Plantebaseret Videnscenter

ØKOLOGISK LANDSFORENING

Dansk Vegetarisk Forening

Organic and Plant-Based Preferences Among Consumers in Sweden

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Content

Introduction

This inspirational paper intends to present the preferences of the Swedish population within organic and plant-based foods. The term 'the green consumer segments' will be used for the two segments that have a vegetarian or flexitarian diet.

The inspirational paper is to be used as a starting point for dialogue with buyers in Sweden and to prepare the Danish organic plant-based producers for export to the Swedish market. The purpose of the inspirational paper is thus two-sided. The paper aims to help increase the level of knowledge about the Swedish consumers in general.

The inspirational paper is based on 514 respondents between the ages of 18 to 75 years old. See below figures of the respondents' demographic profiles. The data was collected by Norstat between the 22nd of June to 26th of June 2023.

Demographic features of the respondents in the survey

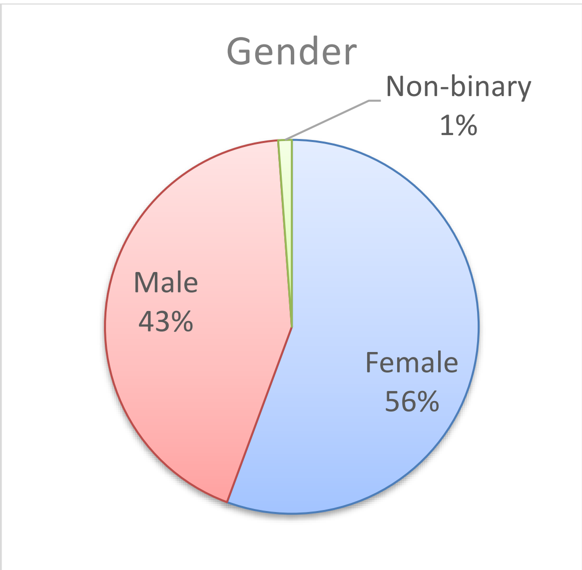


Figure 1

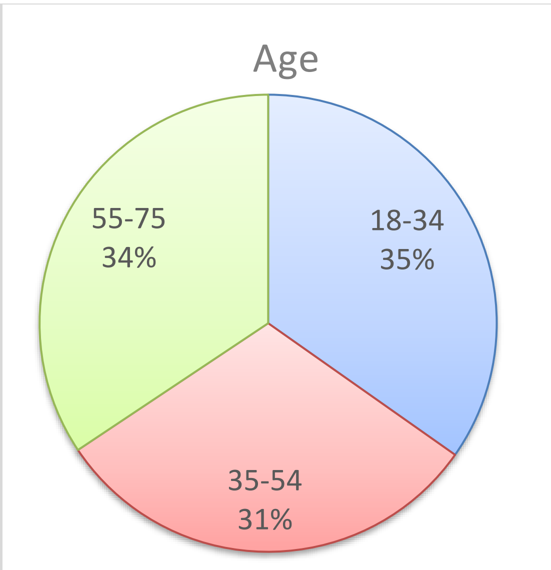


Figure 2

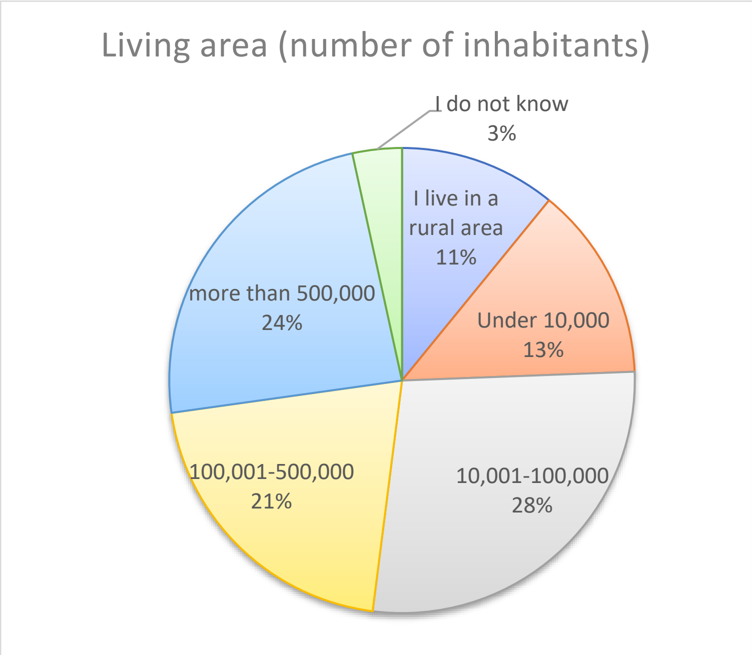
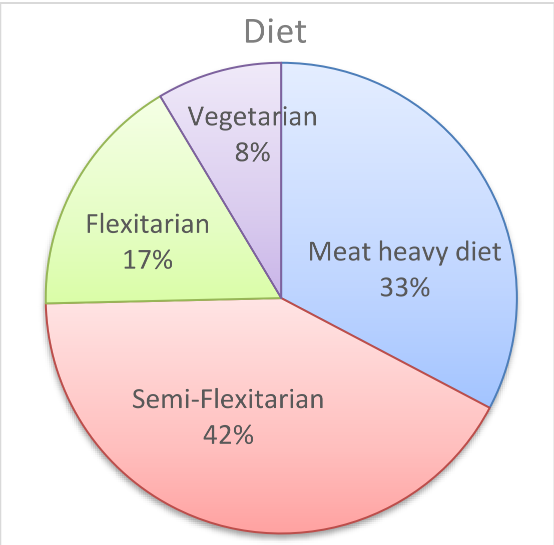


Figure 3



Definitions of diets:
Vegetarian = Only eat vegetarian lunches and dinners
Flexitarian = Eat 8 to 13 vegetarian meals per week
Semi-flexitarian = Eat 3 to 7 vegetarian meals per week
Meat heavy diet = Eat 0 to 2 vegetarian meals per week

Figure 4

Characteristics of the green consumer segment for Sweden includes more women (70% women vs. 30% men) and more younger people (41% between 18-34 vs. 30% between 35-54 and 29% between 55-75). But other than that, it is evenly distributed among living areas, singles vs couples and with or without children.

Results and conclusions

72% of the respondents wish to eat more organic plant-based food in the future (Fig. 6). Even 52% of the Swedes with a meat heavy diet wish to eat more organic plant-based food in the future. The Swedes eat 5,5 plant-based meals during a week on average, which is two meals more than the average of the Danes. Only 7% of the respondents do not buy organic food now, which also reflects that Sweden had the fifth highest organic market share in the World in 2021 (FiBL 2023).

Taste (93%) and price (73%) are the most important factors among several priorities when buying food. Thirdly comes animal welfare (71%), which is interesting, since the survey is representative of the Swedish population. It must indicate that animal welfare means a lot to the Swedish consumers. The respondents might not know the organic food principles and values completely, since organic food is ranked second lowest (35% finds it important), but the practices with organic production are given more importance, such as animal welfare (71%), securing clean groundwater (60%) and avoiding pesticides (55%) (Fig. 8).

61% of the respondents sometimes buy processed plant-based foods. Younger consumers, respondents living in bigger cities or people eating less meat are more likely to sometimes buy processed plant-based food (Fig. 9 to 11). Also, the respondents who sometimes buy processed plant-based foods give higher importance to organic products than people who do not buy processed plant-based food. The survey further shows that the more plant-based the respondents eat, the more organic food they say they buy (Fig. 16). The two main reasons for not buying more processed plant-based foods are because of bad taste or texture and because it is too expensive (Fig 12). The main reason for not buying more organic food is that it is too expensive (66%) and secondly that there is a limited selection of organic products (38%) (Fig. 21). The selection of organic plant-based product groups is mostly unsatisfactory in the categories: "plant-based ready meals", "Bread, cakes, bakery etc." and "plant-based meat" (Fig. 22).

