

PLANT-BASED AND ORGANIC CHOICES IN SWEDEN AND POLAND

– CONSUMER INSIGHTS





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BUSINESS
DEVELOPMENT
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INTRO

We all have a responsibility to advance the green transition. Whether simply acting as a consumer or as an international decision-maker in a major retail chain, we all have an obligation to move the green transition forward.

In this analysis, Organic Denmark and the Plant-based Knowledge Centre have focused on the green consumer segment in Poland and Sweden (flexitarians and vegetarians) and their food preferences. Common to this group of consumers is that they are particularly concerned about the 'climate', 'animal welfare' and the 'use of pesticides' – topics that are all foundational to the organic mindset.

Unfortunately, consumers are often faced with a choice between products that are either organic, or 100% plant-based. This analysis aims to highlight the importance of a combined organic and plant-based agenda.

Suppliers and retailers must not neglect this, but instead try to target and influence innovation forces and product offerings in this direction. The future must be both organic and plant-based at the same time!



UDARBEJDET AF:



Dansk
Vegetarisk Forening



Plantebaseret Videnscenter



ØKOLOGISK
LANDSFORENING

STØTTET AF:

Fonden for økologisk landbrug

CONSUMER PROFILES

This survey was carried out in Poland and Sweden. In the survey, green consumers are defined as people who are flexitarians or vegetarians. The aim of the survey is to identify consumer attitudes and preferences towards organic and plant-based foods.



POLAND FACTS

Total population (2023):

37.7 million.

GDP per capita (2021):

EUR 16,500

Organic food sales account for 0.6% (2022) of total food sales, but are growing by approx. 10% a year.

Annual expenditure on organic food per person:

EUR 8

Poland is one of the countries in Europe with the **lowest consumption of organic products per capita.**

SWEDEN FACTS

Total population (2023):

10.4 million.

GDP per capita (2021):

EUR 56,000

Organic food sales account for 8.2% (2022) of total food sales, and have grown by approx. 9% a year between 2004 and 2021.

Annual expenditure on organic food per person:

EUR 266

Sweden is one of the countries in the world with the **highest consumption of organic products per capita.**

*The surveys were conducted between 29 May and 22 June 2023 (Poland) and 22-26 June 2023 (Sweden).
All data presented in this analysis has been collected by Organic Denmark and the Plant-based Knowledge Centre.*

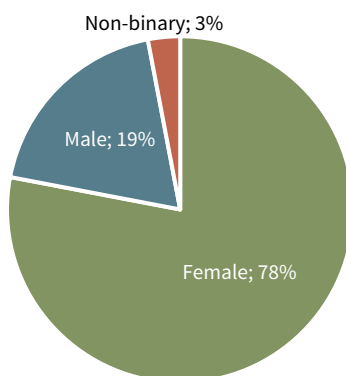
POLISH CONSUMERS – IN THIS SURVEY



POLAND

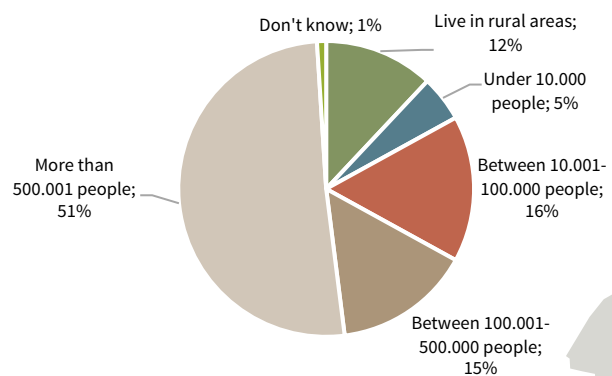
– MEASURED BASED ON 4
DEMOGRAPHIC FACTORS

GENDER

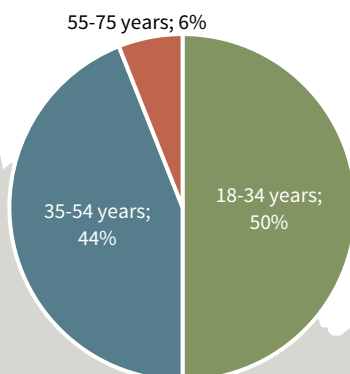


LIVING AREA

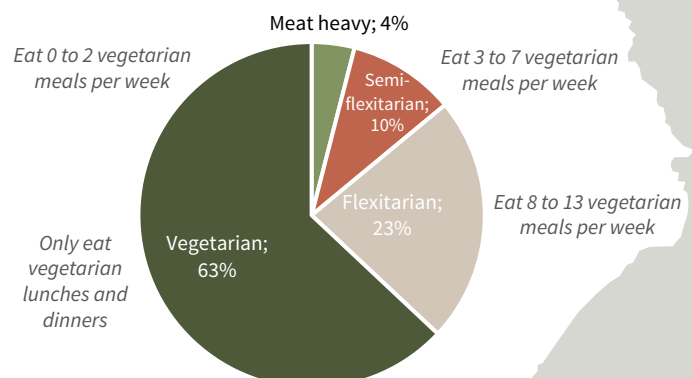
(NUMBER OF INHABITANTS)



