PLANT-BASED FOOD IN GERMANY

Market and Consumer Insights



ABOUT THE DATA

All data was generated as part of the Smart Protein project. Smart Protein is a €10-million, EU-funded project that seeks to develop a new generation of foods that is cost effective, resource efficient, and nutritious. Alternative protein sources such as legumes and side-streams of beer and pasta production are used to generate plant-based ingredients and plant-based meat, seafood, dairy products, and baked goods.

Smart Protein Pan-European Consumer Survey

The survey asked more than 7,500 people in Germany and nine other European countries about their attitudes towards the consumption of plant-based foods, their trust in relation to such products, their current consumption habits, the key drivers of their food choices, and various other relevant topics in the field of alternative protein. The survey was carried out by Innova Market Insights in June 2021. Screener questions were established for age groups and gender, and only consumers who are responsible for household grocery shopping were surveyed. The results were published in two reports that you can download <u>here</u>!





ABOUT THE DATA



Smart Protein Plant-based Food Sector Report

This analysis is based on scanning data from Nielsen MarketTrack for Germany and 10 other European countries and covers six different plant-based products categories in each country, depending on availability (plant-based meat, fish, milk, yoghurt, cheese, and ice cream). The report shows sales values in Euros and sales volumes in kilograms or litres for the overall market, including discounters, as well as for discounters separately. The data covers moving annual totals for Sep/Oct (depending on the country, between calendar weeks 39 and 42) 2018 vs 2019 vs 2020. This means that it presents the total sales values from October 2017 to September 2018, versus October 2018 to September 2019, versus October 2019 to September 2020. Download the full report here!



KEY INSIGHTS (1/2)

Consumer profile	10% of German consumers are plant-based eaters (vegetarian+vegan), making Germany the country with the highest share of plant-based eaters among the analysed European countries. 30% of Germans identify as flexitarian.
Consumption of animal-based products	German consumers consume milk the most frequently (35% daily), followed by cheese (24% daily) and yoghurt (21% daily). In terms of meat, poultry is the most consumed (46% at least once a week).
Animal-based meat consumption	51% of German consumers have reduced their meat consumption in the past year, making Germany the country with the highest share of meat reducers after Romania among the analysed counties.
Animal-based dairy consumption	32% of consumers say they will consume fewer dairy products (e.g. milk, yoghurt, cheese) in the next six months. The market for plant-based dairy products counts among the largest and fastest growing markets in Europe.





KEY INSIGHTS (2/2)

Consumption of plant-based products	Looking at plant-based food, plant-based milk (28% at least once a week), plant-based yoghurt (21% at least once a week), and plant-based poultry and beef (20% at least once a week) are the most frequently consumed.
Plant-based meat	Compared to other countries analysed, German consumers are most likely to pay more for plant-based meat than for animal- based meat. 26% are likely to pay a higher price if the plant- based product has the same taste and texture as animal-based meat.
consumption	German consumers specifically wish they could buy plant-based minced meat, burger patties (32%), chicken breasts, and sausages (30%) in supermarkets.
	The plant-based meat market in Germany in the fastest growing among the analysed European countries.
Plant-based dairy	In terms of plant-based cheese, German consumers would especially like to see plant-based cream cheese (32%), sliced cheese (32%), and plant-based mozzarella (31%) available in supermarkets.
consumption	The market for plant-based dairy products counts among the largest and fastest growing markets in Europe. Plant-based milk is the largest segment in the German plant-based food market.
Plant-based fish	German consumers specifically wish they could buy more plant- based fish sticks (27%) and smoked salmon (22%). Sales value for plant-based fish increased by 623% over the two periods.
Preferred ingredients for plant-based foods	Potatoes (40%), rice (37%), and lentils (33%) are Germans' favourite core ingredients in plant-based foods.





Which category best describes your current dietary lifestyle?

10% of German consumers are plant-based. 30% (flexitarians) are reducing their meat consumption.

Omnivore

I frequently eat meat, such as beef, pork, chicken, turkey, fish and/or shellfish

Flexitarian I sometimes eat meat, I eat fish and/or but I am trying to reduce my meat consumption and types of meat often choose plant-

based foods instead

Pescetarian shellfish, but no other

Vegetarian I don't eat meat and fish of any kind, but I do eat eggs and/or dairy products Vegan

I don't eat meat, fish, eggs, dairy products, or any other animal-based ingredients

58		30		3 7	3
L0%	25%	50%	75%		100%
Single selection					



58% of Germans have been following their current diet lifestyle for more than 5 years.

	Less than six months	6 month to 2 year	s 2 to 5 years	More than 5 years	
11	19	12	58		
I 0% Single selec	25% tion		50%	75%	1 100%





Which statement best describes how frequently you have consumed the following foods in the last 12 months? (1/2)

German consumers eat fruit and vegetables the most frequently, followed by milk and cheese.

0	ess than nce a ìonth	1-3 times a month	1-3 times a week	4-6 time week	es a 📕 Once	a day 📕	2 or more times per day	
Beef	13	28	3	5		16	4 3	1
Poultry	9	11 34		33			8 4	1
Pork	19	17	28		23		9 3	1
Fish/seafood	13	20	34		24		5 2	1
Milk	7 8	14	22	16	31			4
Yoghurt	5 8	18	27		21	19		2
Cheese	4 6	12 26	;	28		21		3
Ice cream	6 25	5	31		23		95	1
Eggs	39	24	<mark>43</mark>			14	7	2
Pastries/ cakes, cookies	3 14	29		31		14	7	2
	L 0% Single sele	25% ction)	50%	7	5%	100	 1%