The respondents are generally positive towards many plant-based ingredients, but chickpeas and lentils are some of the lesser-known legumes for the Swedes with a heavy meat diet. Soy has a low score, even lower than salt, which can be a challenge for plant-based products containing soy (Fig. 13).

Vegetables and fruits are the plant-based food groups with the highest organic shares. Plant-based ready meals and bread, cakes and bakery are the groups that have the lowest organic shares (Fig. 18).

72% of the respondents are willing to pay more for organic plant-based products, but 54% of the ones who are willing to pay more, are only willing to pay a little more (Fig. 20), which can be a challenge for organic plant-based products that tend to be more expensive to their counterpart.

The main reason why people eat the way they do is because of health and secondly because of habit. The reasons vary widely between the groups with different diets e.g., animal ethics are the highest ranked reason for vegetarians (Fig. 23).

Among the Swedish respondents we see that a vegetarian label is more valuable than a vegan label. It is only respondents with a vegetarian/vegan diet, that prefers a vegan label over a vegetarian label. We also see that a national organic label is slightly favored compared to a European organic label (Fig. 25).

Recommendations

There could be an opportunity for Danish companies to export organic plant-based products to Sweden because the Swedes already eat much more plant-based than Danes, 72% of the Swedish respondents want to eat more organic plant-based food (52% of the ones eating a meat heavy diet) and 38% stated that the reason not buying organic products is because there is a limited selection.

Many of the challenges that organic plant-based producers face towards the Danish consumers are equivalent to the Swedish consumer, e.g. taste and price are the key factors when buying food. So, if you have cracked the key to success in Denmark, you might be able to transfer your key selling points to the Swedish market.

Targeting the younger generations and people living in the bigger cities has potential to reach the biggest present market. Also, there is a clear positive connection between organic and plant-based eating, so entering the Swedish market with an organic plant-based product could set you apart from the competitors.

Knowledge about the meaning of the organic label is lacking in Sweden, as it is in many other countries. The survey shows that the respondents seem to have a more holistic view around organic food and organic production, rather than seeing organic food improving specific factors. It can be difficult and illegal to promote your product holistically such as “better for the environment” or “improved climate footprint”, so when highlighting your product is organic, then think of promoting some of the key features of organic production, e.g. animal welfare, securing clean groundwater or avoiding pesticides:

One of the most impactful focus areas could be to focus on the improved animal welfare of an organic plant-based food production when selling to the consumers in Sweden, as animal welfare was the third most important factor when buying food. A plant-based product is reducing the negative impact on other animals, both directly, but also indirectly via the improved biodiversity.

The selection of organic plant-based products is especially limited in plant-based ready meals, bakery products and plant-based meat. Entering the plant-based dairy market can be challenging, as this has the highest satisfaction level among the respondents and Oatly is a dominant player in the market.

The Swedish consumers are positive about many different plant-based ingredients, but potato is ranked highest, and soy is the least favorable, so promoting potato protein in your product could set a competitive advantage, whilst a product containing soy needs a different framing, where you might need to highlight the nutritional values of soy or the origin of the organic soy. Products made of lentil and chickpeas could need some extra nursing to the consumer with a meat heavy diet, to make sure they know what it is and how to use it.

There seems to be a barrier of eating habits among the Swedish consumers, which could be a barrier to be tackled in your marketing strategy. This challenge is also present in Denmark, so here you might be able to use your preexisting knowledge. Health is also the leading factor for many to eat the way they do. Though health claims can be difficult to promote due to law and regulations in Sweden.

The results of the survey in detail

The Swedish population is eating more plant-based than the Danish consumers on average. The average number of vegetarian meals per week per respondent in this survey was 5,3 meals. Danes only eat 3,3 vegetarian meals per week on average (Source: COOP & DVF 2022). You also see in fig 5 the comparison of eating habits between Swedes and Danes.

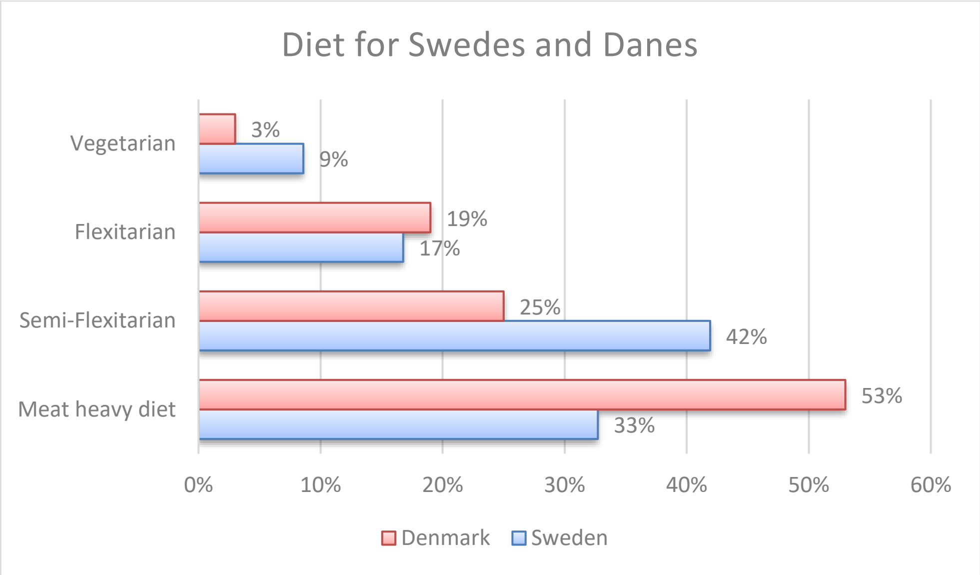


Figure 5

Even with a higher consumption of plant-based meals, 72% of the Swedish respondents want to eat more organic plant-based food in the future. This is an indication that Sweden is an attractive market for producers of organic plant-based food.

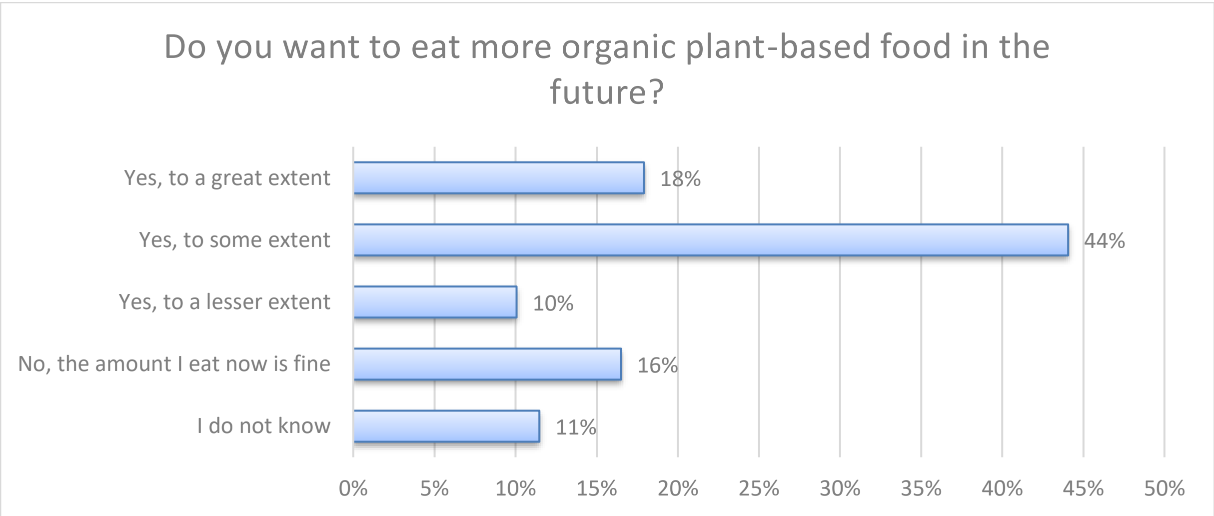


Figure 6

Even 52% of the respondents with a meat heavy diet say that they want to eat more organic plant-based food in the future. Also, the more plant-based you are eating, the more willingness is there to eat more organic plant-based food in the future. It is almost like an electric escalator; once you start eating more plant-based food, you want to eat more organic plant-based food in the future.

