Vegetarisk Forening

DEMAND FOR ORGANIC PLANT-BASED FOODS AMONG FLEXITARIAN, VEGETARIAN AND VEGAN CONSUMERS IN FRANCE

INSPIRATIONAL PAPER

Prepared by
The Vegetarian Society of Denmark, 2022

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Demand for organic plant-based foods among flexitarian, vegetarian and vegan consumers in France

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Introduction

The purpose of this inspirational paper is to present the preferences of French flexitarian, vegetarian and vegan consumers in organic and organic plant-based foods (in the following, the term 'green consumer segments' is used when these three consumer groups are mentioned collectively).

The inspirational paper can be used as a basis for a dialogue with buyers in France and to equip Danish organic plant-based producers for exports to the French market.

The inspirational paper thus has a dual purpose and will also contribute to increasing the level of knowledge about the green consumer segments in France in general.

The inspirational paper is based on 548 responses among the green consumer segments, distributed on 42% respondents who eat vegan, 41% respondents who eat vegetarian and 19% respondents who eat flexitarian1. The gender distribution for the green consumer segments is 77% women, 22% men and 1% binary, while the age distribution is 20% for 13-34-year-olds, 41% for 35-55-year-olds and 39% for respondents aged over 55.

In the EU project 'Smart Protein', 27%2 of the consumers state that they eat flexitarian (defined as 'I sometimes eat meat, but I am trying to reduce my meat consumption and often choose plant-based foods instead'), while the figure in our survey is 17%. However, this can probably be attributed to the use of a broad definition of flexitarians in the Smart Protein project as opposed to our survey, in which we ask more directly about how many meals they eat weekly that contain meat.

In the Smart Protein project, the share of vegetarians and vegans is 6%,3, whereas they make up 41% (vegetarians) and 42% (vegans), respectively, in our survey.

Results and conclusions

92% of the green consumer segments have an organic share of at least 20%. France is thus a country with very high organics preferences.

As an overall group, i.e. for persons who eat flexitarian, vegetarian and vegan, the share who make organic food purchases of 80-100% is 41%. The consumer segment that eats flexitarian has the highest share of 47% for organics purchases of 80-100%, while it is 37% and 36% for the group that eats vegetarian and vegan, respectively. The fact

[1] The flexitarian consumer segment consists of persons who have stated that they eat vegetarian supplemented with fish as well as persons who eat meat and/or fish up to 2-3 days a week.

[2] https://proveg.com/wp-content/uploads/2021/11/FINAL_Pan-EU-consumer-survey_Country-Specific-Insights-2.pdf

[3] https://proveg.com/wp-content/uploads/2021/11/FINAL_Pan-EU-consumer-survey_Country-Specific-Insights-2.pdf

that the green consumer segments have a high organics share is very positive if we want to export organic products to this market, although the satisfaction with the range of organic plant-based foods is also relatively high, but with the possibility for improvement (see further below).

As an overall consumer group, 31% and 32% of the green consumer segments are willing to pay up to 10% or 11-20% extra for organics, respectively, while only 6% are not willing to pay more for organics. Among the green consumer segments, around 60% are thus willing to pay up to 20% extra for organics. Organics as a preference is thus something the green consumer segments are also willing to pay more for, which is useful knowledge when organic plant-based products are to be priced and gain a foothold in the French market.

Across the green consumer segments, the statements ‘Animal welfare’ (97-99%), ‘Safeguarding biodiversity’ (96-99%) and ‘Looking after nature and the environment’ (97-98%) are those most frequently selected by the respondents. These statements are embraced to a high degree in ecology, and it may therefore be relevant to work with communication of these statements in connection with exports to the green consumer segments.

Based on the green consumer segments’ views on the listed reasons for buying organic products, the ‘classic’ reasons dominate: ‘Organic production protects nature, the environment and groundwater’ (72-81%), where persons who eat vegan rank highest with 81% and ‘You avoid pesticides when buying organic foods’ (69-76%), where persons who eat flexitarian rank highest with 76%. These reasons will consequently still be relevant to highlight vis-à-vis the green consumer segments in France when selling organic plant-based foods to France.

Most respondents among the green consumer segments in France state ‘animal ethics’ as the reason why they eat the way they do (79-94%), followed by ‘climate/environment/sustainability’ (60-78%) and ‘health’ (46-57%). Regarding the ‘health’ reason, the share is highest among the persons who eat flexitarian (57%). Communication to the green consumer segments in France can thus benefit from awareness that the green consumer segments have animal ethics as one of the main reasons for eating the way they do.

For persons who eat vegan, there is a stronger demand for veg labelling (vegan) than for organic labelling, while for both persons who eat vegetarian and flexitarian, there is a higher share who find that a national and European organic labelling scheme is ‘Very important’ or ‘Important’. The green consumer segments generally show high support for labelling schemes. This knowledge is useful for export companies if they want to create value and provide guidance for the green consumer segments.
Among the green consumer segments, 65-78% state that they do not buy organic plant-based toppings and the figure is 43-50% for organic plant-based ready meals. A possible explanation for why the green consumer segments state that they do not buy

these foods may be that these products are not currently available (including in a sufficient quality), and there may therefore be an opening for Danish exporting companies within these categories, although this will require a more in-depth mapping of the French market.

As an overall group, 90% in the green consumer segment find it 'Very important' or 'Important' that plant-based foods are as natural and as little processed as possible. In the green consumer segment, between 88-97% find it 'Very important' or 'Important' that plant-based foods are as natural and as little processed as possible. This is consequently something that the green consumer segments find important when buying plant-based foods, which is also in line with organic foods often being less processed. This may be useful information for food producers in relation to their marketing of plant-based products, including by linking it to organic plant-based products being less processed, and the producers can therefore market themselves on this.

