



Meat consumption and attitudes towards sustainable proteins in Europe

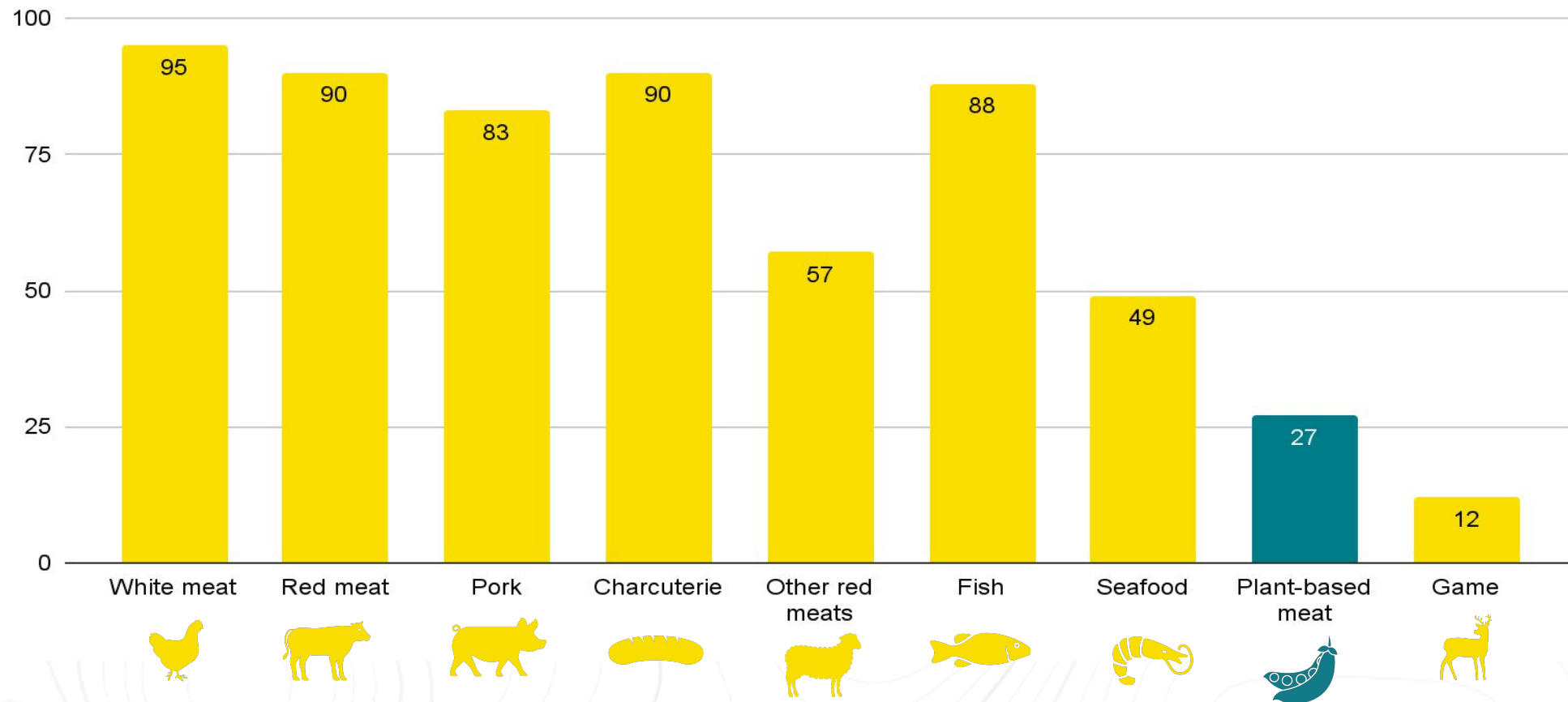
Results of a representative survey by OpinionWay | September 2022

Conventional and plant-based meat



One in four French consumers eat plant-based meat every month

Which of the following products do you consume at least once a month? *(Figures in %)*

