EXECUTIVE SUMMARY

The present study was co-funded by the Hellenic Vegetarian Association (HellasVeg) and the European Vegetarian Union (EVU) and was conducted on 700 respondents throughout Greece with representative criteria regarding gender, age, and geographic region of residence. The primary research was carried out by Kantar SA during June 2022, and its statistical analysis was performed by HellasVeg's services. The analysis also included a comparison of the results with those of similar studies conducted in other European countries, always co-funded by the EVU, and conclusions were drawn about the differentiation of findings in Greece and the European Union

The main conclusion is that the same stratification of consumers into "food tribes" seen in other countries exists in Greece as well, but with a lower penetration of vegetarianism in the daily life of the Greek consumer. In fact, Greece shows the highest percentage of omnivores among the 11 countries, as 73% of consumers declare that they fall into this category, followed by Poland (68%) and Italy (67%). Similarly, it shows a lower percentage of flexitarian consumers (24%), the same as Poland and Denmark, while only the UK has an even lower percentage (23%).

This study provides an in-depth analysis of the amounts of meat and related foods consumed by participants as well as their responses regarding possible changes in their preferences. It is seen that Greeks consume meat and dairy products more frequently than the average European but approximately the same number of eggs & fish/seafood. Regarding the quantities of meat consumption, it was estimated that flexitarians consume 900-1500 g of meat monthly, while omnivores consume more than double that amount (2250-3350 g). We note that according to the WHO, consuming over 50g of meat daily (that is 1500g per month) increases the risk of colorectal cancer by 18%.

An important finding of the study is that 49% of consumers responded that they have decided to reduce their meat consumption, a percentage that is much lower in the other 3 food categories (dairy 22%, eggs 9%, fish 12%).

Focusing on omnivores, we see that a striking percentage (82%) agree that there are reasons to become vegetarian and mention as the most important reason the improvement of animal treatment, followed by health and the environment. Additionally, 4 out of 10 omnivores say they wish to reduce their meat consumption in the near future. Therefore, this “tribe” is expected to weaken in the coming years, as many of them will join the “tribe” of flexitarians.

Flexitarians, on the other hand, were asked about the consumption of alternative plant-based foods, in order to investigate the consumer behavior of this group, which is the main target of this food industry. Their answers show distrust towards these products and hesitation to try them. Specifically, they mention that the main reasons for not preferring them are the high price (35%), the not-so-good taste (21%), and the lack of sufficient variety of options (21%), but also the concern about how healthy they are (14%).

The above findings suggest tremendous potential for plant-based foods in Greece, provided efforts are made for their further improvement. Finally, based on the prospects emerging within the framework of this study, recommendations are given for the industry. Given the emergence of new technologies on our plate in the coming years, which are currently at an experimental stage, consumers were asked about their willingness to try them.

Our consumers were actually surprised, with 49% stating that they are open to trying cultured meat, while 26% said they would be willing to try food using insect-based protein.

Supermarkets are the main shopping channel, as 5 out of 6 consumers choose them for their daily shopping. Only 7% of respondents choose the local market to buy their food.

The general conclusion is that Greek consumers, regardless of age, gender, and area of residence, although to a lesser extent than most Europeans, have begun to reflect on the need to transition from a mainly animal-based diet to a more sustainable vegetarian diet, while also utilizing new technologies when they become available.