



PLANT-BASED FOOD IN POLAND

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 Poland 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 2020. 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 [here!](#)





ABOUT THE DATA



Smart Protein Plant-based Food Sector Report

This analysis is based on scanning data from Nielsen MarketTrack for Poland 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



Consumer profile

24% of Polish consumers identify as flexitarians, while 6% follow a plant-based diet (vegan+vegetarian).



Consumption of animal-based products

In terms of animal-based food, Polish consumers consume milk (32% daily) the most frequently, followed by cheese (24% daily) and yoghurt (23% daily). In terms of meat, poultry is the most consumed (60% at least once a week).



Consumption of plant-based products

Looking at plant-based food, plant-based milk (24% at least once a week), plant-based cheese (24% at least once a week), and plant-based yoghurt (23% at least once a week) are the most frequently consumed.



Plant-based meat and fish consumption

Polish consumers specifically wish they could buy plant-based burger patties (34%) and chicken breast (34%) in supermarkets. Polish consumers specifically wish they could buy plant-based smoked salmon (29%) and fish sticks (27%).



Plant-based dairy consumption

In terms of plant-based cheese, Polish consumers would especially like to see plant-based sliced cheese (38%) and plant-based mozzarella (36%) available in supermarkets.

Plant-based plain milk (€37m) accounts for almost 90% of plant-based milk sales (€43m). The remaining 10% come from plant-based flavoured milk (€5.7m).

The plant-based plain-milk sector is dominated by almond (€9.1m), followed by oat (€7.5m) and soya (€6.9m). The sector showed double-digit growth in sales value (76%) and even triple-digit growth in discounters (126%) over the past two periods.

The plant-based flavoured-milk sector is dominated by soya (€3.8m), followed by rice (€653k) and oat (€630m). Discount stores showed triple-digit growth over the past two periods.



Preferred ingredients for plant-based foods

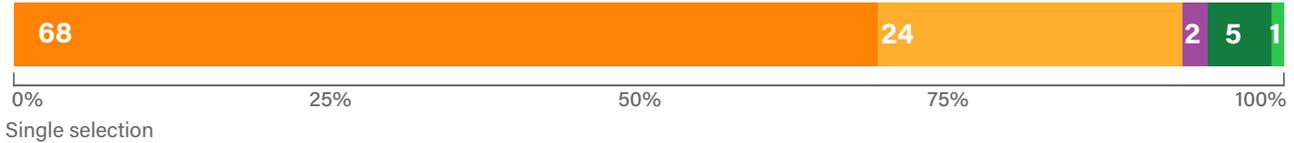
Potatoes, rice and beans are Polish consumers' favourite ingredients in plant-based foods: 45% are in favour of plant-based food products that include potatoes as a main ingredient, 40% prefer rice whereas 38% selected beans.



Q1 Which category best describes your current dietary lifestyle?

6% of Polish consumers are vegan and vegetarian. 24% (flexitarians) are reducing their meat consumption.

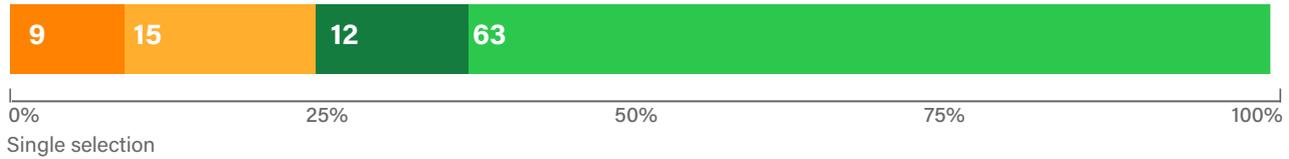
- **Omnivore**
 I frequently eat meat, such as beef, pork, chicken, turkey, fish and/or shellfish
- **Flexitarian**
 I sometimes eat meat, but I am trying to reduce my meat consumption and often choose plant-based foods instead
- **Pescetarian**
 I eat fish and/or shellfish, but no other types of meat
- **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



Q2 How long have you been following your current dietary lifestyle?

63% of consumers from the Poland have been following their current diet lifestyle for more than 5 years.

- **Less than six months**
- **6 months to 2 years**
- **2 to 5 years**
- **More than 5 years**

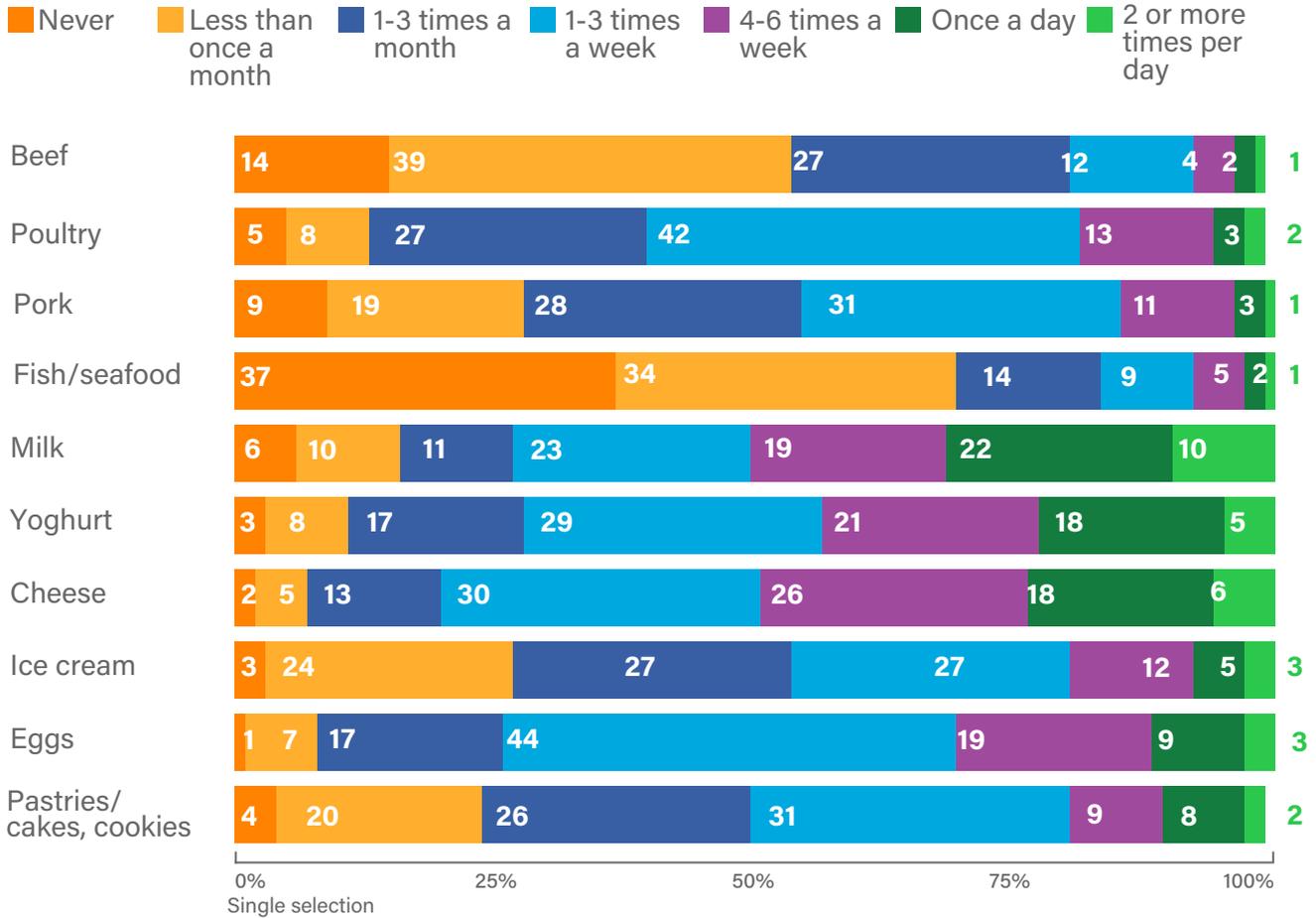




Q3

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

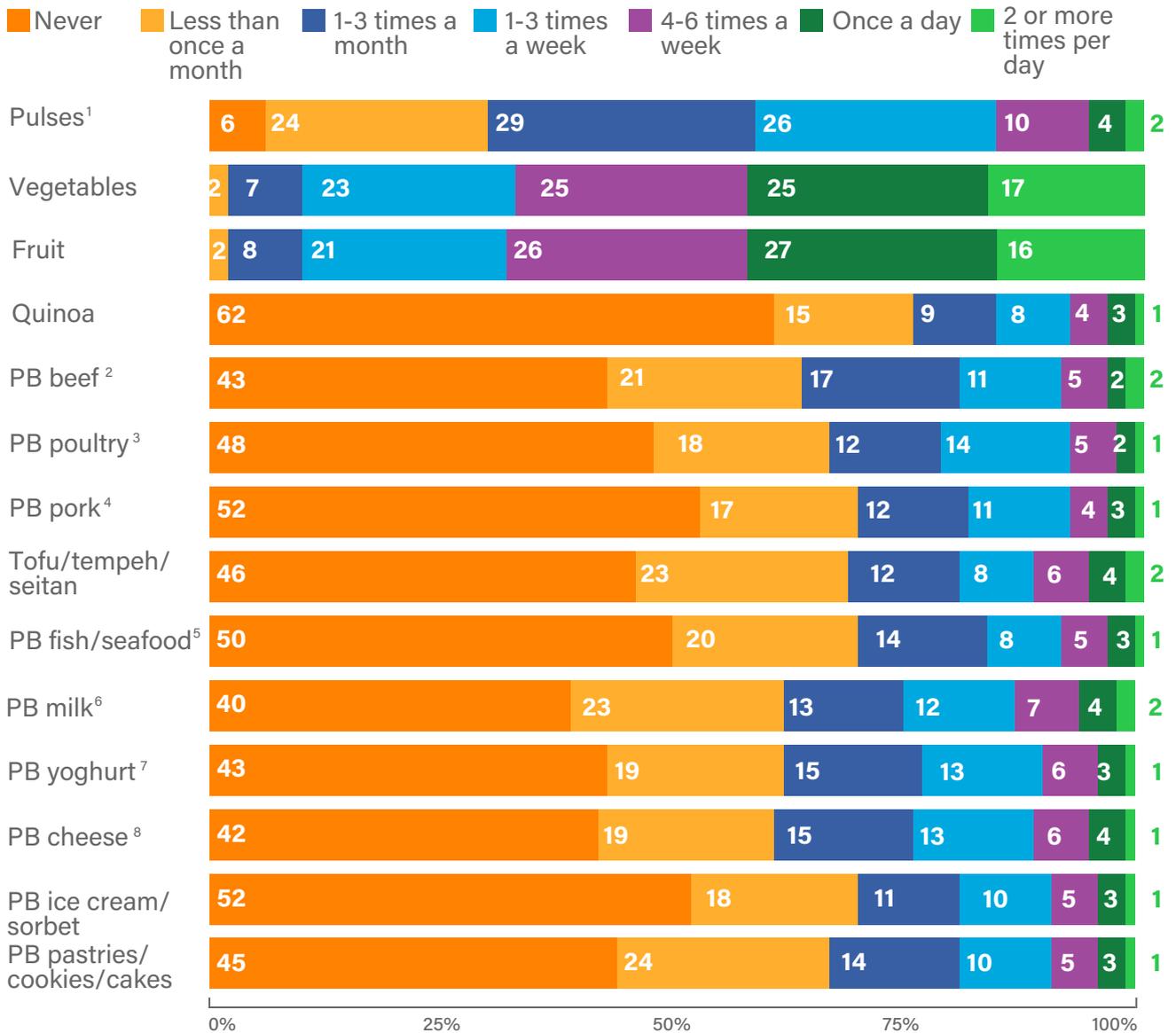
Polish consumers consume milk the most frequently, followed by cheese, yoghurt, and eggs.





