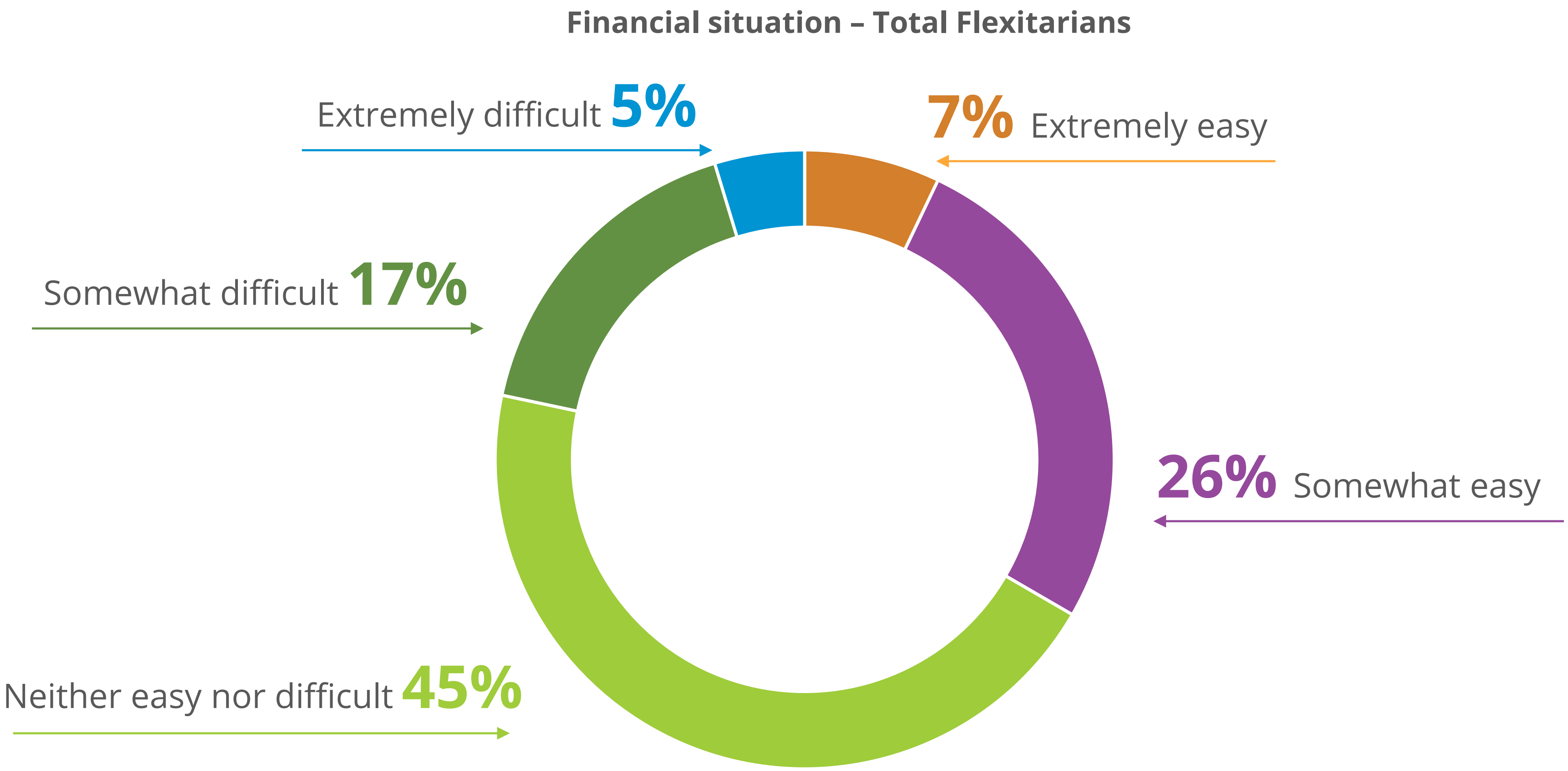
Market plant-based foods that appeal to the needs of everyone.

***Sample size below 30 and it is showed only for reference*

Q3: Which category best describes your current dietary lifestyle? | Single selection

Total: n= 2044

45% of European flexitarians have **neither an easy nor difficult financial situation.**

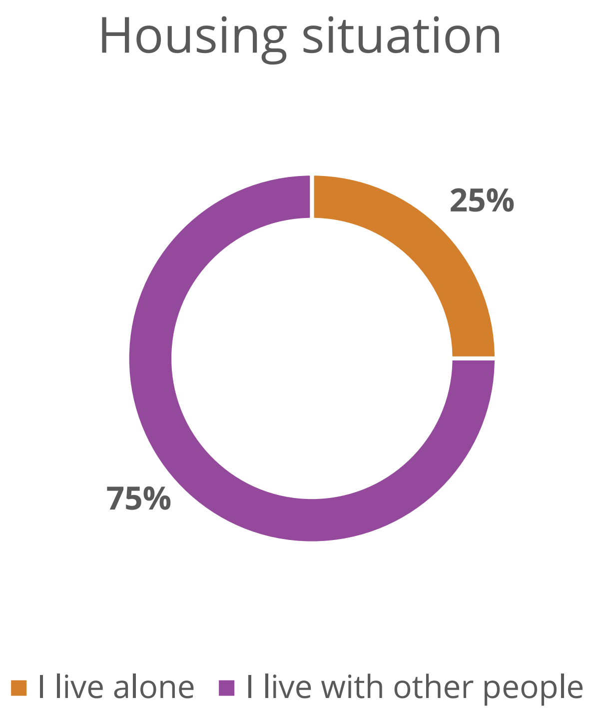


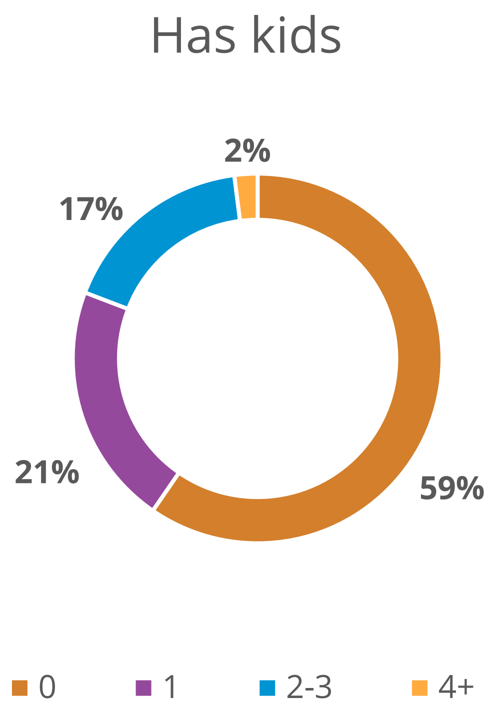
Q40 How would you describe your own financial situation?

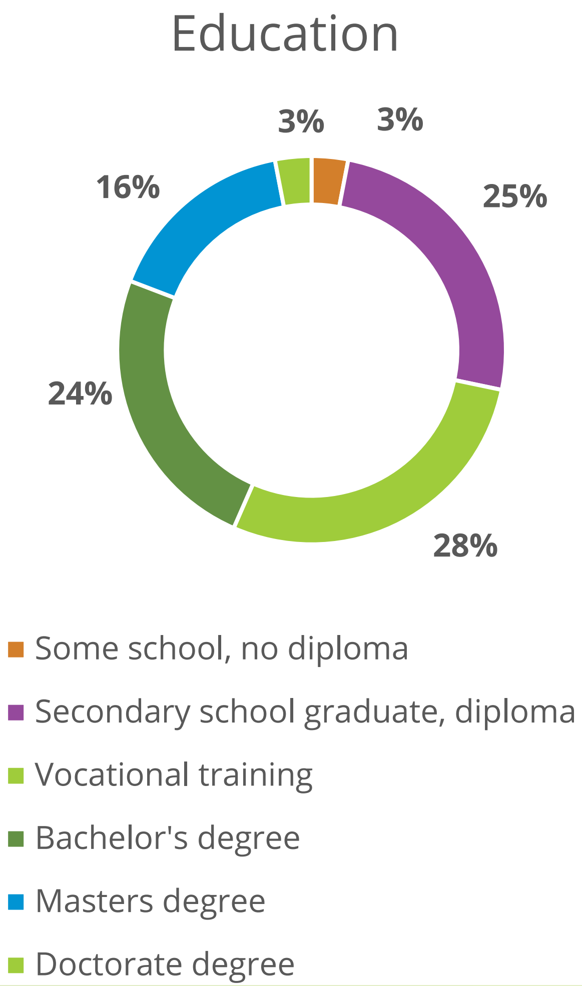
Total: n= 2044

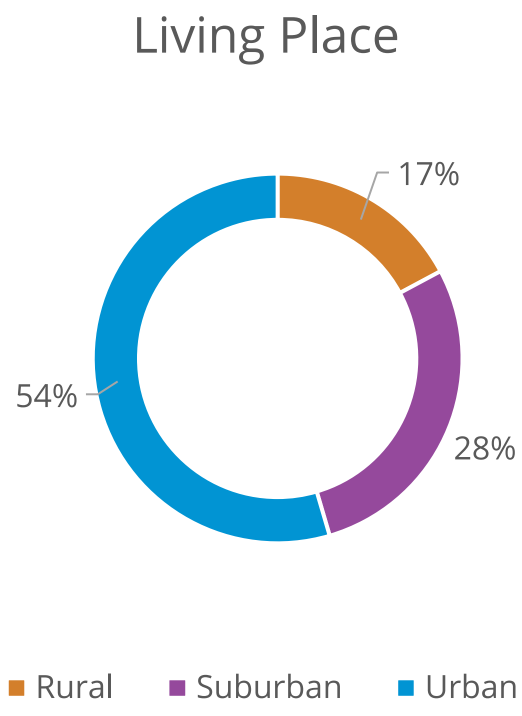
In addition, **they are usually living with other people, but not kids, in the city,** and have at least a vocational training.