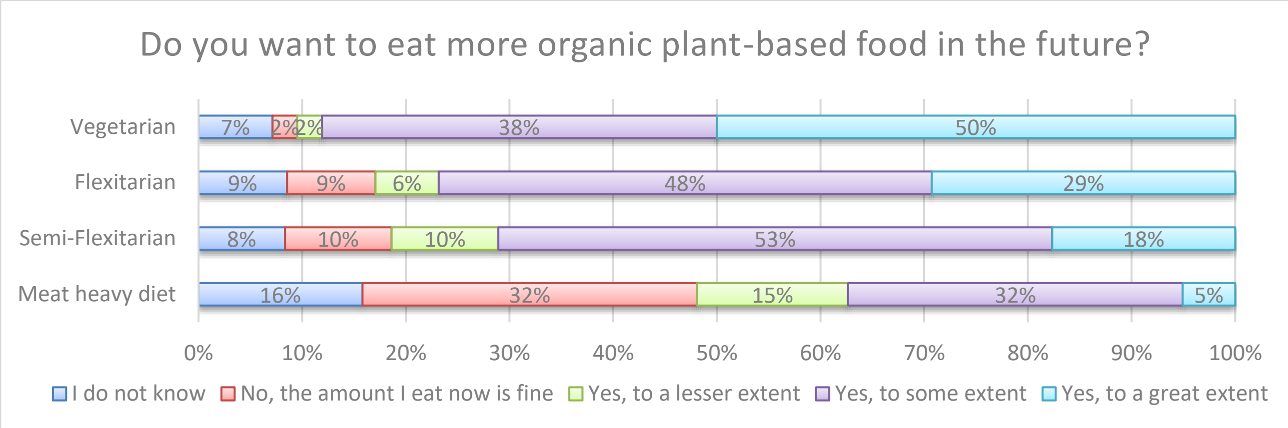


Figure 7

Taste and price are the most important factors when purchasing food. Thirdly comes animal welfare, which is interesting, since the survey is representative of the Swedish population. The Swedish population must have a high desire to take good care of animals. 35% of the respondents think organic products are important, while giving higher importance to securing clean groundwater (60%), avoiding pesticides (55%), the environment (54%), and avoiding additives (49%), which are all factors within the organic concept together with better animal welfare. It seems that the respondents are not aware of what the organic label means. Therefore, an organic claim on products by itself might not be adding enough value for customers, but there need to be mentioned elements of organic production as well. Biodiversity is important for 34%, which goes in contrast to 71% that thinks animal welfare is important. None of the factors have received a high share of “not important”.

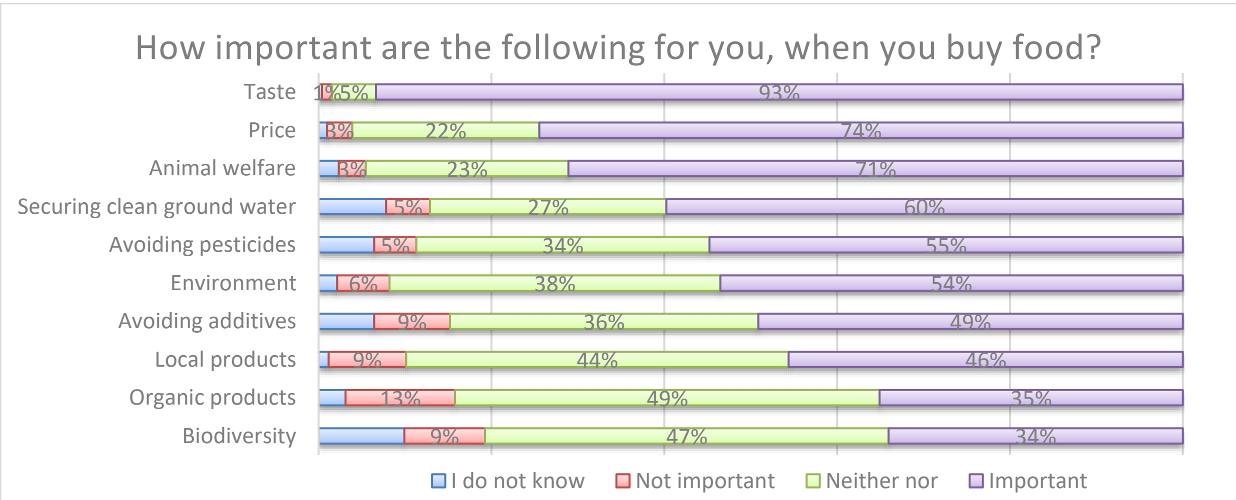


Figure 8

61% of the respondents say they sometimes buy processed plant-based foods. The amount of younger people who sometimes buy processed plant-based foods are higher than the older generations (Figure 9). We can also see that processed plant-based food is bought more often for respondents living in bigger cities compared to the ones living in rural areas (Figure 10). We also see a very clear picture that the less meat you eat, the more people sometimes buy processed plant-based foods (Figure 11). There is no significant difference between men and women buying processed plant-based foods (graph not shown).

Do you sometimes buy processed plant-based foods?

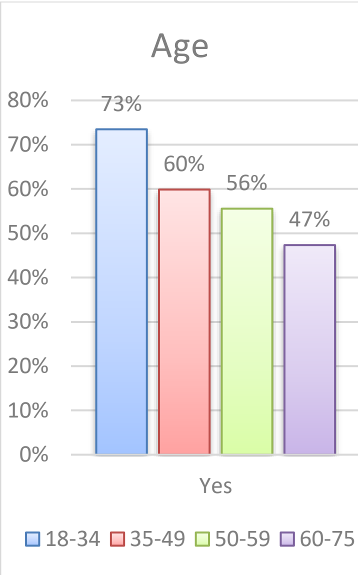


Figure 9

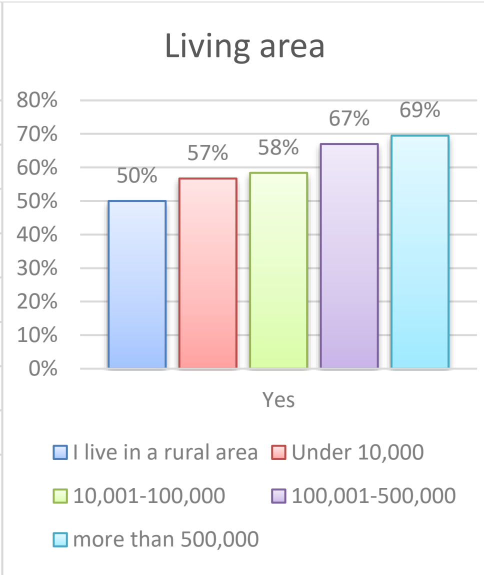


Figure 10

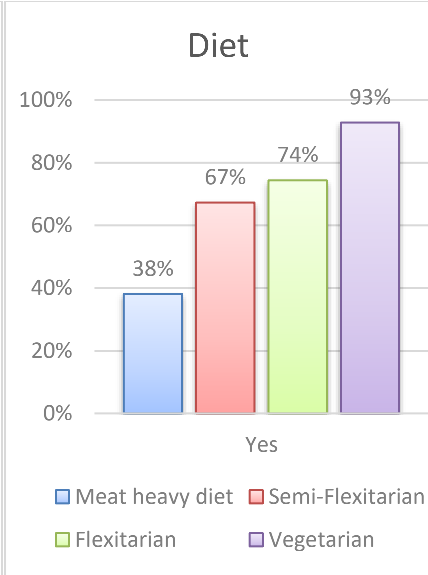


Figure 11

The two main reasons for not buying more processed plant-based foods are very connected to the reasons for buying food as we say in figure 8, which is because of bad taste or texture and because it is too expensive. There are many reasons receiving 10-20% of the votes, where poor quality and unknown ingredients are the most mentioned. The reason “not enough organic products” are the lowest scoring factor, which could indicate that people find the selection sufficient. However, it might be that the Swedish respondents do not think it is possible to have processed organic plant-based products, as we later see, that 38% of the respondents