Q3

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

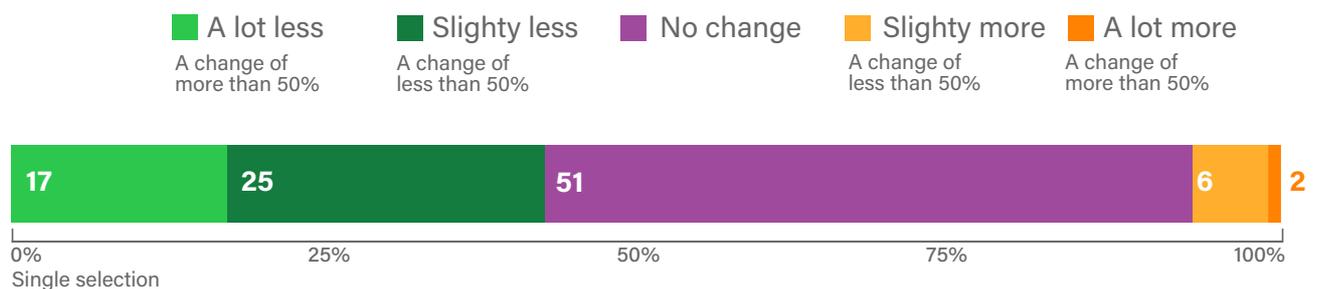


Single selection | PB = Plant-based | Examples: 1: lentils, beans 2: PB burger/mince 3: PB chicken strips/chunks 4: PB sausage/ pulled pork 5: PB fish sticks/fish burger/tuna 6: soya almond/oat/coconut/rice/pea milk 7: soya/almond/oat/ coconut yoghurt 8: PB cream cheese/cheese slices/grated cheese

Q4

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

42% of Polish consumers now eat less meat compared to a year ago.





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

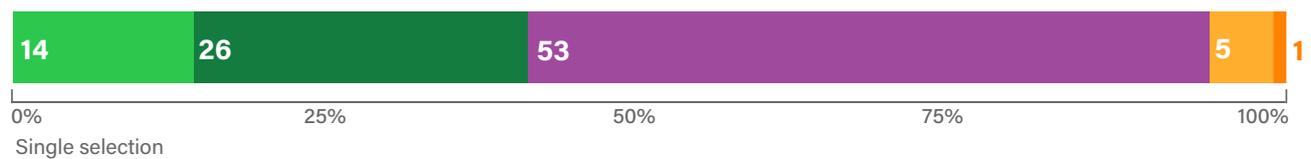
Nearly 30% of Polish consumers intend to reduce their dairy consumption in the next six months. 40% plan on consuming less meat.

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

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



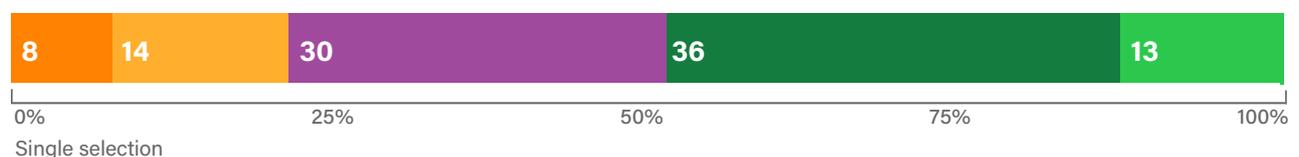
b Meat products (e. g. beef, pork, chicken)



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

49% of Polish consumers think an organic label is important when it comes to plant-based food products.

- Not important at all
- Somewhat unimportant
- Neither important nor unimportant
- Somewhat important
- Very important





Q7

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

26% of Polish consumers intend to consume more plant-based dairy products in the next six months.

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

a Plant-based dairy products (e. g. soya/oat milk, coconut yoghurt)



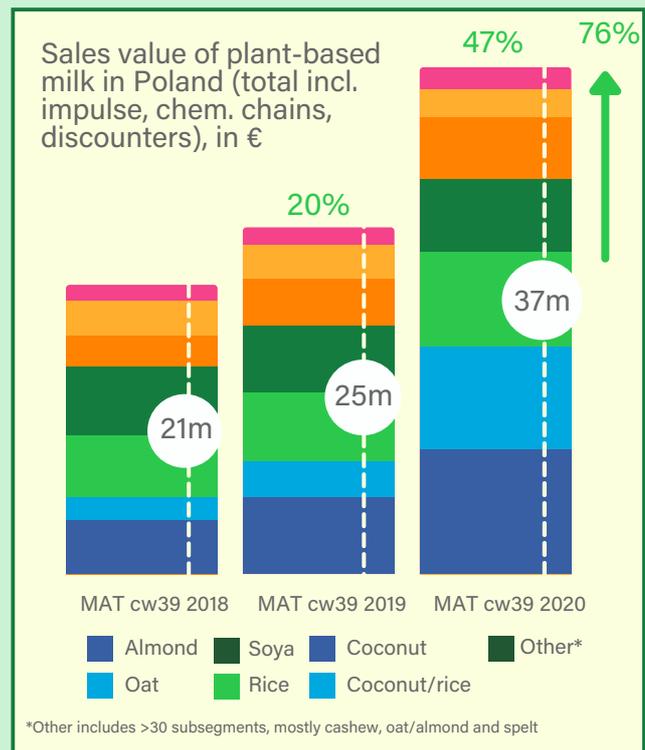
Plant-based dairy

The sales value of plant-based milk grew by 62% (€43m) over the past two periods, while sales volume increased by 75% (26m Kg/L).

Discount stores recorded even stronger growth, at 122% (€21m) and 126% (15m Kg/L) respectively.

Plant-based plain milk (€37m) accounts for almost 90% of plant-based milk sales (€43m). The remaining 10% come from plant-based flavoured milk (€5.7m).

The plant-based plain-milk sector is dominated by almond (€9.1m), followed by oat (€7.5m) and soya (€6.9m). The sector showed double-digit growth in sales value (76%) and even triple-digit growth in discounters (126%) over past two periods.



The plant-based flavoured-milk sector is dominated by soya (€3.8m), followed by rice (€653k) and oat (€630m). Discount stores showed triple-digit growth over the past two periods.

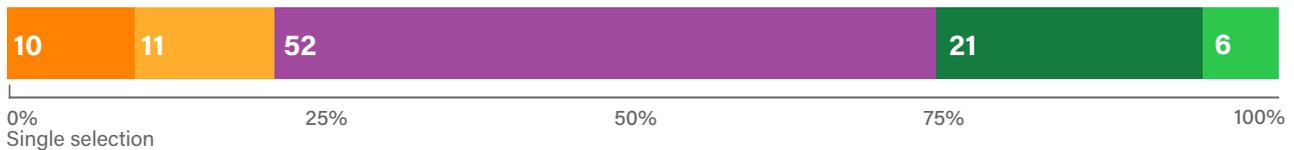


Q7 Do you intend increasing or reducing your consumption of the following plant-based food categories in the next six months?

27% of Polish consumers intend to consume more plant-based meat products in the next six months.

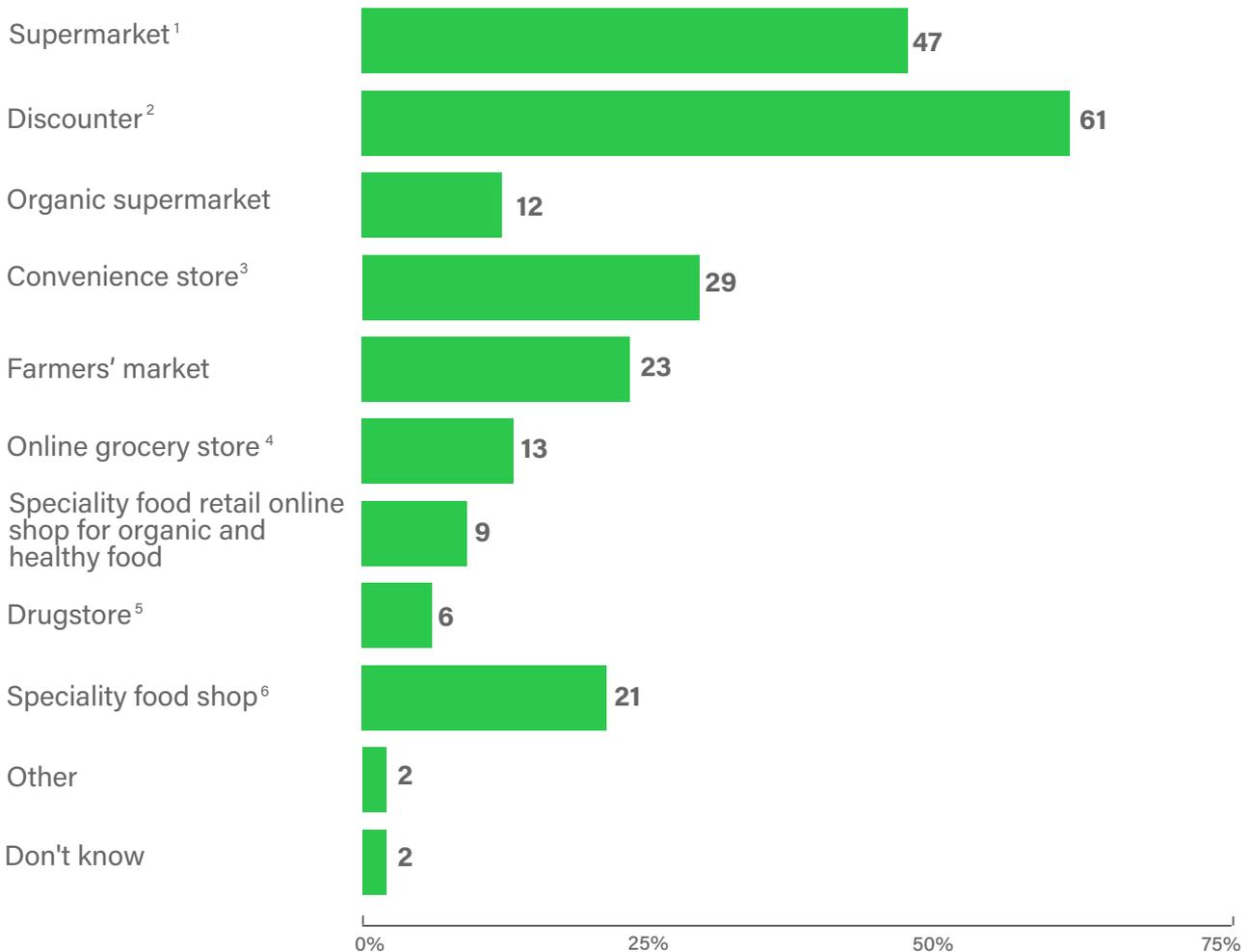
- I will consume less
- I will consume a little less
- I will consume about the same
- I will consume a little more
- I will consume a little more

b Plant-based meat products (e. g. plant-based burgers/sausages)



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

Polish consumers prefer supermarkets, discount stores, and online grocery stores for grocery shopping.