Socioeconomic situation – Total Flexitarians

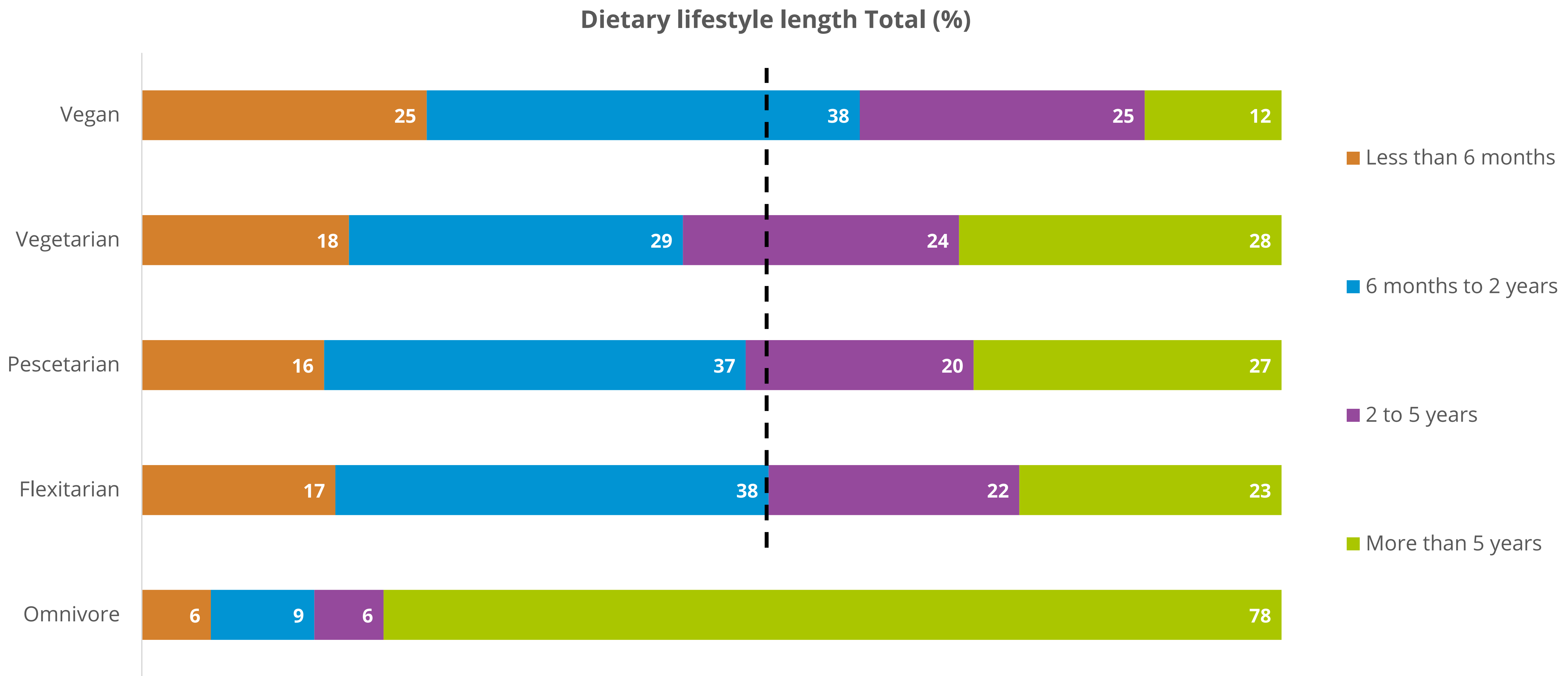








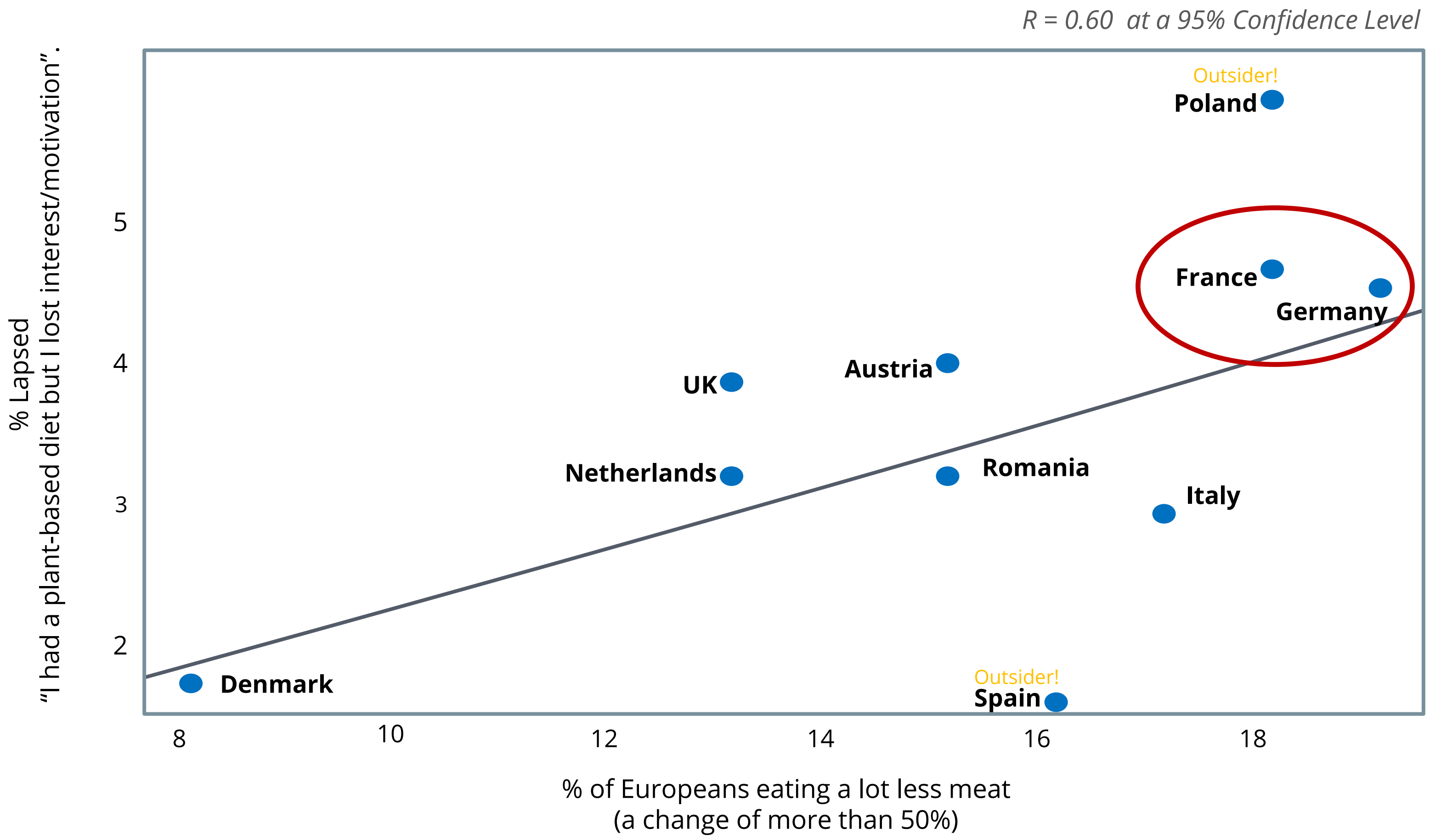
On average, 45% of European consumers have been **flexitarian+** for more than two years.



Q4: How long have you been following your current dietary lifestyle?| Single choice

Total= 7500 | Flexitarians n=2044 | Omnivores n=4635 | Pescatarian n= 267 | Vegan n=197 | Vegetarian n=357

However, if Europeans change too much, they might experience a higher likelihood to end their plant-based dietary lifestyle.



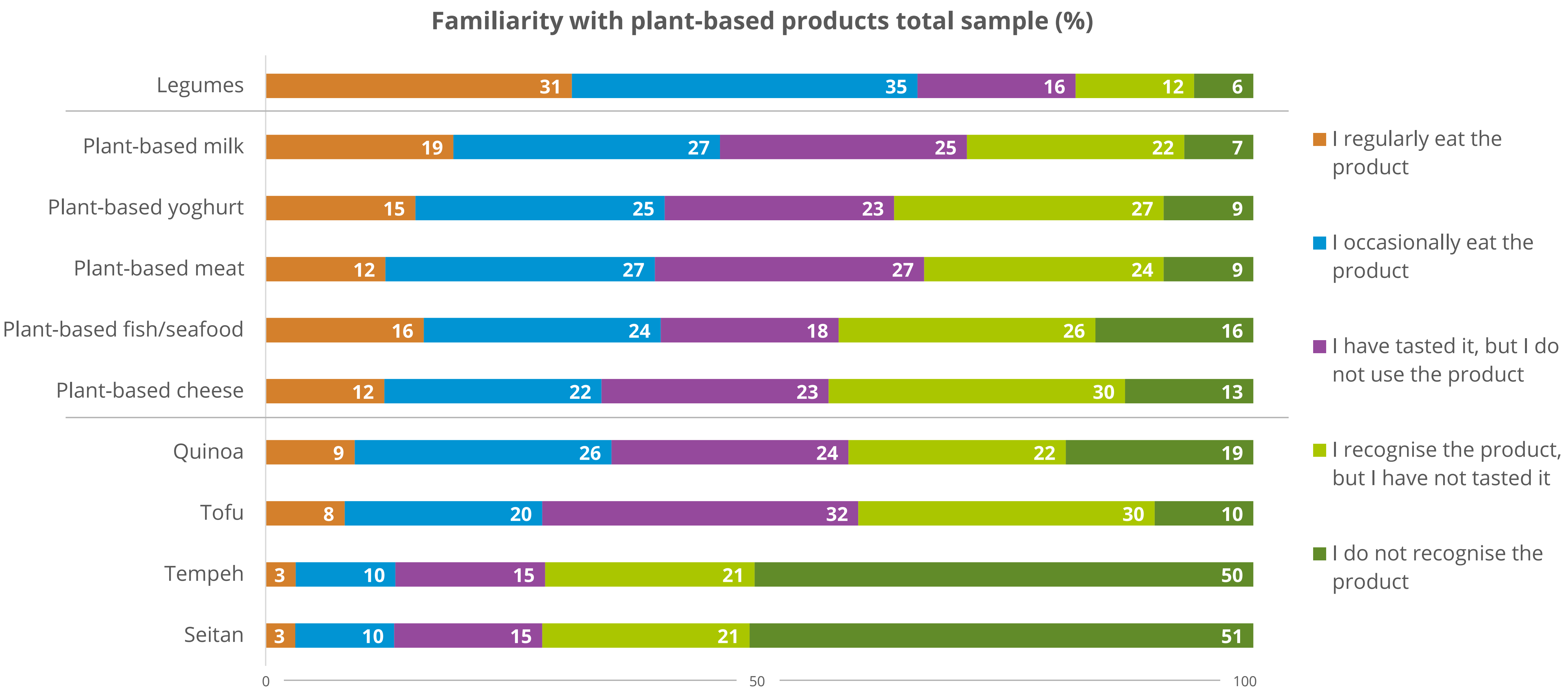
A gradual change is key to secure long-term plant-based adoption!

Please note that the presented correlation analyses in this study aim to identify potential relationships between variables. While significant correlations may suggest associations, they do not necessarily imply causation. Additional factors and complexities that influence the observed patterns might need further analysis.

Q4: How long have you been following your current dietary lifestyle?| Single choice | Q5: Which of the following phrases best describes your current dietary habits or situation? | Single choice | Q8: Compared to a year ago, how much meat (e.g. beef, pork, chicken) are you eating now? | Single choice

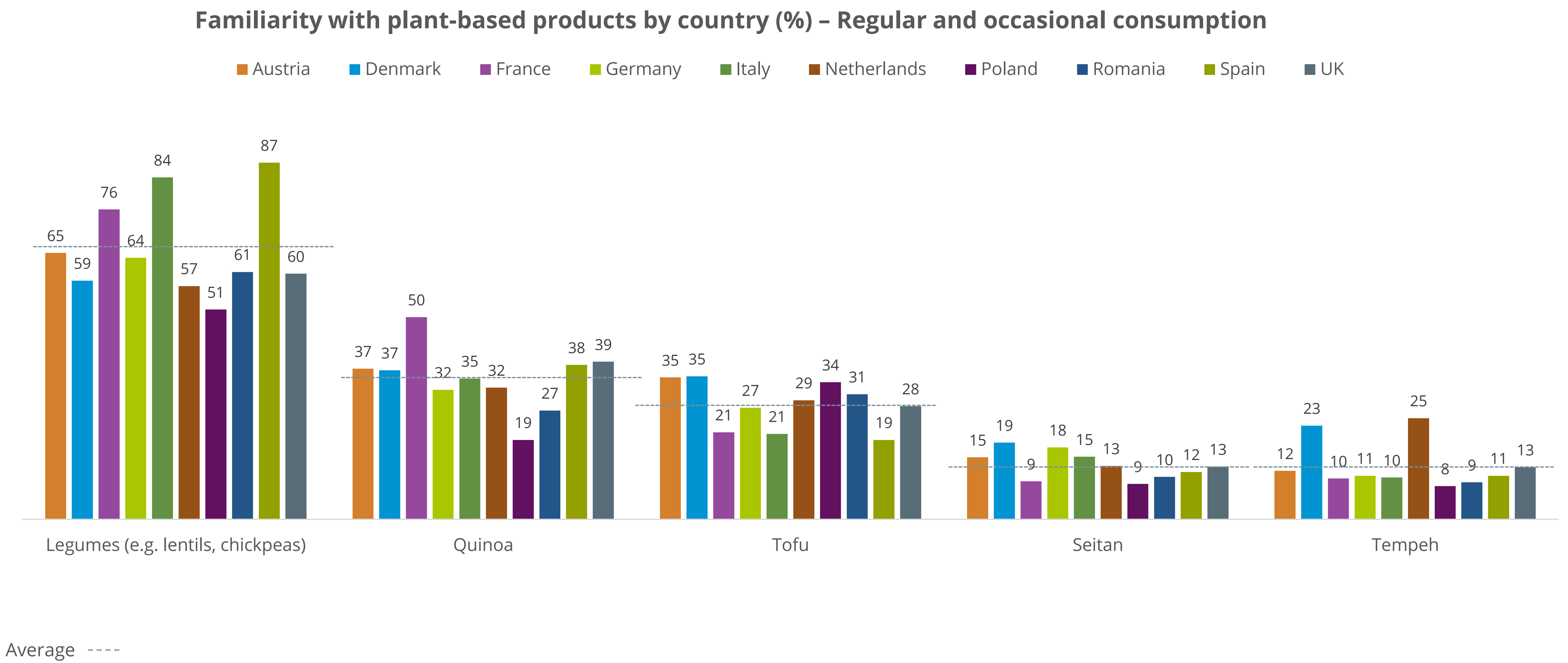
Total: n= 7500 | Austria n=750 | Denmark n=750 | France n=750 | Germany n=750 | Italy n=750 | Netherlands n=750 | Poland n=750 | Romania n=750 | Spain n=750 | UK n=750

Legumes are eaten the most often, followed by plant-based dairy. Seitan and tempeh are the least familiar foods.