AGE



DIET

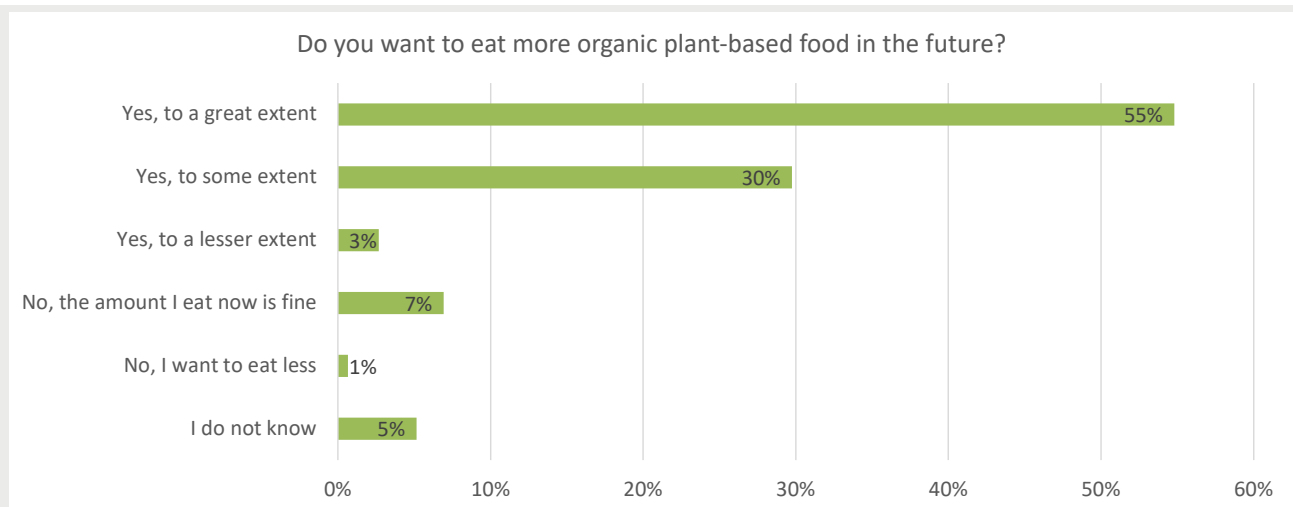


Number of respondents: 519

GREEN CONSUMERS IN POLAND WANT MORE ORGANIC PRODUCTS



Danish organic companies have good opportunities to create export growth on the Polish market. This is the conclusion of a survey conducted by Organic Denmark in collaboration with the Plant-based Knowledge Centre. In the survey, 88% of green consumers in Poland indicated that they want to eat more organic and plant-based food in the future.



The green consumers in the survey are primarily vegetarians or flexitarians, the majority of whom currently buy between 1-19% organic food. But this group of consumers wants to increase their purchases of plant-based foods which are organic in the future.

"When 88% of respondents answer that they want more organic products in the future, it opens up opportunities for Danish companies and producers. We are already known on the Polish market for delivering high quality and safe food," says Dennis Hvam, International Market Director at Organic Denmark.

The survey shows that the barrier to green consumers buying more organic food is lack of choice. 46% responded that this is the reason why their organic share is not larger.

"Denmark is a world champion in organic products. It is only natural for us to use our know-how, innovativeness and extensive experience to get on board in Poland and work towards consumers having a wider range and more value positions."

In parallel with this activity, the analysis also recommends that Danish companies and relevant players in the market begin marketing organic products and massively raising awareness among consumers, who have limited knowledge of organic produce and the underlying values.