Which statement best describes how frequently you have consumed the following foods in the last 12 months? (2/2)

ono	ss than ce a onth	1-3 mo	times a nth	1-3 times a week		4-6 tim week	ies a	0	nce a d	tiı	or mo nes p ay		
Pulses ¹	5 1	6	36				26			12		4	1
Vegetables	12 9	30			26			2	28			4	
Fruit	15	11	23	2	27			3	0			4	
Quinoa	49					17		1	4	10	5	3	1
PB beef ²	48					16		17		9	7	3	1
PB poultry ³	49					15		16		10	7	2	1
PB pork ⁴	56						13		13	9	6	2	1
Tofu/tempeh/ seitan	49					17		15		10	5	3	2
PB fish/seafood⁵	64							10	12		7	42	1
PB milk ⁶	45				14		13		10	9	7	2	
PB yoghurt ⁷	51					15		12	2	10	7	3	1
PB cheese ⁸	57						13		12	9	7	2	1
PB ice cream/ sorbet	57						15		13	6	5	3	1
PB pastries/ cookies/cakes	55					1	7		12	8	Ę	52	1
	0%	lection Ev	25%	tila baana 21 P		0%		alakar	75%		001100	100%)

Single selection | Examples: 1: lentils, beans 2: PB burger/mince 3: PB chicken strips/chunks 4: PB sausage/ pulled pork 5: PB fish sticks/fish burger/tuna 6: soya almond/oat/coconut/rice/pea milk 7: soya/almond/oat/ coconut yoghurt 8: PB cream cheese/cheese slices/grated cheese

$\mathbf{04}$

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

51% of German consumers now eat less meat compared to a year ago.

A lot less	
A change of more than 50%	

Slighty less A change of less than 50%

No change

A change of less than 50%

Slighty more A lot more A change of more than 50%

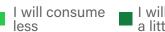
17	34	44		4 1
0%	25%	50%	75%	100%
Single selection				





Q5 Do you intend increasing or reducing your consumption of the following food categories in the next six months?

Nearly 42% of German consumers intend to reduce their meat consumption in the next six months. 32% plan on consuming less dairy.

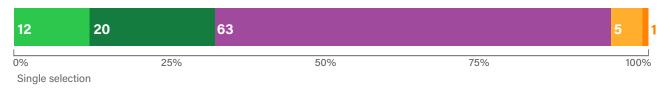


I will consume a little less

I will consume about the same I will consume a little more

me I will consume more

d Dairy products (e. g. milk, yoghurt, cheese)



D Meat products (e. g. beef, pork, chicken)

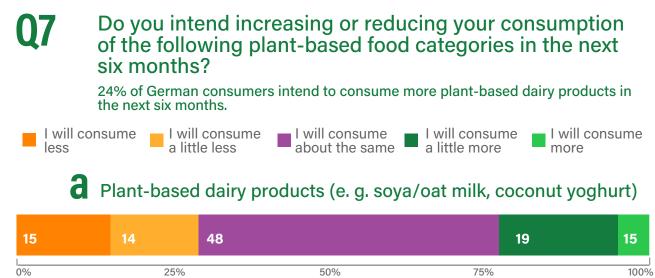
11	30	54		5 0
0%	25%	50%	75%	100%
Single selectio	n			

Q6 How important is an organic label for you when it comes to plant-based food products (e.g. meat/dairy alternatives)

48% of German people think an organic label is important when it comes to plantbased food products.

Not at a	t important all	Somewhat unimportant	Neither important nor unimportant	Somewhat important	Very important
10	17	25	30		18
0% Single sel	ection	25%	50%	75%	100%





Single selection

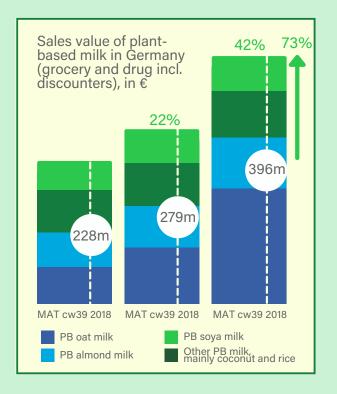
Plant-based dairy

Germany has the largest plant-basedmilk sector (€396m) of the countries analysed. Oat milk (€184m) is by far the leading segment as well as the fastest growing, surpassing soya (€74m) in the 2019 period.

A similar picture is evident in discount stores, which constitute 28% of sales value.

Plant-based milk has the largest share of the plant-based-food sector in Germany, indicating that this category is becoming mainstream. However, the market for plant-based milk is still not saturated, as the double-digit growth rates suggest.

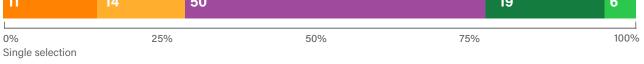
Germany also leads the European market for plant-based yoghurt (€127m). Soya (€107m) dominates this segment, followed by coconut and lupine. This category experienced double-digit growth of 48% over the two periods, with 12% of sales values coming from discount stores.



Plant-based ice cream also showed huge growth over the past two periods (78%), with a total sales value of €67m. Most sales came from family packs and multipacks, with single packs being less relevant. 23% of sales values came from discount stores.



Do you intend increasing or reducing your consumption of the following plant-based food categories in the next six months? 25% of German consumers intend to consume more plant-based meat products in the next six months. I will consume less a little more a little less about the same a little more Plant-based meat products (e. g. plant-based burgers/sausages) 50 19 6



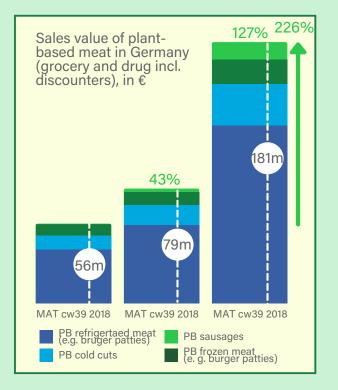
Plant-based meat

The plant-based meat sector in Germany is one of the largest and fastest-growing among the 11 European countries analysed.

