Plantebaseret Videnscenter

ØKOLOGISK LANDSFORENING

Dansk Vegetarisk Forening

Organic Preferences Among Plant-Based Consumers in Poland

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Content

Introduction

This inspirational paper intends to present the preferences of mainly the Polish flexitarian and vegetarian consumers within organic and organic plant-based foods (the term 'the green consumer segments' will be used when these two consumer groups are mentioned together).

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

The inspirational paper is based on 519 respondents between the ages of 18 to 75 years old. See below figures of the respondents' demographic profiles. The data was collected between the 29th of May to the 22nd of June 2023. The Green REV Institute in Poland collected the data.

Demographic features of the respondents in the survey

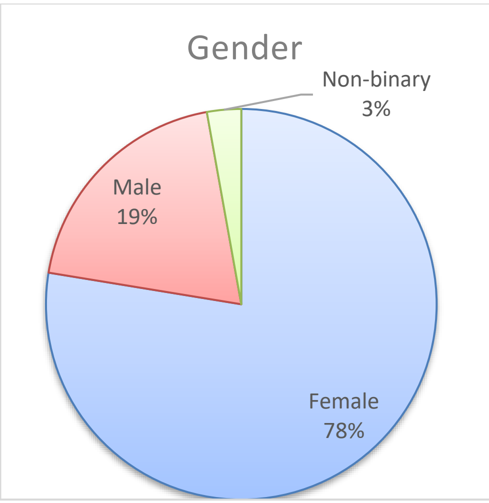

Figure 1

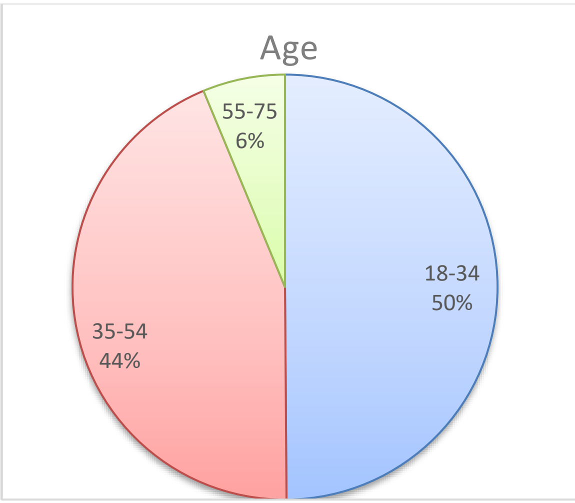

Figure 2

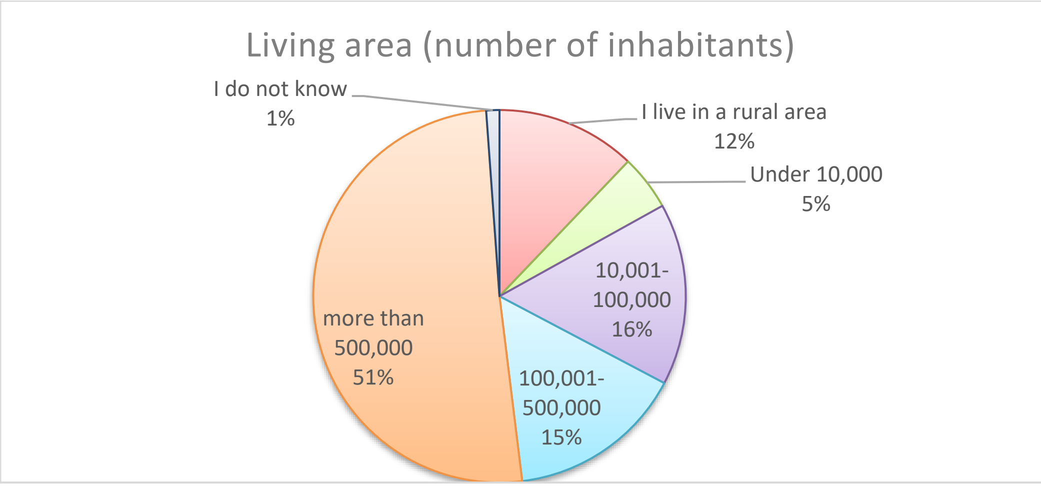

Figure 3

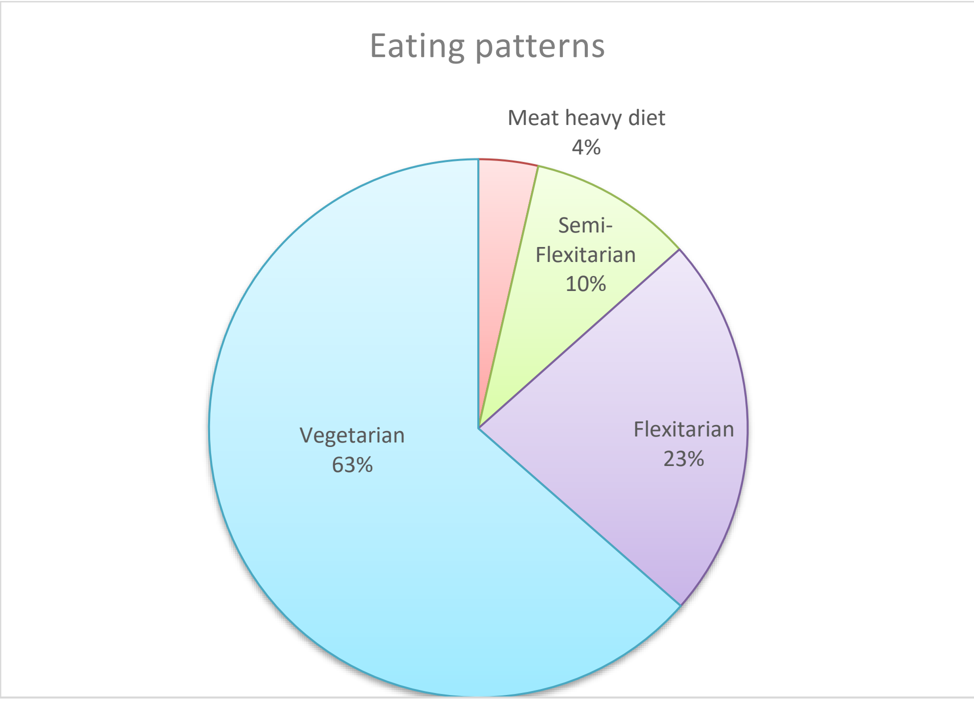

Figure 4

Definitions of diets:
Vegetarian = Only eat vegetarian lunches and dinners (incl. vegan)
Flexitarian = Eat 8 to 13 vegetarian meals per week
Semi-flexitarian = Eat 3 to 7 vegetarian meals per

