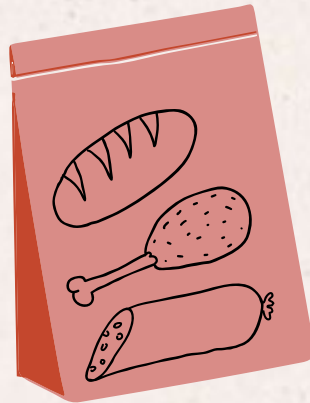
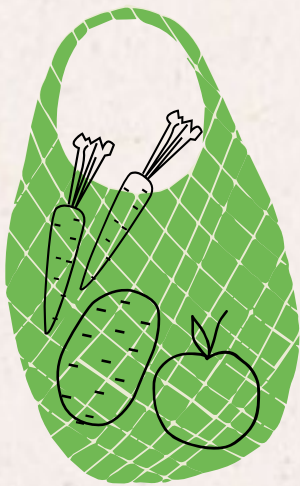




GOOD FOR YOU, BETTER FOR EVERYONE.

VEGANZ NUTRITION SURVEY 2019



CONTEST

1 FOREWORD
.....

2 EUROPE REPORT/KEY FACTS
.....

3 COUNTRY REPORTS

| | |
|-----|---------------|
| 018 | AUSTRIA |
| 032 | CZECHIA |
| 046 | TSCHECHIEN |
| 060 | DENMARK |
| 074 | SPAIN |
| 088 | GERMANY |
| 102 | FRANCE |
| 116 | GREECE |
| 130 | ITALY |
| 144 | CROACIA |
| 158 | NETHERLANDS |
| 172 | POLAND |
| 186 | PORTUGAL |
| 200 | SLOVENIA |
| 214 | GREAT BRITAIN |

.....
4 FACT-SHEET
.....

5 LEGAL NOTICE

FOREWORD

Why are Europeans vegan? What do the Swiss fry up in their pans and which products land in the shopping carts of Portugal? Does the recent climate debate have an effect on what food people buy? And to what extent do vegans differ from omnivores when it comes to their daily dietary choices?

Questions upon questions that have been swirling around in our brains for a while now. Questions we finally have answers to. Answers that show and help us understand what motivates people in Europe to make certain decisions in front of their supermarket shelves and what influences or moves them.

How did we arrive at these answers? On the occasion of World Vegan Day 2019, we decided to conduct a Europe-wide online survey. In order to provide a comparison of results, country of origin and the test person's diet choices played a major role. We also wanted to dig a bit deeper into the subject matter and so, in addition to the classic questions regarding nutrition and food purchases, we asked each participant about their attitudes on environmental protection, health, etc. This is how we found out that, for example, 86 % of European vegans said they consider sustainability and environmental protection very important when purchasing food – 13 % more than the people who do not eat a purely plant-based diet.

On the following pages you will find a number of our findings. First, we'll give you a general overview then delve deeper into each country and reveal some of their typical national characteristics. Why did we decide to conduct this online survey? As a brand with a full range of vegan products, we work every day towards our goal of motivating people around the world to eat plant-based foods and treat our environment responsibly. It's the most effective thing we can do to create a sustainable future on our planet for all living beings and was the purpose of our recent re-organisation as Veganz Group AG. With the results at hand, we are now able to get to know the people and understand their needs. After all, this is the only way we can continue to live up to our goals for the future.

So, have a good time reading, discovering and learning!

Jan Bredack
CEO Veganz

EUROPE REPORT KEY-FACTS

Why are Europeans vegan? What do the Swiss put in their frying pans and what kinds of products land in Portuguese shopping carts? On World Vegan Day 2019, we wanted to take a closer look at the European people and find out more about their diet and their eating and shopping habits in those respective countries. And by the way, we did the survey on our own – without a third, without a market research institution.

First of all, we are especially thankful and proud that a total of 24,000 people from 15 different countries took part in the study - a truly fantastic result! We found it particularly interesting to find out what kind of diet the respondents had. The results are:

33,7 % VEGAN
22,8 % FLEXITARIAN
23,5 % OMNIVORE
14,1 % VEGETARIAN
5,9 % PESCATARIAN

In order to ensure the demographic distribution and gender corresponded to the European population, we compiled a cross-sectional sample of 3,000 participants in additional study results. The proportion of men and women is roughly the same. Nearly 30 % of the test persons are from Germany, the rest are distributed across other European countries.

FROM FOOD SHOPPING TO VALUES AND CERTIFICATIONS

What do Europeans look for when purchasing food? Why do certain products see the light of the refrigerator and others have to go back to their friends on the shelf? We also wanted to know what values are hidden behind a vegan diet.

„VEGANS ARE THE BODYGUARDS OF THE CLIMATE!“

A whopping 86 % of European vegans said they put great importance on sustainability and environmental protection when choosing what foods to buy – 13 % more than those who do not consume a purely plant-based diet. In fact, in Switzerland and Austria it's 95 %.

And if a vegan goes for a plant-based substitute, such as veggie schnitzel or various fish alternatives along with their carrots, the following rule of thumb applies: Taste, quality and sustainability have top priority!

Therefore, it's hardly a surprise that the number 2 motivational aspect for a vegan diet are environment and sustainability, followed closely by animal welfare. In fact, in the Czech Republic, it's the most frequently cited motive.

To what extent do the following statements apply?

1
2
3
4
5
 1 absolutely does not apply
 5 absolutely apply

100% 50% 0% 50% 100%

I place great value on sustainability and environmental protection when purchasing food



I respect & trust certain certifications and labels



I prefer buying certified organic items



I purchase seasonal fruit and vegetables



Regionality plays an important role



FROM FOOD SHOPPING TO VALUES AND CERTIFICATIONS

For 74 % of European vegans, certifications, Fairtrade or FSC are very important, while 72 % place a high value on certified organic products. German vegans in particular put their utmost trust in certifications, as do Danish and Dutch vegans. From this one can easily conclude:

„VEGANS ARE LOYAL CERTIFICATE FANS!“

The answers from non-vegans are completely different. Just about half pay attention to labels, including the organic certification. Based on these conclusions, it's more than logical that almost 80 % of vegans buy their food at health food stores and organic markets – that's almost 20 % more than with the other forms of nutrition! In France it's 97 % of almost all vegans asked. There are considerably fewer organic lovers in Poland. The certification is important for just 45 % of vegans and the health food store is visited much less frequently.

In this context, regionality and seasonality of products are also decisive factors when making purchases. In Greece, all vegan participants indicated that they buy fruit and vegetables according to the seasons.

VEGAN THROUGH AND THROUGH

85,7 % of the vegans asked live a 100 % vegan lifestyle. Not only do they have plant-based products in their fridge, but cruelty-free clothes hang in their closets and vegan cosmetics are in the bathroom. Hence:

„VEGANS DON'T DO ANYTHING HALFWAY!“

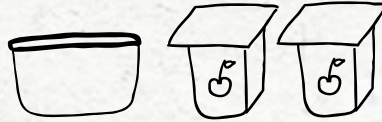
Vegan Nuggets, Vishsticks and Mozzarella? Bring it on! Most vegans are open to substitute products: 88,1 % of our vegan participants are happy to replace meat, milk and cheese with a plant-based alternative. In Portugal it's even nearly 93 %. At the top of the list are milk alternatives, with meat and plant-based yoghurt and curd a close second.

By the way, only 30 % of European vegans took the direct route to becoming vegan. Almost 70 % were vegetarian first. The women and men from Greece were a bit more drastic: Half of all vegans decided on a vegan lifestyle without any transition period at all.

80,8 %



69,4 %



52,7 %

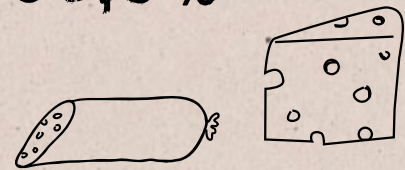


What products do you use as a substitute?

71,9 %



60,5 %



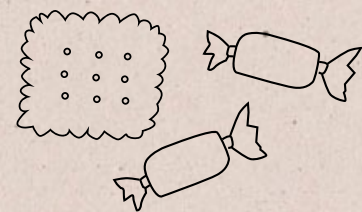
20,6 %



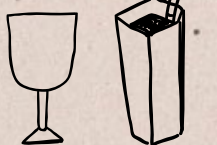
24,1 %



56,5 %



17,2 %



YES OR NO: IN-VITRO MEAT, LAB CHEESE AND CRAWLING CREATURES

When asked, animal welfare was the number one reason why Euro vegans don't consume animal products. Especially the Dutch and Spanish vegans have a soft spot for the furry ones: Every one of them stated here that they (among other things) are vegan because of their love for animals.

„VEGANS STAY TRUE TO THEIR VALUES!“

Especially when it comes to the nutrition of the future. Only 24 % could imagine eating in-vitro meat bred in the laboratory while omnivores counted at over 36 %. There was a slight difference when it came to laboratory cheese: 49 % of European vegans see this as a real alternative as opposed to omnivores with just 39 % in agreement. They were more critical and would rather eat the 'real' thing.

Mealworms, crickets and grasshoppers? No, thanks! 93,2 % of European vegans see insects as living beings as well and have no place in the diet. For the rest, 6,8 % can imagine the little animals as being an alternative.

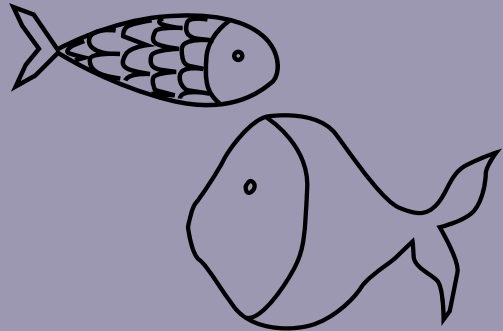
83,9 %

**ENVIRONMENT &
SUSTAINABILITY**



95 %

**ANIMAL
PROTECTION**



55,9 %

**HEALTH
REASONS**



17 %

TASTE



**Why are you
vegan?**

3,8 %

**RELIGIOUS
REASONS**

2,5 %

INTERESTED

3,7 %

OTHERS

31,5 %
MAGAZINES
& NEWSPAPER



79,4 %
SOCIAL MEDIA



**Where do you get
your information
about nutritional & trends?**

18,9 %
CONVEN-
TIONS

8,5 %
TV



31,5 %
SUPERMARKET



5,1%
NONE

53,37%
BLOGS



58,4 %
FRIENDS



ON DIY MEALS AND EXPLORING NEW PRODUCTS

Everything tastes better at home, doesn't it? Almost half of all vegans agree: 46,3 % wield the cooking spoon themselves daily, 29,7 % at least 5 times a week. This is particularly noticeable in Austria, Switzerland and Croatia where vegans, in particular, stand quite often in front of the stove.

„VEGAN IS AS VEGAN DOES.“

It's a bit different for veggies and omnis: Just 38 % prepare their meals fresh daily and almost 4 % cook at home less than once a week - or not at all. And when it comes to finding out about new dietary trends and innovative products, vegans have a clear preference: In addition to social media und online blogs, they prefer exchanging information with friends. On average, however, preferences are somewhat more distributed. The same is true for non-vegans. In addition, all types of diets find out what could end up on their plates next from magazines, newspapers or directly from the supermarket.

HEALTH AS A MOTIVATOR AND PRODUCT WISH LISTS

For Vegans, when it comes to food, health is more important than freshness. With other nutrition groups it's the other way around, although the proportion of people with some sort of food intolerance among non-vegans is higher. Over half of all participants who eat a strictly plant-based diet all agreed:

**„THE VEGAN DIET IS
THE HEALTHIEST DIET.“**

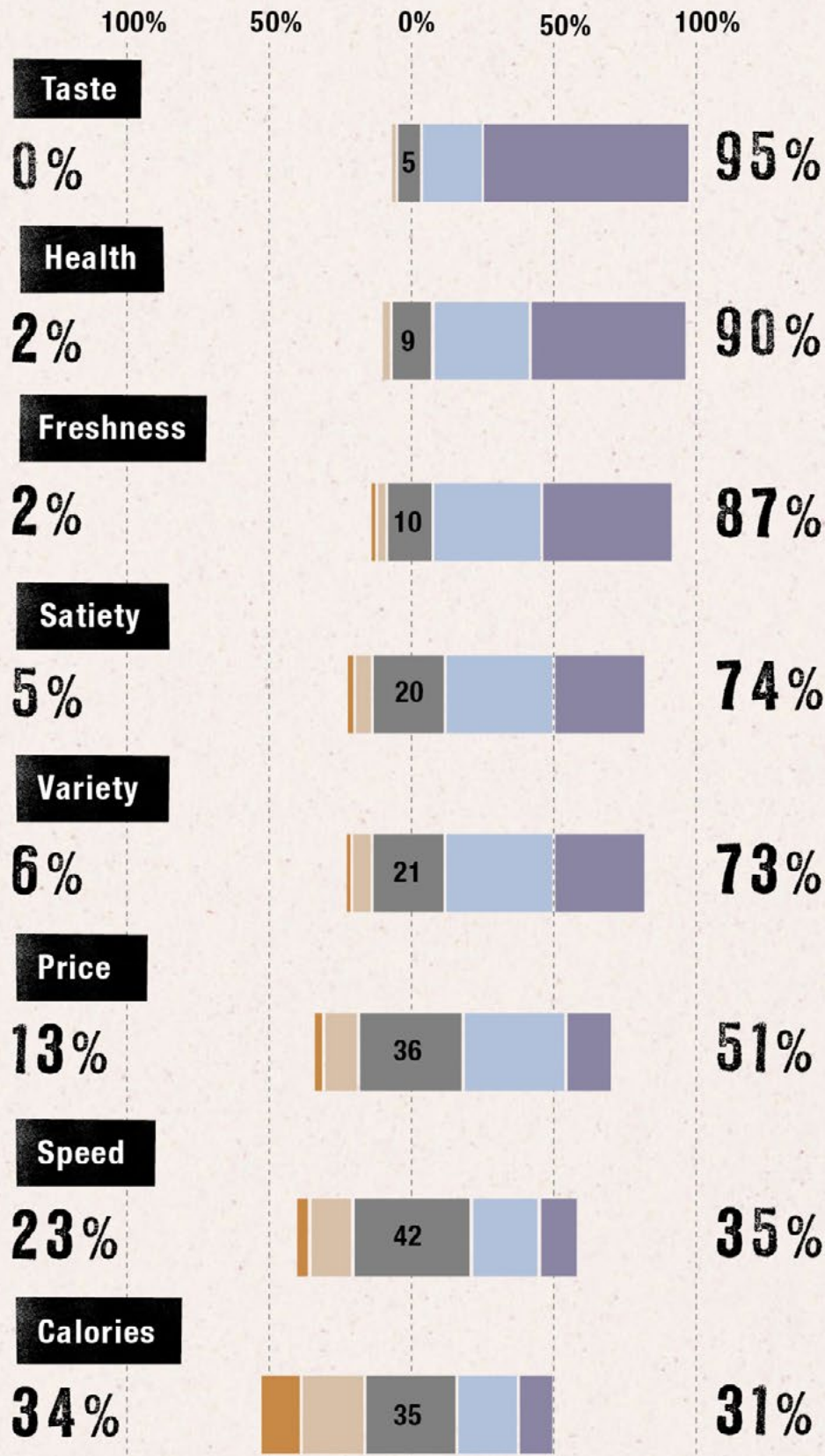
In addition to the environmental and animal welfare aspects, health reasons are an important factor in avoiding animal products completely. But being vegan in and of itself is not necessarily sufficient in covering the need for a healthy diet. 88 % of European vegans also look at the ingredients of purely plant-based substitutes before buying them. In France and Italy, all participating vegans pay attention to high quality with their vegan products as well as an above average value on taste. If you take a look at the European vegan's product wish list, this is what their cry for help sounds like:

**„MORE BAKED GOODS, PLEASE, AS
WELL AS CURED MEATS AND
CHEESE ALTERNATIVES!“**

A whopping 78,1 % of Croatian vegans miss sausages and cheese the most and would like to see a larger variety in the vegan cold cut section. 82,4 % of all Brits said they would like to see more baked goods substitutes. In Greece it's a bit different: Here they would like to have more variety when it comes to vegan sweets and snacks.

Which of the following criteria are important for you when it comes to food?

1 2 3 4 5 1 unimportant 5 very important



PERSPECTIVE

.....

We're very encouraged by the work we've done in the last few years and are just as inspired by all the input and insights – we never would have been able to do it without so many participants and for that we are eternally grateful.

Our customers want new products, environmental protection and sustainability? We do, too! Which is why we will continue to focus on vegan, environmentally friendly and, above all, tasty new products in the future. We won't stop and will continue on the centrifugal path of plastic packaging - until the search becomes a discovery and we have found the best and most environmentally friendly packaging alternative for our products.

Furthermore, far into the distant future we will continue to be committed to transparency in the food industry, i.e. the environmental performance of our products will continue to be shown on the packaging. This is the most accurate way to see how sustainable our products are. As a result, we make it particularly easy for our fans to decide which product is most delicious while at the same time doing something good for the environment.

.....

COUNTRY REPORTS

AUSTRIA

When asked about their average net income, almost 33 % of Austrians interviewed stated they made € 1,500 - 2,000. A further 22 % have an average income of 2.000€ bis 3.000 €.

Almost 98 % state that animal welfare is a key issue. 87 % are vegan for environmental reasons and 68 % feel that a vegan diet has a positive effect on health. More than half of Austrian vegans cook themselves at least 5 times a week. And an entire 36 % of the people surveyed cook fresh food every day. With the non-vegans it looks a bit different: Just about 6,1 % cook less than once a week. However, here too, a majority of the population go to the stove at least three times a week.

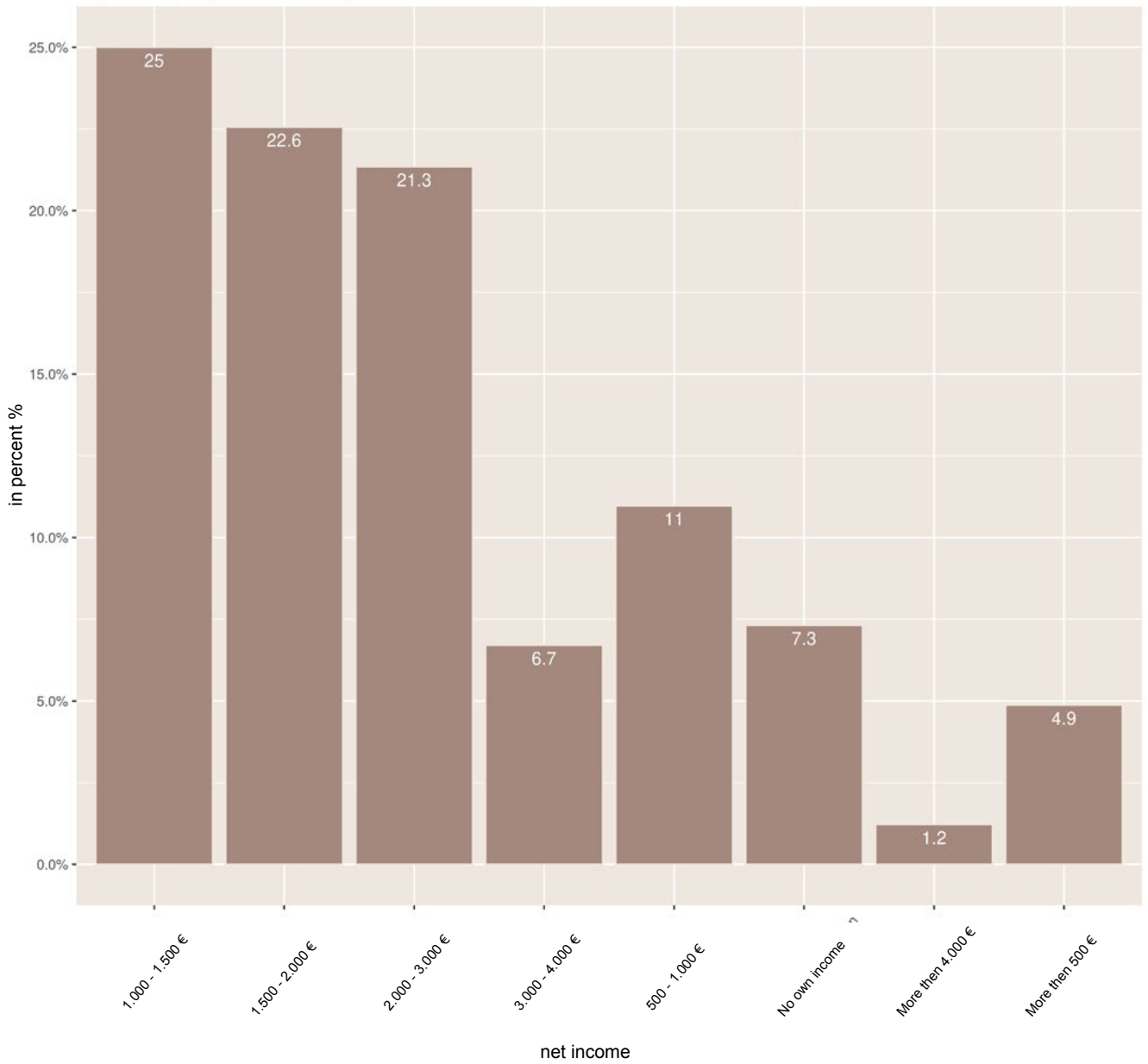
When it comes to informing themselves about nutrition trends and product innovations, 79 % of Austrian vegans prefer social media followed by 58 % who like the exchange with friends. In contrast, the other food groups are somewhat more evenly spread out. In these cases, online

blogs, magazines and newspapers, as well as direct information in the supermarket itself, are relatively more suitable.

Ways seem to party significantly in regard to food purchases. In addition to the supermarket, Austrian vegans like to shop at health food as well as drug stores. These two options are rarely taken into consideration by non-vegans. When choosing vegan food, Austrian vegans take taste, quality and sustainability into consideration. Innovation is rather unimportant, as is brand recognition, playing a role for only 9 % of the participants.

As far as baked goods go, 62 % of Austrian vegans would like to see more variety. There are big differences between vegans and non-vegans when it comes to shopping. For non-vegans, regionality is a top priority. On average, this is the least important aspect for vegans, attaching particular importance on sustainability and environmental protection.

What is your net monthly income?
Veganz asked, austria answered.

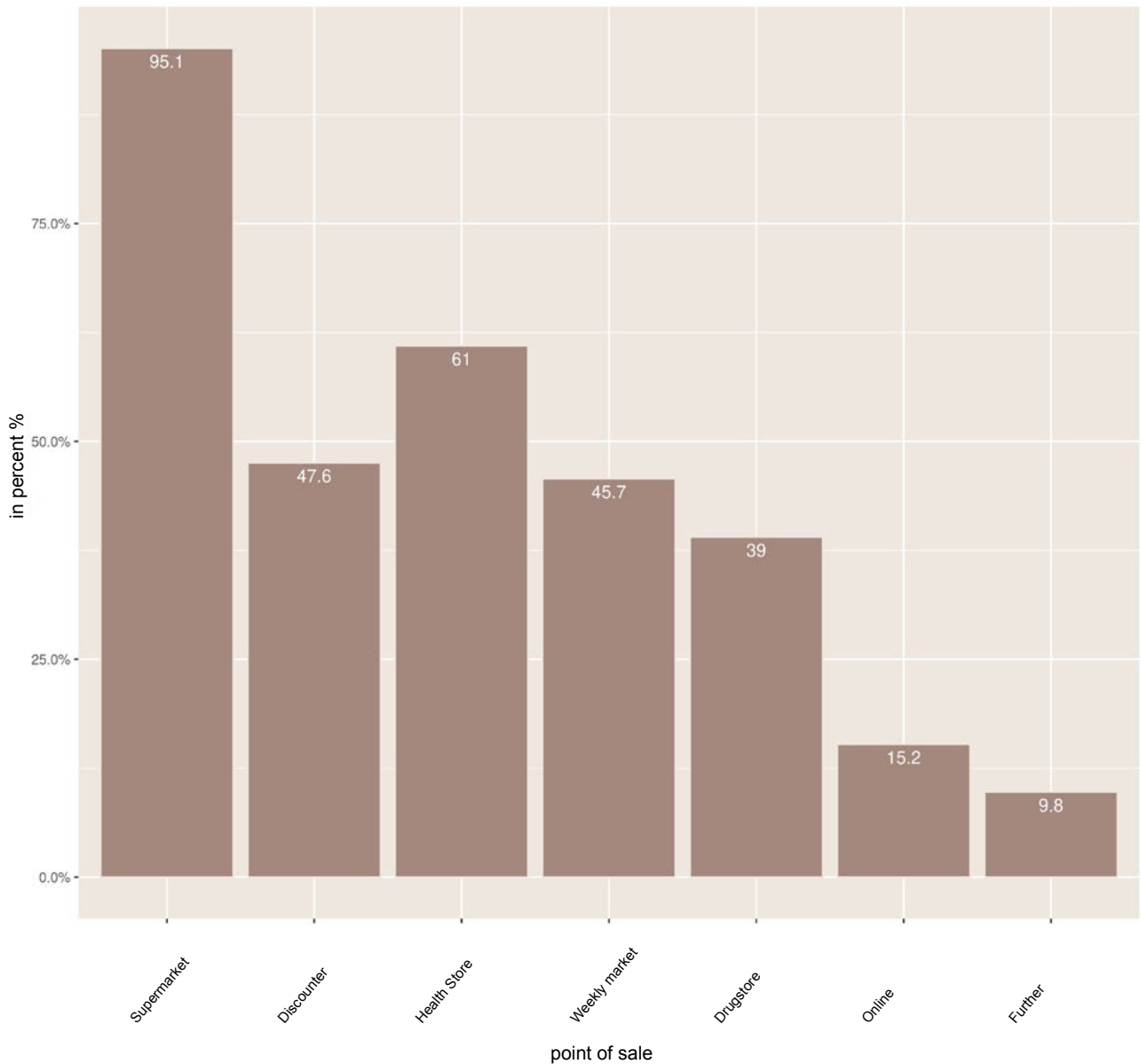


Source: Veganz Nutrition Survey

AUSTRIA

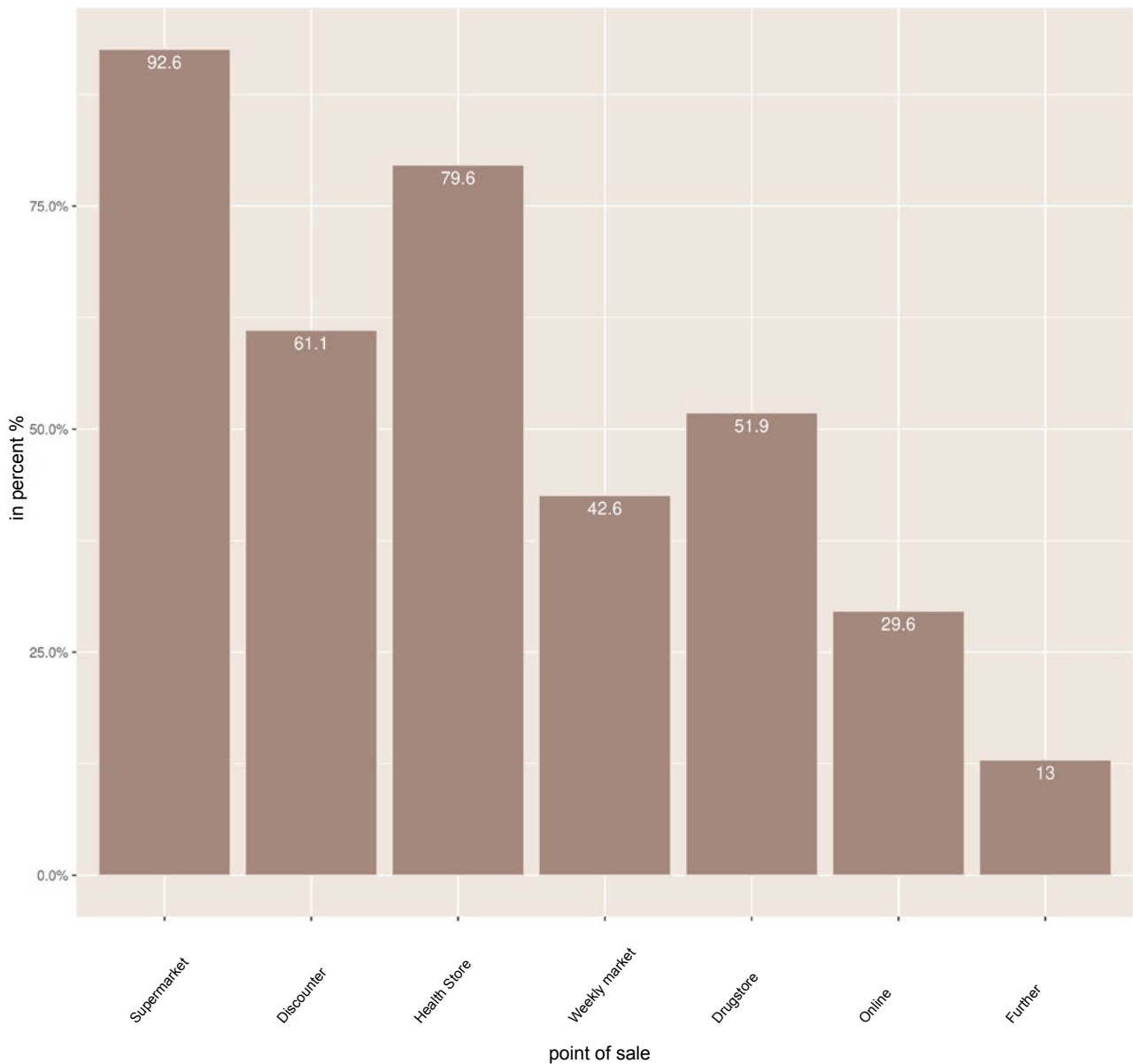
NON-VEGAN

Where do you buy food?
Veganz asked, austrian non-vegans answered.



Source: Veganz Nutrition Survey

Where do you buy food?
Veganz asked, austrian vegans answered.

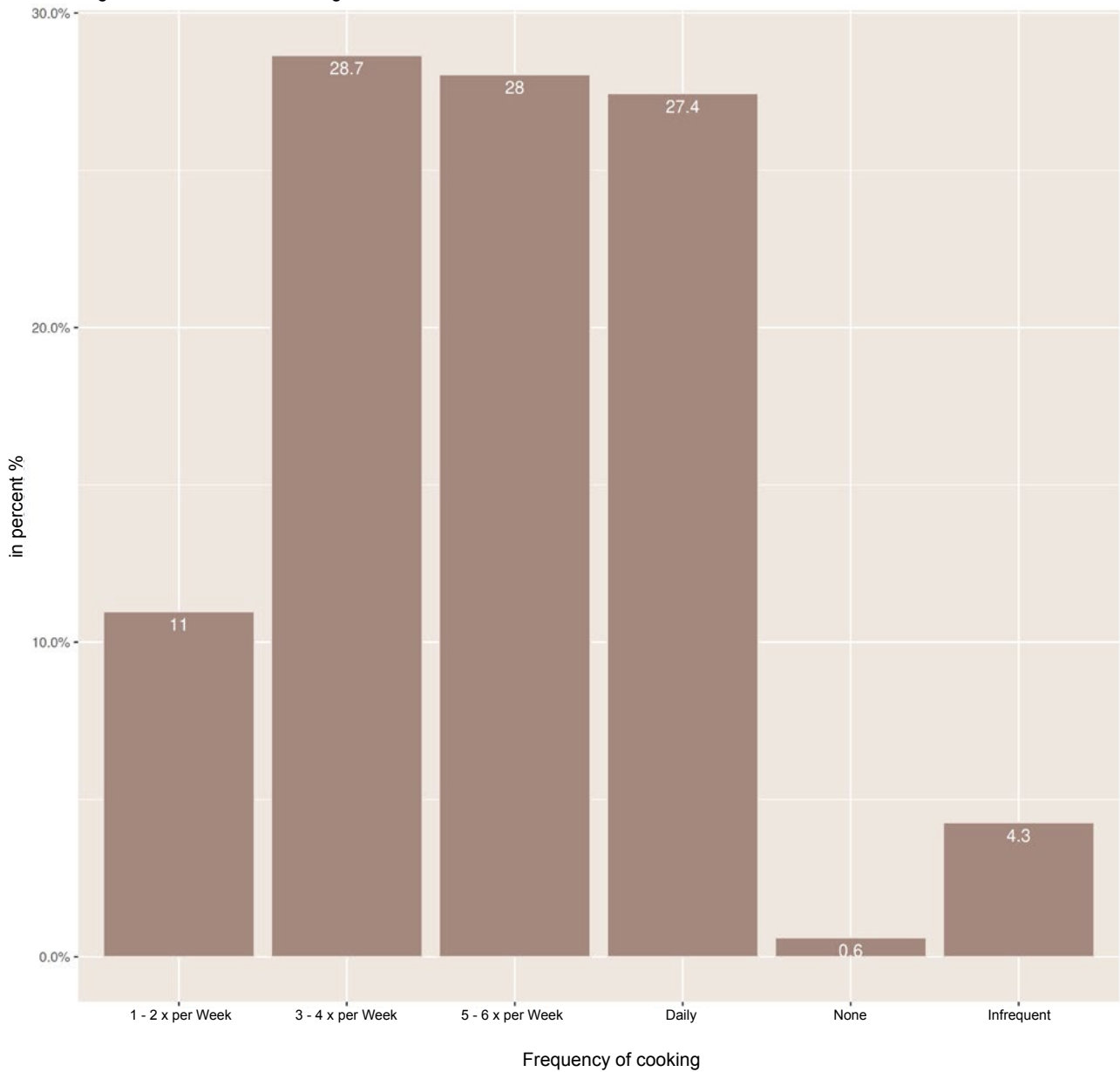


Source: Veganz Nutrition Survey

AUSTRIA

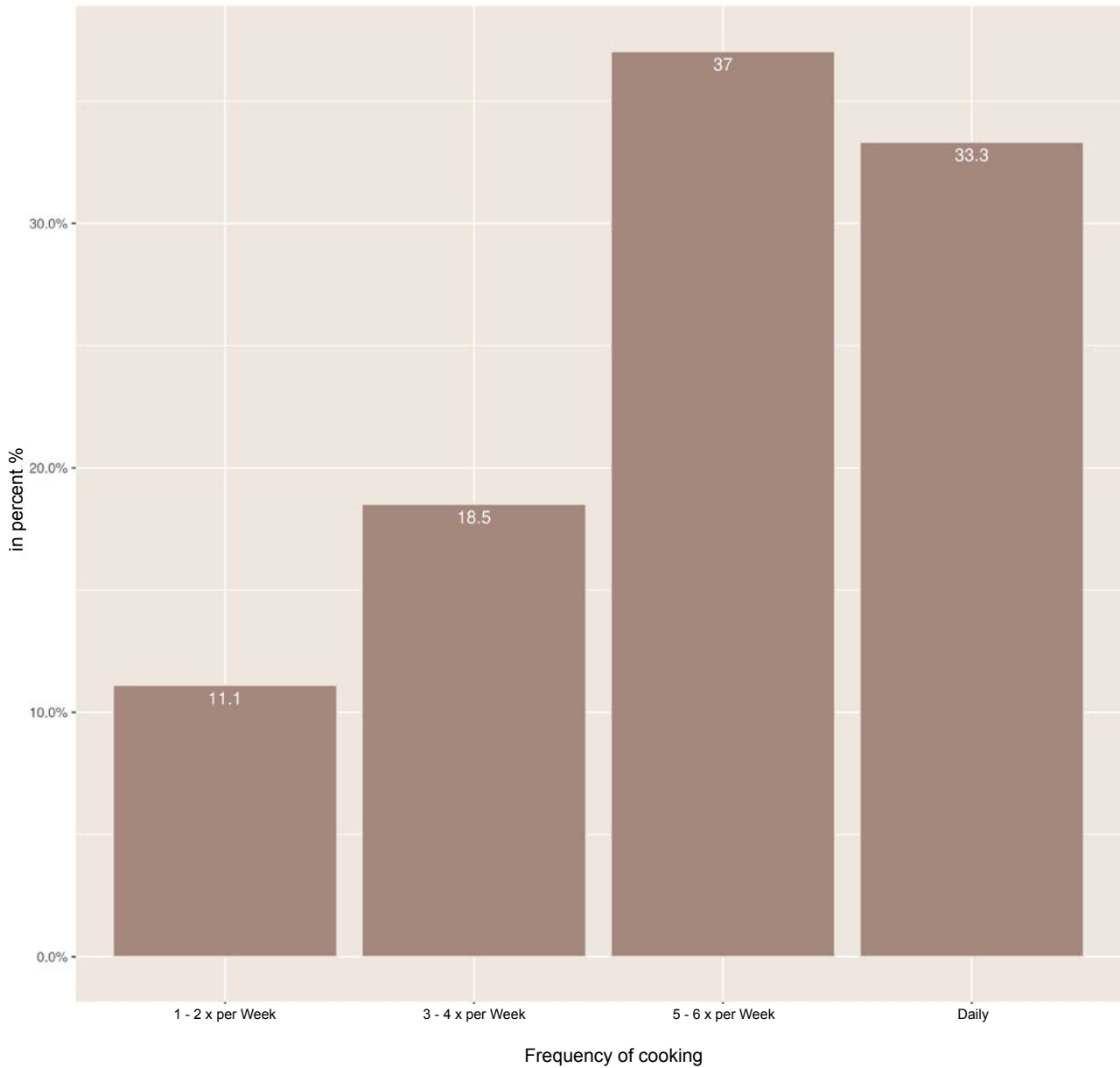
NON-VEGAN

How often do you cook?
Veganz asked, austrian non-vegans answered.



Source: Veganz Nutrition Survey

How often do you cook?
Veganz asked, austrian vegans answered.