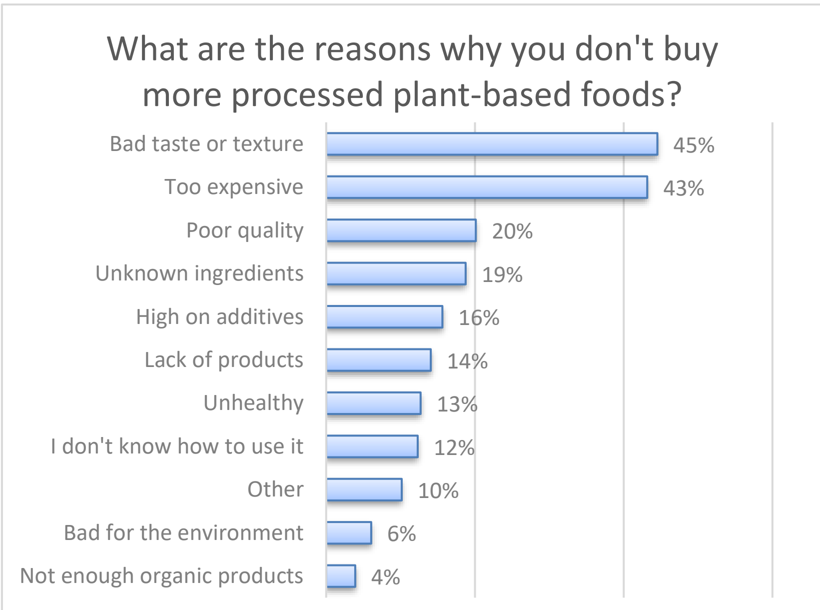


Figure 12

believe there is a limited selection of organic products (Figure 12). Having this in mind, together with the answers that there is a lack of processed plant-based products that have good quality, taste, texture and are affordable, then there is an opportunity for organic plant-based products.

The attitudes towards the ingredients are mostly positive (figure 13). Most people have positive attitudes towards potatoes followed by nuts. Peas and beans are the highest ranked legumes. Chickpeas and lentils have the highest number of people responding: "don't know", which could indicate that these ingredients are not so known or used in the Swedish eating culture. Soy has only received 35% positive answers and 16% negative answers, which is 5%-points more than salt. So, the Swedish respondents prefer salt over soy, which places soy as a less popular ingredient. If companies use soy in their organic plant-based products, it might be worth highlighting the nutritional values of soy, the origin of the organic soy or other to tackle the general public's views on soy.

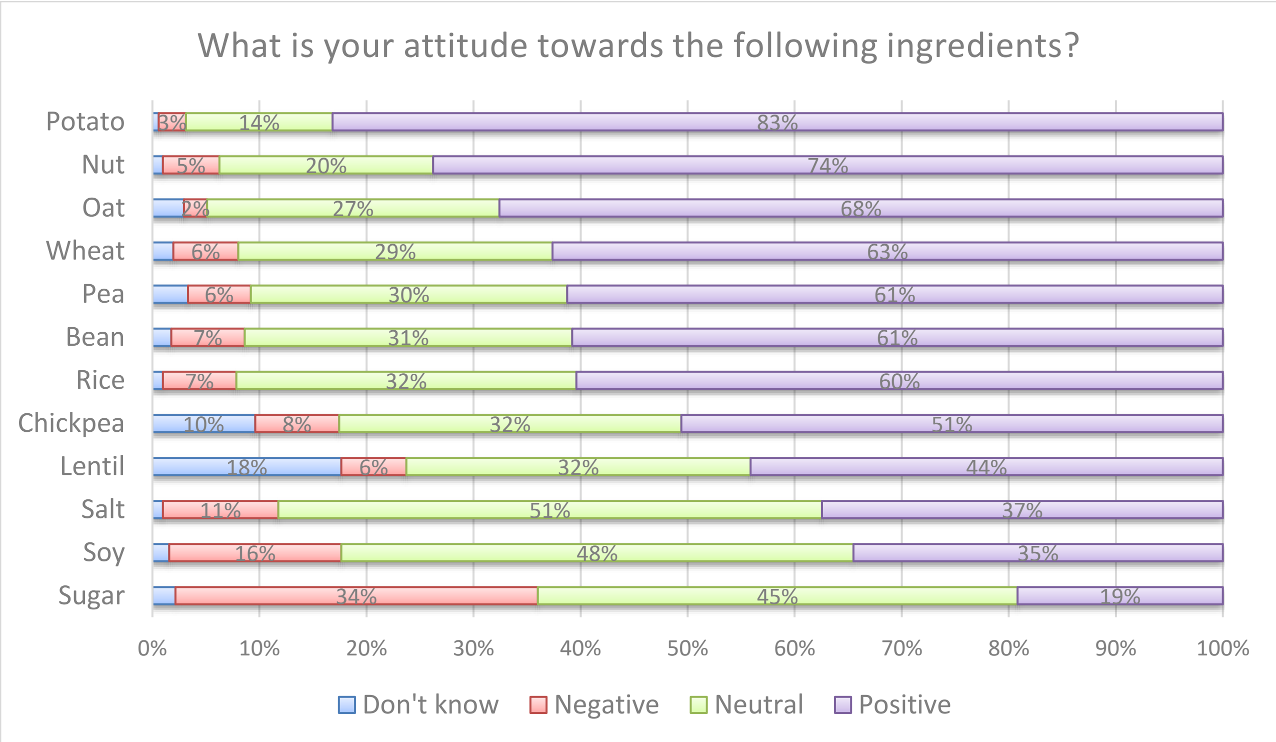


Figure 13

We generally see that the green consumer segment has more positive attitudes towards the different ingredients than the ones with a semi-flexitarian or meat heavy diet. This is shown below in figure 14 for chickpeas, lentils and soy. We also see that twice as many respondents don't know what their attitude towards chickpea or lentil is, which suggests that the more plant-based you eat, the more you know the ingredients.

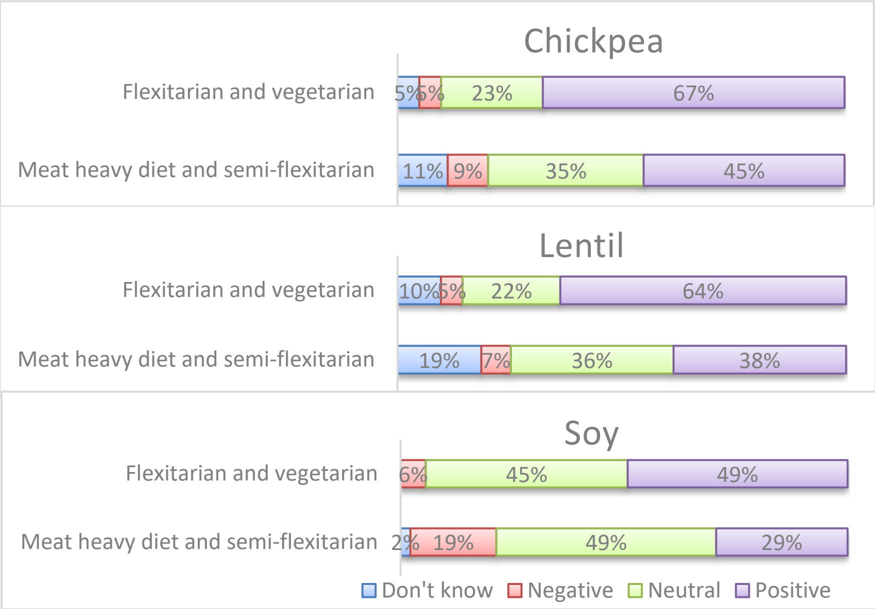


Figure 14

Sweden had the fifth highest organic market share in the World in 2021 (8,9%) and Denmark had the highest (12,8%) (FiBL 2023). Figure 15 shows the Swedes' self-reported organic share from this survey in blue compared to the Danes organic shares in red from a recent study (COOP & DVF, 2022). Note the Danish numbers are from 2022 and have gone slightly down in 2023 (Økologisk landsrapport 2023). We can see that the Danish and Swedish consumers are close to each other.