Results and conclusions

88% of the respondents wish to eat more organic plant-based food in the future (Fig. 5). Only 9% of the respondents do not buy organic food now. But most respondents have an organic share of food purchase between 1% to 19% (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. 14). 87% of the respondents are willing to pay more for organic plant-based products (Fig. 16). The main reason for not buying more organic food is that it is too expensive (78%) and secondly that there is a limited selection of organic products (46%) (Fig. 17).

The selection of organic plant-based product groups is mostly unsatisfied in the categories: “Bread, cakes, bakery etc.”, “plant-based ready meals” and “plant-based meat” (Fig. 18).

Animal welfare is the most important factor when purchasing food, which reflects that the respondents in this survey belong to the green consumer segments. The respondents might not know the organic food principles and values completely, since organic food is ranked second lowest among several priorities when buying food, but the practices with organic production are ranked higher, such as avoiding pesticides, which is ranked number three (Fig. 6).

Younger consumers living in bigger cities are more likely to sometimes buy processed plant-based food (Fig 7+8). The three main reasons for not buying processed plant-based foods are too high prices, too many additives and bad taste or texture (Fig. 10).

The respondents are generally positive towards many plant-based ingredients, but the ones scoring lowest are wheat and soy (Fig. 12).

Among the green consumer segment, we see that a vegan label is more valuable than a vegetarian label. Interestingly we also see that a European organic label is slightly favored compared to a national organic label, but both labels are still important for more than 50% of the respondents (Fig. 19).

Recommendations

There could be an opportunity for Danish companies to export organic plant-based products to Poland because 88% of the Polish respondents want to eat a more organic plant-based diet and 46% stated that the reason for not buying organic products is because there is a limited selection.

The preference of a European organic label compared to a national organic label is interesting, combined with the answers to how important different factors are when buying food, where local products are ranked in the lower half (Fig. 6). It could indicate that Polish consumers are not as focused on buying local products as we see in many other countries, thereby giving an opportunity to international companies to enter the market.

Knowledge about the meaning of the organic label is lacking in Poland, as it is in many other countries. When highlighting your product is organic, then think of promoting some of the key features of organic production, for example no/few additives, avoiding pesticides or better for biodiversity:

- It is worth mentioning that there are no/few additives in your organic plant-based product, especially for processed organic plant-based food, as “high on additives” was the second most frequent barrier for respondents not to purchase processed plant-based products (Fig. 10).
- Another recommendation is to have a greater focus on the improved biodiversity of an organic plant-based food production when selling to the green consumer segment in Poland, as animal welfare was the most important factor for this segment when buying food. A plant-based product is reducing the negative impact on other animals, but the consumer segment could be made more aware that the production methods, e.g. organic, also play a crucial role in improving animal welfare via biodiversity.

When choosing your ingredients for your organic plant-based products, then legumes or potatoes have a very positive reputation among the respondents. Consider not using soy or wheat, which might have a negative association for some.

One of your target groups should be the younger generations living in bigger cities, as most of them consume processed plant-based food.

If you produce organic plant-based foods that is categorized as: “Bread, cakes, bakery etc.”, “plant-based ready meals” or “plant-based meat”, then there is an even better chance of success.

The results of the survey in detail

The green consumer segment in Poland is eating a lot of plant-based foods, but 88% say they want to eat more organic plant-based foods in the future, which is a great start for Danish producers of organic plant-based food.

