FORBRUGERINTERESSE FOR PLANTERIG KOST

indsigter i status, forbrugersegmenter og mulig fremtidig udvikling

AARHUS BSS
MAPP CENTRE – RESEARCH ON VALUE CREATION IN THE FOOD SECTOR
DEPARTMENT OF MANAGEMENT
AARHUS UNIVERSITY

2022

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AGENDA

- ❑ **Status** – how large and widespread is interest in plant-rich diets so far?
- ❑ **Segments** – which different segments differing in views & actions are in Denmark?
- ❑ **Future** – how might the market trend develop further from here?

Image: colourbox

DATA FROM PLANTPRO PROJECT

Innovationsfonden

Funded by Innovation Fund Denmark
grant nr 0224-00044B

See more at https://mgmt.au.dk/plantpro/

8.4 mill DKK investment by IFD

April 2021- March 2024

18 partners
MAPP Centre /Aarhus University, Food Science / University of Copenhagen, Copenhagen Business School, Plantebranchen, Dansk Vegetarisk Forening, Simple Feast, Beyond Coffee, Thinktank OneThird, Circular Food Technology, Møllerup Brands, Food Innovation House, Orkla, Naturli, Planteslagterne, Upfield, Eachthing, Rema1000, Fair Trees.

Reduced food waste

Plant-Rich diets

Technology acceptance

PLANTPRO 'BENCHMARK' SURVEY

/nnovationsfonden

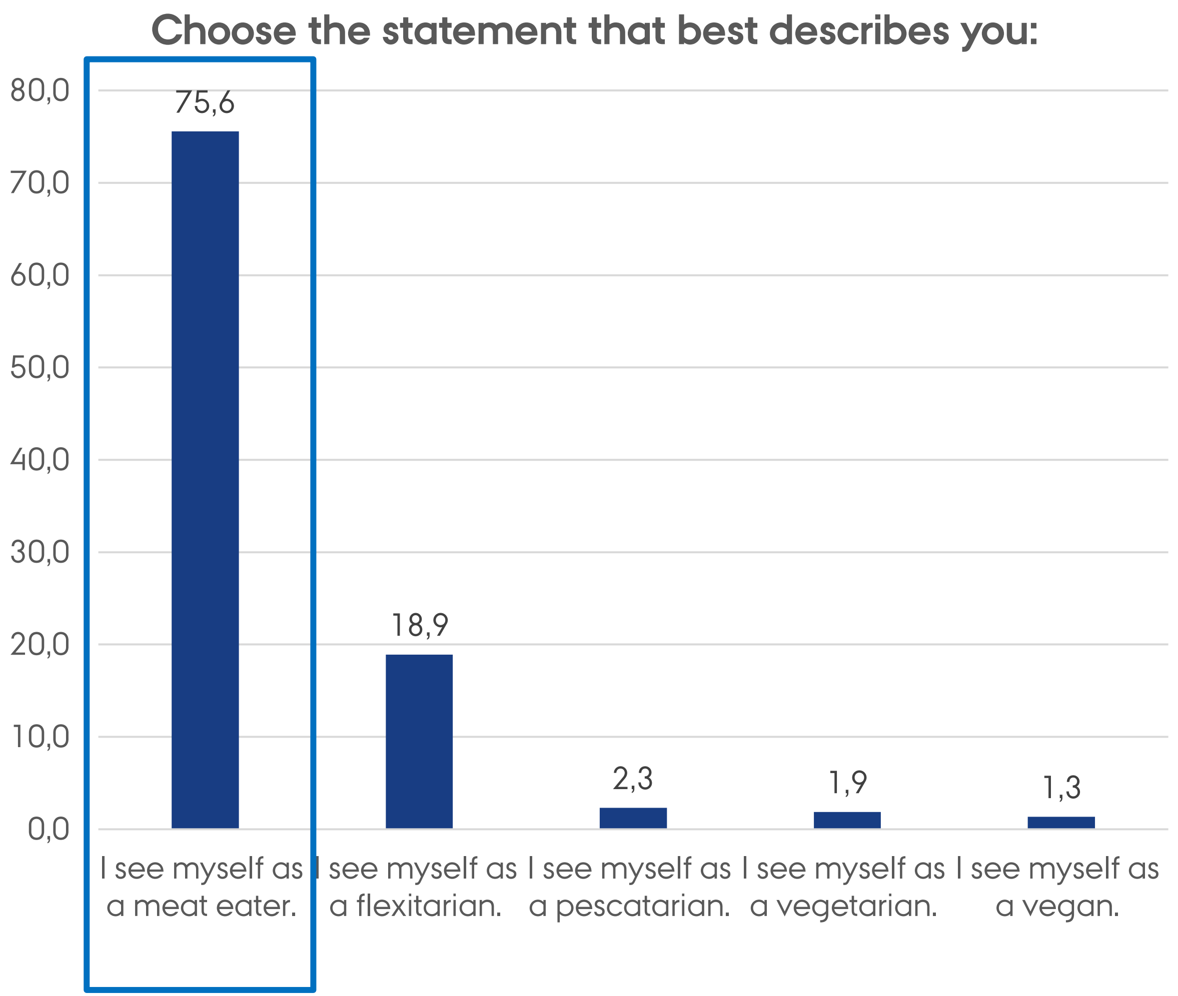
If not indicated otherwise, the data is from the 'benchmark' survey conducted in May 2021.

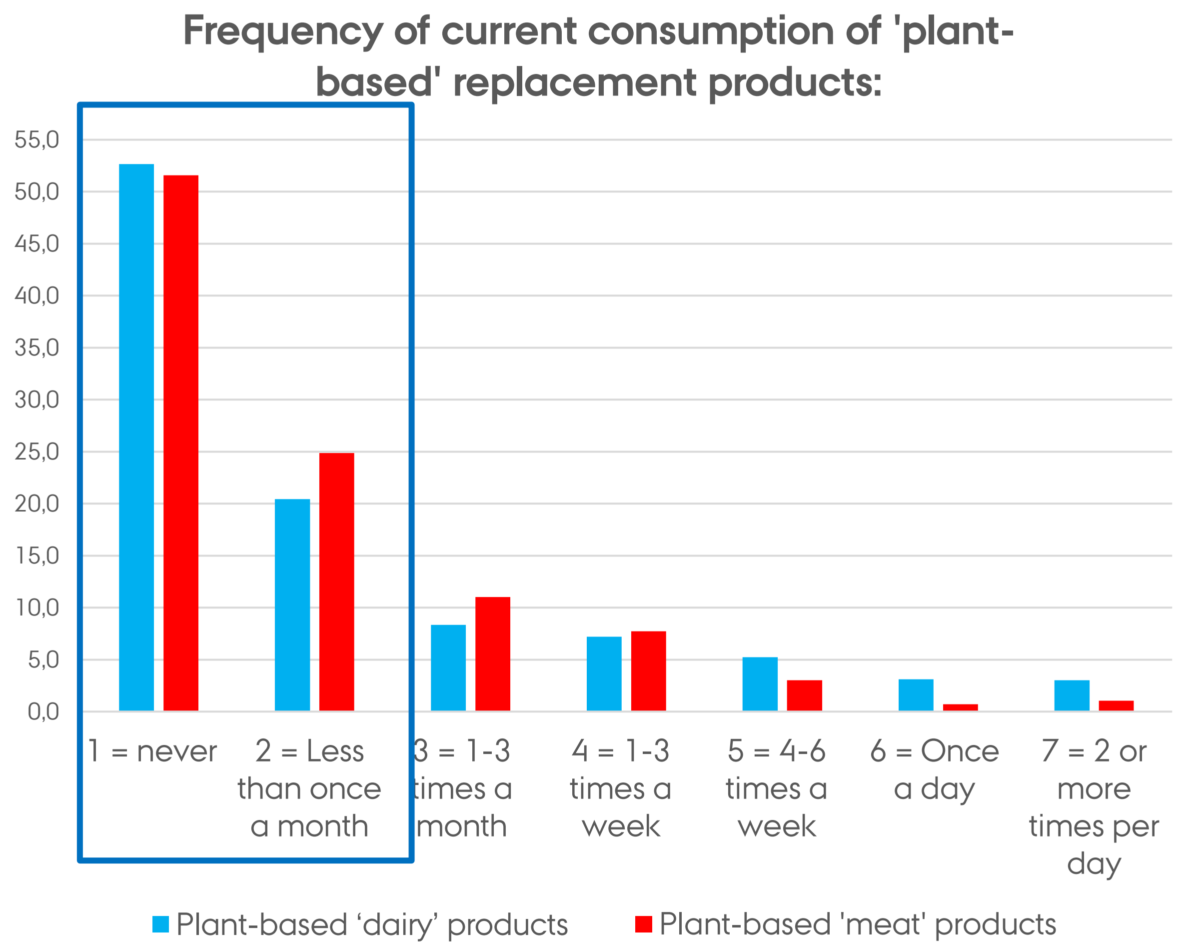
Aim of Benchmark: survey at the start, middle and end of the project to be able to ***measure progress*** in terms of the objectives of the project.

Data of the Benchmark: Representative Danish consumer sample - 1126 responses (after data cleaning).

STATUS – HOW LARGE AND WIDESPREAD IS INTEREST IN PLANT-RICH DIETS SO FAR?