Multiple choice | Max. 3
 Examples: 1: Tesco 2: Aldi, Lidl 3: Co-op 4: Ocado 5: Boots, Superdrug 6: bakery

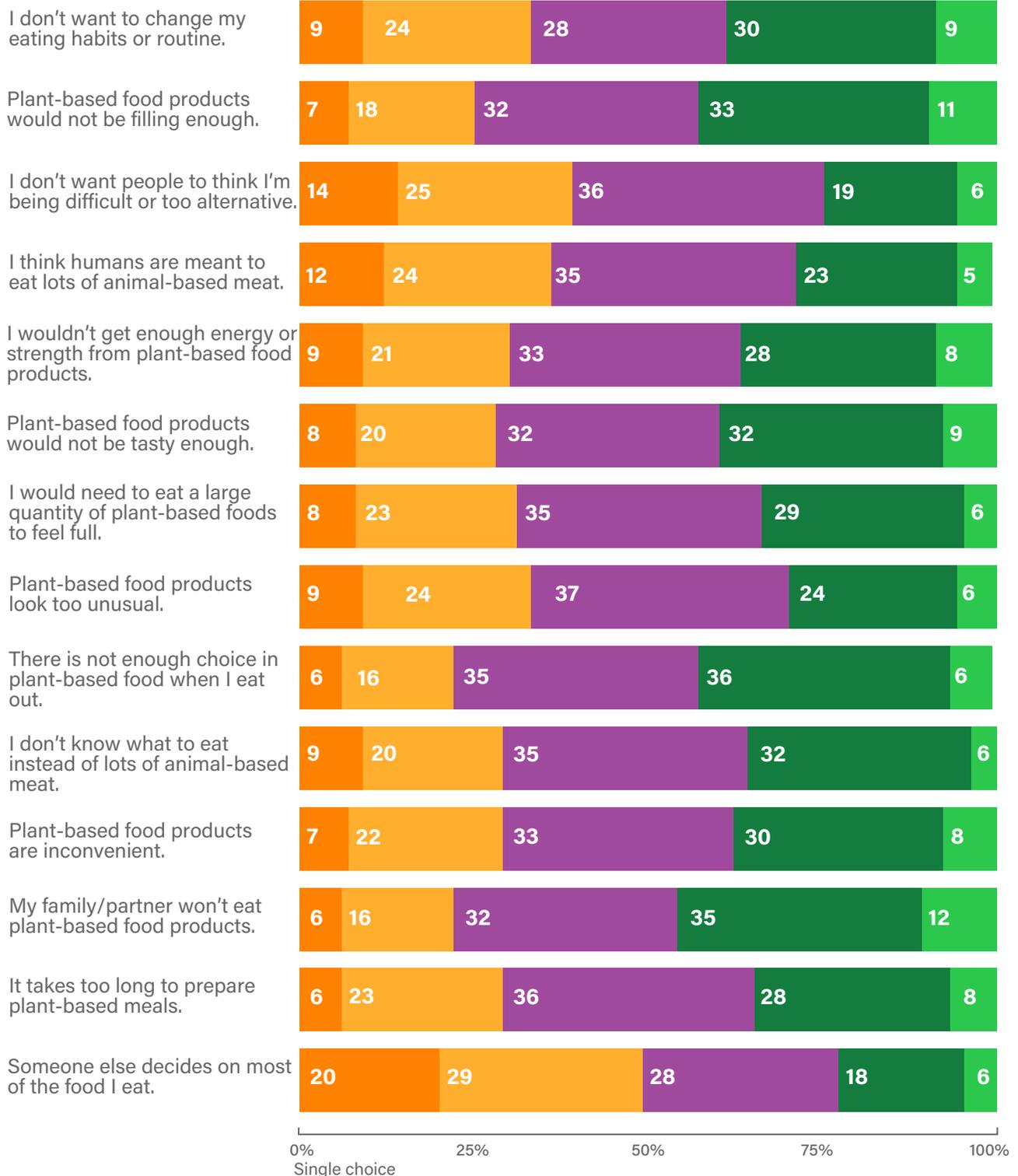


Q9

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 Polish consumers are that their family/partner won't eat it, lack of choice and that they won't be filling enough.

■ Strongly disagree
 ■ Disagree
 ■ Neutral
 ■ Agree
 ■ Strongly agree



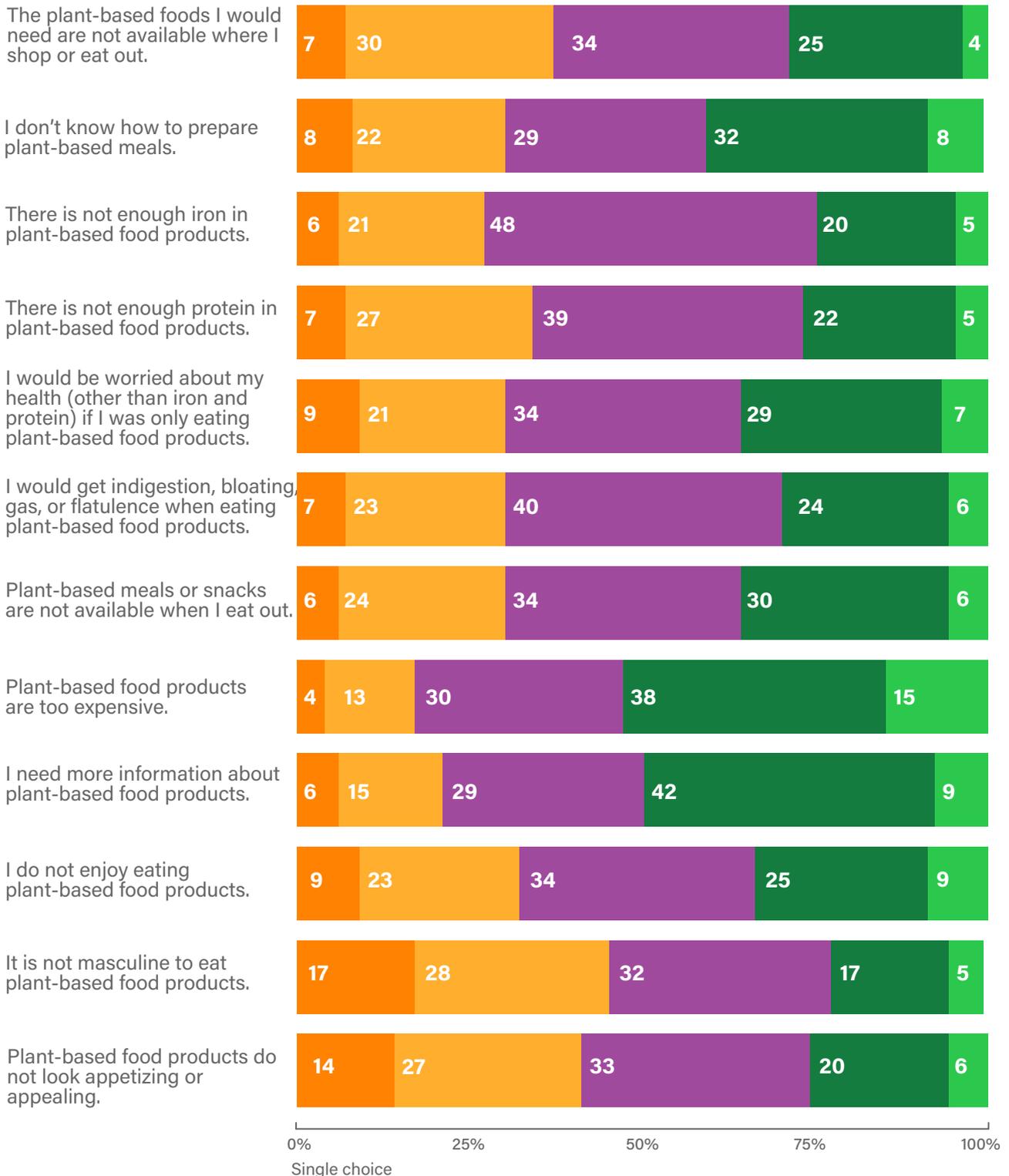


Q9

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)

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

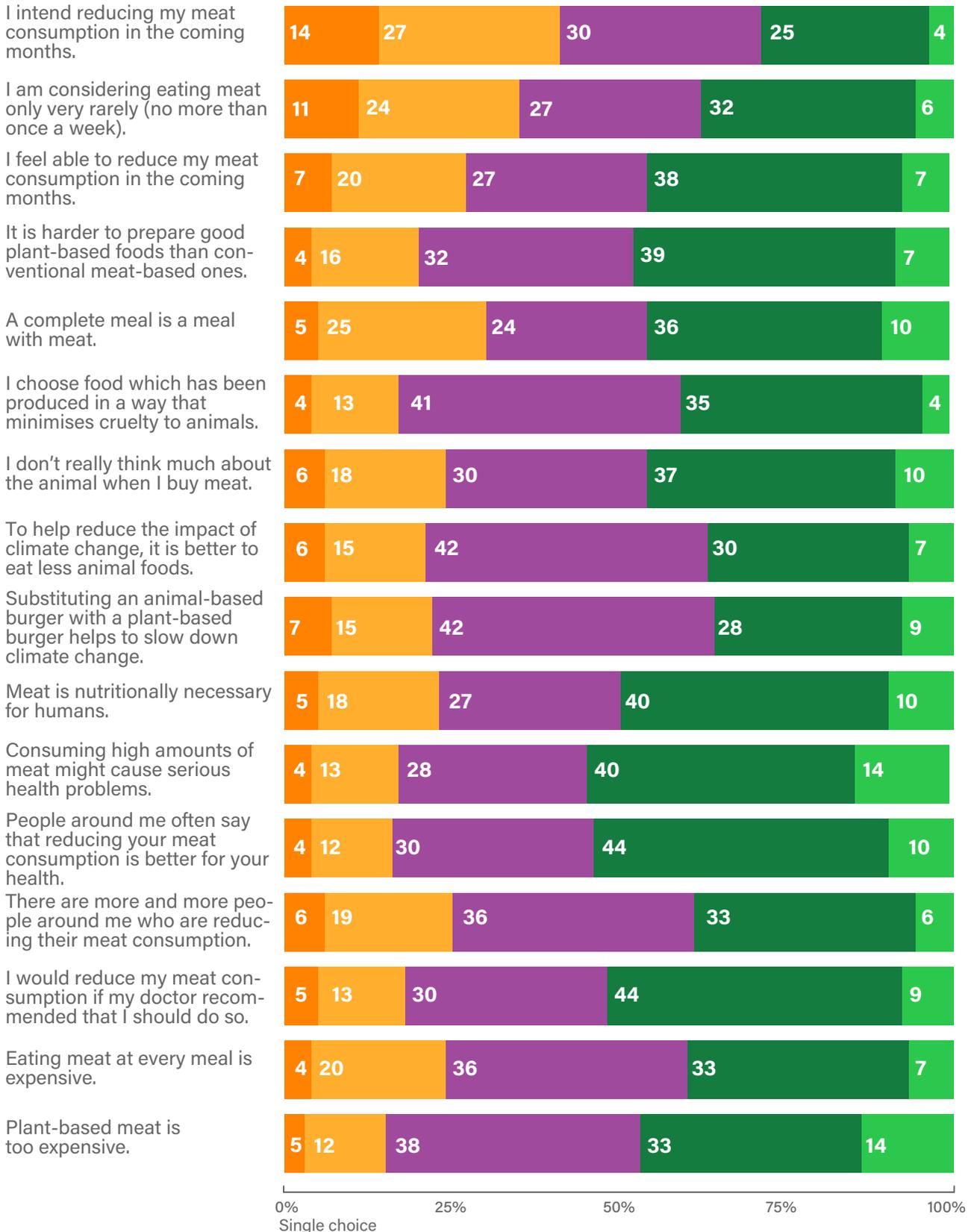
■ Strongly disagree
 ■ Disagree
 ■ Neutral
 ■ Agree
 ■ Strongly agree





Q10 Please indicate how much you disagree or agree with each of the following statements concerning your assumptions about meat or plant protein?