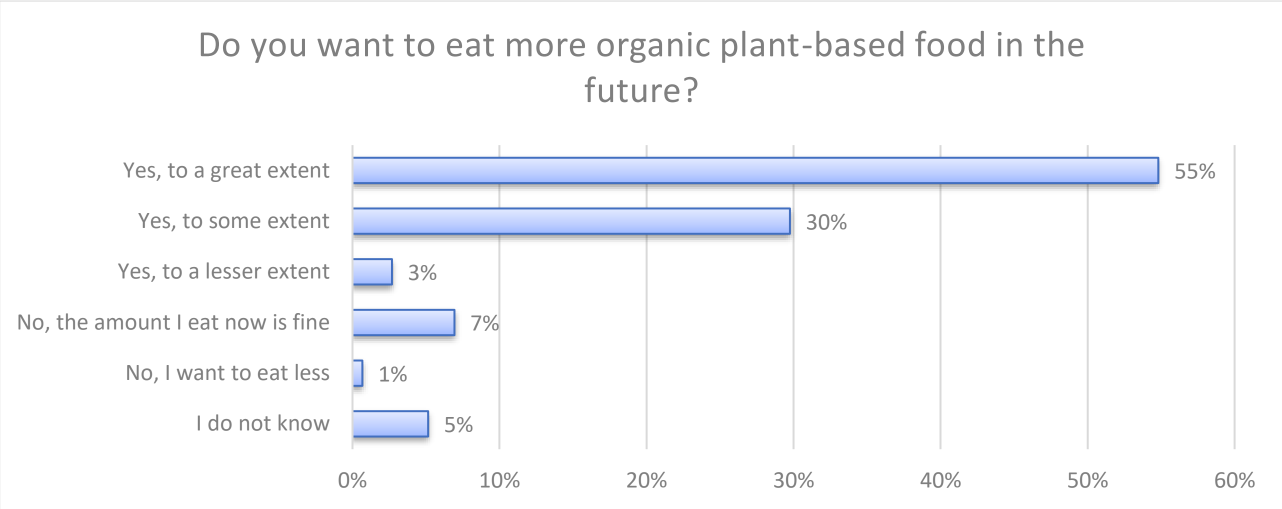

Figure 5

Animal welfare is highest ranked, which is understandable since the survey includes 86% of the respondents belonging to the green consumer segment. Interestingly, the respondents have placed organic products as the second lowest factor (it is still important or very important for 68% of respondents), while giving higher importance to the environment, avoiding additives, biodiversity and avoiding pesticides, which are all factors within the organic concept together with better animal welfare. It seems that the respondents are not aware of what organic means. Therefore, an organic claim on products in itself might not be adding enough value for customers, but there need to be mentioned elements of organic production as well.

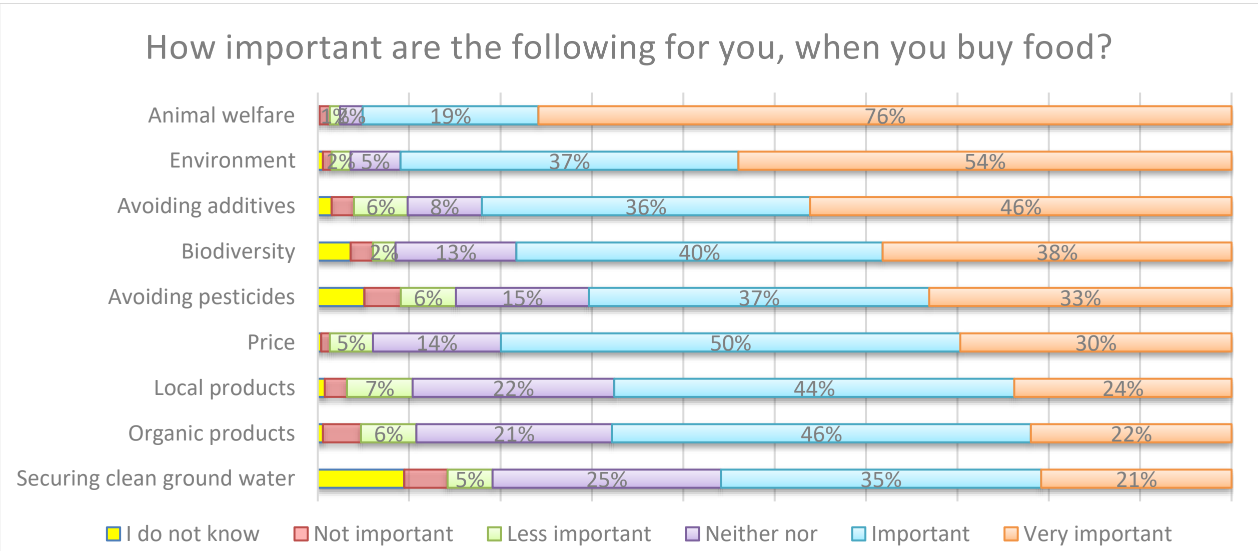

Figure 6

Most of the respondents buy processed plant-based foods, but we can see that slightly more younger respondents buy it (Fig. 7). 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 (Fig 8). There is no difference between men and women (graph not shown), but there is a difference between the amount of meat you eat, as the more plant-based you eat, the more people sometimes buy processed plant-based foods (Fig. 9).

Do you sometimes buy processed plant-based foods?

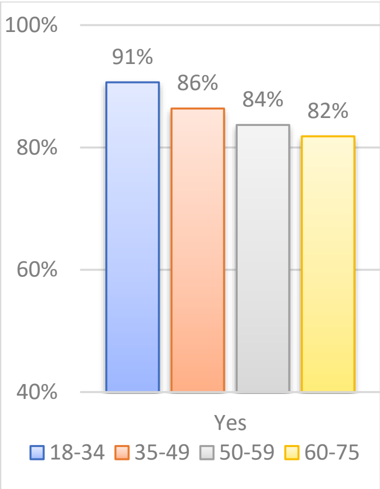

Figure 7

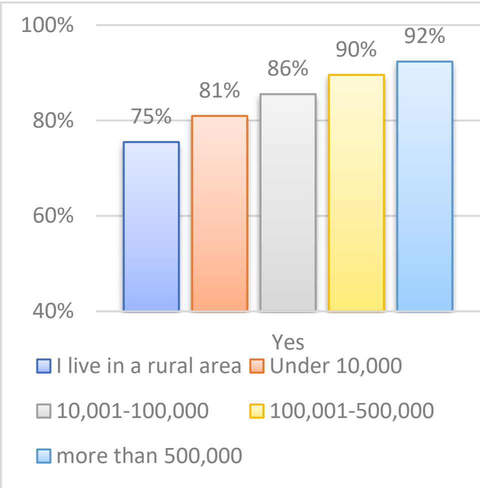

Figure 8

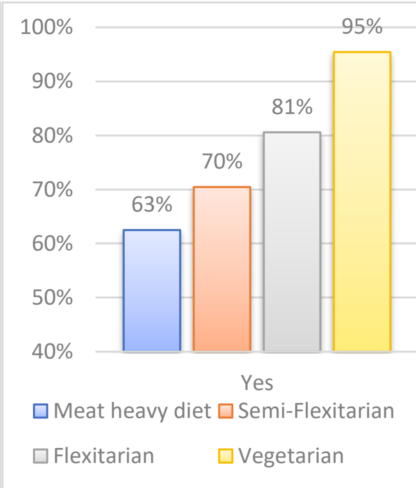

Figure 9

The reason for not buying more processed plant-based foods is because it is too expensive. It is also perceived as being high on additives, bad taste or texture, unhealthy or poor quality. The reason "not enough organic products" are the lowest scoring factor, which indicates that people find the selection of processed plant-based foods sufficient. However, later in the survey we see, that 37% of the respondents say that there is a lack of organic plant-based products, and this reason is the second highest ranked as a barrier to eating more organic plant-based food (Fig. 11). Another bright element is that one third of the respondents mentioned that processed plant-based foods are high on additives, but organic products have generally few or no additives, so this could be a competitive advantage. Though the price factor is a real challenge, since the consumers already find the plant-based products to be too expensive.