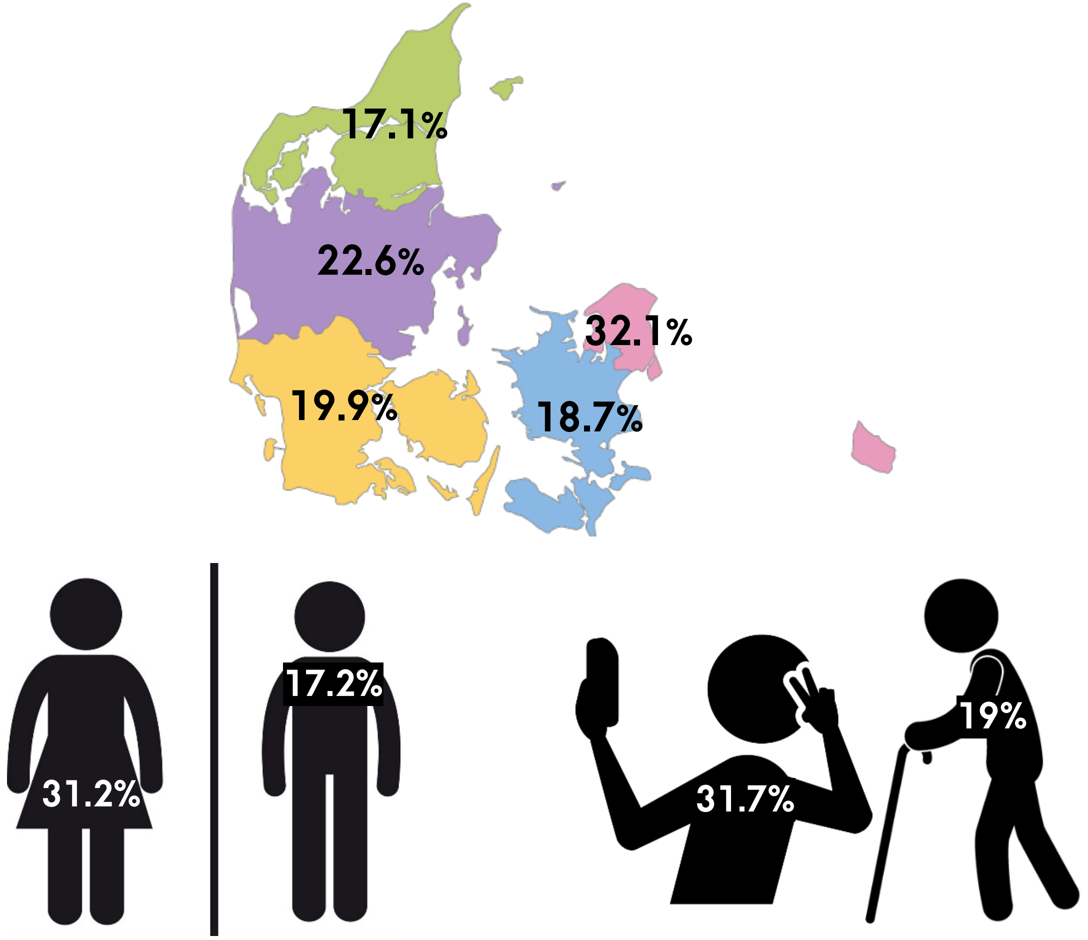
SELF-PERCEPTION AND CONSUMPTION



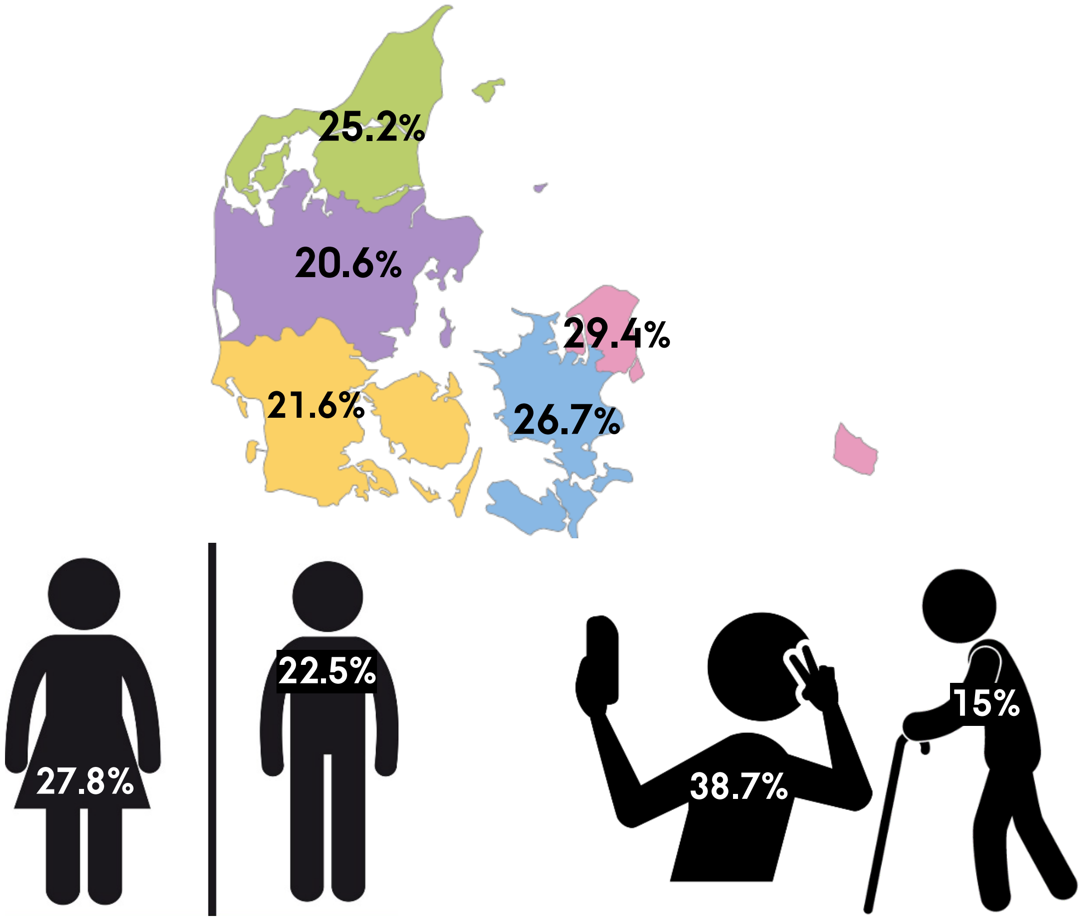


SELF-PERCEPTION AND CONSUMPTION

Choose the statement that best describes you: non meat-eaters (all together)



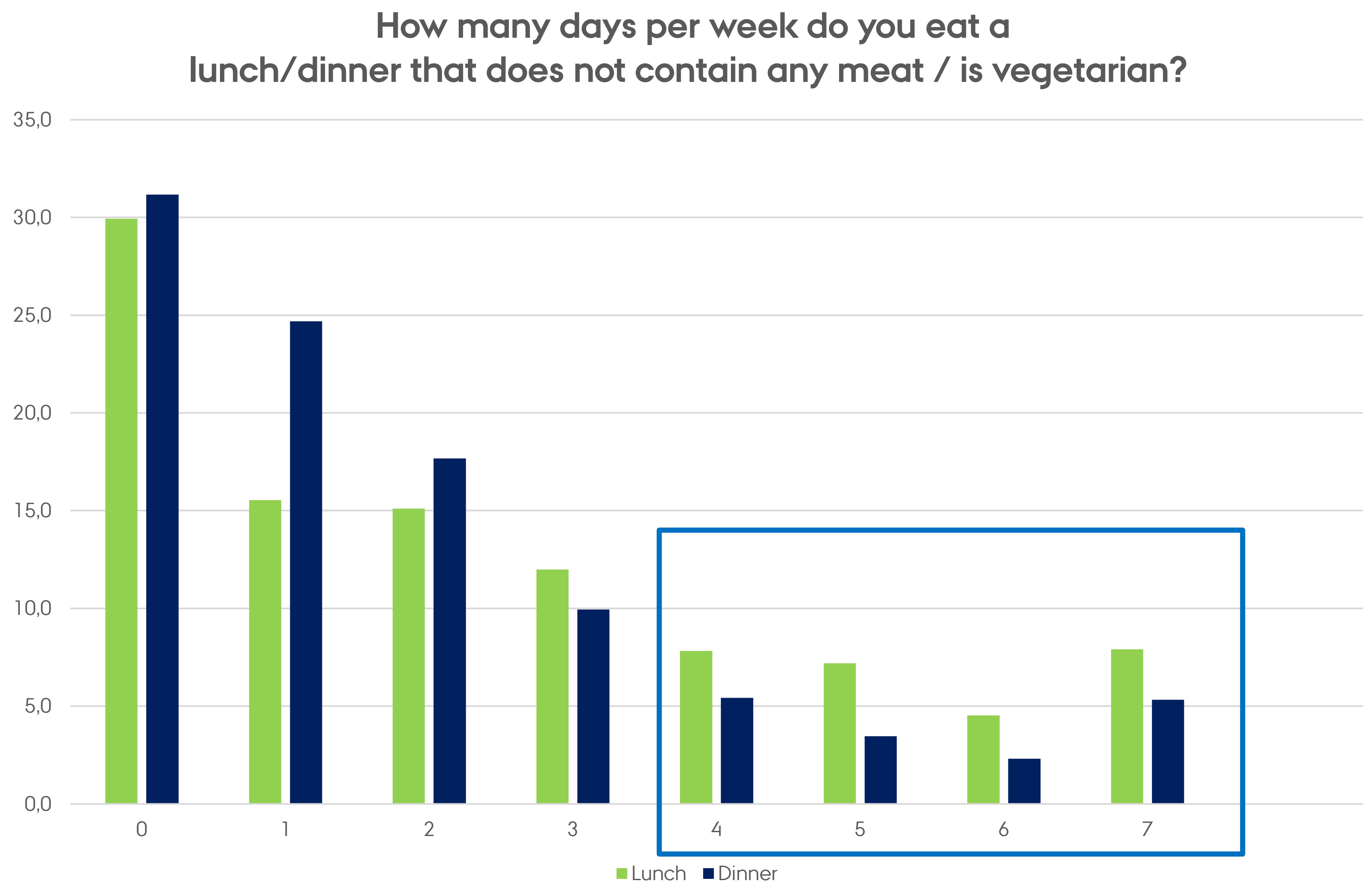
Frequency of current consumption of 'plant-based' replacement products: more than once a month