Sales of vegan and vegetarian meat alternatives accounted to an impressive €357m over the last period, with more than half of sales coming from vegan products (€181m/51%), as shown in the figure on the right.

In this segment, plant-based refrigerated meat (e.g. burger patties, nuggets, mince) is by far the most successful category in Germany (€123m). Although plant-based frozen meat (e.g. burger patties, nuggets, minced) had the lowest sales value (€12m), it is the fastest growing category, with a sales increase of 403%, just in the latest period.

Discount stores are important for the German plant-based meat sector, accounting for 30% of sales value and 35% of sales volume.



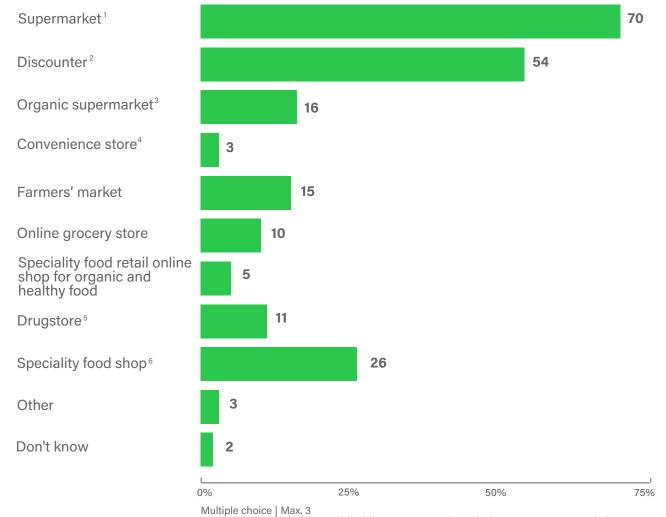
Discount-store sales are dominated by plant-based refrigerated meat (€38m), but other segments have also increased their share over the two periods, now accounting for almost two-thirds of all plant-based-meat sales in German discount stores (€16m).





Q8 Where are you likely to purchase food products most frequently from in the future?

German consumers prefer supermarket and discount stores for grocery shopping.



Examples: 1: Rewe, Edeka 2: Aldi, Lidl, Penny 3: Denn's 4: Kiosk 5: Rossmann, DM 6: bakery



Please indicate how much you disagree or agree with each of the following statements with regards to barriers towards eating new plant-based food products and following a plant-based diet? (1/2)

The key barriers towards plant-based products for German consumers are lack of taste, choice, and family/partner who won't eat plant-based.

Strongly disagree

I don't want to change my eating habits or routine.

Plant-based food products would not be filling enough.

I don't want people to think I'm being difficult or too alternative.

I think humans are meant to eat lots of animal-based meat.

I wouldn't get enough energy or strength from plant-based food products.

Plant-based food products would not be tasty enough.

I would need to eat a large quantity of plant-based foods to feel full.

Plant-based food products look too unusual.

There is not enough choice in plant-based food when I eat out.

I don't know what to eat instead of lots of animal-based meat.

Plant-based food products are inconvenient.

My family/partner won't eat plant-based food products.

It takes too long to prepare plant-based meals.

Someone else decides on most of the food I eat.

Dis	sagre	e	N	eutral		Ag	ree		Strong agree	lly
8 2	25			29			22		15	;
16		28			34				15	9
26			25			31			13	5
16		20		36			21		7	
16		23		3	33			19		10
13	19			28			24		15	
18		25			35				16	7
16		26			30			20		9
10	18		35				28			9
18		25			30			21		7
14	2	7			32			19	I	9
12	17		31				24		16	
17		27			35				15	6
36				21		2	25		14	4
6 ingle ch	oice	25%	6		50	%		75%		100



Please indicate how much you disagree or agree with each of the following statements with regards to barriers towards eating new plant-based food products and following a plant-based diet? (2/2)

German consumers say that plant-based food products are too expensive and that they need more information about it.

Strongly disagree	Disa	gree	Neutral	Agree	Strongly agree
The plant-based foods I would need are not available where I shop or eat out.	17	29	32		17 5
l don't know how to prepare plant-based meals.	20	25	27	22	7
There is not enough iron in plant-based food products.	11	25	38	19	7
There is not enough protein in plant-based food products.	15	25	34	19	7
I would be worried about my health (other than iron and protein) if I was only eating plant-based food products.	16	23	30	22	10
I would get indigestion, bloating gas, or flatulence when eating plant-based food products.	^{],} 17	19	40		16 7
Plant-based meals or snacks are not available when I eat out	92	1	38	26	7
Plant-based food products are too expensive.	6 12	28	34		21
I need more information about plant-based food products.	14	20	29	28	10
l do not enjoy eating plant-based food products.	13	19	31	21	17
It is not masculine to eat plant-based food products.	35		25	26	10 5
Plant-based food products do not look appetizing or appealing.	18	25	29	18	9
	0% Single choic	25% ce	50%	75%	100%



Please indicate how much you disagree or agree with each of the following statements concerning your assumptions about meat or plant protein?

Strongly disagree

I intend reducing my meat consumption in the coming months.

I am considering eating meat only very rarely (no more than once a week).

I feel able to reduce my meat consumption in the coming months.

It is harder to prepare good plant-based foods than conventional meat-based ones.

A complete meal is a meal with meat.

I choose food which has been produced in a way that minimises cruelty to animals.

I don't really think much about the animal when I buy meat.

To help reduce the impact of climate change, it is better to eat less animal foods.

Substituting an animal-based burger with a plant-based burger helps to slow down climate change.

Meat is nutritionally necessary for humans.

Consuming high amounts of meat might cause serious health problems.