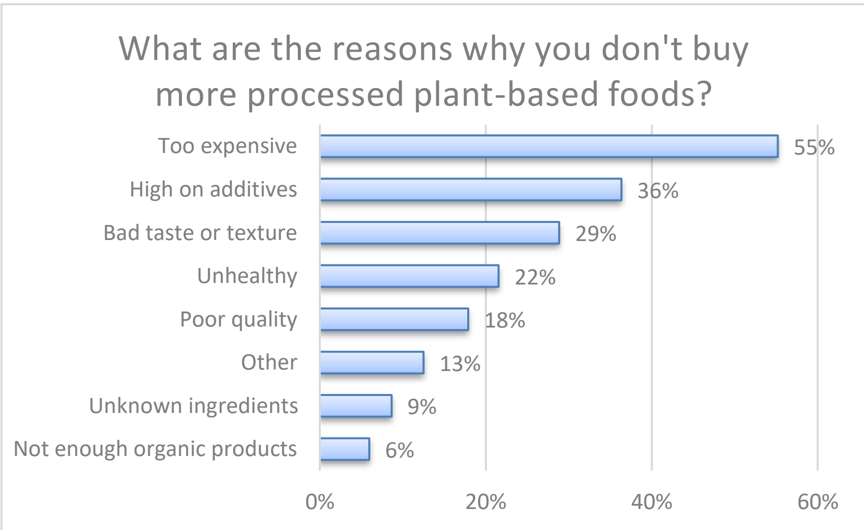

Figure 10

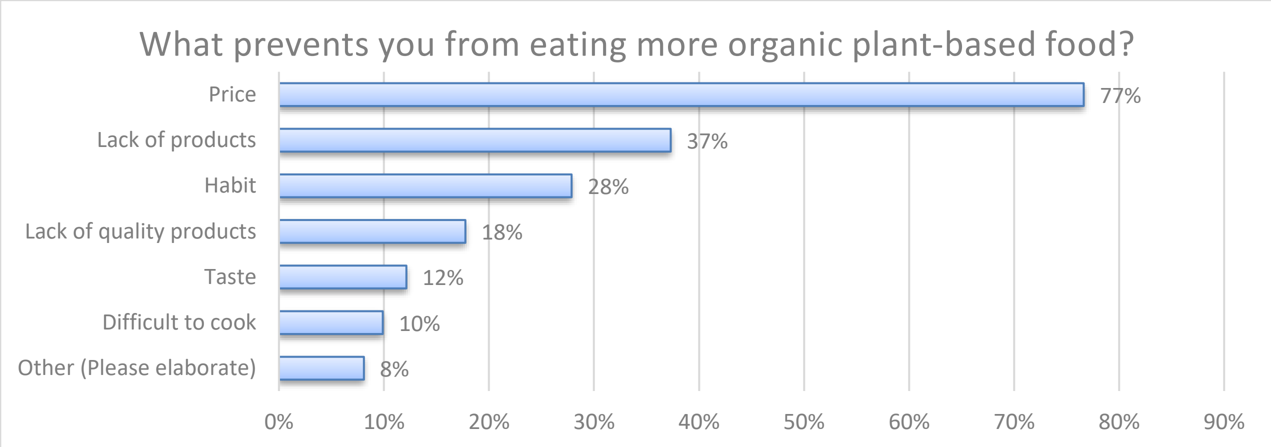

Figure 11

The attitudes towards the mentioned ingredients are generally positive. Nut being the ingredient receiving the most positive attitudes. But followed closely by bean, chickpea, potato, lentil, and pea. Rice and oat also receive more than 80% positive attitudes. Salt and sugar were put in as indicators, and they were ranked in the bottom by the respondents. Wheat has the lowest positive and most negative attitudes and then soy. Even though both have more than 60% positive attitudes, then you might want to think carefully, if you want to introduce a new plant-based product based on those ingredients.