LUNCH OR DINNER WITHOUT MEAT

Lunch 27.4% - 4 or more days out of the week

Dinner 16.5% - 4 or more days out of the week



DK COMPARED TO EUROPE

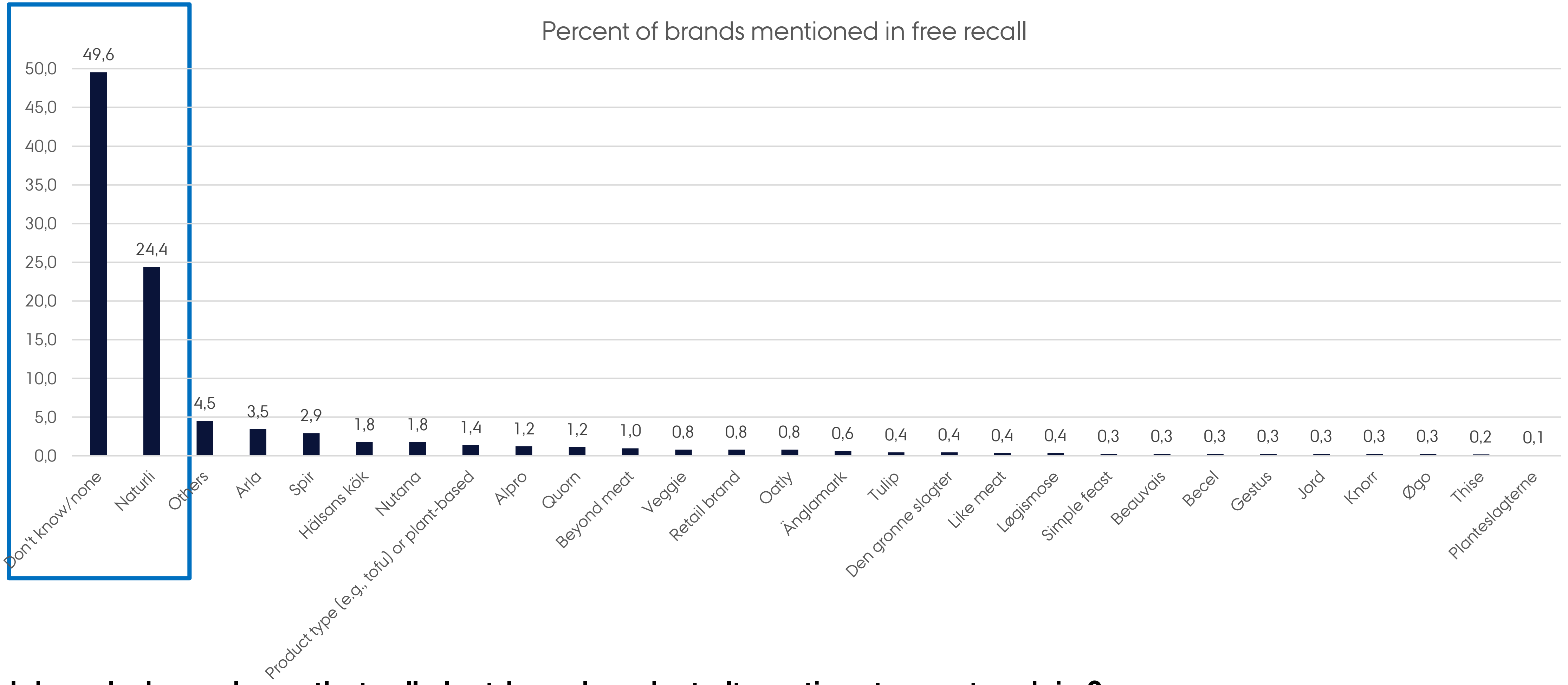
According to the EU project SmartProtein:

- ❑ 30% of Europeans identify as ‘flexitarians’ and 7% as ‘plant-based diet’

Share of flexitarians / following a plant-based diet per country:

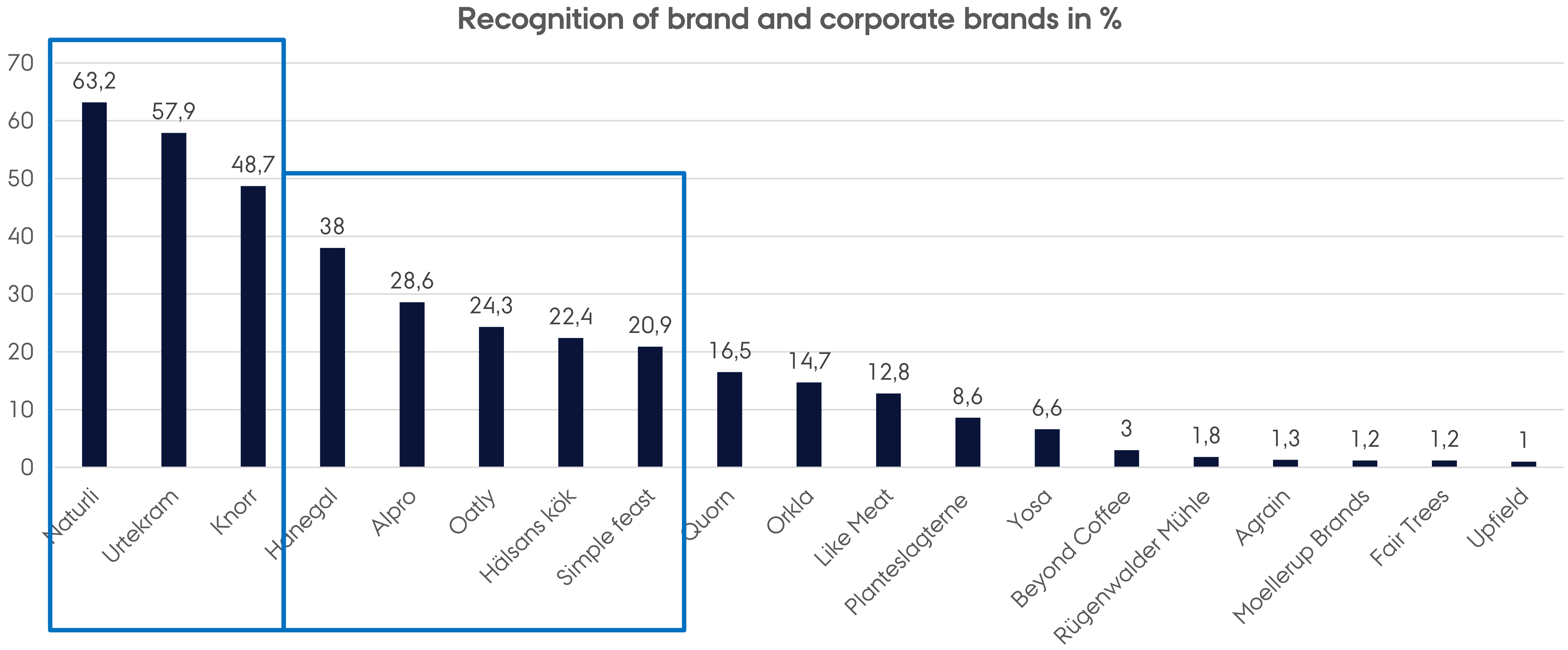
- ❑ Denmark 27% / 7%
- ❑ Germany 30% / 10%
- ❑ Netherlands 42% / 7%
- ❑ UK 23% / 9%

BRAND AWARENESS (UNAIDED)



"Which brands do you know that sell plant-based product alternatives to meat or dairy? Please name as many as you can think of!"

BRAND AWARENESS (AIDED)



"Which of the following brands and producers that sell plant-based product alternatives to meat or dairy products do you recognize having seen or heard of? Please tick as many as you recognize!"