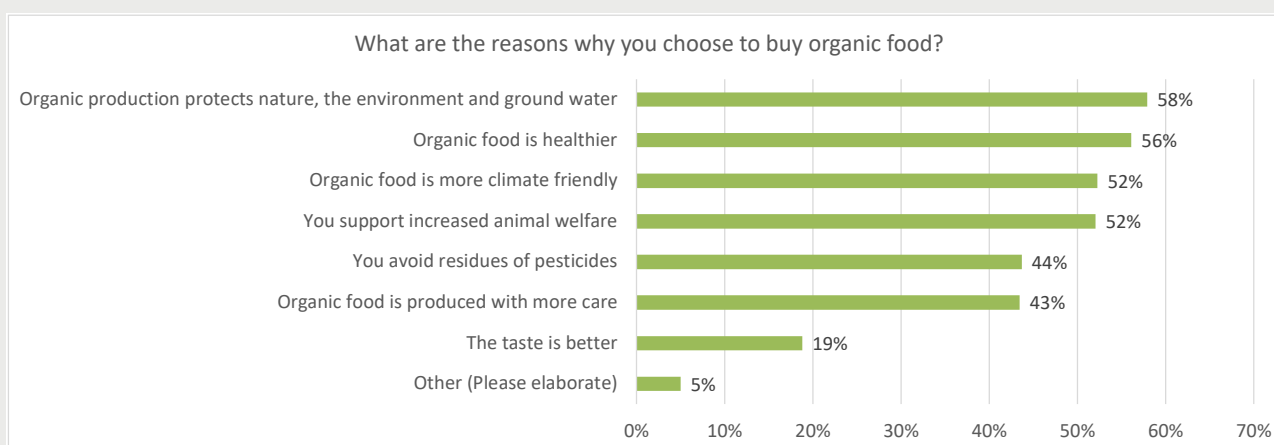
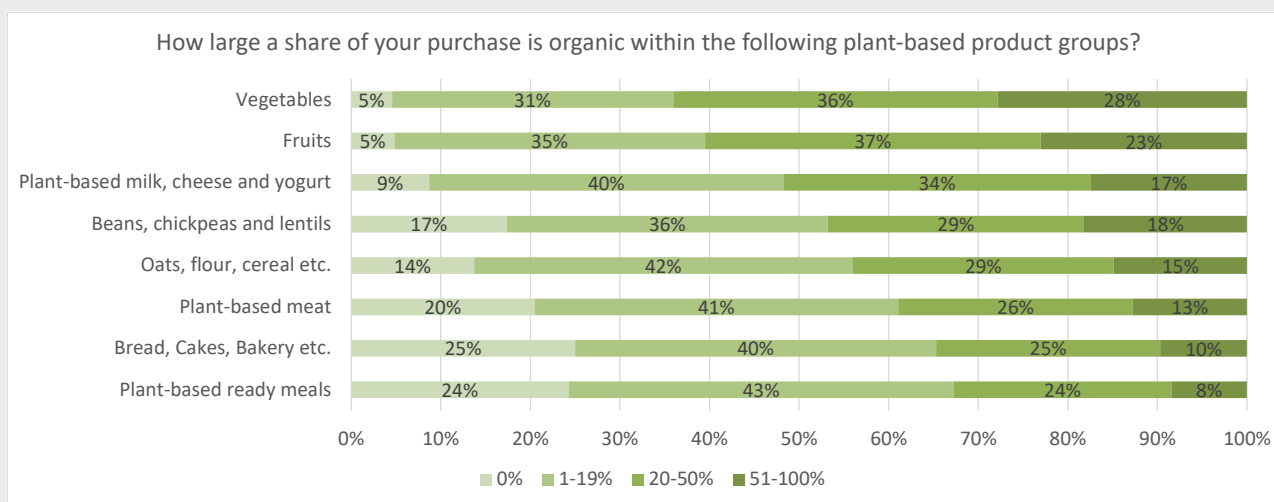
"Animal welfare, the desire for pure food products and more biodiversity are high on the wish list for green consumers in Poland, but there is a major lack of awareness that organic food contributes to precisely these goals," Dennis Hvam explains.

"Danish companies can also draw here on experience from the Danish market, where they have been important players for decades in informing consumers and spreading knowledge about organic produce."

The analysis recommends that Danish companies focus particularly on the young, green consumers who live in the large Polish cities.



FRUIT, VEGETABLES AND PLANT DRINKS ARE POPULAR



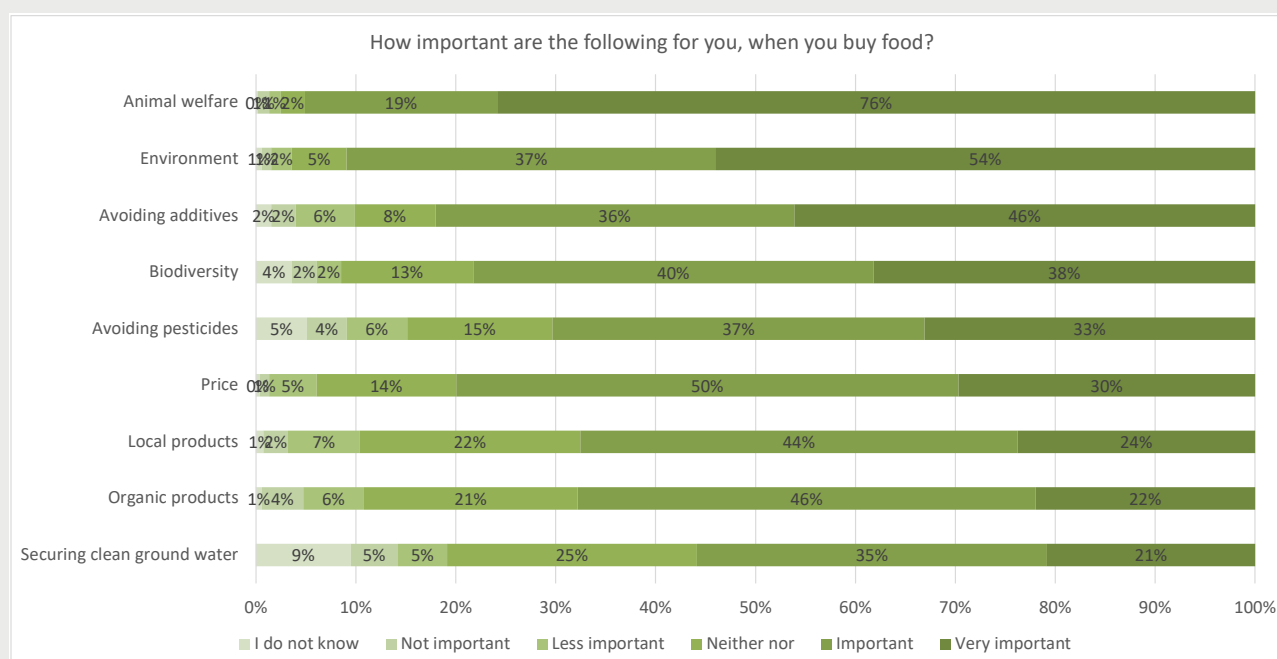
The most popular plant-based products that green consumers buy in an organic variant are fresh fruit and vegetables, and plant-based dairy alternatives such as plant-based drinks, yogurt and cheese.