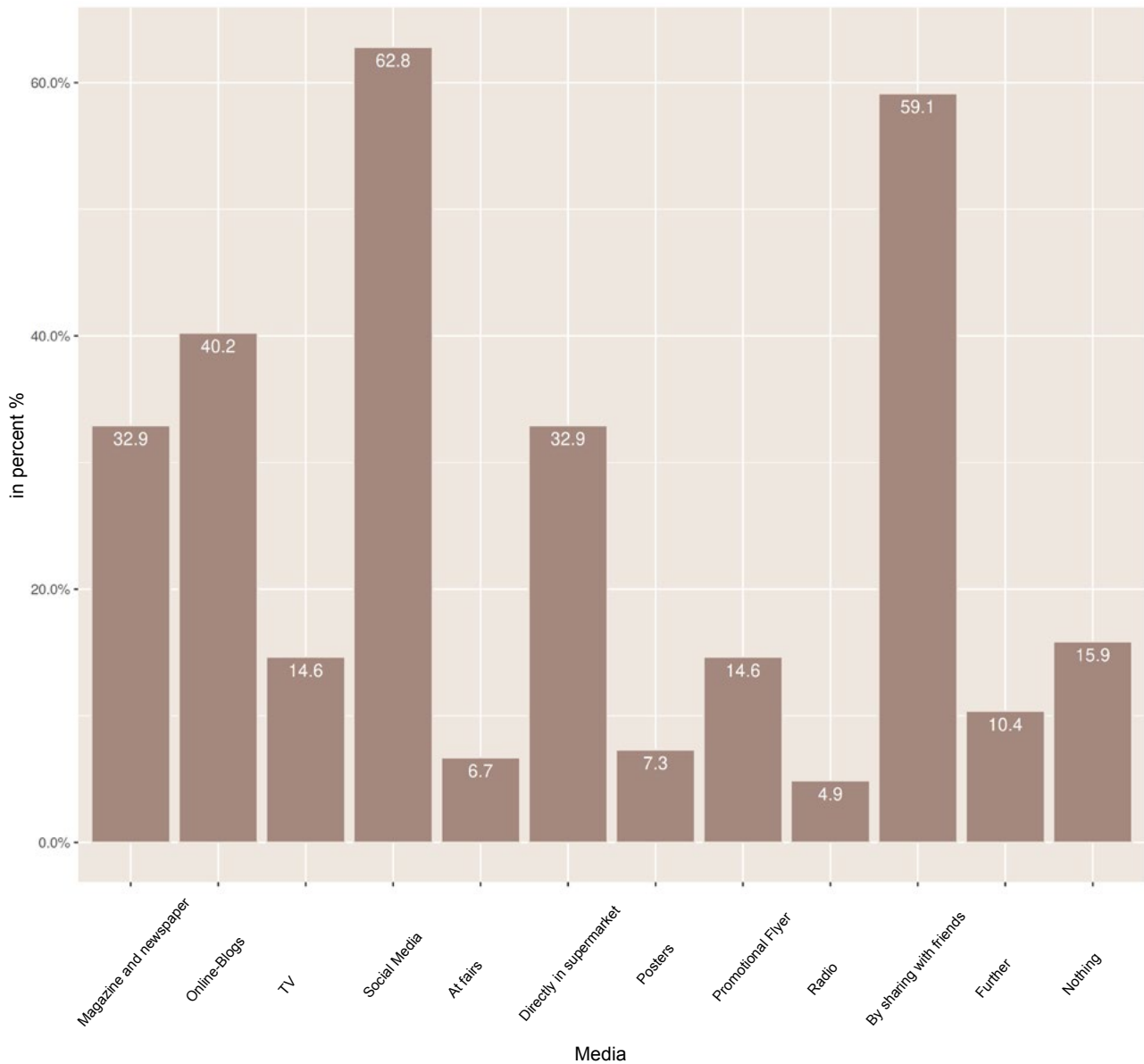


Source: Veganz Nutrition Survey

AUSTRIA

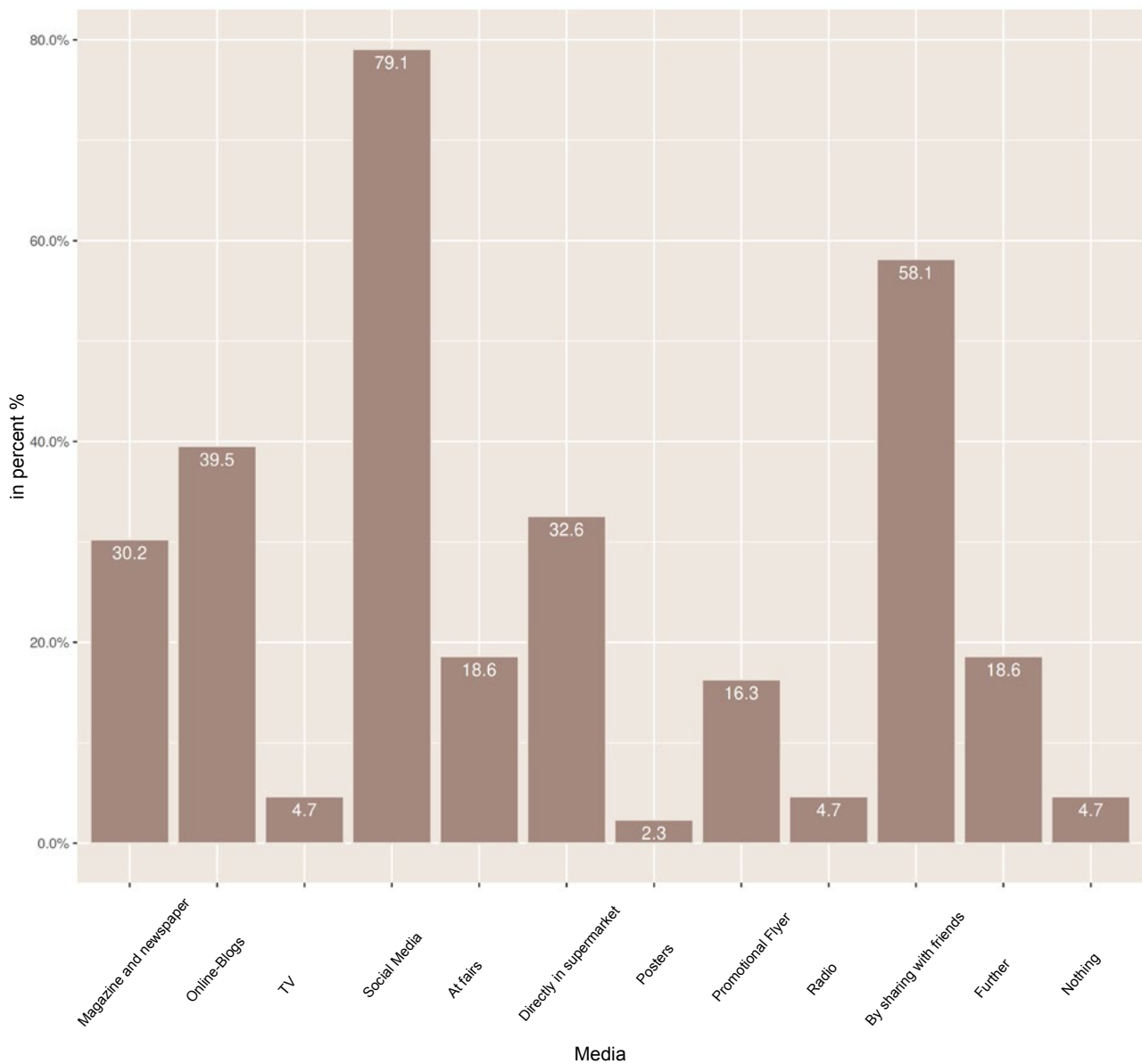
NON-VEGAN

Where do you find information about dietary trends and product innovations?
Veganz asked, austrians non-vegans answered.



Source: Veganz Nutrition Survey

Where do you find information about dietary trends and product innovations?
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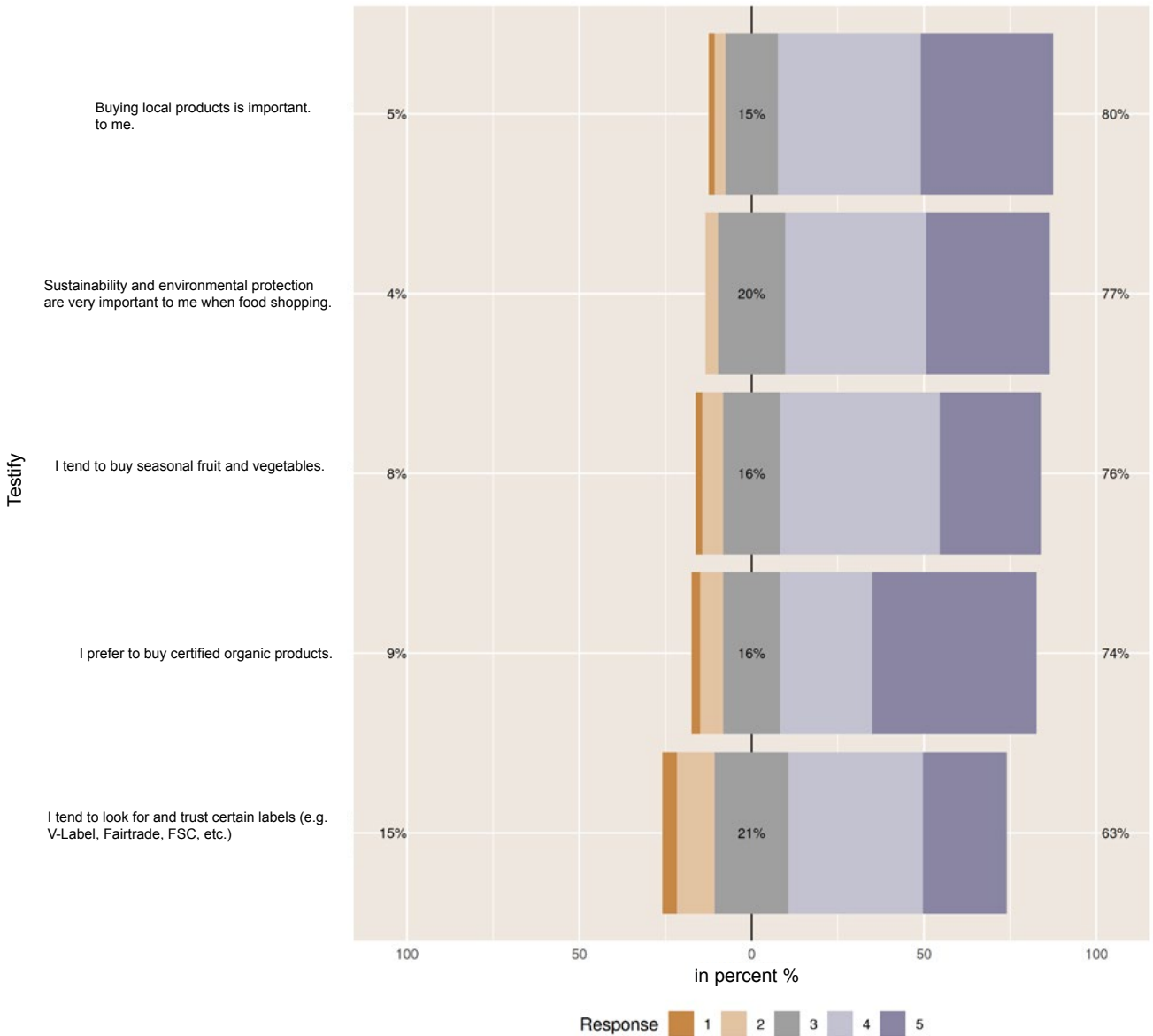


Source: Veganz Nutrition Survey

AUSTRIA

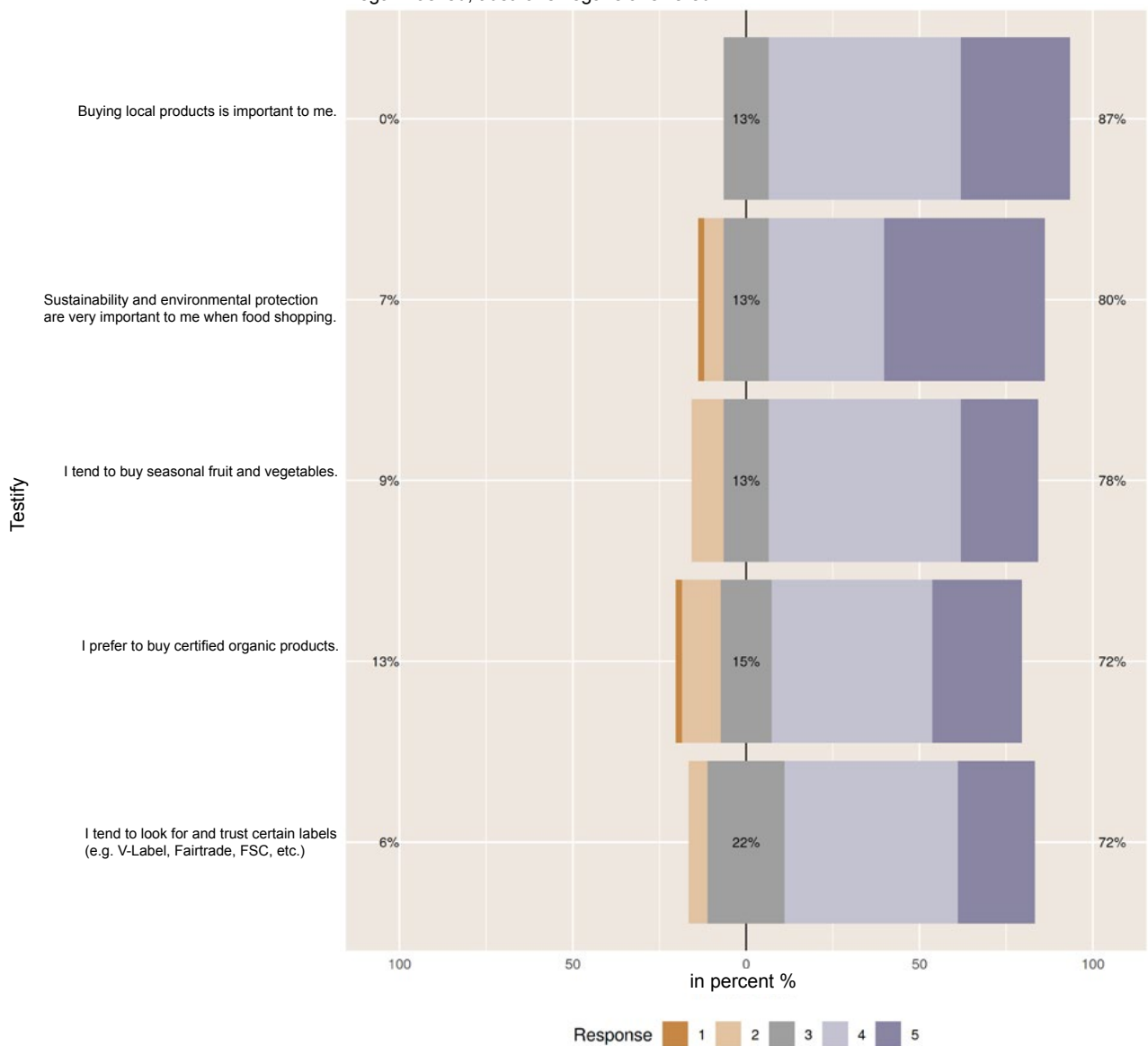
NON-VEGAN

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 Veganz asked, austria non-vegans answered.



Source: Veganz Nutrition Survey

To what extent do the following statements describe you?
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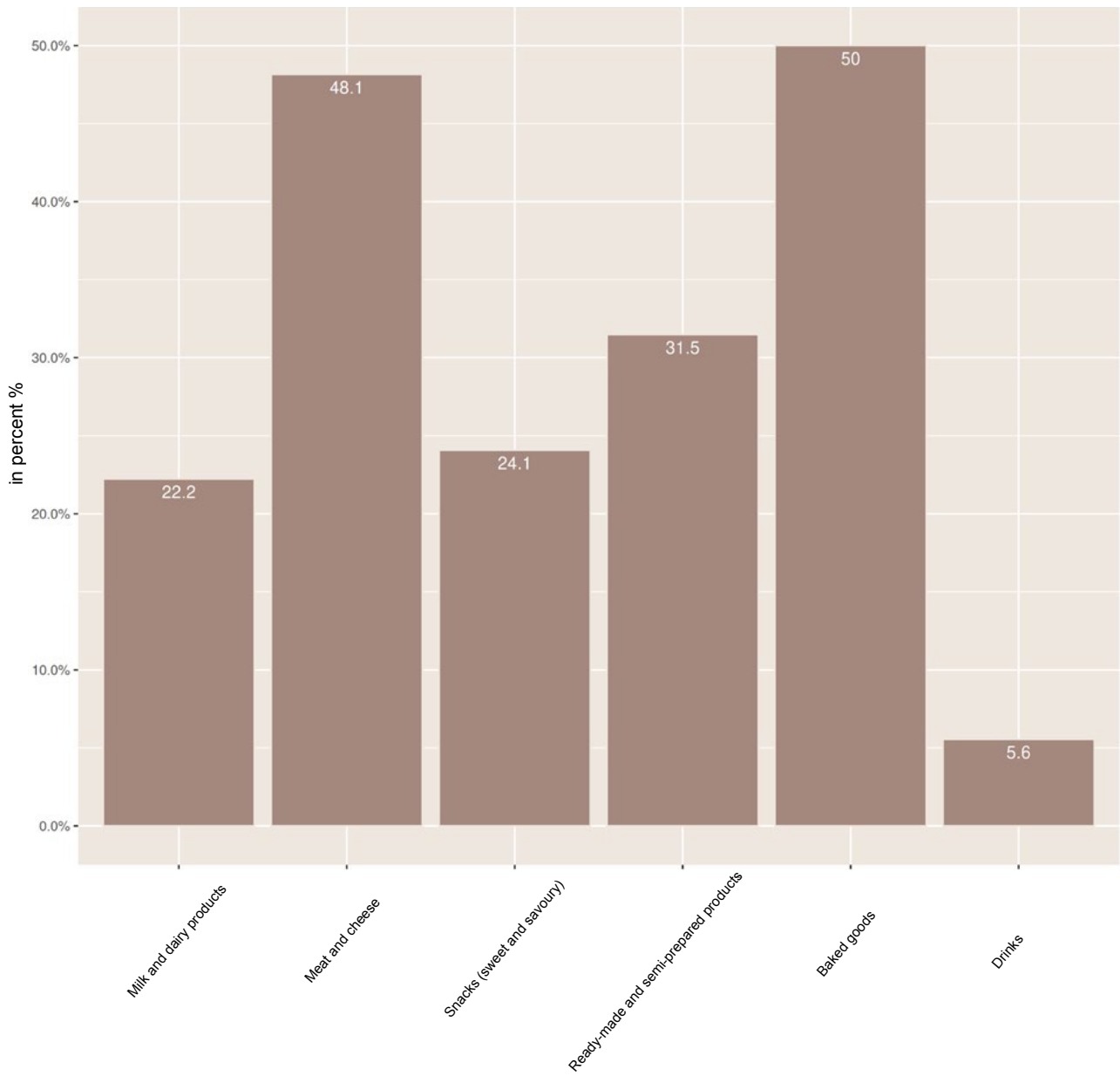


Source: Veganz Nutrition Survey

AUSTRIA

VEGAN

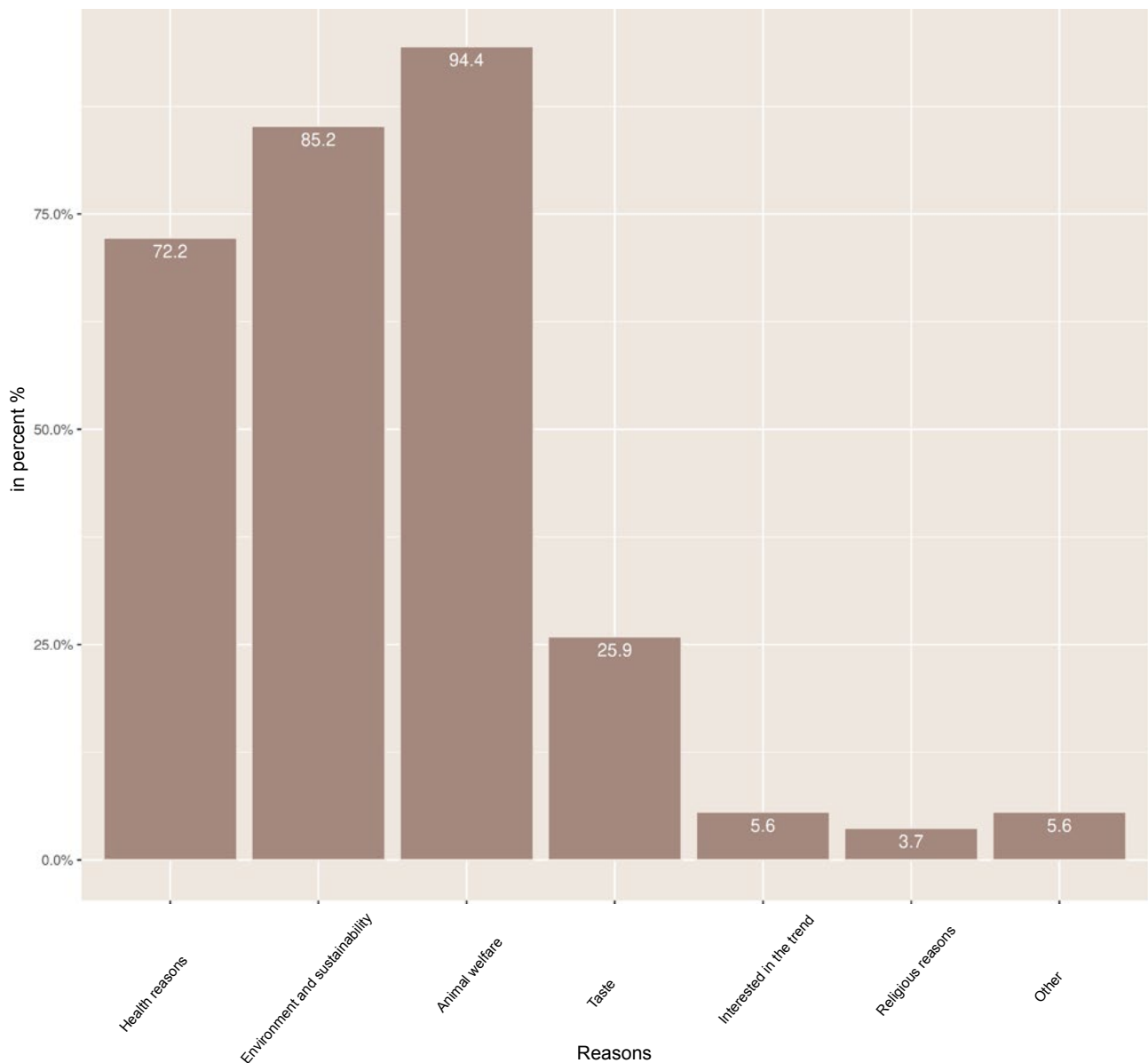
What type of vegan alternatives would you like to see more of?
Veganz asked, austrians vegans answered.



Media

Source: Veganz Nutrition Survey

What are your reasons for eating vegan?
Veganz asked, austrians vegans answered.

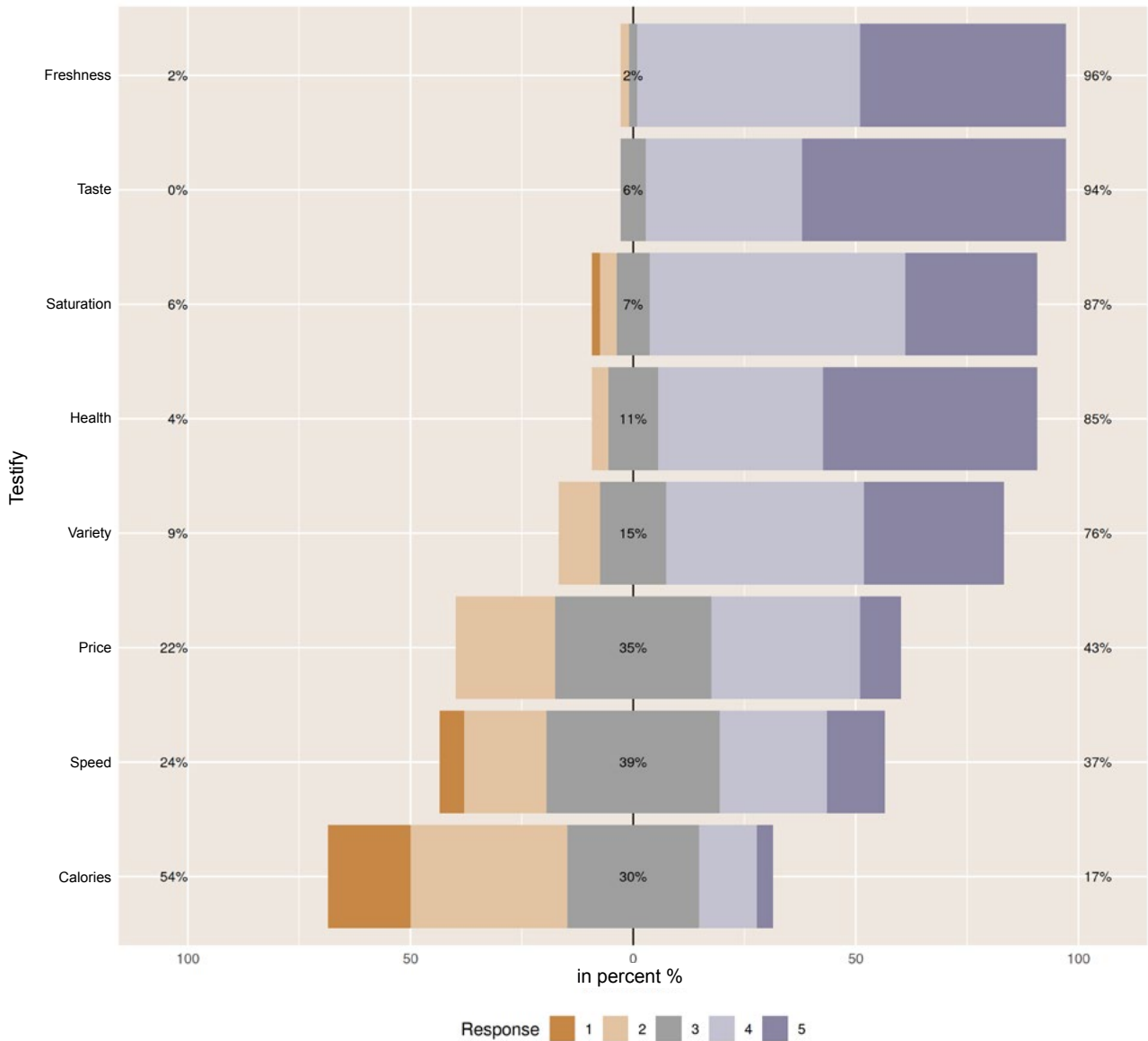


Source: Veganz Nutrition Survey

AUSTRIA

VEGAN

How important are the following factors to you when it comes to food?
 Scale of 1 "Very important" to 6 "Completely unimportant"
 Veganz asked, austria vegans answered.



Source: Veganz Nutrition Survey

SWITZERLAND

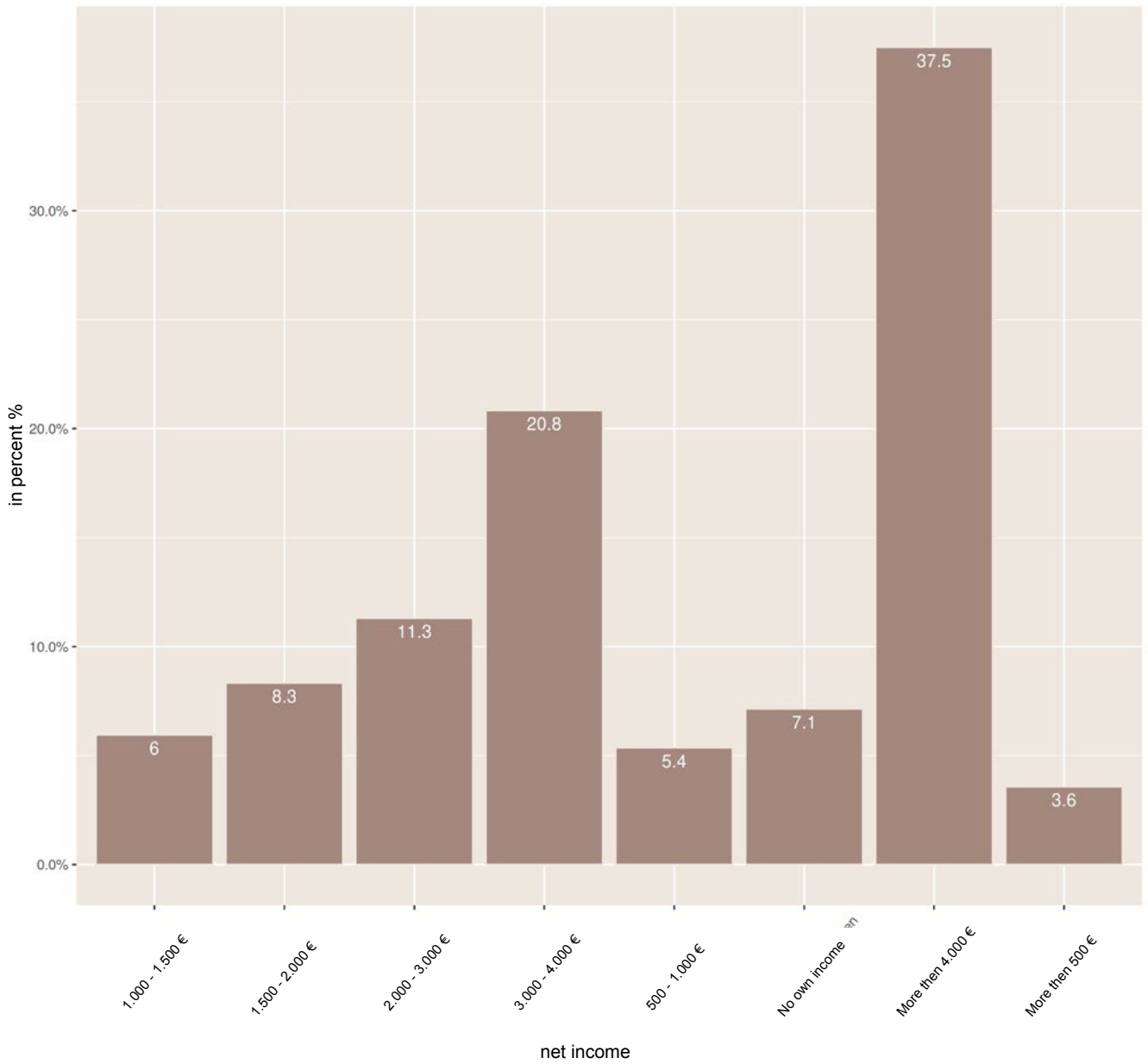
Almost 38 % of Swiss participants said that their net average income was more than 4.000 € per month. The main reason for being vegan diet was animal welfare at 98,3 % - followed by the environment and sustainability aspects with 75,9 % as well as health at 55,2 %.

The majority of Swiss vegans like to cook themselves. With non-vegans it's about 14 % less. 79 % of Swiss vegans get their information on nutritional trends and product innovations through social media. For the other nutritional groups, the figure is only 61.3 %, but they also inform themselves significantly more frequently through magazines and newspapers. Remarkably, 79,3 % of vegans do their shopping at health food stores. However, the majority of non-vegans in Switzerland do their shopping at health food stores. The discount retailer is

comparatively unpopular - especially among vegans. When purchasing plant-based products, they attach great importance to quality and taste, followed by ingredients and sustainability. In this context, Swiss female vegans consider the brand's reputation to be rather unimportant.

Almost 80 % said they purchase animal product alternatives. Half of those people would like to see more variety in the baked goods department. It also seems as if there are not enough milk and dairy alternatives in Swiss supermarkets. When shopping, all food groups pay particular attention to sustainability and environmental protection. Vegans also put a lot of trust in certifications and labels, whereas non-vegans prefer regionality and seasonality.

What is your net monthly income?
Veganz asked, swiss answered.

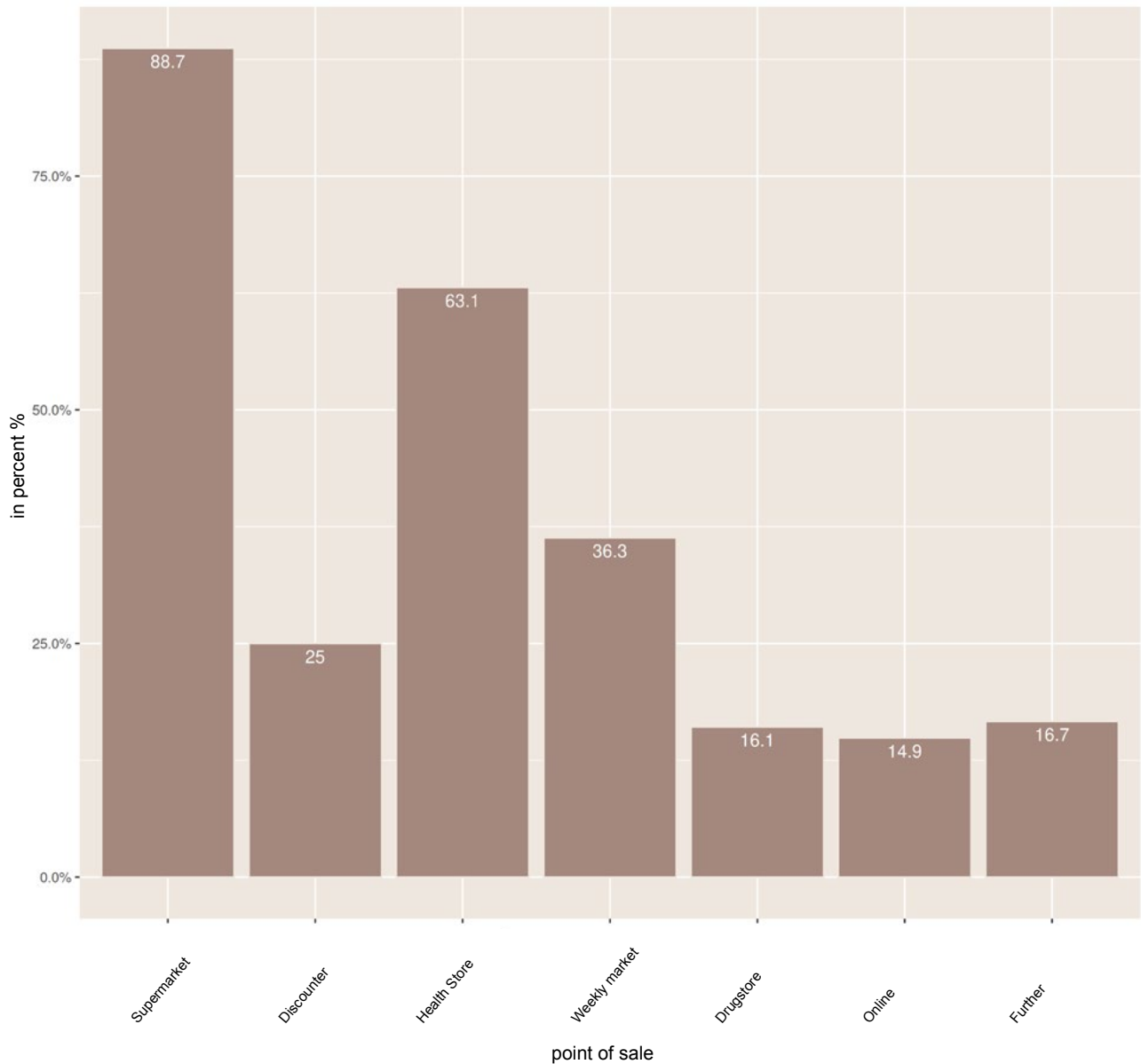


Source: Veganz Nutrition Survey

SWITZERLAND

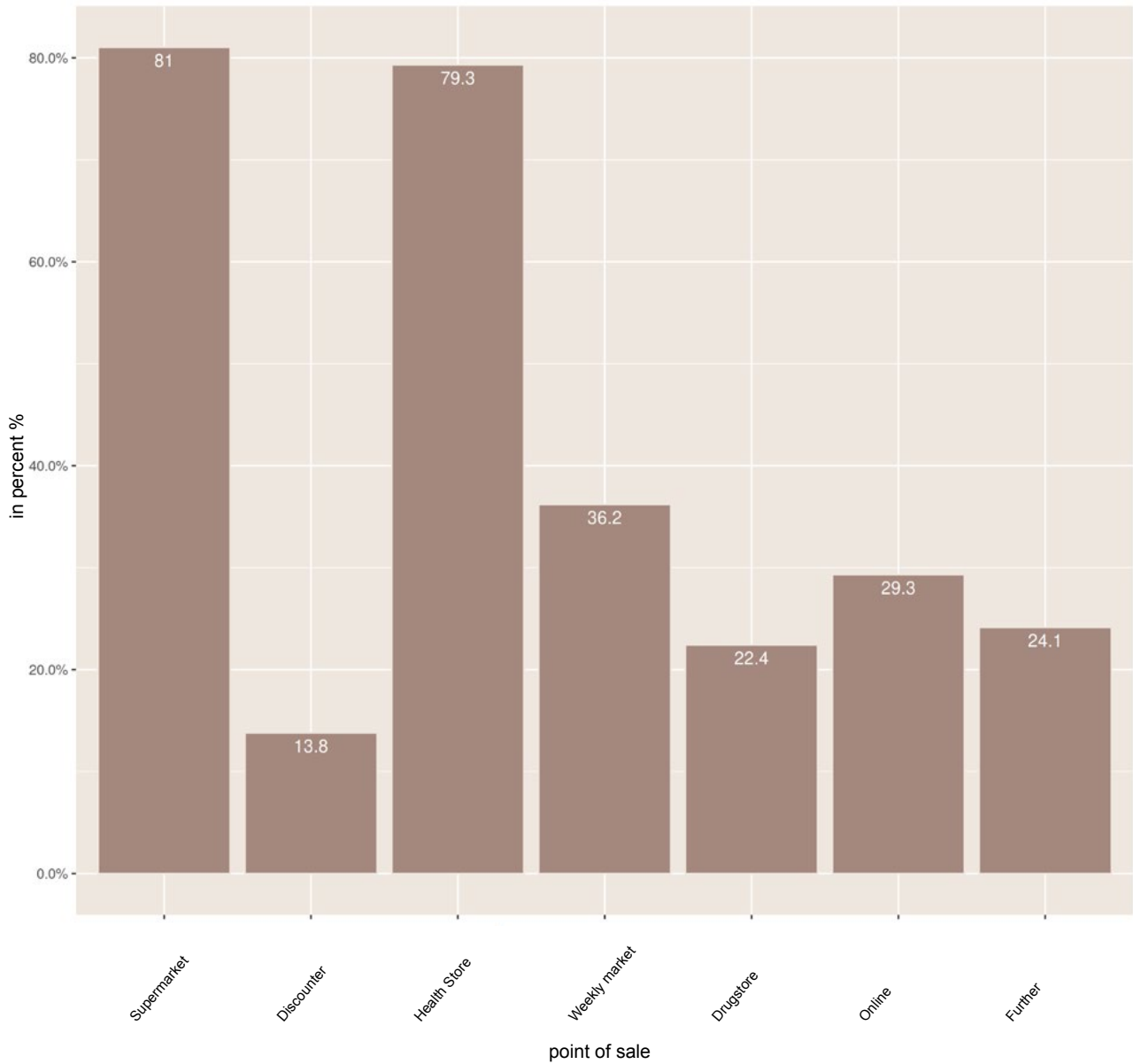
NON-VEGAN

Where do you buy food?
Veganz asked, swiss non-vegans answered.