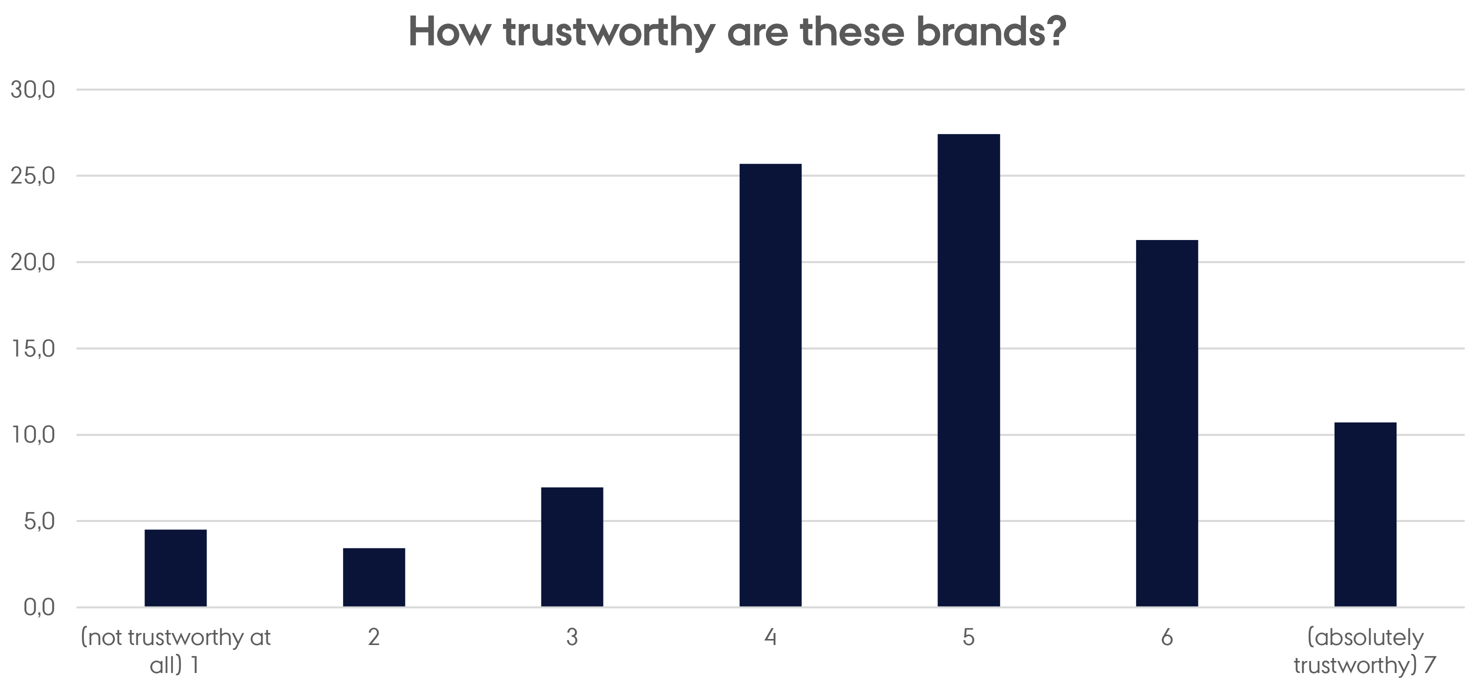
TRUST IN PLANT-BASED BRANDS

Mean= 4.72, SD= 1.46

15.1% negative

26.5% neutral

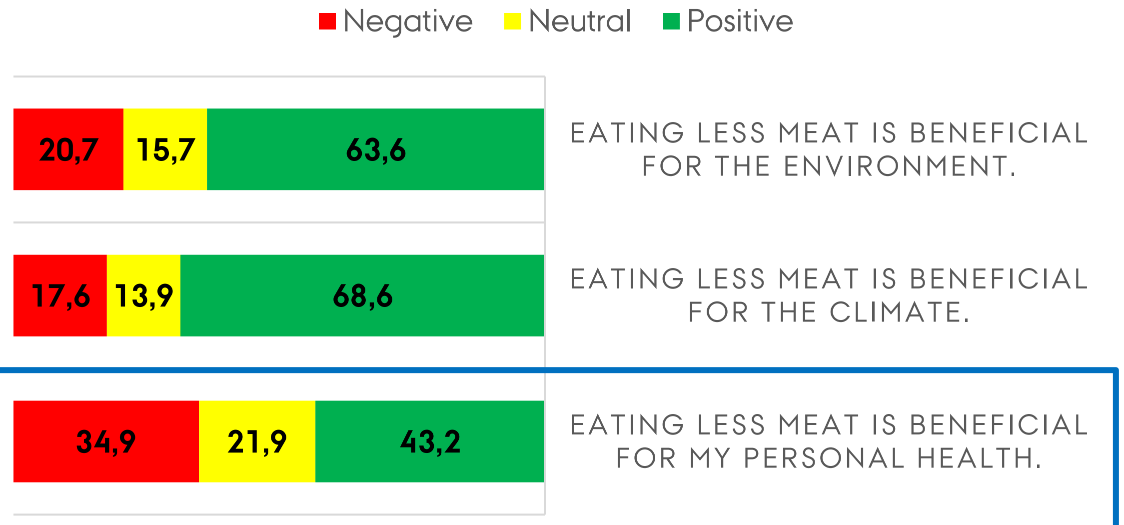
58.4% positive



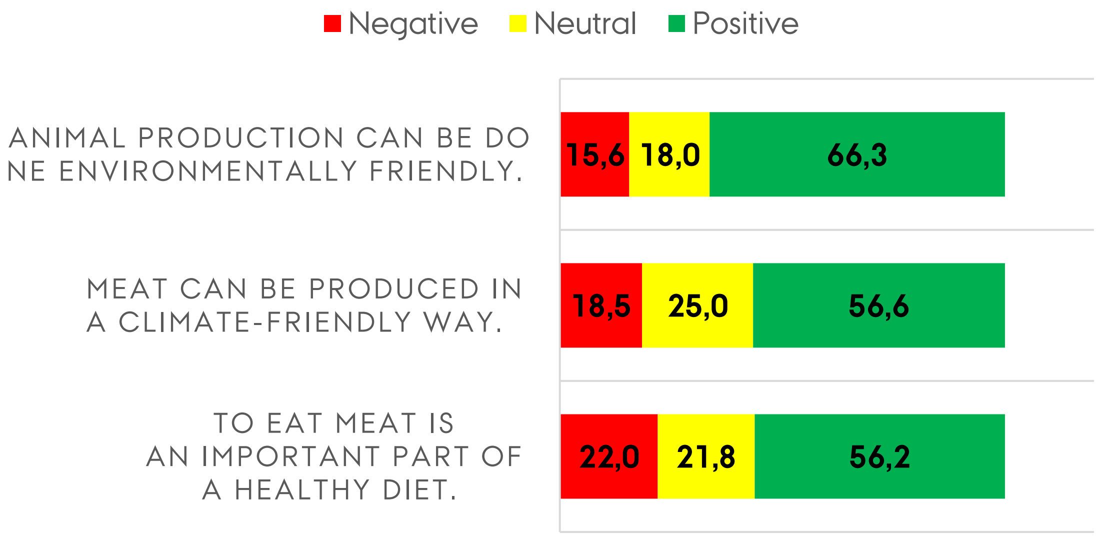
"How trustworthy do you think are these brands that you have just seen?"

