

Demand for organic plant-based foods in the Netherlands, France, Germany and Portugal

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Introduction

This cross-national summary contains a comparison across the four countries for which we have conducted our four consumer surveys. These countries are the Netherlands, France, Germany and Portugal.

All four surveys have been conducted with deliberately selective segments of flexitarians, vegetarians and vegans – which are not representative of the general population. In turn, the consumer surveys represent in-depth data on the preferences of those consumers who buy the vast majority of plant-based foods.

In this cross-national summary, we primarily look at the three groups – flexitarians, vegetarians and vegans – together, using the term ‘the green consumer segment’.

In addition, the summary will also only contain a selection of the variables/questions presented in each inspirational paper, and we therefore refer to the inspirational paper for each country if greater knowledge about a specific country is needed.

The variables/questions included in this cross-national summary are:

- Number of responses
- Distribution according to dietary preferences
- Gender
- Age
- Organics share
- Willingness to pay
- Degree of processing

Number of responses within the green consumer segment, broken down on the four countries

The Netherlands	France	Germany	Portugal
1,790	548	393	494

Dietary preferences within the green consumer segment, broken down on the four countries

Dietary preference	The Netherlands	France	Germany	Portugal
Vegan	50%	42%	14%	33%
Vegetarian	31%	41%	30%	30%
Flexitarian	19%	19%	56%	37%

Gender distribution within the green consumer segment, broken down on the four countries

Gender	The Netherlands	France	Germany	Portugal
Women	81%	77%	48%	84%
Men	16%	22%	50%	15%
Binary	3%	1%	2%	1%

Age distribution within the green consumer segment, broken down on the four countries

Age	The Netherlands	France	Germany	Portugal
13-34-year-olds	28% ¹	20% ²	82% ³	46% ⁴

¹ The youngest respondent is 13 years old.

² The youngest respondent is 23 years old.

³ The youngest respondent is 16 years old.

⁴ The youngest respondent among the green consumer segments is 17 years old.

35-55-year-olds	47%	41%	16%	46%
Over 55 years	25%	39%	2%	8%

Organics shares within the green consumer segment, broken down on the four countries

Organics share	The Netherlands	France	Germany	Portugal
Minimum 20%	74%	92%	89%	77%
60-100%	33%	64%	26%	33%

Willingness to pay for organics within the green consumer segment, broken down on the four countries

Willingness to pay	The Netherlands	France	Germany	Portugal
Up to 10%	32%	31%	28%	37%
10-20%	34%	32%	24%	32%
Do not want to pay more	7%	6%	1%	10%

Attitudes to the degree of processing of plant-based foods within the green consumer segment, broken down on the four countries

Degree of processing	The Netherlands	France	Germany	Portugal
'Very important' and 'Important'	61%	90%	44%	95%

Attitudes to labelling schemes (vegetarian, vegan, national organic, European organic) within the green consumer segment, broken down on the four countries

Labelling schemes	The Netherlands	France	Germany	Portugal
'Very important' and 'Important'	Just under 50%	Over 60%	28-62%	65-97%