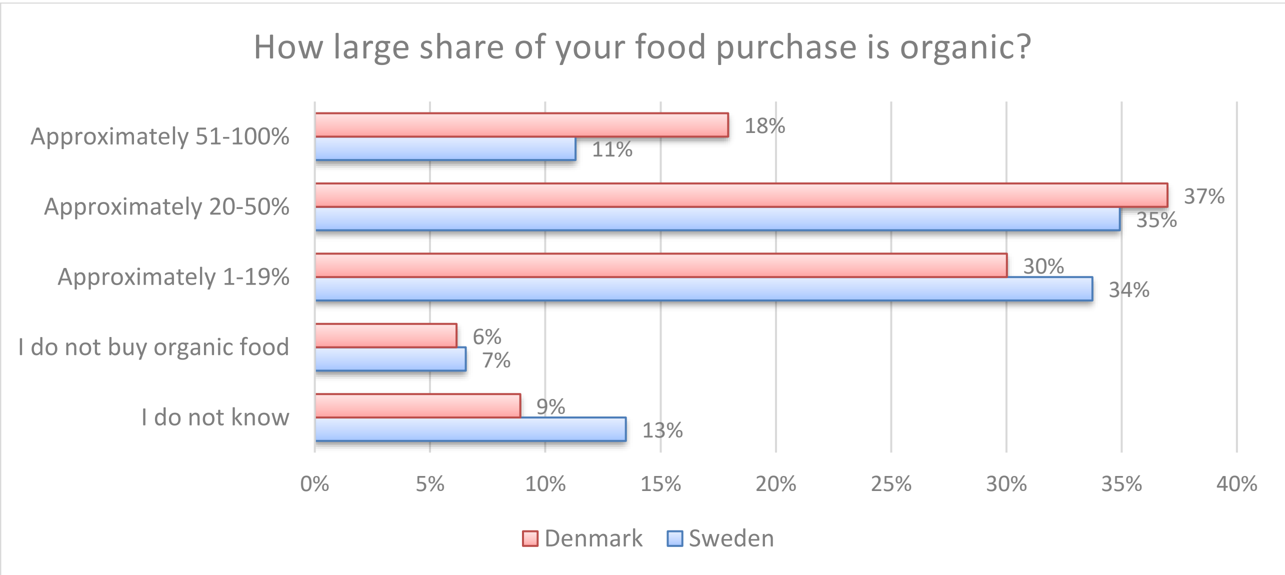


Figure 15

When we dive into our data from Sweden, we find that the more plant-based the respondents eat, the more they buy organic food (Figure 16).

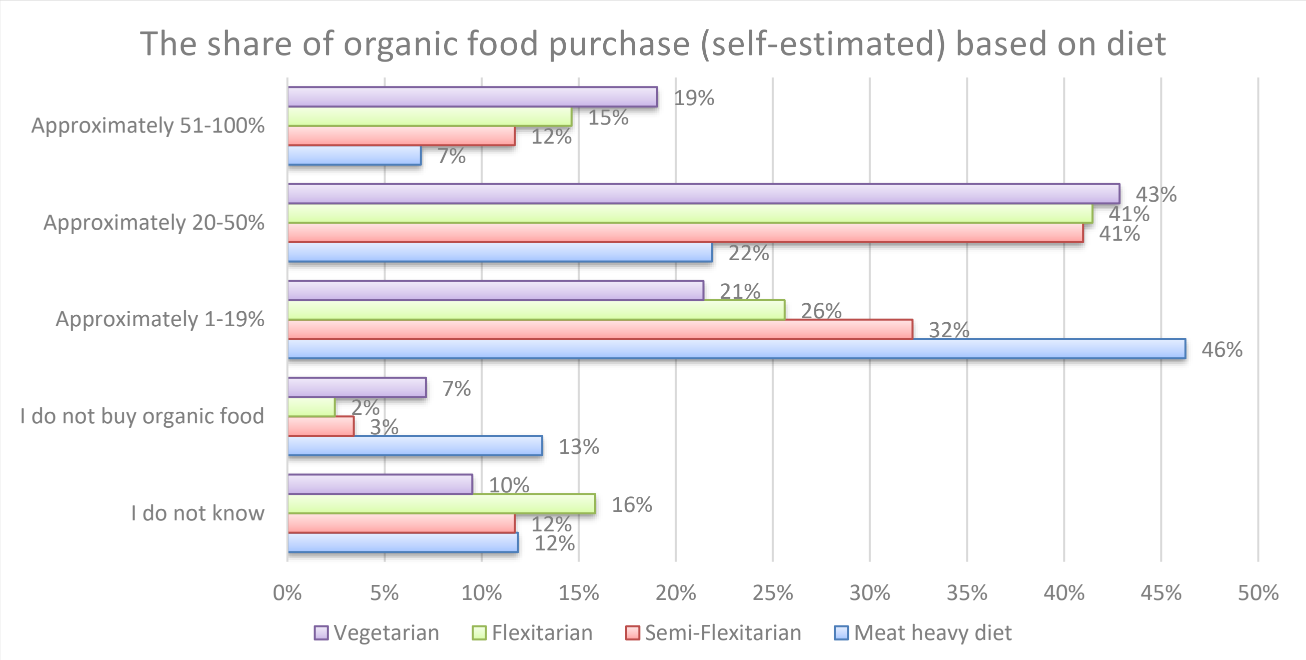


Figure 16

We also found that the ones buying processed plant-based foods also say they buy more organic food in general (Figure 17) and more of the respondents that buy processed plant-based products also think that buying organic products is important (42% vs. 24%). Therefore, it makes sense for the producers of organic plant-based products to also target the green consumer segment in Sweden. There are no notable differences between the shares of organic food purchase based on gender, age, living area or living with children.

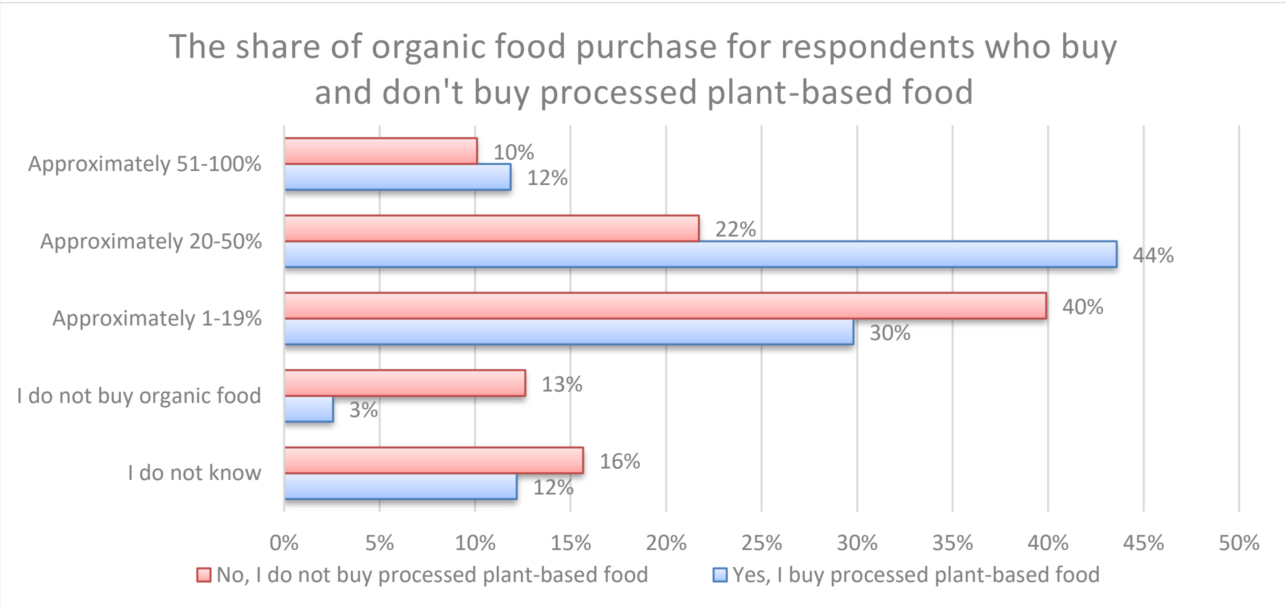


Figure 17

When we dig deeper into the different plant-based product groups, then we see that vegetables and fruits have the highest organic shares. Plant-based ready meals are in the bottom together with bread, cakes, bakery etc. We also see in Denmark that many ready meals and bakery products are conventional. The reason could be that the supply is very scarce, as you can hardly find any organic bread, cakes, or fast food in the supermarkets. If there are no possibility to buy it, then the organic share is of course very low.