Q6: How familiar are you with the following food products?| Single choice

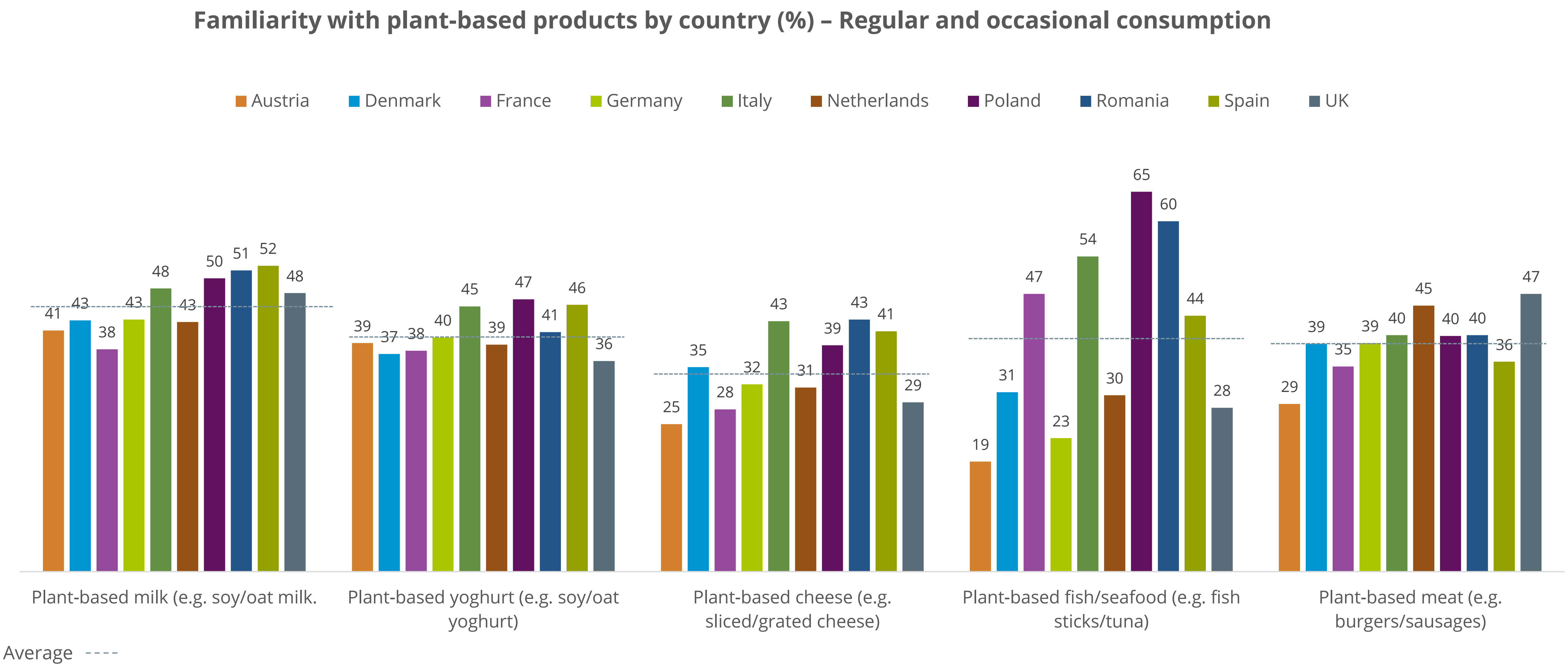
Consumers in SP and IT lead in legume consumption, while DK and NL in adopting less mainstream foods.



Q6: How familiar are you with the following food products?| Single choice

Total: n= 7500 | Austria n=750 | Denmark n=750 | France n=750 | Germany n=750 | Italy n=750 | Netherlands n=750 | Poland n=750 | Romania n=750 | Spain n=750 | UK n=750

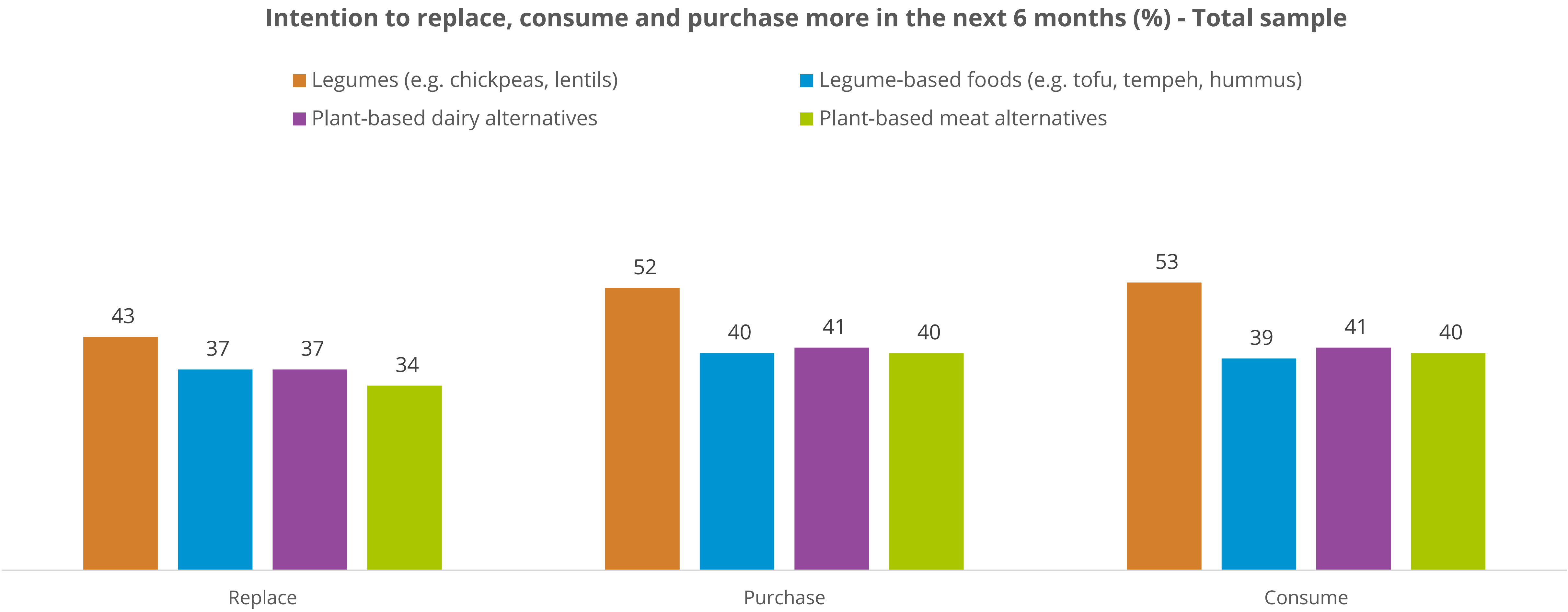
PL, RO, SP and IT demonstrate the highest acceptance of various plant-based alternatives.



Q6: How familiar are you with the following food products?| Single choice

Total: n= 7500 | Austria n=750 | Denmark n=750 | France n=750 | Germany n=750 | Italy n=750 | Netherlands n=750 | Poland n=750 | Romania n=750 | Spain n=750 | UK n=750

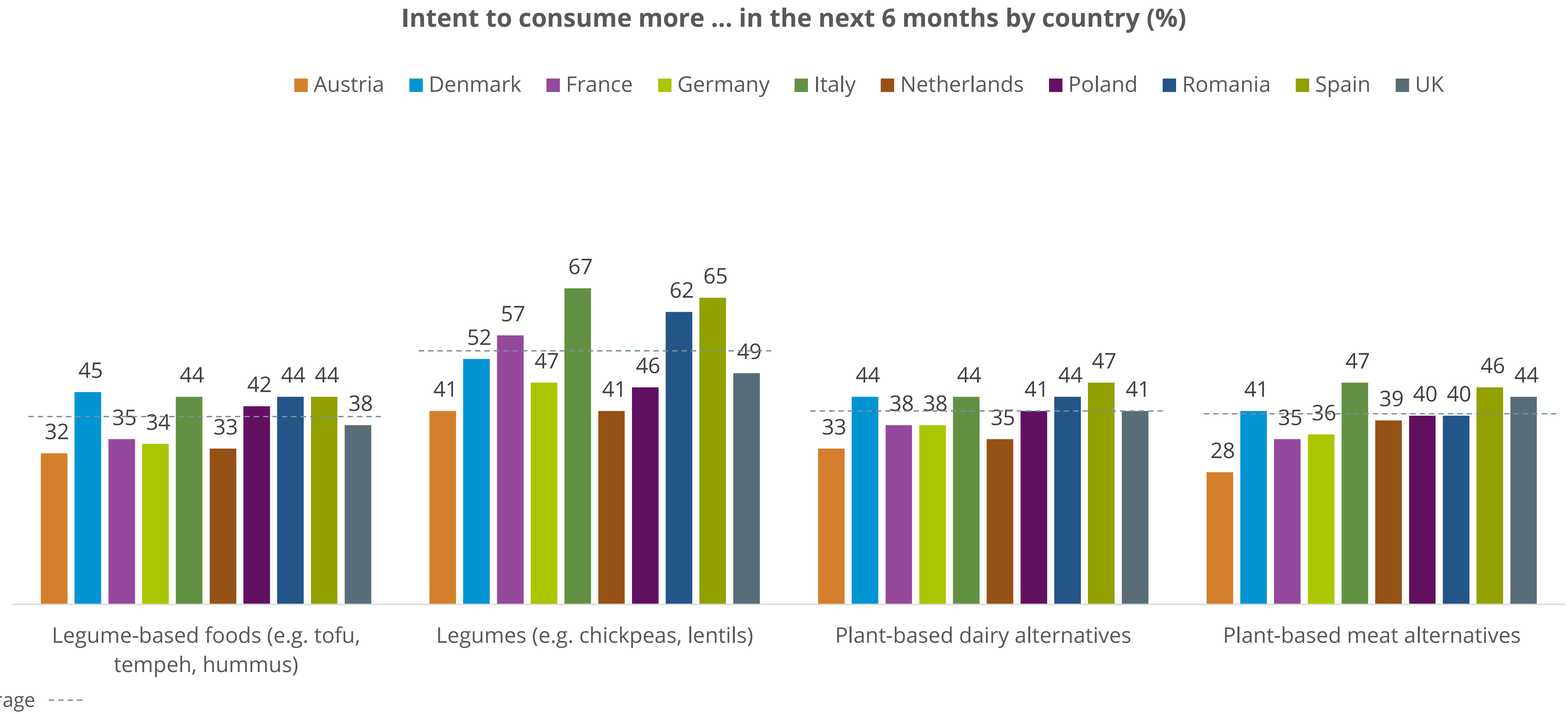
Looking into the future, **European consumers want more.**



Q11: Please indicate your agreement to the following statements. I intent to replace animal-based foods in my diet by eating more… in the next 6 months | Single choice | Sum of ‘Strongly agree’ + ‘Agree’ + ‘Somewhat agree’

Total: n= 7500

IT and SP show the highest drive to consume more plant-based foods, in particular legumes.

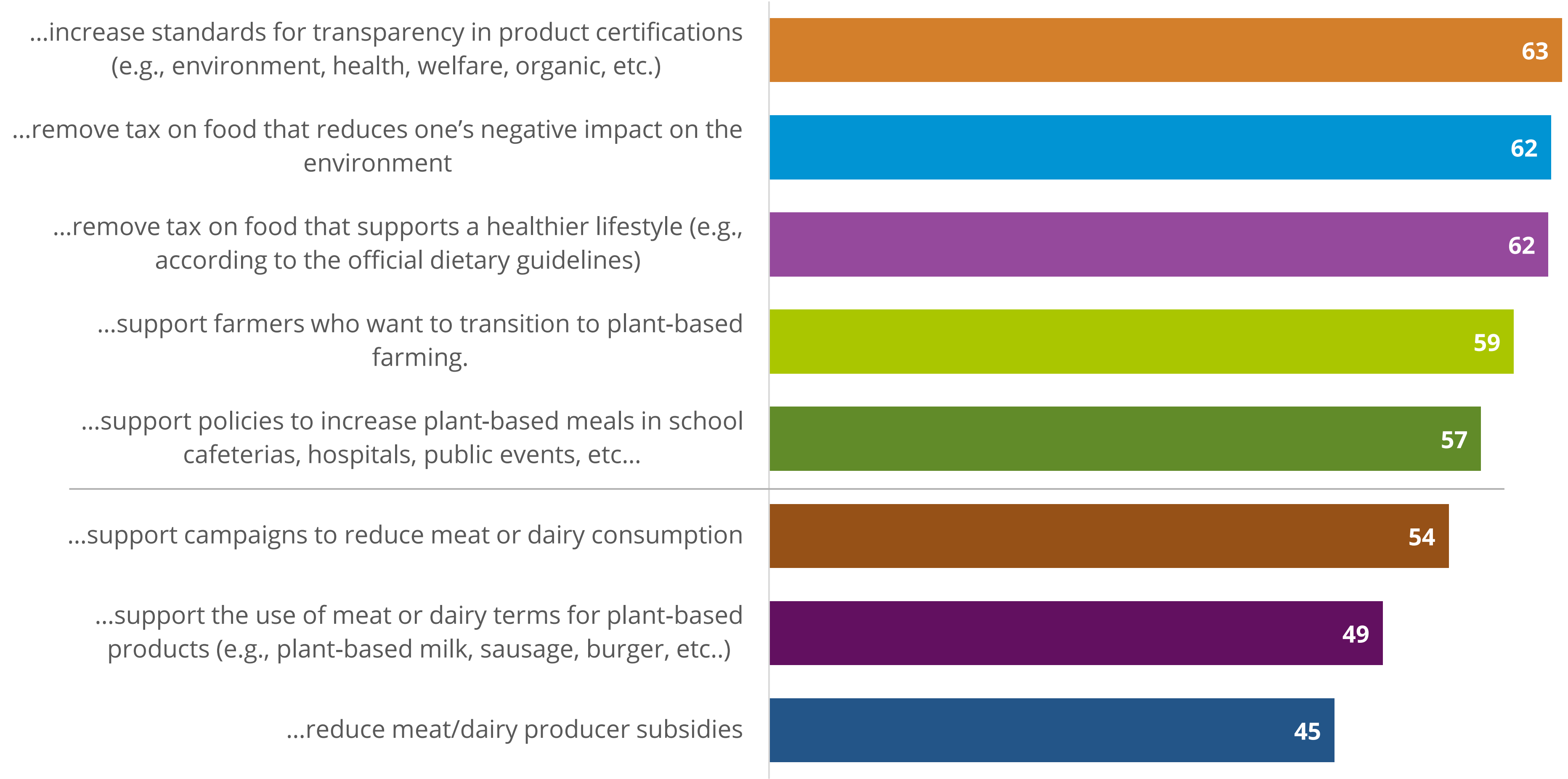


Q12: Please indicate your agreement to the following statements. I intend to consume more … in the next 6 months. | Single choice