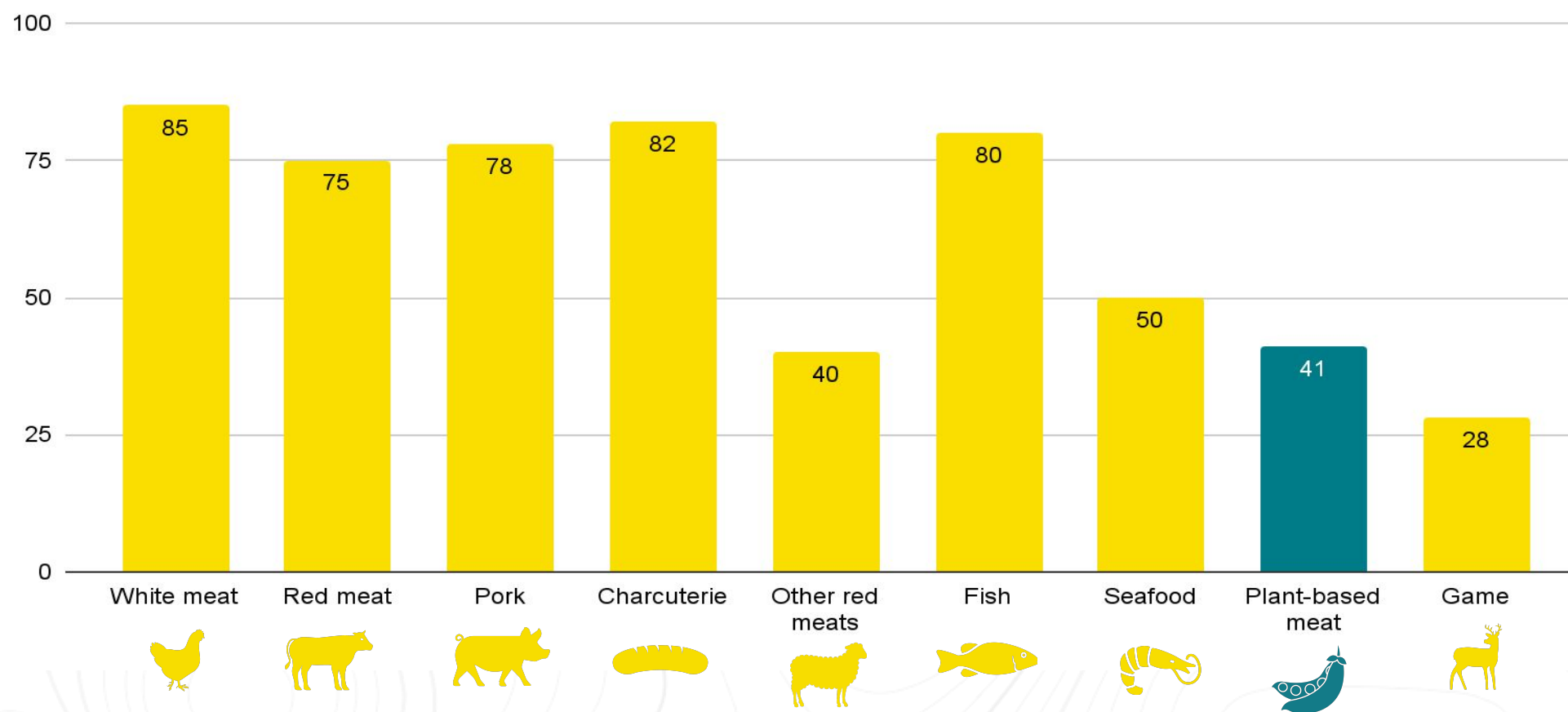


Source: OpinionWay survey – representative online survey of 1,058 people in France aged 18 and over

40% of German consumers eat plant-based meat every month

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Which of the following products do you consume at least once a month? (figures in %)

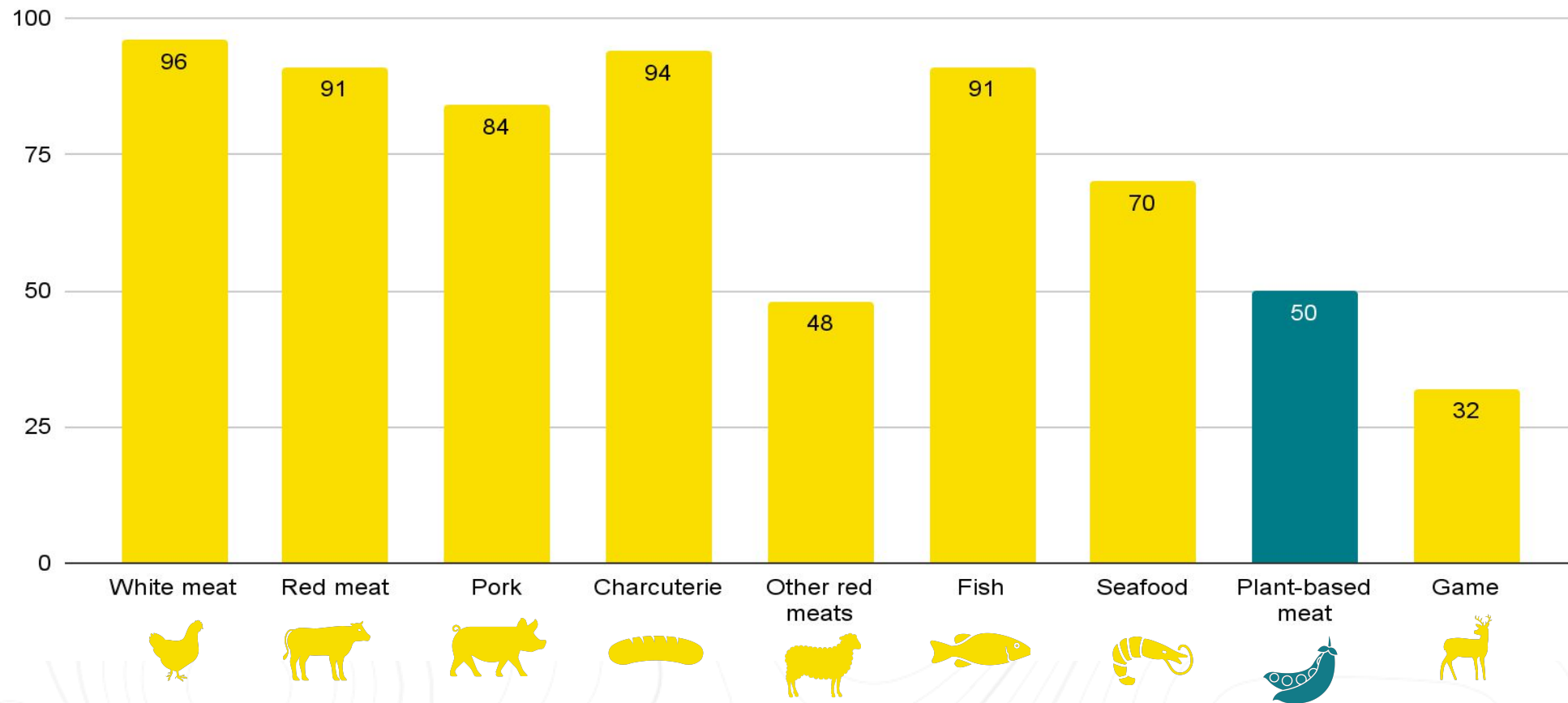


Source: OpinionWay survey – representative online survey of 1,002 people in Germany aged 18 and over