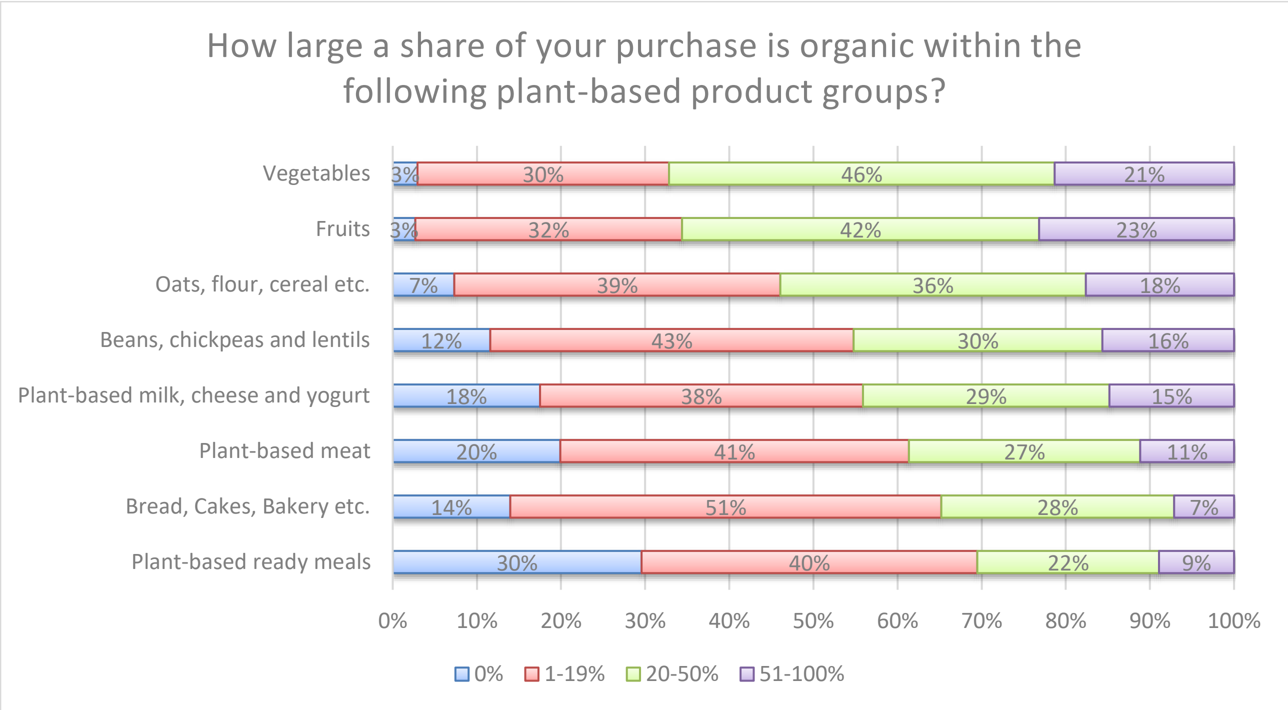


Figure 18

The three main reasons to buy organic foods are that organic food is 1) more climate friendly, 2) better for biodiversity and 3) is healthier. The Swedish population seems to have a holistic view around organic food and organic production, rather than seeing organic food improving a specific factor. There are fewest people who answered that the taste of organic food is better than the conventional counterpart.

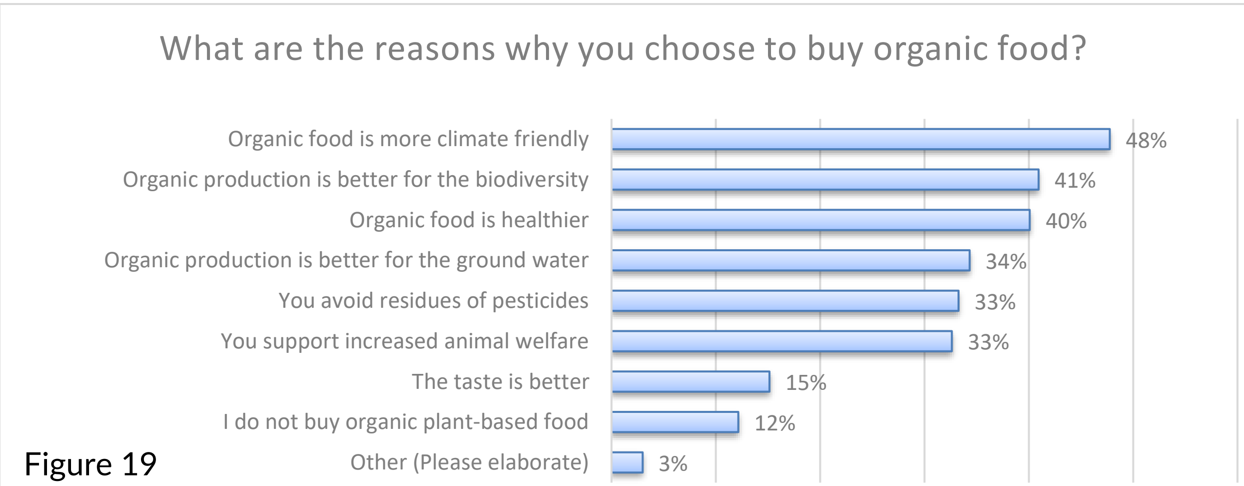


Figure 19

We have seen price being a key factor for purchasing, but it is still okay for 72% of the respondents that the price for organic plant-based products is higher than conventional meat products. How much that is in specific DKK or % is unknown and will depend on product type and competitor prices. It is worth noting that 54% are only willing to pay a little more, so the organic plant-based products cannot be much more expensive than the competing product.

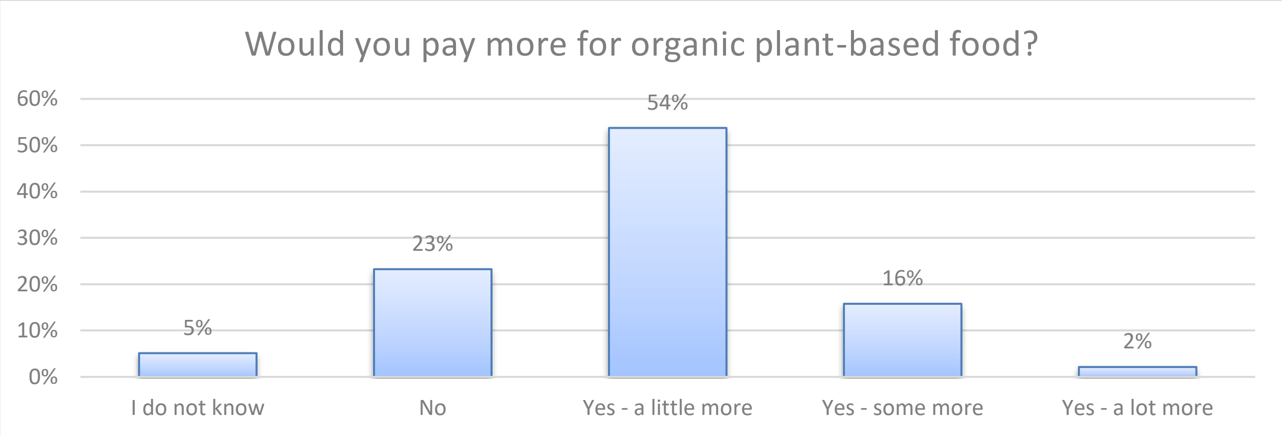


Figure 20

The reason for not buying more organic food is that it is too expensive. Interestingly the second reason, with 38% of the answers, is that there is a limited selection of organic products, which marks an opportunity for the export of Danish organic plant-based products to Sweden.