Source: Veganz Nutrition Survey

Where do you buy food?
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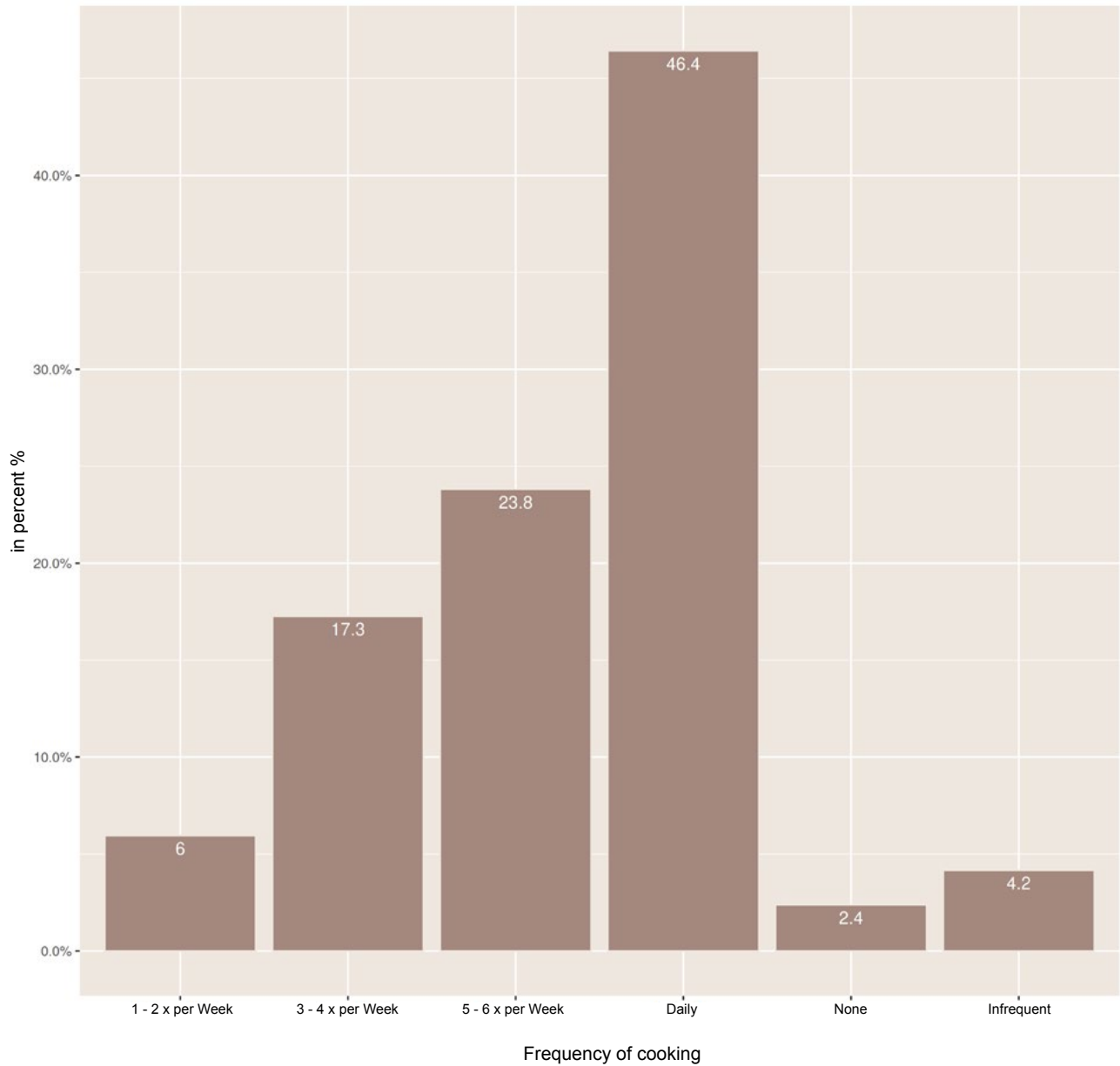


Source: Veganz Nutrition Survey

SWITZERLAND

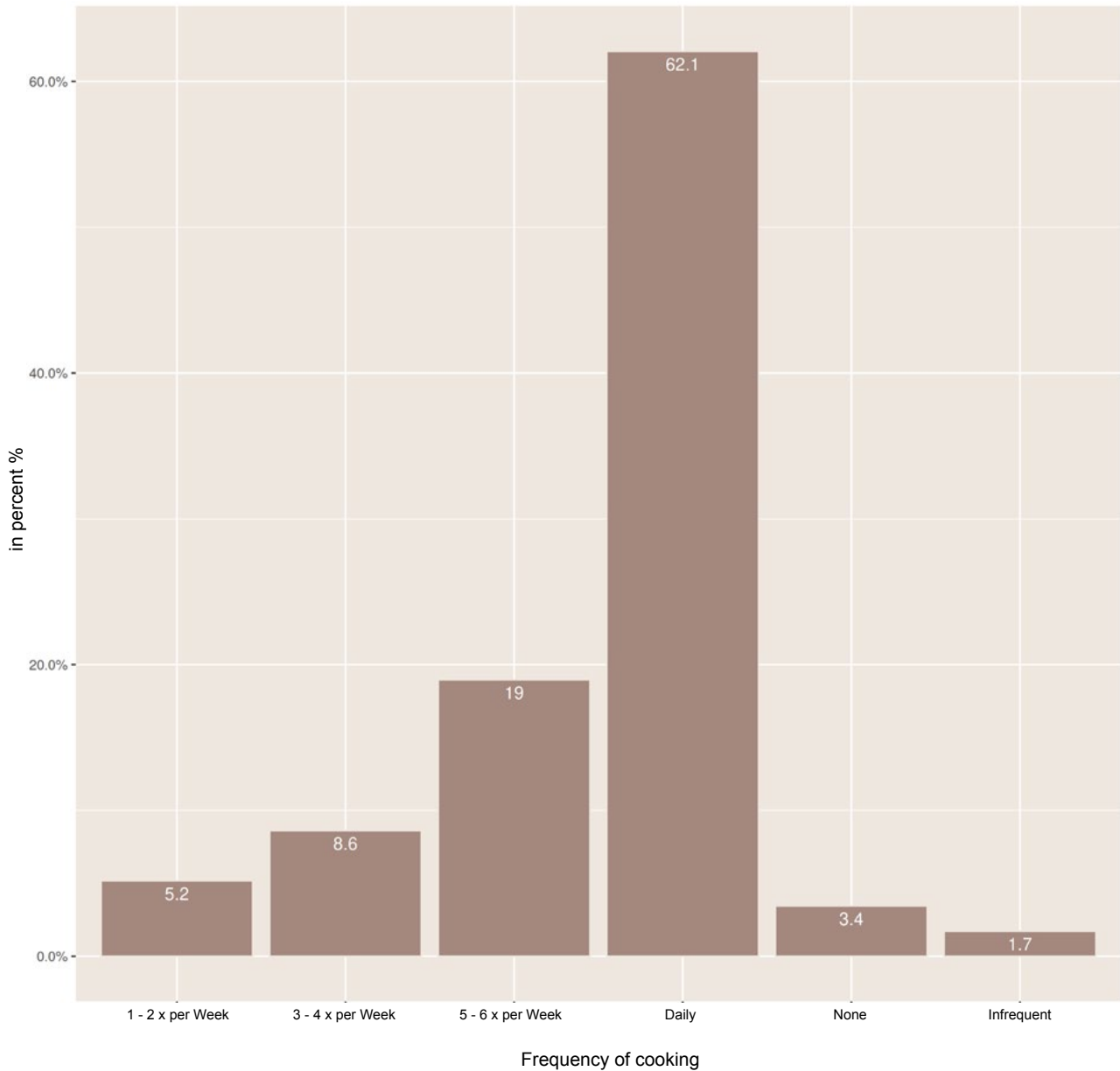
NON-VEGAN

How often do you cook?
Veganz asked,swiss non-vegans answered.



Source: Veganz Nutrition Survey

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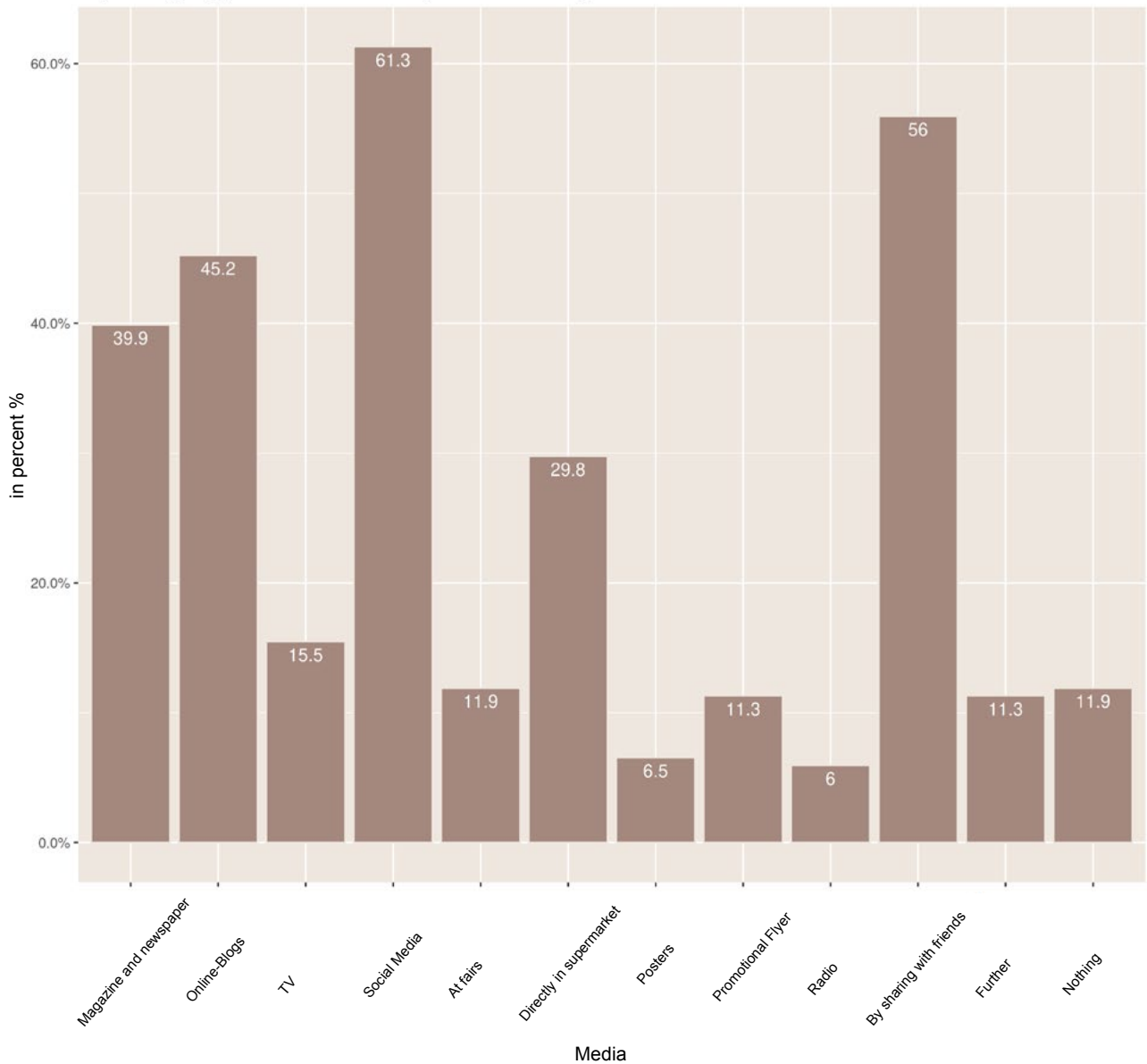


Source: Veganz Nutrition Survey

SWITZERLAND

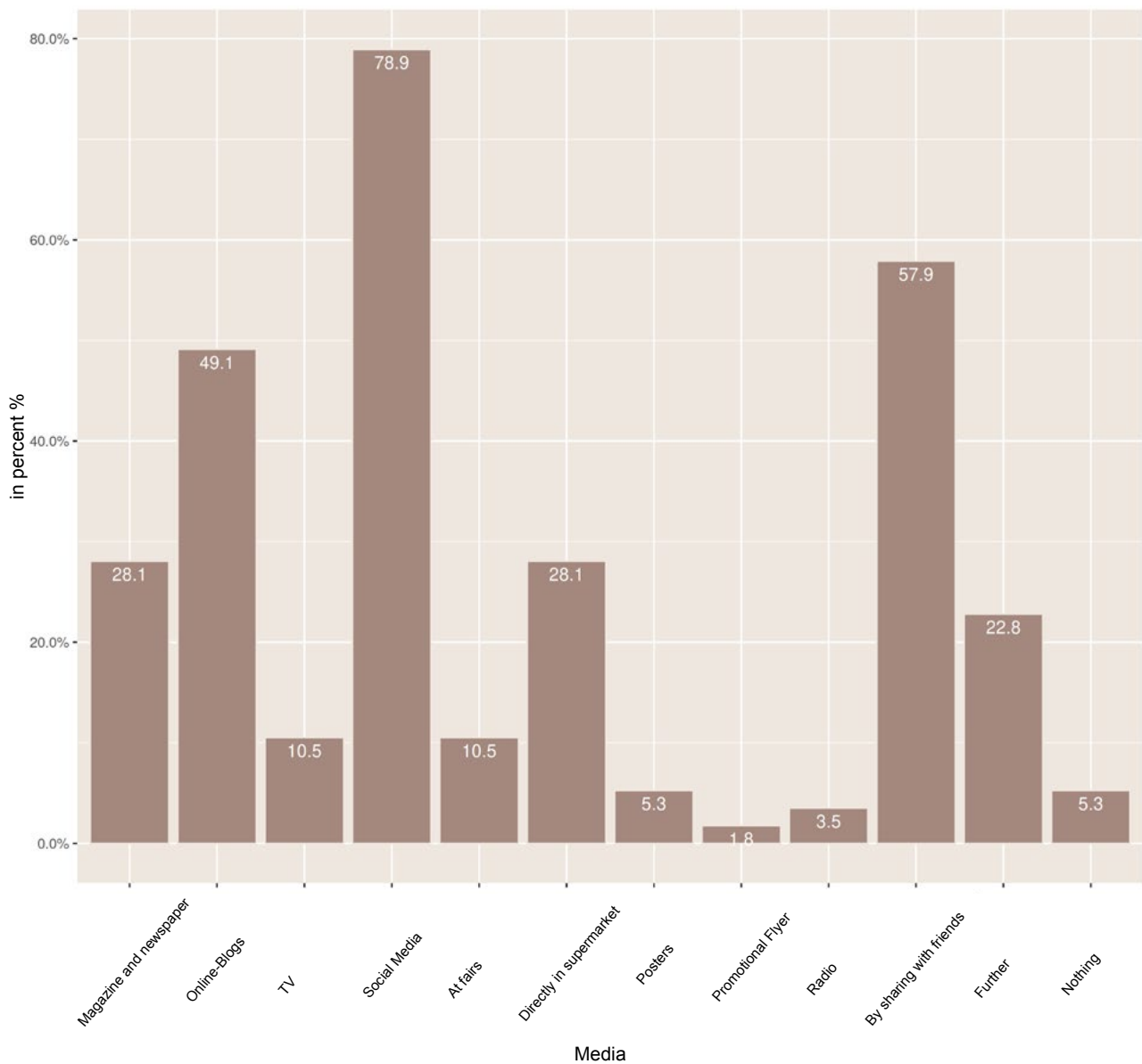
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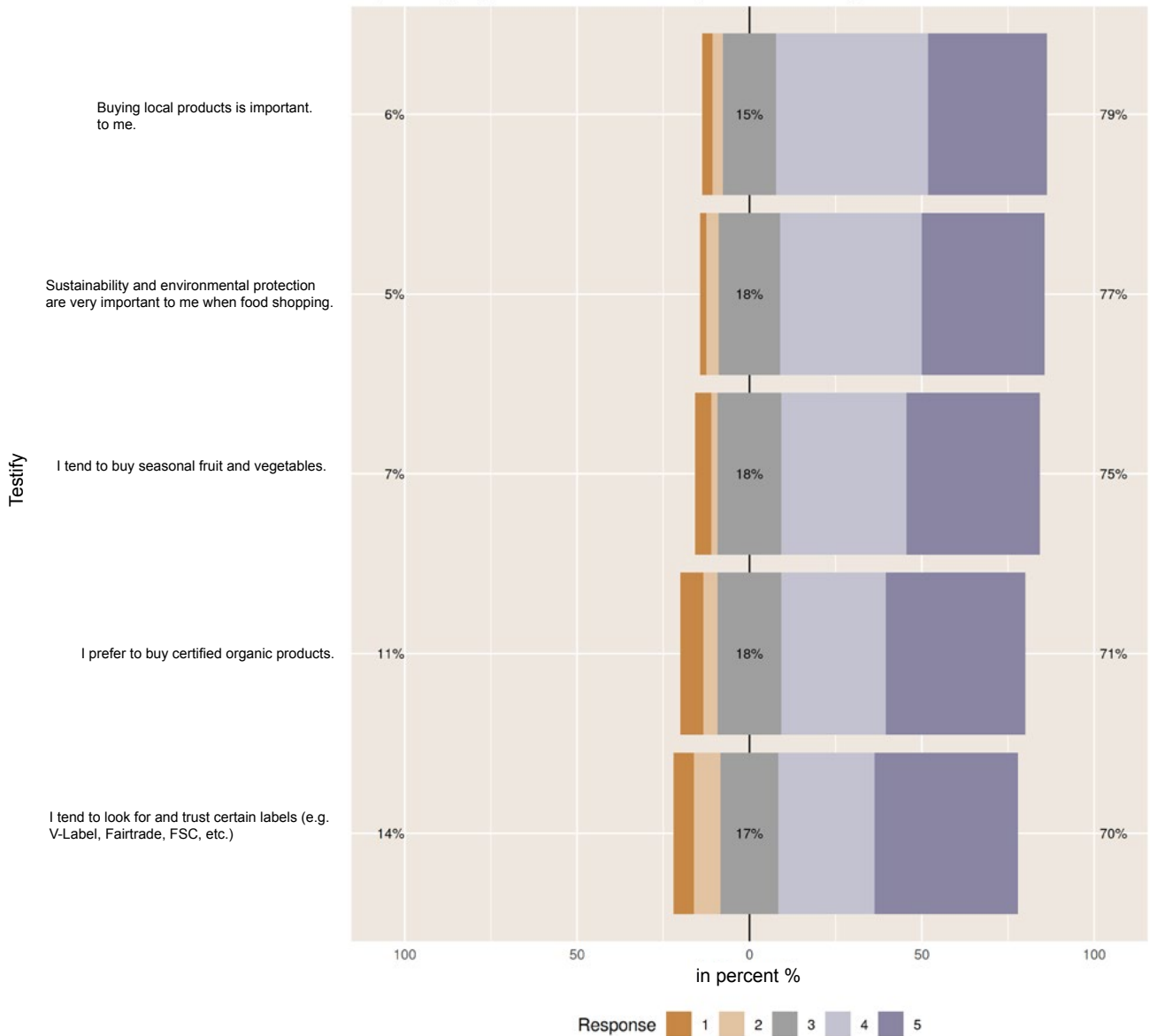


Source: Veganz Nutrition Survey

SWITZERLAND

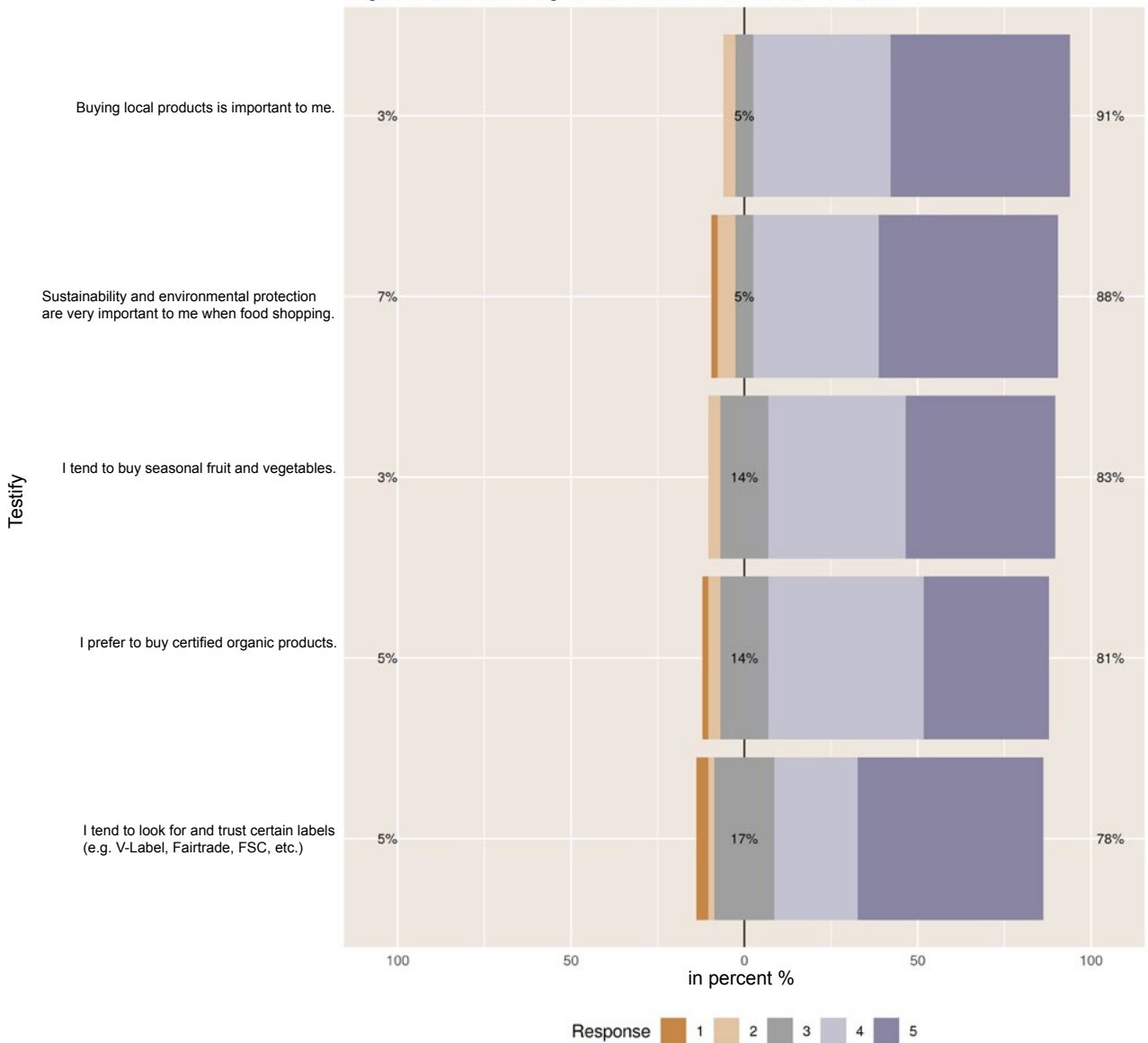
NON-VEGAN

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 Veganz asked, swiss non-vegans answered.



Source: Veganz Nutrition Survey

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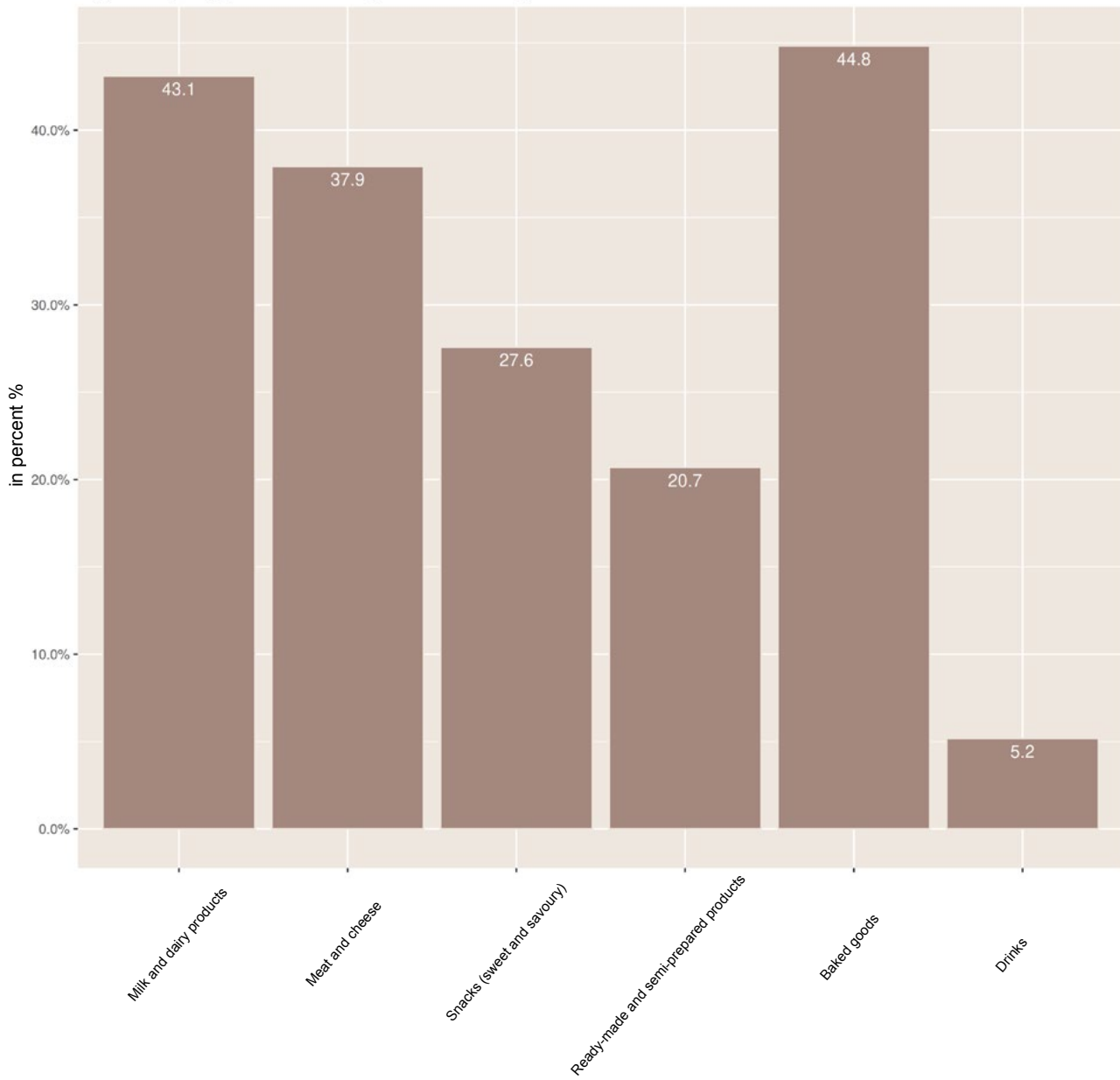


Source: Veganz Nutrition Survey

SWITZERLAND

VEGAN

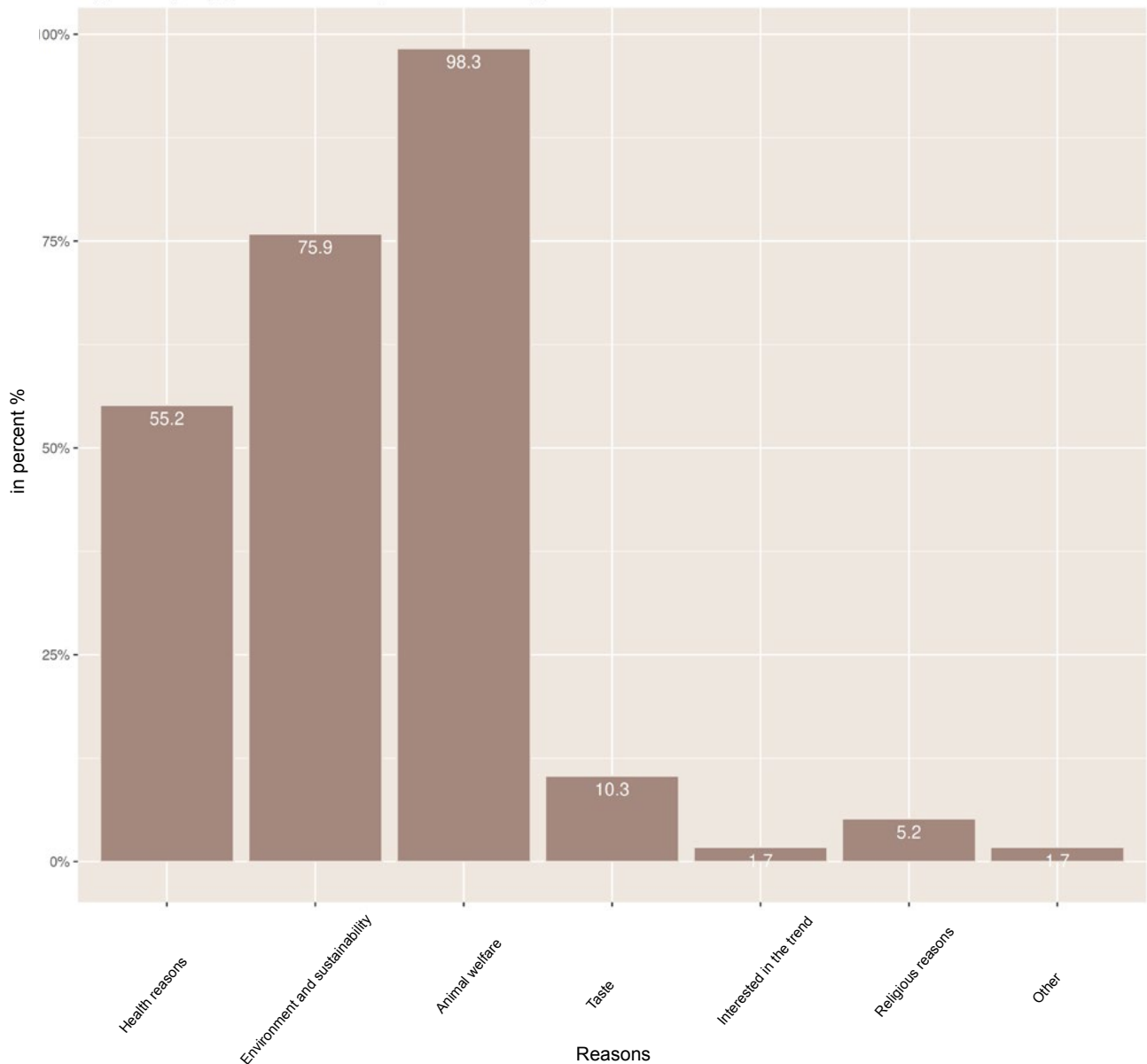
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Media

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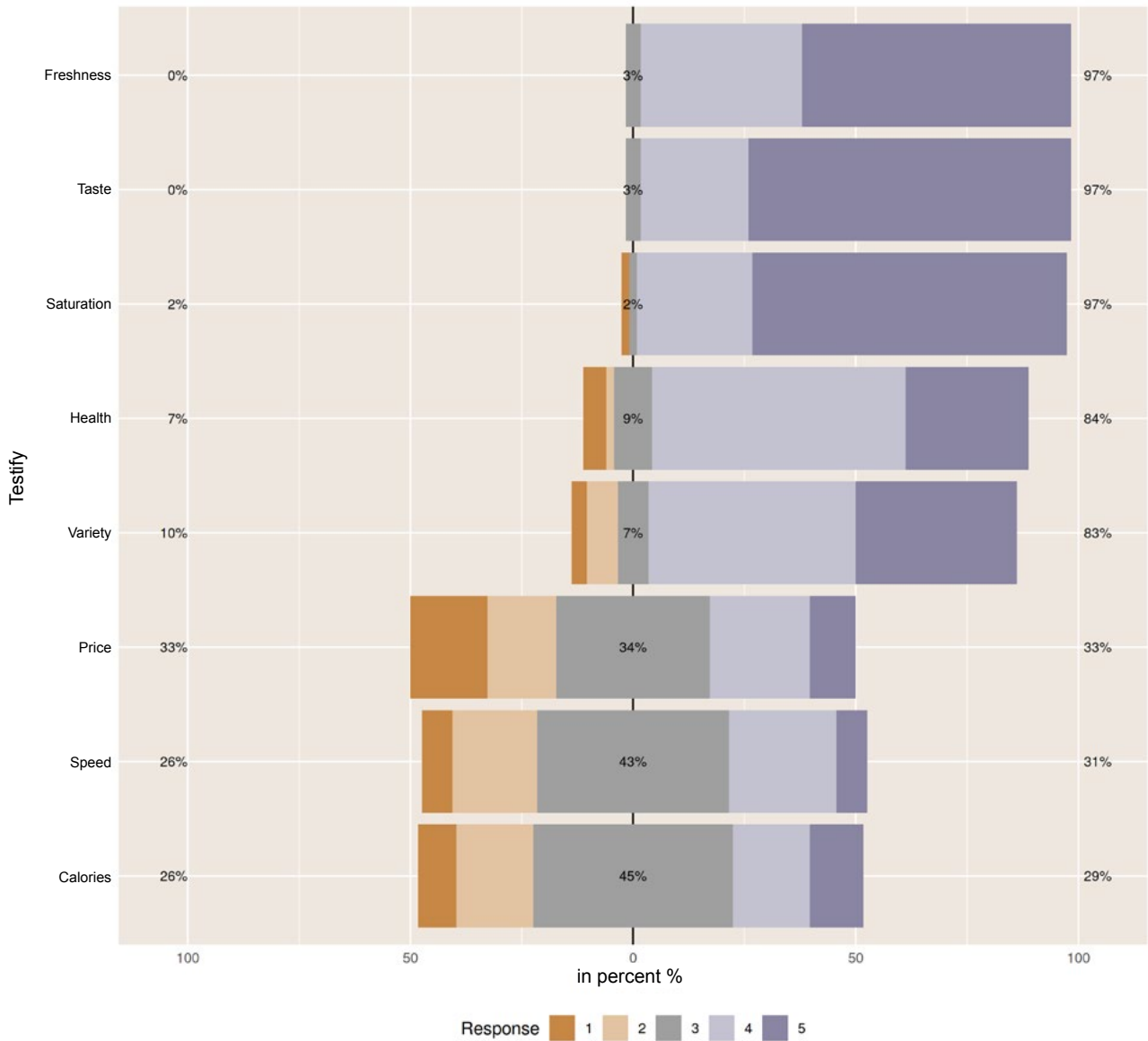


Source: Veganz Nutrition Survey

SWITZERLAND

VEGAN

How important are the following factors to you when it comes to food?
 Scale of 1 "Very important" to 6 "Completely unimportant"
 Veganz asked, swiss vegans answered.



Source: Veganz Nutrition Survey

CZECH REPUBLIC

In the Czech Republic, 43,5 % of the majority of people asked said they have a monthly net income of 500 - 1.000 €. A further 22,9 % have between 1.000 - 1.500 € per month. Motivation for a vegan lifestyle are animal protection, environment and sustainability - in equal measure.

A total of 36,7 % Czech vegans depend on their own cooking skills and indeed cook daily. Another 40 % stand at their own stoves 5 times a week. Even non-vegans in the Czech Republic like to cook themselves. Nevertheless, more than 5 % of the people here cook less than once a week.

80 % of vegans get their nutrition trends and product innovation information from social media and a further 64 % read online blogs. 52 % like an exchange of ideas with friends. A comparable pattern can also be found among the other food groups. The Czech vegan goes shopping at health stores as much as they do the supermarket. 60 % of people

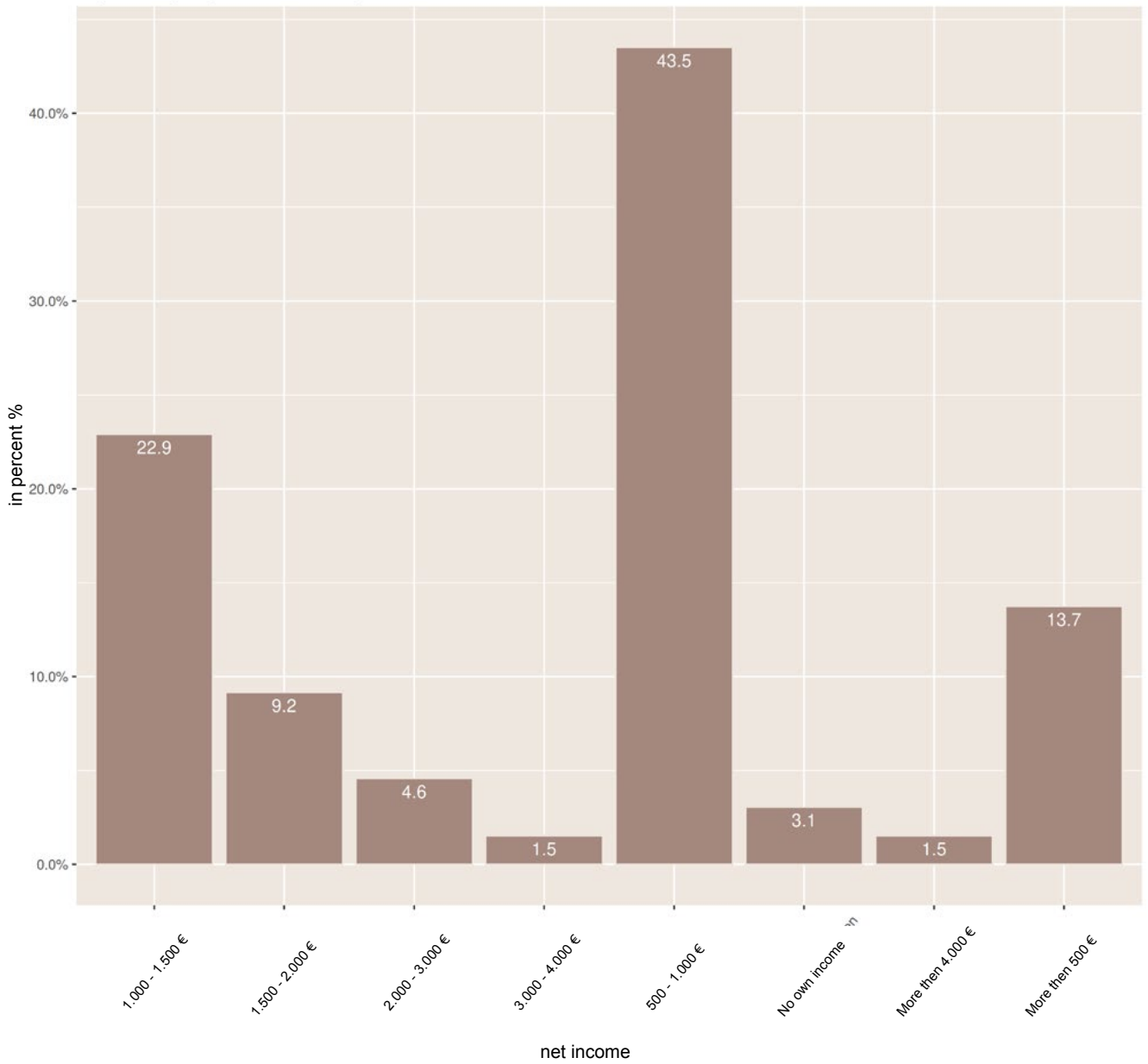
like going to the weekly market, followed closely behind by online shopping. Less prevalent among non-vegans is this: 95.4 % prefer the supermarket and in second place is the organic shop with 68 %.