■ Strongly disagree
 ■ Disagree
 ■ Neutral
 ■ Agree
 ■ Strongly agree

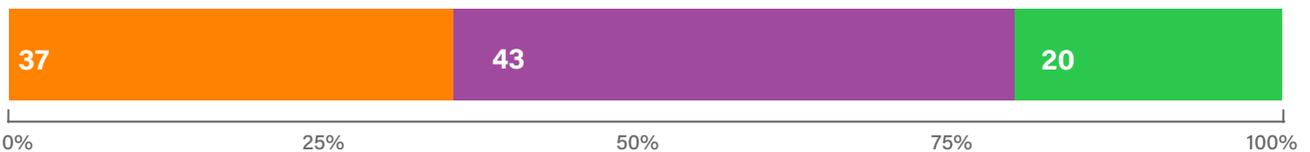




Q11 To what extent do you eat plant-based meat products (e. g. plant-based burger patties/nuggets) instead of conventional meat products?

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

■ Slider 0-33%
 ■ Slider 34-66%
 ■ Slider 67-100%

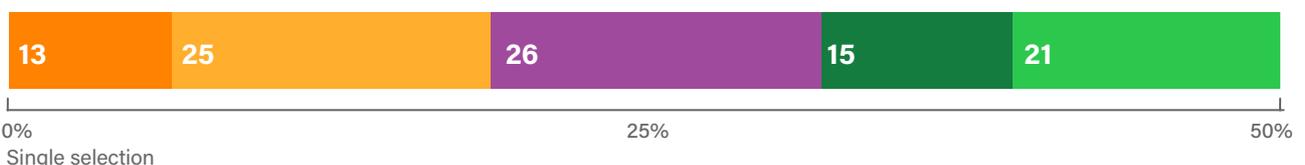


Only people who eat plant-based meat answered this question.
 Slider: 0% (I always eat conventional cheese products) - 100% (I always eat plant-based cheese products)

Q12 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?

36% of Polish consumers are likely to try plant-based meat.

■ Not at all likely
 ■ Somewhat likely
 ■ Moderately likely
 ■ Very likely
 ■ Extremely likely



0%
Single selection



Q13

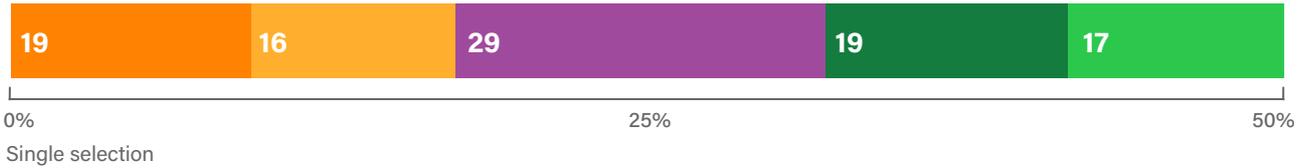
Imagine that you've had the opportunity to try a plant-based meat that has the identical taste and texture as animal-based meat.

■ Not at all likely
 ■ Somewhat likely
 ■ Moderately likely
 ■ Very likely
 ■ Extremely likely

a

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

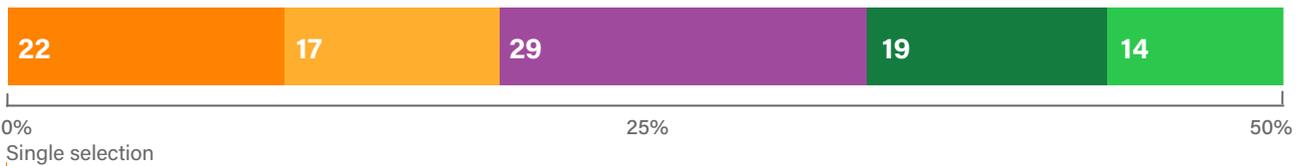
36% of Polish consumers are likely to eat plant-based instead of animal-based.



b

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

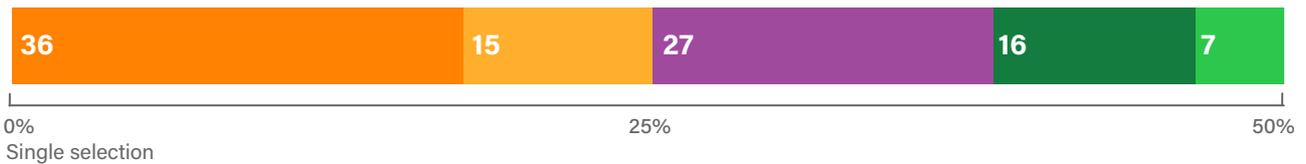
33% of Polish consumers are likely to purchase plant-based meat regularly.



c

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

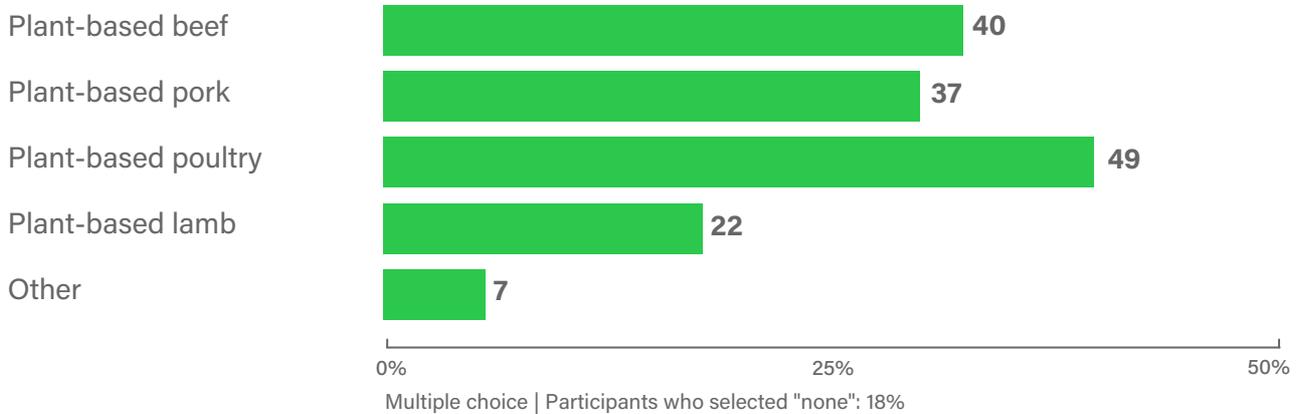
23% of Polish consumers are likely to pay a higher price for plant-based than for animal-based meat.





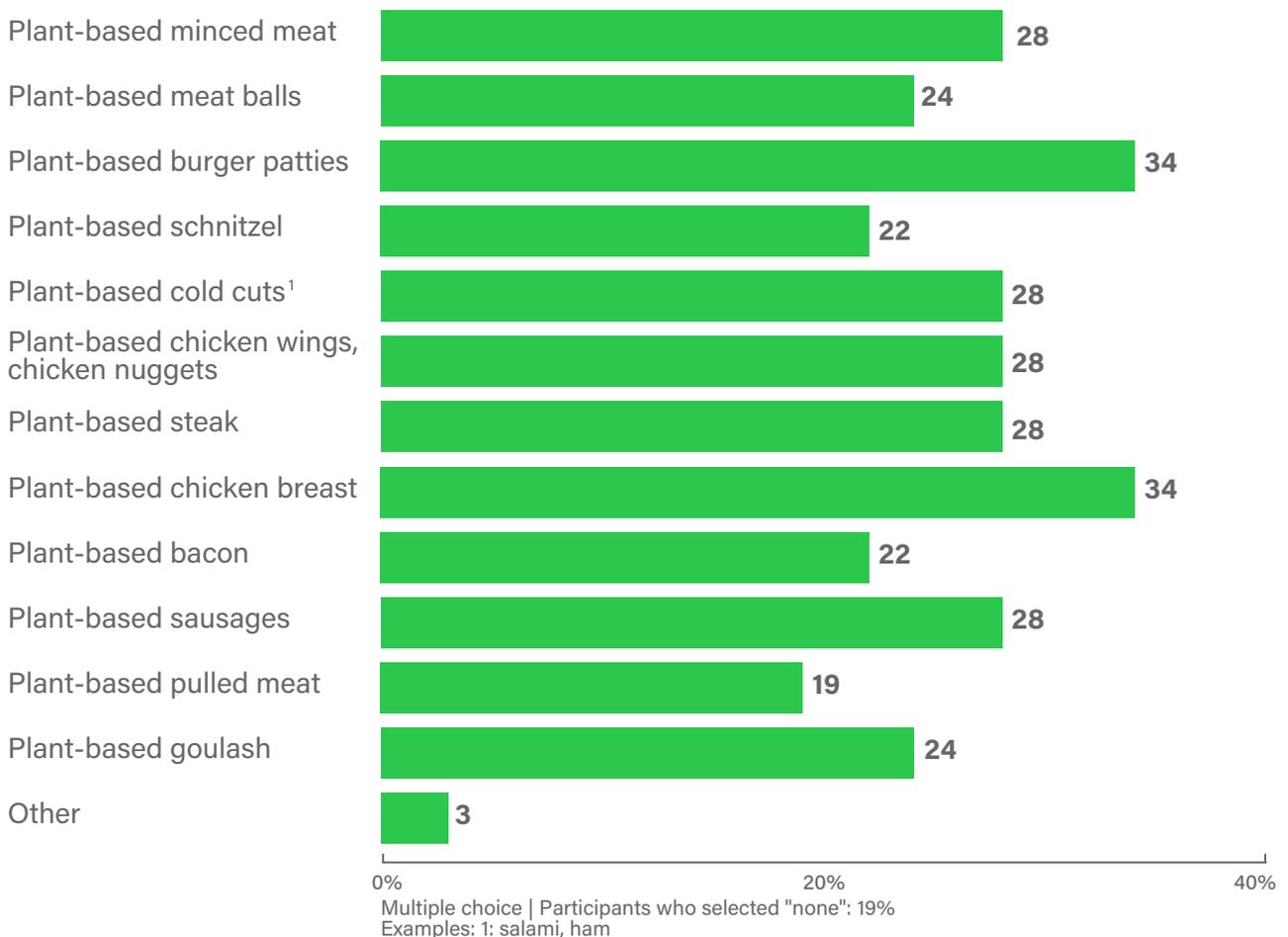
Q14 What kind of plant-based meat do you wish you could buy in the supermarket? Please select all the options that apply.

Polish consumers show a high demand for plant-based poultry and beef products.



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.