Around half of the green consumer segments state that they shop in supermarkets and speciality stores weekly (47-59%), while this figure is only 10-11% for discount supermarkets. Over 70% of green consumer segments state that they 'almost never' or 'never' shop online. For persons who eat flexitarian, most of the respondents shop weekly in supermarkets (57%), while this concerns speciality stores for persons who eat vegetarian (57%) and vegan (59%). Based on the shopping places of the green consumer segments, it would be advantageous to start with supermarkets and specialty stores in relation to the export part.

Recommendations

Based on this consumer survey among the flexitarian, vegetarian and vegan consumer segments in France, clear organic preferences are seen, including willingness to pay for organic products. In addition, the survey also indicates that the green consumer segments in France want their plant-based foods to be as little processed as possible. This is positive for organics, as organic plant-based foods will largely be less processed, so that the degree of processing can itself also be seen as a competitive parameter for companies offering organic plant-based foods.

Likewise, there may be an opening for exports of organic plant-based toppings and organic plant-based ready meals, as French consumers state that they do not buy these products, which may be due to a lack of availability at the present time and a lack of sufficient quality.

Communicative means

The green consumer segments in France also agree the most with statements that are closely linked to organic production, for example 'animal welfare', 'safeguarding biodiversity' and 'looking after nature and the environment'. Focus on communicating these statements when companies want to export organic plant-based foods can thus be a communicative lever/means that highlights something the green consumer segments have a positive attitude towards and which can therefore be emphasised instead of solely using the term organic.

If all three segments of flexitarian, vegetarian and vegan consumers are to be catered for, the use of labelling for both organic and vegetarian/vegan on organic plant-based foods will be a competitive parameter and constitute useful information for the green consumer segments.

The reason that most respondents among the green consumer segments in France state for why they eat the way they do is 'animal ethics', followed by 'climate/environment/sustainability' and 'health'. Knowledge about the motives of the green consumer segments can, for example, contribute to sharpening organic plant-based companies' marketing to these groups.

The green consumer segments' motives for buying organic products are primarily connected with statements related to 'organic production protects nature, the environment and groundwater' and 'you avoid pesticides when buying organic foods'. The fact that the green consumer segments buy organic products for these reasons also provides an opportunity to communicate these reasons in the marketing of organic plant-based products when they are to establish a foothold in the French market.

Strengthening and increasing Danish organic plant-based exports also require that food producers have knowledge of the different countries' rules for these foods, including the requirements from the retail chains that the producers want to access. This can be a big task, and different stakeholders, including the Danish Ministry of Foreign Affairs and Organic Denmark, are therefore trying to help producers with this knowledge and support companies' access to different export markets.

The marketing of organics is something that must be continuously explored and strengthened, as the benefits of organics are not necessarily known to all consumer segments or consumers need to be reminded of what organics entails. How and in what way the producers can best market their products and messages on, for example, the packaging are thus elements that it will be advantageous to develop – including whether some information can advantageously be provided via a QR code and not necessarily on the packaging.

In addition, many consumers will probably continue to associate organics with a high price, and pricing is therefore also a central factor and that organic plant-based foods can compete on price. The location of organic plant-based products in supermarkets and online is also a key element, as many consumers make their purchase decisions while they are shopping.

A highlighting of organics, such as organic plant-based products, as a premium product that offers consumers a lot on the sustainability barometer and that can therefore also warrant a (slightly) higher price is thus a communicative tool that producers and export delegations should keep in mind.

Organic purchases among green consumer segments

Figure 1 – Organic share of food purchases among green consumer segments

How large a share of your purchases are organic? (certified organic)	Number	Percentage distribution
Approx. 80-100%	221	41
Approx. 60-79%	123	23
Approx. 40-59%	100	19
Approx. 20-39%	50	9
Less than 20%	29	5
I do not buy organic products	4	1
Don't know	8	1
Total	**535**	**100**

92% of the green consumer segments in this survey from France have organic food purchases of at least 20%. More than 60% of the green consumer segments state that they have an organic share of between 60-100%, while just under 1/5 has an organic share of between 40-59% and just under 10% have an organic share of between 20-39%.

Just as in Denmark, the green consumer segments in the France have a very high organics share. If we look at the green consumer segments with an organic share of more than 20%, this constitutes 92%, which is on a part with Denmark (94%).4 The fact that the figure is so high in France shows that organics plays an important role when the green consumer segments make their food purchases. It is thus an important point that organics should be available in all food categories and products.

[4] Dansk Vegetarisk Forening 2021: Den plantebaserede forbrugeranalyse (The Vegetarian Society of Denmark 2021: Plant-based Consumer Analysis) – see link

If we look at the green consumer segments divided into whether they eat flexitarian, vegetarian or vegan, they are distributed as follows in the figure below.

Figure 2 – Organic food purchases among green consumer segments, broken down by dietary preferences

Dietary preferences and organics purchases	Approx. 80-100%	Approx. 60-79%	Approx. 40-59%	Approx. 20-39%	Less than 20%	Do not buy organic products	Don't know	Total
Vegan	47% (N=108)	21% (N=47)	14% (N=32)	10% (N=22)	6% (N=13)	1% (N=2)	2% (N=4)	100% (N=228)
Vegetarian	37% (N=82)	27% (N=59)	20% (N=44)	8% (N=17)	6% (N=13)	1% (N=2)	1% (N=3)	100% (N=220)
Flexitarian	36% (N=31)	20% (N=17)	28% (N=24)	13% (N=11)	3% (N=3)	0% (N=0)	1% (N=1)	100% (N=87)

For the highest organics share of 80-100%, the share is 36-47% among the green consumer segments.