Total n= 7500 | Austria n=750 | Denmark n=750 | France n=750 | Germany n=750 | Italy n=750 | Netherlands n=750 | Poland n=750 | Romania n=750 | Spain n=750 | UK n=750

However, **many Europeans seek greater government support** to facilitate their transition to plant-based diets.

Total agreement regarding actions required from policymakers total sample (%)



Countries where plant-based lifestyles are less prevalent, (e.g., Spain, Italy), depend more on government support to adopt change.

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)

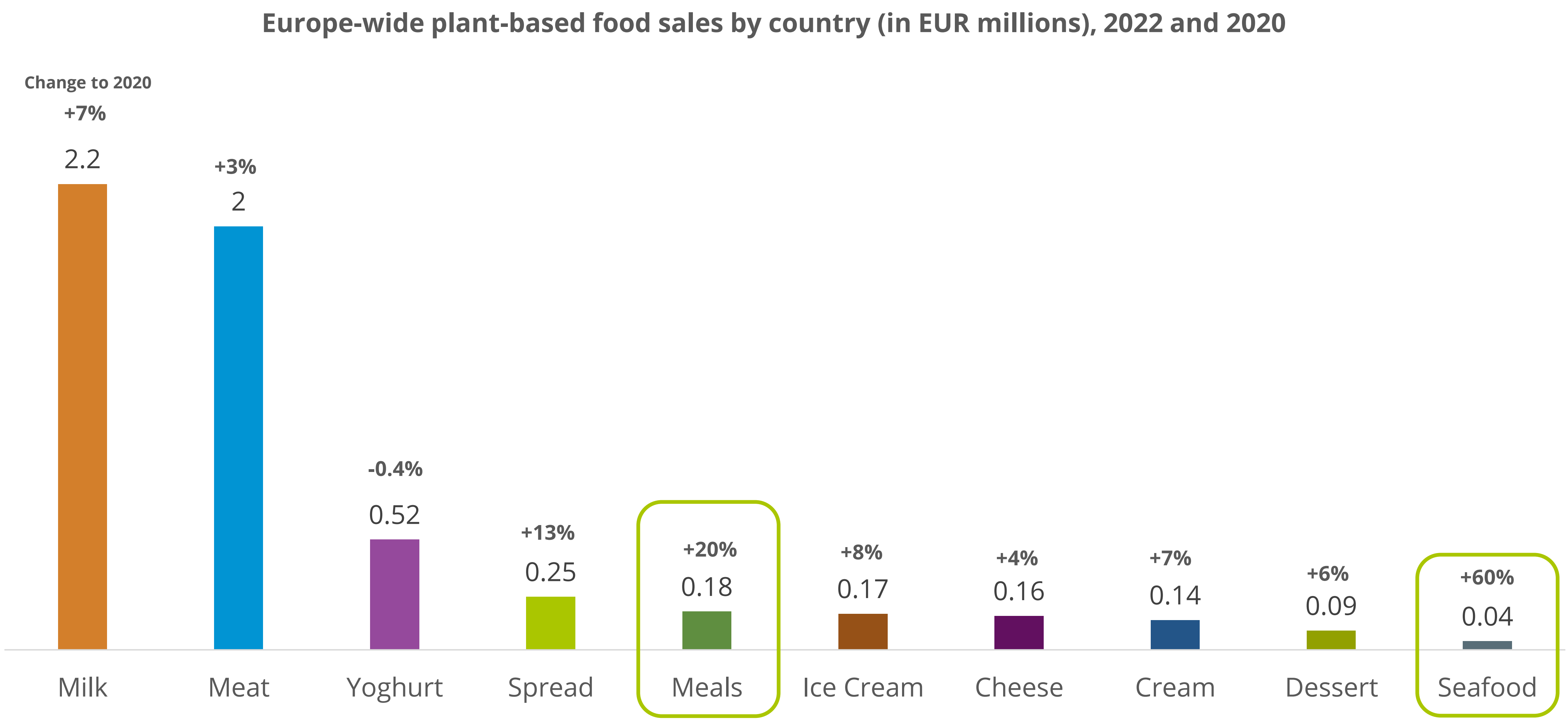
Total n= 7500

smart protein

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

V. European behaviours regarding plant-based alternatives

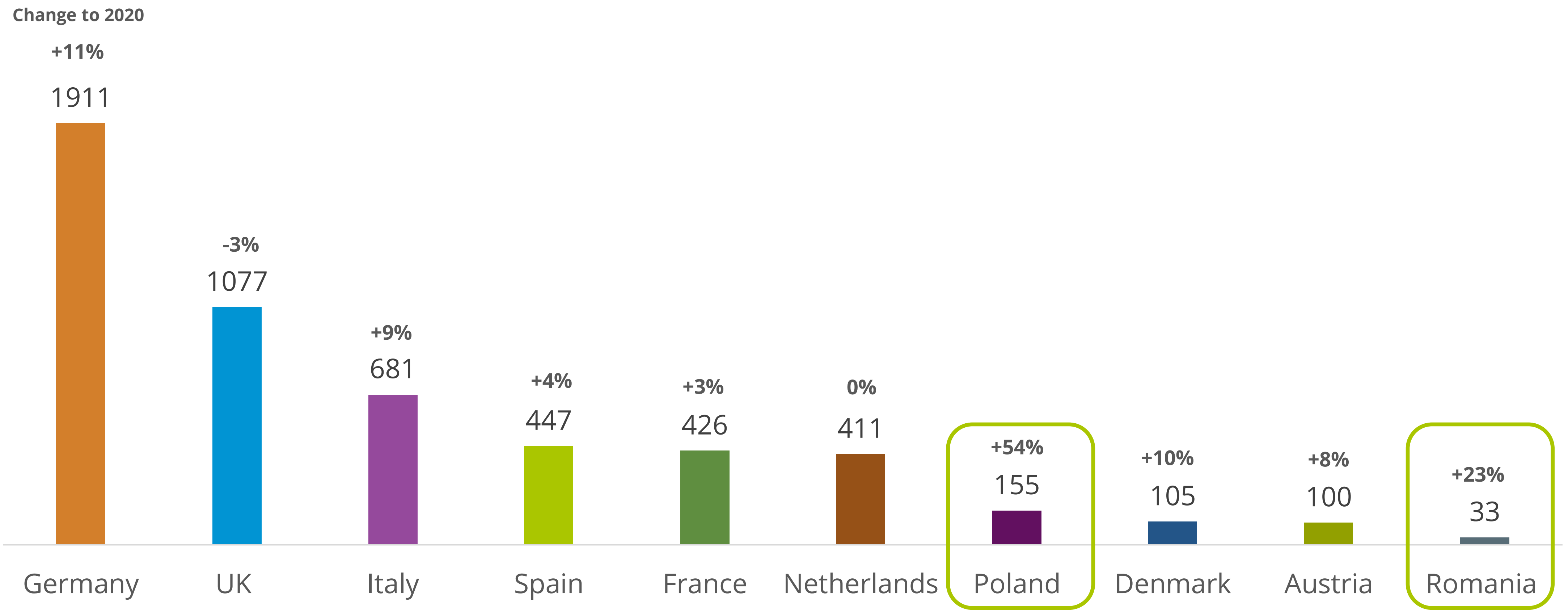
Plant-based milk is the most developed category. Plant-based meals shows the highest annual growth.



Source: GFI EUROPE / Europe: Plant-Based Foods Retail Market Report (2020-2022)

Sales of plant-based foods in Europe have grown 6% in 2022 – and 21% since 2020 – to reach €5.8 billion.

Europe-wide plant-based food sales by country (in EUR millions), 2022 and 2020



Source: GFI EUROPE / Europe: Plant-Based Foods Retail Market Report (2020-2022)

Taste, health and price are the most important factors to consumers when choosing plant-based alternatives.

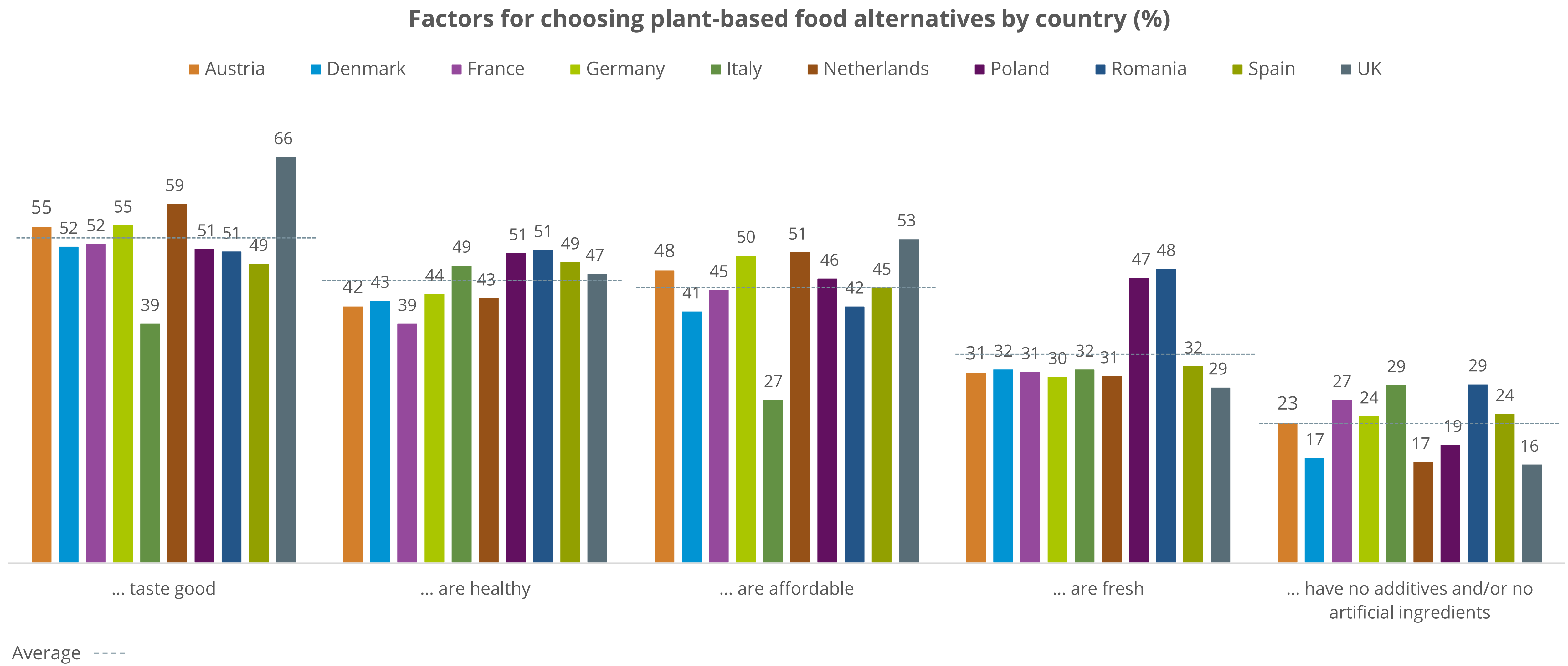
Factors for choosing plant-based food alternatives total sample (%)

Top 5 factors when choosing a plant-based alternative 2021	Top 5 factors when choosing a plant-based alternative 2023
#1 Tasty	#1Tasty
#2 Healthy	#2 Healthy
#3 Fresh	#3 Affordable caution!
#4 Has no additives/artificial ingredients	#4 Fresh
#5 Affordable	#5 Has no additives/artificial ingredients

Q14: 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)

Total: n= 7500

For UK consumers, taste and affordability are more important. For consumers in PL And RO, freshness is key.