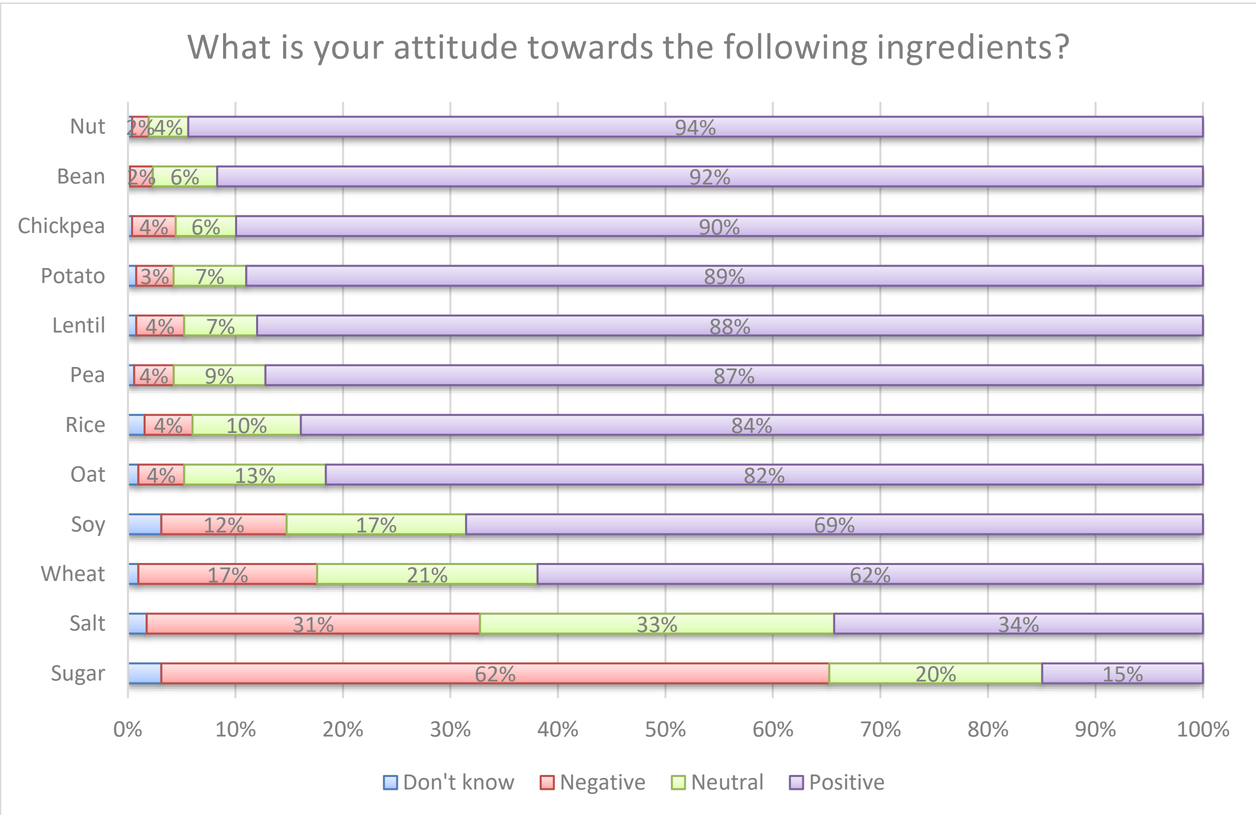

Figure 12

The green consumer segment in Poland does not buy as much organic food as the green consumer segment in Denmark. Denmark is a world leader, and this has to be remembered when looking at the numbers for Poland. However, there are only 9% who do not buy organic food at all in Poland, which leaves an open door for organic products into the Polish market.

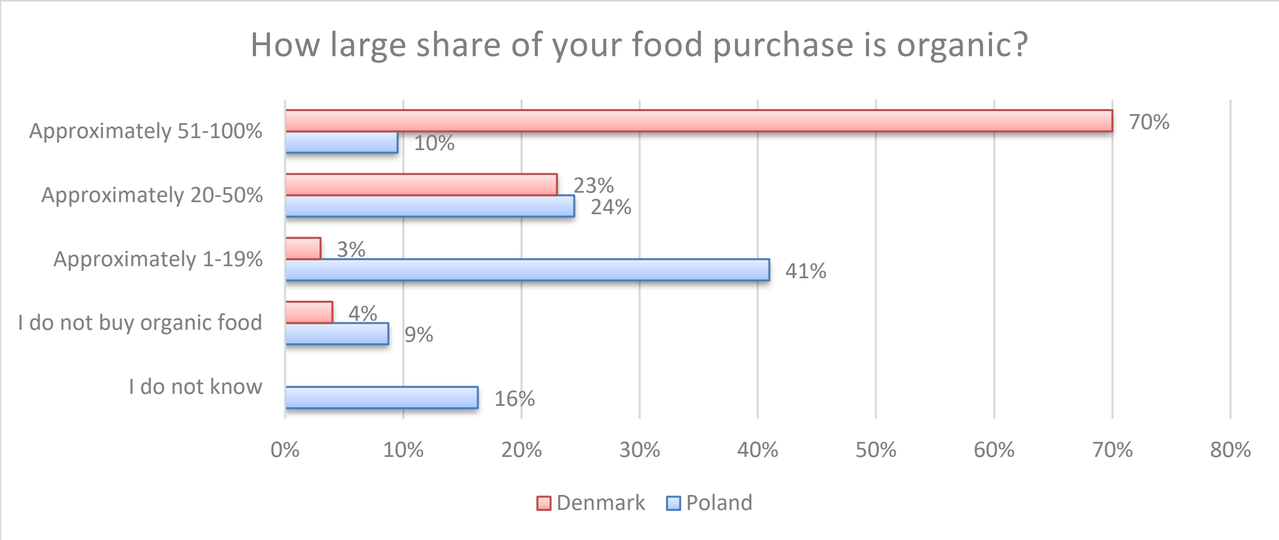

Figure 13

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 milk, cheese and yogurt products comes in third with a slightly higher share than legumes and oats etc. 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 are conventional, as consumers do not seem to care as much about organics, when it comes to fast food, cakes etc.