BELIEFS ABOUT MEAT REDUCTION / MEAT

NEGATIVE PERCEPTIONS OF MEAT CONSUMPTION



POSITIVE PERCEPTIONS OF MEAT CONSUMPTION



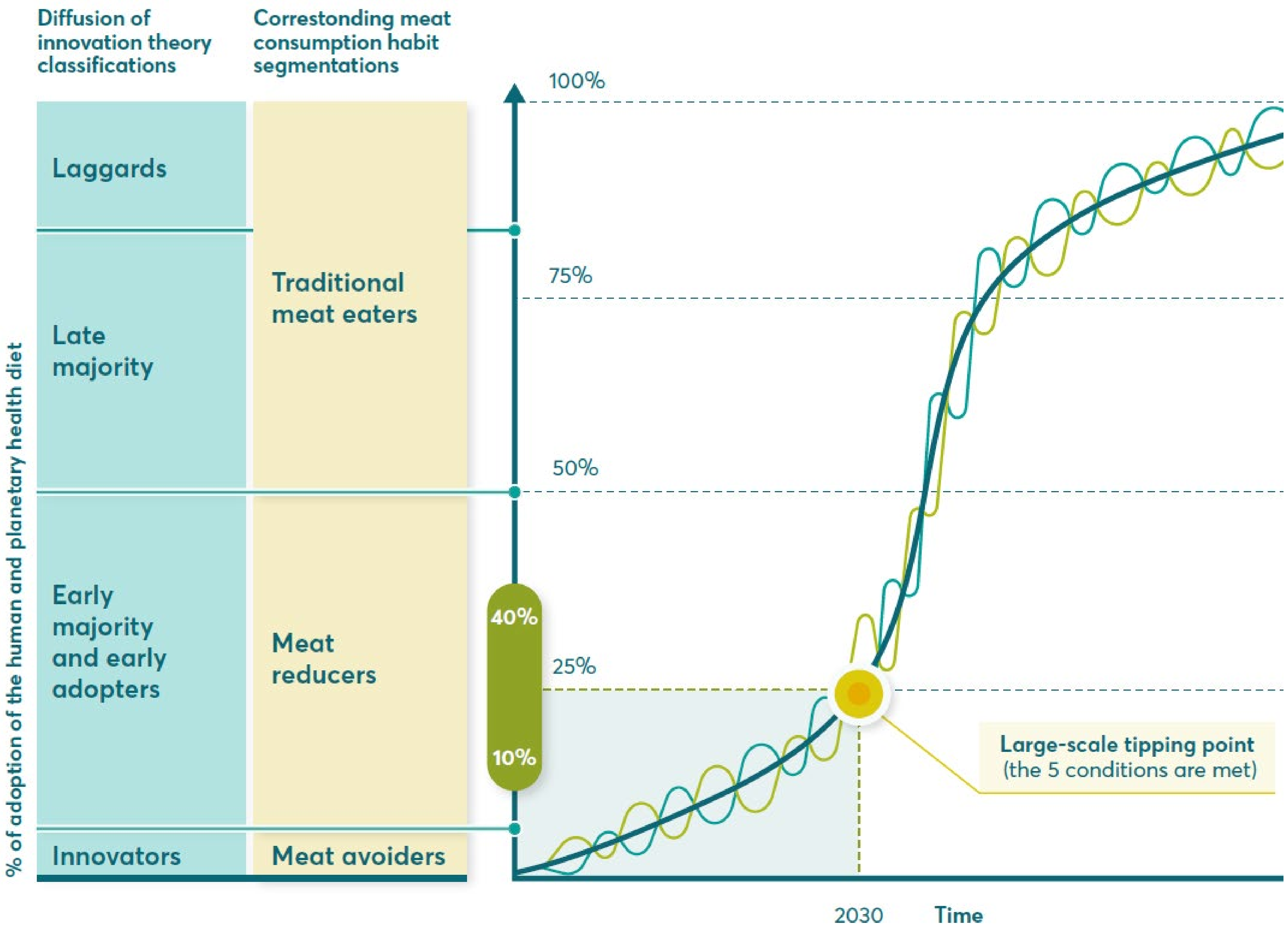
CONFLICT 'PLANT VS MEAT' ?

	Disagree (1/2/3)	Neutral (4)	Agree (5/6/7)
I perceive the public discussion around food as highly polarized.	12.8%	30.3%	56.9%
I would like people to be more tolerant towards different dietary choices.	11.9%	19.6%	68.4%
I feel judged for my food choices.	59.8%	17.7%	22.6%
I think food consumption is a matter of personal freedom.	11.4%	17.5%	71.1%
When someone appears to lecture me about which food to eat, I have found myself reacting with the opposite.	40.8%	25.6%	33.7%
I perceive there is a narrative based on 'us' versus 'them' when it comes to eating meat or plant-based foods.	18.0%	20.6%	61.4%

STATUS – HOW LARGE AND WIDESPREAD IS INTEREST IN PLANT-RICH DIETS SO FAR?

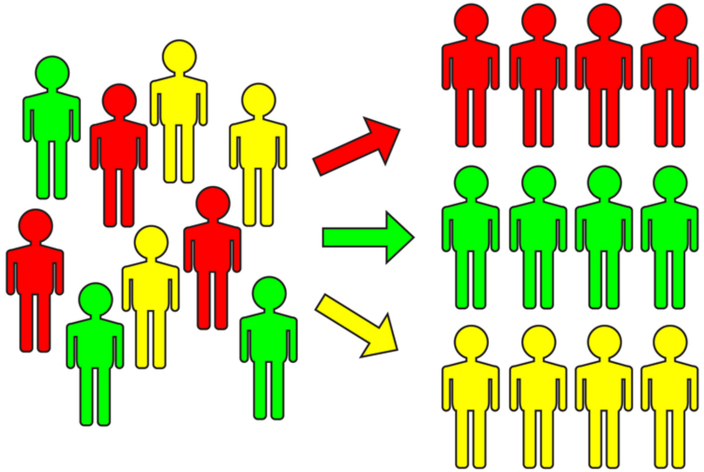
- Circa a quarter of the Danish population is ~ 'flexitarian'
- High trust in brands but yet low top of mind awareness of brands
- Effect of meat reduction / more plant-based on health potential barrier
- 2/3 perceive quite a conflict around the issue in society

SEGMENTS – WHICH DIFFERENT SEGMENTS DIFFERING IN VIEWS & ACTIONS ARE IN DENMARK?



The Food and Land Use Coalition (FOLU) and the Globals Systems Institute at the University of Exeter (2021) Accelerating the 10 Critical Transitions: Positive Tipping Points for Food and Land Use System Transformation. https://www.foodandlandusecoalition.org/wp-content/uploads/2021/07/Positive-Tipping-Points-for-Food-and-Land-Use-Systems-Transformation.pdf

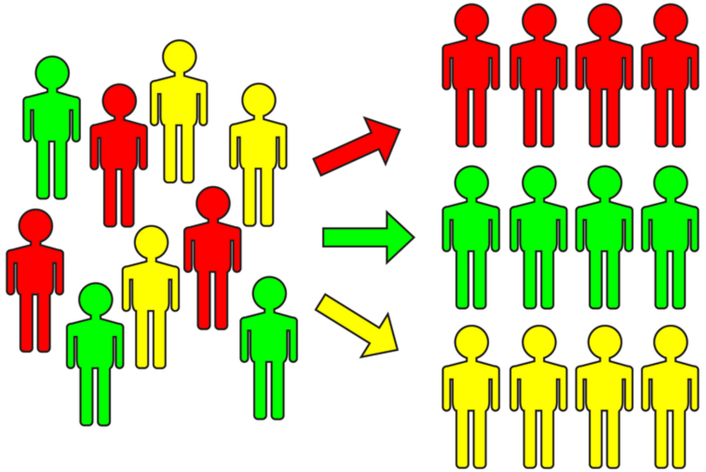
CONSUMER SEGMENTATION APPROACH



1) Segment identification based on mainly psychographic variables.
Perception of conflict, knowledge/beliefs about meat reduction benefits and sustainability of meat production, environmental concern, knowing others who have reduced meat consumption and importance of these.

2) Segment characterization based on mainly sociodemographic variables.
Gender, age, region, education, identification as meat-eater, cooking capability, etc.