Q14: 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)

Poll: Main barriers towards eating plant-based food

What is the main barrier **you** encounter when purchasing plant-based food products?

High prices remain as main barrier for plant-based alternatives. Lack of taste became more of an issue.

Drivers of plant-based food alternatives total sample (%)

Top 5 barriers when choosing plant-based alternatives 2021
#1Too expensive
#2 not enough choice
#3 Lack of support: family/partner
#4 Not tasty enough
#5 Don't want to change habit/routines

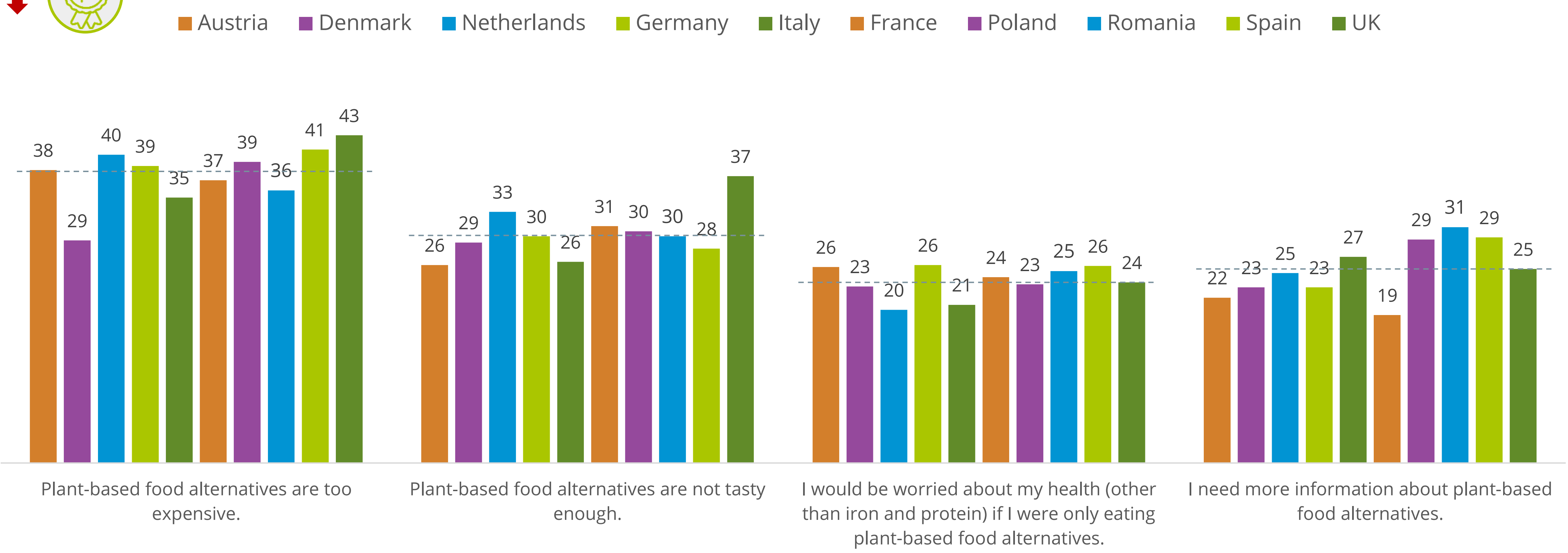
Top 5 barriers when choosing plant-based alternatives 2023
#1Too expensive
#2 Not tasty enough caution!
#3 Need more information
#4 Worried about health caution!
#5 Don't want to change habit/routines
#6 not enough choice
#7 Lack of support: family/partner

Q15: Which of the following do you encounter as barriers when choosing plant-based food alternatives?| Multiple choice (max 5)

Total: n= 7500

Experienced markets (AT,DE, NK, UK) struggled the most with plant-based alternatives being expensive and non-tasty.

Top 4 reasons NOT to choose plant-based alternatives (%) – Total Sample



Average ----

Q15: Which of the following do you encounter as barriers when choosing plant-based food alternatives?| Multiple choice (max 5)

Total: n= 2044 | Austria n=276 | Denmark n=146 | France n=191 | Germany n=300 | Italy n=171 | Netherlands n=265 | Poland n=117 | Romania n=205 | Spain n=185 | UK n=188

Supermarkets and discounters are the most common purchase locations for plant-based food alternatives.

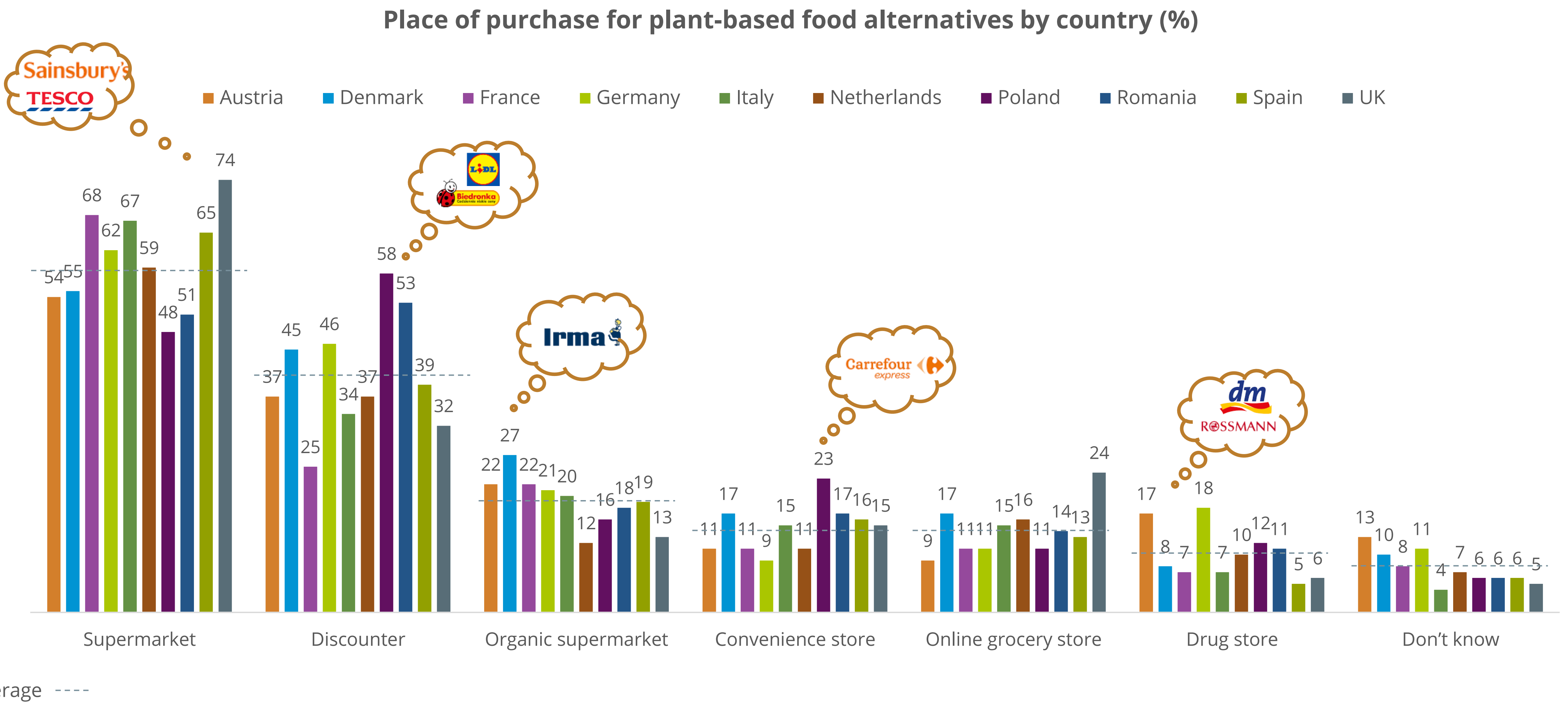
Place of purchase for plant-based food alternatives total sample (%)

Flexitarians+	Omnivores
62%	59%
41%	40%
25%	15%
21%	14%
15%	14%
18%	12%
16%	10%
12%	10%
14%	8%
3%	11%
1%	2%

Q16: Where are you likely to purchase plant-based food alternatives most frequently in the future? |Multiple choice

Total: n= 7500

Increasing availability at discounters can address affordability concerns around plant-based alternatives.

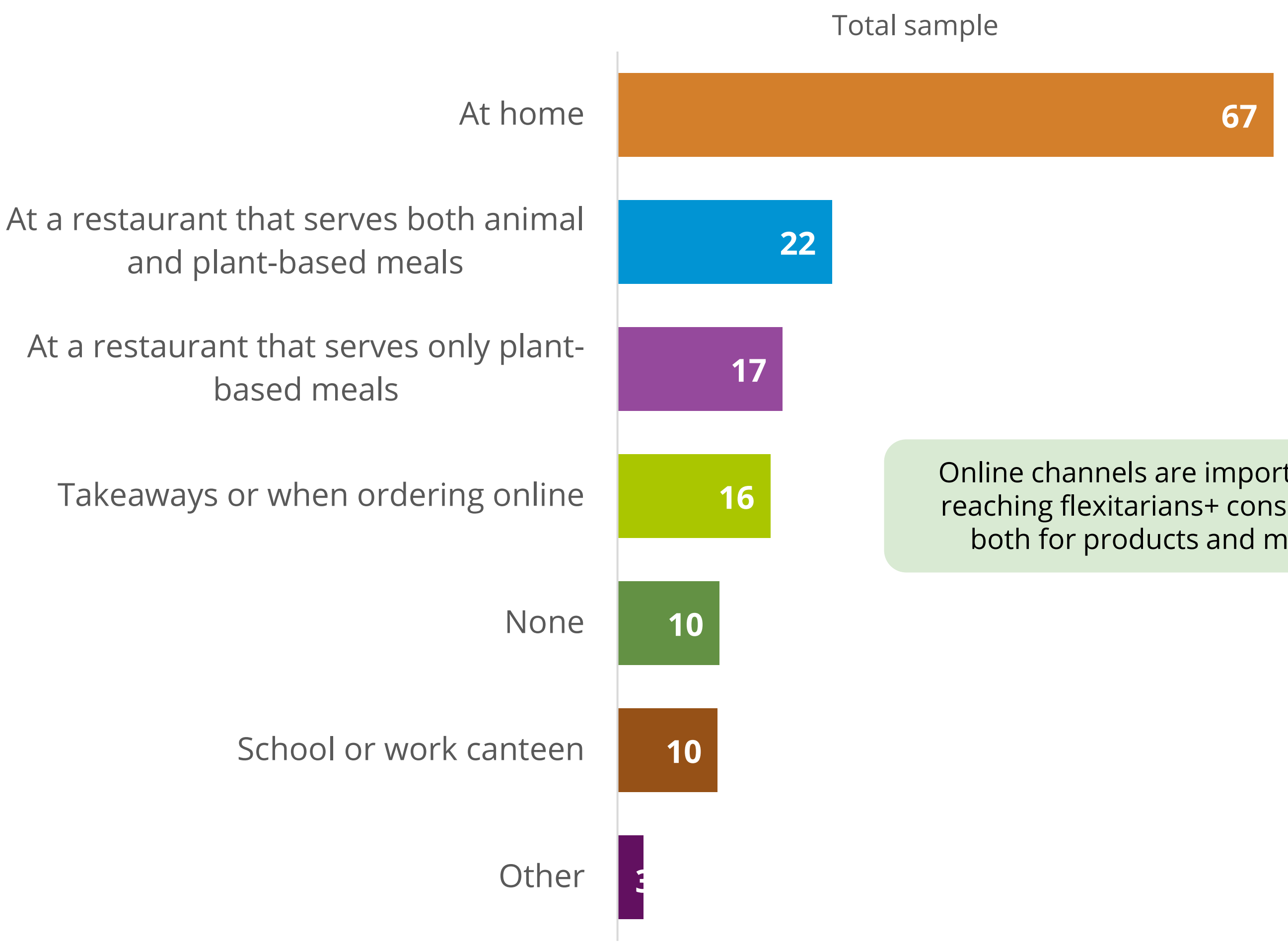


Q16: Where are you likely to purchase plant-based food alternatives most frequently in the future? |Multiple choice

Total: n= 7500 | Austria n=750 | Denmark n=750 | France n=750 | Germany n=750 | Italy n=750 | Netherlands n=750 | Poland n=750 | Romania n=750 | Spain n=750 | UK n=750