Half of Italian consumers eat plant-based meat every month

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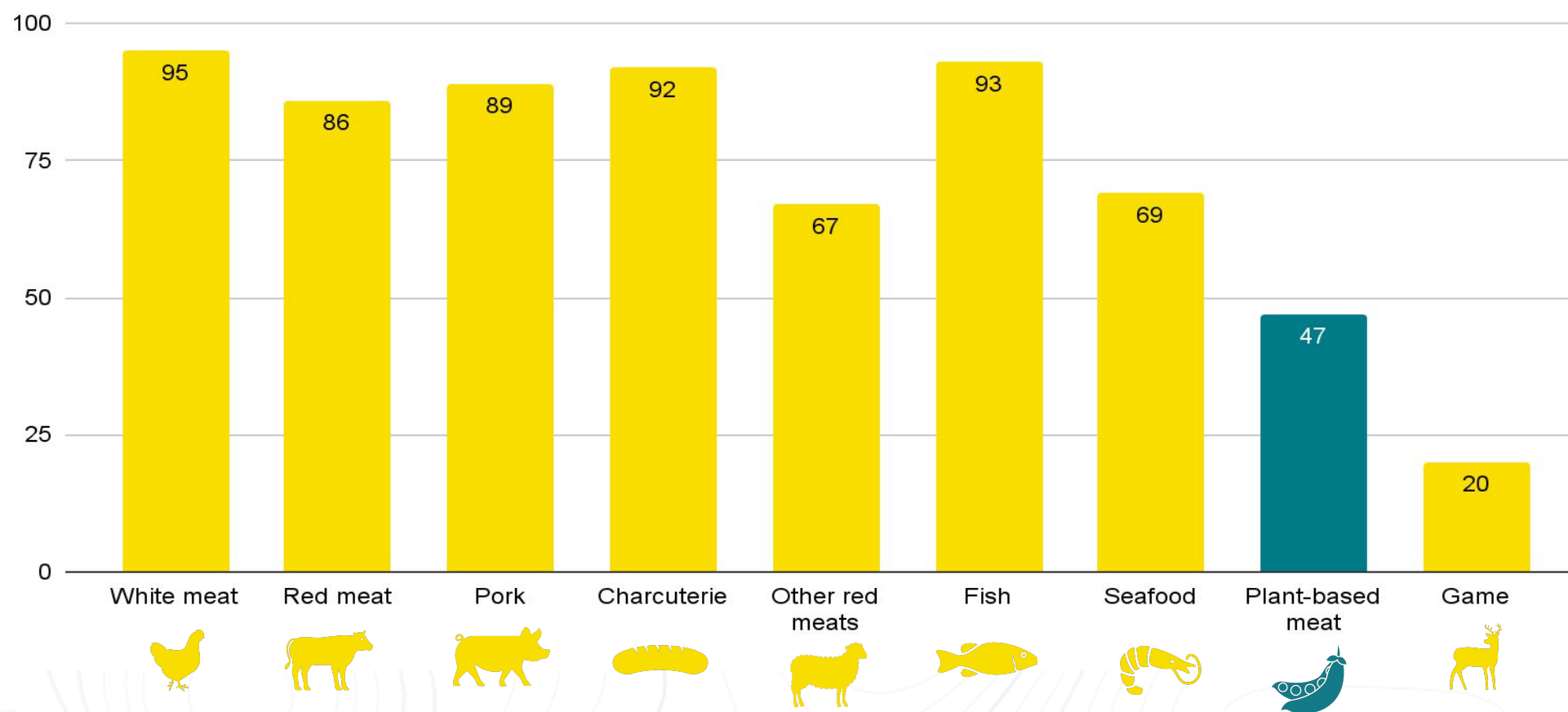
Which of the following products do you consume at least once a month? (figures in %)



Source: OpinionWay survey – representative online survey of 1,011 people in Italy aged 18 and over

Almost half of Spanish consumers eat plant-based meat every month

Which of the following products do you consume at least once a month? (figures in %)



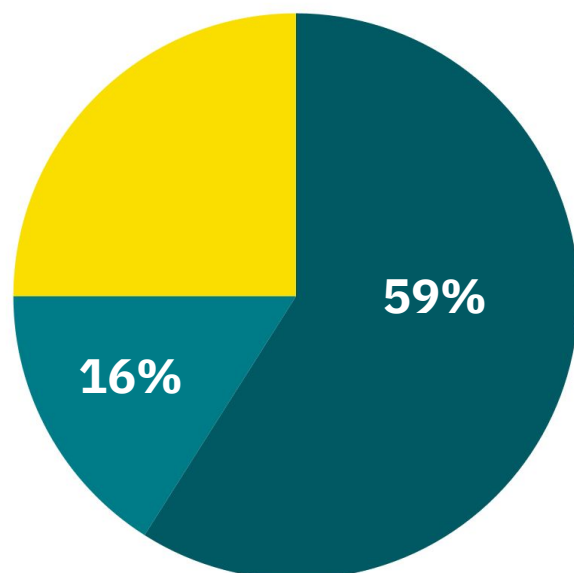
Source: OpinionWay survey – representative online survey of 1,025 people in Spain aged 18 and over

A majority in all countries have reduced their meat consumption

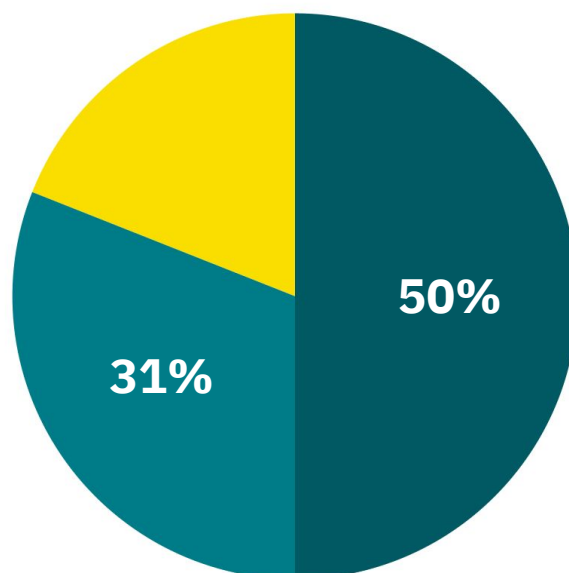
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In the last five years, have you changed your consumption habits for meat products?