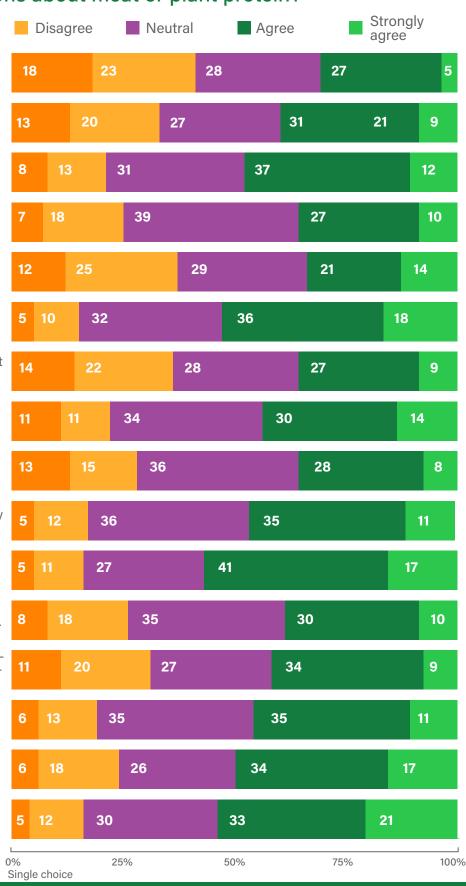
People around me often say that reducing your meat consumption is better for your health.

There are more and more people around me who are reducing their meat consumption.

I would reduce my meat consumption if my doctor recommended that I should do so.

Eating meat at every meal is expensive.

Plant-based meat is too expensive.

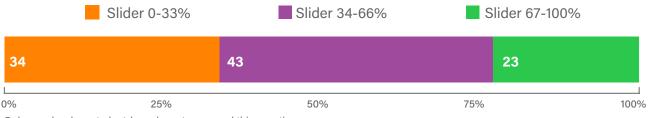






Q11 To what extent do you eat plant-based meat products (e. g. plant-based burger patties/nuggets) instead of conventional meat products?

More and more German consumers eat plant-based meat products instead of conventional meat products.

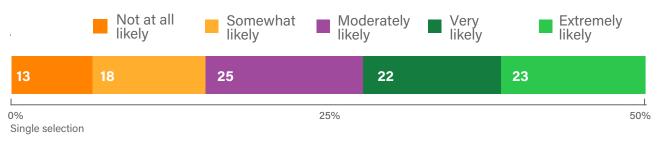


Only people who eat plant-based meat answered this question.

Slider: 0% (I always eat conventional cheese products) - 100% (I always eat plant-based cheese products)

Imagine that plant-based meat has become widely available, tasty and affordable at grocery stores, restaurants, butchers, and markets. How likely are you to try plant-based meat?

45% of German consumers are likely to try plant-based meat.





Q12

Q13 Imagine that you've had the opportunity to try a plantbased meat that has the identical taste and texture as animal-based meat.



Somewhat likely Moderately likely

Very

likelv



a How likely are you to eat plant-based meat instead of animalbased meat?

33% of German people are likely to eat plant-based instead of animal-based.

13	18	27	24	19
L0%			25%	50%
Single selection				

D How likely are you to purchase plant-based meat regularly?

41% of German people are likely to purchase plant-based meat regularly.

16	17	27		23	18	
0%			25%			50%

Single selection

C How likely are you to pay a higher price for plant-based than for animal-based meat?

26% of German people are likely to pay a higher price for plant-based than for animal-based meat.

24	20	29	17	9
0%		25%		50%
0 /0		2370		5





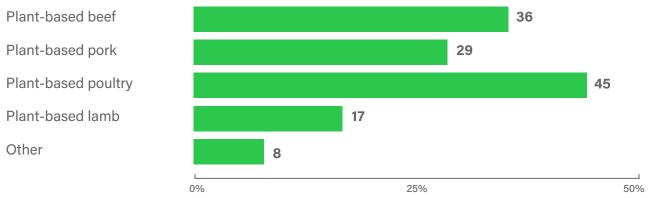


40%

Q14

What kind of plant-based meat do you wish you could buy in the supermarket? Please select all the options that apply.

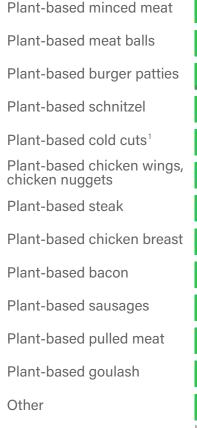
German consumers show a high demand for plant-based poultry products.

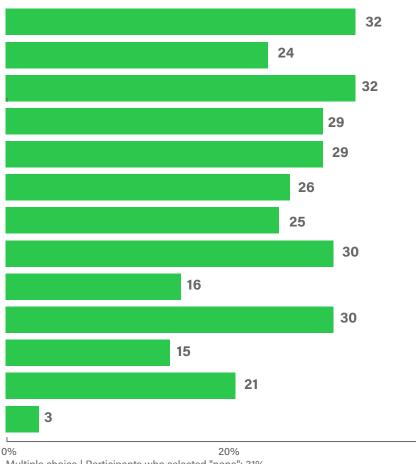


Multiple choice | Participants who selected "none": 31%

Q15 Specifically, what kind of plant-based meat products do you wish you could buy in the supermarket? Please select all the options that apply.

German consumers wish to buy plant-based minced meat, burger patties, chicken breasts, and sausages.