In contrast, plant-based ready meals rank at the very bottom of the preference list, along with bread and cake. This suggests that consumers generally do not

associate ready meals, fast food and cake with organic food. It is also due to the fact that consumer motivation for choosing organic versions of the various foods is highly linked to health and nature. The survey shows that 58% and 56% of respondents, respectively, cite protection of nature and groundwater and personal health as reasons for choosing organic food.



LACK OF AWARENESS OF ORGANIC PRODUCTS



In general, green Polish consumers lack knowledge about organic food. Consumers do not always associate organic products with sustainability when asked what is most important to them in their food choices.

Not surprisingly, the majority (76%) say that animal welfare is the most important factor for them when buying food. This is followed by environmental considerations and the desire to avoid unnecessary additives. Paradoxically, only 22% of survey

participants consider choosing organic to be important.

This shows that consumers in Poland lack knowledge about the foundational values of organic produce. The analysis recommends that organic products be packaged or labelled with more information than just an organic label. For example, stating that the product does not contain artificial additives or has been grown without the use of pesticides.



PRICE AND RANGE ARE CRITICAL



Like all European countries, Poland is also facing the cost-of-living crisis. This is the main reason why respondents in the survey say that price is critical when choosing plant-based, organic products.

But the lack of a complete range with several value positions is another reason why consumers do not choose plant-based, organic foods.

MARKET RECOMMENDATIONS

If your company wants to grow its exports, and you are considering targeting the Polish market for plant-based, organic food, the analysis recommends that you:

- provide information on the product about the core values and methods of organic produce
- state that no artificial additives have been added to the product – especially in the case of processed foods
- have a greater focus on explaining to consumers that they contribute to more biodiversity by buying organic and plant-based products, and that plant-based, organic food choices also contribute to better animal welfare
- take into account that legumes and potatoes are seen as very positive ingredients by the target group
- note that it is particularly young consumers in major cities that buy processed plant-based products

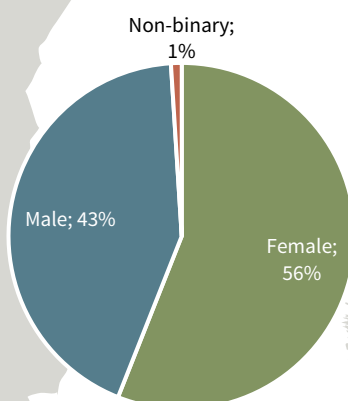


SWEDEN

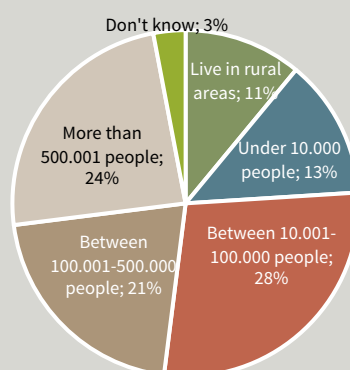
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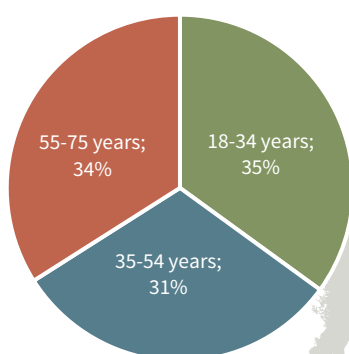
GENDER