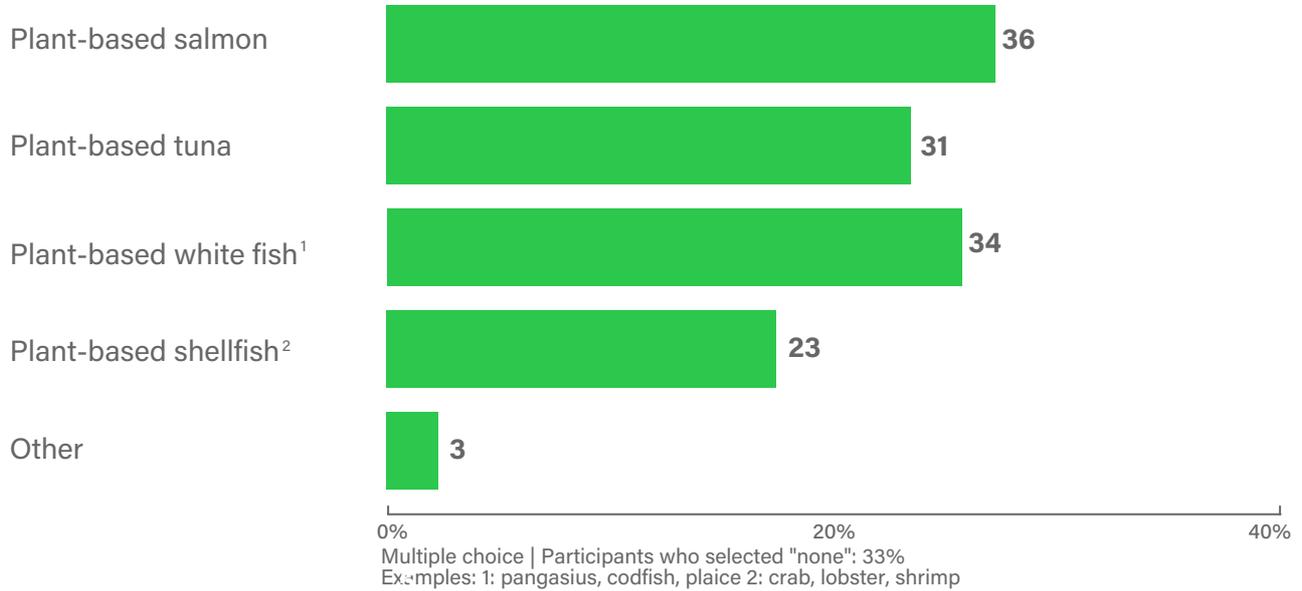
Polish consumers wish to buy plant-based chicken breast and burger patties.





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

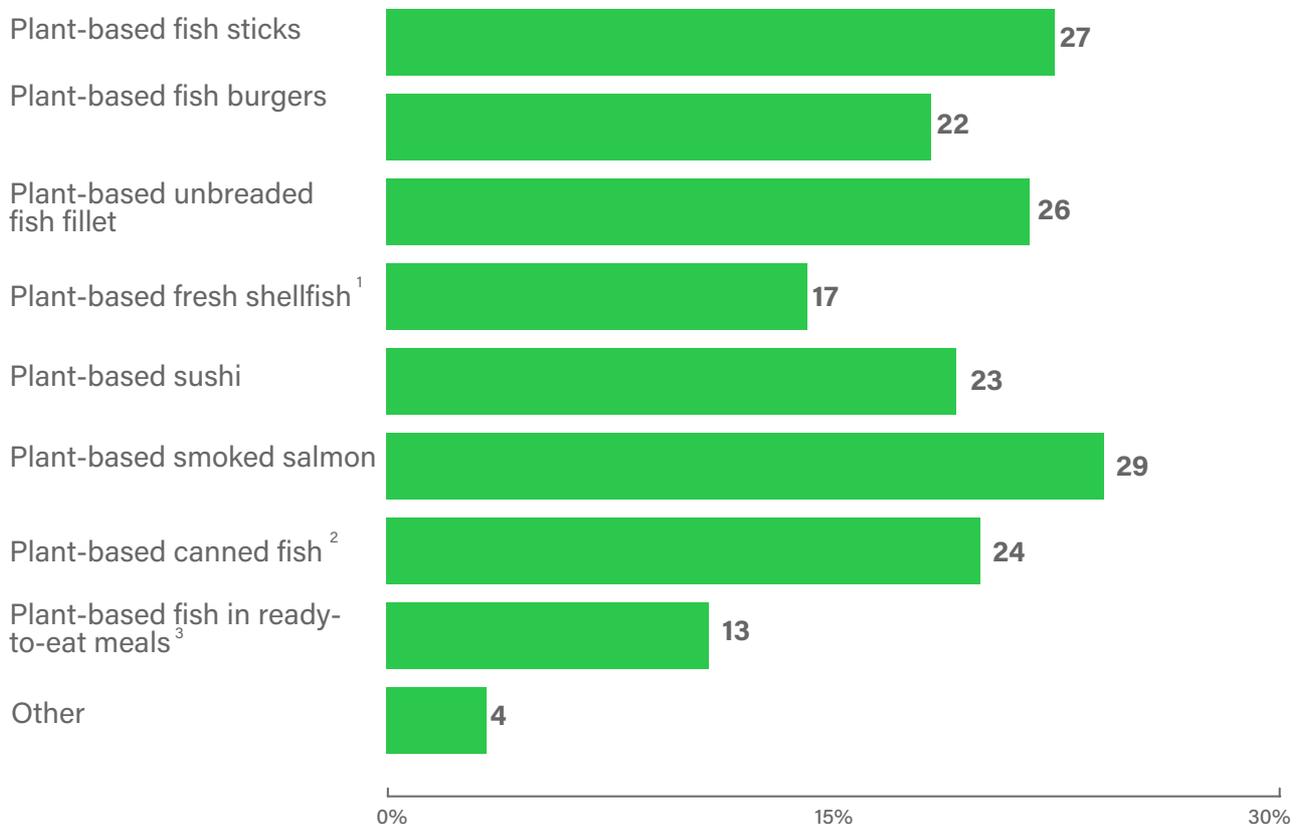
In Poland, plant-based salmon is the most asked-for plant-based fish alternative.





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.

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



Multiple choice | Participants who selected "none": 30%

Examples: 1: lobster, scallop, shrimp 2: canned tuna 3: pasta with clams



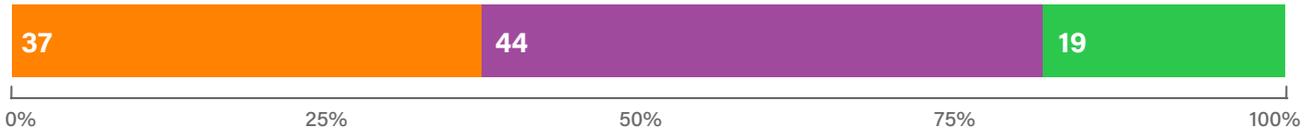
Q18 To what extent do you eat plant-based cheese products (e. g. plant-based sliced cheese/grated cheese) instead of conventional cheese products?

More and more Polish consumers eat plant-based cheese products instead of conventional cheese products.

Slider 0-33%

Slider 34-66%

Slider 67-100%



0% 25% 50% 75% 100%
 Only people who eat plant-based cheese answered this question.
 Slider: 0% (I always eat conventional cheese products) - 100% (I always eat plant-based cheese products)



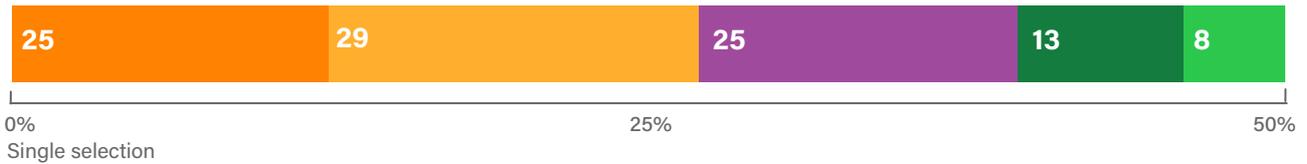


Q19 Imagine that you've had the opportunity to try plant-based cheese products, and the taste and texture were identical to conventional cheese products.

■ Not at all likely
 ■ Somewhat likely
 ■ Moderately likely
 ■ Very likely
 ■ Extremely likely

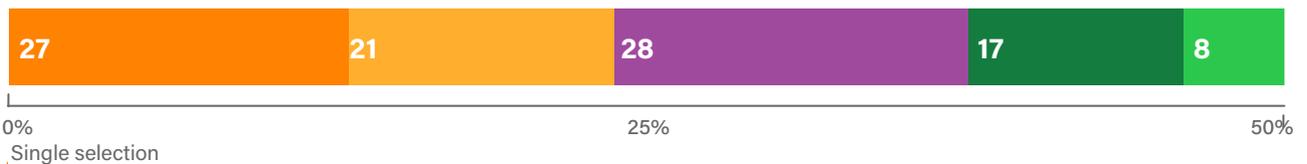
a How likely are you to eat plant-based cheese products instead of conventional cheese products?

21% of Polish consumers are likely to eat plant-based cheese instead of conventional cheese.



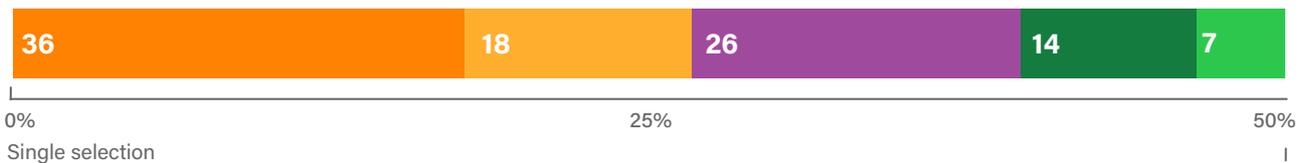
b How likely are you to purchase plant-based cheese products regularly?

25% of Polish consumers are likely to purchase plant-based cheese regularly.



c How likely are you to pay a higher price for plant-based cheese products than for conventional cheese products?

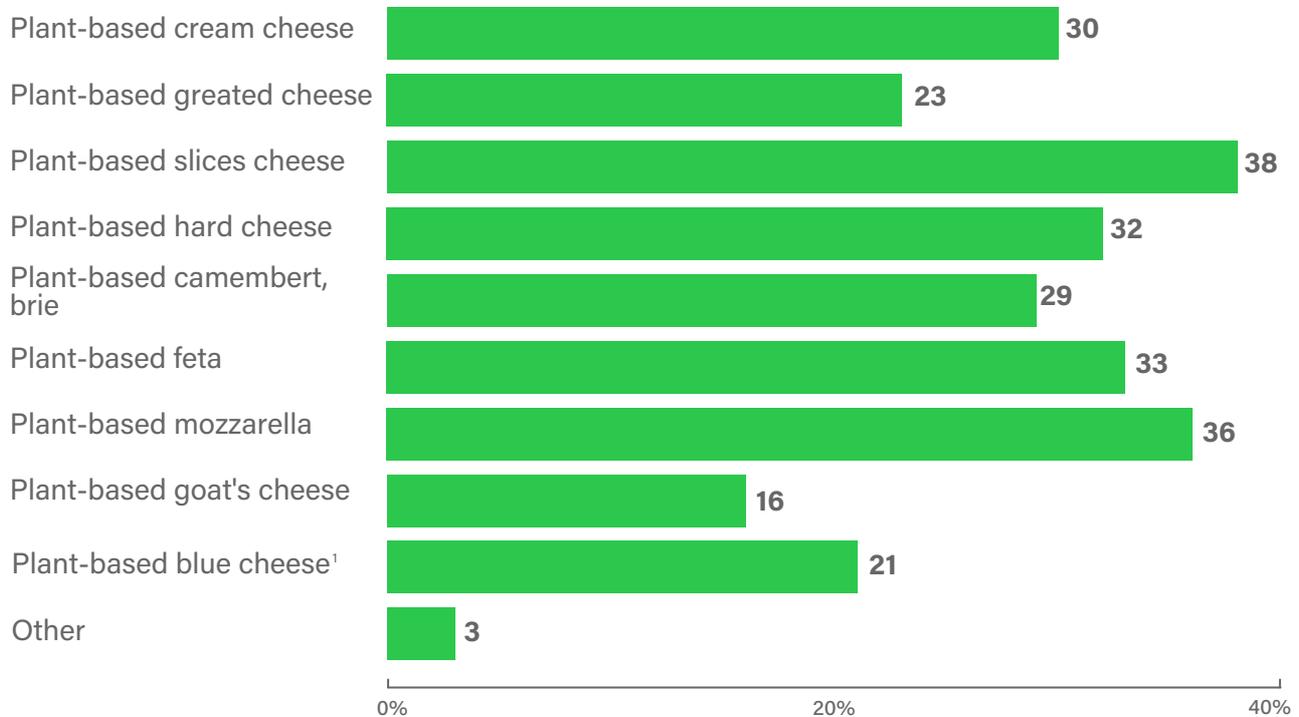
21% of Polish consumers are likely to pay a higher price for plant-based cheese.