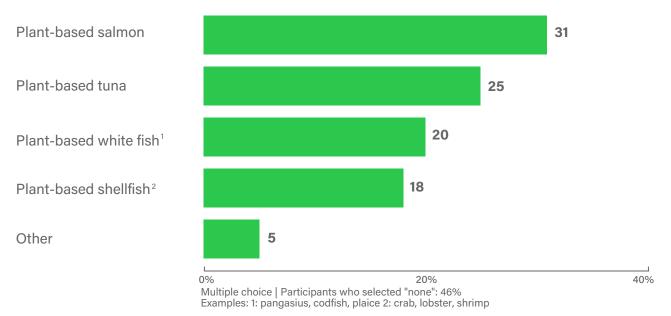


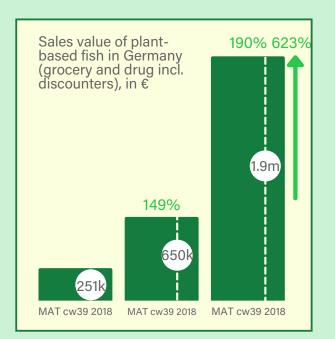
Multiple choice | Participants who selected "none": 31% Examples: 1: salami, ham



Q16 What kind of plant-based fish do you wish you could buy in the supermarket? Please select all the options that apply

In Germany, plant-based salmon is by far the most asked-for plant-based fish alternative.





Plant-based fish

Although sales volumes are still low, plant-based fish is the fastestgrowing food category in Germany which means that the sector has huge potential.

Sales in Germany experienced a tremendous increase, with a growth rate of 623% over the two periods and a sales value of €1.9m in the 2020 period.

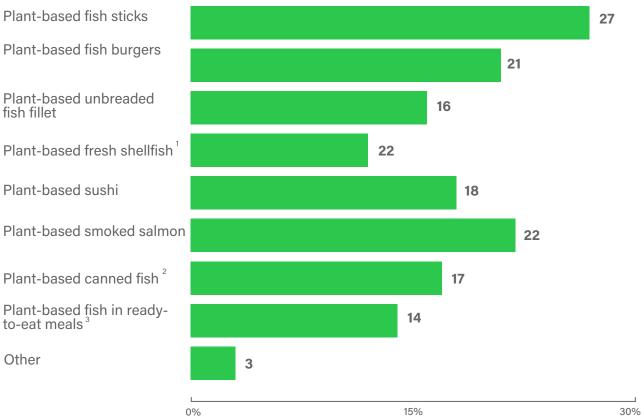
During the second period, plantbased fish arrived on the shelves of discount stores, quickly generating 13% of total sales (€241k).





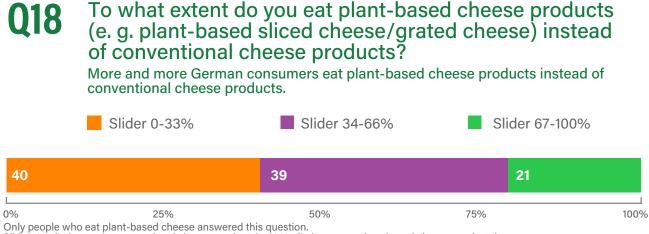
Q17 Specifically, what kind of plant-based fish products do you wish you could buy in the supermarket? Please select all the options that apply.

German consumers would like to see plant-based fish sticks, fish burgers, and smoked salmon in supermarkets.



Multiple choice | Participants who selected "none": 47% Examples: 1: lobster, scallop, shrimp 2: canned tuna 3: pasta with clams



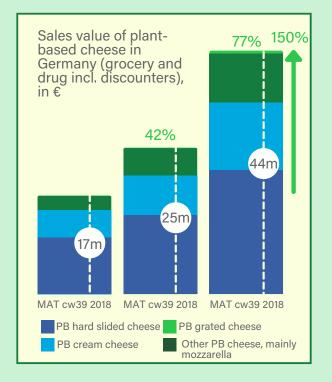


Slider: 0% (I always eat conventional cheese products) - 100% (I always eat plant-based cheese products)