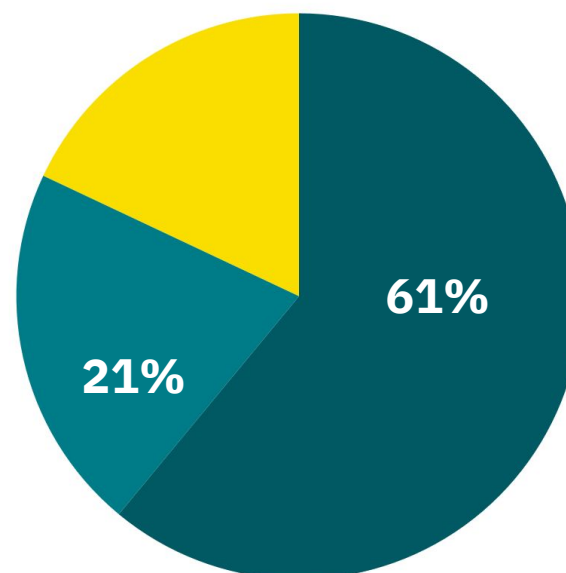
France



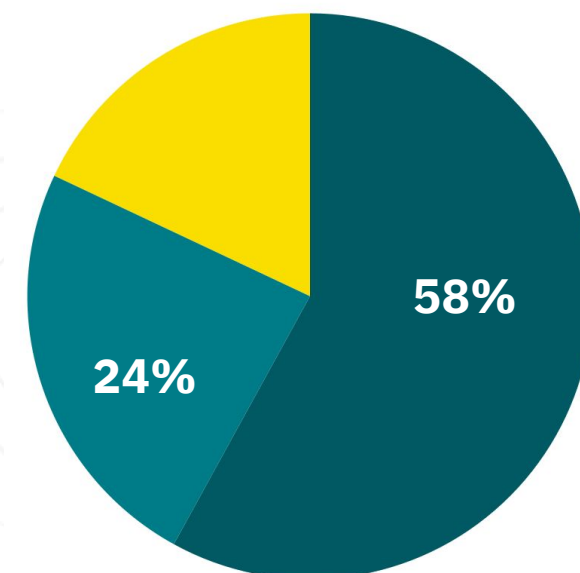
Germany



Italy



Spain



● Reduced ● Stopped ● Increased or no change

Source: OpinionWay survey – representative online survey of 4,096 people in France, Germany, Italy and Spain aged 18 and over

Environment is a key reason for reducing red meat consumption in all countries

For what reasons have you stopped, reduced or never eaten red meat? *Three most popular answers shown.*

France

It's too expensive	39%
Environment	32%
Animal welfare	23%

Germany

Animal welfare	38%
Environment	37%
Health	22%

Italy

Health	35%
Environment	30%
Animal welfare	26%

Spain

Health	29%
Environment	27%
Animal welfare	25%

Consumers want to eat more plant-based meat

Over the next few years, do you intend to increase your consumption of these products? *Three most popular answers shown.*

France

Fish	19%
Plant-based meat	11%
White meat	10%

Germany

Plant-based meat	25%
Fish	22%
White meat	13%

Italy

Fish	40%
White meat	25%
Plant-based meat	23%

Spain

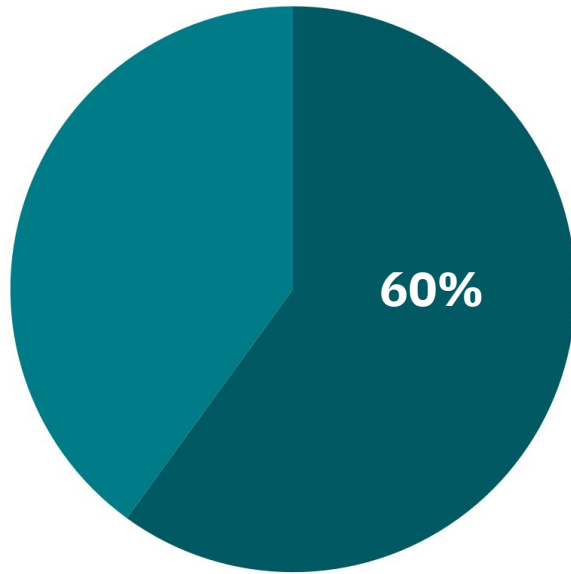
Fish	36%
Plant-based meat	24%
White meat	24%

A majority in all countries believe meat consumption must be reduced

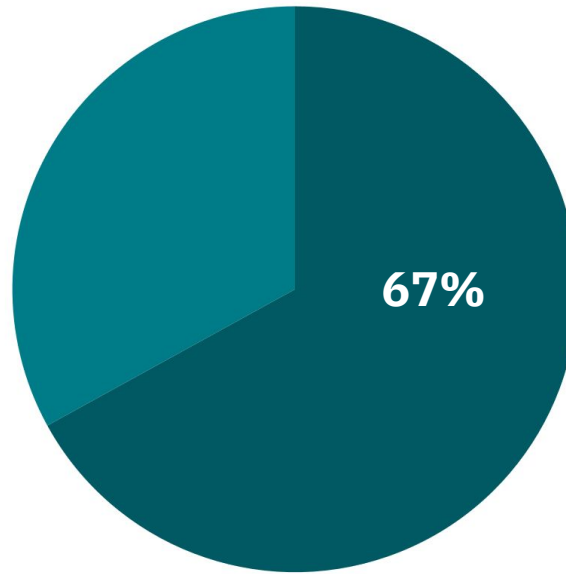
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Do you agree that the production and consumption of animal meat must be reduced?