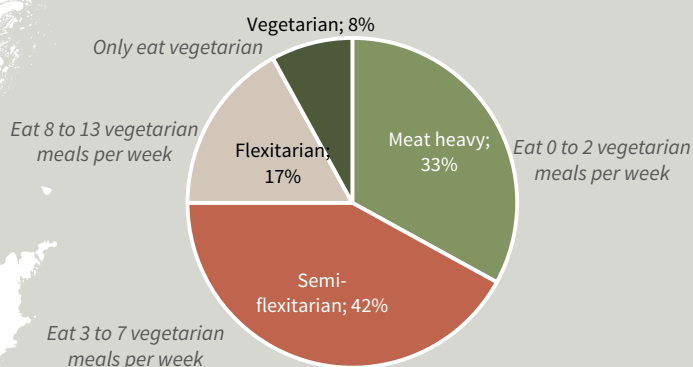
LIVING AREA (NUMBER OF INHABITANTS)



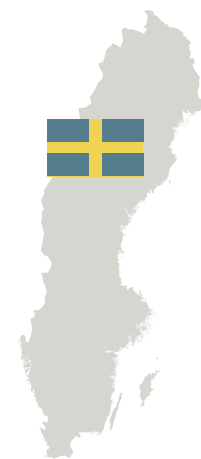
AGE



DIET

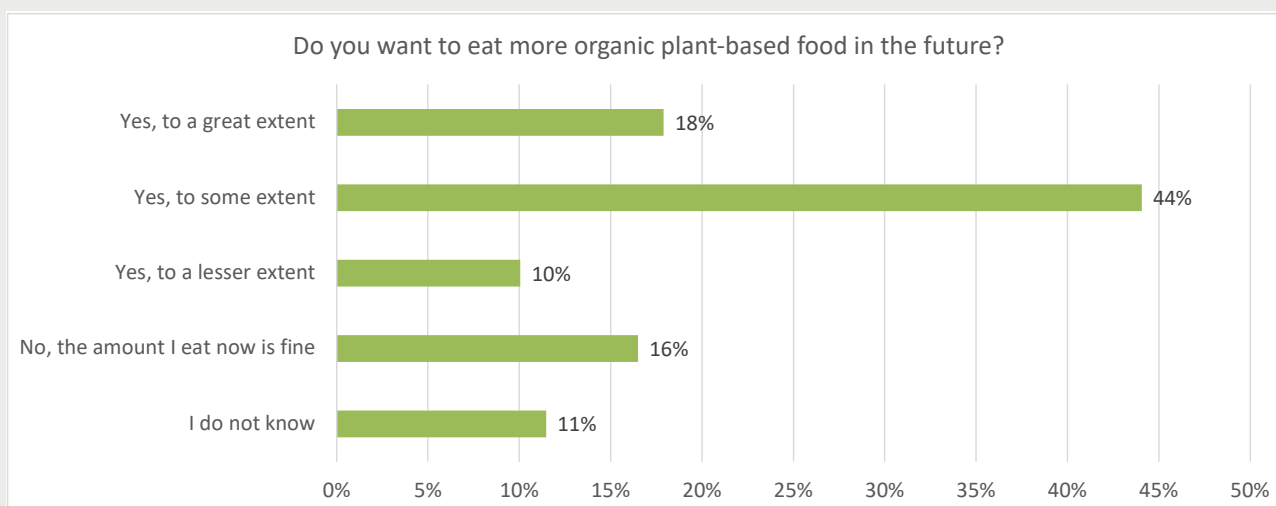


Number of respondents: 514



MEAT-LOVING SWEDISH CONSUMERS ARE READY FOR PLANT-BASED ORGANIC FOOD

A new analysis from Organic Denmark shows that Swedish consumers who mainly eat meat today are ready to make meal changes. 52% of the meat-loving group wants to eat more plant-based and organic foods in the future.



While the debate rages as to whether eating meat is a human right, consumers are getting ready to move their eating habits in a greener direction. In the survey, conducted jointly by Organic Denmark and the Plant-based Knowledge Centre, over half of Swedish consumers who currently have meat as a main ingredient in their diet indicated that they would like to eat more plant-based and organic food in the future.

"The results suggest that Swedish consumers know it is necessary to make changes to meals, and are willing to help bring about that change," says Dennis Hvam, International Market Director at Organic Denmark.

"The survey also shows that Swedish consumers already eat more plant-based meals than Danish consumers. This makes this neighbouring market very interesting for Danish companies working with plant-based, organic food."