Q20 What kind of plant-based cheese products do you wish you could buy in the supermarket? Please select all the options that apply.

Polish consumers show high demand for plant-based sliced cheese, mozzarella and feta.



0% 20% 40%
Multiple choice | Participants who selected "none": 24%
Examples: 1: gorgonzola, roquefort

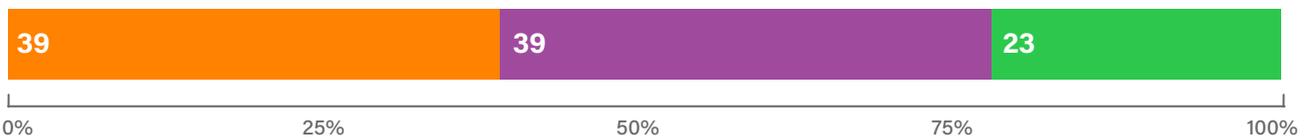




Q21 To what extent do you eat vegan baked goods (e. g. bread or cookies made without eggs or butter) instead of conventional baked goods?

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

■ Slider 0-33%
 ■ Slider 34-66%
 ■ Slider 67-100%

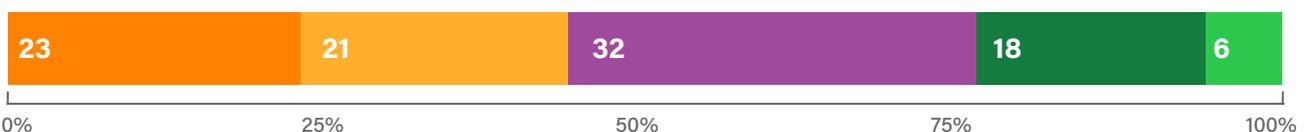


0% 25% 50% 75% 100%
 Only people who eat plant-based pastries/cakes/cookies answered this question.
 Slider: 0% (I always eat conventional baked goods) - 100% (I always eat vegan baked goods)

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

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

■ Not important at all
 ■ Somewhat unimportant
 ■ Neither important nor unimportant
 ■ Somewhat important
 ■ Very important



0% 25% 50% 75% 100%
 Single selection



Q23

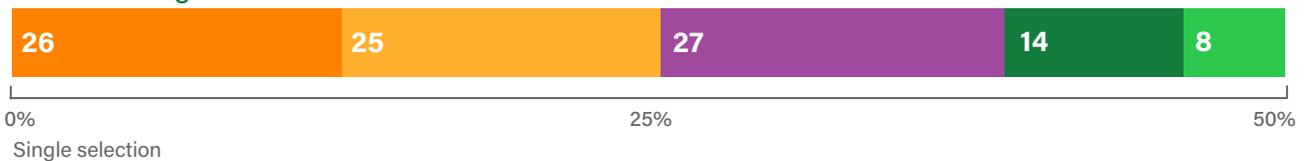
Imagine that you've had the opportunity to try vegan baked goods (e. g. bread or cookies made without eggs or butter) with exactly the same taste and texture as conventional baked goods.

■ Not at all likely
 ■ Somewhat likely
 ■ Moderately likely
 ■ Very likely
 ■ Extremely likely

a

How likely are you to eat vegan baked goods instead of conventional baked goods?

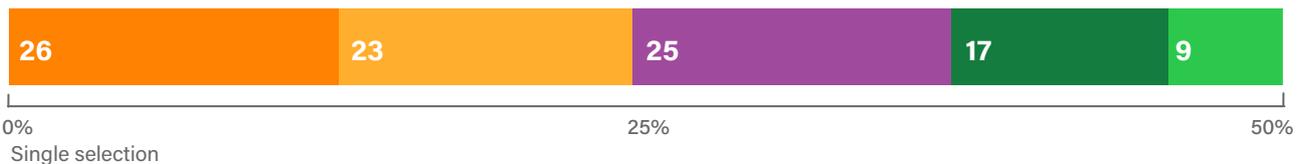
22% of Polish consumers are likely to eat vegan instead of conventional baked goods.



b

How likely are you to purchase vegan baked goods regularly?

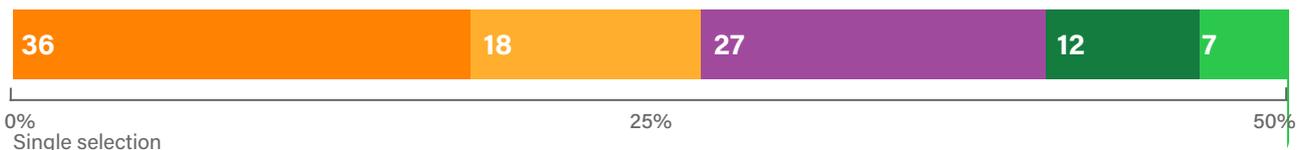
26% of Polish consumers are likely to purchase vegan baked goods regularly.



c

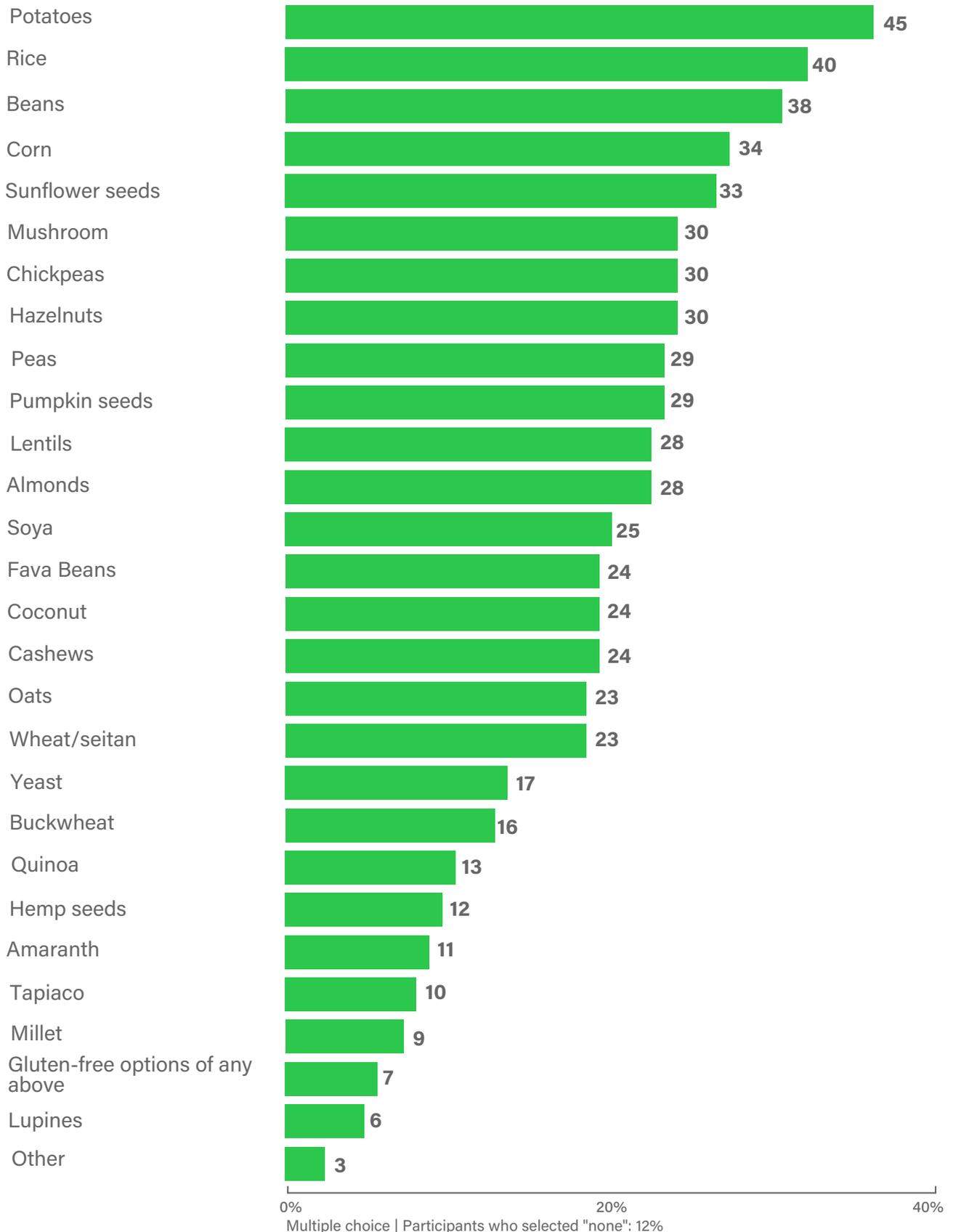
How likely are you to pay a higher price for vegan baked goods instead of conventional baked goods?

19% of Polish consumers are likely to pay a higher price for vegan baked goods.





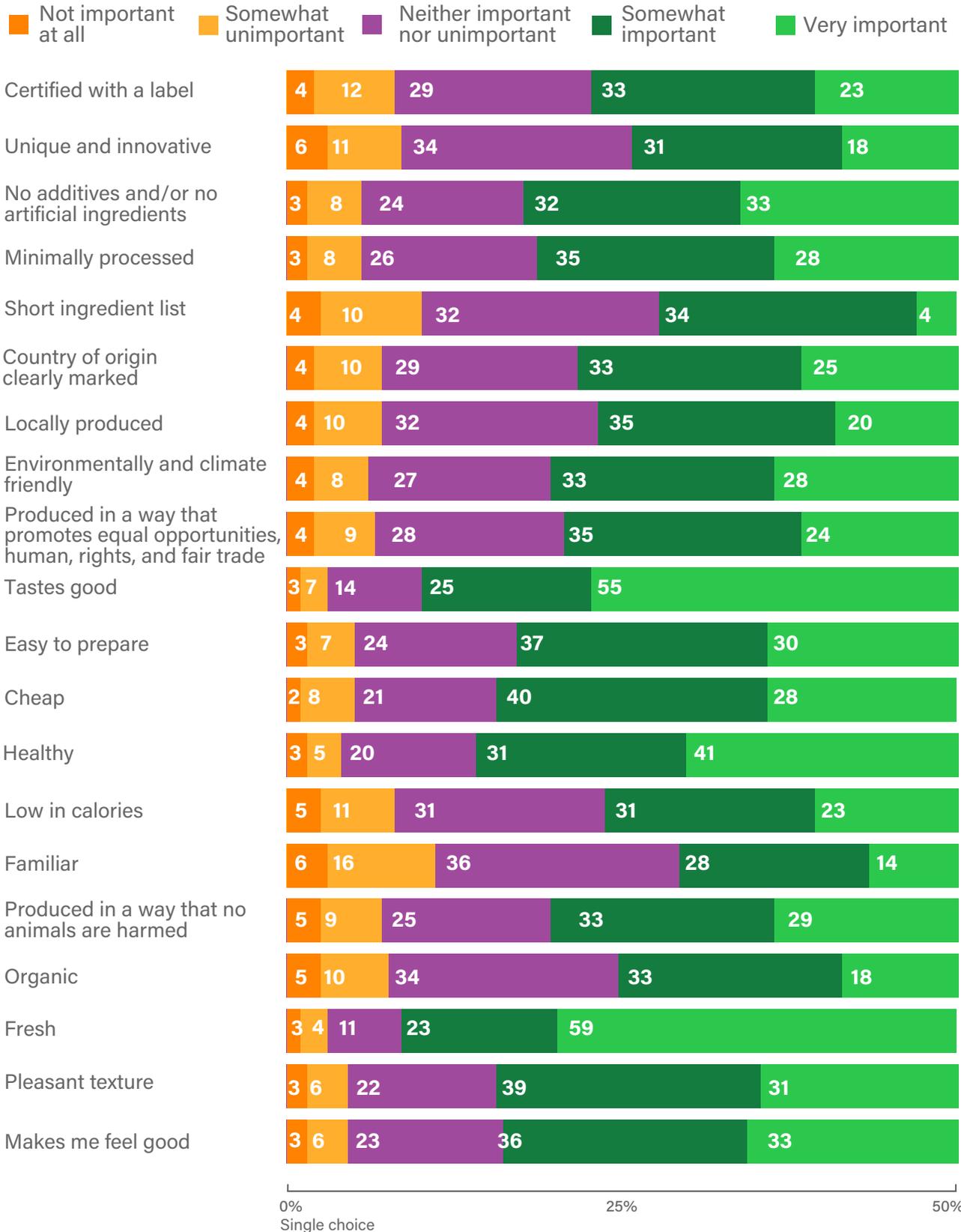
Q24 Which of the following would you like to have as a main ingredient in plant-based food? Please select all that apply.