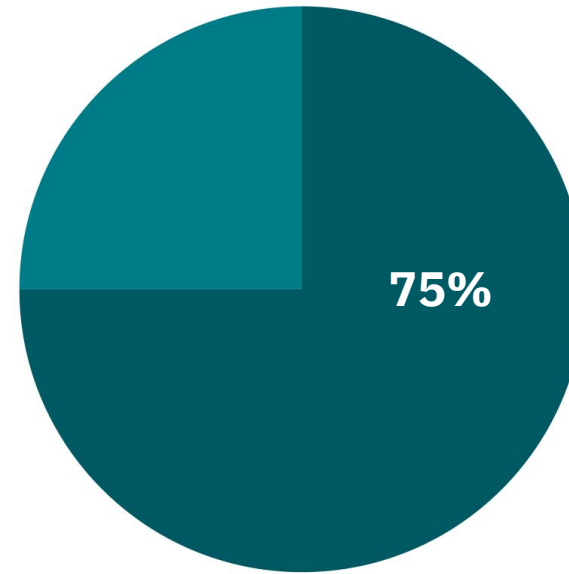
France



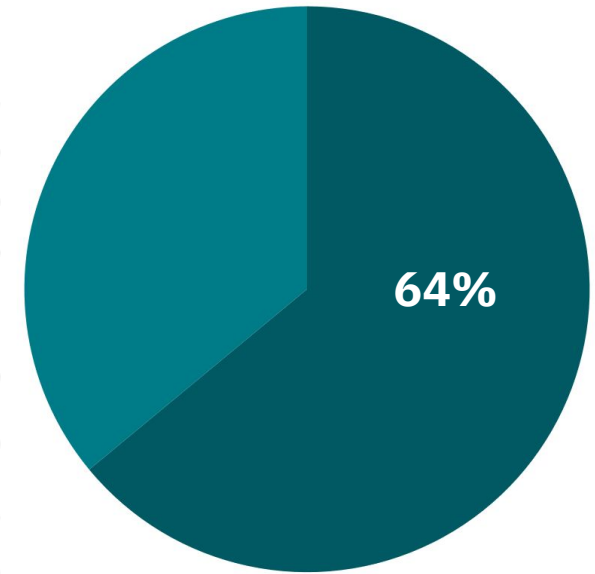
Germany



Italy



Spain



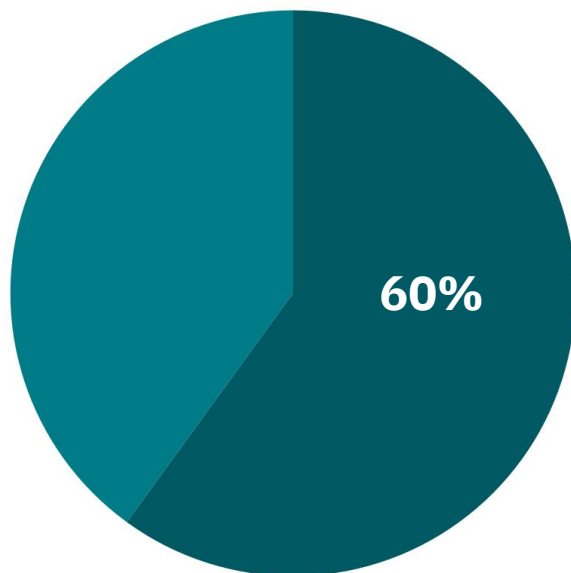
● Agree ● Disagree

Source: OpinionWay survey – representative online survey of 4,096 people in France, Germany, Italy and Spain aged 18 and over

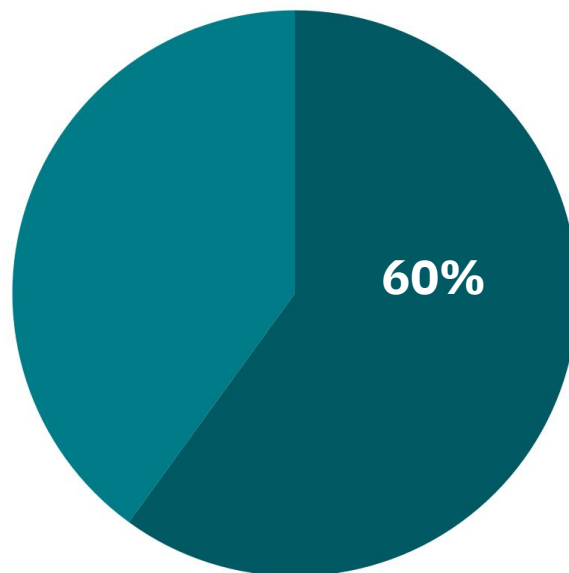
A majority in all countries believe alternatives to conventional meat must be found

Do you agree that alternatives to the production and consumption of animal meat must be found?