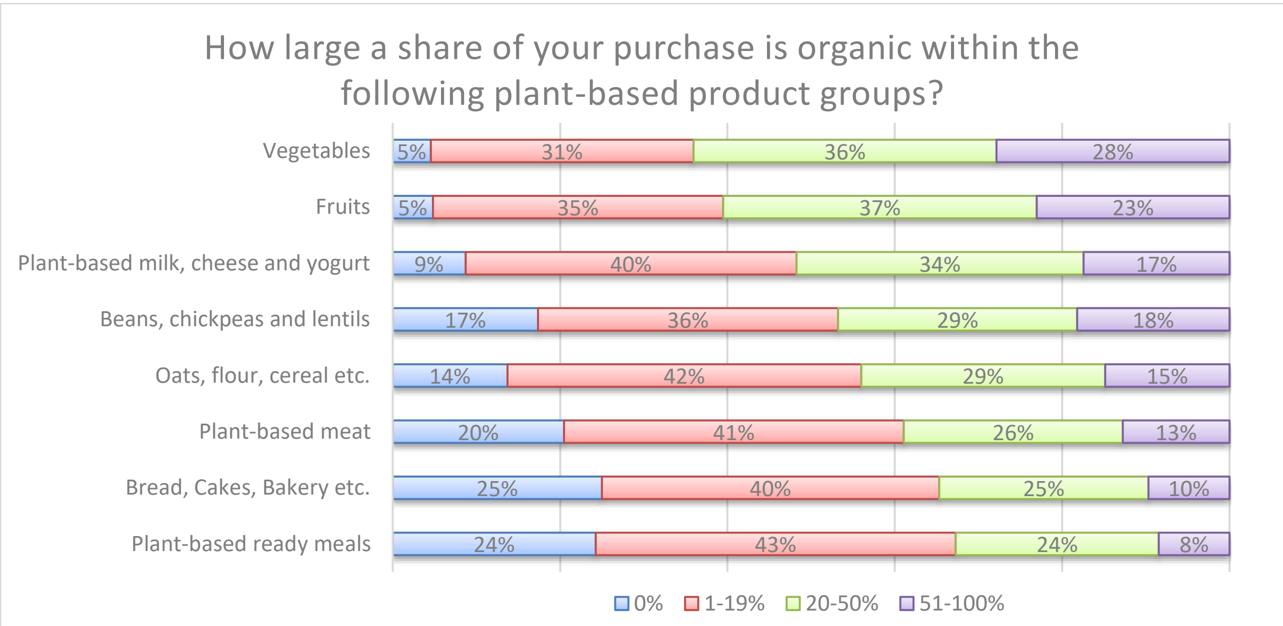

Figure 14

The reasons to buy organic foods are many and not one reason significantly distinguishes them from the others. The top two are that 1) organic production protects nature, the environment and ground water and 2) that organic food is healthier. There are fewer people than average, who answered that the taste of organic food is better than the conventional counterpart.

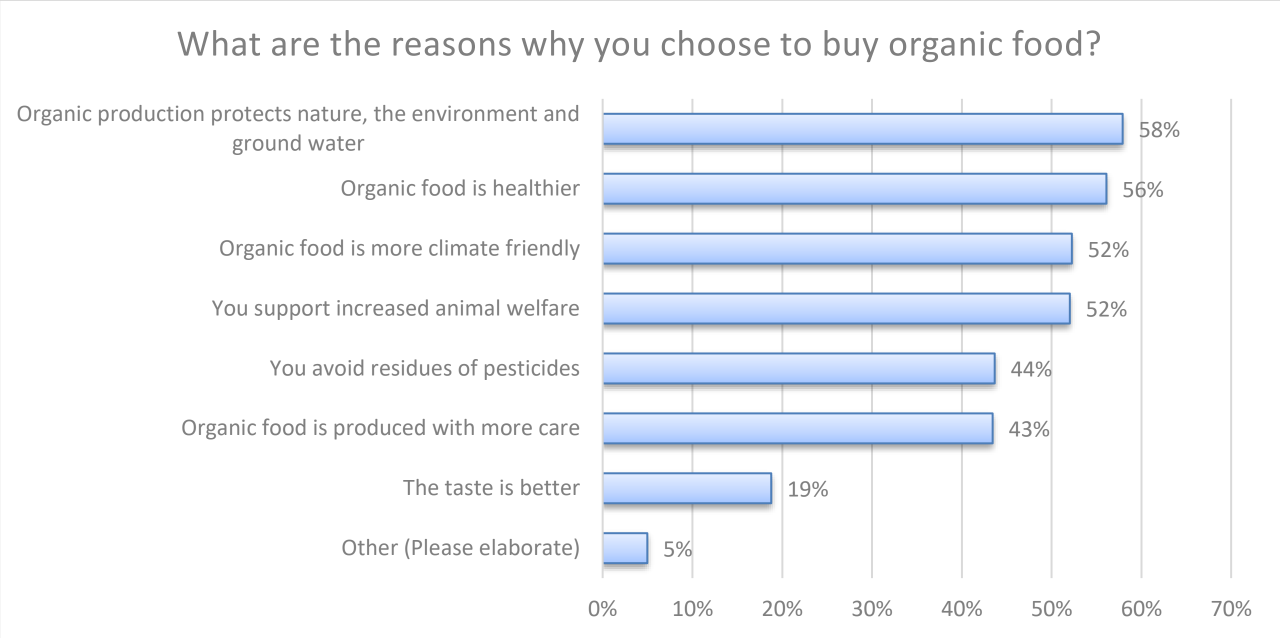

Figure 15

We have seen price being a key factor for purchasing, but it is still okay for 87% 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.