For the second highest share of 60-79%, persons who eat vegetarian have the highest share of organics purchases of 27% among the green consumer segments. The largest organics share across the green consumer segments is in the range of 80-100% with 36-47%. In the range of 20-39%, the level among the green consumer segments is 8-13%.

Across the green consumer segments, they all have the highest share for 80-100% organics although the level is highest among those who eat vegan. For an organics share of 60-79%, persons who eat vegetarian have the highest share of 27%, while for an organics share of 40-59%, persons who eat flexitarian have the highest share of 28%. The fact that persons who eat vegan have the highest organics share in this survey indicates that organics plays a particularly important role for this group, although the organics share is also high for persons who eat vegetarian and flexitarian.

Willingness to pay for organics

One thing is how large an organics share the green consumer segments state that they buy, another is how much they are willing to pay for organics. This is important information when introducing organic products in the market.

As an overall consumer group, 31% and 32% of the green consumer segments are willing to pay up to 10% or 11-20% extra for organics, respectively, while only 6% are not willing to pay more for organics. Among the green consumer segments, about 60% are thus willing to pay more for organics (up to 20% extra for organics), which indicates that the green consumer segments want organics. Below, the willingness to pay is presented for each of the three consumer segments.

Figure 3 – Willingness to pay for organics among green consumer segments

Dietary preferences	No	10% extra	11-20% extra	21-30% extra	31-40% extra	41-50% extra	50% extra	Don't know	Total
Vegan	6% (N=15)	25% (N=58)	34% (N=78)	13% (N=30)	2% (N=5)	3% (N=8)	6% (N=14)	6% (N=13)	100% (N=232)
Vegetarian	4% (N=10)	30% (N=68)	31% (N=69)	12% (N=28)	3% (N=7)	2% (N=5)	4% (N=10)	7% (N=15)	100% (N=225)
Flexitarian	6% (N=5)	42% (N=36)	24% (N=21)	13% (N=11)	5% (N=4)	2% (N=2)	2% (N=2)	6% (N=5)	100% (N=86)

Only very few respondents in the green consumer segments state that they do not want to pay more for organics (4-6%), although there are also only few respondents who want to pay more than 30% extra for organics (from 2-5%).

Among persons who eat flexitarian, 42% and 24% are willing to pay up to 10% and 11-20% extra for organics, respectively, while the figure for persons who eat vegetarian is 30% and 31%, respectively, and the figure for people who eat vegan is 25% and 34%, respectively.

Among the green consumer segments, there is thus an increased willingness to pay for organic products, although the maximum level is 20% more than for conventional products.

Attitude to organics among green consumer segments

The four organic principles that form the basis of Organic Denmark's work are: The Health principle, the Ecology principle, the Fairness principle and the Care principle5. In this survey, we have tried to approach the green consumer segments' attitudes to a number of statements that organics embraces. We have also asked about a number of other statements that may be of importance when the green consumer segments make their food purchases, for example local products.

The purpose of this question has been to establish the green consumer segments' attitude to organic values without mentioning organics explicitly. Also with a view to such statements being used by producers to market their organic products, and the same applies to retail chains.

The statements included in the survey are the following:

[5] https://okologi.dk/vi-arbejder-for/vaerdigrundlag/

Figure 4 – Statements

Securing clean groundwater
Avoiding pesticides
Looking after nature and the environment.
Safeguarding biodiversity
Food safety
Animal welfare
Fewer additives
Local products

For each statement, the green consumer segments could mark on a scale from 1 to 5 how important/not important this statement is to them.

The percentage distribution for each statement among the green consumer segments that have responded 'Very important' or 'Important' is shown in Figure 5 below.

Figure 5 – Distribution among green consumer segments

Statements	Percentage distribution	
Securing clean groundwater	Vegan (N=180)	78%
	Vegetarian (N=162)	75%
	Flexitarian (N=63)	57%
Avoiding pesticides	Vegan (N=206)	91%
	Vegetarian (N=201)	92%
	Flexitarian (N=82)	93%
Looking after nature and the environment	Vegan (N=223)	97%
	Vegetarian (N=214)	98%
	Flexitarian (N=86)	98%
Safeguarding biodiversity	Vegan (N=222)	99%
	Vegetarian (N=213)	97%
	Flexitarian (N=83)	96%

Food safety	Vegan (N=199)	88%
	Vegetarian (N=191)	88%
	Flexitarian (N=78)	89%
Animal welfare	Vegan (N=225)	99%
	Vegetarian (N=213)	97%
	Flexitarian (N=83)	97%
Fewer additives	Vegan (N=202)	89%
	Vegetarian (N=197)	90%
	Flexitarian (N=83)	96%
Local products	Vegan (N=194)	84%
	Vegetarian (N=184)	84%
	Flexitarian (N=82)	92%

The green consumer segments state strong support for these statements (57-99%) across the different statements, and the statements can therefore also be regarded as being usable in connection with the promotion of organic (plant-based) products. The statements 'animal welfare', 'safeguarding biodiversity' and 'looking after nature and the environment' rank the highest (96-99%).

The greatest support among persons who eat flexitarian is for the statements 'Looking after nature and the environment' (98%) followed by 'Animal welfare' (97%) and then 'Safeguarding biodiversity' and 'Fewer additives' (96%).