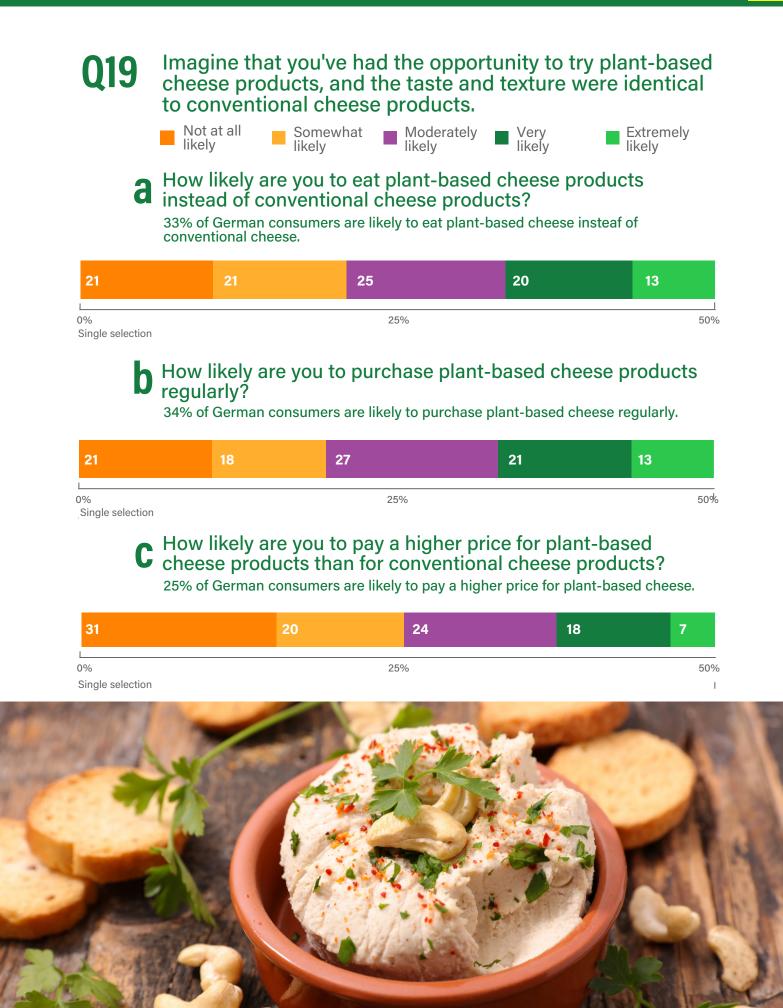
Plant-based cheese

Plant-based cheese showed strong doubledigit growth over the two periods, with sales value increasing from €17m to €44m and sales volume growing from 941k kg to 2.4m kg. The most sales were made with plant-based hard sliced cheese, followed by plant-based cream cheese and plant-based grated cheese. The category "other" experienced by far the strongest growth over the two periods, although it is still very small.

Only 6% of sales value and 7% of sales volume were made in discount stores over the last period. In MAT cw39 2018, just €5k's worth of plant-based cheese was sold in discount stores. However, sales increased tremendously in such stores so that €2.7m came from this channel in the last period, when categories other than plant-based hard sliced cheese entered discount stores for the first time.









32

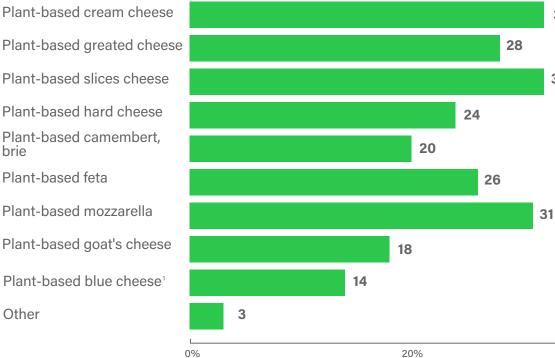
32

40%

Q20

What kind of plant-based cheese products do you wish you could buy in the supermarket? Please select all the options that apply.

German consumers show high demand for plant-based cream cheese, sliced cheese, and mozzarella.



Multiple choice | Participants who selected "none": 36% Examples: 1: gorgonzola, roquefort







Q21 To what extent do you eat vegan baked goods (e. g. bread or cookies made without eggs or butter) instead of conventional baked goods?

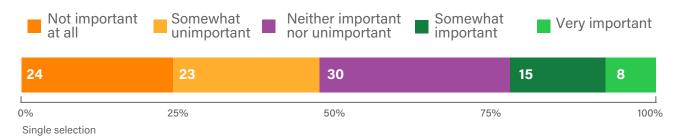
More and more German consumers eat vegan baked goods instead of conventional baked goods.

	43		21
25%	50%	75%	100%
	25% ased pastries/cakes/c	ased pastries/cakes/cookies answered this question.	25% 50% 75%

Slider: 0% (I always eat conventional baked goods) - 100% (I always eat vegan baked goods)

Q22 How important is it for you that baked goods (e. g. bread or cookies) exclude animal-based ingredients such as eggs or butter?

German consumer think baked goods should exclude animal-based ingredients.





Imagine that you've had the opportunity to try vegan Q23 baked goods (e.g. bread or cookies made without eggs or butter) with exactly the same taste and texture as conventional baked goods.



36% of Germans are likely to eat vegan instead of conventional baked goods.

17	19	28	24	12
L0%			25%	I 50%
Single selection				

n How likely are you to purchase vegan baked goods regularly? 35% of Germans are likely to purchase vegan baked goods regularly.

17	19	29	23	12
0% Single selection			25%	50

C How likely are you to pay a higher price for vegan baked goods instead of conventional baked goods?

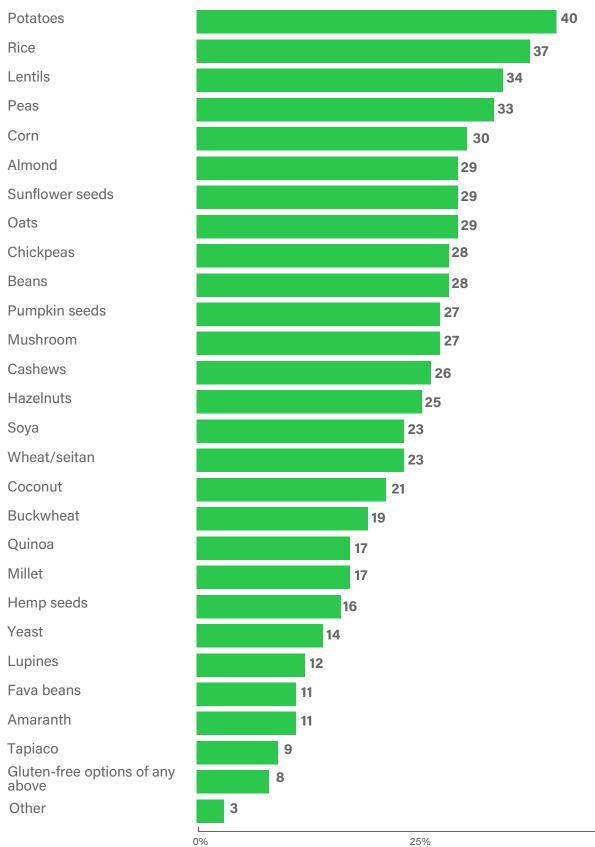
22% of Germans are likely to pay a higher price for vegan baked goods.

28	22	28	15	7
L 0% Single selection		25%		l 50%





Q24 Which of the following would you like to have as a main ingredient in plant-based food? Please select all that apply.