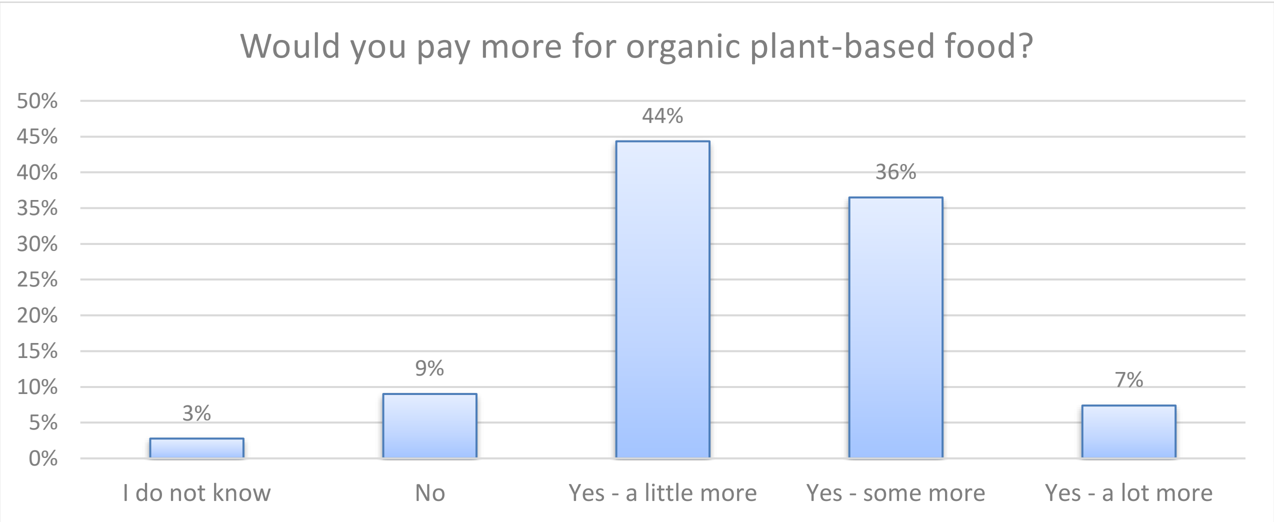

Figure 16

The reason for not buying more organic food is that it is too expensive. Interestingly the second reason, with 46% 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.

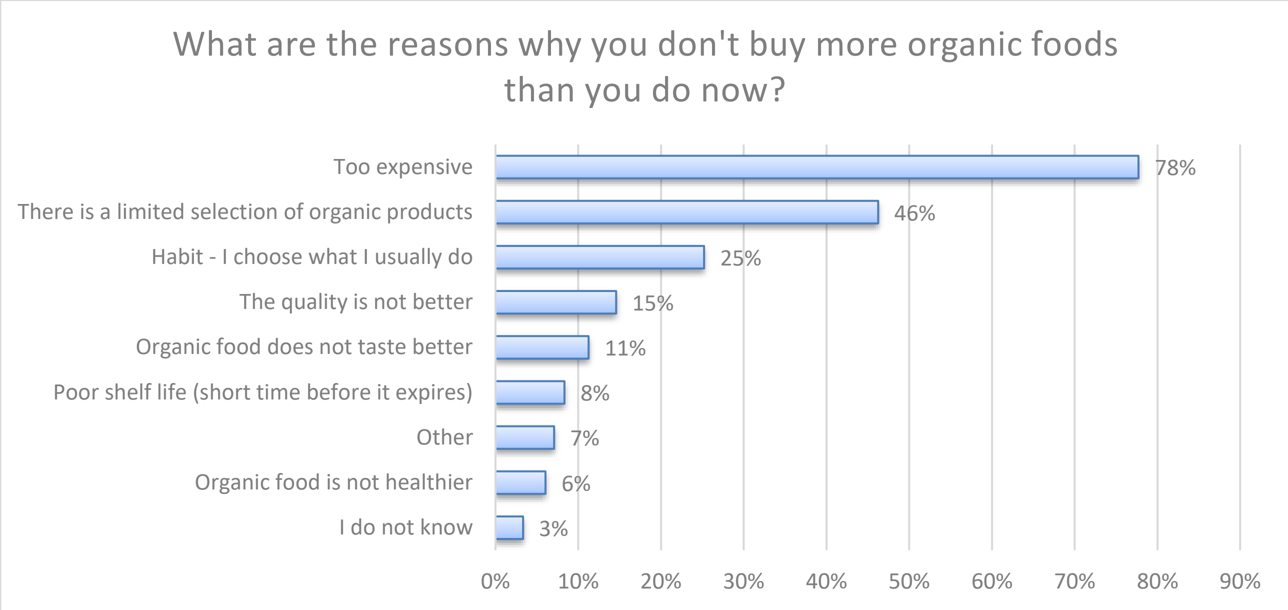

Figure 17

The selection of organic plant-based product groups is mostly unsatisfied in plant-based ready meals, bread, cakes, bakery etc. and plant-based meat. It is only 30-39% that is satisfied with the selection in these groups. Only 52% is satisfied with the plant-based milk, cheese and yogurt group, where you have a vast number of plant-based milk, so here the low number might be related to the lack of cheese and yogurt products.

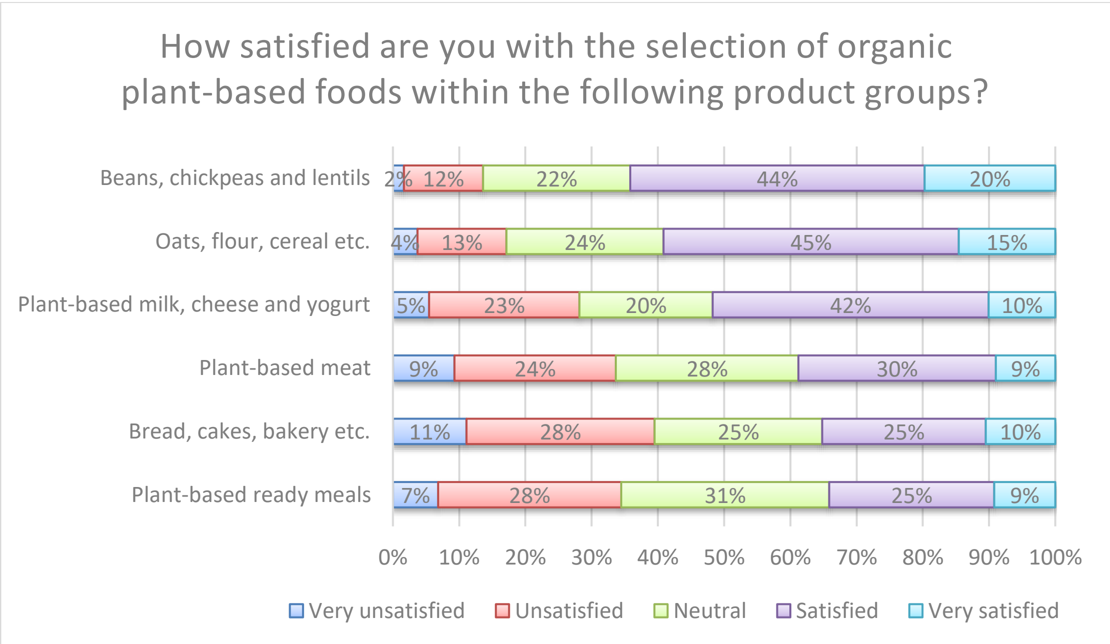

Figure 18

Among the green consumer segment, we see that a vegan label is more valuable than a vegetarian label, which can be explained by most respondents eating vegan rather than vegetarian. Interestingly we see that a European organic label is slightly favored compared to a national organic label, but both labels are still important for more than 50% of the respondents.