The greatest support among persons who eat vegetarian is for the statements 'Looking after nature and the environment' (98%), followed by 'Animal welfare' and 'Safeguarding biodiversity' (97%).

The greatest support among persons who eat vegan is for the statements 'Animal welfare' and 'Safeguarding biodiversity' (99%), followed by 'Looking after nature and the environment' (97%).

The statement that has the least support across the green consumer segments is 'Securing clean groundwater'. A probable reason for the low support for the statement 'Securing clean groundwater' is that the question does not make sense in a French context or that the green consumer segments are not aware of this connection.

In relation to the statement 'local products', persons who eat flexitarian weight this the highest, while this is not the case for respondents who eat vegetarian and vegan. The fact that respondents who eat vegetarian and vegan do not weight this statement highly can be seen as a plus for Denmark when we want to export organic plant-based foods to France.

Reasons for buying organic products among green consumer segments

We have also listed a number of reasons for buying organic products and asked the green consumer segments to indicate which of these reasons they think are relevant to them. The green consumer segments have thus been free to choose how many reasons they found relevant to them. The figure below shows the breakdown on the various reasons. The extent of support for the various reasons can serve as a benchmark for producers in relation to their communication to the green consumer segments.

Figure 6 – Green consumer segments' reasons for buying organic products

Reasons	Dietary preferences
Organic production protects nature, the environment and groundwater	Vegan (N=188) 81%
	Vegetarian (N=178) 79%
	Flexitarian (N=65) 72%
Organic foods are produced with more care	Vegan (N=40) 17%
	Vegetarian (N=69) 31%
	Flexitarian (N=35) 39%
You avoid pesticides when buying organic foods	Vegan (N=160) 69%
	Vegetarian (N=158) 70%
	Flexitarian (N=69) 76%
Organic food is more climate friendly	Vegan (N=110) 47%
	Vegetarian (N=114) 51%
	Flexitarian (N=46) 51%
Organic foods are healthier	Vegan (N=134) 58%
	Vegetarian (N=131) 56%
	Flexitarian (N=50) 56%
You contribute to better animal welfare when buying organic foods	Vegan (N=75) 32%
	Vegetarian (N=99) 44%
	Flexitarian (N=51) 57%
Organic products taste better	Vegan (N=68) 29%

	Vegetarian (N=48) 21%
	Flexitarian (N=27) 30%

Based on the green consumer segments' attitude to the listed reasons for buying organic products, it becomes clear that the classic reasons 'Organic production protects nature, the environment and groundwater' and 'You avoid pesticides when buying organic foods' are those that rank highest (61-81%). These reasons must consequently still be regarded as relevant to highlight vis-à-vis the green consumer segments when selling organic foods to them.

Across the green consumer segments, there is a particularly high share among persons who eat flexitarian who express support for the listed reasons. This must be regarded as positive for organics, as flexitarians constitute an increasingly large consumer segment.

As only a very small minority of the respondents in the green consumer segments do not buy organic products (4 persons), we have chosen not to look further at the reasons for this, as the analysis will be based on too small a data base.

Why do the green consumer segments eat the way they do?

To obtain a signpost for why the green consumer segments eat the way they do, we have given them an option to state up to three reasons for this. The purpose of this signpost is that it may be important when new products are to be developed and/or introduced in a new market that you as a producer have knowledge of the consumers' reasons for eating the way they do to be able to target the communication or support communication handled by retailers, wholesalers, etc.
The figure below shows the green consumer segments' reasons for eating the way they do.

Figure 7 – Green consumer segments' reasons for eating the way they do.

Reasons	Dietary preferences
Health	Vegan (N=112) 48%
	Vegetarian (N=104) 46%
	Flexitarian (N=51) 57%
Prevention and cure of illness	Vegan (N=24) 10%
	Vegetarian (N=15) 7%
	Flexitarian (N=16) 18%

Animal ethics	Vegan (N=219) 94%
	Vegetarian (N=208) 92%
	Flexitarian (N=71) 79%
Climate/environment/sustainability	Vegan (N=180) 78%
	Vegetarian (N=162) 72%
	Flexitarian (N=54) 60%

As the figure shows, animal ethics is the reason stated by most respondents in the green consumer segments for why they eat the way they do (79-94%). In a clear second place is climate/environment/sustainability (60-78%) for the green consumer segments, while health comes in third place (46-57%). Regarding the 'health' reason, the share is highest among the persons who eat flexitarian.

In the questionnaire, we have also listed the reasons 'religion', 'my family's eating habits' and 'I have always eaten like this'. However, these are not included in the figure, as the number of respondents among the green consumer segments who have chosen these is too low (10-14 persons) to provide a basis for analyses.
Based on our knowledge of the green consumer segments' reasons for eating the way they do, there may be different parameters that producers need to take into account and communicate about, and how their product relates to these reasons.

Labelling schemes

In the survey, we have also asked about the green consumer segments' attitudes towards different types of labelling schemes for vegetarian, vegan and organic foods. The green consumer segments' attitudes, broken down by dietary preferences, are distributed as follows.