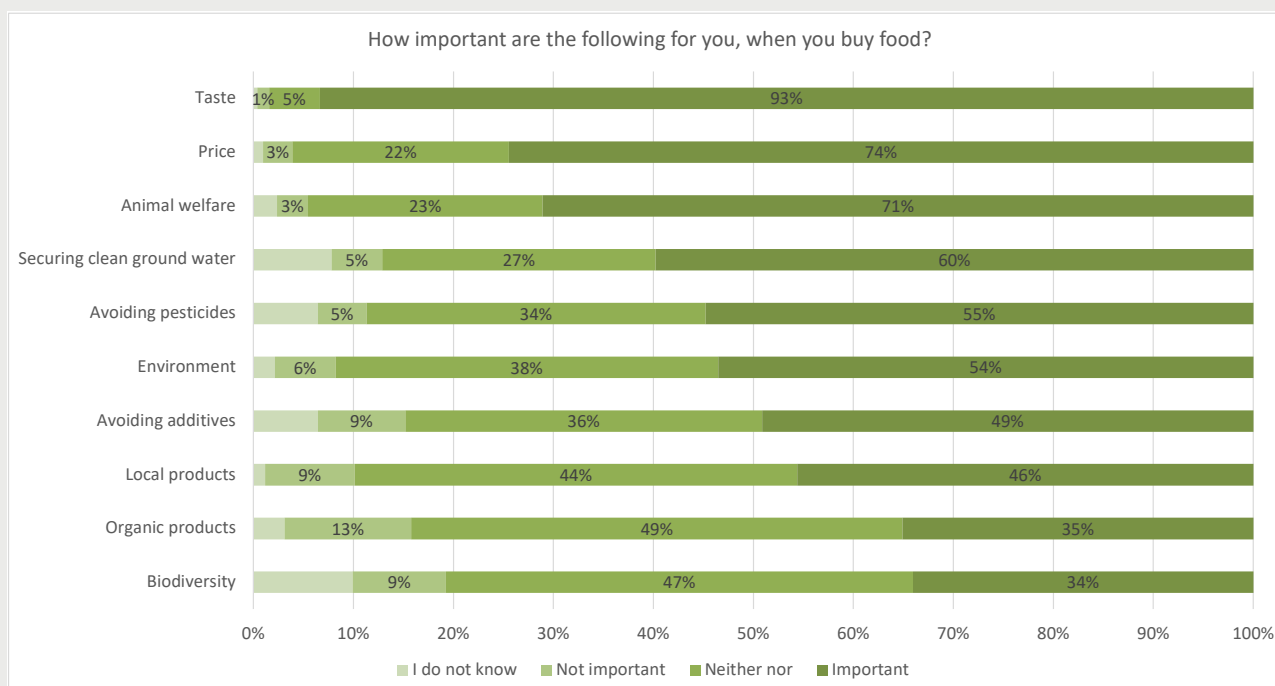
Interest in buying organic products in the group of surveyed consumers is also great. 72% are willing to pay more for a plant-based food product that is also organic, and those who eat plant-based foods are also more aware of buying organic.

"The Swedish market is similar to the Danish market, but with the difference that the range of organic and plant-based foods is more narrow than in Denmark. This is actually cited as the main reason why consumers do not buy organic," he explains.

"This is practically an invitation for more Danish companies to get involved and help supply the good, varied range we can boast of in Denmark."



TASTE AND PRICE ARE CRITICAL IN FOOD CHOICES



When Swedish consumers fill their shopping carts, the taste of the food is paramount. 93% of respondents report that taste is important to them. After that, price is critical for 74% of survey respondents.

In third place among factors that determine food choices is a desire to promote animal welfare. Biodiversity, protecting groundwater, environmental considerations and avoiding additives and pesticides are also key factors. Being organic only makes it to the second-last place.