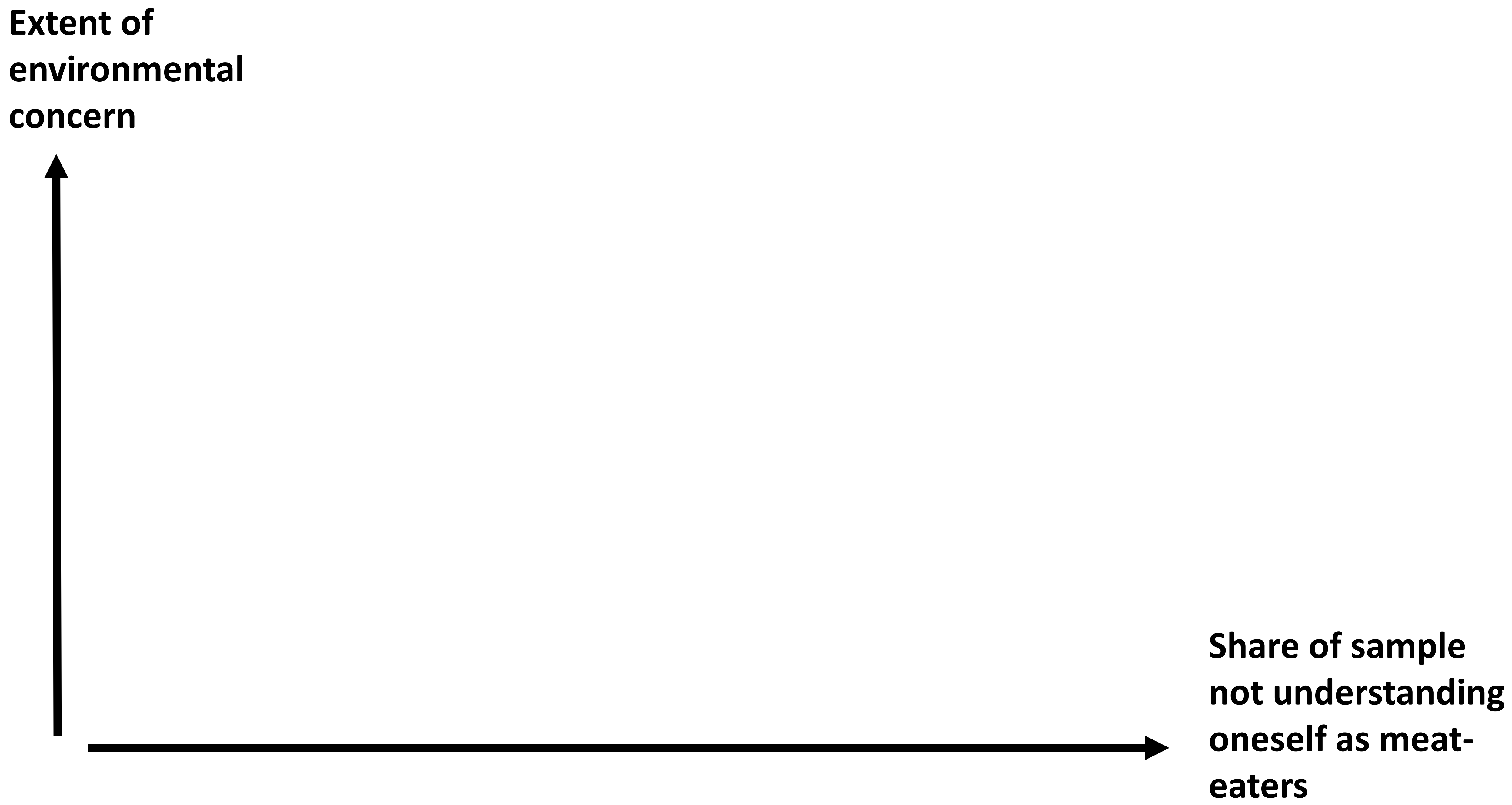
CONSUMER SEGMENTATION APPROACH

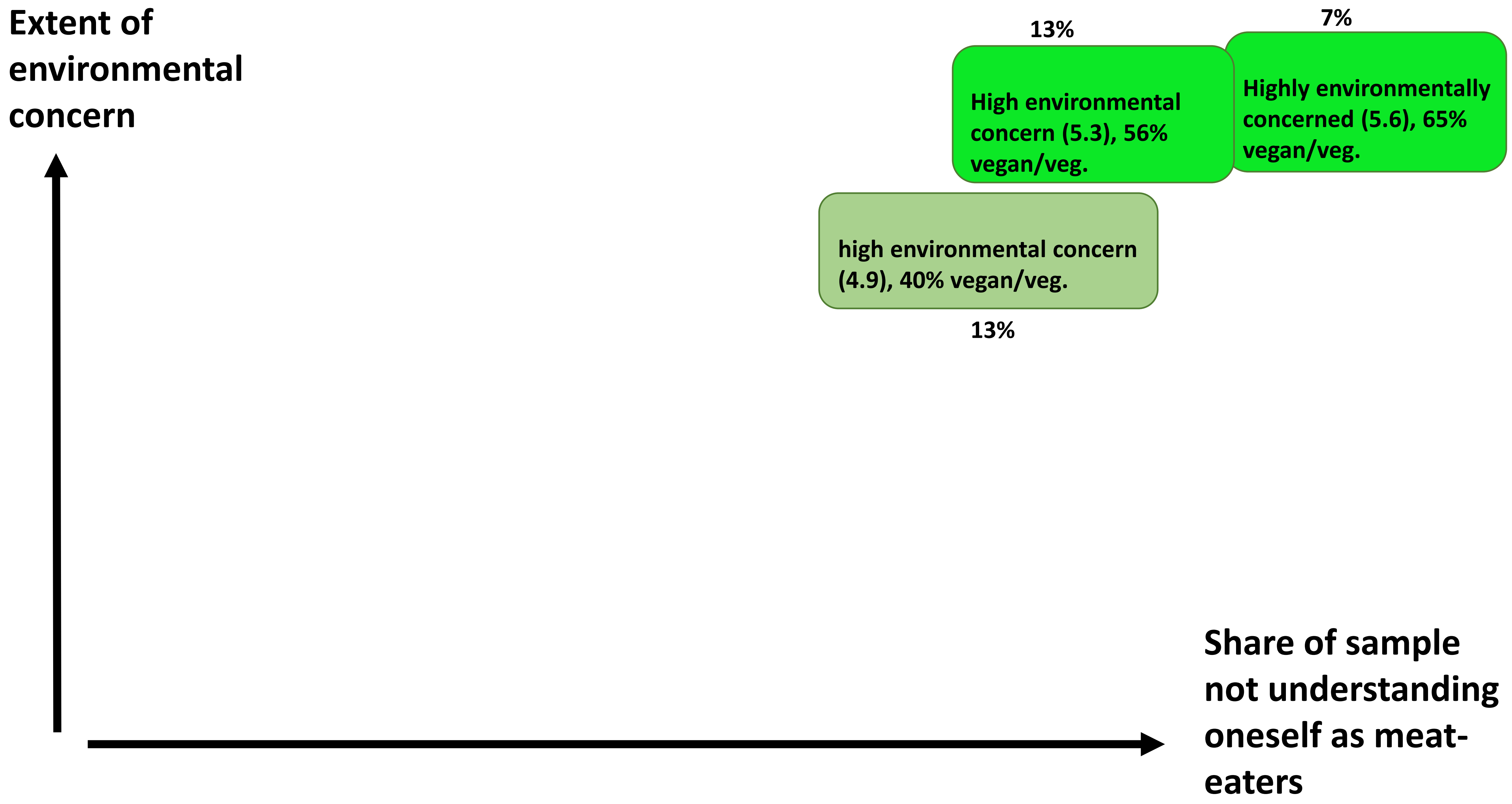


3) Segment names that help understanding.

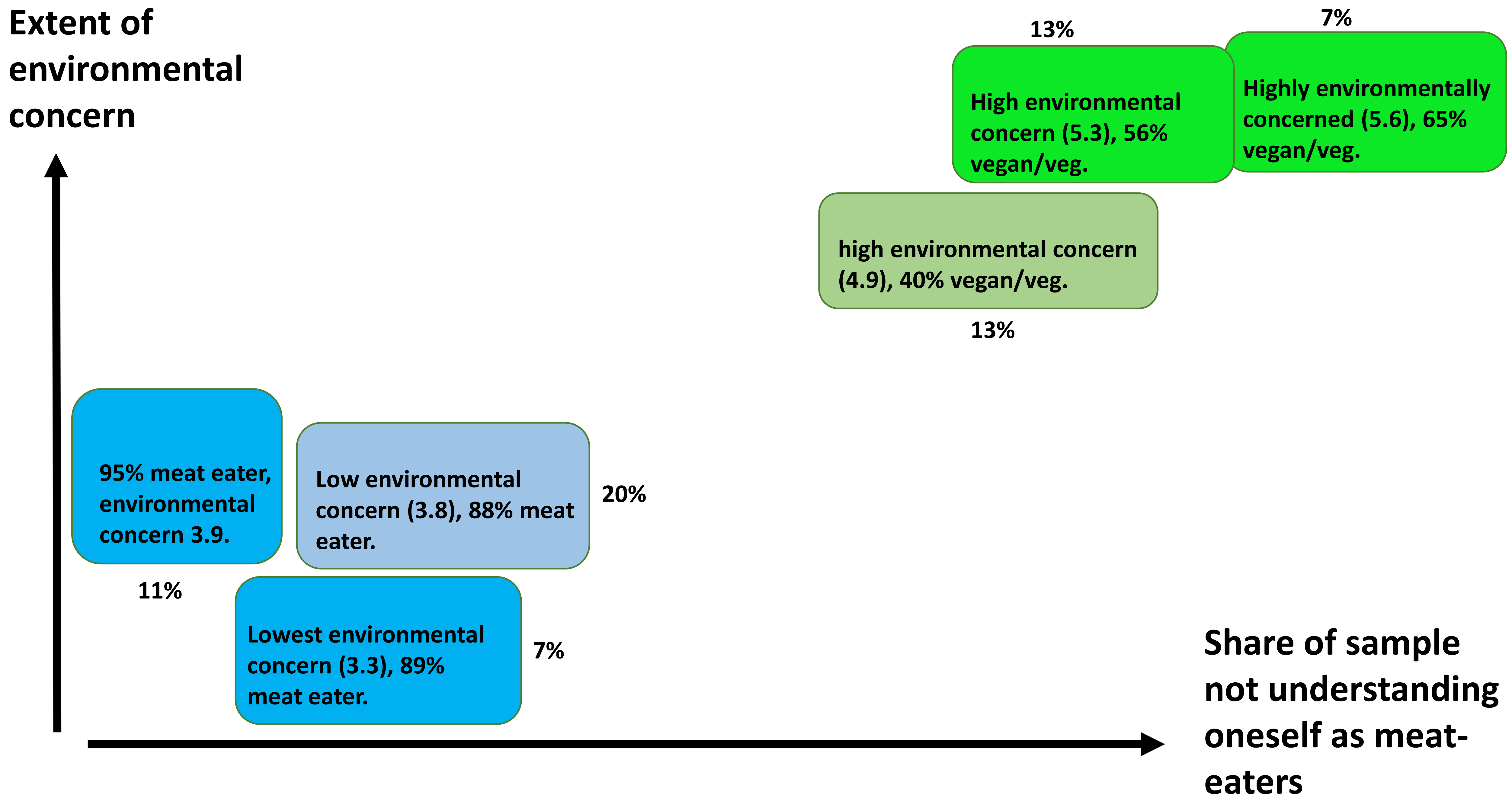
Names that describe the most relevant distinctions, these might exaggerate and stereotype to carve out the differences.