Consumers are most likely to eat plant-based alternatives **at home and in restaurants.**

Place of consumption of plant-based food alternatives total sample (%)



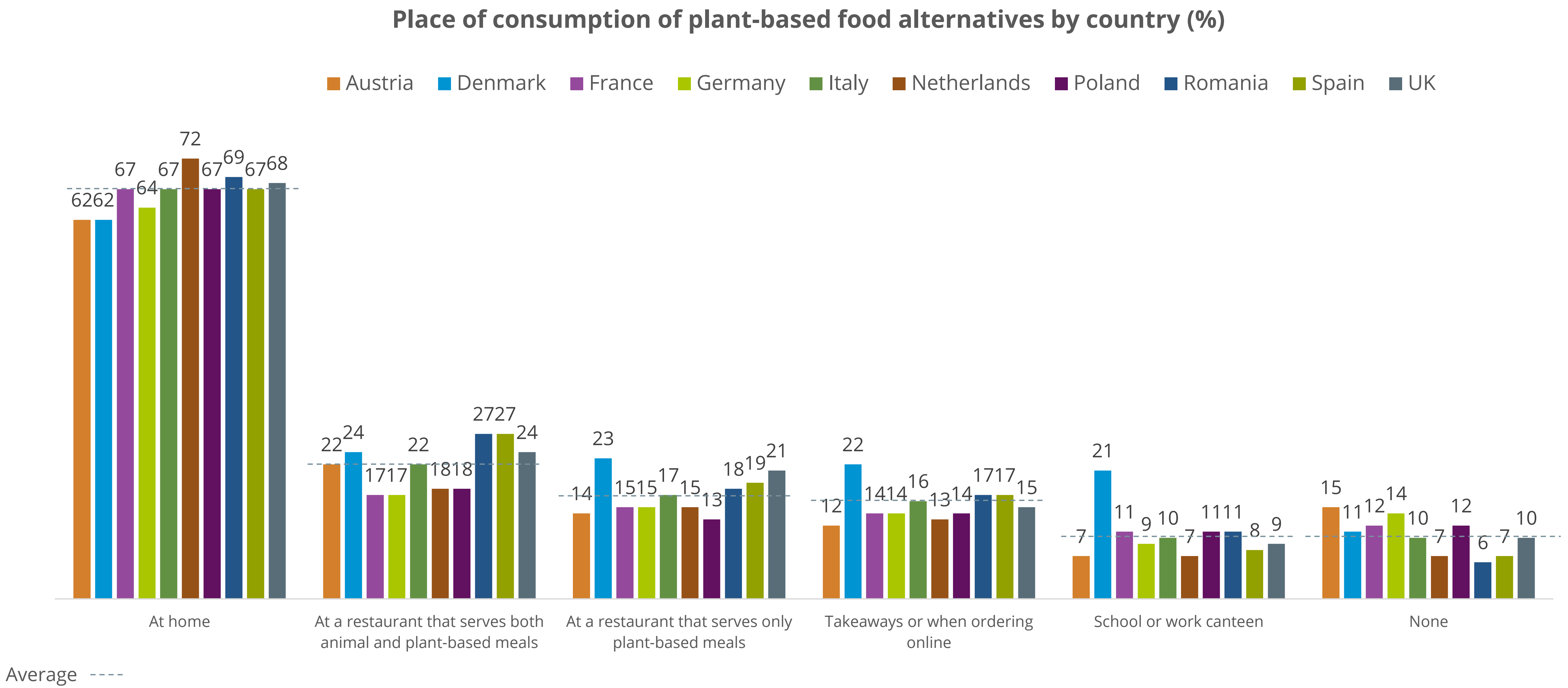
Online channels are important for reaching flexitarians+ consumers, both for products and meals!

Flexitarians+	Omnivores
73%	63%
24%	20%
21%	14%
19%	13%
3%	15%
12%	9%
3%	2%

Q17: Where are you likely to consume plant-based food alternatives most frequently in the future? | Multiple choice

Total n= 7500

There is a big opportunity to expand the access of plant-based meals at points of consumption…

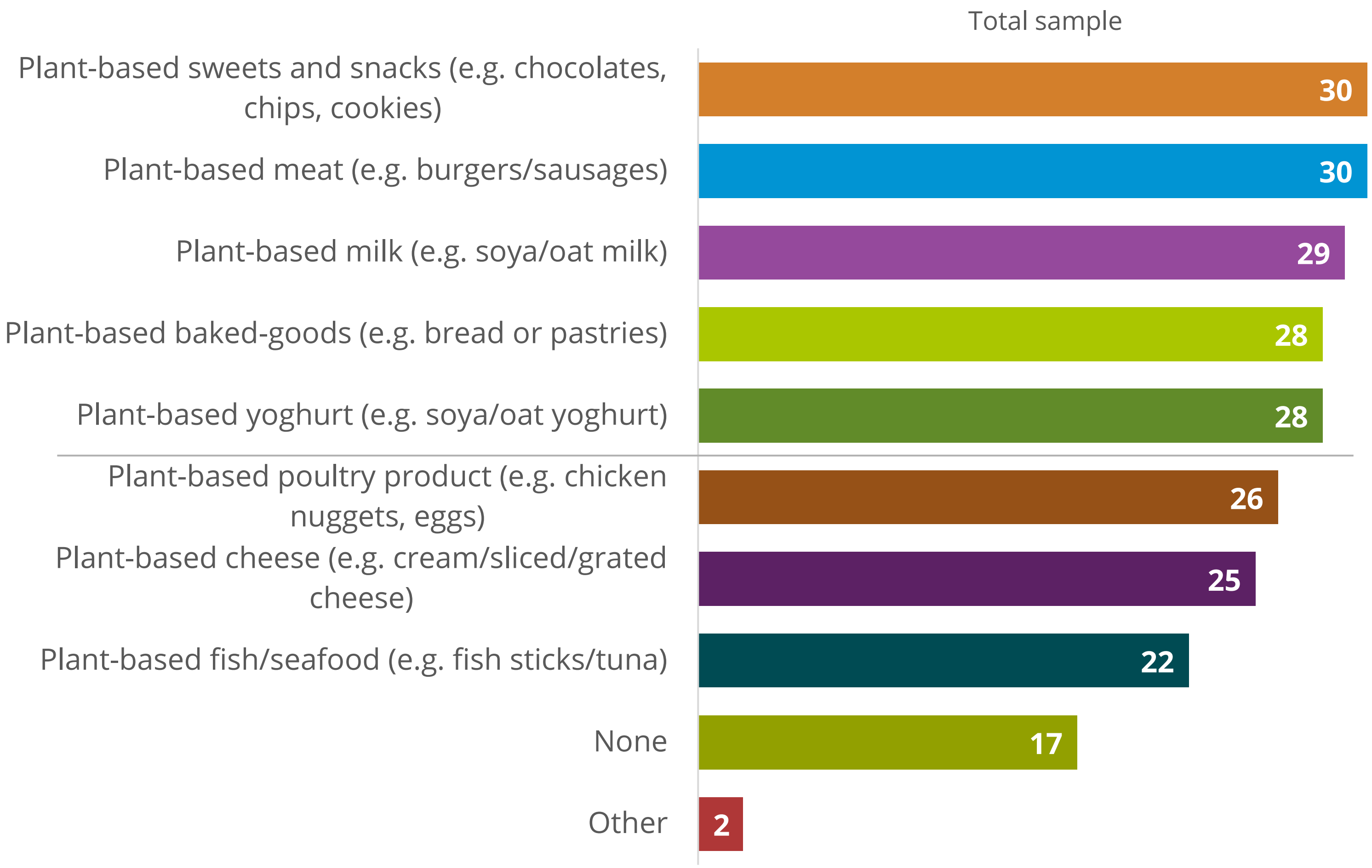


Q17: In which of the following locations do you normally consume plant-based food alternatives? |Multiple choice

Total: n= 7500 | Austria n=750 | Denmark n=750 | France n=750 | Germany n=750 | Italy n=750 | Netherlands n=750 | Poland n=750 | Romania n=750 | Spain n=750 | UK n=750

…As in general, **Europeans want more.**

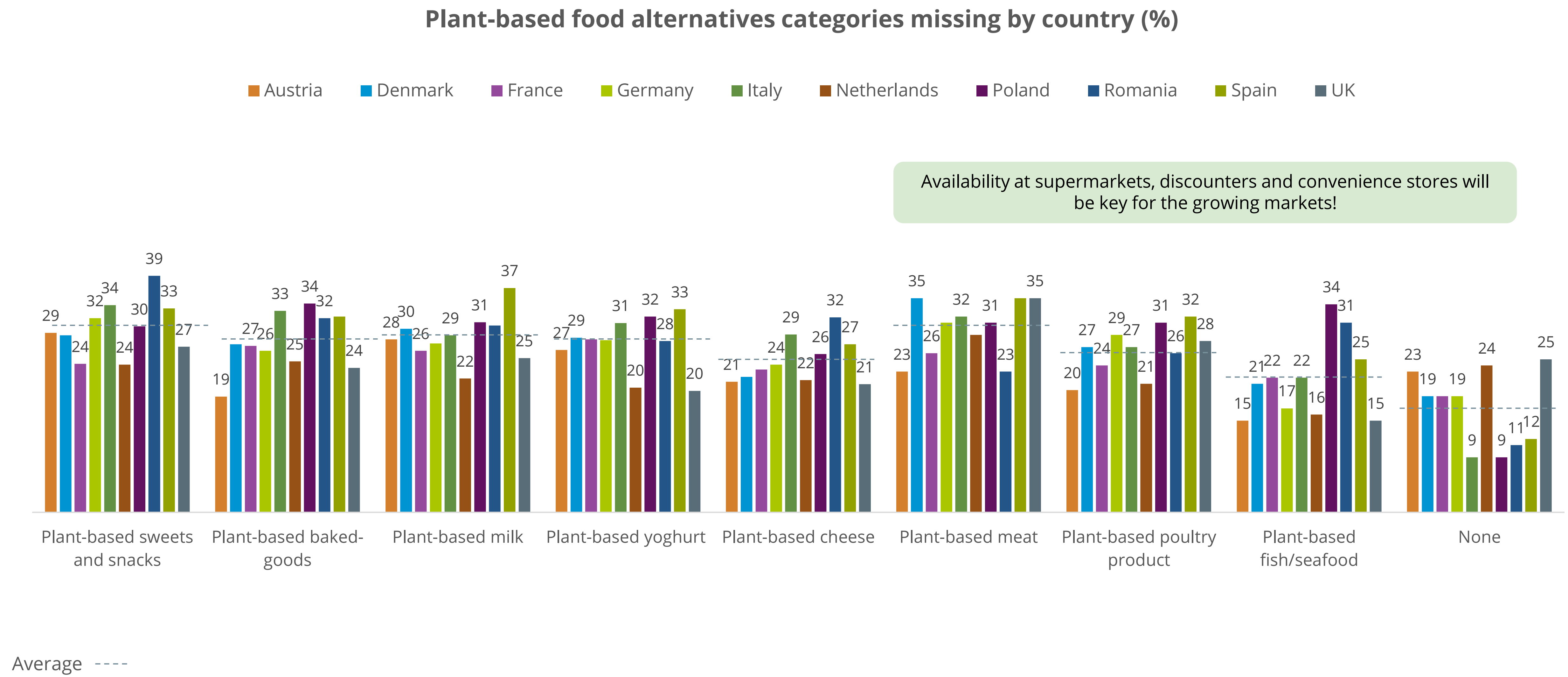
Plant-based food alternatives by missing categories total sample (%)



Flexitarians+	Omnivores
33%	24%
37%	26%
34%	25%
31%	26%
33%	24%
31%	24%
31%	21%
25%	20%
8%	23%
2%	2%

Q18: 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

Countries with the highest annual growth in sales (RO, SP, PL) of plant-based alternatives are even eager for more!



Q18: 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

Total: n= 7500 | Austria n=750 | Denmark n=750 | France n=750 | Germany n=750 | Italy n=750 | Netherlands n=750 | Poland n=750 | Romania n=750 | Spain n=750 | UK n=750

Improving social acceptance, affordability, and accessibility of plant-based alternatives is vital for growth.