Especially when buying vegan products, people in the Czech Republic place great importance on quality and taste. Innovation, organic certifications and the product's popularity are unimportant to them.

More than half of Czech vegans would like more variety in the areas of alternative milk and dairy products. There is also a lack of options for cured meats, cheese substitutes and baked goods.

In addition to sustainability, 70 % of Czech vegans put great value on quality seals and labels. Yet, only 47 % say they prefer certified organic products. With the non-vegans it's even less with just 34 %. Seasonality of fruit and vegetables seems to be of more importance for the non-vegan than the vegan.

What is your net monthly income?
Veganz asked, czech answered.

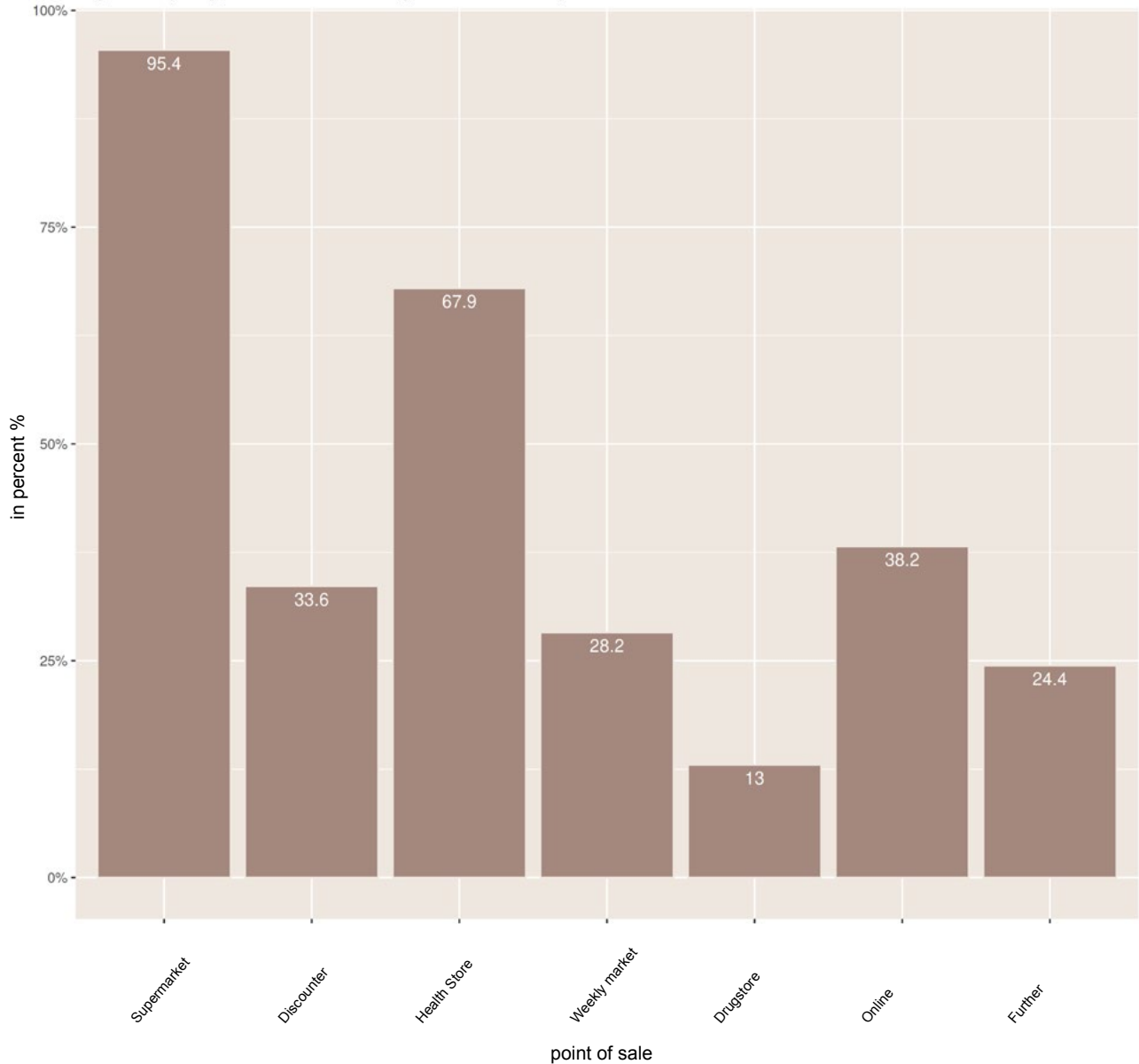


Source: Veganz Nutrition Survey

CZECH REPUBLIC

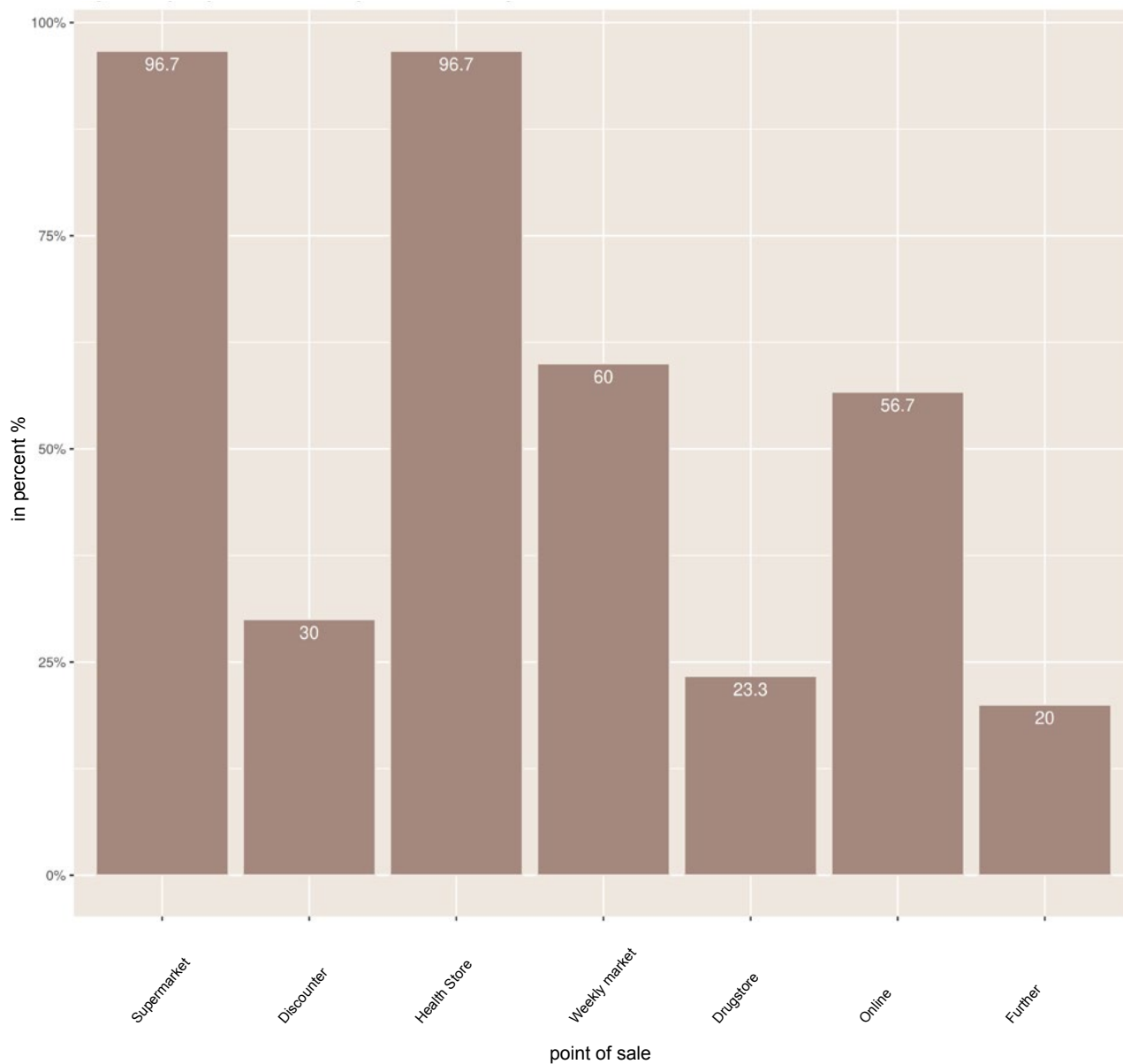
NON-VEGAN

Where do you buy food?
Veganz asked, czech non-vegans answered.



Source: Veganz Nutrition Survey

Where do you buy food?
Veganz asked, czech vegans answered.



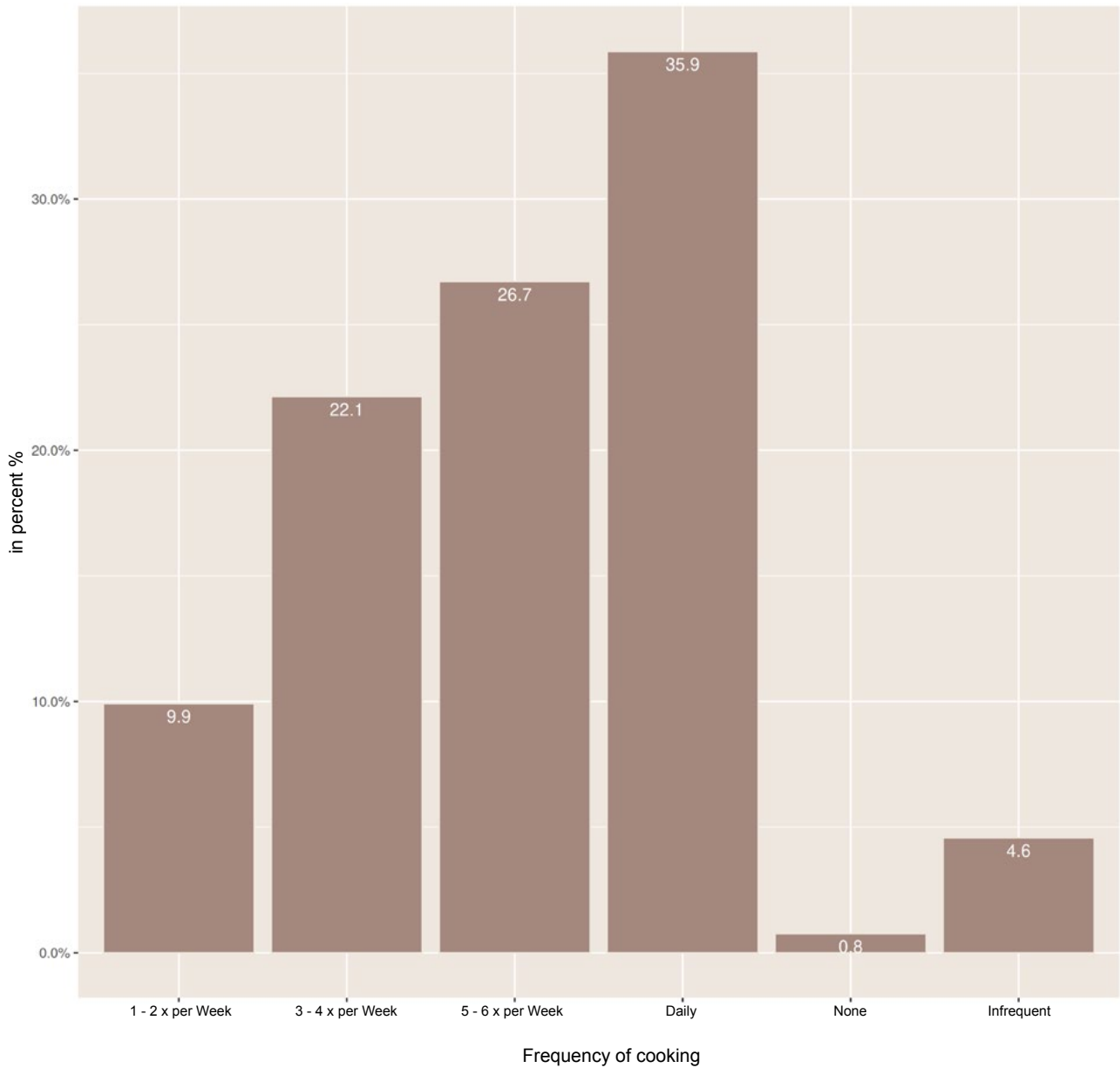
Source: Veganz Nutrition Survey

CZECH REPUBLIC

NON-VEGAN

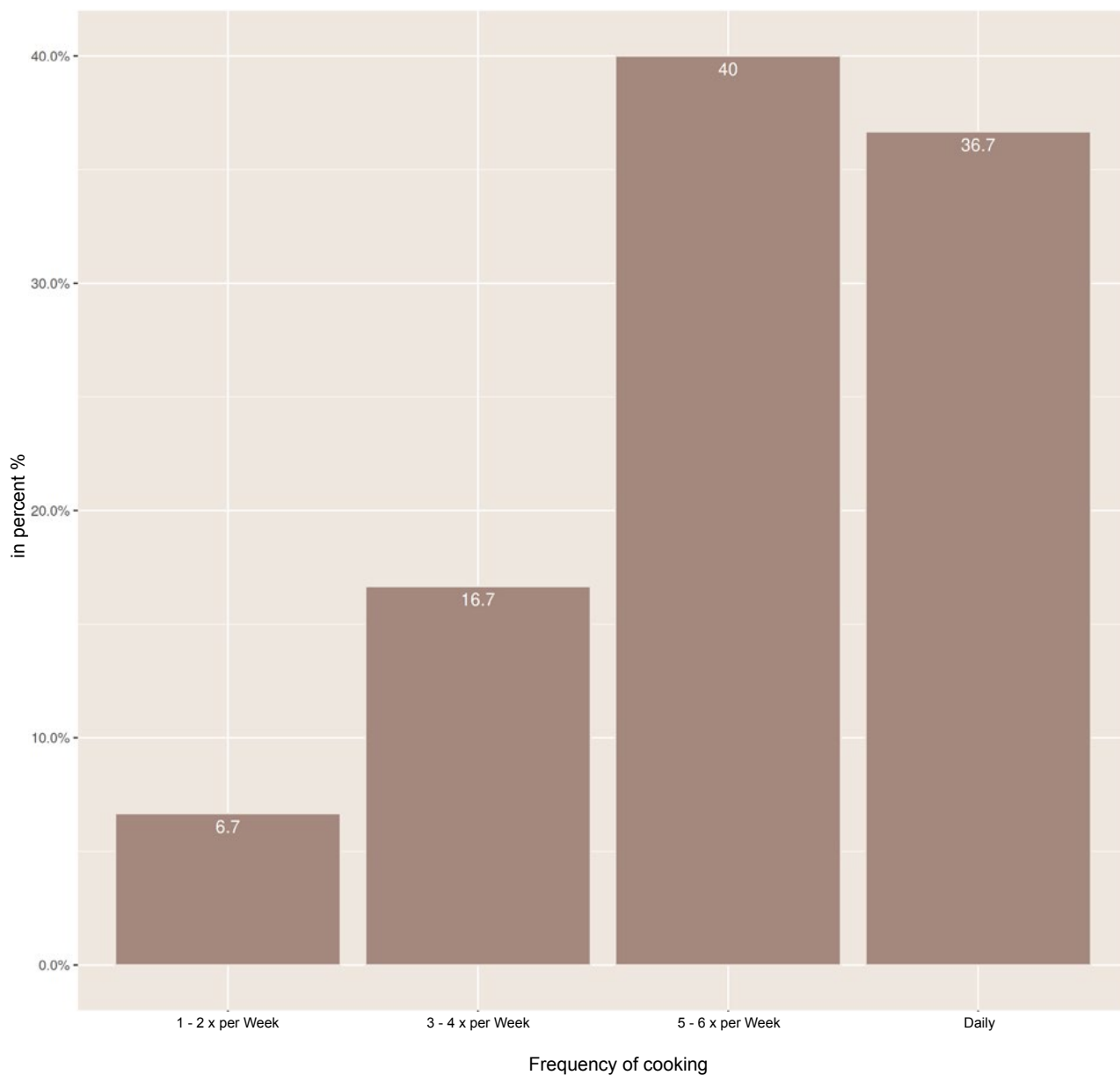
How often do you cook?

Veganz asked, czech non-vegans answered.



Source: Veganz Nutrition Survey

How often do you cook?
Veganz asked, czech vegans answered.

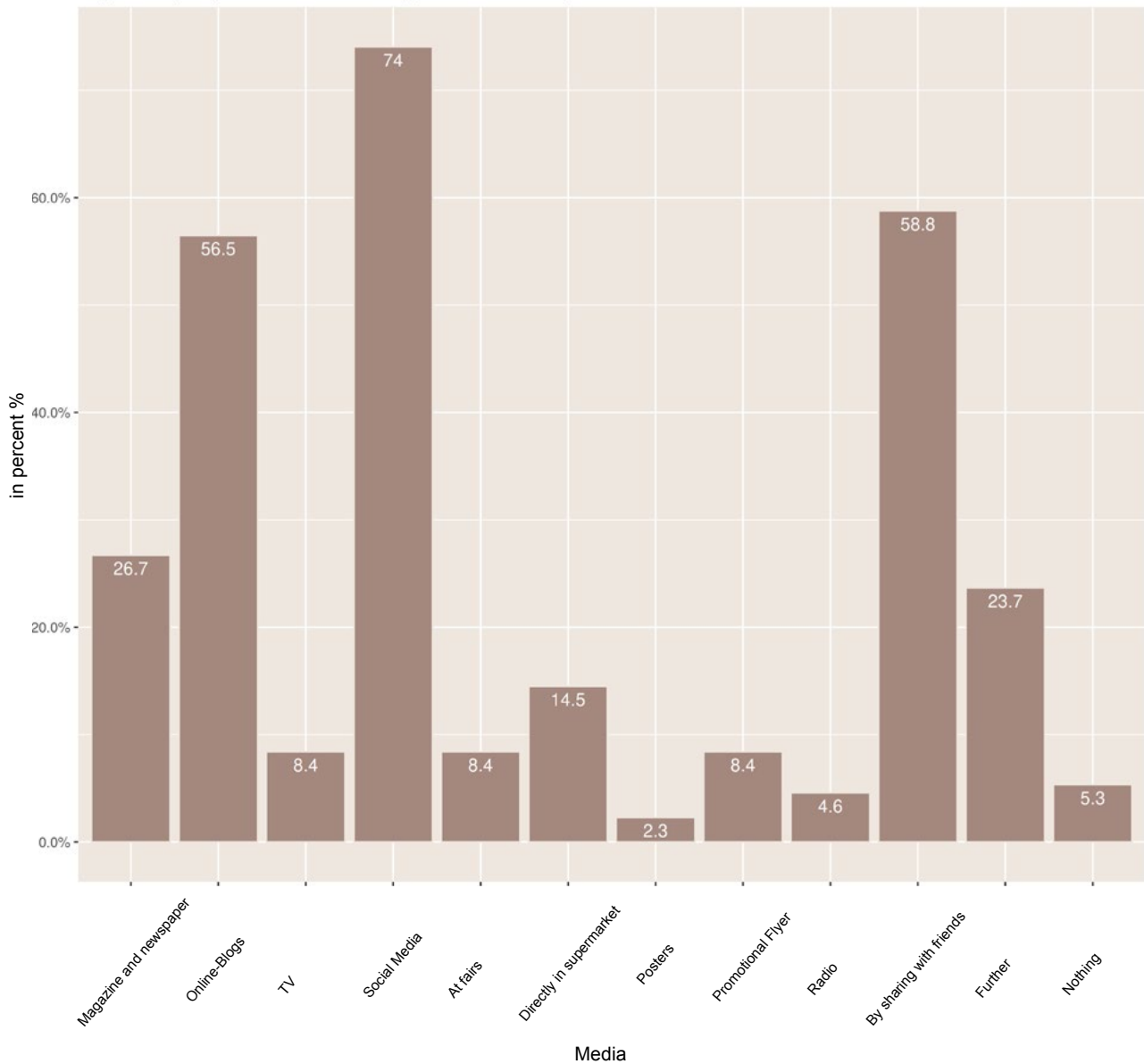


Source: Veganz Nutrition Survey

CZECH REPUBLIC

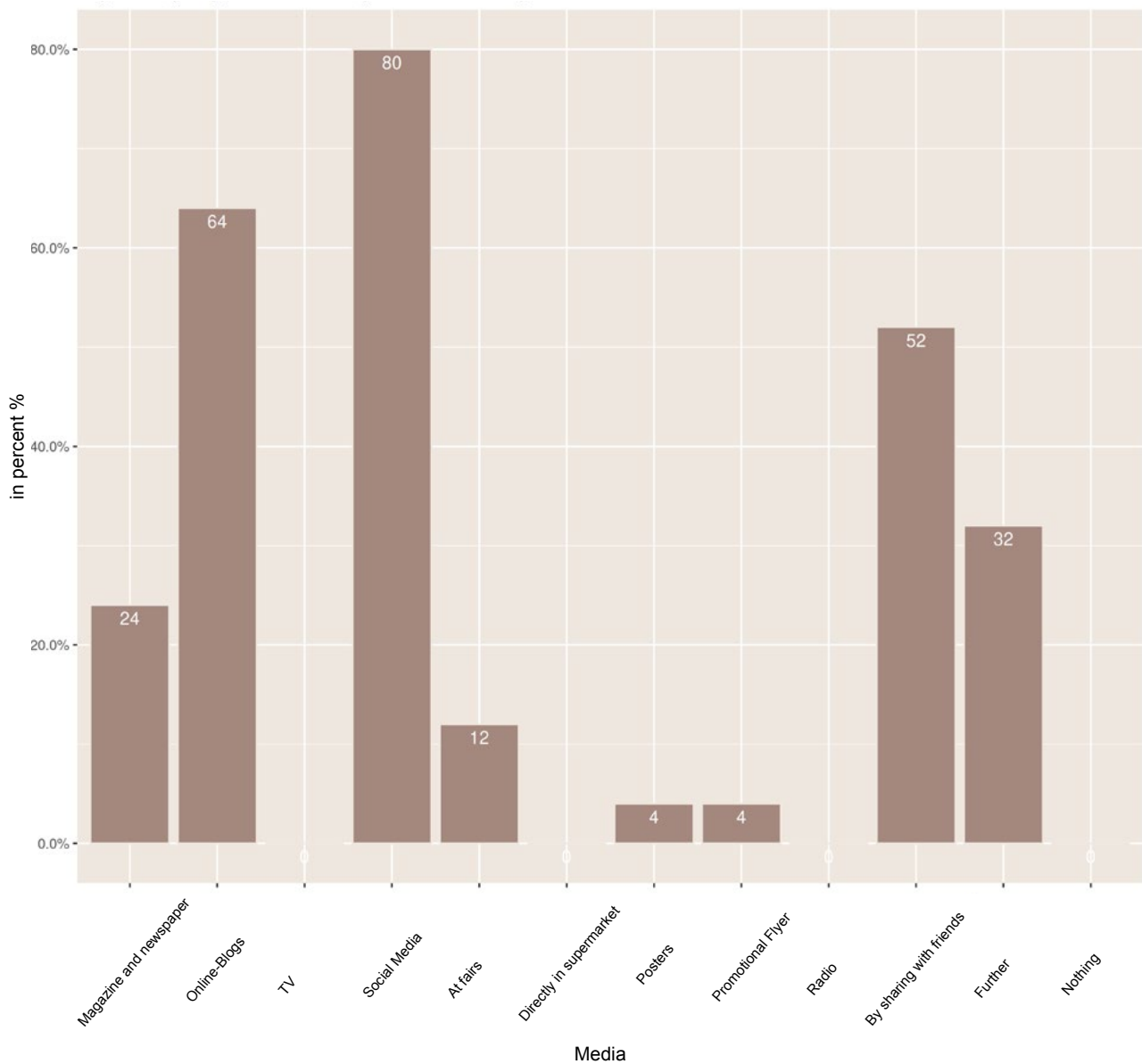
NON-VEGAN

Where do you find information about dietary trends and product innovations?
Veganz asked, czech non-vegans answered.



Source: Veganz Nutrition Survey

Where do you find information about dietary trends and product innovations?
 Veganz asked, czech vegans answered.

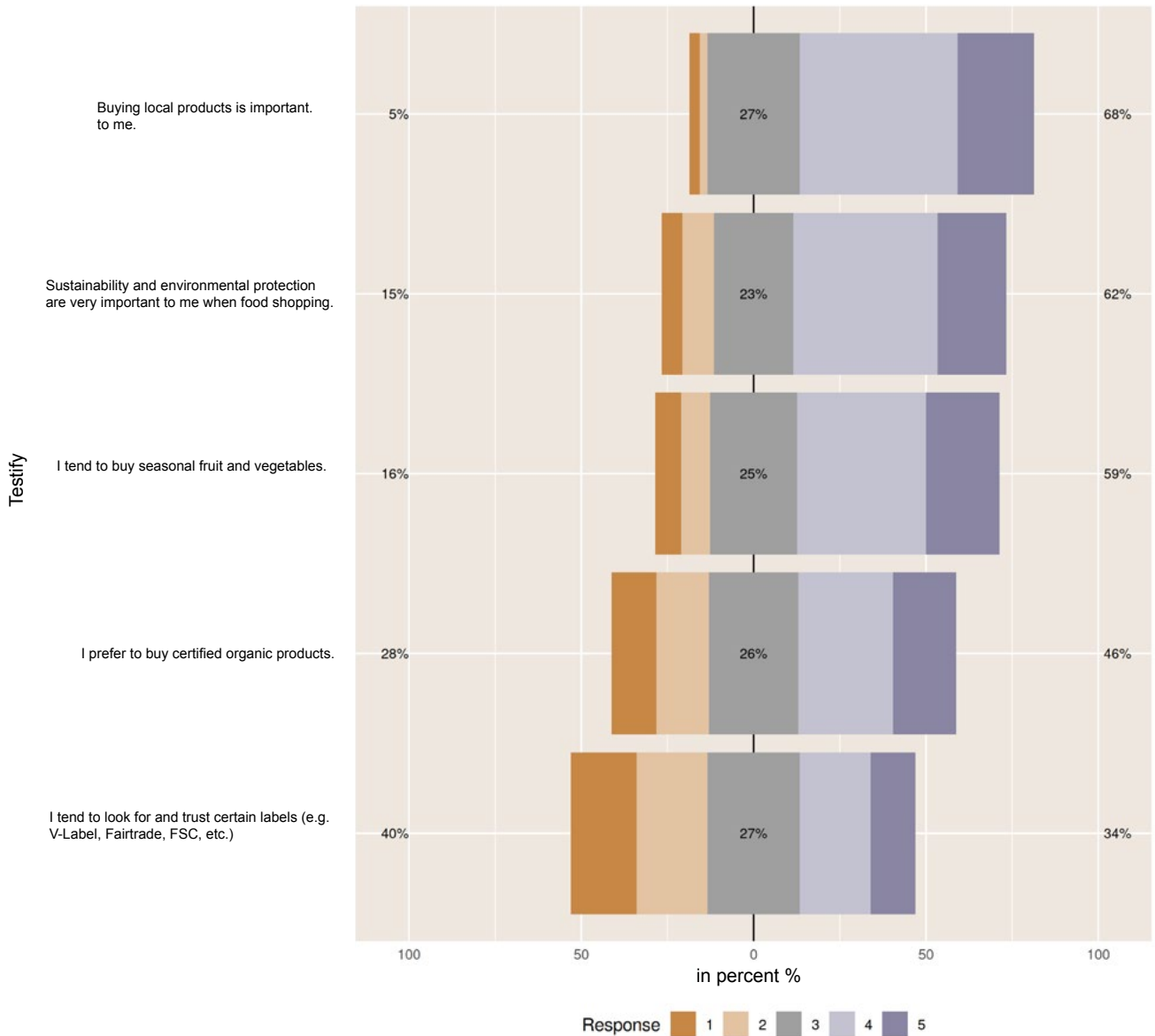


Source: Veganz Nutrition Survey

CZECH REPUBLIC

NON-VEGAN

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 Veganz asked, czech non-vegans answered.

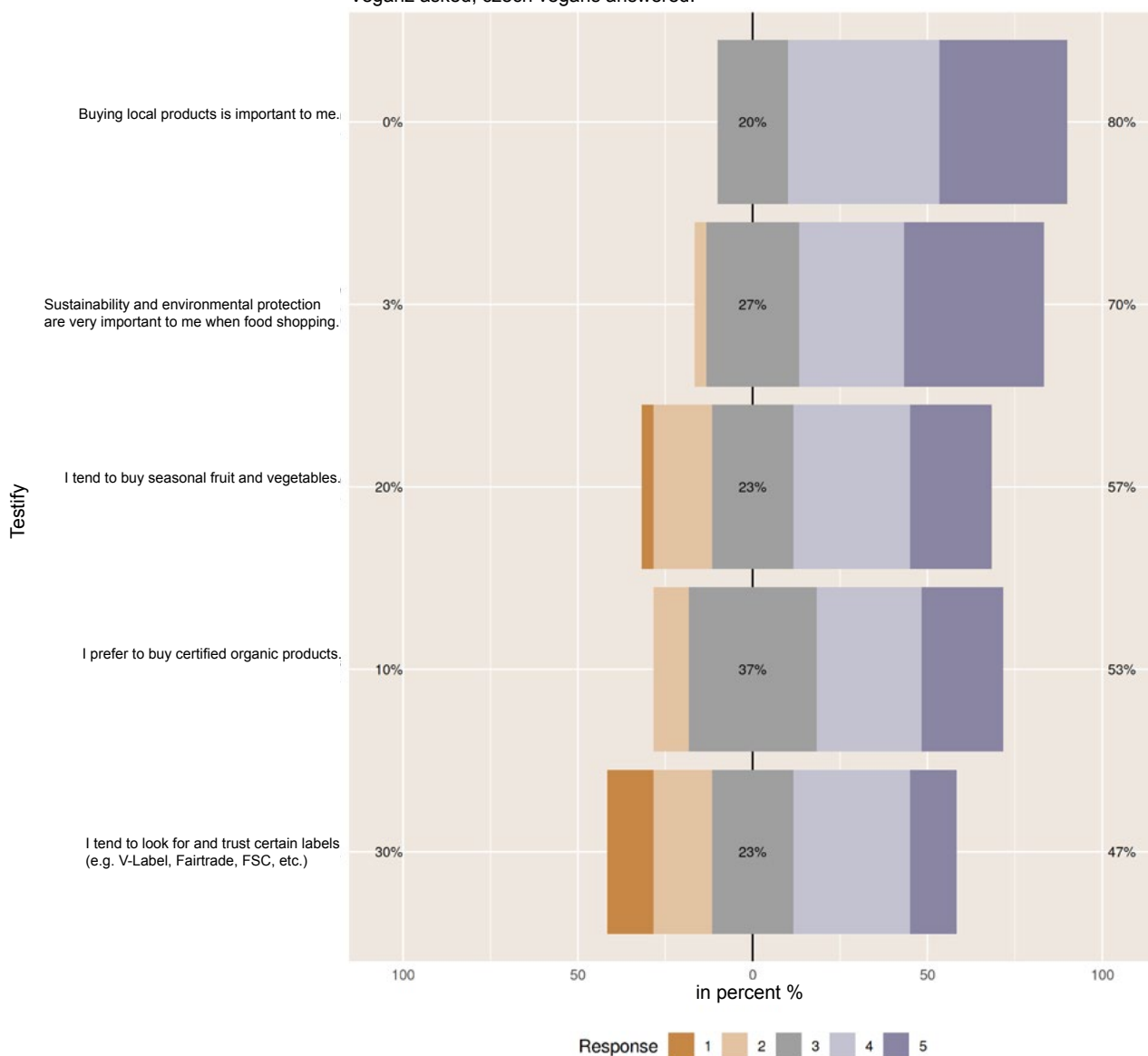


Source: Veganz Nutrition Survey

To what extent do the following statements describe you?

Scale from 1 "Totally agree" to 6 "Totally disagree"

Veganz asked, czech vegans answered.

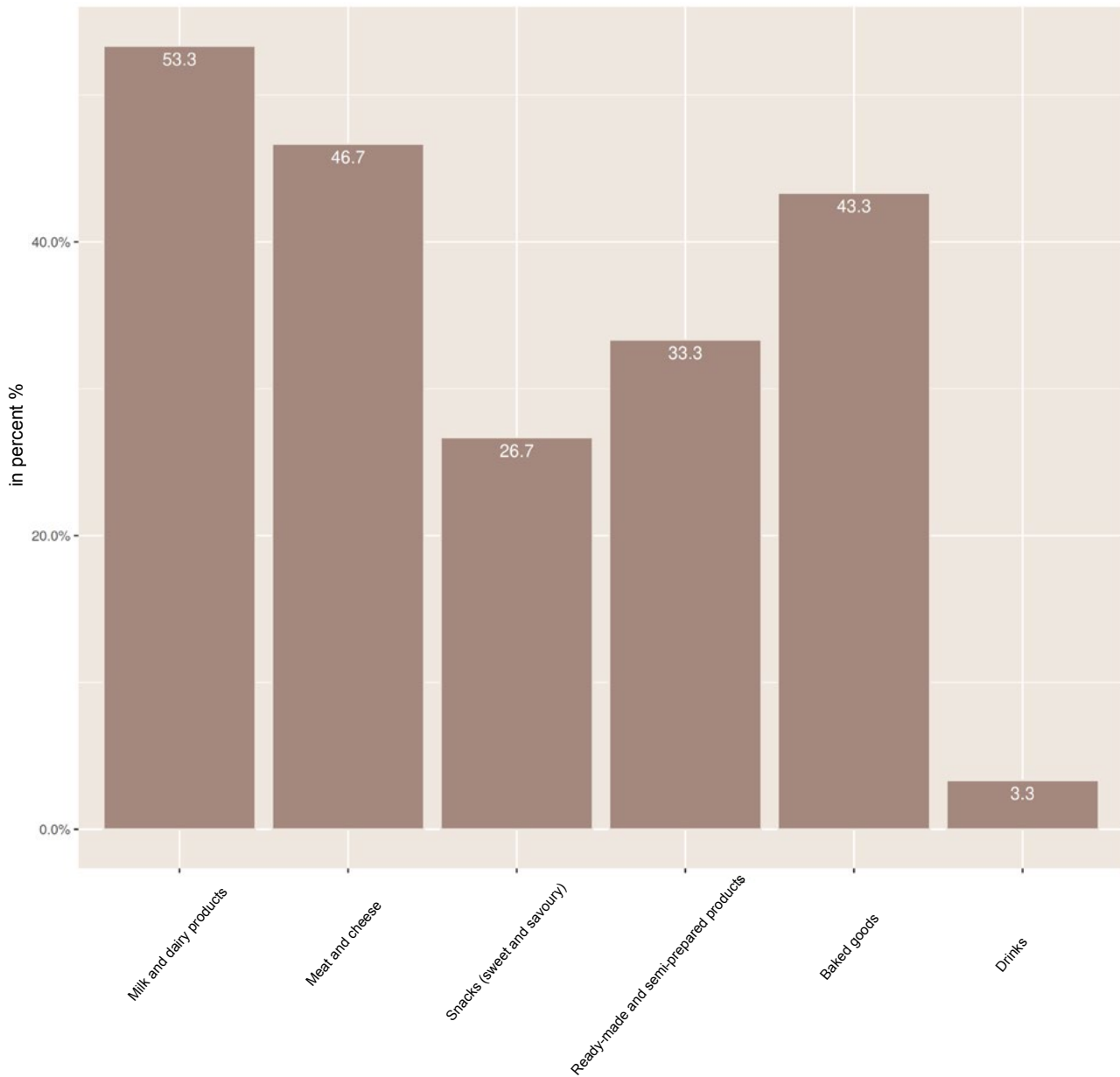


Source: Veganz Nutrition Survey

CZECH REPUBLIC

VEGAN

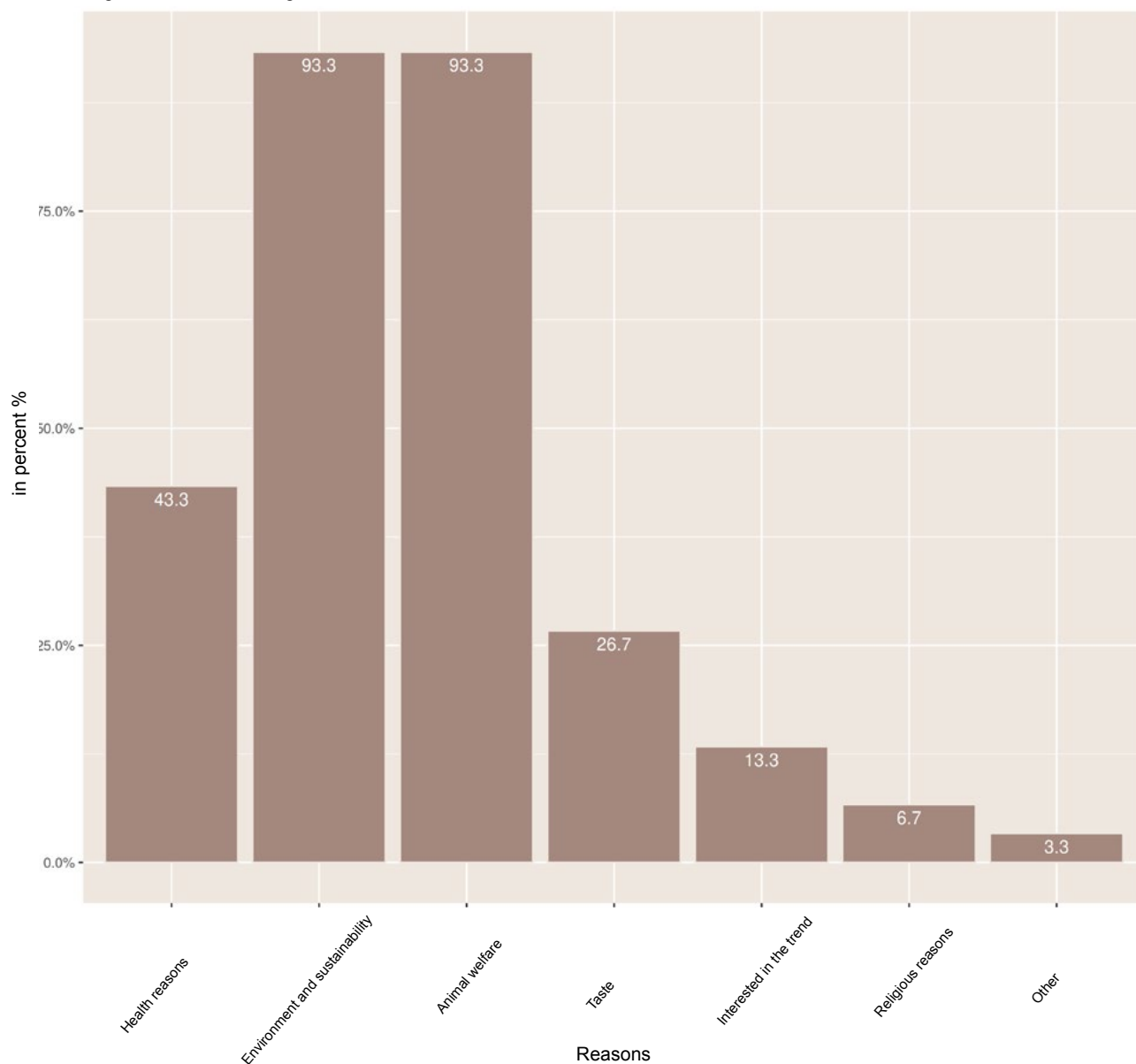
What type of vegan alternatives would you like to see more of?
Veganz asked, czech vegans answered.