Figure 8 – Official vegetarian labelling scheme

Official vegetarian labelling	Very important	Important	Neither nor	Less important	Not important	Don't know	Total
Vegan	21% (N=44)	29% (N=61)	20% (N=41)	9% (N=18)	20% (N=42)	1% (N=3)	100% (N=209)
Vegetarian	35% (N=76)	39% (N=85)	12% (N=27)	8% (N=18)	4% (N=8)	1% (N=3)	100% (N=217)
Flexitarian	36% (N=31)	35% (N=30)	12% (N=10)	7% (N=6)	6% (N=5)	5% (N=4)	100% (N=86)

Across the green consumer segments, the figure is between 50% and 74% in terms of whether the respondents think an official vegetarian labelling scheme is 'Very important' or 'Important'. For persons who eat vegetarian, the figure is not surprisingly highest (74%). For persons who eat vegan, 29% state that such a labelling scheme is 'Less important' or 'Not important', while this only applies to 13% of the flexitarians and 12% of the vegetarians. The reason why persons who eat vegan do not find that an official vegetarian labelling scheme is important may be that this information is not useful to them.

Regarding an official vegan labelling scheme, the green consumer segments' views are shown in the figure below.

Figure 9 – Official vegan labelling scheme

Official vegan labelling	Very important	Important	Neither nor	Less important	Not important	Don't know	Total
Vegan	55% (N=125)	34% (N=77)	4% (N=9)	5% (N=12)	3% (N=)	0% (N=0)	100% (N=229)
Vegetarian	29% (N=63)	40% (N=86)	15% (N=32)	10% (N=22)	4% (N=8)	1% (N=3)	100% (N=214)
Flexitarian	32% (N=27)	35% (N=30)	14% (N=12)	7% (N=6)	6% (N=5)	6% (N=5)	100% (N=85)

Unsurprisingly, 89% of the vegan respondents state that an official vegan labelling scheme is 'Very important' or 'Important' to them. For flexitarians and vegetarians, this figure is 67% and 69%, respectively. Across the green consumer segments, the figure for the respondents who think it is 'Less important' or 'Not important' is between 3-10%. For a national organic labelling scheme, the green consumer segments' views are shown in the figure below.

Figure 10 – National organic labelling scheme

National organic labelling scheme	Very important	Important	Neither nor	Less important	Not important	Don't know	Total
Vegan	36% (N=79)	43% (N=96)	13% (N=28)	4% (N=8)	5% (N=10)	1% (N=0)	100% (N=222)
Vegetarian	41% (N=88)	42% (N=92)	6% (N=14)	6% (N=13)	5% (N=10)	0% (N=0)	100% (N=217)
Flexitarian	42% (N=36)	36% (N=31)	14% (N=12)	3% (N=3)	3% (N=3)	1% (N=1)	100% (N=86)

Regarding a national organic labelling scheme, most vegetarians (83%) think that this is 'Very important' or 'Important', while the figure for respondents who eat vegan and flexitarian is 79% and 78%, respectively. Across the green consumer segments, only 3-6% find it 'Less important' or 'Not important'.

If we look at a European organic labelling scheme, the green consumer segments' views are shown in the figure below.

Figure 11 – European organic labelling scheme

European organic labelling scheme	Very important	Important	Neither nor	Less important	Not important	Don't know	Total
Vegan	29% (N=64)	47% (N=103)	13% (N=28)	6% (N=13)	4% (N=8)	2% (N=5)	100% (N=221)
Vegetarian	32% (N=70)	45% (N=99)	10% (N=22)	6% (N=14)	6% (N=13)	0% (N=1)	100% (N=219)
Flexitarian	36% (N=31)	42% (N=36)	8% (N=7)	5% (N=4)	4% (N=3)	5% (N=4)	100% (N=85)

For respondents who eat flexitarian and vegan, the share is virtually identical relative to a national organic labelling scheme, i.e. around 78%, and while the figure for persons who eat vegetarian is lower (76%).

The share among the green consumer segments who think this is 'Less important' or 'Not important' is also here low (4-6%).

Across the different types of labelling scheme, over 60% of the green consumer segments state that this is something they find 'Important' or 'Very important'.

For persons who eat vegan, there is a stronger demand for veg labelling (vegan) than for organic labelling, while for both persons who eat vegetarian and flexitarian, there is a higher share who find that a national and European organic labelling scheme is 'Very important' or 'Important'. The green consumer segments generally show high support for labelling schemes. This knowledge is useful for export companies if they want to create value and provide guidance for the green consumer segments.

Satisfaction with the range of organic and organic plant-based products

To obtain an insight into the green consumer segments' satisfaction or lack thereof with the range of organic foods and organic plant-based foods, we have asked the respondents about a wide range of product categories.

The results are presented below.

Figure 12 – Organic and plant-based grain, flour and breakfast cereals

Product category grain, flour and breakfast cereals	Very satisfied	Satisfied	Neutral	Unsatisfied	Very unsatisfied	Don't know	I do not buy these products	Total
Vegan	58% (N=126)	25% (N=55)	6% (N=12)	6% (N=13)	0% (N=1)	2% (N=5)	3% (N=6)	100% (N=218)
Vegetarian	45% (N=95)	34% (N=72)	8% (N=16)	5% (N=11)	1% (N=3)	3% (N=7)	2% (N=5)	100% (N=209)
Flexitarian	43% (N=36)	36% (N=30)	8% (N=7)	5% (N=4)	0% (N=0)	1% (N=1)	6% (N=5)	100% (N=83)

Figure 13 – Organic fruit

Fruit	Very satisfied	Satisfied	Neutral	Unsatisfied	Very unsatisfied	Don't know	I do not buy these products	Total
Vegan	33% (N=72)	37% (N=81)	13% (N=28)	10% (N=22)	4% (N=8)	2% (N=4)	1% (N=3)	100% (N=218)
Vegetarian	22% (N=46)	42% (N=88)	16% (N=33)	13% (N=27)	3% (N=7)	3% (N=7)	1% (N=2)	100% (N=210)
Flexitarian	25% (N=21)	40% (N=33)	13% (N=11)	18% (N=15)	1% (N=1)	2% (N=2)	0% (N=0)	100% (N=83)