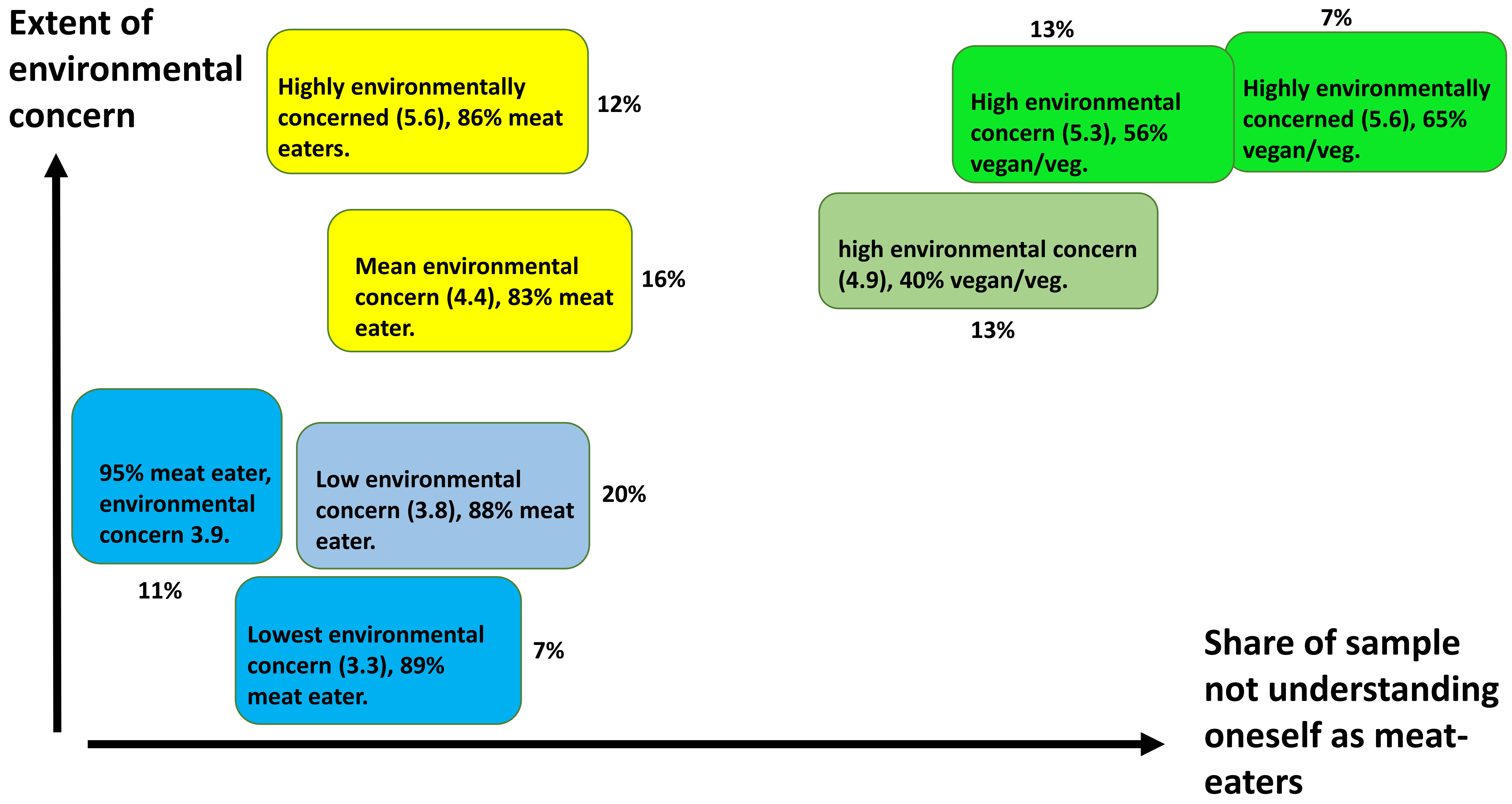
Note: while helpful in applying the results, there is a danger of over-interpretation / insinuation of aspects not supported by data!


Extent of environmental concern
Share of sample not understanding oneself as meat-eaters



Extent of environmental concern
13%
High environmental concern (5.3), 56% vegan/veg.
7%
Highly environmentally concerned (5.6), 65% vegan/veg.
high environmental concern (4.9), 40% vegan/veg.
13%
Share of sample not understanding oneself as meat-eaters


Extent of environmental concern
13%
7%
High environmental concern (5.3), 56% vegan/veg.
Highly environmentally concerned (5.6), 65% vegan/veg.
high environmental concern (4.9), 40% vegan/veg.
13%
95% meat eater, environmental concern 3.9.
Low environmental concern (3.8), 88% meat eater.
20%
11%
Lowest environmental concern (3.3), 89% meat eater.
7%
Share of sample not understanding oneself as meat-eaters



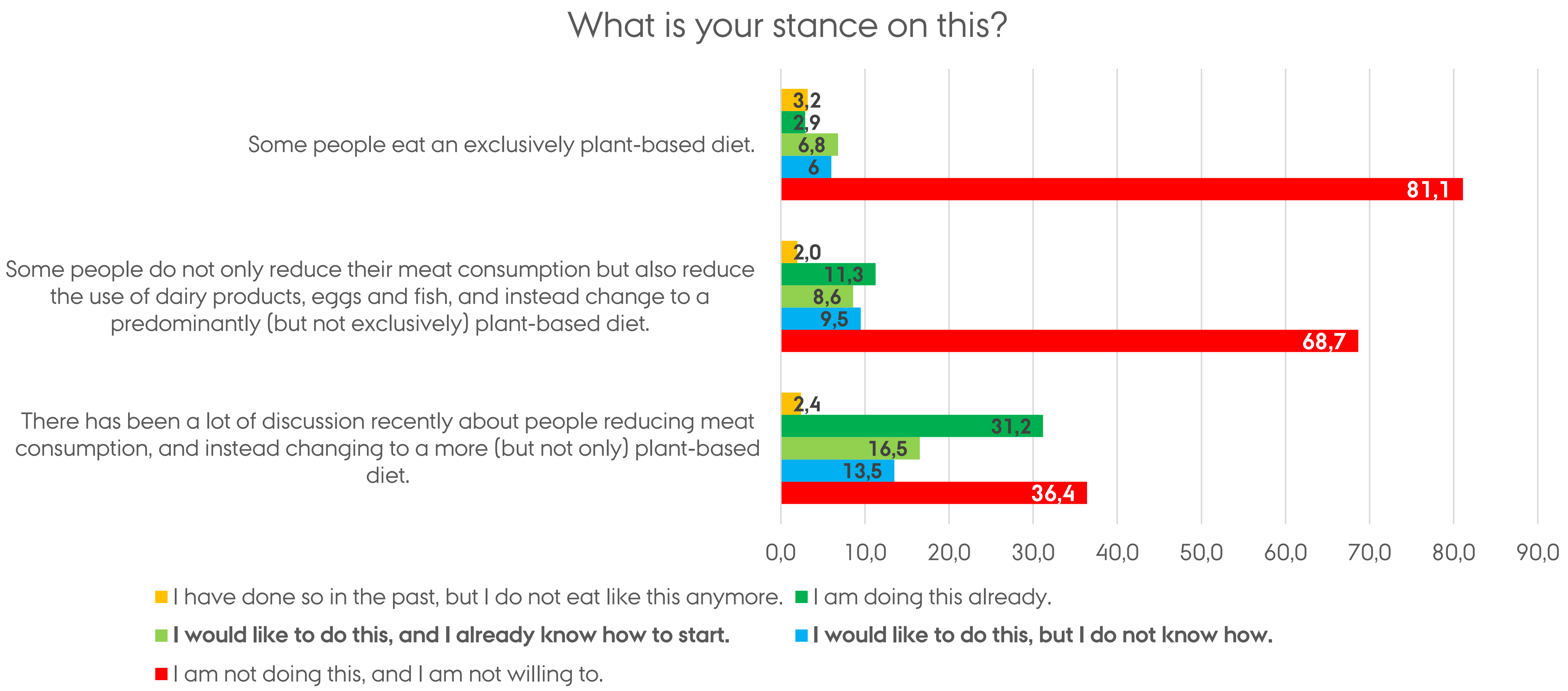
Extent of environmental concern
Highly environmentally concerned (5.6), 86% meat eaters.
12%
Mean environmental concern (4.4), 83% meat eater.
16%
95% meat eater, environmental concern 3.9.
11%
Low environmental concern (3.8), 88% meat eater.
20%
Lowest environmental concern (3.3), 89% meat eater.
7%
13%
High environmental concern (5.3), 56% vegan/veg.
7%
Highly environmentally concerned (5.6), 65% vegan/veg.
high environmental concern (4.9), 40% vegan/veg.
13%
Share of sample not understanding oneself as meat-eaters

SEGMENTS – WHICH DIFFERENT SEGMENTS DIFFERING IN VIEWS & ACTIONS ARE IN DENMARK?