Media

Source: Veganz Nutrition Survey

What are your reasons for eating vegan?
Veganz asked, czech vegans answered.

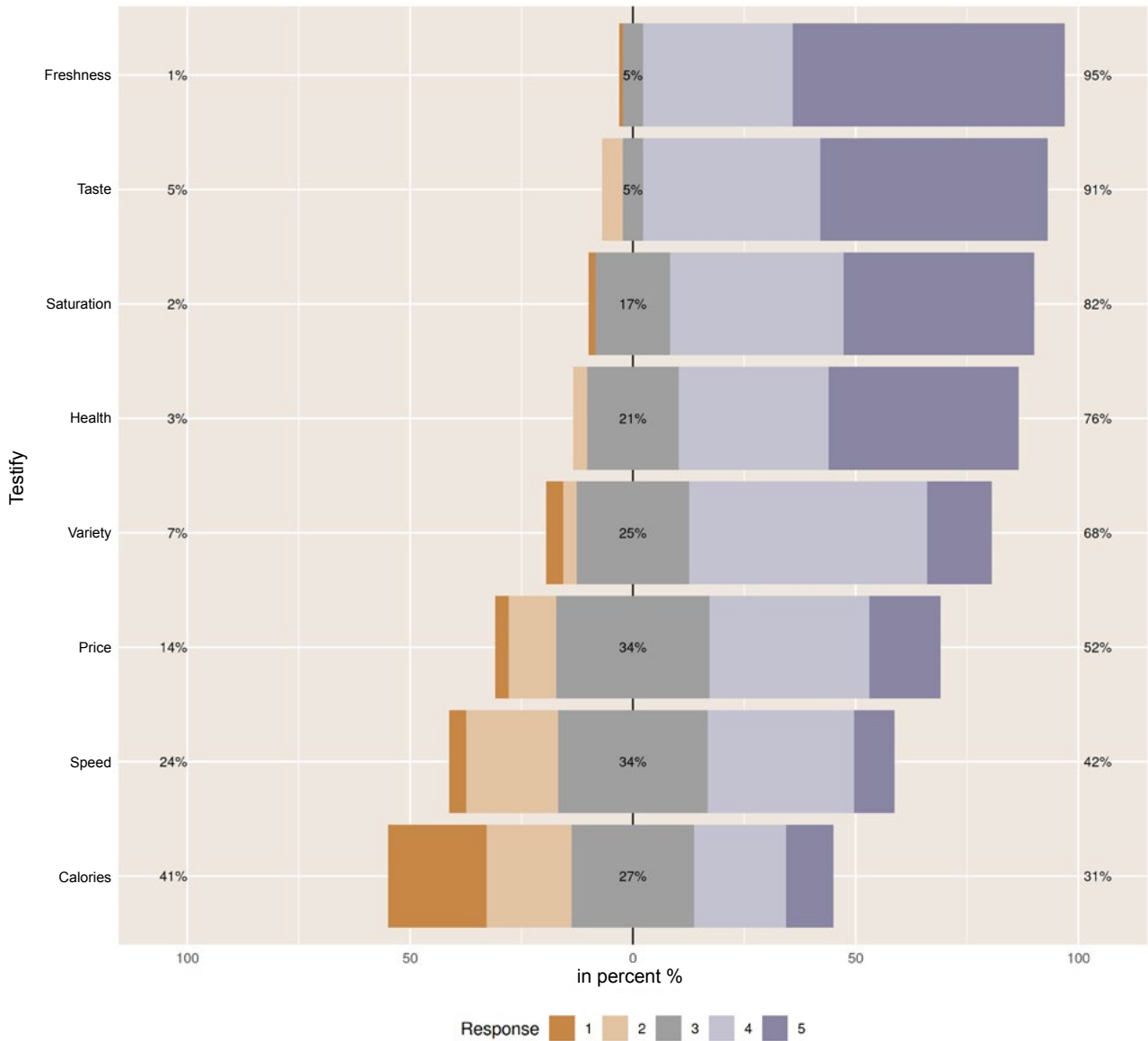


Source: Veganz Nutrition Survey

CZECH REPUBLIC

VEGAN

How important are the following factors to you when it comes to food?
 Scale of 1 "Very important" to 6 "Completely unimportant"
 Veganz asked, czech vegans answered.



Source: Veganz Nutrition Survey

DENMARK

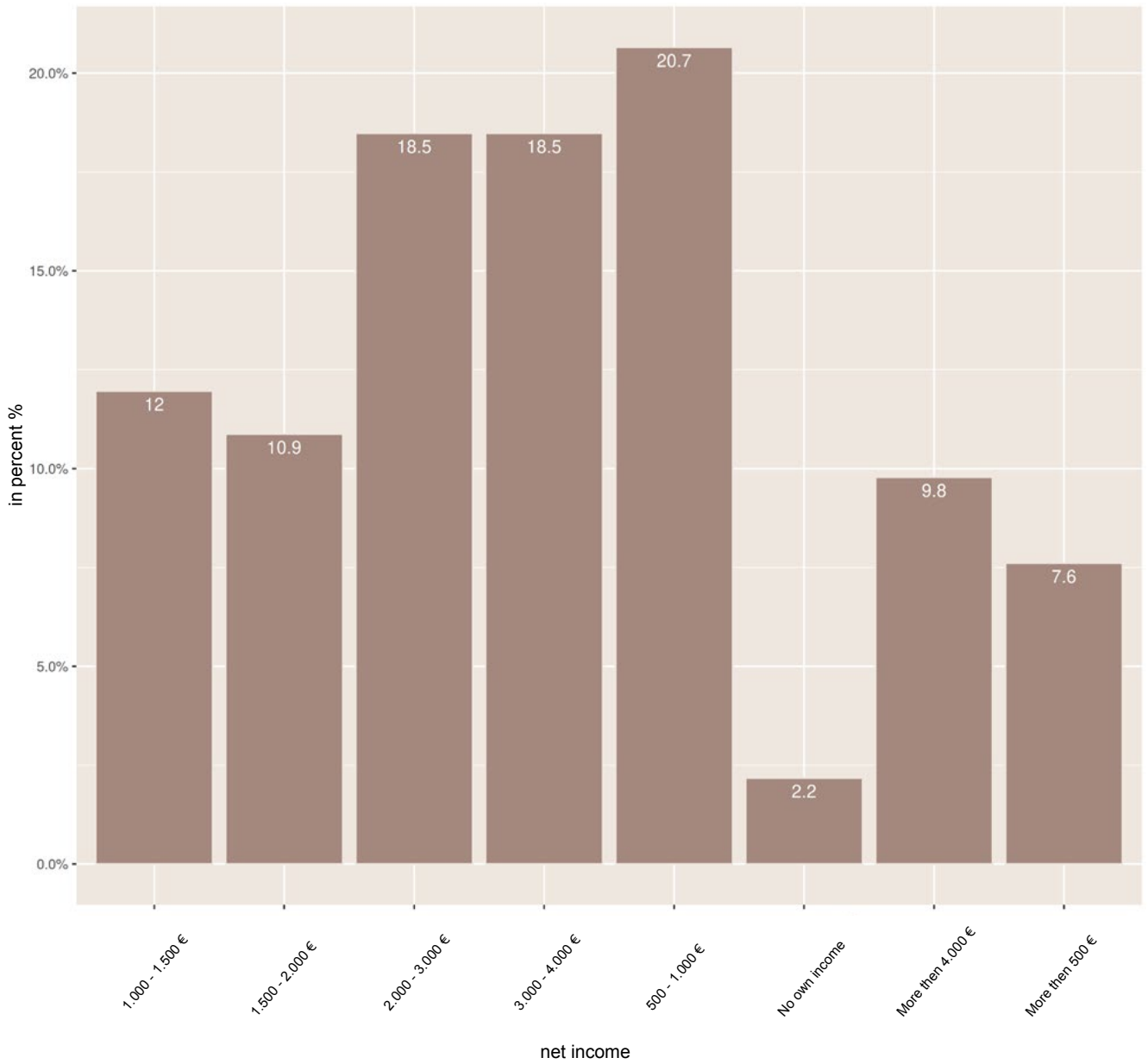
In Denmark, 20,7 % of those surveyed said their monthly net income was between 500 - 1.000 €. Another 18,5 % said they had 2.000 - 3000 € or 3.000 - 4.000 € per month. Of the vegans asked, 90,9 % said that their main reason for going vegan was animal welfare and the environment. Another 72,7 % said that health was an aspect dear to their hearts.

Danish vegans prefer their own kitchen and cook at least once a week themselves – and a whole 45,5 % of them do it daily. It's comparatively less with the other nutrition groups, although 38 % cook fresh food daily and another 28,3 %, 5 to 6 times a week. When looking for information on nutrition and product innovations, all nutritional groups rely on social media, talking with friends and online blogs. Danes like shopping in supermarkets the most. 60 % of vegans

go to health food stores and more than half of them do their shopping online or at the discount retailer as well.

For all Danish vegans, the taste of vegan food is the most important followed by quality and product ingredients. Regionality, innovation and brand awareness are given less importance in the purchasing process. In the areas of cured meats and cheese as well baked goods, 60,6 % would like to see more plant-based alternatives. In addition, about half the vegans asked are missing a broader choice of sweets, snacks as well as readymade- and semi-readymade meals. 80 % of the Danish non-vegans trust the supermarket's well-known quality seals and labels - 76 % generally prefer the health food store. They also place great emphasis on sustainability and environmental protection when purchasing food.

What is your net monthly income?
Veganz asked, danish answered.

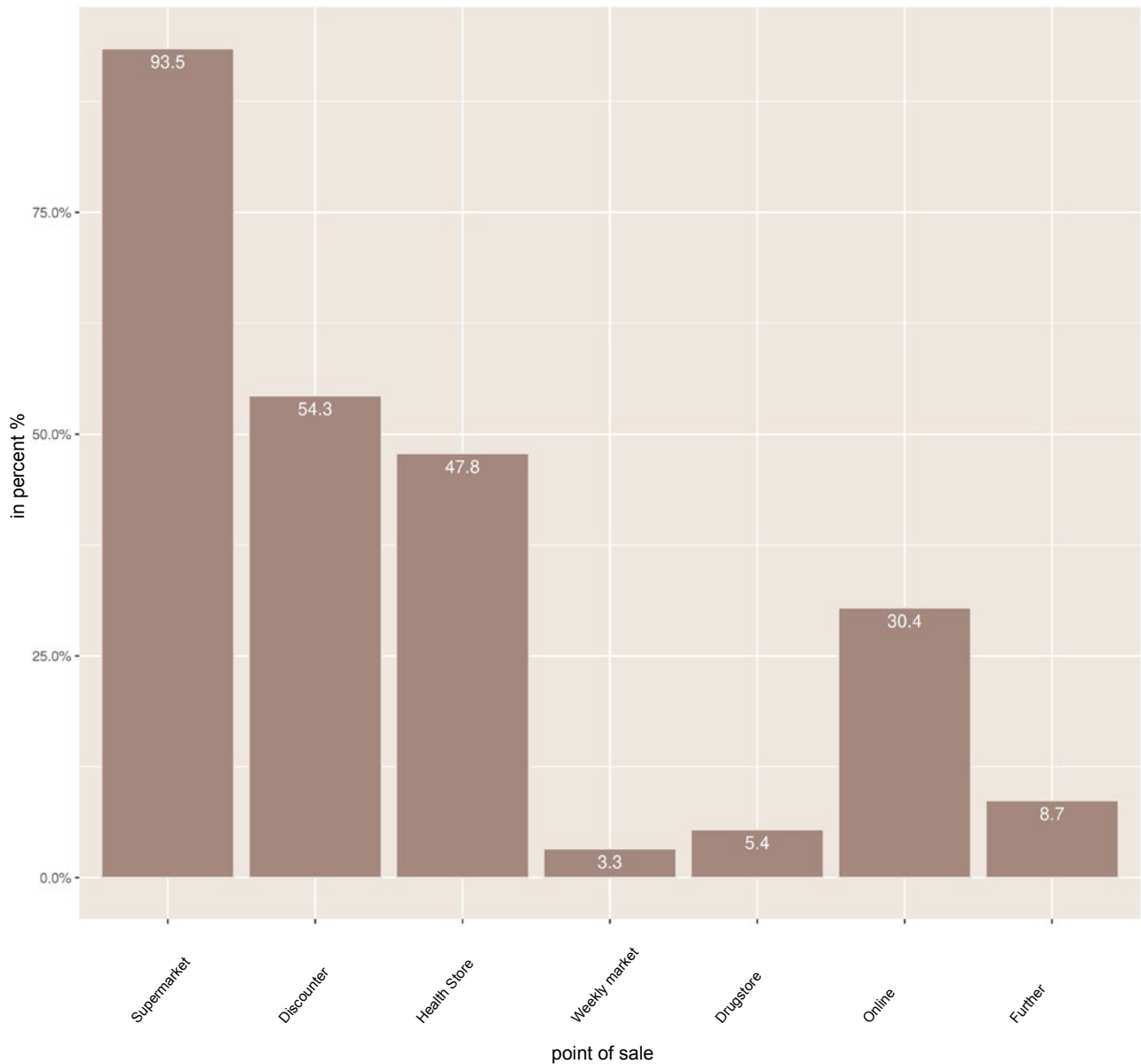


Source: Veganz Nutrition Survey

DENMARK

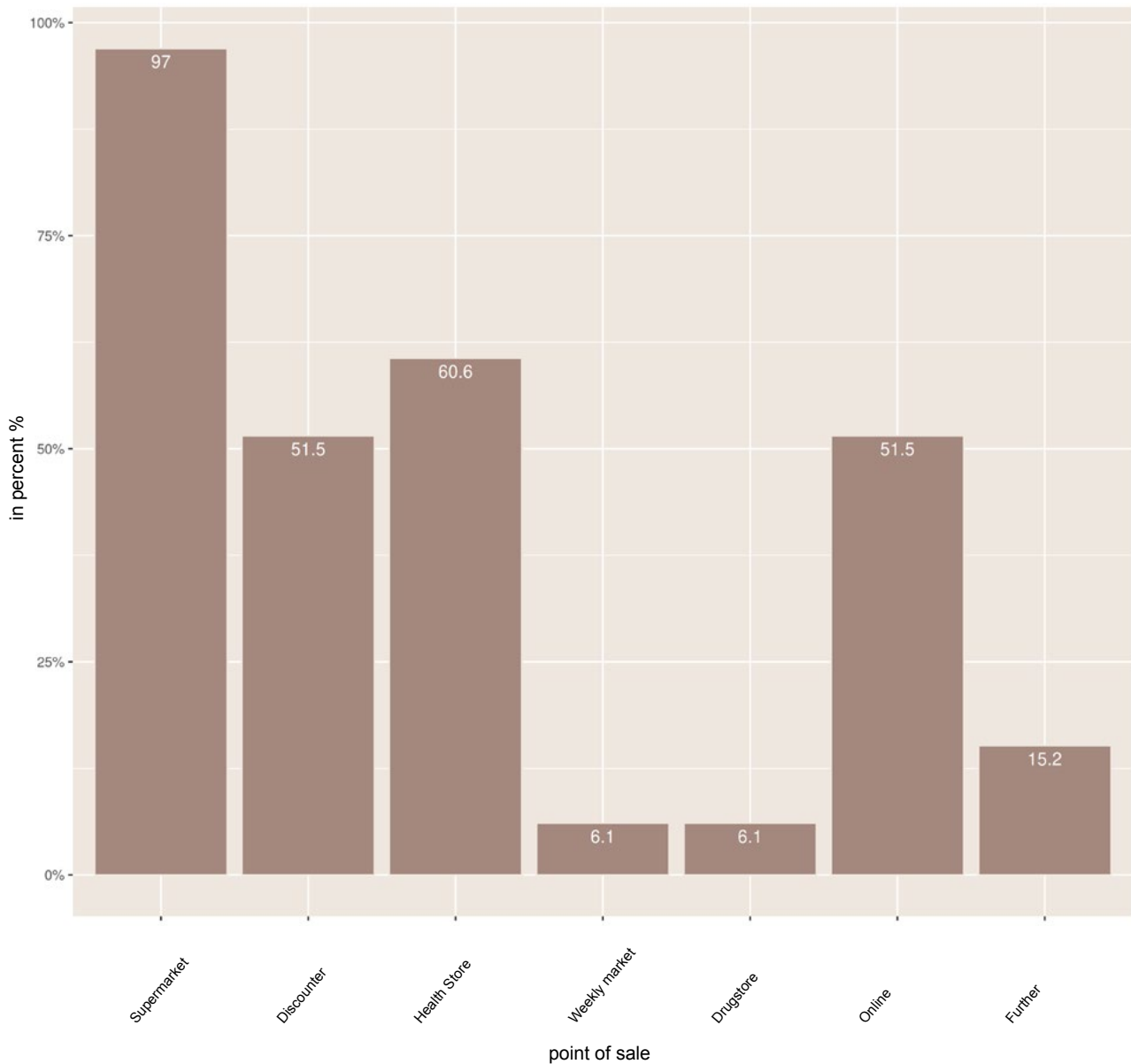
NON-VEGAN

Where do you buy food?
Veganz asked, danish non-vegans answered.



Source: Veganz Nutrition Survey

Where do you buy food?
Veganz asked, danish vegans answered.

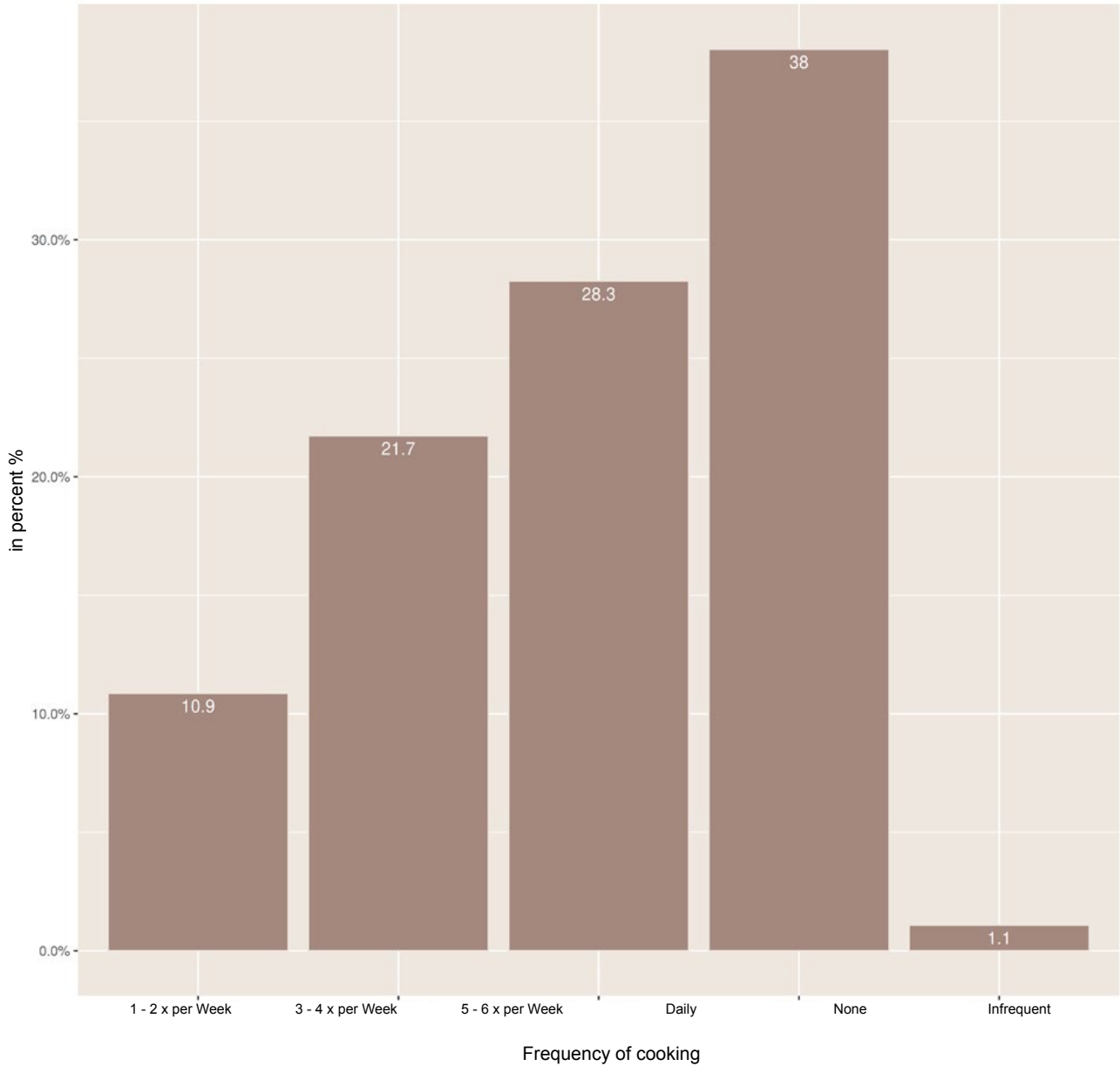


Source: Veganz Nutrition Survey

DENMARK

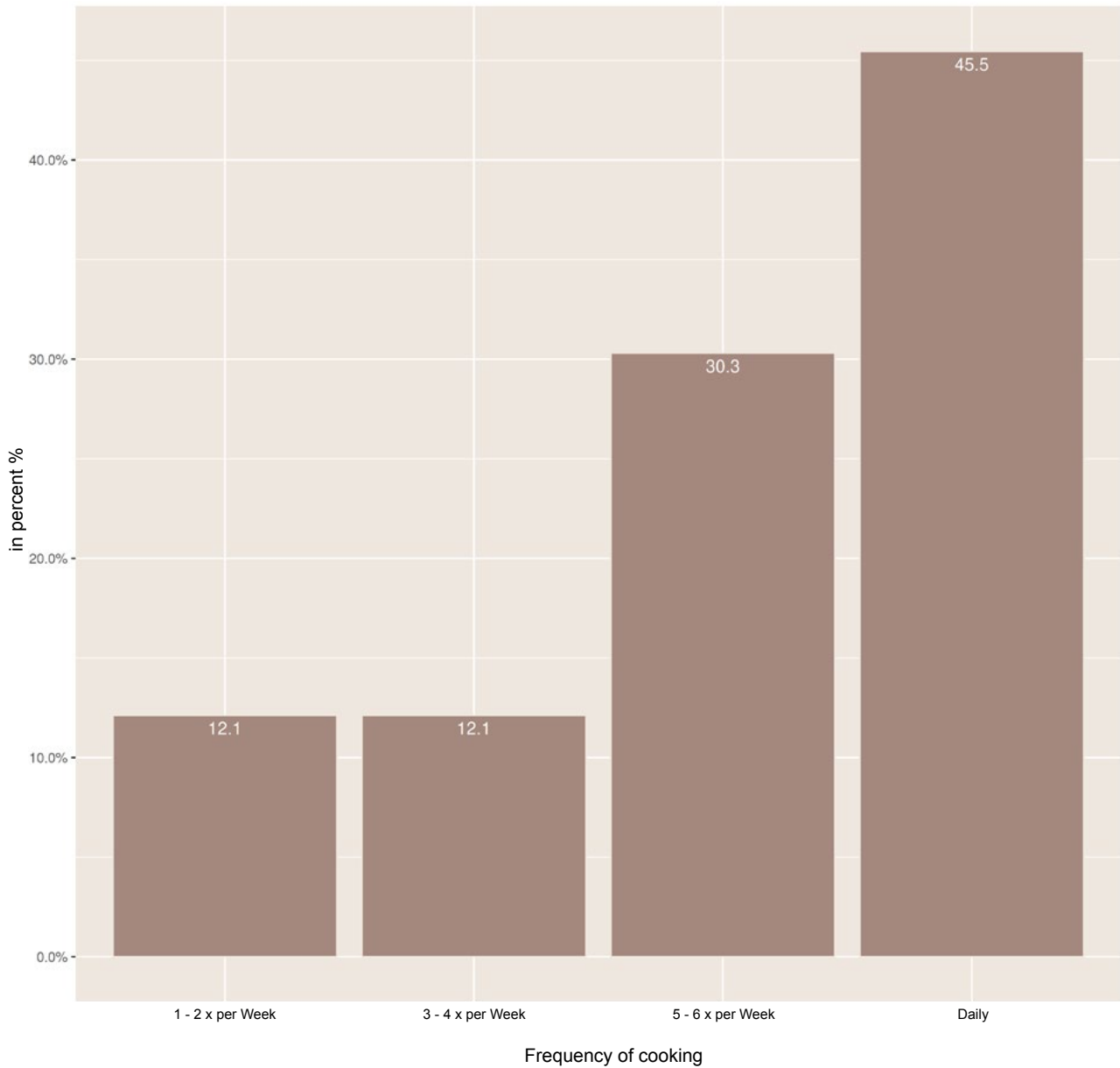
NON-VEGAN

How often do you cook?
Veganz asked, danish non-vegans answered.



Source: Veganz Nutrition Survey

How often do you cook?
Veganz asked, danish vegans answered.

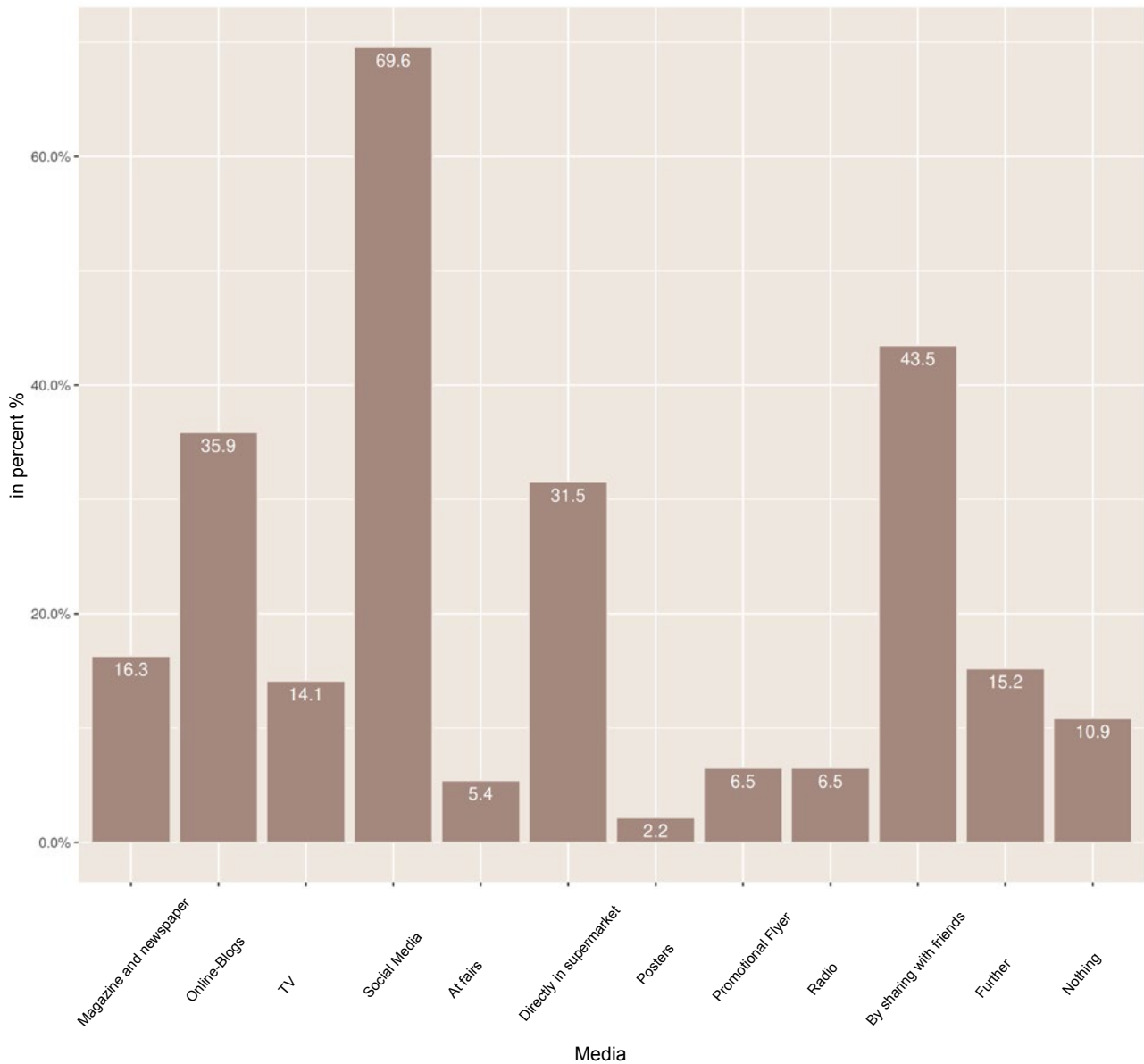


Source: Veganz Nutrition Survey

DENMARK

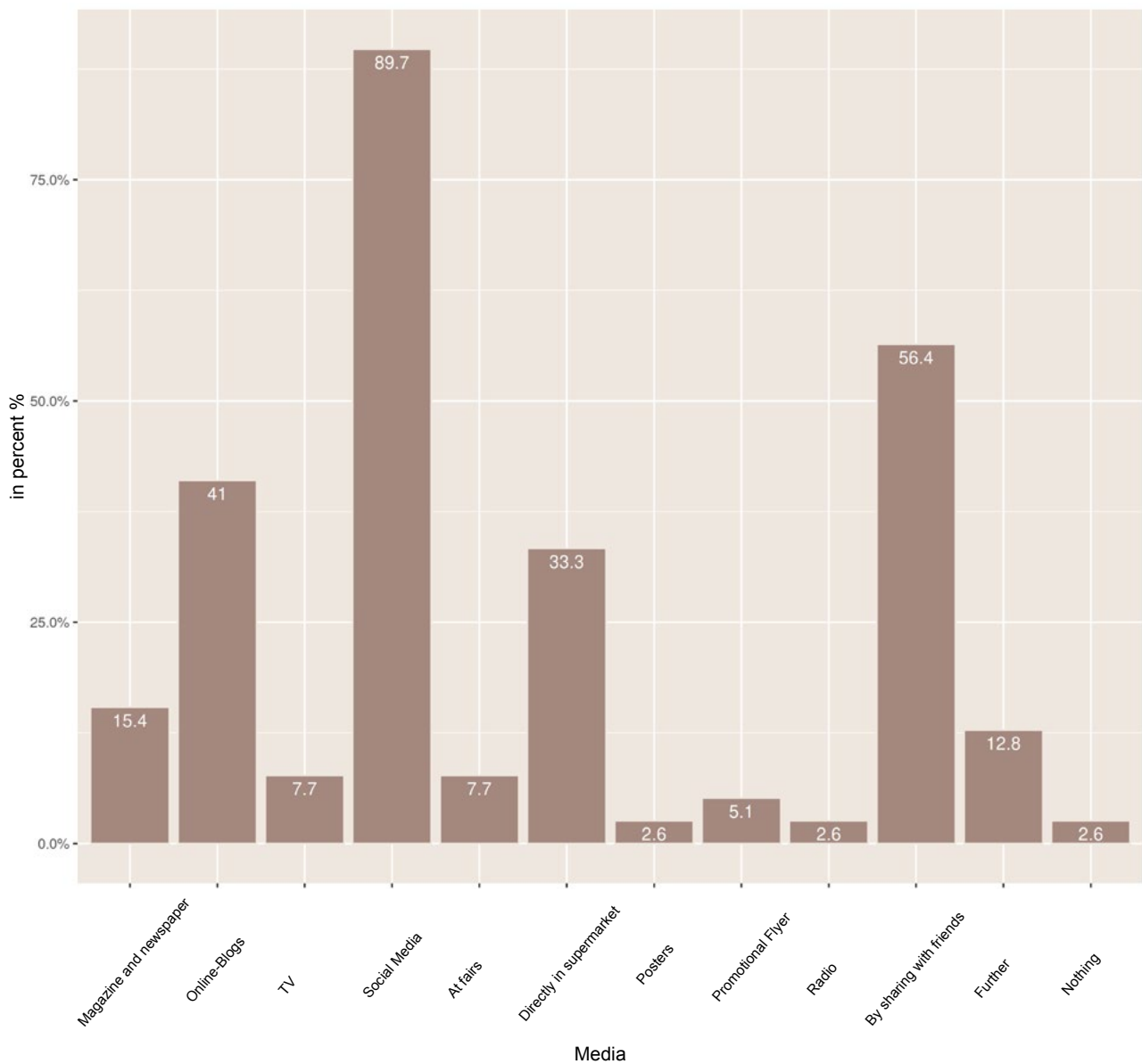
NON-VEGAN

Where do you find information about dietary trends and product innovations?
Veganz asked, danish non-vegans answered.



Source: Veganz Nutrition Survey

Where do you find information about dietary trends and product innovations?
Veganz asked, danish vegans answered.

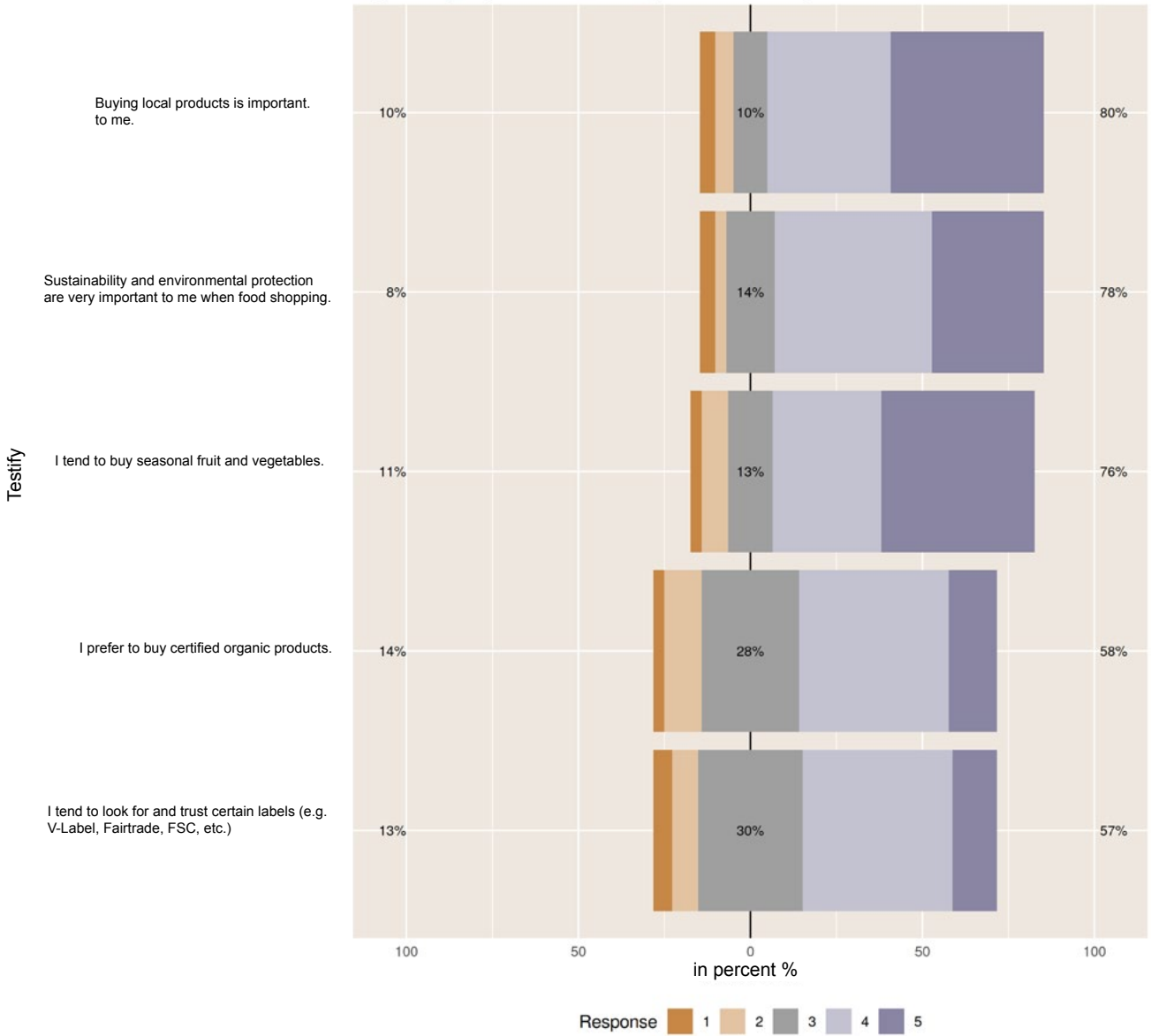


Source: Veganz Nutrition Survey

DENMARK

NON-VEGAN

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 Veganz asked, danish non-vegans answered.