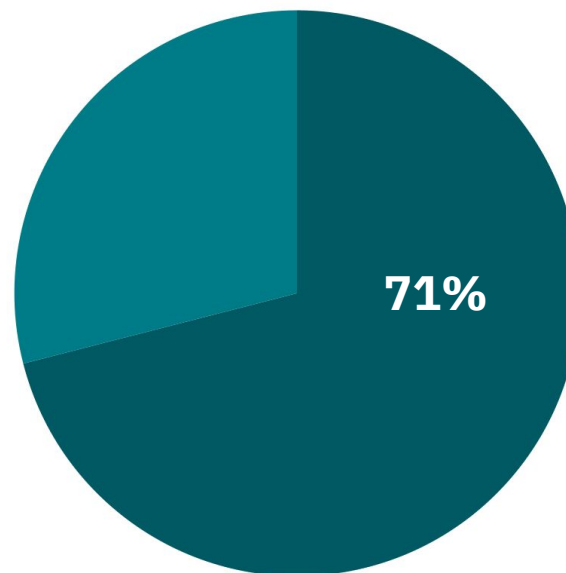
France



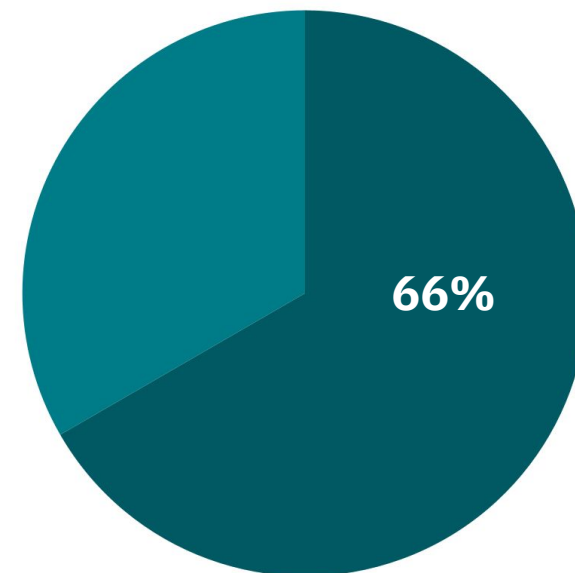
Germany



Italy



Spain



● Agree ● Disagree

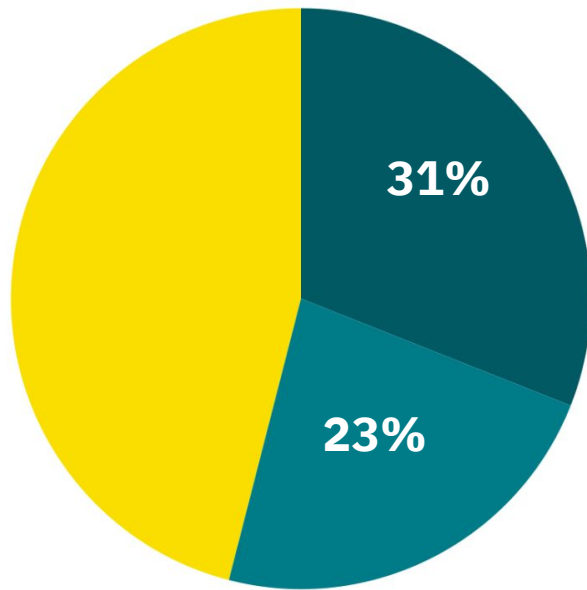
Cultivated meat



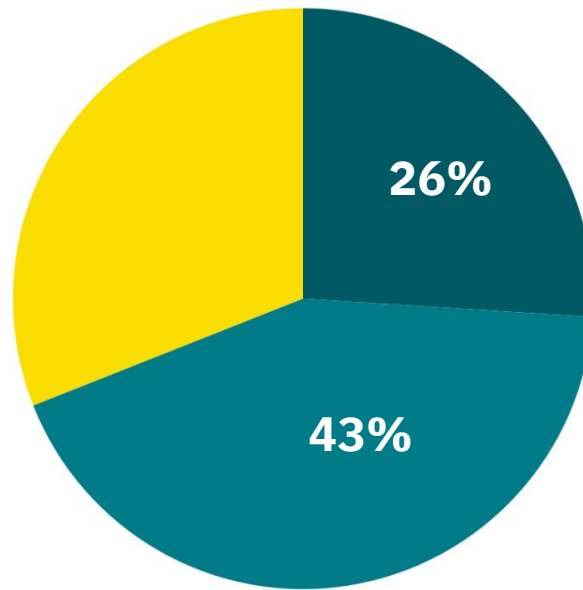
A majority in all countries have heard of cultivated meat

It is possible to create meat from cells taken from a living animal, which grow in fermenters instead of in the animal.
Have you ever heard of this food?

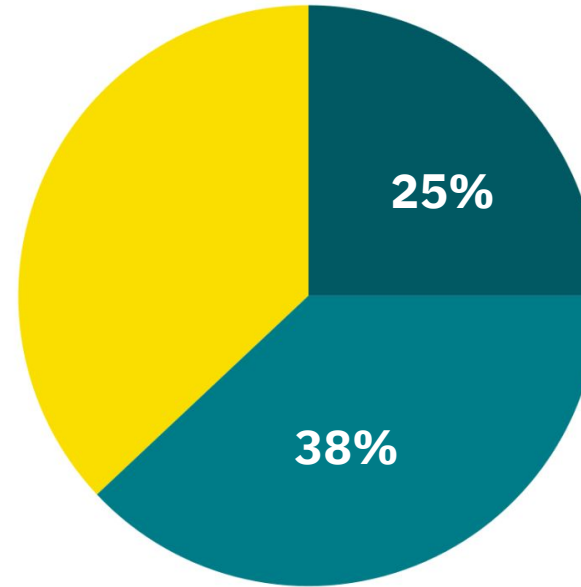
France



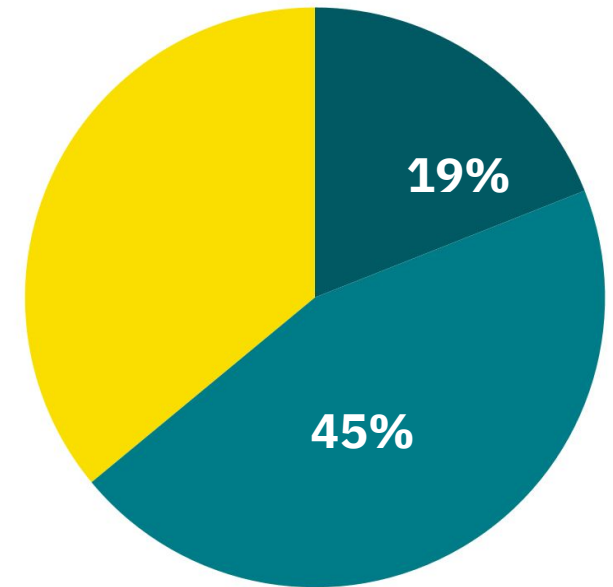
Germany



Italy



Spain

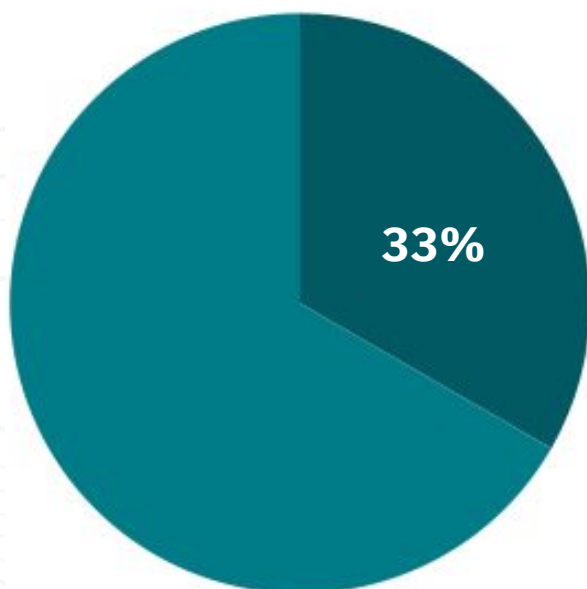


● Yes, and you know exactly what we are talking about ● Yes, but you don't know much about it ● No

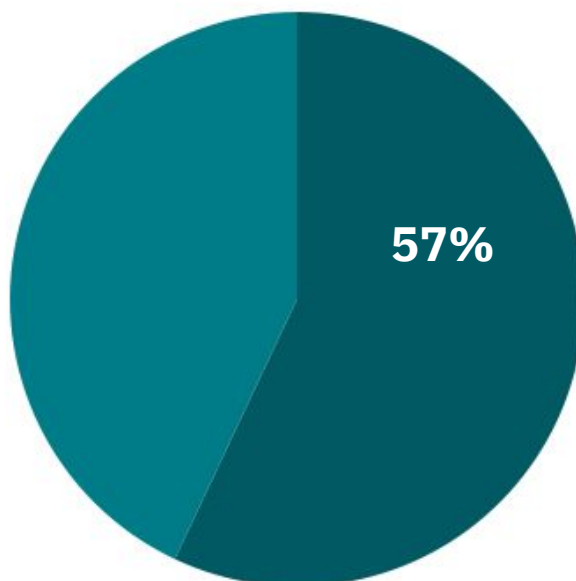
There is a significant potential market for cultivated meat in all countries

In the future, would you buy the food we described if it were available?