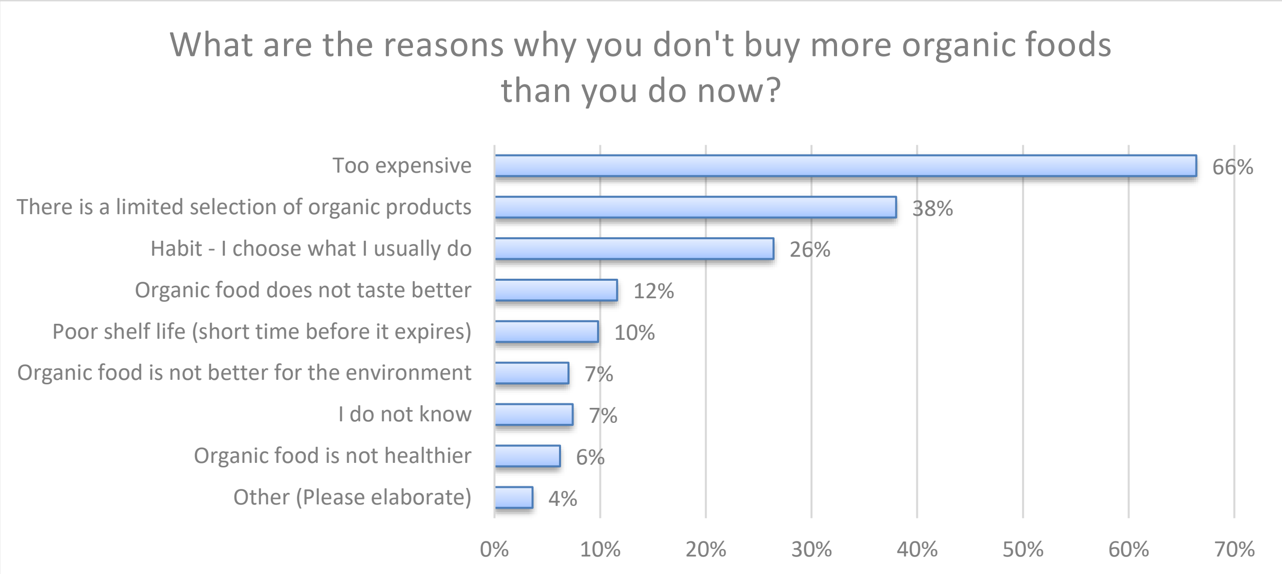


Figure 21

The selection of organic plant-based product groups is mostly unsatisfactory in plant-based ready meals, bread, cakes, bakery etc. and plant-based meat. 36% are satisfied with the plant-based milk, cheese, and yogurt group, leaving it on the top of the chart. But 36% satisfied respondents do not sound of much, considering that Swedish Oatly have a broad product range in Sweden. Even with Oatly and other players in the market, there is still room for improvement within the organic plant-based dairy.

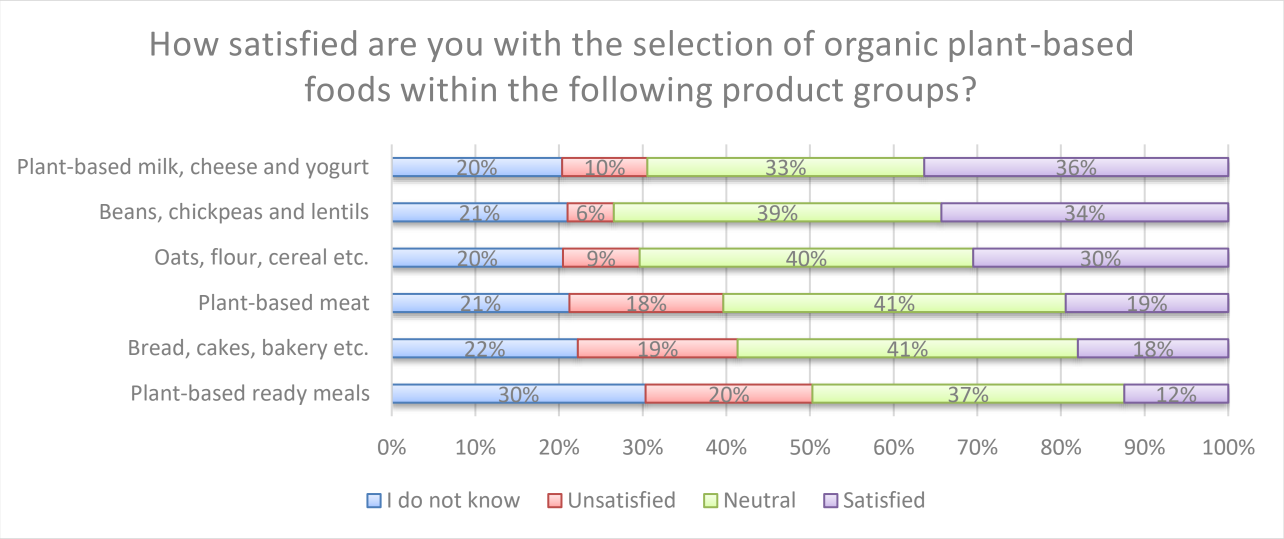


Figure 22

The main reason why people eat the way they do is because of health and secondly because of habit. Climate comes in third. The share of people eating because of the environment is higher for respondents that live in bigger cities.

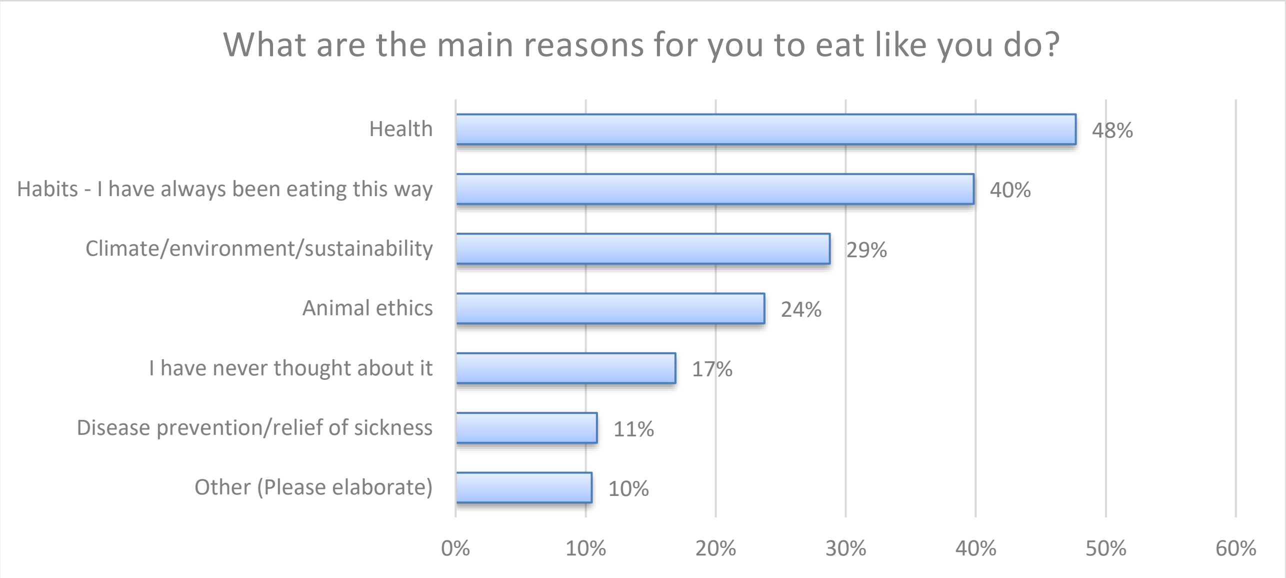


Figure 23

When we compare the reasons with the diet habits, we see that the reasons vary widely between the groups. Health is the main reason for the flexitarian and semi-flexitarian segments, while animal ethics is the main reason for the vegetarian group and habits are the main reason for the ones with a meat heavy diet. A striking difference is the climate reason, which differs widely between the four groups. The more plant-based you eat, the more the climate is the reason, starting at 60% for the ones with a vegetarian diet to less than 10% for the ones with a meat heavy diet. It is also worth noting that 23% of the ones in the meat heavy diet have never thought about why they eat the way they do, which is the highest of all groups. Perhaps with more educated consumers, we will see a bigger shift towards more plant-based diets and thereby also an increased purchase of organic products.