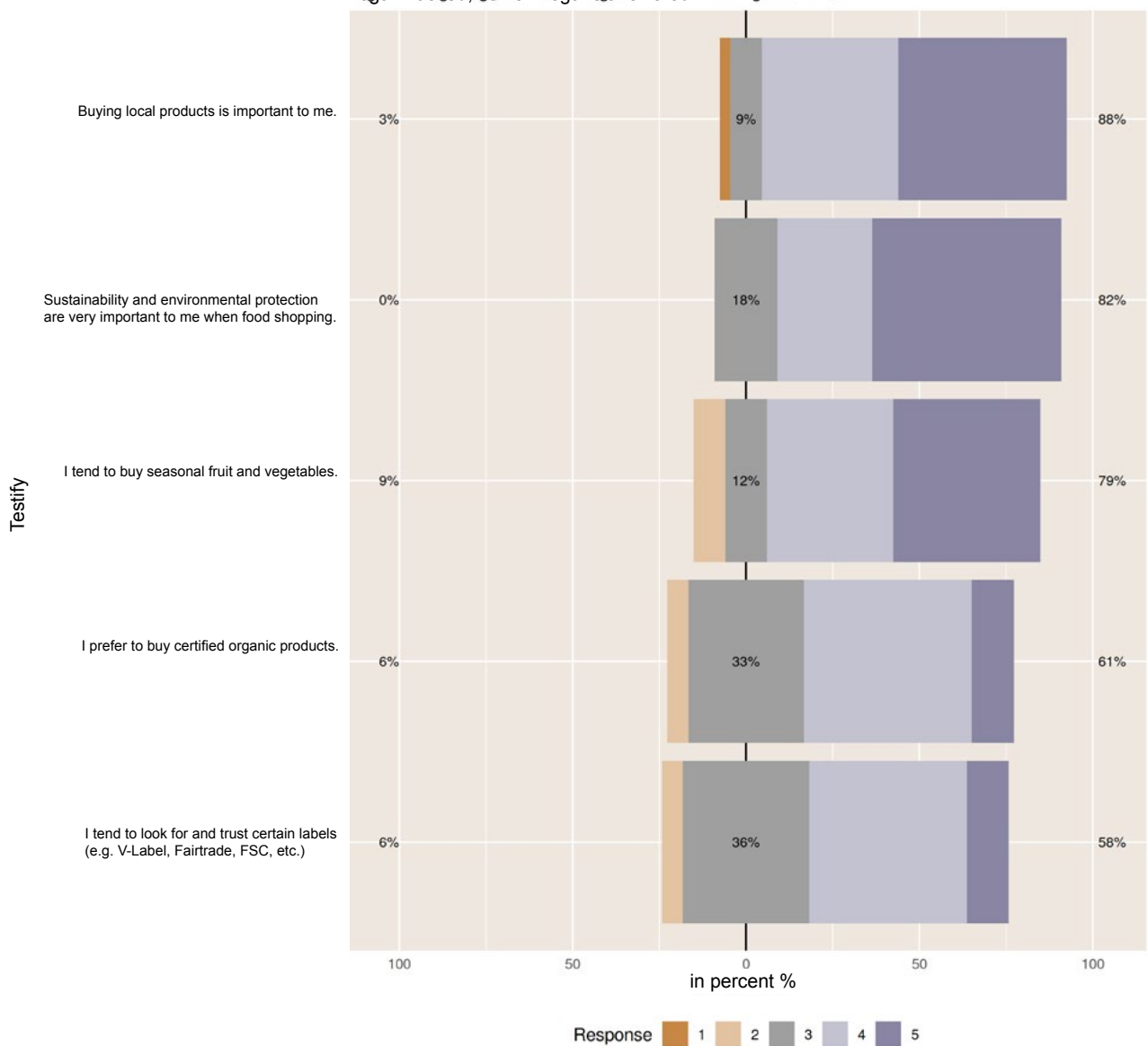


Source: Veganz Nutrition Survey

To what extent do the following statements describe you?

Scale from 1 "Totally agree" to 6 "Totally disagree"

Veganz asked, danish vegans answered.

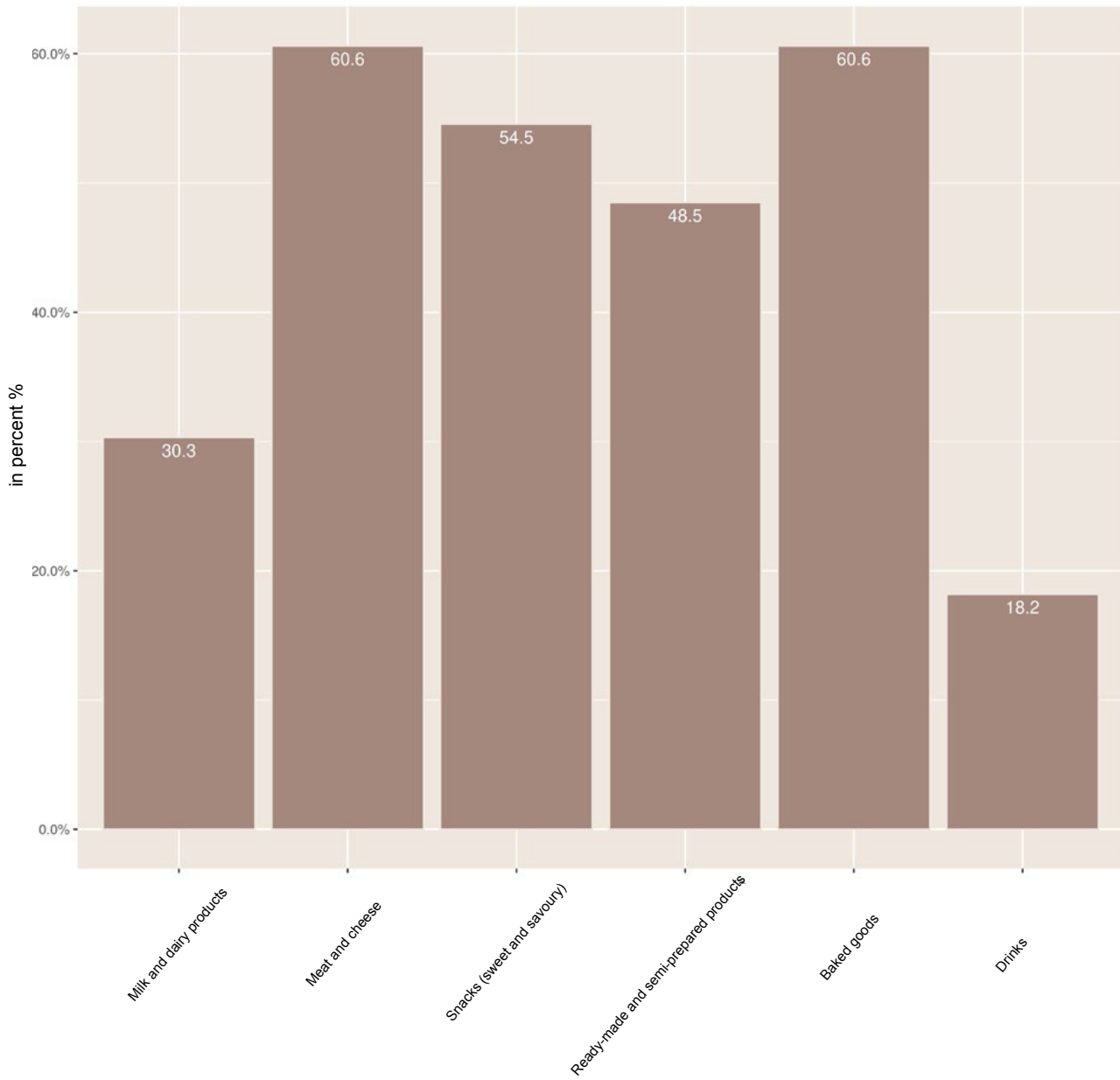


Source: Veganz Nutrition Survey

DENMARK

VEGAN

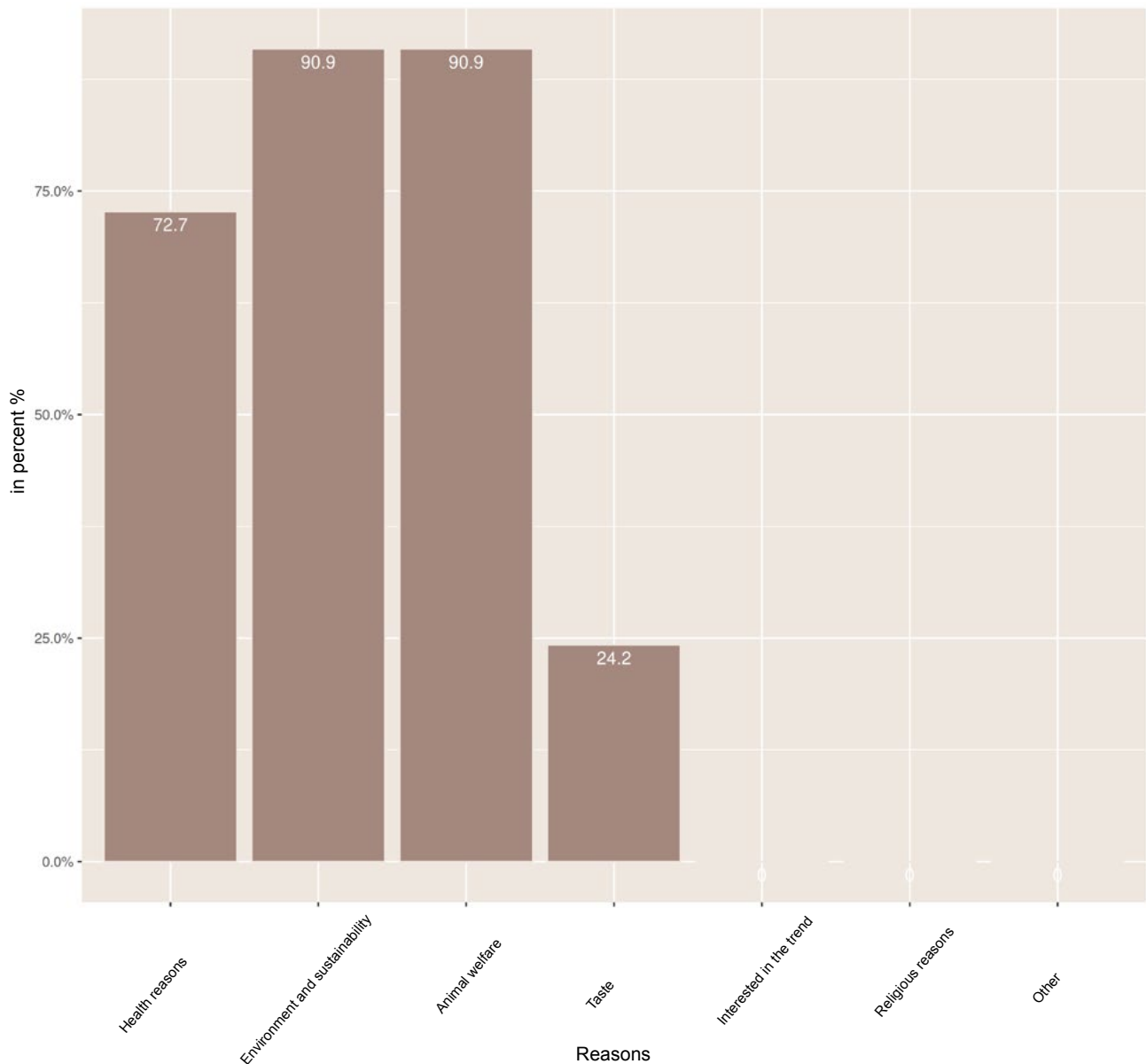
What type of vegan alternatives would you like to see more of?
Veganz asked, danish vegans answered.



Media

Source: Veganz Nutrition Survey

What are your reasons for eating vegan?
Veganz asked, danish vegans answered.

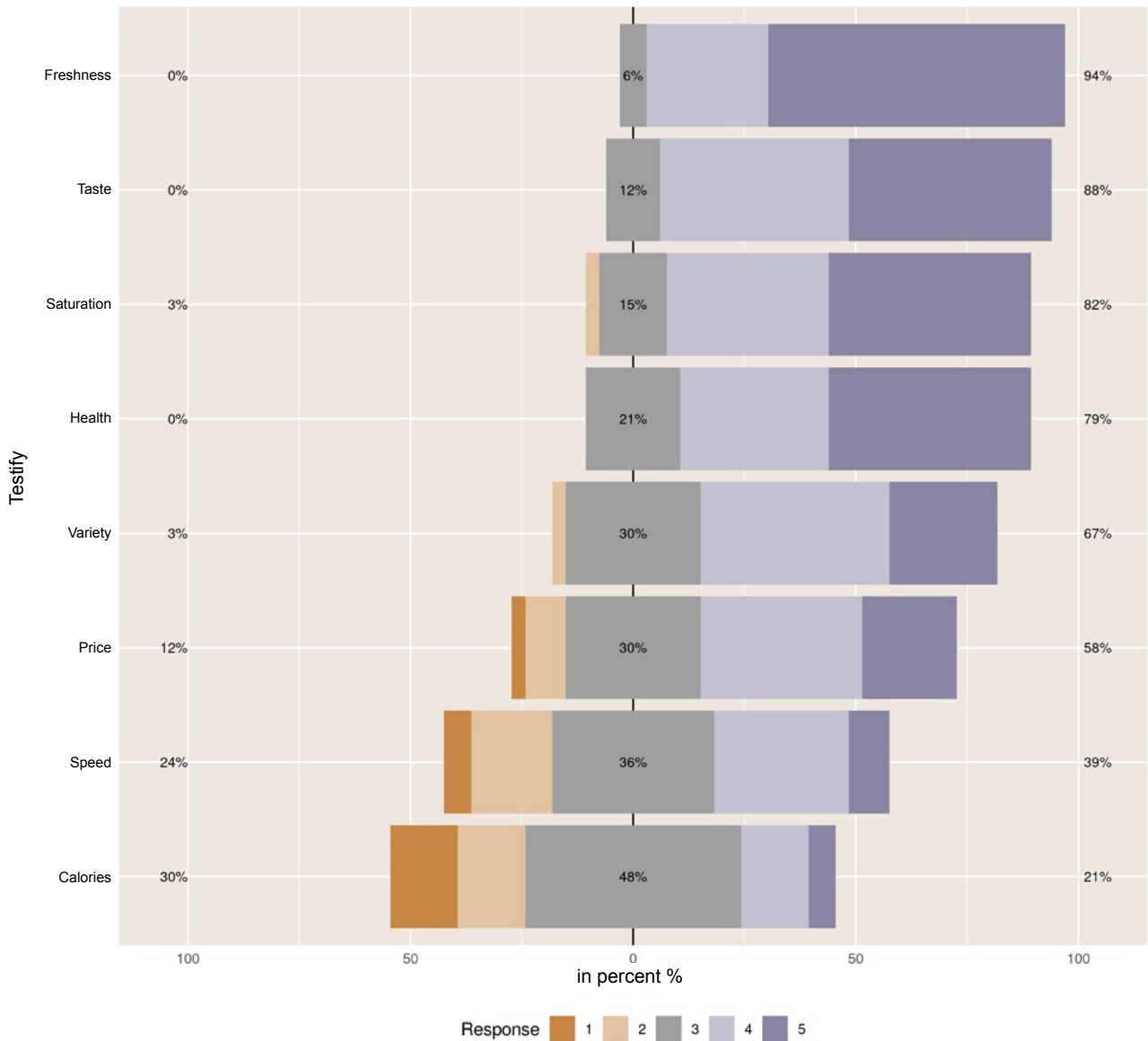


Source: Veganz Nutrition Survey

DENMARK

VEGAN

How important are the following factors to you when it comes to food?
 Scale of 1 "Very important" to 6 "Completely unimportant"
 Veganz asked, danish vegans answered.



Source: Veganz Nutrition Survey

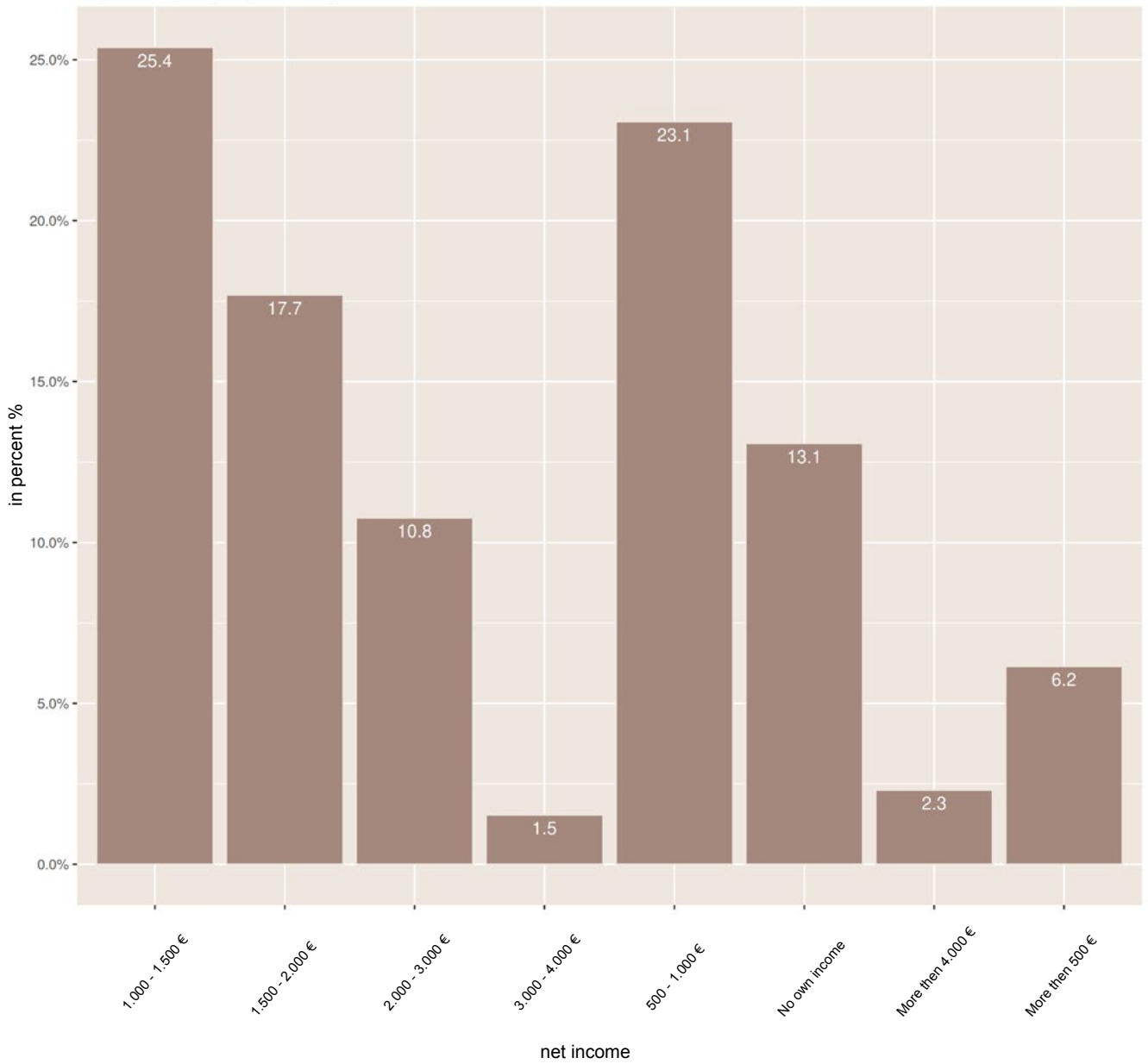
SPAIN

In Spain, 15 % of our respondents' average net income is between € 1,000 and € 1,500. 23 % have less at their disposal with 500 - 1,000 € per month. Of the Spanish vegans, 88.9 % stated animal welfare as their reason. 83.3 % would like to protect the environment and 47.2 % attribute the plant-based diet and lifestyle to having positive effects on health. More than 60 % of the Spanish cook themselves – with and without animal products.

Spanish vegans especially utilise various social media outlets to get informed about new products and dietary trends. Online blogs and talking with friends are also beloved ways in which they widen their culinary horizons. And at least a fourth of Spanish vegans visit trade fairs or get information directly from their supermarkets. For the other nutrition groups, magazines and newspapers are an interesting source of information - but only after the top 3 channels of social media,

online blogs and direct exchange with others. Almost all Spaniards do their shopping in supermarkets. 80 % of vegans visit health food stores as well – that's 20 % more than with Spanish non-vegans. In addition, twice as many vegans shop for their food online as people from the other nutrition groups. Quality and taste are equally important for Spanish vegans. They also care about the ingredients, sustainability and freshness of their plant-based products. In comparison, organic certifications, innovations and brand awareness are less important. Almost 70 % of Spanish participants say there is a lack of alternatives to cured meats and cheese. Also, for 47 % the selection of baked goods is too limited. Seasonality plays a big role in Spain for all nutrition groups as do regionality and environmental protection when purchasing food. In contrast, certified organic products have less influence on whether an item lands in the shopping cart or not.

What is your net monthly income?
Veganz asked, spanish answered.

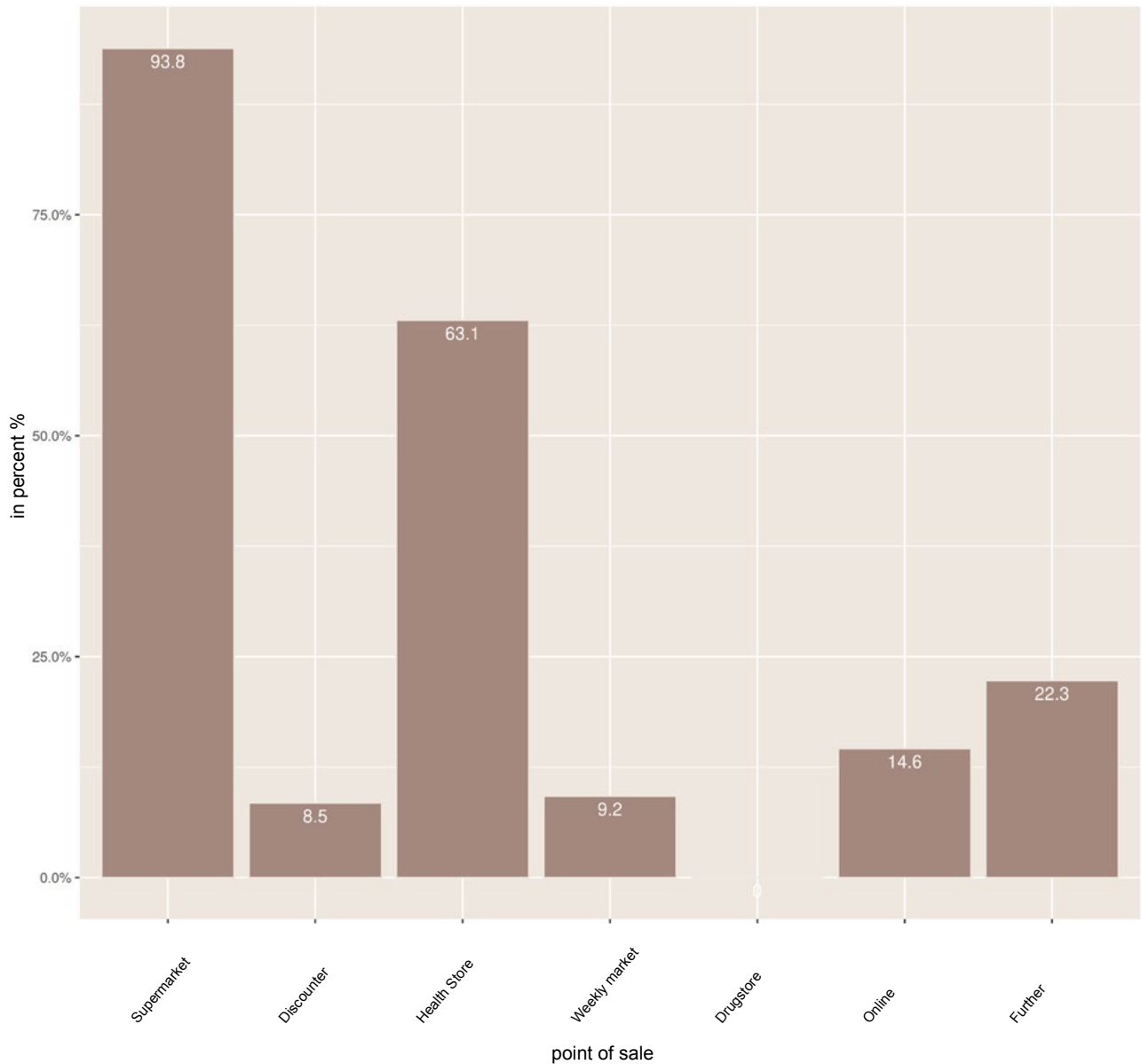


Source: Veganz Nutrition Survey

SPAIN

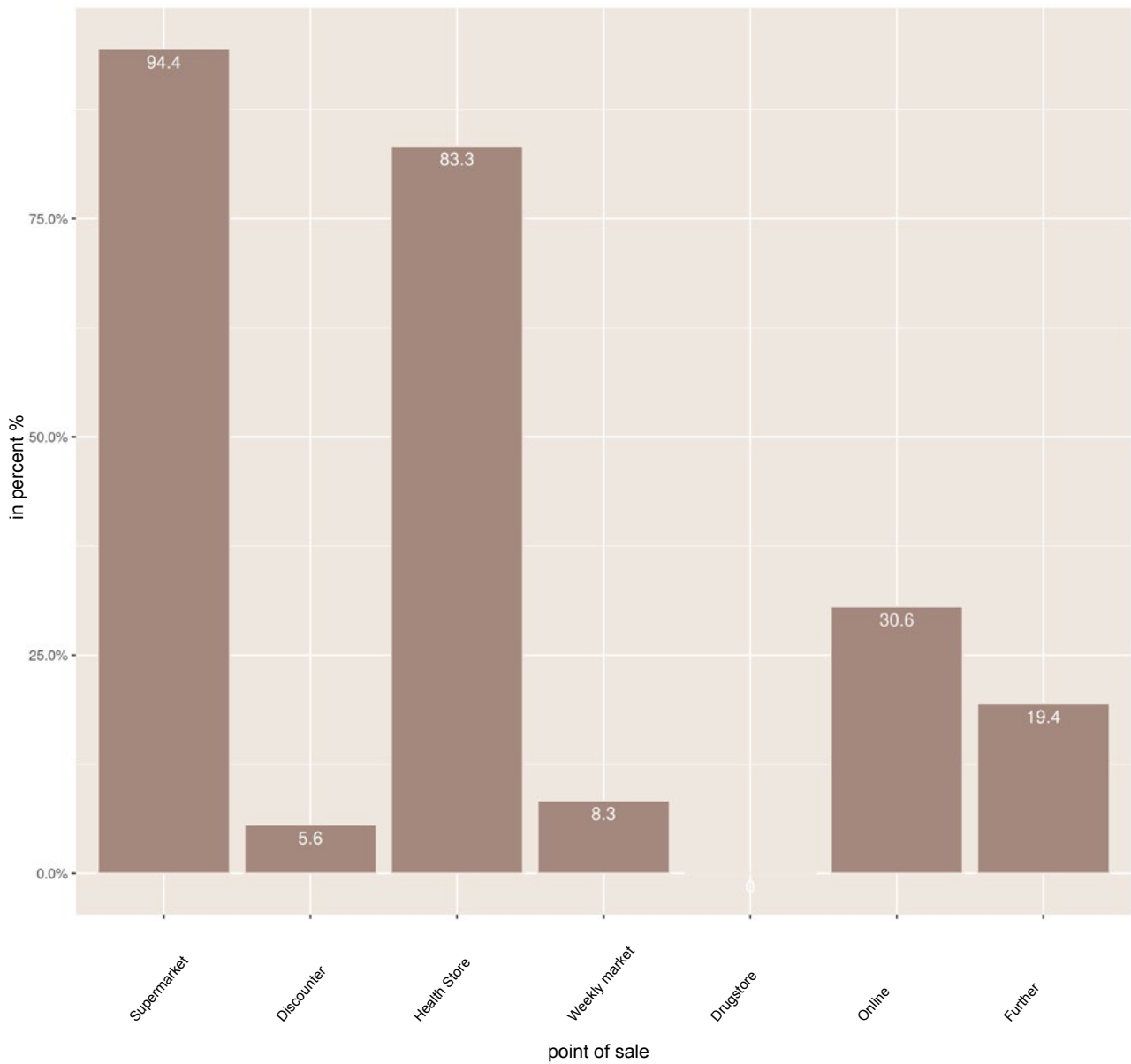
NON-VEGAN

Where do you buy food?
Veganz asked, spanish non-vegans answered.



Source: Veganz Nutrition Survey

Where do you buy food?
Veganz asked, spanish vegans answered.

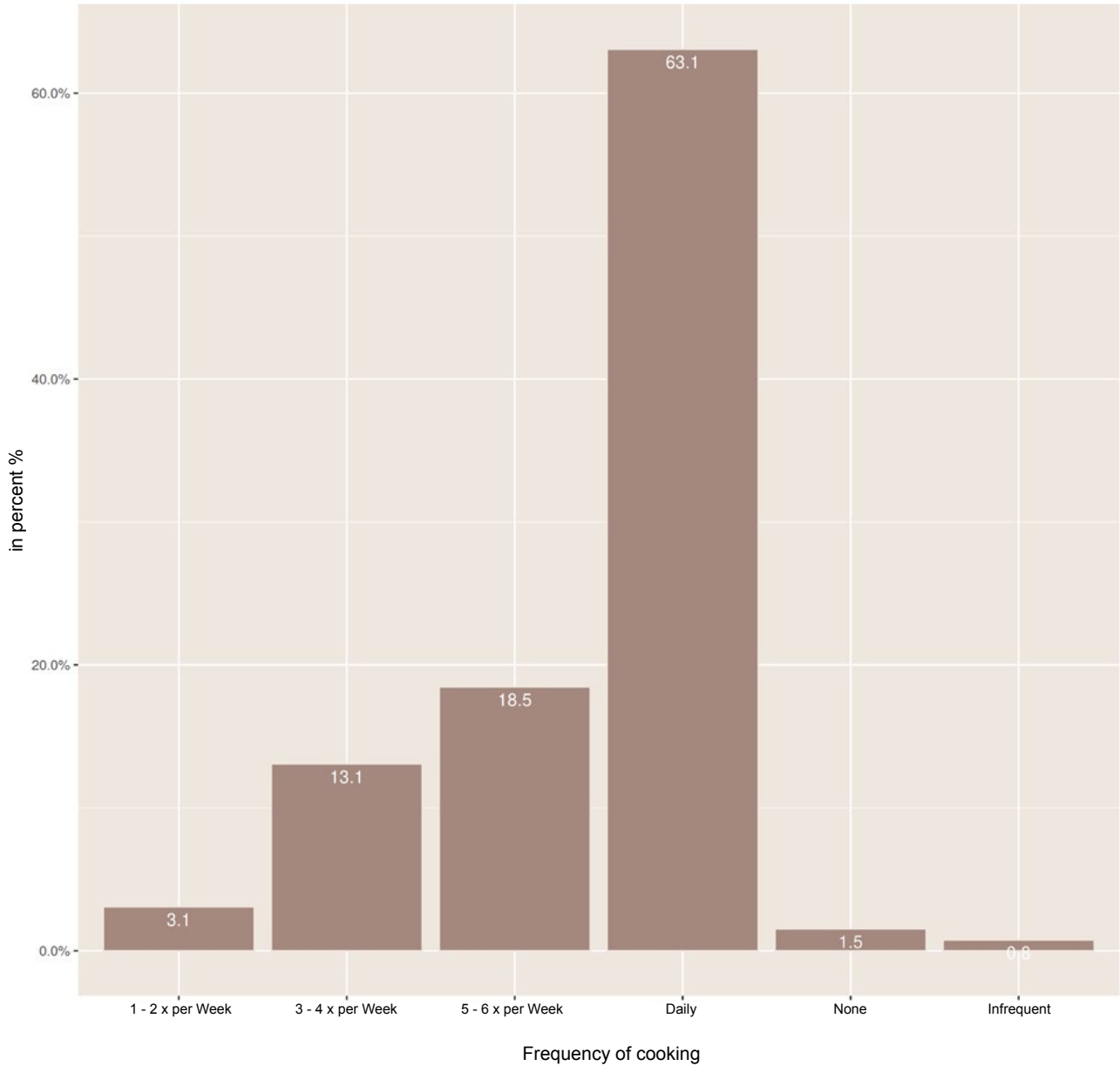


Source: Veganz Nutrition Survey

SPAIN

NON-VEGAN

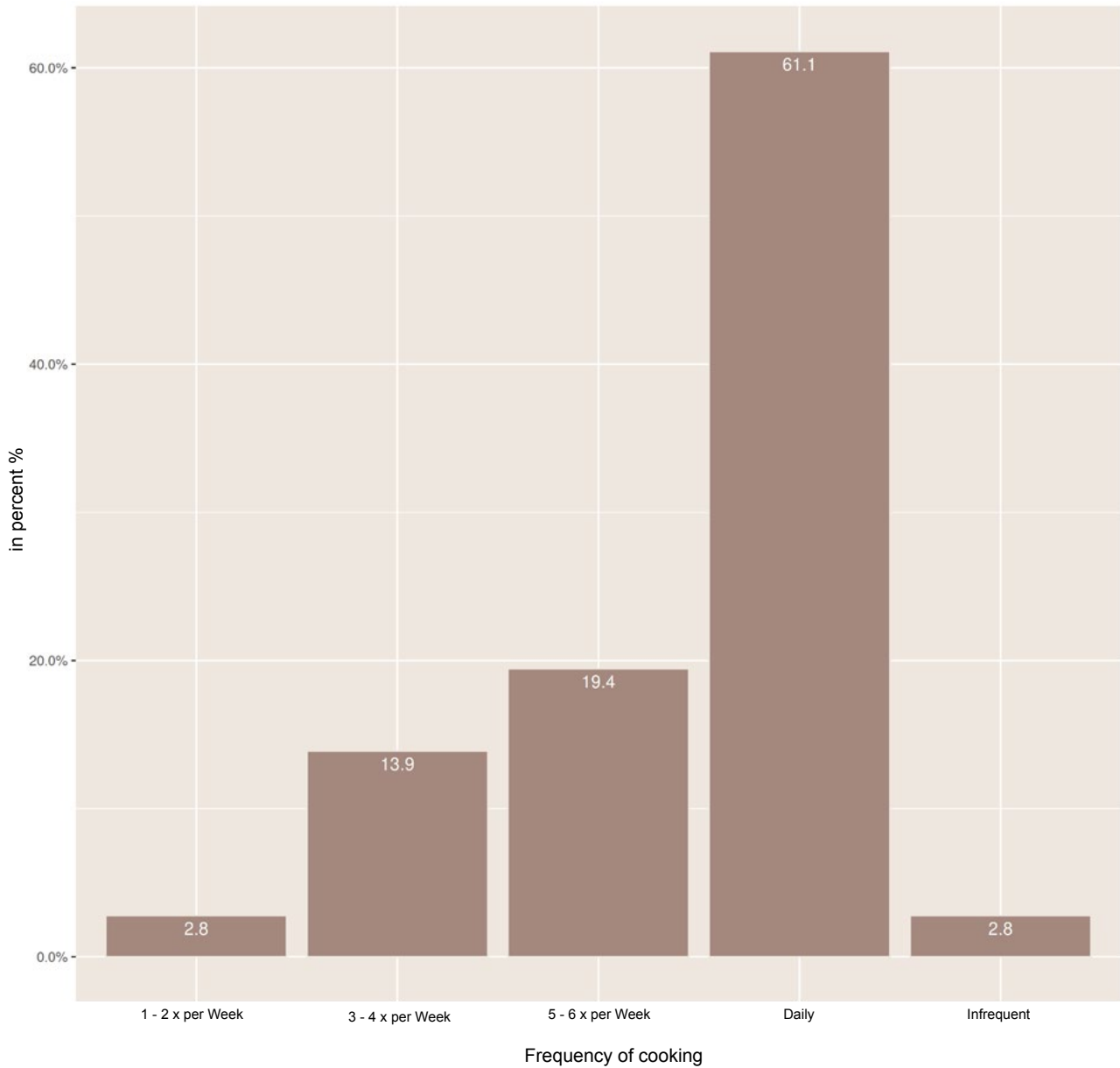
How often do you cook?
VeganZ asked,spanish non-vegans answered.



Source: VeganZ Nutrition Survey

How often do you cook?

Veganz asked, spanish vegans answered.