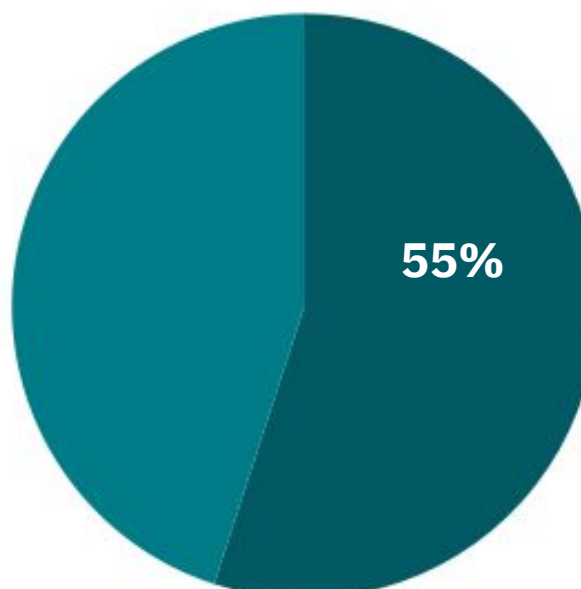
France



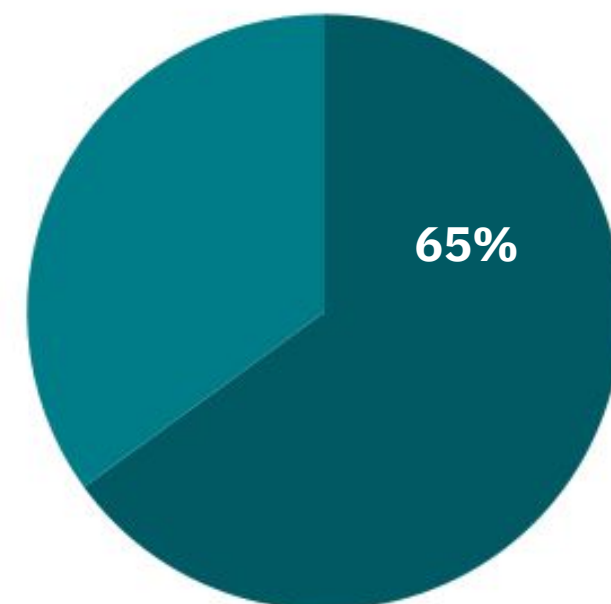
Germany



Italy



Spain

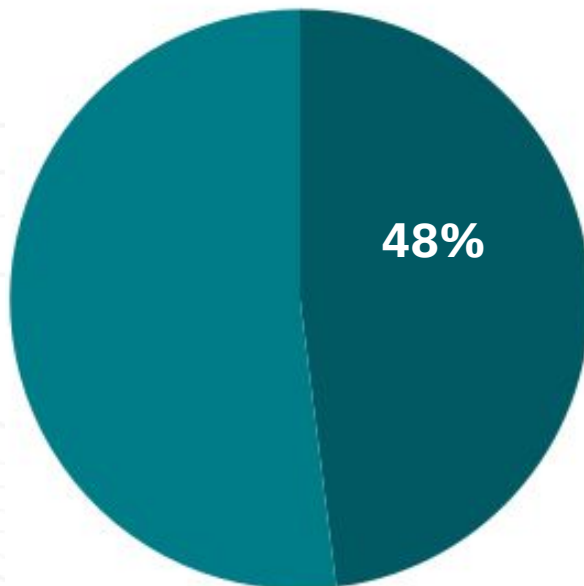


● Yes ● No

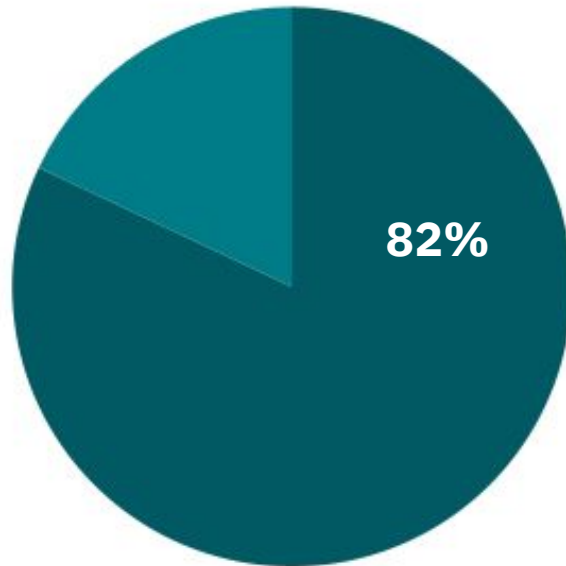
Younger people are even more interested in cultivated meat

In the future, would you buy the food we described if it were available? *Results for 18-24-year-olds*