Figure 14 – Organic vegetables

Vegetables	Very satisfied	Satisfied	Neutral	Unsatisfied	Very unsatisfied	Don't know	I do not buy these products	Total
Vegan	38% (N=82)	36% (N=77)	12% (N=25)	9% (N=20)	3% (N=7)	1% (N=2)	1% (N=3)	100% (N=216)
Vegetarian	25% (N=52)	43% (N=89)	15% (N=32)	10% (N=20)	3% (N=6)	3% (N=7)	1% (N=2)	100% (N=208)
Flexitarian	28% (N=23)	43% (N=35)	13% (N=11)	16% (N=13)	0% (N=0)	2% (N=2)	0% (N=0)	100% (N=82)

Figure 15 – Organic plant-based breads and cakes

Plant-based breads and cakes	Very satisfied	Satisfied	Neutral	Unsatisfied	Very unsatisfied	Don't know	I do not buy these products	Total
Vegan	25% (N=55)	28% (N=61)	17% (N=37)	15% (N=32)	2% (N=4)	2% (N=5)	11% (N=23)	100% (N=217)
Vegetarian	26% (N=54)	31% (N=66)	20% (N=43)	10% (N=20)	4% (N=8)	4% (N=9)	5% (N=10)	100% (N=210)
Flexitarian	22% (N=18)	33% (N=27)	24% (N=20)	6% (N=5)	4% (N=3)	2% (N=2)	10% (N=8)	100% (N=83)

Figure 16 – Organic plant-based beverages and alternatives to dairy products

Plant-based beverages and alternatives to dairy products	Very satisfied	Satisfied	Neutral	Unsatisfied	Very unsatisfied	Don't know	I do not buy these products	Total
Vegan	39% (N=86)	35% (N=76)	21% (N=18)	9% (N=20)	3% (N=7)	2% (N=4)	4% (N=25)	100% (N=218)
Vegetarian	32% (N=68)	34% (N=71)	22% (N=27)	9% (N=19)	2% (N=5)	3% (N=7)	18% (N=0)	100% (N=210)
Flexitarian	30% (N=22)	45% (N=33)	13% (N=67)	3% (N=2)	3% (N=2)	1% (N=1)	11% (N=3)	100% (N=73)

Figure 17 – Organic beans and lentils

Beans and lentils	Very satisfied	Satisfied	Neutral	Unsatisfied	Very unsatisfied	Don't know	I do not buy these products	Total
Vegan	52% (N=114)	29% (N=63)	8% (N=17)	6% (N=13)	0% (N=1)	1% (N=3)	3% (N=7)	100% (N=218)
Vegetarian	42% (N=89)	32% (N=68)	12% (N=26)	6% (N=12)	1% (N=2)	4% (N=8)	1% (N=3)	100% (N=210)
Flexitarian	37% (N=31)	37% (N=31)	11% (N=9)	7% (N=6)	0% (N=0)	2% (N=2)	5% (N=4)	100% (N=83)

Figure 18 – Organically processed products as alternatives to meat

Plant-based alternatives to meat	Very satisfied	Satisfied	Neutral	Unsatisfied	Very unsatisfied	Don't know	I do not buy these products	Total
Vegan	20% (N=43)	32% (N=69)	16% (N=34)	15% (N=33)	4% (N=9)	2% (N=4)	10% (N=22)	100% (N=214)
Vegetarian	19% (N=40)	33% (N=70)	16% (N=34)	13% (N=27)	4% (N=9)	4% (N=8)	10% (N=22)	100% (N=210)
Flexitarian	18% (N=15)	39% (N=33)	13% (N=11)	14% (N=12)	0% (N=0)	2% (N=2)	13% (N=11)	100% (N=84)

Figure 19 – Organic plant-based toppings

Plant-based toppings	Very satisfied	Satisfied	Neutral	Unsatisfied	Very unsatisfied	Don't know	I do not buy these products	Total
Vegan	3% (N=7)	8% (N=17)	9% (N=18)	8% (N=17)	3% (N=7)	3% (N=6)	65% (N=134)	100% (N=206)
Vegetarian	1% (N=3)	7% (N=15)	6% (N=12)	3% (N=7)	1% (N=2)	3% (N=7)	78% (N=159)	100% (N=205)
Flexitarian	5% (N=4)	11% (N=9)	4% (N=3)	5% (N=4)	1% (N=1)	0% (N=0)	73% (N=58)	100% (N=79)

Figure 20 – Organic tofu, seitan and tempeh

Tofu, seitan, tempeh	Very satisfied	Satisfied	Neutral	Unsatisfied	Very unsatisfied	Don't know	I do not buy these products	Total
Vegan	43% (N=92)	32% (N=69)	10% (N=21)	8% (N=18)	3% (N=7)	1% (N=2)	3% (N=7)	100% (N=216)
Vegetarian	29% (N=56)	42% (N=80)	10% (N=19)	8% (N=16)	3% (N=6)	5% (N=9)	10% (N=20)	100% (N=192)
Flexitarian	30% (N=24)	40% (N=32)	7% (N=6)	6% (N=5)	2% (N=2)	0% (N=0)	15% (N=12)	100% (N=81)