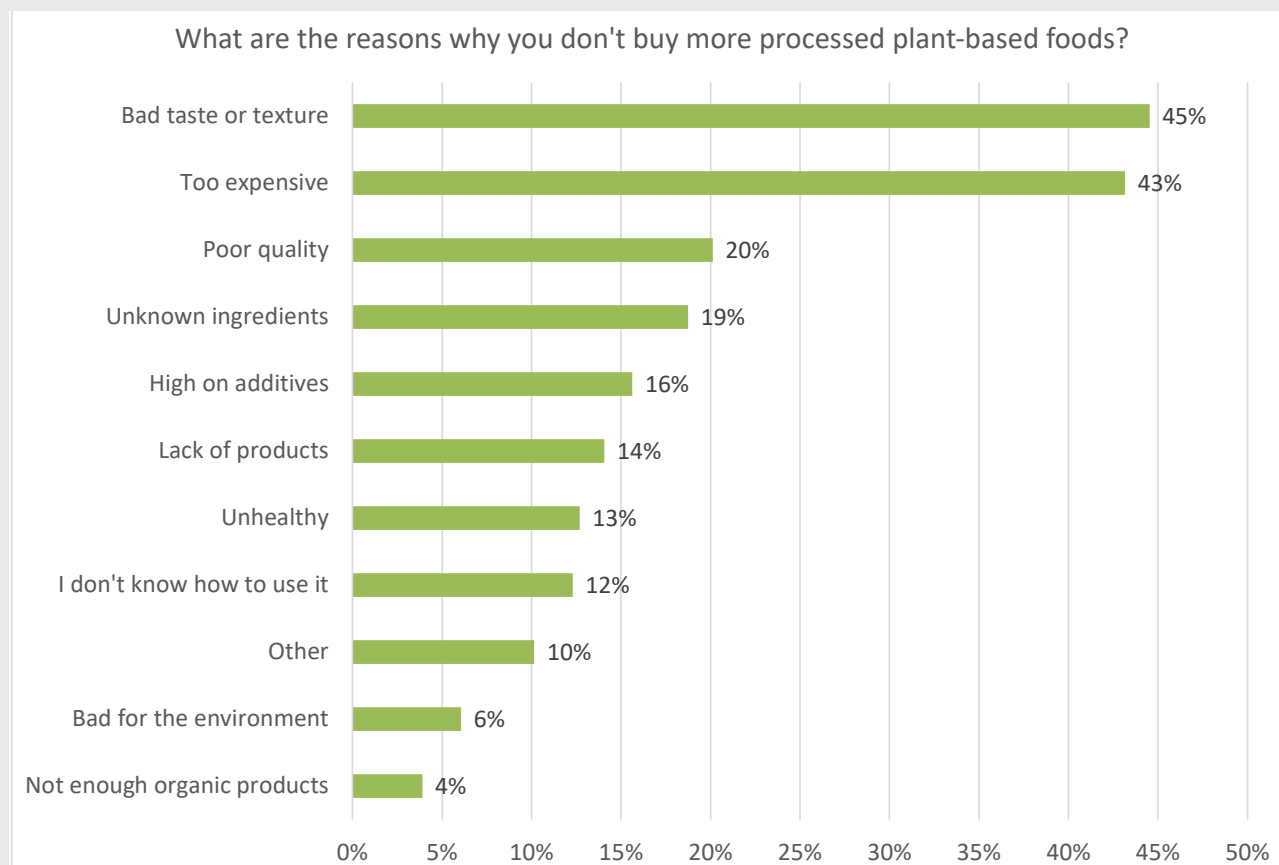
This means that, like Polish consumers, Swedes also do not link organic products to the factors that lie at the core of organic production.

"It's surprising that Swedish consumers don't rank organic products higher in the survey, when factors such as animal welfare and environmental considerations are given such high priority," says Dennis Hvam, International Market Director at Organic Denmark.

"It appears that we and the organic producers and companies have a lot of work ahead of us in directly reminding consumers of the fundamental values of organic products. But, as is also the case in Denmark, there is a lot of work ahead in Sweden to retell both new and old generations of the basic values of organic food, which closely match the values of green consumers."



PLANT-BASED READY MEALS NEED TO DO BETTER ON TASTE AND PRICE



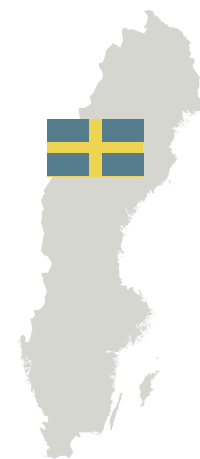
The combination of something that does not taste good, but is expensive, is a 'no go' for Swedish consumers. Poor taste and texture are the reasons why 45% choose not to buy processed, plant-based products. In addition, 43% feel that the products are too expensive.

The survey of Swedish consumer attitudes towards plant-based products is otherwise positive, showing that 61% of participants occasionally buy the products.

"Swedish consumers are ready to buy organic plant-based products, but feel the products they can get

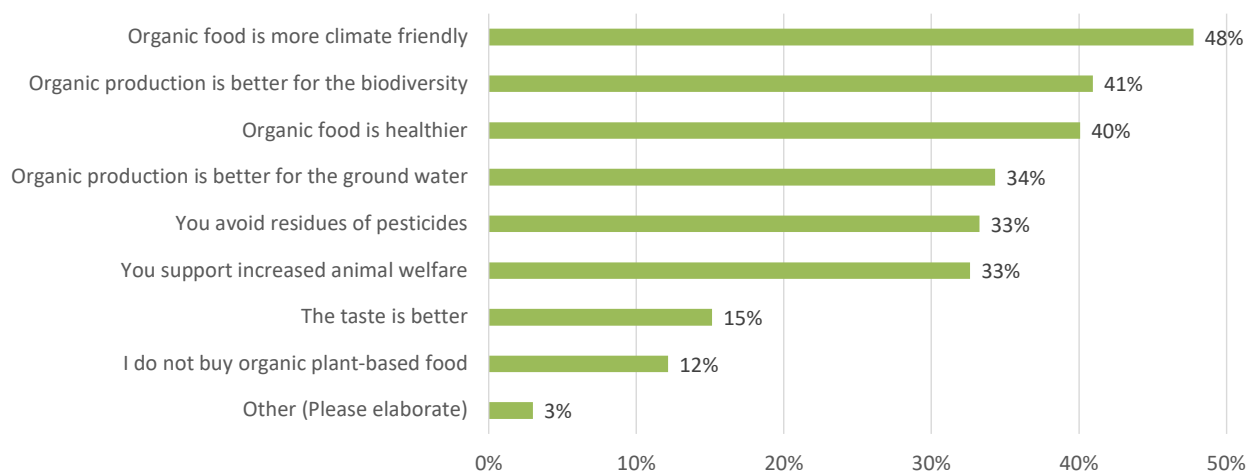
today are too expensive, too few and of too poor quality," says Dennis Hvam, International Market Director at Organic Denmark.