Multiple choice | Participants who selected "none": 17%

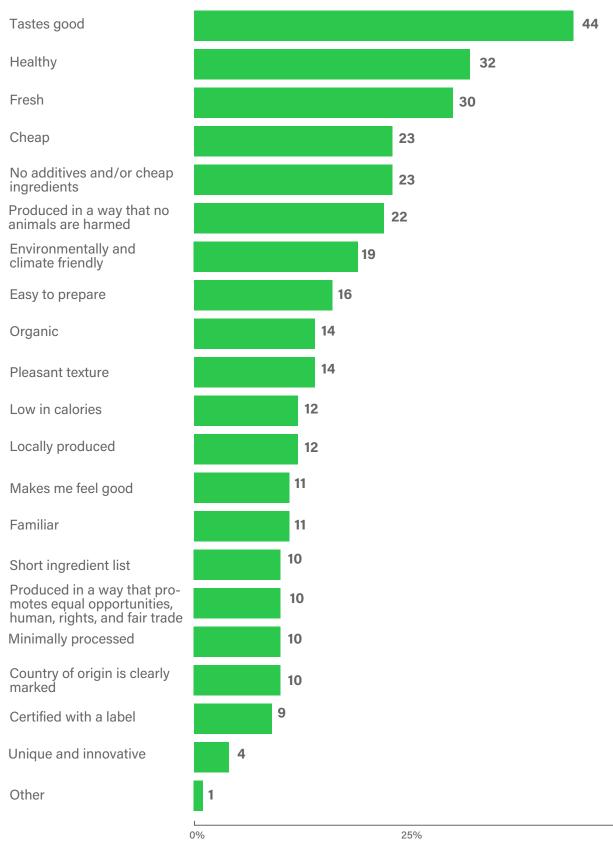
Q25 What factors are important for you when choosing a food product? It is important to me that the food product I choose...:

German consumers rate good taste and freshness as most important when choosing a food product.

	ewhat portant			importan nportant		newhat portant	V	ery important
Certified with a label	7	14	31			31		17
Unique and innovative	8	16	3	6		25		14
No additives and/or no artificial ingredients	26	23		39			30	
Minimally processed	49	38	3		38			21
Short ingredient list	37	29		3	8			22
Country of origin clearly marked	4 8	22		38			28	
Locally produced	39	28			41			20
Environmentally and climate friendly	57	26		3	7		2	4
Produced in a way that promotes equal opportunities human, rights, and fair trade	s, <mark>4</mark> 8	31			35			21
Tastes good	14 12	2	28		55			
Easy to prepare	4 6	23		43				25
Cheap	2 8	30			37			23
Healthy	<mark>2</mark> 4	19		38		37		
Low in calories	7	14	34			29		16
Familiar	38	27		3	9			22
Produced in a way that no animals are harmed	4 7	24		32			33	
Organic	7	10	28		36			19
Fresh	1413	3	36			46		
Pleasant texture	25	19		44			31	
Makes me feel good	35	22		42			28	
	0% Multiple	choice F	Participan	ts who select	25% ed "none": 13	3%		50



Q26 What are the most important factors when choosing a plant-based/vegan food product? Please select a maximum of five answers.



Multiple choice | Participants who selected "none": 13%





Q27 Please indicate how much you disagree or agree with each of the following statements with regards to trust towards foods based on plant protein (e. g. based on soy protein, pea protein etc.).

More than 50% of German consumers trust that plant-based protein food is accurately labelled and safe.

Strongly
disagree

I trust that a plant-based protein food is of high quality.

A plant-based protein food is reliable.

I trust that a plant-based protein food is safe.

I trust that plant-based protein food is fully traceable back to its origin.

I trust that plant-based protein food is authentic.

I trust that plant-based protein food is accurately labelled.

Plant-based protein food is trustworthy.

Plant-based protein food is honest.

Plant-based protein food is truthful.

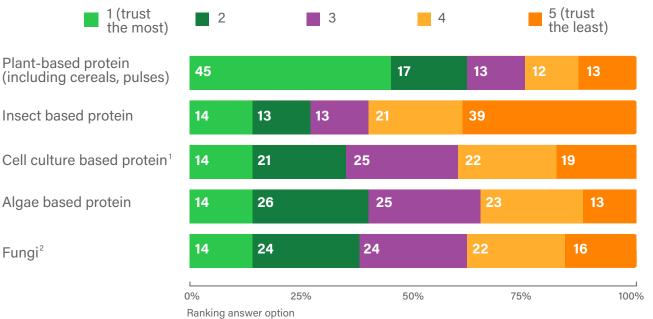
Plant-based protein food has integrity.

	Disag	Iree	Neutral	A	gree	Stror agree	ngly e
6	11	35		34	ļ		15
6	8	44			30		11
6	8	34		37			14
6	11	37			34		12
6	11	37		;	33		12
6	9	30		38		10	6
6 7	9 10	30 41		38	30	1(6 11
				38	30 28	10	
7	10	41		38			11
7	10 11	41 43		38	28	1	11 11



Q28 Which of the following alternative proteins do you trust the most? Rank them from 1 (trust the most) to 5 (trust the least).

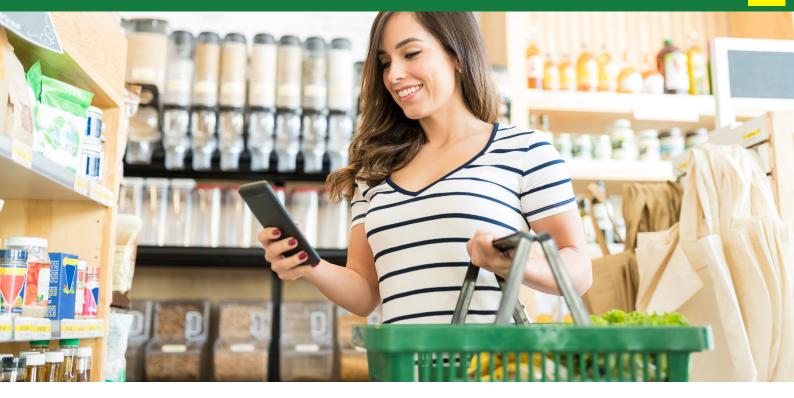
German consumers trust plant-based protein the most.