Figure 21 – Organic plant-based ready meals

Ready meals	Very satisfied	Satisfied	Neutral	Unsatisfied	Very unsatisfied	Don't know	I do not buy these products	Total
Vegan	9% (N=20)	19% (N=40)	17% (N=36)	7% (N=15)	2% (N=4)	3% (N=6)	43% (N=93)	100% (N=214)
Vegetarian	10% (N=20)	23% (N=49)	13% (N=27)	6% (N=13)	1% (N=3)	3% (N=7)	43% (N=91)	100% (N=210)
Flexitarian	11% (N=9)	21% (N=18)	11% (N=9)	5% (N=4)	2% (N=2)	0% (N=0)	50% (N=42)	100% (N=84)

The green consumer segments in France express a predominant satisfaction ('Very satisfied' or 'Satisfied') with the organic plant-based range. However, 'Organic plant-based toppings' (65-78%) and 'Organic plant-based ready meals' (43-50%) stand out markedly by the green consumer segments stating that they do not buy these products. A possible explanation for this may be 1) that there is currently no availability, 2) that the formulation in our questionnaire does not adequately capture these product categories and/or 3) that the food culture is different in France.

When supermarkets mention that they offer what consumers demand, a possible response to this could be that the consumers may find it difficult to demand products that they do not know exist and that can meet an unmapped need or a need that is better linked to their attitudes to foods. So when the green consumer segments state that they do not buy these products, this may, as mentioned, be connected with the supply (and of the right quality) not being available at the present time.

In addition, the satisfaction for 'Organic processed products as alternatives to meat' (52-57%) and 'Organic plant-based breads and cakes' (53-57%) has a satisfaction rate in the 50s, which indicates that there could also be an improvement potential here.

A survey based on visits to French supermarkets can presumably help map the export opportunities for Danish products in 'Organic plant-based toppings', 'Organic plant-based ready meals' and 'Organic processed products as alternatives to meat' as well as 'Organic plant-based breads and cakes'.

Quality of processed plant-based foods

Our hypothesis is that the more widespread plant-based products become, the more consumers will demand a higher quality, which may concern, among other aspects, the degree of processing of the products. We therefore asked the green consumer segments about the following:

'How important is it for you that processed plant-based foods are as natural and as little processed as possible?'

Figure 22 – Attitudes to degree of processing of plant-based foods

How important is it that plant-based foods are as natural and gently processed as possible?	Very important	Important	Neither nor	Less important	Not important	Total
Vegan	51% (N=113)	37% (N=81)	6% (N=13)	5% (N=11)	1% (N=3)	100% (N=221)
Vegetarian	54% (N=115)	35% (N=74)	5% (N=10)	3% (N=7)	2% (N=5)	100% (N=212)
Flexitarian	55% (N=42)	42% (N=32)	3% (N=2)	1% (N=1)	0% (N=0)	100% (N=77)

As an overall group, 90% in the green consumer segment find it 'Very important' or 'Important' that plant-based foods are as natural and as little processed as possible. In the green consumer segment, between 88-97% find it 'Very important' or 'Important' that plant-based foods are as natural and as little processed as possible. This is consequently something that the green consumer segments find important when buying plant-based foods, which is also in line with organic foods often being less processed. It may be useful information for food producers in relation to communication about plant-based products that this is also an important parameter for the green consumer segments when they buy foods.

Green consumer segments' shopping places

When we want to export more organic plant-based products to the green consumer segments in France, it is relevant to look at where these consumer segments make their purchases and at what frequency. This is shown in the figure below.

Figure 23 – Green consumer segments' shopping places

Discount supermarkets	**Daily**	**Weekly**	**Monthly**	**Almost never**	**Never**	**Total**
Vegan	0% (N=0)	10% (N=21)	16% (N=35)	30% (N=65)	45% (N=98)	100% (N=219)
Vegetarian	1% (N=2)	11% (N=22)	12% (N=25)	34% (N=70)	42% (N=86)	100% (N=205)
Flexitarian	0% (N=0)	11% (N=9)	15% (N=12)	23% (N=19)	51% (N=41)	100% (N=81)
Supermarkets	**Daily**	**Weekly**	**Monthly**	**Almost never**	**Never**	**Total**
Vegan	3% (N=7)	48% (N=107)	23% (N=50)	19% (N=42)	7% (N=15)	100% (N=221)
Vegetarian	2% (N=5)	54% (N=113)	26% (N=55)	14% (N=30)	3% (N=7)	100% (N=210)
Flexitarian	2% (N=2)	57% (N=47)	20% (N=16)	17% (N=14)	4% (N=3)	100% (N=82)
Specialty stores	**Daily**	**Weekly**	**Monthly**	**Almost never**	**Never**	**Total**
Vegan	5% (N=10)	59% (N=132)	28% (N=63)	6% (N=13)	2% (N=4)	100% (N=222)
Vegetarian	4% (N=8)	57% (N=122)	23% (N=49)	14% (N=29)	3% (N=6)	100% (N=214)
Flexitarian	4% (N=3)	47% (N=40)	31% (N=26)	9% (N=8)	9% (N=8)	100% (N=85)
Online	**Daily**	**Weekly**	**Monthly**	**Almost never**	**Never**	**Total**
Vegan	0% (N=0)	4% (N=8)	24% (N=51)	36% (N=77)	37% (N=79)	100% (N=215)
Vegetarian	1% (N=2)	2% (N=5)	14% (N=30)	35% (N=73)	47% (N=97)	100% (N=207)
Flexitarian	0% (N=0)	6% (N=5)	14% (N=11)	19% (N=15)	61% (N=49)	100% (N=80)

Around half of the green consumer segments state that they shop in supermarkets and speciality stores weekly (47-59%), while this figure is only 10-11% for discount supermarkets. Over 70% of green consumer segments state that they 'almost never' or 'never' shop online. For persons who eat flexitarian, most of the respondents shop weekly in supermarkets (57%), while this concerns speciality stores for persons who eat vegetarian (57%) and vegan (59%).