"The market and demand are there. So now it's up to producers and other market players to develop the products so that taste, price and range meet consumer expectations. There is great potential in the Swedish market for anyone who cracks the code – especially among young consumers in the major cities."

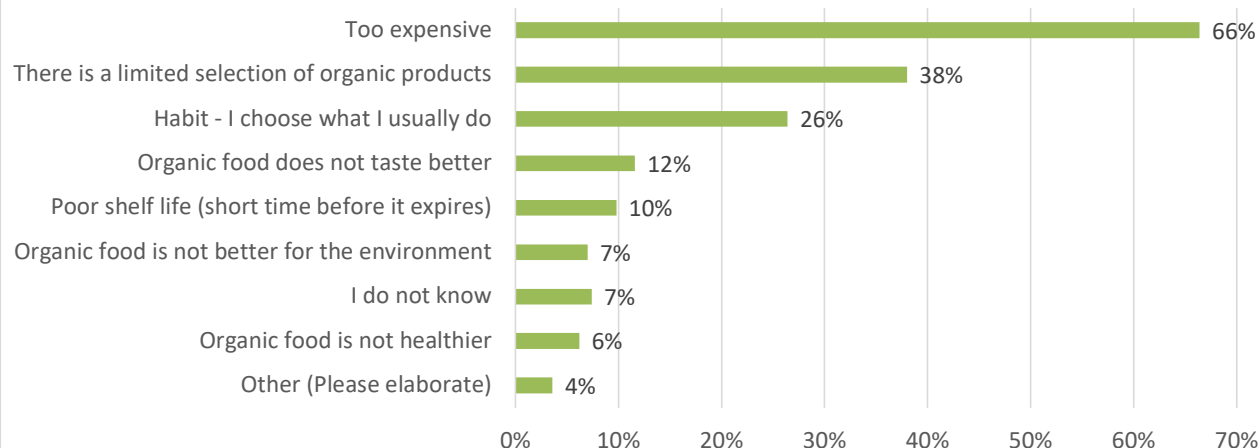


SUSTAINABILITY AND ORGANIC PRODUCTION GO HAND IN HAND

What are the reasons why you choose to buy organic food?



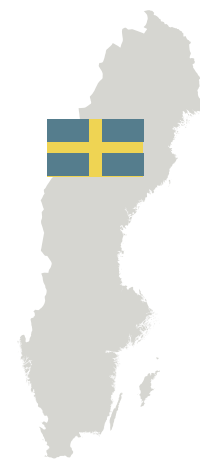
What are the reasons why you don't buy more organic foods than you do now?



For Swedish consumers, organic products and sustainability are closely tied. In the survey, 48% of respondents said they buy organic food for the sake of the climate, while 41% choose organic because organic production is better for biodiversity.

But factors such as their own health (40%) and groundwater protection (34%) are also important in relation to choosing organic in Sweden.

As in other countries, Swedish consumers have focused on price during the cost-of-living crisis. But 72% of respondents still find it acceptable to pay more for organic food. However, it is worth noting that 66% of survey participants report that they choose not to eat organic food because it is too expensive, and because the range is too limited.



MARKET RECOMMENDATIONS

If your company wants to grow its exports, and you are considering targeting the Swedish market for plant-based, organic food, the analysis recommends that you:

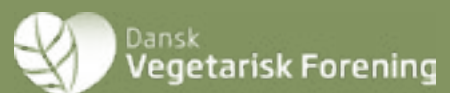
- Particularly focus on product taste, to improve the taste experience in the future, as this is one of the main reasons why Swedish consumers avoid plant-based products
- The same goes for the price. Swedish consumers feel that many of the plant-based, organic products are too expensive
- Target younger segments living in large cities, as they are most positive towards plant-based, organic products
- Market the positive link between organic and plant-based foods, as there is a clear perception of this link among Swedish consumers
- Create awareness of the organic label among Swedish consumers, e.g. by informing them of the principles and values of organic production in relation to animal welfare and protection of drinking water
- Focus on animal welfare when marketing plant-based, organic products, as animal welfare is of third most important factor for Swedish consumers in their food choices
- Focus on some of the categories where a wider range on the shelves is needed. For example, ready meals, baked goods and plant-based meat alternatives

WANT TO HEAR MORE ABOUT ORGANIC PLANT-BASED FOODS?

Then register for our webinar on 12 December.

To register, please contact
Daniel Barrera Madsen by e-mail at:

daniel.madsen@vegetarisk.dk



STØTTET AF:

Fonden for **økologisk landbrug**