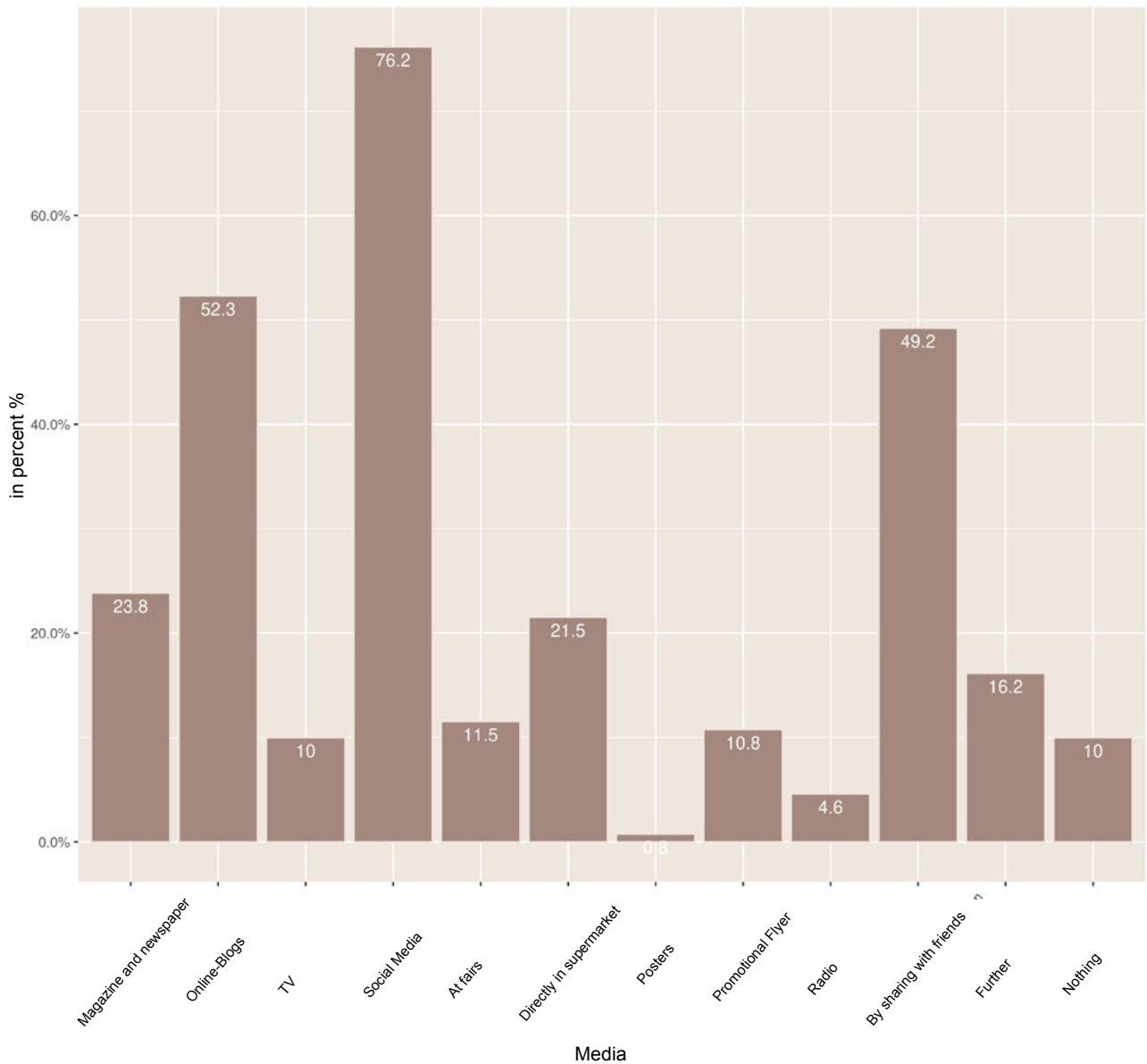


Source: Veganz Nutrition Survey

SPAIN

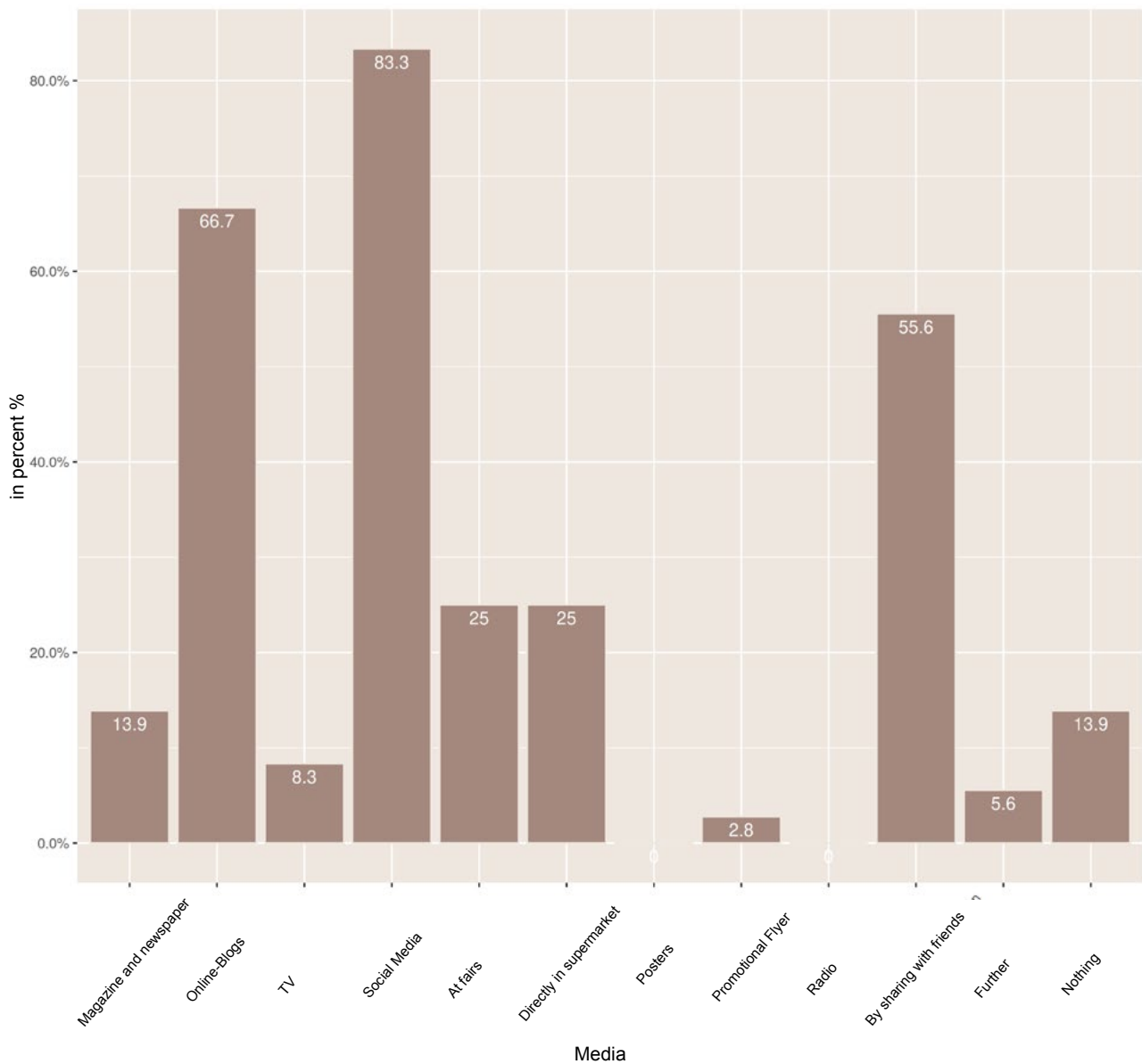
NON-VEGAN

Where do you find information about dietary trends and product innovations?
 VeganZ asked, spanish non-vegans answered.



Source: VeganZ Nutrition Survey

Where do you find information about dietary trends and product innovations?
Veganz asked, spanish vegans answered.



Source: Veganz Nutrition Survey

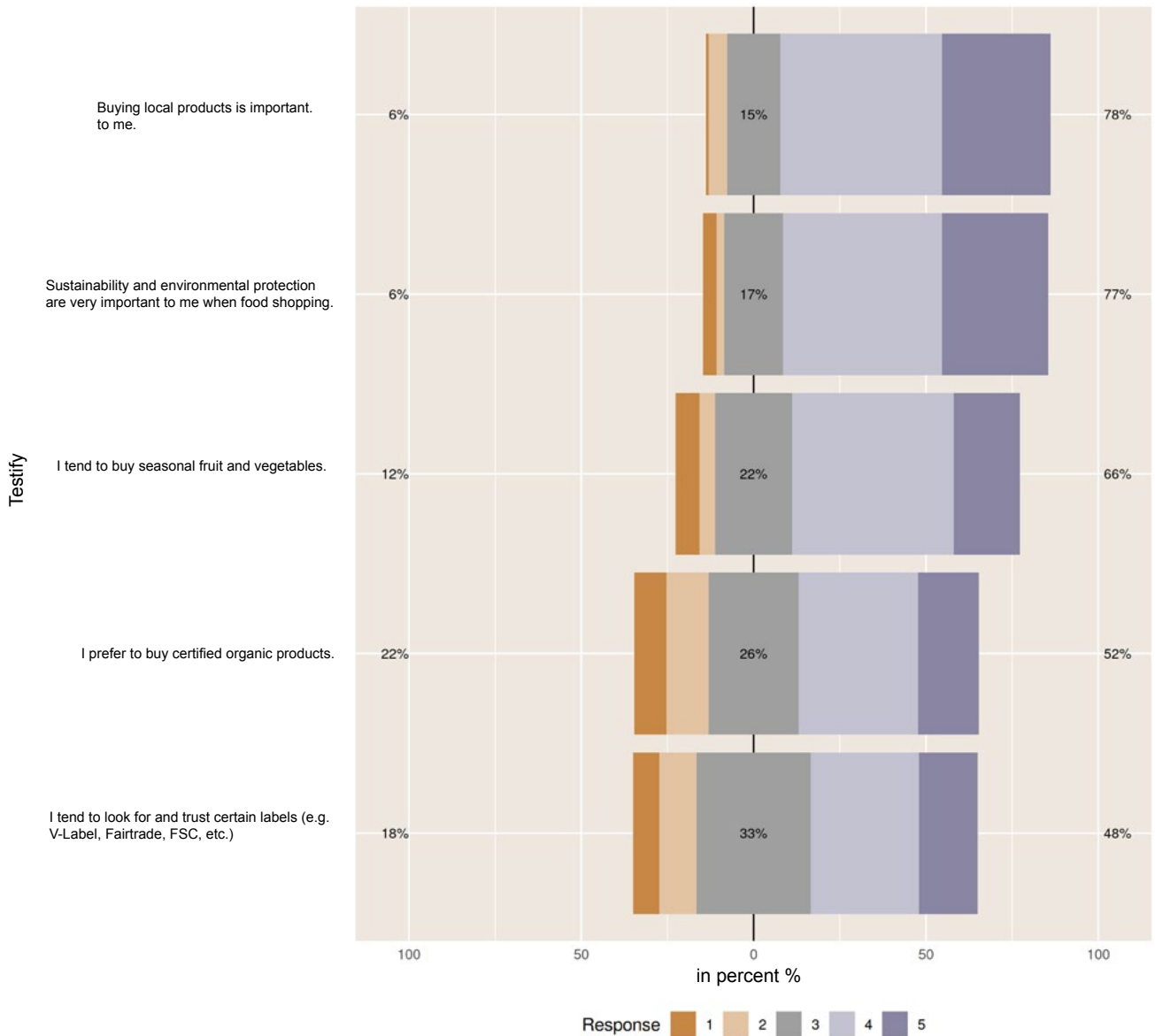
SPAIN

NON-VEGAN

To what extent do the following statements describe you?

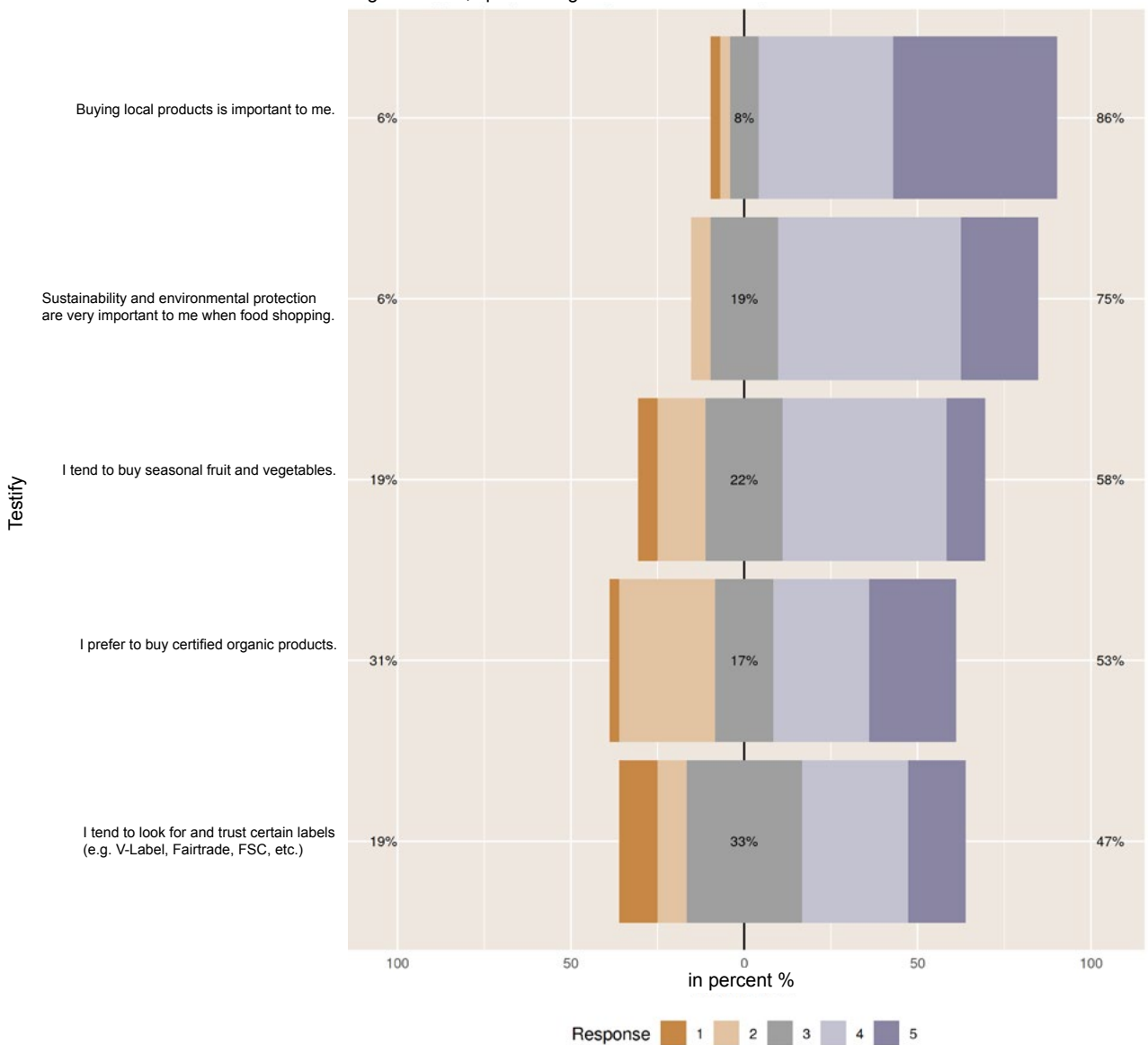
Scale from 1 "Totally agree" to 6 "Totally disagree"

Veganz asked, spanish non-vegans answered.



Source: Veganz Nutrition Survey

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 Veganz asked, spanish vegans answered.

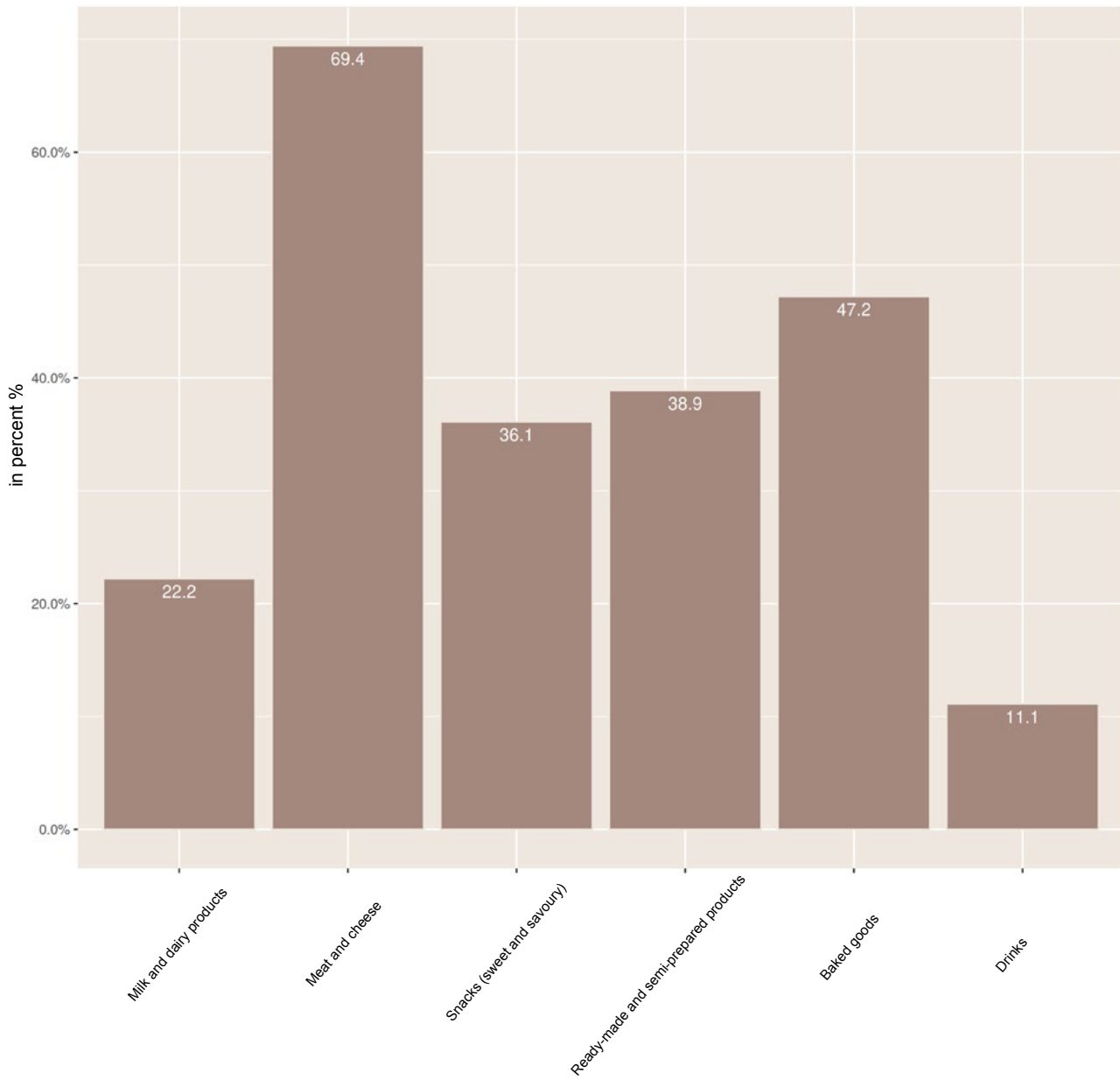


Source: Veganz Nutrition Survey

SPAIN

VEGAN

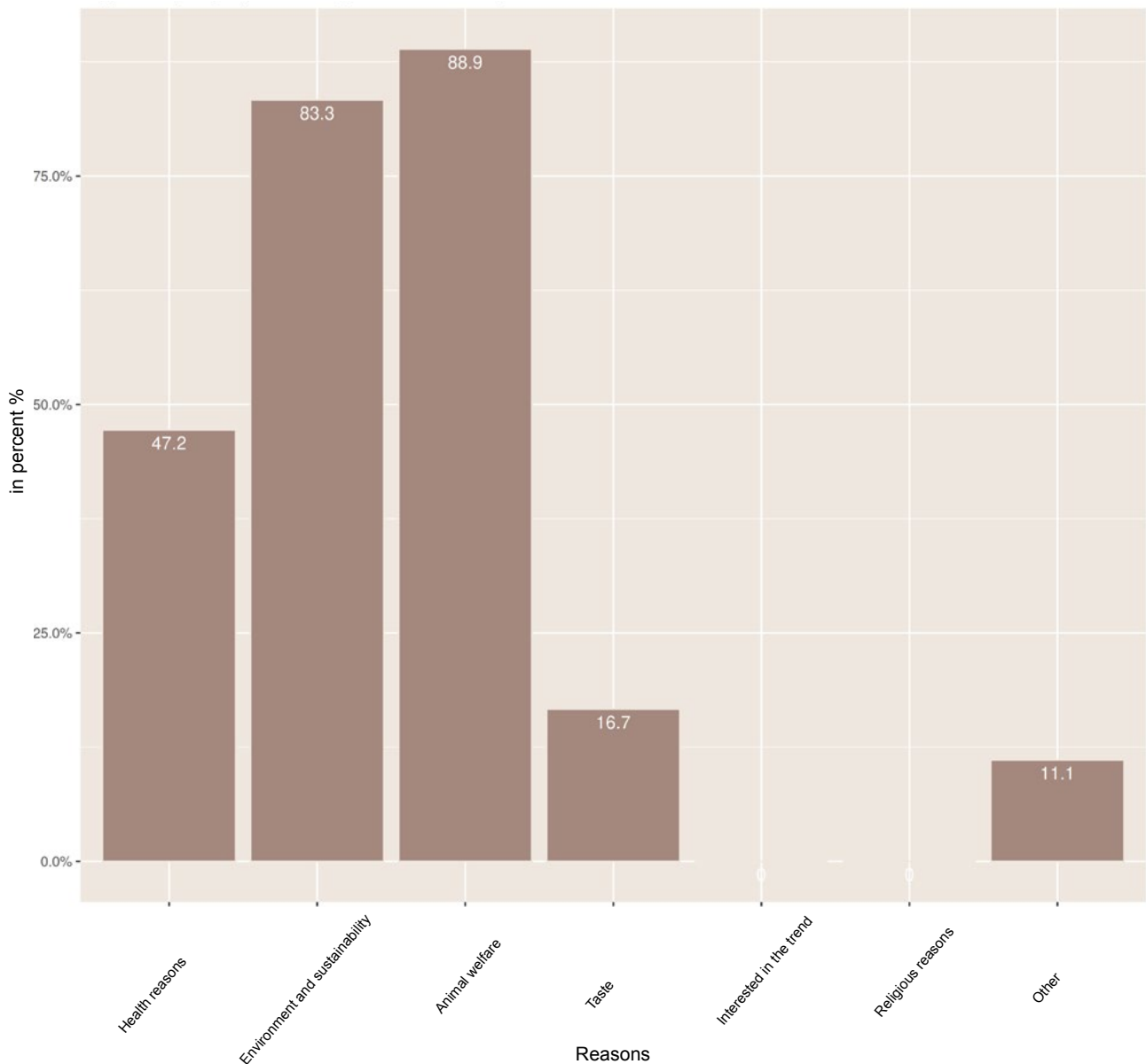
What type of vegan alternatives would you like to see more of?
Veganz asked, spanish vegans answered.



Media

Source: Veganz Nutrition Survey

What are your reasons for eating vegan?
Veganz asked, spanish vegans answered.

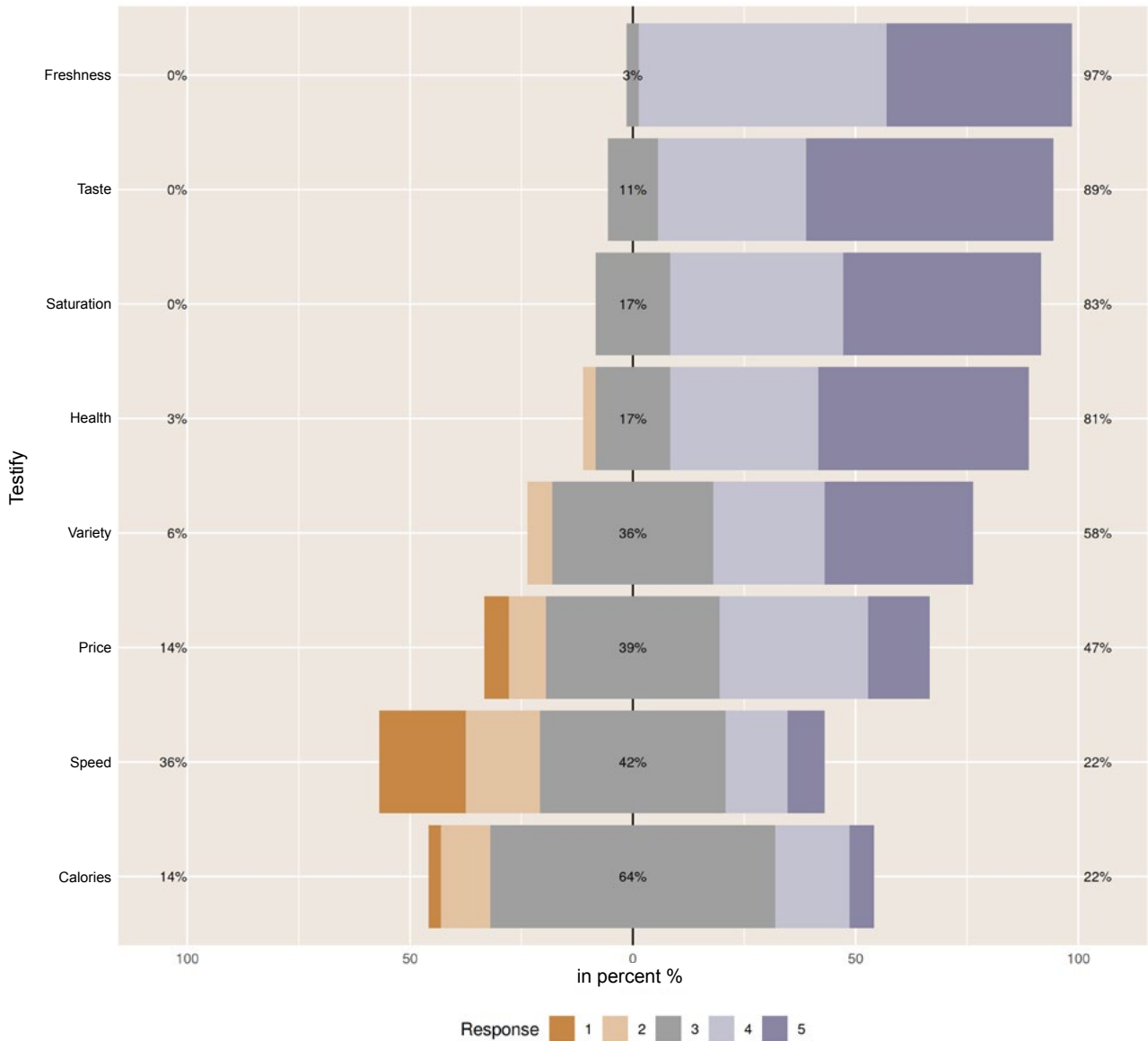


Source: Veganz Nutrition Survey

SPAIN

VEGAN

How important are the following factors to you when it comes to food?
 Scale of 1 "Very important" to 6 "Completely unimportant"
 Veganz asked, spanish vegans answered.



Source: Veganz Nutrition Survey

GERMANY

24,2 % of participants in Germany said they had a monthly net income of 2.000 - 3.000 € at their disposal. Overall, the distribution of income is relatively balanced. Of those vegans surveyed, animal welfare was the main motivation for adopting a plant-based diet at 94,3 % followed by the environment and sustainability, as well as health reasons.

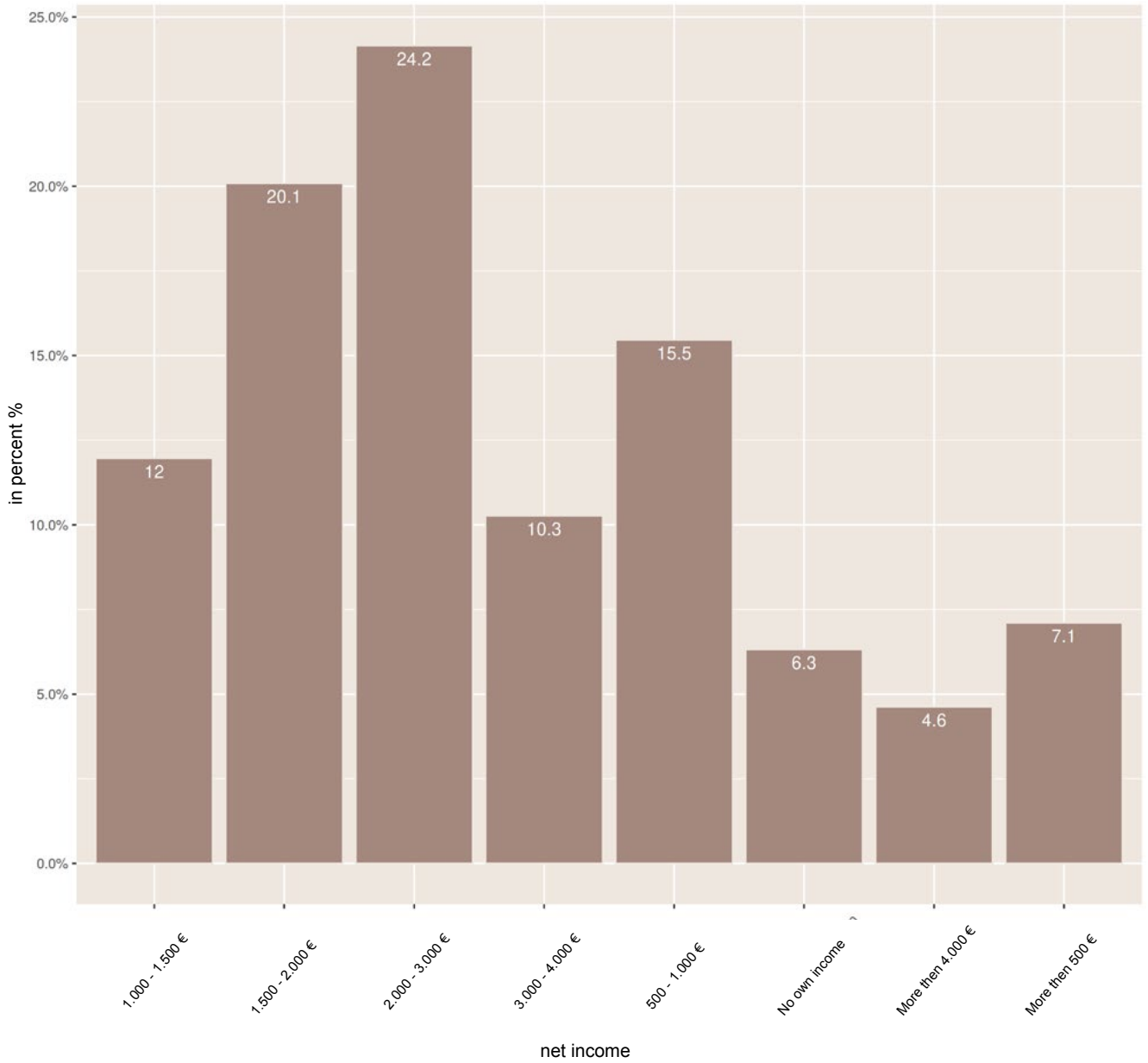
The willingness to cook is a very strong tendency in Germany among vegans as well as non-vegans. 37 % of German vegans and 33 % of non-vegans like to cook at home. The majority cook once a week themselves but with most of them it's more like 5 or 6 times.

German vegans prefer social media for their information about new trends in the food industry. Second place are online blogs. Non-vegans would rather talk with their friends. Choice of stores differs only slightly between German vegans and the other nutritional groups. Both prefer to shop for food at the supermarket followed by the health and

drug stores. Even half of those surveyed shop every so often at discount. For Germans, taste, quality, and, most importantly, sustainability plays an important role when buying vegan products. Less important are brand awareness and the innovation factor. In the same context, price has a relatively small influence on purchases.

More than half of German vegans would like to see more variety in the areas of plant-based baked goods as well as cured meats and cheese alternatives. Almost a third think there is a lack of milk alternatives, sweets and snacks as well as readymade- and semi-readymade meals. German vegans and non-vegans alike hardly differ in their general purchasing behaviour: Both pay more attention to sustainability and environmental protection and prefer to buy certified organic products. In comparison, those surveyed pay less attention to the seasonality and regionality of the products.

What is your net monthly income?
Veganz asked, Germans answered.

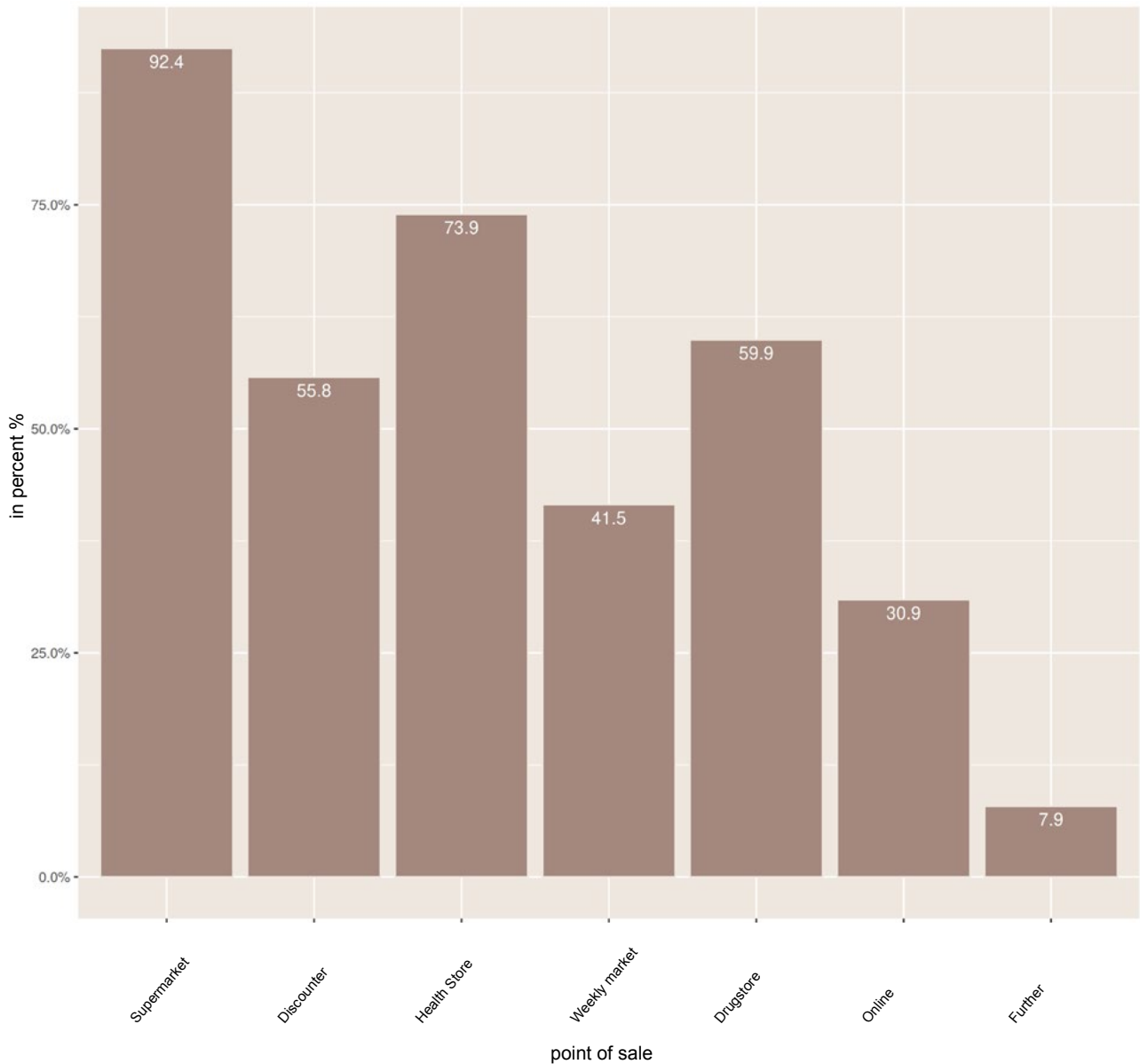


Source: Veganz Nutrition Survey

GERMANY

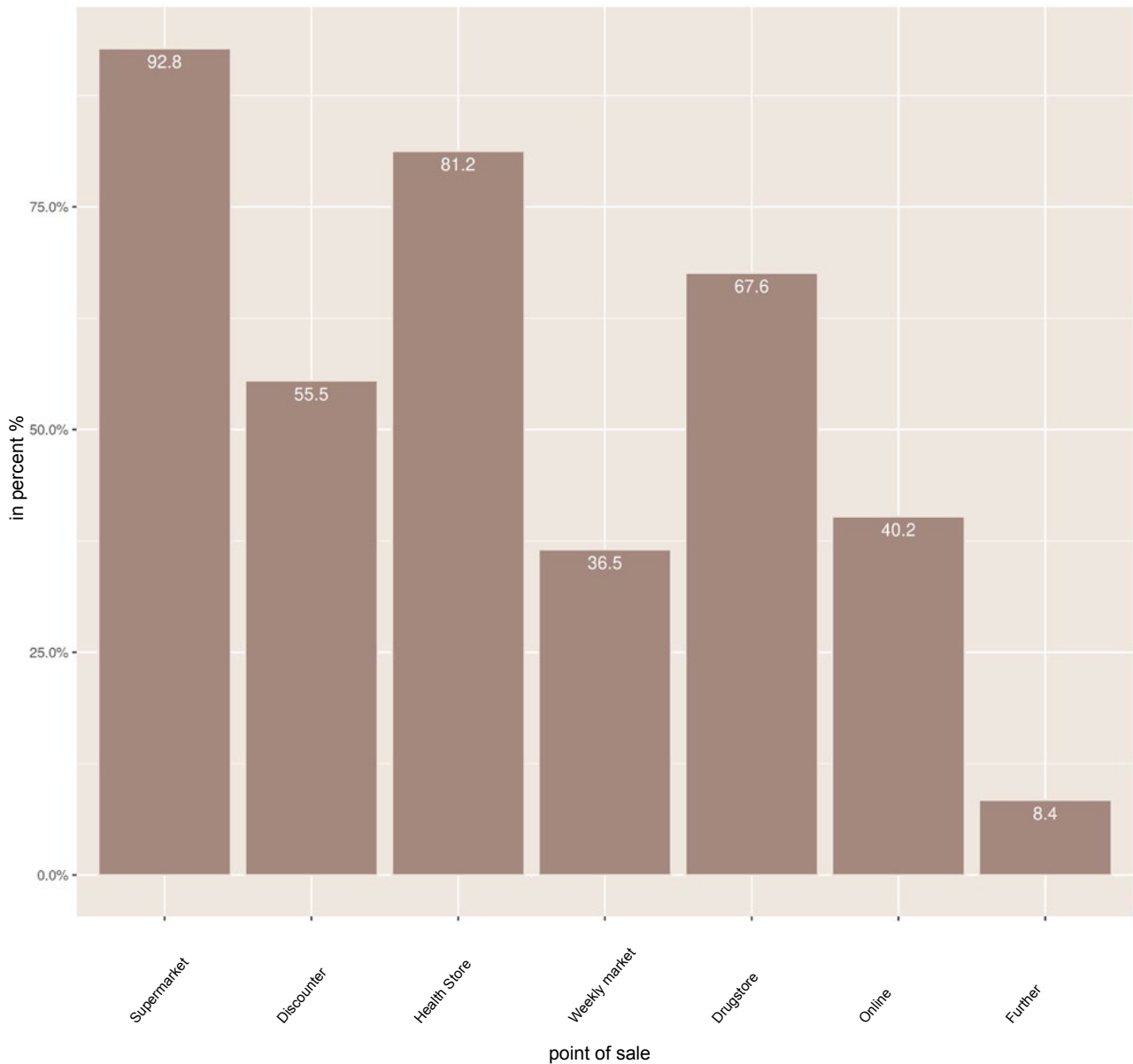
NON-VEGAN

Where do you buy food?
Veganz asked, germans non-vegans answered.



Source: Veganz Nutrition Survey

Where do you buy food?
Veganz asked, germans vegans answered.