As we have not given examples of discount supermarkets and supermarkets in the survey, it may be that a discount supermarket is regarded as a supermarket by some respondents in the green consumer segments, while the same store is experienced as a discount supermarket by others. However, the figure shows that the green consumers segments shop primarily in supermarkets and specialty stores, and it would therefore make sense initially to concentrate export initiatives on supermarkets and specialty stores, respectively.

Methodology and reflections

The data collection was done in collaboration with Association végétarienne de France in France in the period from 25 July to 22 August 2022. A total of 555 responses were collected. As the questionnaire survey was conducted among consumers with a relation to Association végétarienne de France, these consumers will probably be consumers with a very high commitment, which may constitute a bias in the survey.

Below, it is shown how the demographic factors are distributed on dietary preferences as well as dietary preferences crossed with gender and age.

Figure 24 – Dietary preferences

Dietary preferences	Number	Percentage distribution
I eat vegan[6]	232	42%
I eat vegetarian[7]	225	41%
I eat vegetarian supplemented with fish[8]	65	12%
I eat meat and/or fish up to 2-3 days a week[9]	26	5%
I eat meat and/or fish 4-5 days a week[10]	3	1%
I eat meat and/or fish 6-7 days a week[11]	4	1%
Total	**555**	**100%**

In the analysis, we have divided the respondents into the following groups:

Persons who eat vegan
Persons who eat vegetarian
Persons who eat flexitarian (this category includes the persons who have responded that they eat vegetarian supplemented with fish as well as persons who eat meat and/or fish up to 2-3 days a week.)
Persons who eat meat (the persons who have responded that they eat meat and/or fish 4-5 days or 6-7 days a week), a total of 124 persons, have been excluded from the analysis, as the group is very small and we want to focus on the persons who eat vegan, vegetarian and flexitarian.

In the analysis, the collective term 'green consumer segments' is used to refer to the respondents who eat flexitarian, vegetarian or vegan, respectively. In total, this group consists of 548 respondents.

[6] Wording in the questionnaire: Je suis végétalien·ne - Je ne mange aucun produit d'origine animale
[7] Wording in the questionnaire: Je suis végétarien·ne - Je ne mange pas de viande ni de poisson
[8] Wording in the questionnaire: Je suis pesco-végétarien·ne - Je ne mange pas de viande mais je mange du poisson
[9] Wording in the questionnaire: Je mange de la viande et/ou du poisson 2 à 3 jours par semaine

[10] Wording in the questionnaire: Je mange de la viande et/ou du poisson 4 à 5 jours par semaine
[11] Wording in the questionnaire: Je mange de la viande et/ou du poisson 6-7 jours par semaine

As the respondents have not answered all the questions in the survey (we have chosen to make some of the questions optional), the total number of respondents who have answered each question will vary. However, the number will be shown in each figure. Only the green consumer segments will be included in Figures 17 and 18 – see below.

Figure 25 – Dietary preferences and gender

Dietary preferences	Woman	Man	Non-binary	Total
Vegan	74% (N=172)	24% (N=55)	2% (N=5)	100% (N=232)
Vegetarian	77% (N=173)	22% (N=50)	1% (N=2)	100% (N=225)
Flexitarian	84% (N=76)	16% (N=15)		100% (N=91)
Total	77% (N=421)	22% (N=120)	1% (N=7)	100% (N=548)

Figure 26 – Dietary preferences and age[12]

Dietary preferences	13-34 years	35-55 years	Over 55 years	Total
Vegan	22% (N=51)	44% (N=103)	34% (N=78)	100% (N=232)
Vegetarian	20% (N=44)	40% (N=89)	41% (N=92)	100% (N=225)
Flexitarian	16% (N=15)	33% (N=30)	51% (N=46)	100% (N=90)
Total	20% (N=110)	41% (N=222)	39% (N=216)	100% (N=548)

If we compare the size of the group of flexitarians in our survey with the number of flexitarians in the EU project Smart Protein, where 27%13 of consumers state that they eat flexitarian (defined as 'I sometimes eat meat, but I am trying to reduce my meat consumption and often choose plant-based foods instead'), the figure in our survey is 10 percentage points lower (17%). However, this can probably be attributed to the use of a broad definition of flexitarians in the Smart Protein project as opposed to our survey, in which we ask more directly about how many meals they eat weekly that contain meat. In the Smart Protein project, the share of vegetarians and vegans is 6%,14, whereas they make up 41% (vegetarians) and 42% (vegans), respectively, in our survey. In the current survey, however, we have been interested in obtaining the green consumer segments' attitudes towards organic plant-based products and especially vegans and vegetarians, as these are often among the first to try and buy new plant-based products and they often work actively to get more plant-based products on the shelves. Of the total volume, they still buy a significant quantity of these products.

[12] The youngest respondent is 23 years old.
[13] https://proveg.com/wp-content/uploads/2021/11/FINAL_Pan-EU-consumer-survey_Country-Specific-Insights-2.pdf
[14] https://proveg.com/wp-content/uploads/2021/11/FINAL_Pan-EU-consumer-survey_Country-Specific-Insights-2.pdf

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