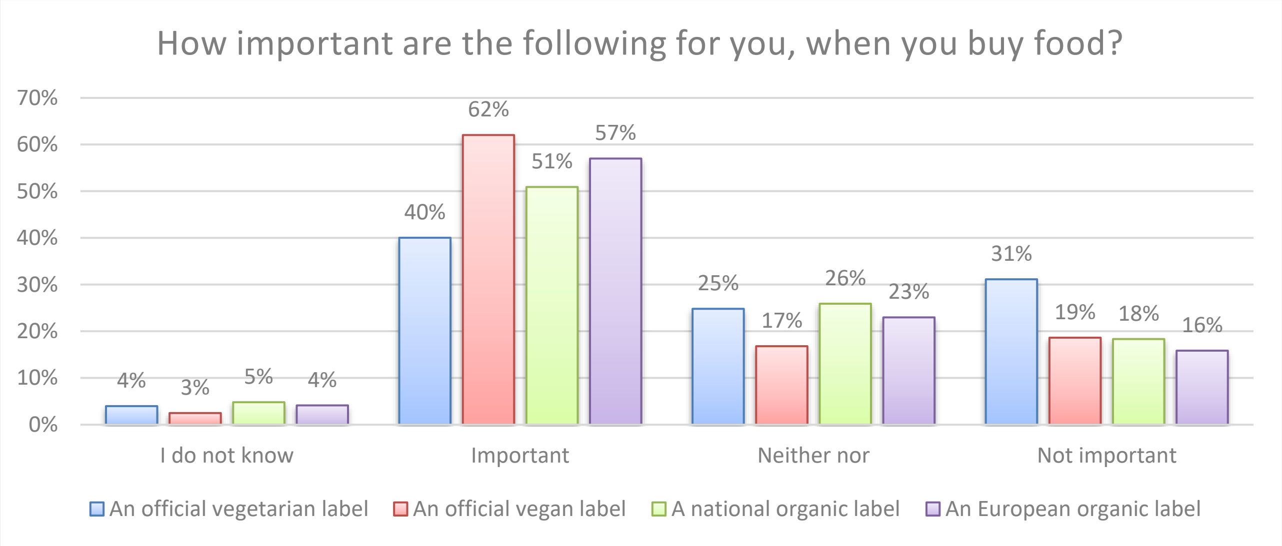

Figure 19

The main reason why the green consumer segment eats the way they do is because of animal ethics, climate and health.

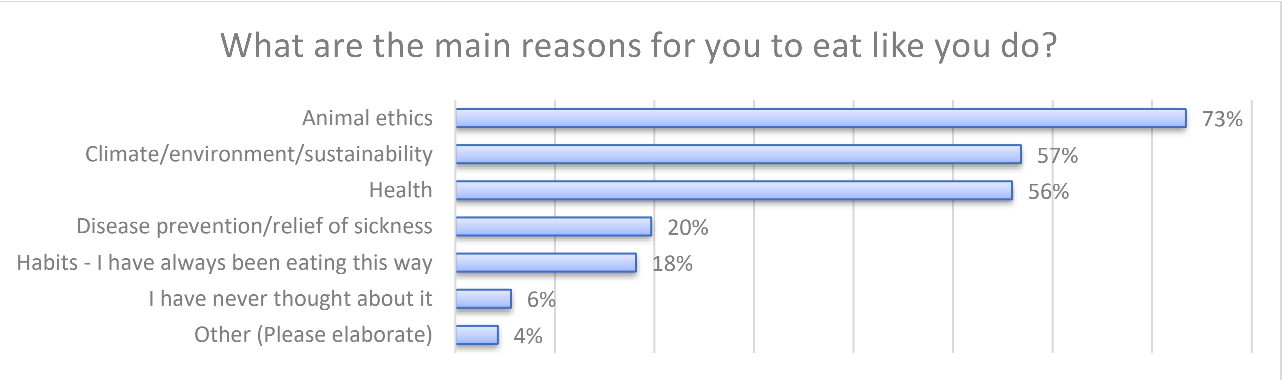

Figure 20

The respondents do most of their shopping in supermarkets and in discount stores.

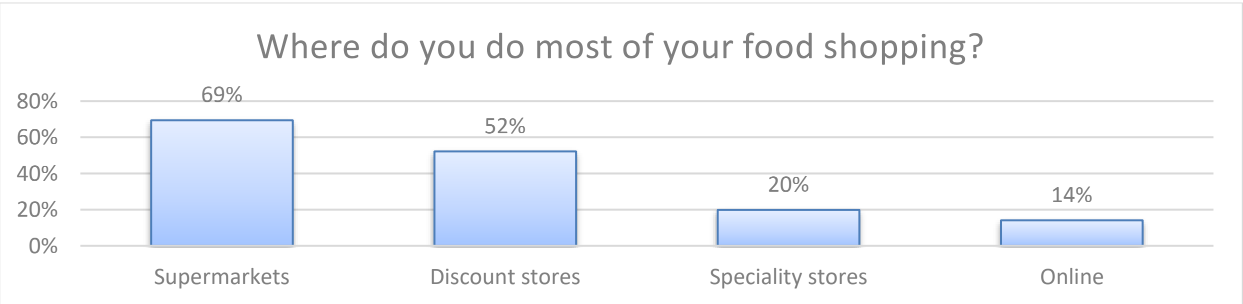

Figure 21