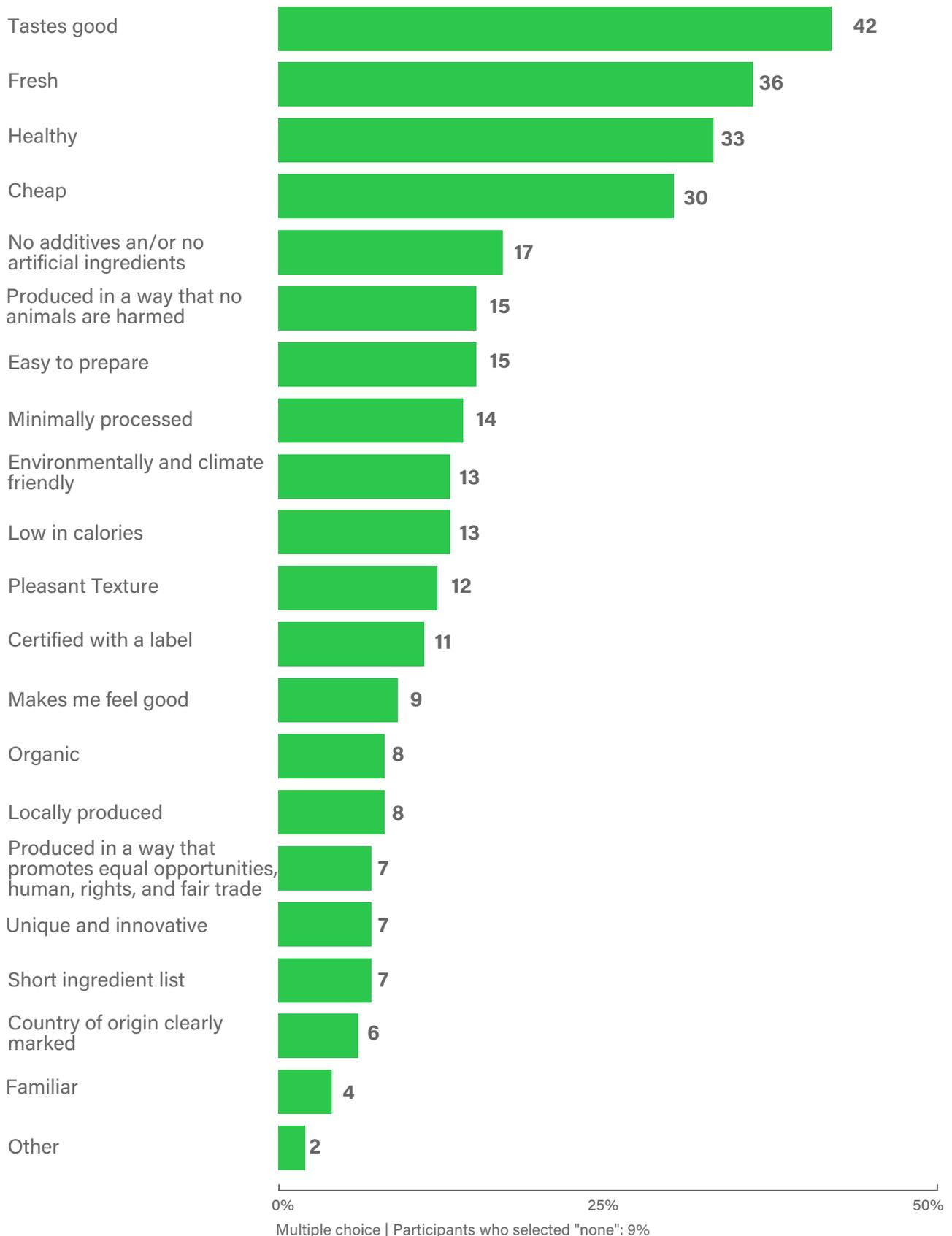
Q25 What factors are important for you when choosing a food product? It is important to me that the food product I choose...:

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





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

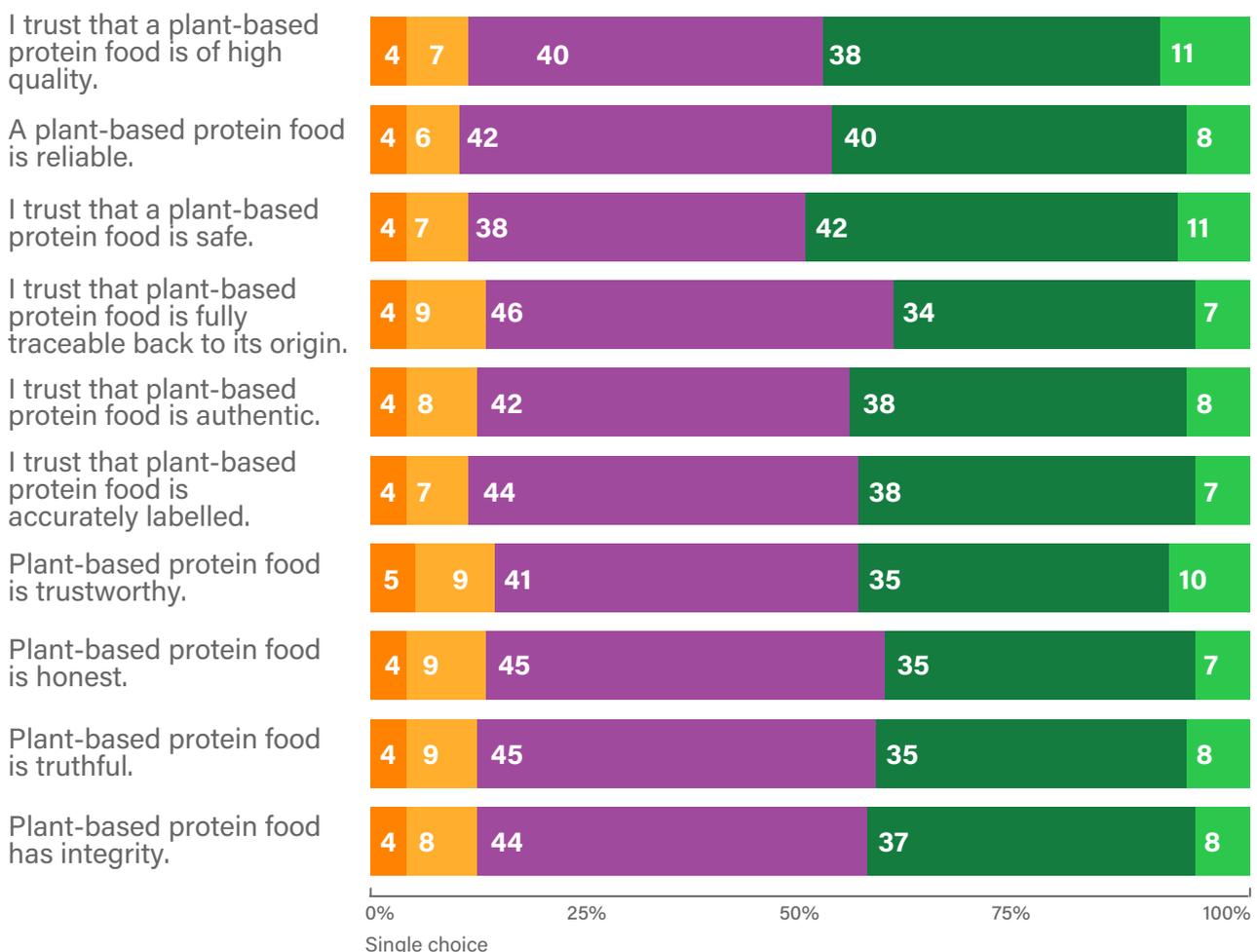




Q27 Please indicate how much you disagree or agree with each of the following statements with regards to trust towards foods based on plant protein (e. g. based on soy protein, pea protein etc.).

More than 50% of Polish consumers trust that plant-based protein food is safe.

■ Strongly disagree
 ■ Disagree
 ■ Neutral
 ■ Agree
 ■ Strongly agree

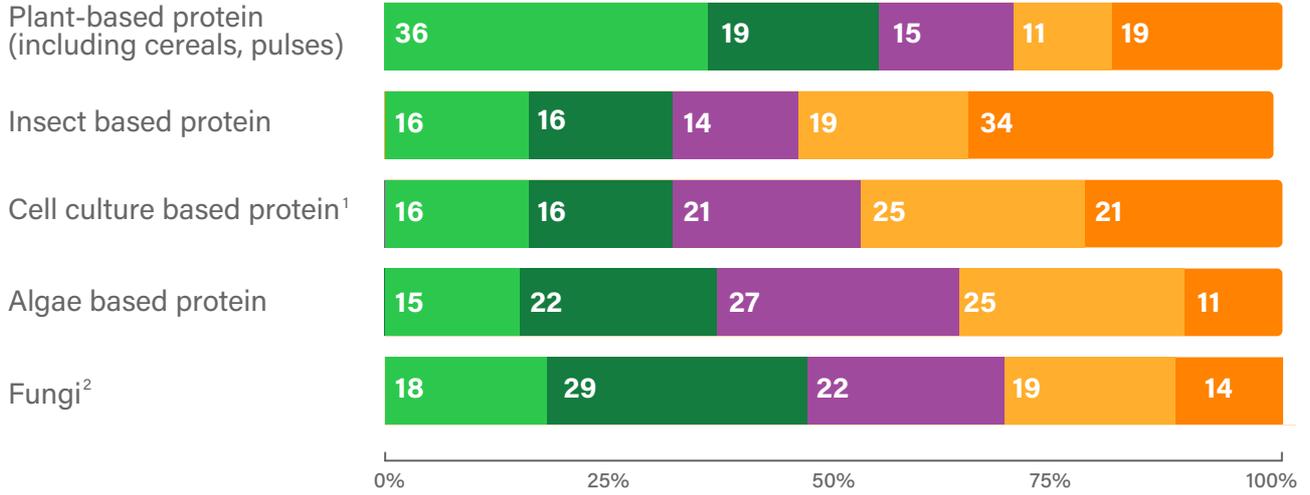




Q28 Which of the following alternative proteins do you trust the most? Rank them from 1 (trust the most) to 5 (trust the least).