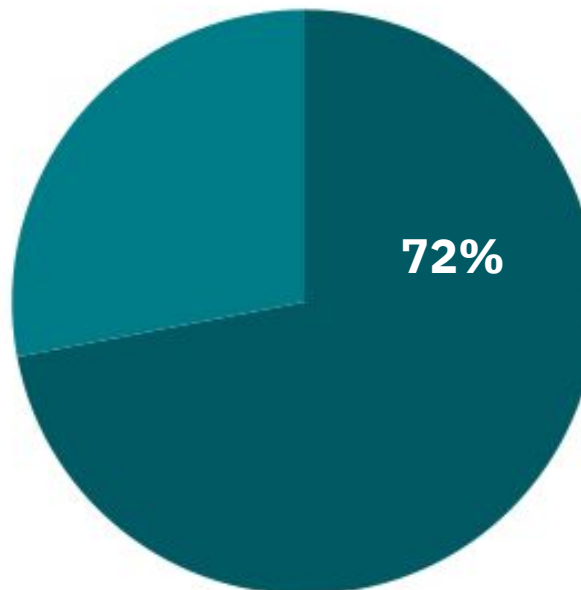
France



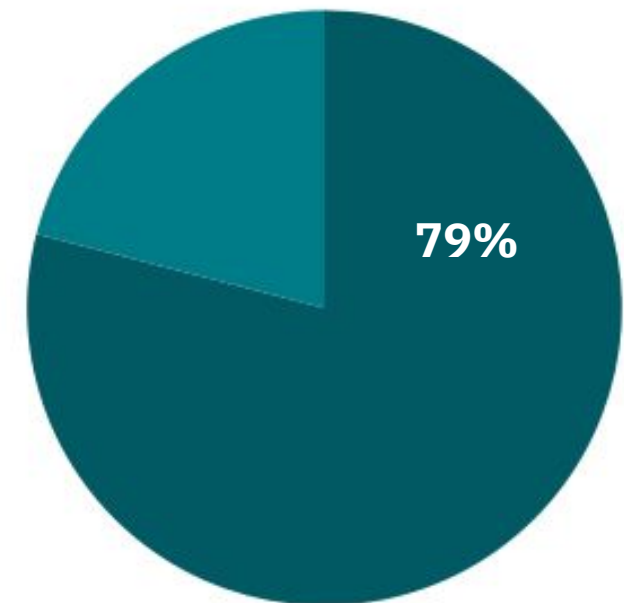
Germany



Italy



Spain



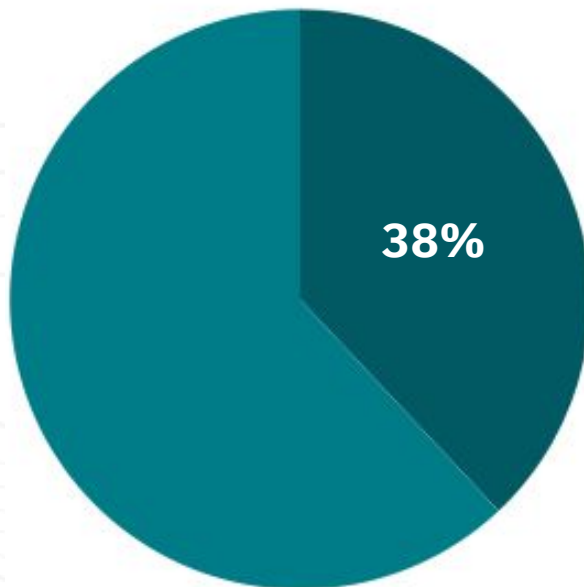
● Yes ● No

A significant proportion of consumers want public authorities to support cultivated meat

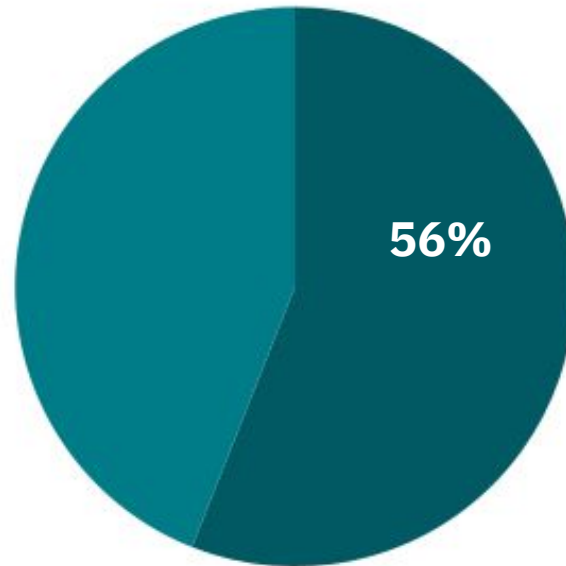
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Do you agree that public authorities must act to support the production of the food we described?

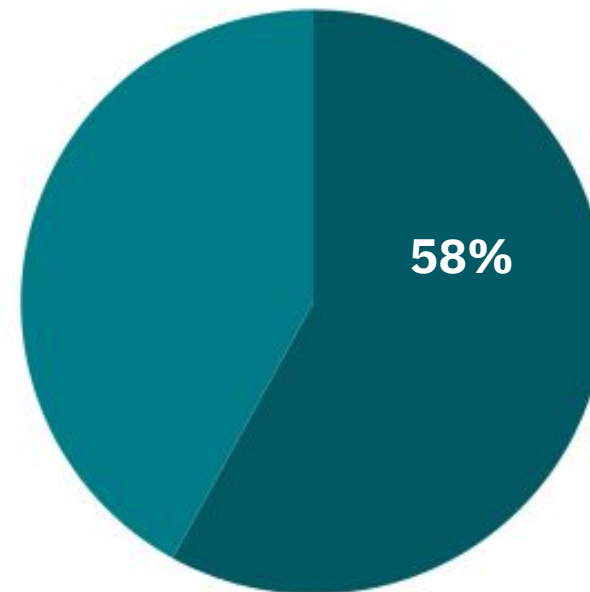
France



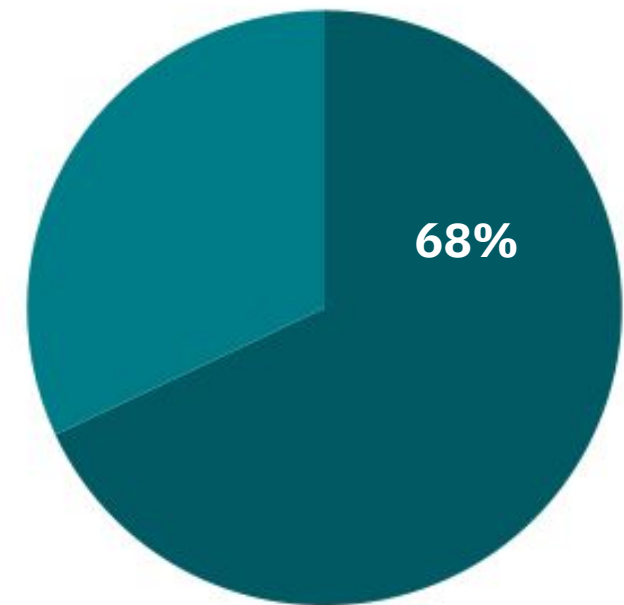
Germany



Italy



Spain



● Yes ● No

Source: OpinionWay survey – representative online survey of 4,096 people in France, Germany, Italy and Spain aged 18 and over

Methodology



Methodological notes

“*opinionway*”

Institute and period:

Online survey by the French opinion research institute OpinionWay as part of a comprehensive survey for France, Germany, Italy and Spain in February 2022.

Population and sample:

The sample sizes were 1,058 for France, 1,002 for Germany, 1,011 for Italy and 1,025 for Spain. Rounding-related sum deviations are possible in the presentation of results. All were over 18, selected to be representative of national populations in terms of gender, age, socio-economic status, and region.

Method:

Participants were interviewed using an online self-administered questionnaire on a computer assisted web interview system in February 2022. OpinionWay conducted the surveys using the procedures and rules of the ISO 20252 standard. The margin of uncertainty for the results is 1.4-3 points.