Examples: 1: Cultured meat, cultured dairy, etc. 2: Mushroom, mycelium yeast







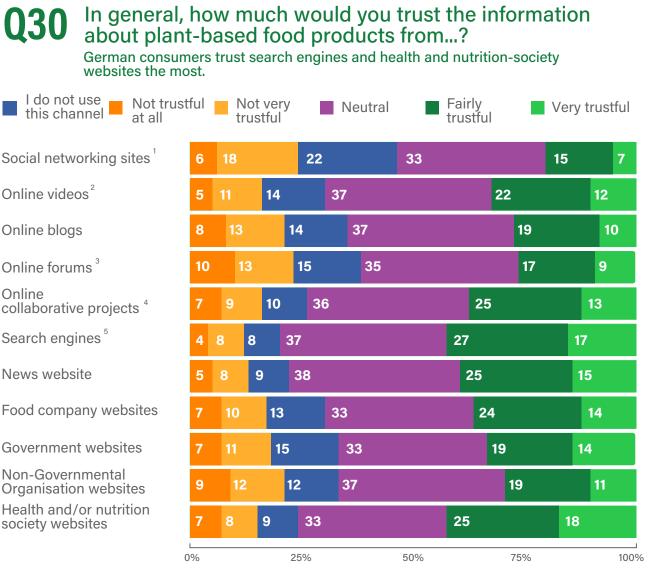
How likely would you be to use these online communication channels to find information about **Q29** plant-based food products?

international

German consumers are most likely to use search engines to look for information on plant-based food products.

Very unlikely	Unikely		Neutral	Lik		Very likely
Social networking sites ¹	33		17	24	18	8
Online videos ²	24	13	24		27	12
Online blogs	30		16	24	21	9
Online forums ³	33		16	27	18	6
Online collaborative projects⁴	24	15	27		25	10
Search engines⁵	16 7	23		34		21
News website	21	12	30		28	9
Food company websites	21	14	27		28	10
Government websites	30		21	25	16	8
Non-Governmental Organisation websites	28		19	28	19	6
Health and/or nutrition society websites	20	13	31		25	11
	0% Single selection	25%		50%	75%	ı 100%

Examples: 1: Facebook, Twitter, Instagram, Pinterst 2: Youtube 3: Reddit 4: Wikipedia 5: Google



Single selection

Examples: 1: Facebook, Twitter, Instagram, Pinterst 2: Youtube 3: Reddit 4: Wikipedia 5: Google





ABOUT PROVEG

ProVeg is an international food awareness organisation working to transform the global food system by replacing conventional animal-based products with plant-based and cultured alternatives.

ProVeg works with international decision-making bodies, governments, food producers, retailers, investors, the media, and the general public to help the world transition to a society and economy that are less dependent on animal agriculture and more sustainable for humans, animals, and the planet. As a leading NGO in the alternativeprotein space, we have no commercial agenda. This allows us to provide objective expert advice and help support you successfully and effectively by harnessing the power and profitability of the shift to plantbased eating, in the most appropriate way for your business.

We work with companies along the entire value chain, which gives us unique insights into the key challenges, hurdles, and opportunities at every stage of the journey as you take your product to market. a little bit of body text

INFORM YOUR PRODUCT DEVELOPMENT STRATEGY

EXPAND AND IMPROVE YOUR PRODUCT OFFERING

EFFECTIVELY POSITION YOUR PRODUCTS

BROADEN YOUR REACH

SUPPORT YOUR CSR ACTIVITIES



MARKET RESEARCH RESOURCES

- Smart Protein project (2021): Plant-based foods in Europe: How big is the market? The Smart Protein Plant-based Food Sector Report. European Union's Horizon 2020 research and innovation programme (No 862957). Available at <u>https://smartproteinproject.eu/plantbased-food-sector-report/</u> (last accessed 10.01.2022).
- Smart Protein project/ProVeg (2021): Plant-based foods in Europe: How big is the market? The Smart Protein Plant-based Food Sector Report. Webinar slides and recording. European Union's Horizon 2020 research and innovation programme (No 862957). Available at <u>https://proveg.com/what-we-do/corporate-engagement/plant-based-food-sector-report/</u> (last accessed 10.01.2022).

CONSUMER RESEARCH RESOURCES

- Smart Protein project (2021): What consumers want: A survey on European consumer attitudes towards plant-based foods. Country specific insights. European Union's Horizon 2020 research and innovation programme (No 862957). Available at <u>https://smartproteinproject.eu/consumer-attitudes-plant-based-food-report/</u> (last accessed 10.01.2022).
- Smart Protein project (2021): What consumers want: a survey on European consumer attitudes towards plant-based foods, with a focus on flexitarians. European Union's Horizon 2020 research and innovation programme (No 862957). Available at <u>https://smartproteinproject.eu/consumer-attitudes-plant-based-food-report/</u> (last accessed 10.01.2022).
- Smart Protein project/ProVeg (2021): What consumers want: a survey on European consumer attitudes towards plant-based foods, with a focus on flexitarians. Webinar slides and recording. European Union's Horizon 2020 research and innovation programme (No 862957). Available at <u>https://proveg.com/what-we-do/corporate-engagement/consumer-attitudesplant-based-food-report/</u> (last accessed 10.01.2022).

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