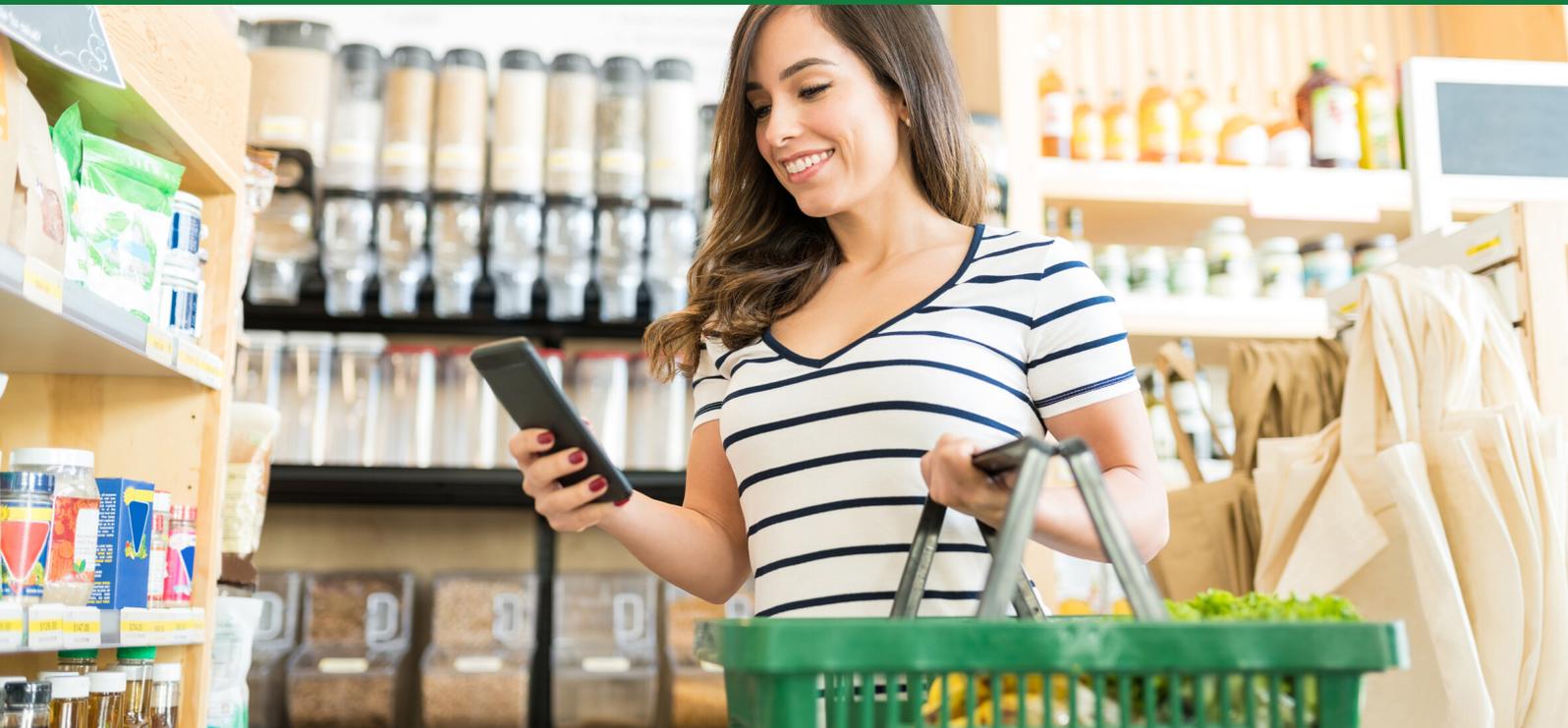
Polish consumers trust plant-based protein and fungi the most.

■ 1 (trust the most)
 ■ 2
 ■ 3
 ■ 4
 ■ 5 (trust the least)



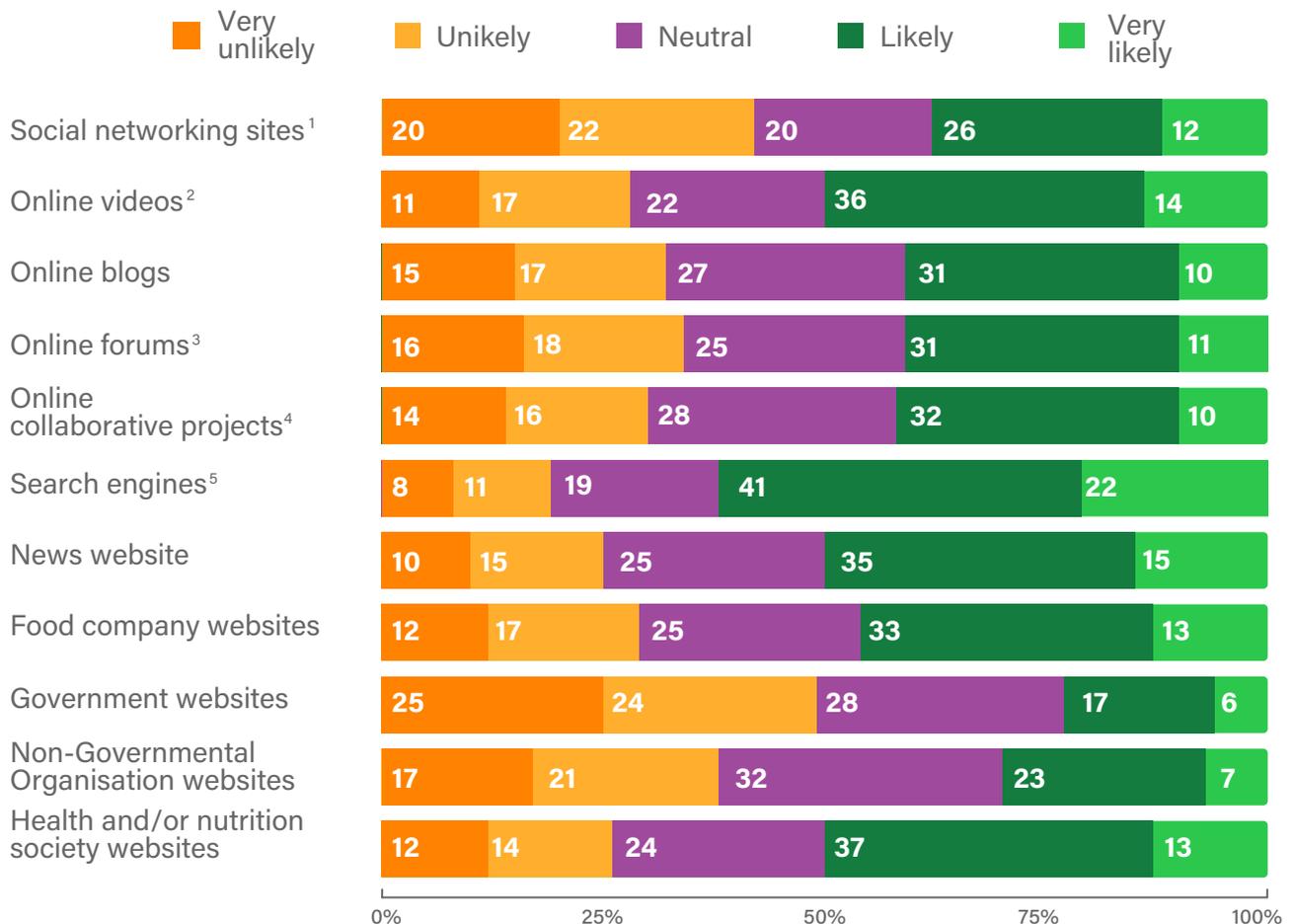
Ranking answer option
 Examples: 1: Cultured meat, cultured dairy, etc. 2: Mushroom, mycelium yeast





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

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



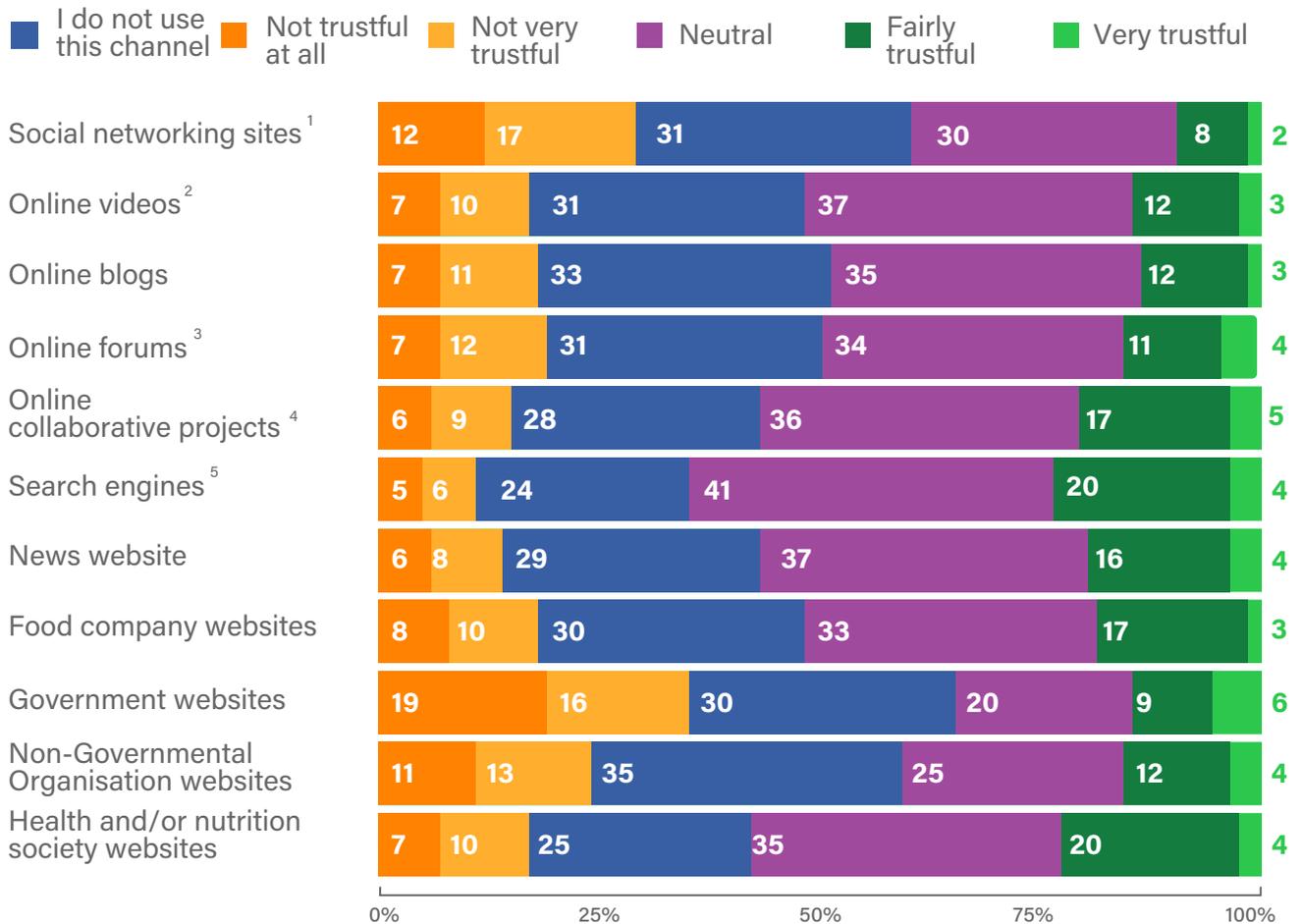
Single selection

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



Q30 In general, how much would you trust the information about plant-based food products from...?

Polish consumers trust health and nutrition-society websites the most.



Single selection

Examples: 1: Facebook, Twitter, Instagram, Pinterest 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 alternative-protein 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 plant-based 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 <https://smartproteinproject.eu/plant-based-food-sector-report/> (last accessed 10.01.2022).
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- 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 <https://smartproteinproject.eu/consumer-attitudes-plant-based-food-report/> (last accessed 10.01.2022).
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