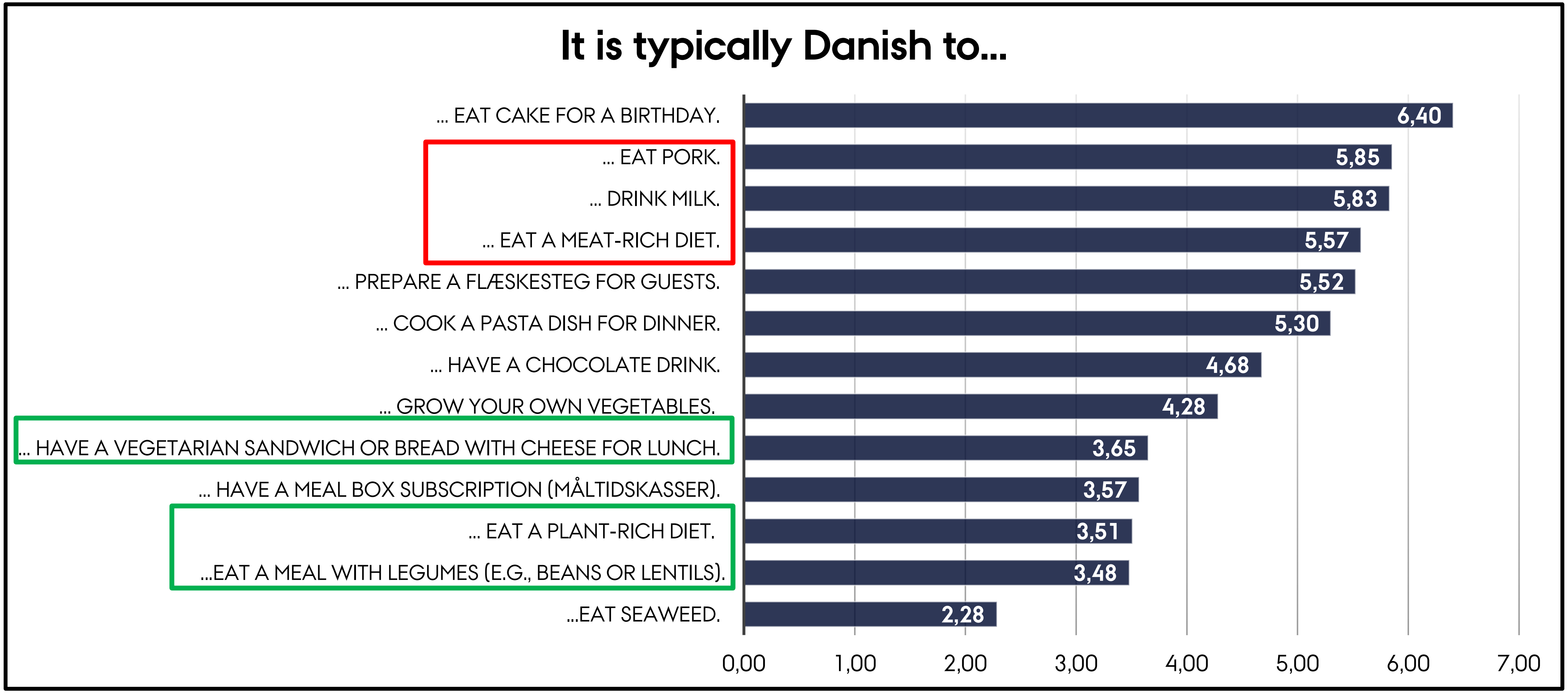
- Clear distinction of segments ~ current, potential, and unlikely consumers
- Important differences in degree of environmental concern, believe in benefit of meat reduction, and knowing others who have reduced meat

FUTURE – HOW MIGHT THE MARKET TREND DEVELOP FURTHER FROM HERE?

INTENTION TO CHANGE DIET?



PLANT-BASED & DANISH CULTURE?



PREVIOUS TRANSITIONS?

Source: https://www.fodevarefokus.dk/oe-maerket-fylder-30-aar/

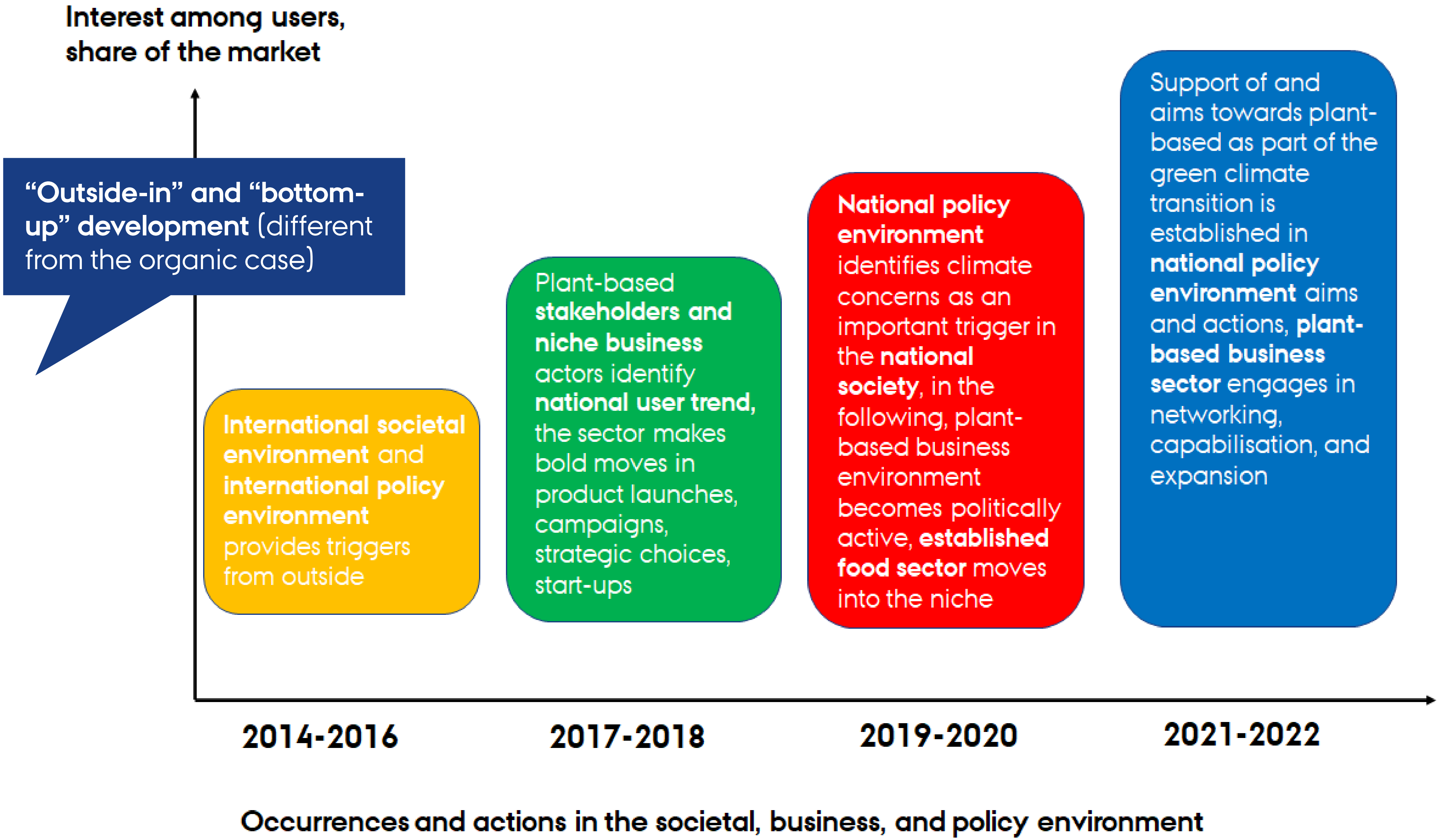
Source: colourbox

Source: colourbox

SOME LESSONS – FOOD TRANSITIONS

- Organic food – crucial role of a strong and unified label and retail engagement
- Wholegrain partnership – collaborative and fast action with a common goal
- Food waste actions – first mover advantages and trigger of NGO activity
- Research and government driven approach to more plant-based diets
- Innovation and business opportunity focused narrative towards plant-oriented sector change
- Demand driven market re-orientation towards plant-based and 'clean label' focused product diversity

Ongoing and yet-unpublished results from the Innovation Fund funded Grand solutions project PLANTPRO – see https://mgmt.au.dk/plantpro/
a collaboration of AU, CBS, KU and with the collaboration of amongst others DVF, Plantebranchen, and business partners across the sector.


Interest among users, share of the market
"Outside-in" and "bottom-up" development (different from the organic case)
International societal environment and international policy environment provides triggers from outside
Plant-based stakeholders and niche business actors identify national user trend, the sector makes bold moves in product launches, campaigns, strategic choices, start-ups
National policy environment identifies climate concerns as an important trigger in the national society, in the following, plant-based business environment becomes politically active, established food sector moves into the niche
Support of and aims towards plant-based as part of the green climate transition is established in national policy environment aims and actions, plant-based business sector engages in networking, capabilisation, and expansion
2014-2016
2017-2018
2019-2020
2021-2022
Occurrences and actions in the societal, business, and policy environment

FUTURE – HOW MIGHT THE MARKET TREND DEVELOP FURTHER FROM HERE?

- There are clearly consumer groups that can be attracted next, with different strategies for each
- Assessing previous food transitions and the development so far, it appears policy actions will become crucial the coming years

THANK YOU!

PlantPro contributes to accelerating an **efficient green consumer behaviour transition** towards more plant-rich diets and reduced food waste.

We aim to fill a knowledge gap on factors that drive consumer behaviour change towards more sustainable plant-rich diets and upcycled foods and greater acceptance of sustainable food technologies.

Funded by Innovation Fund Denmark grant nr 0224-00044B /nnovationsfonden

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