Key associations driving the adoption of plant-based alternatives: The COM- B Approach (%) – Total Sample

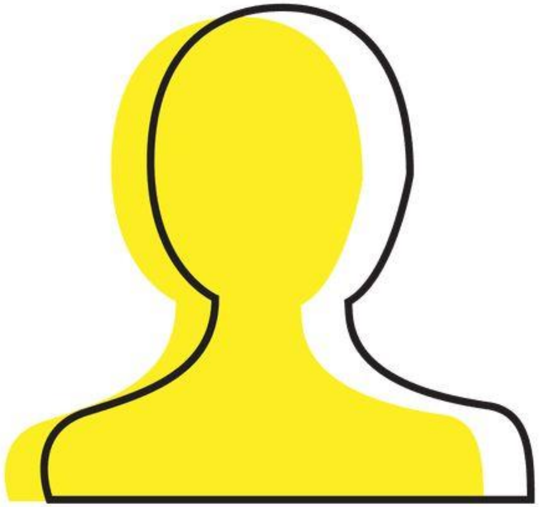
"(59%) Plant-based alternatives **are on sale** often enough"

"(55%) Eating plant-based alternatives **is good** for my health"

"(54%) I know the **benefits** of consuming plant-based alternatives"

"(54%) Eating plant-based alternatives will **reduce negative** effects on the environment"

"(48%) I find it **easy to locate** plant-based alternatives in (online) supermarkets and stores"



"(68%) Eating plant-based alternatives is **not part** of my culture"

"(68%) People who are important to me **don't think** I should eat plant-based food alternatives most of the time"

"(68%) Plant-based alternatives are **not easy** to obtain at discounted prices"

"(65%) Plant-based alternatives are **not affordable**"

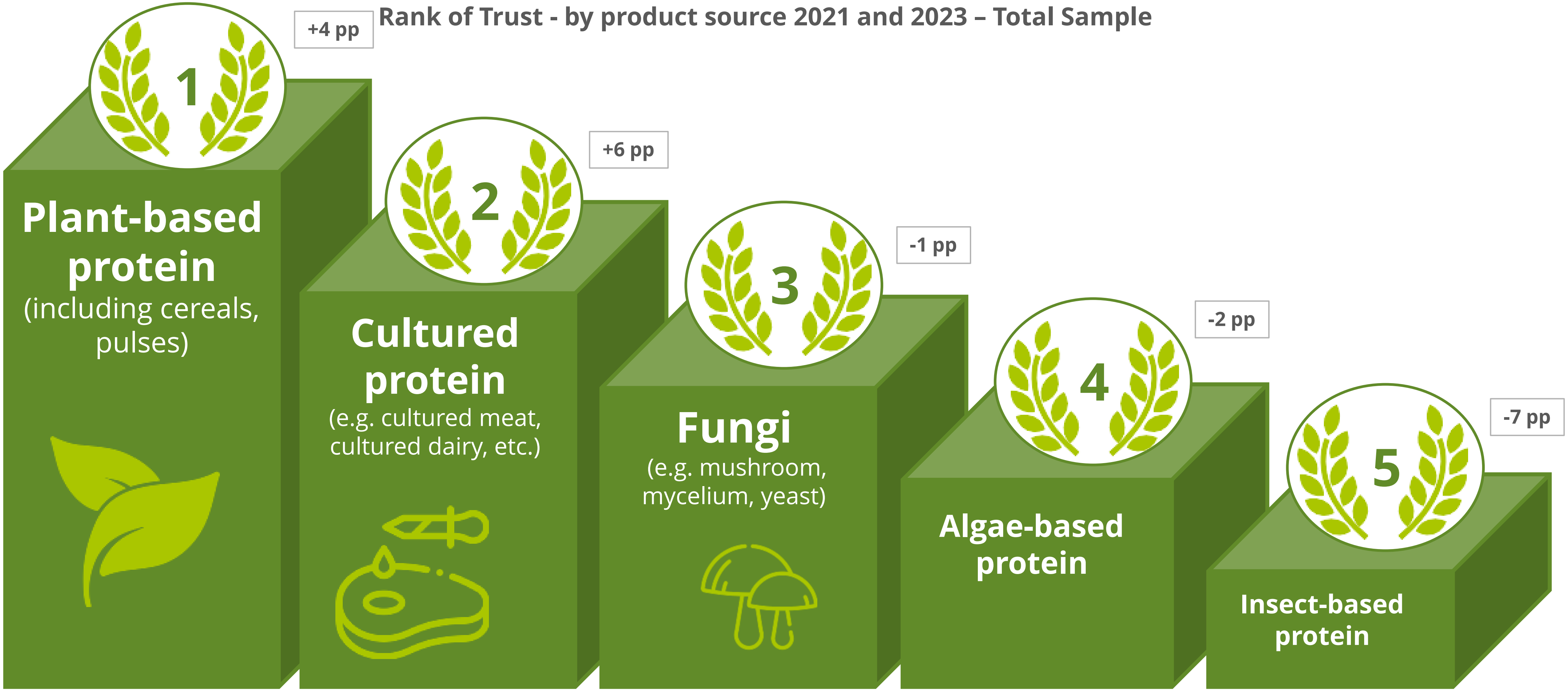
"(64%) I **don't find it easy to locate** plant-based food alternatives at takeaways and delivery restaurants"

Q26/Q27/Q28/Q29/Q30 "Please indicate your agreement to the following statements. |Single choice (7 point scale)

Total: n= 7500 | Austria n=750 | Denmark n=750 | France n=750 | Germany n=750 | Italy n=750 | Netherlands n=750 | Poland n=750 | Romania n=750 | Spain n=750 | UK n=750

European trust plant-based protein the most, followed by cultured protein and fungi-based protein.

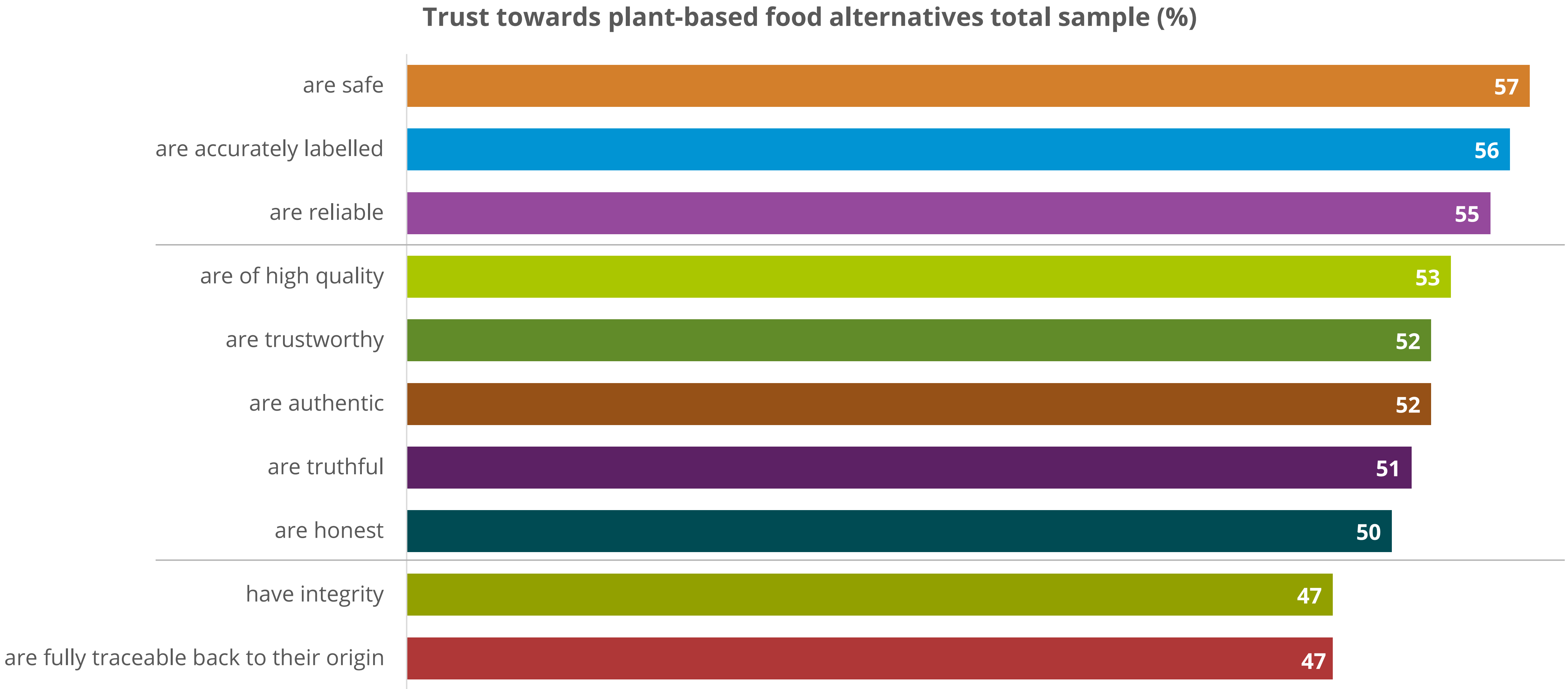
Rank of Trust - by product source 2021 and 2023 – Total Sample



Q21: 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

Total: n= 7500

Europeans trust plant-based alternatives mostly because they are safe, accurately labeled and reliable.



Q20: When thinking specifically about plant-based food alternatives, please indicate how much you disagree or agree with each of the following statements. I trust that plant-based food alternatives... |Single choice | Total agreement level (Strongly agree + Agree + Somewhat Agree)

Total n=7500

Plant-based protein, cultivated protein, and fungi protein sources are the most favored in Europe.

Rank of Trust - by product source 2023 – Total Sample

Popular sources

1

Plant-based protein

By location:
Italy
Netherlands

By demographic:
Flexitarians, vegetarians
Boomers, Gen X
Female

2

Cultured Protein

By location:
Denmark
Germany

By demographic:
Omnivores, vegans
Gen Z, Millennials
Male

3

Fungi

By location:
Austria
Poland, Romania, UK

By demographic:
Vegans, omnivores
Boomers, Gen X
Male

Niche sources

4

Algae-based protein

By location:
France
Romania

By demographic:
Pescatarians, vegans
Gen Z, Millennials
Male

5

Insect-based Protein

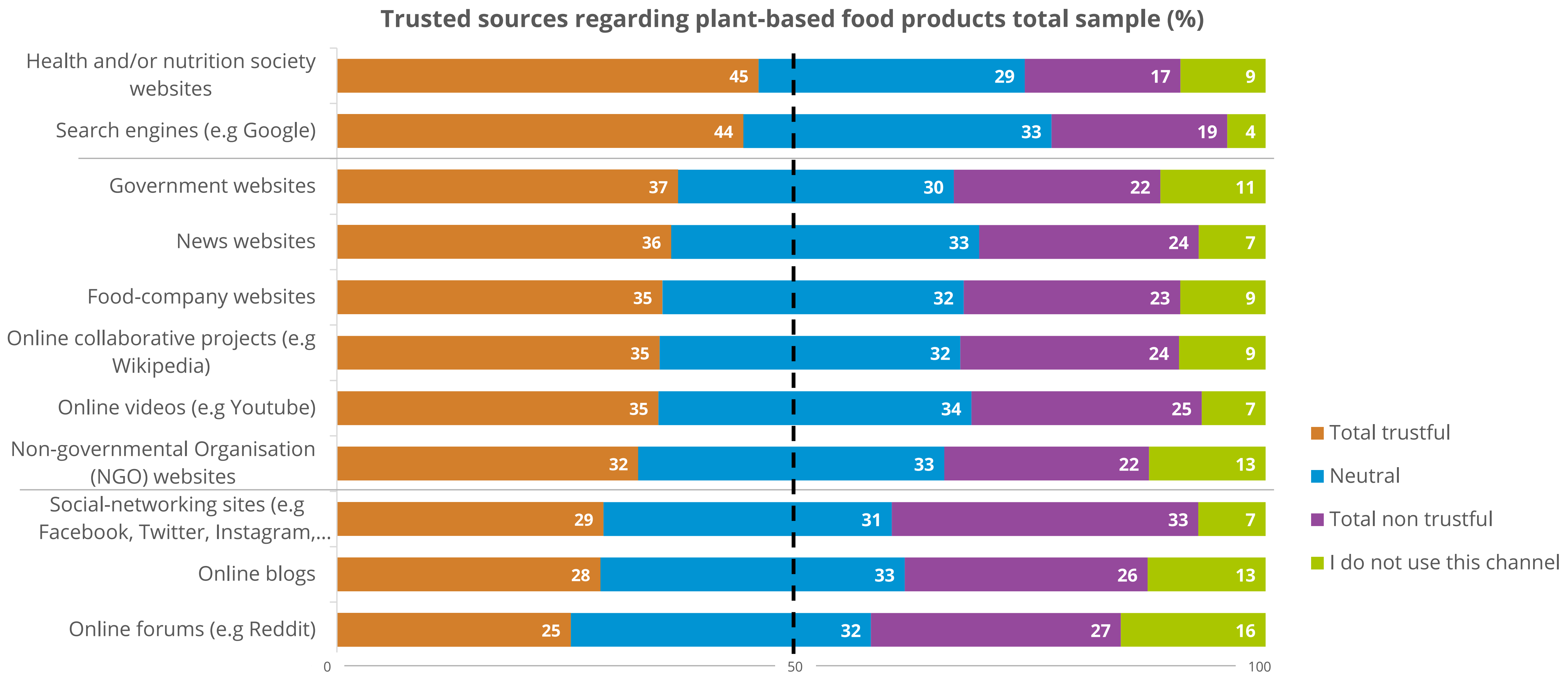
By location:
Netherlands
Austria, Germany