The general high interest for health can be a good reason for companies to focus their marketing on the health claim of organic products such as few pesticides.

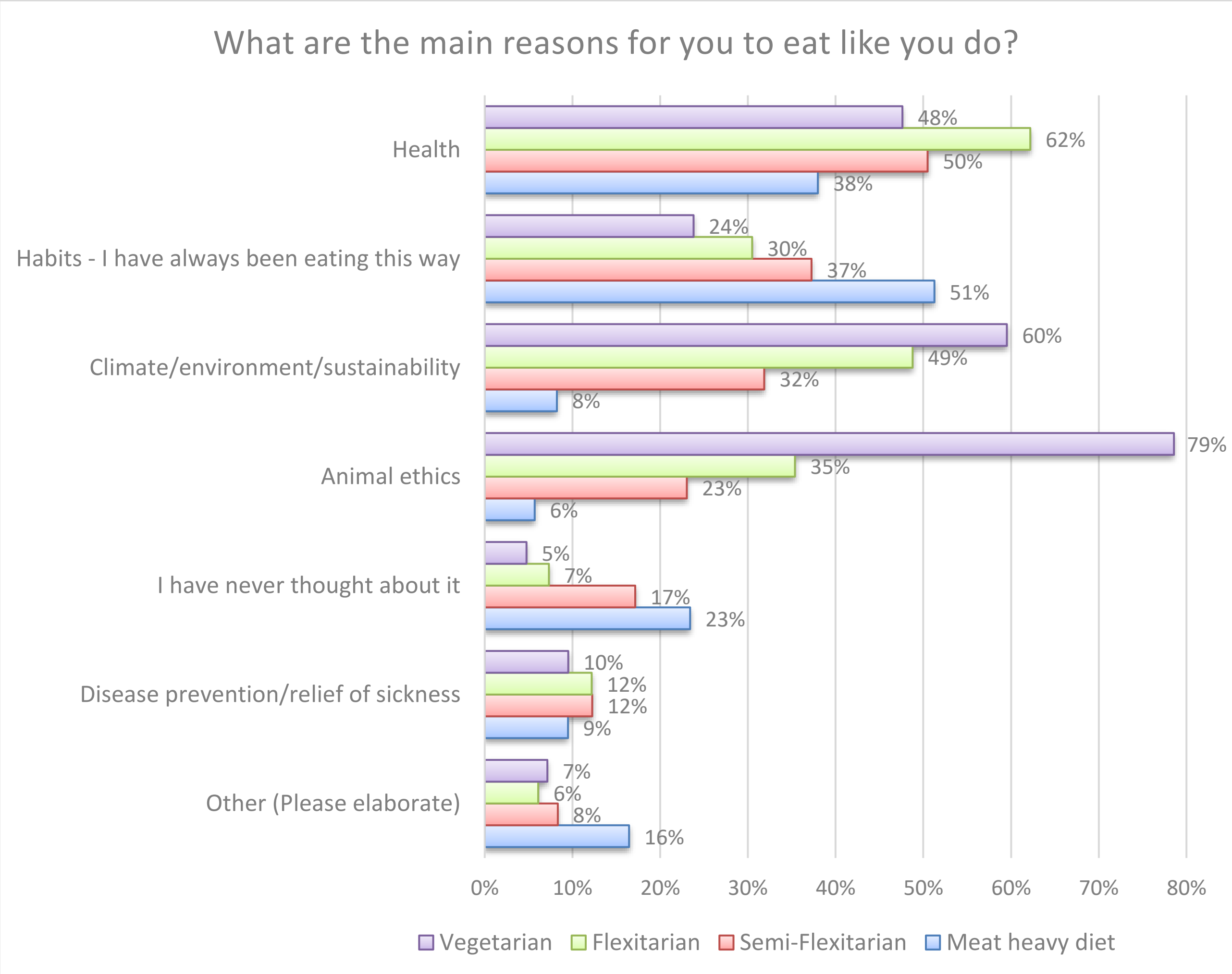


Figure 24

An official vegetarian label is slightly more important than an official vegan label. It is only the vegetarian/vegan segment that prefers a vegan label over a vegetarian label (graph not shown). The preference for a vegetarian label is probably because most respondents do not eat a vegan diet. And when the respondents think of eating plant-based, then the first thing they think of is to cut the meat away, thereby giving meat the highest priority.

The respondents rather want a national organic label compared to a European one, but only with a small margin. Overall, the organic label is more important for most respondents than the vegetarian/vegan label.

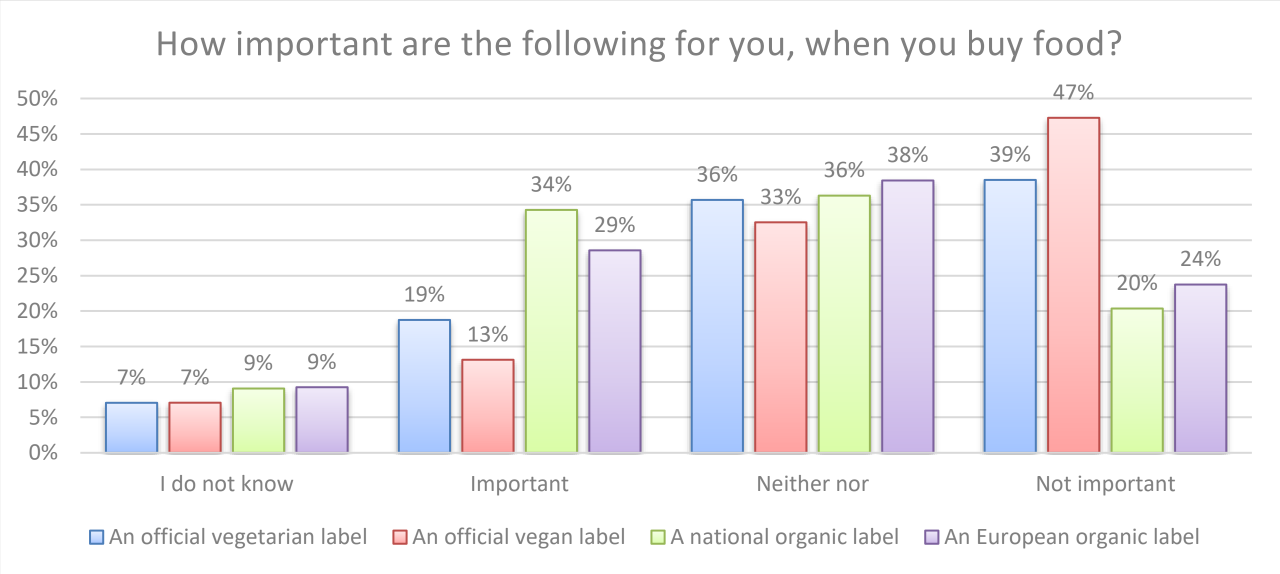


Figure 25