By demographic:
Pescatarians, vegans
Gen Z, Millennials
Male

Q21: 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

Total: n= 7500

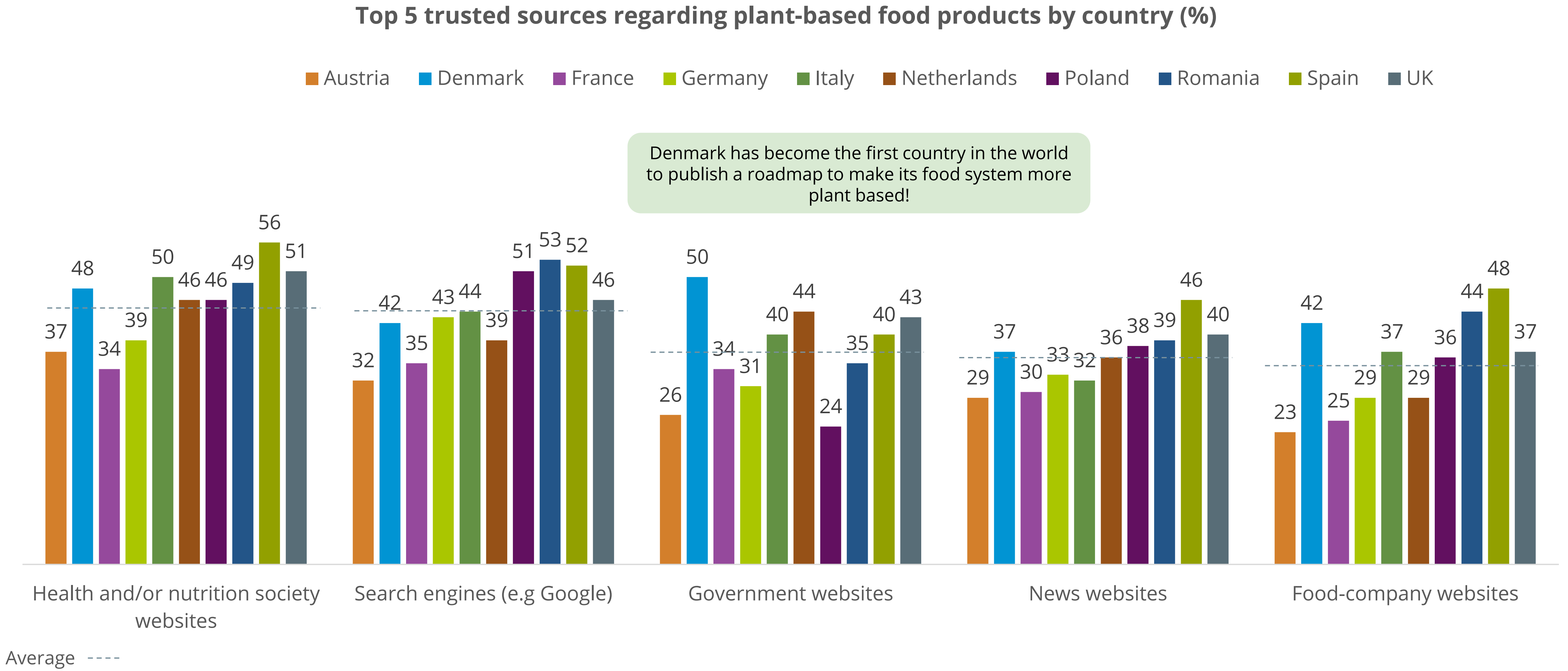
Health/nutrition websites, and search engines are trusted by consumers the most. SM content is the least trusted.



Q31: In general, how much do you trust information about plant-based food products from...| Single choice

Total: n= 7500

Consumers' trust in information about plant-based alternatives varies significantly across countries.

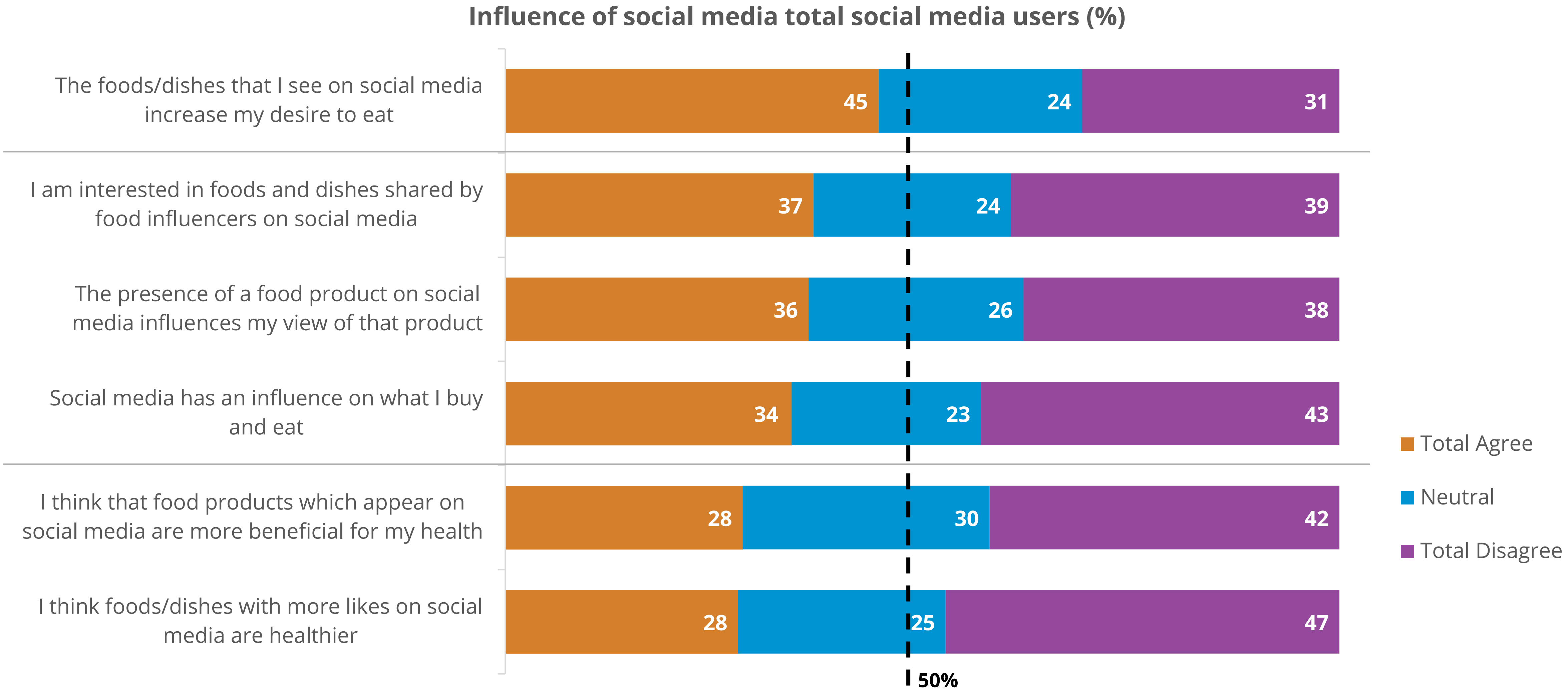


Denmark has become the first country in the world to publish a roadmap to make its food system more plant based!

Q31: In general, how much do you trust information about plant-based food products from...| Single choice | Total trust level (Very trustful + fairly trustful)

Total: n= 7500 | Austria n=750 | Denmark n=750 | France n=750 | Germany n=750 | Italy n=750 | Netherlands n=750 | Poland n=750 | Romania n=750 | Spain n=750 | UK n=750

Social media food posts somewhat boost appetite but not health associations.



Q35: Please indicate how much you disagree or agree with each of the following statements concerning social media and food attitudes.| Single choice

Total: n= 7500

How to keep increasing the acceptance of plant-based alternatives in Europe?

Before purchase

Be Repetitive: Educating consumers by addressing the why, what, and how of plant-based choices.

Be Social: Extending availability beyond PoS to other consumption locations.

Be Accessible: Addressing concerns around affordability, availability and enjoyable experiences.

During purchase

Be visible: Through a mix of integrated merchandising (fully or partially).

Be diverse: Providing a variety of protein sources and products to increase the likelihood of consumer purchase.

Be informative: Emphasizing transparency and traceability in labeling and communication.

After purchase

Be credible: Ensuring trustworthiness in both shared content and chosen media channels.

Be open for change: Investing in research and product development to meet the growing demand and expectations (taste).

smart protein

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

VI. Conclusions and recommendations

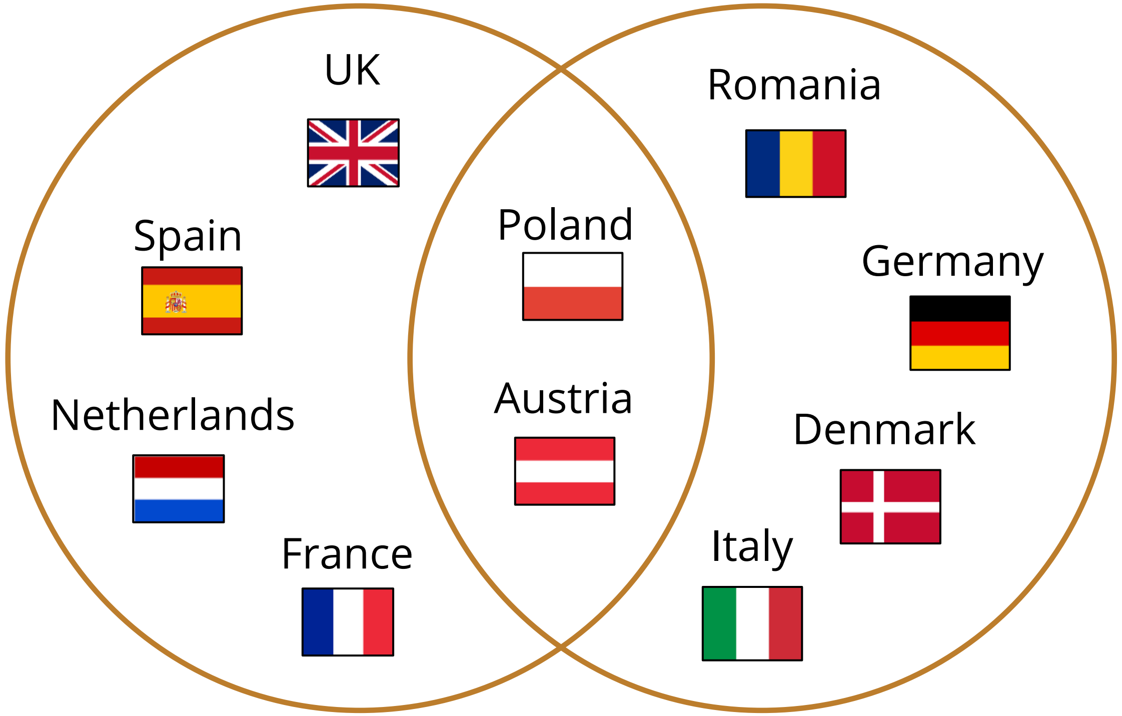
The food consumption landscape for plant-based eating in Europe is evolving at a different rate across countries.

!

Risk market

These nations have a strong appetite for plant-based options, but seem hesitant to embrace more.

Low motivation
High barriers



Successful market

These nations have a strong appetite for plant-based options, and the trend is growing.

High motivation
Low barriers

In between

These nations display a potential to increase appetite for plant-based alternatives.

High motivation
High barriers

Europe requires a holistic but tailored approach to facilitate a successful transition to plant-based diets.

1

Understand what motivates dietary change

1. Awareness
2. Personal benefits
3. Greater good

2

Normalize plant-based lifestyles

1. Inclusive approach
2. Familiar foods/ingredients
3. Gradual & supportive

3

Improve the value of plant-based alternatives

1. Social approval
2. Accessibility: beyond PoS
3. Trust

1.75

If we continue business as usual we would require the resources of nearly two Earths to sustain our way of life.
Global Footprint Network, 2022

Adopting a plant-based lifestyle is one of the most effective **ways for individuals to reduce their environmental impact.**

https://www.nature.com/collections/ebbefbfedc

Investing in plant-based proteins has the highest CO2 savings per dollar **of any sector.**

BCG/Blue Horizon report: "The Untapped Climate Opportunity in Alternative Proteins", Feb-April 2022, BCG/GFMA report, "Climate Finance Markets and the Real Economy": BCG Analysis.

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

VII. Q&A

Smart Protein Consumer Survey Results

Download the report:

https://smartproteinproject.eu/market-research/

elsa.guadarrama@proveg.com