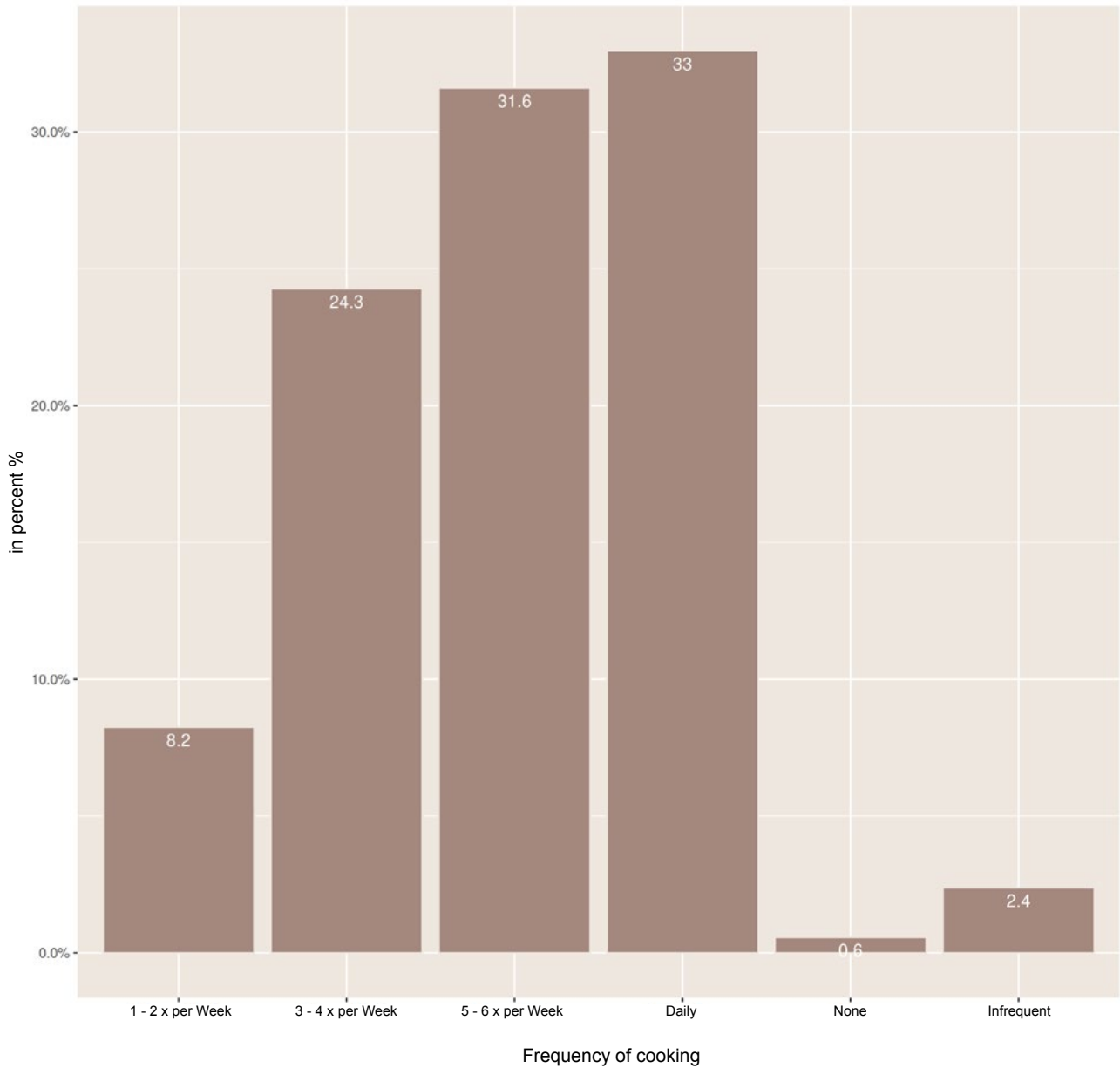
Source: Veganz Nutrition Survey

GERMANY

NON-VEGAN

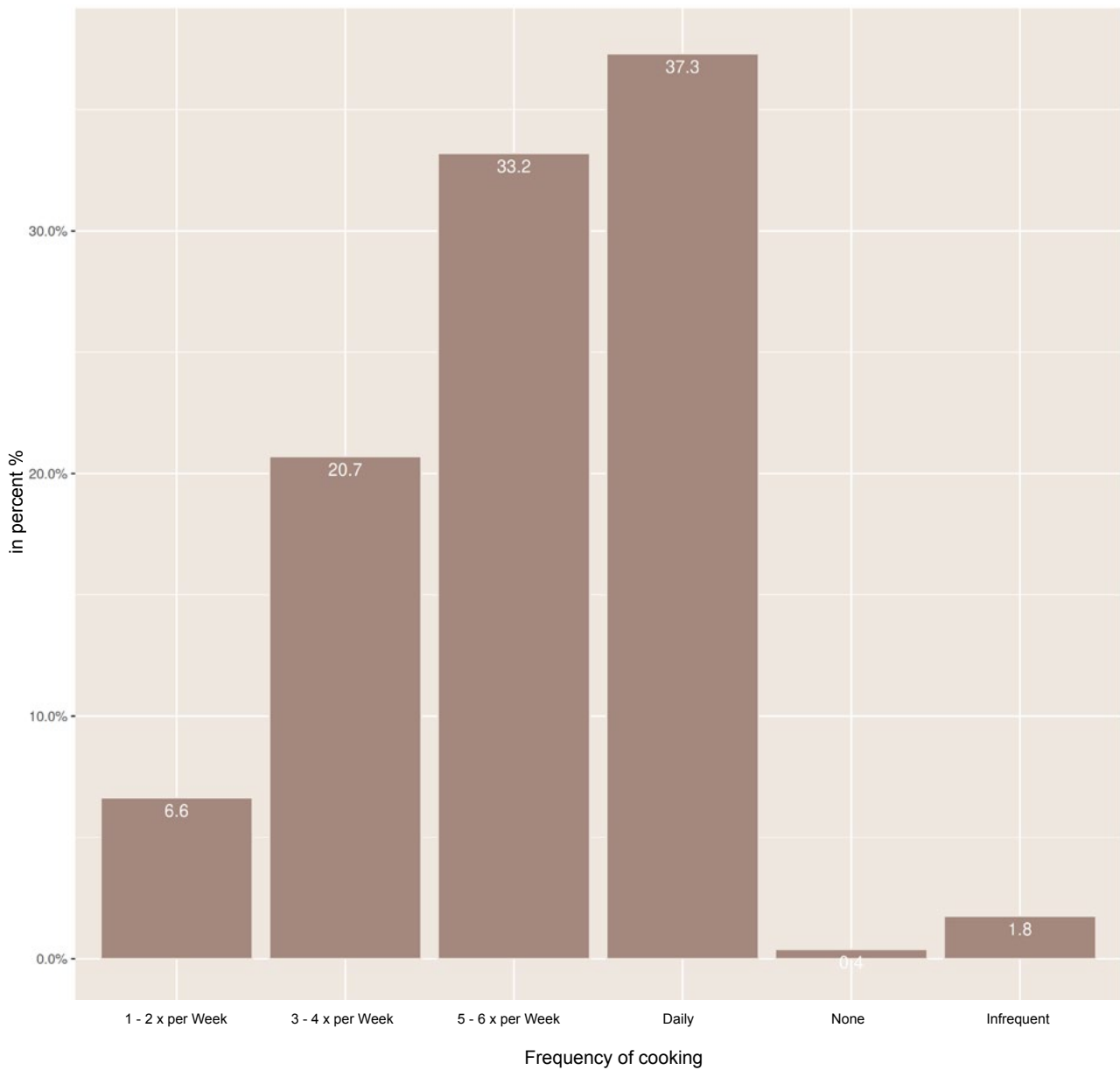
How often do you cook?

Veganz asked, germans non-vegans answered.



Source: Veganz Nutrition Survey

How often do you cook?
Veganz asked, germans vegans answered.

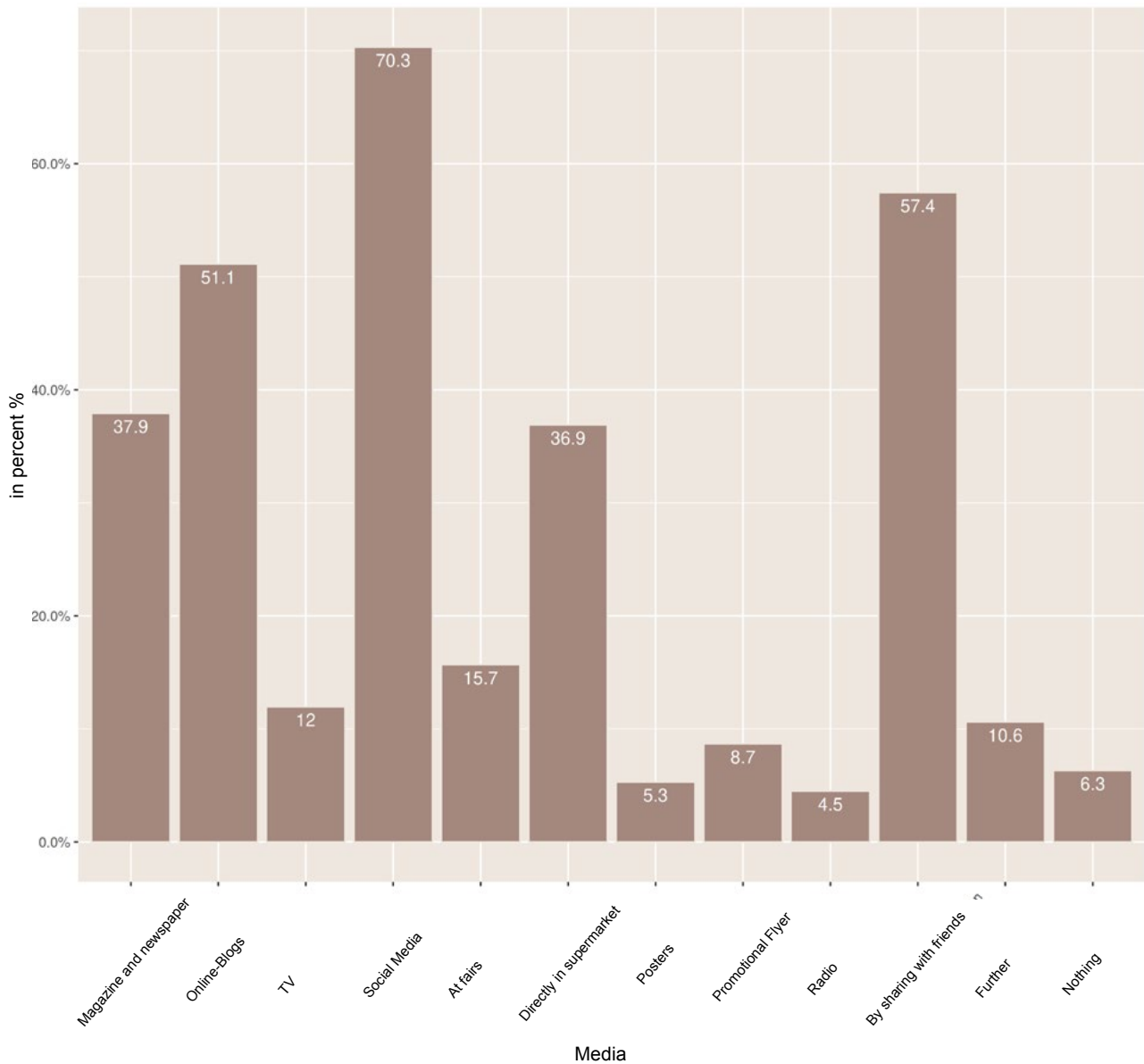


Source: Veganz Nutrition Survey

GERMANY

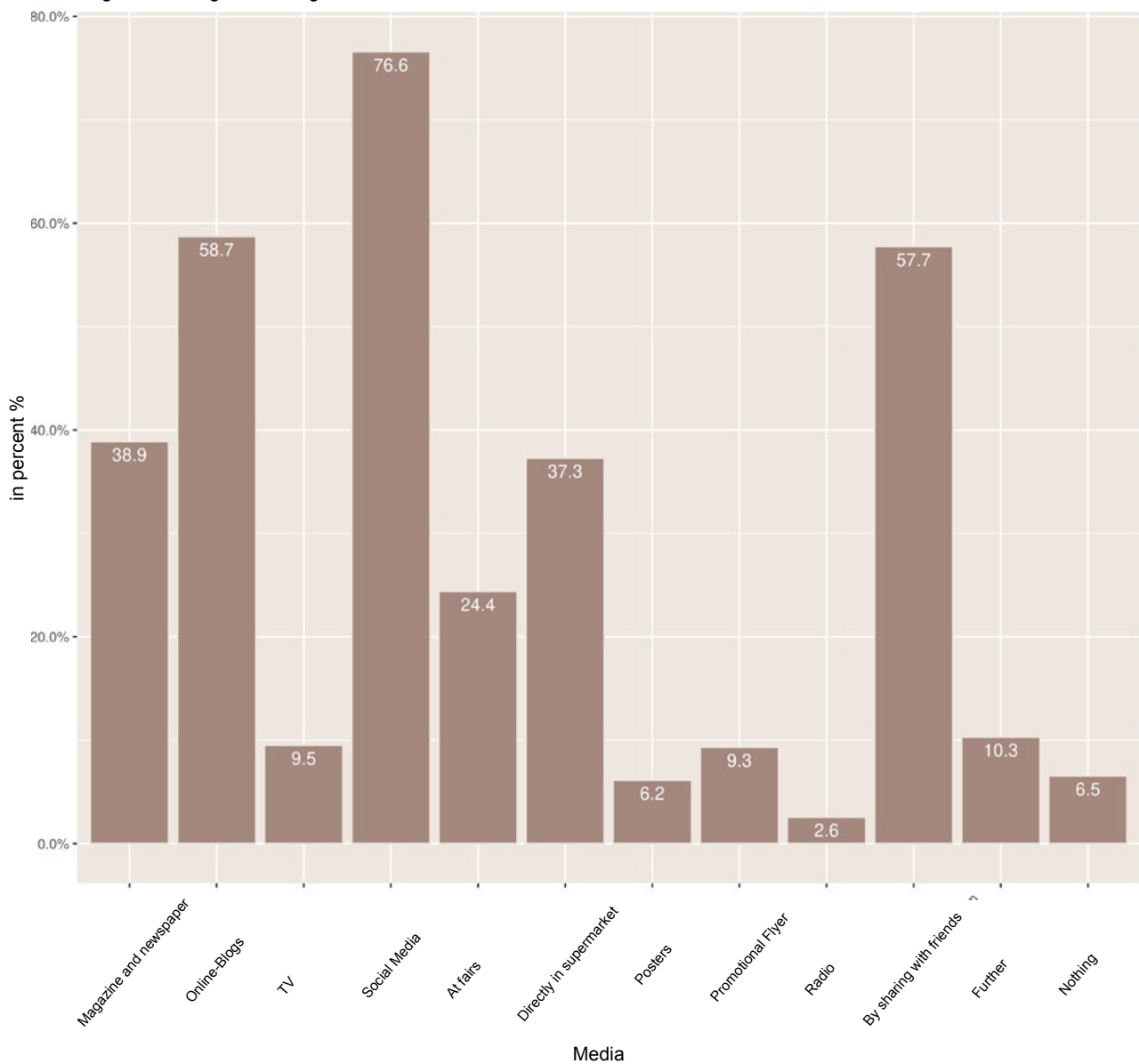
NON-VEGAN

Where do you find information about dietary trends and product innovations?
Veganz asked, germans non-vegans answered.



Source: Veganz Nutrition Survey

Where do you find information about dietary trends and product innovations?
Veganz asked, Germans vegans answered.

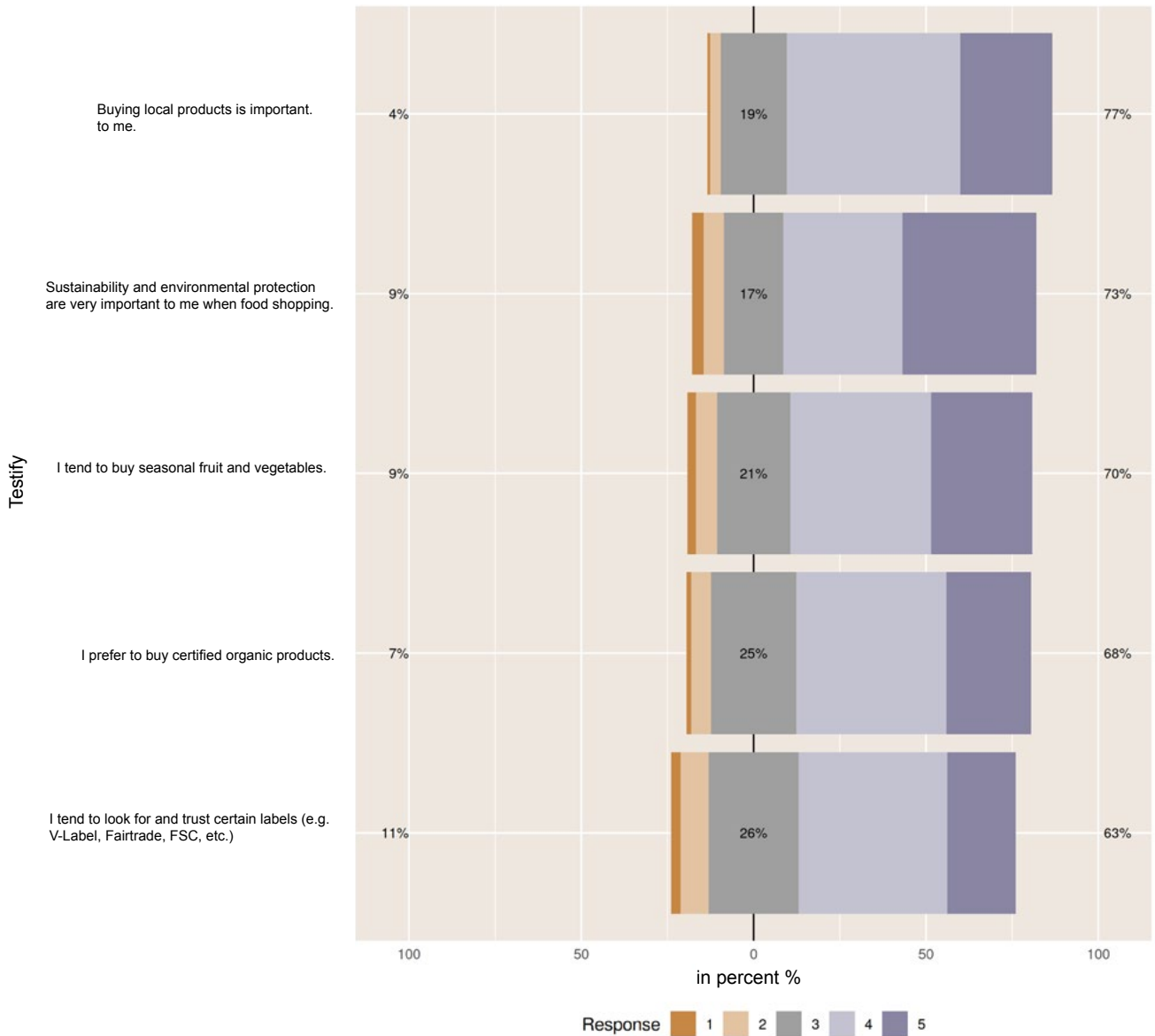


Source: Veganz Nutrition Survey

GERMANY

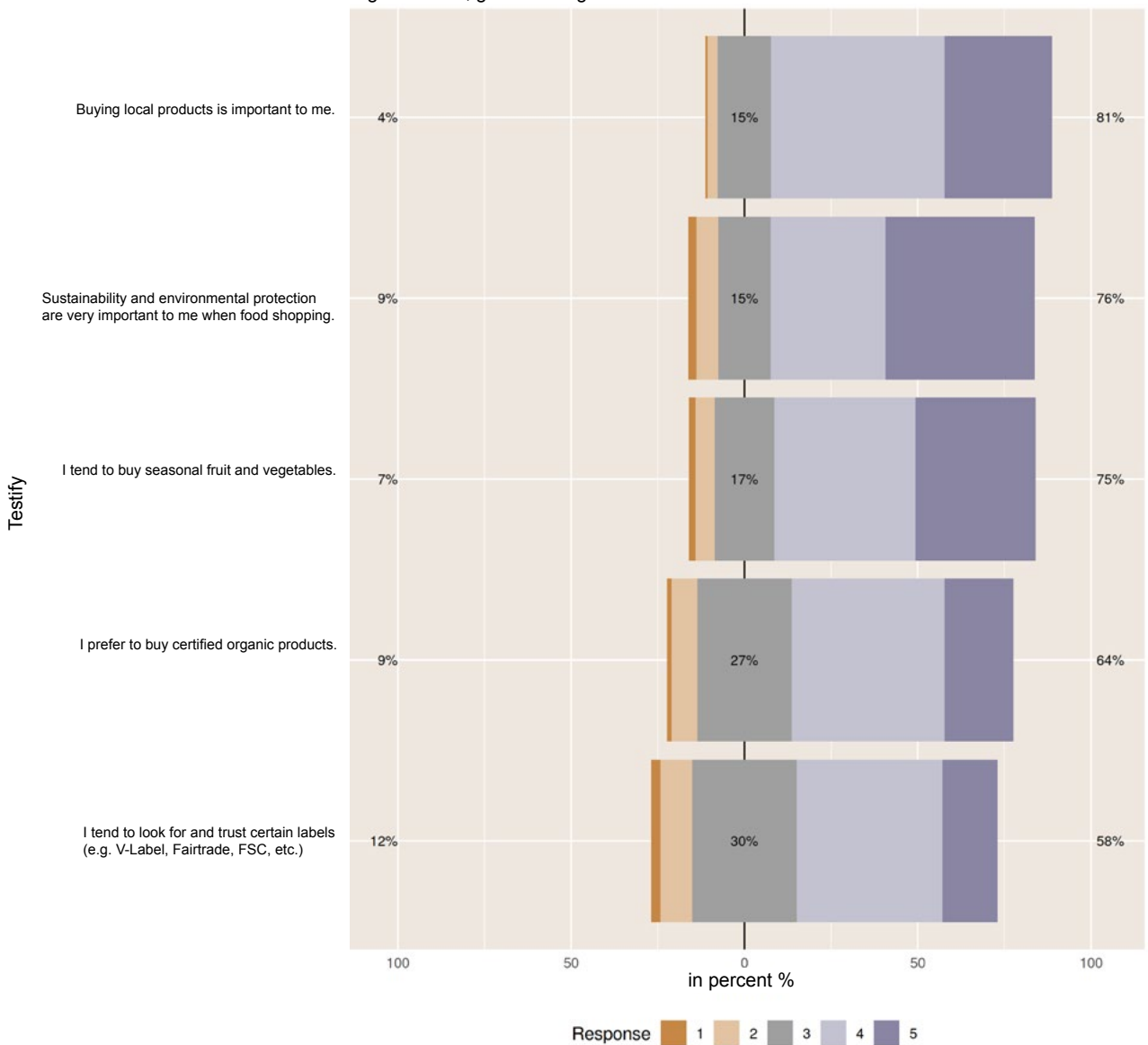
NON-VEGAN

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 Veganz asked, Germans non-vegans answered.



Source: Veganz Nutrition Survey

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 Veganz asked, Germans vegans answered.

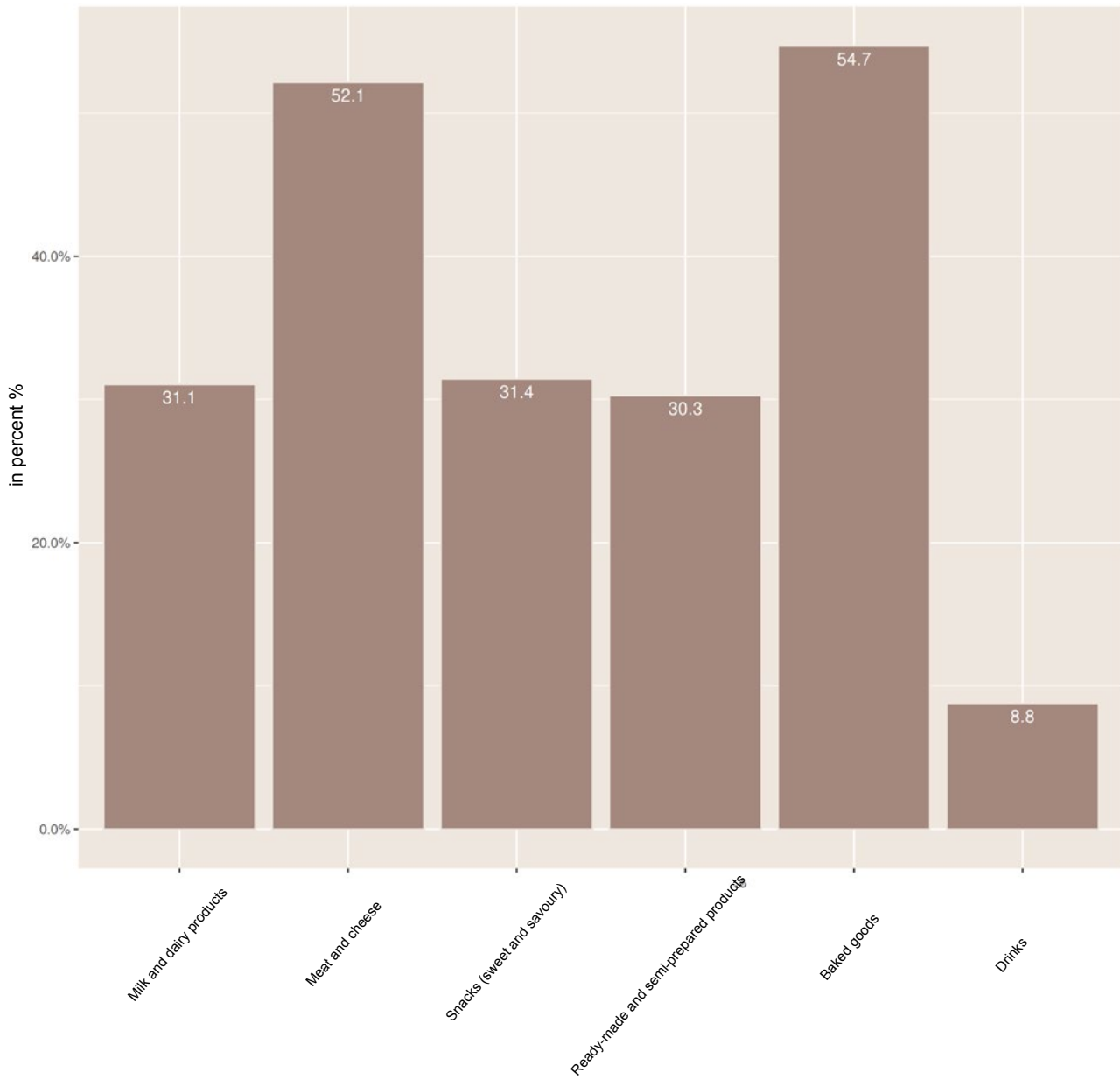


Source: Veganz Nutrition Survey

GERMANY

VEGAN

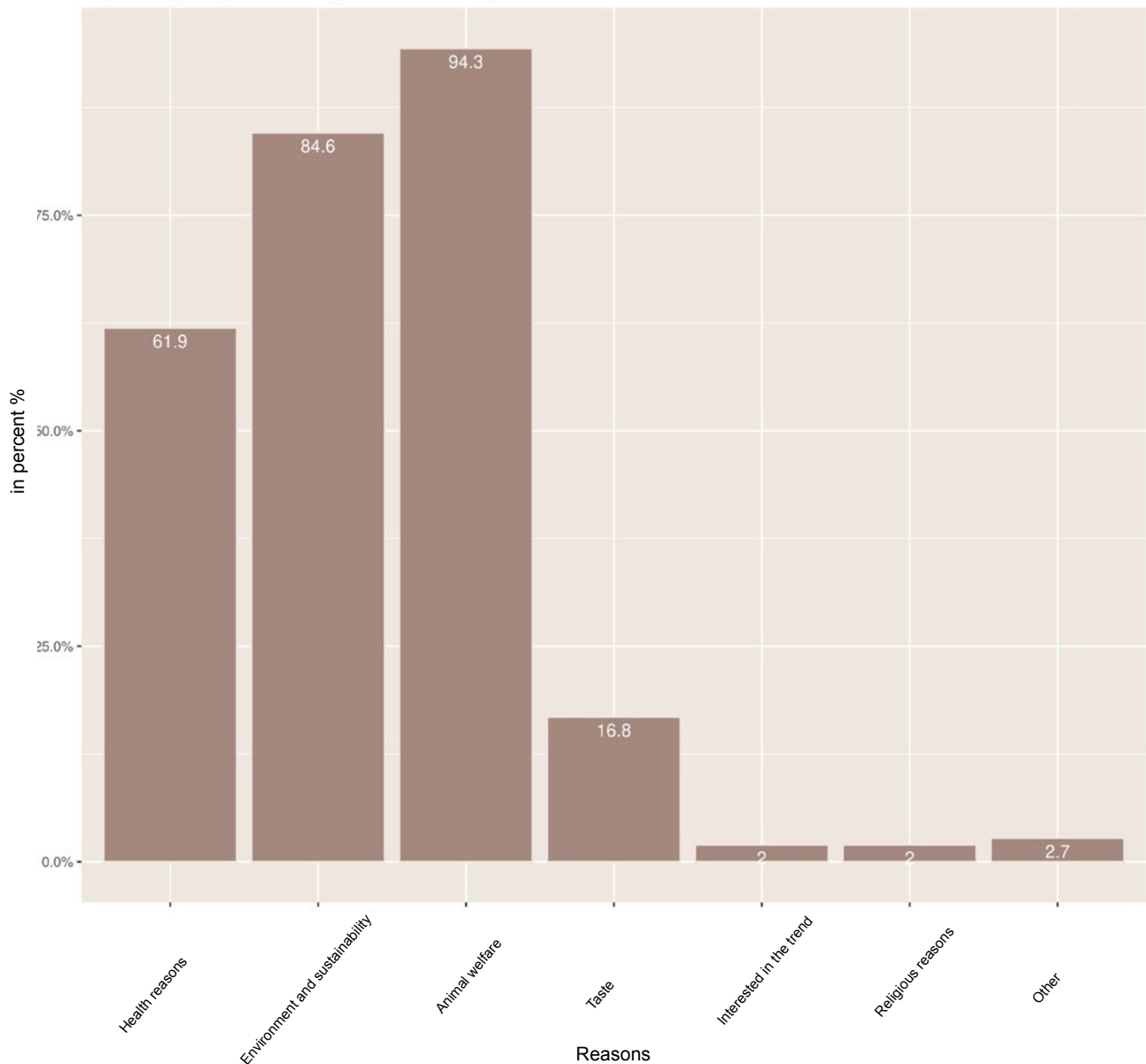
What type of vegan alternatives would you like to see more of?
Veganz asked, Germans vegans answered.



Media

Source: Veganz Nutrition Survey

What are your reasons for eating vegan?
Veganz asked, Germans vegans answered.

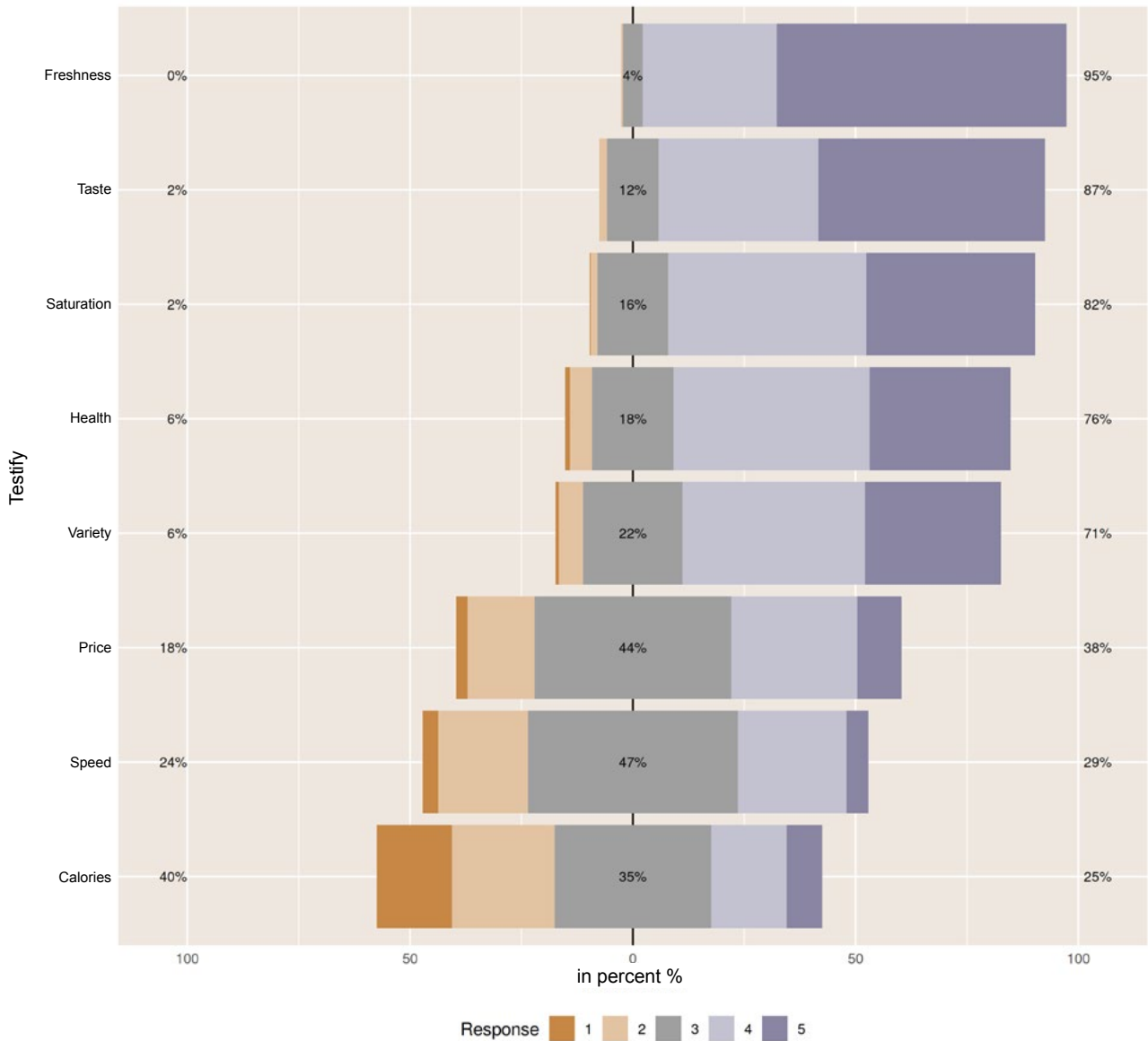


Source: Veganz Nutrition Survey

GERMANY

VEGAN

How important are the following factors to you when it comes to food?
 Scale of 1 "Very important" to 6 "Completely unimportant"
 Veganz asked, Germans vegans answered.



Source: Veganz Nutrition Survey

FRANCE

At 21,3 %, most of the French we asked had a net income of between 1.500 - 2.000 € per month. For the French vegan, their most cited reason for a plant-based lifestyle is animal welfare at 96,3 %. Second place are environment and sustainability with 77,8 %, followed by the health aspect at 51,9 %.

In France, many people like to prepare their own food, so 70 % of French vegans cook for themselves every day - the rest at least three to four times a week. A little less prominent, but leaning in a similar direction, is the case with non-vegans. Just under 2 % cook less than once a week.

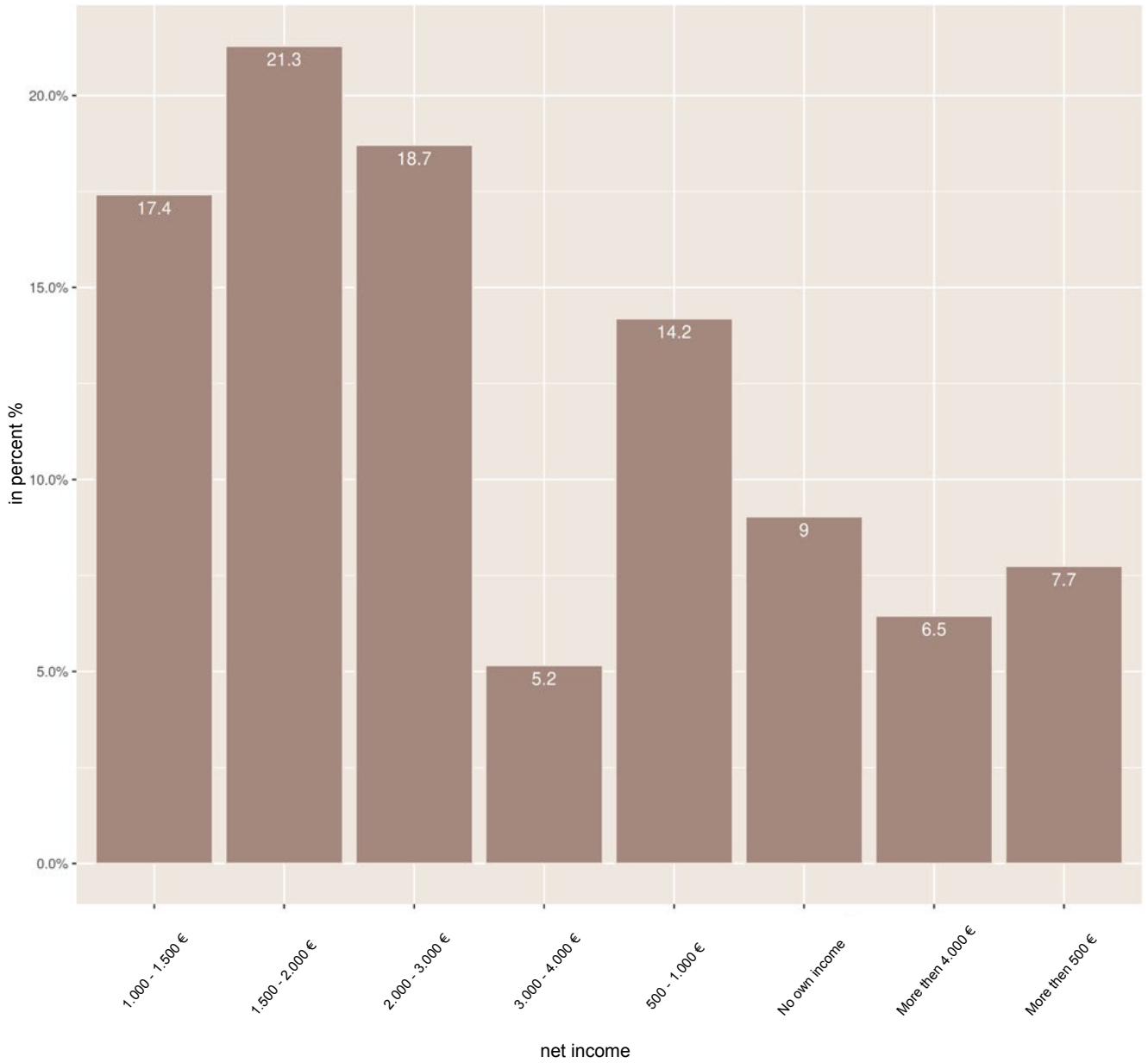
When it comes to nutrition trends and product innovations, whether for vegans or non-vegans, the French surveyed preferred to get their information from either social media or talking with friends. Online blogs were also used for this purpose.

French vegans favour health food stores for purchasing their food, followed by the supermarket, and in third place is online shopping. The other nutritional groups in France prefer the supermarket although nearly 64 % said they buy their food in health food stores.

With regard to vegan foods, French participants pay great attention to product freshness next to quality and flavour. In addition, 63 % of French vegans feel there is a lack of variety in baked goods and more than half say they would like to see more cured meat and cheese alternatives.

In general, French vegans tend to pay more attention to factors such as environmental protection, regionality and seasonality when shopping. Scepticism is the main reason why non-vegans in France are reluctant to buy organic products, especially those with quality seals and organic certifications.

What is your net monthly income?
Veganz asked, french answered.

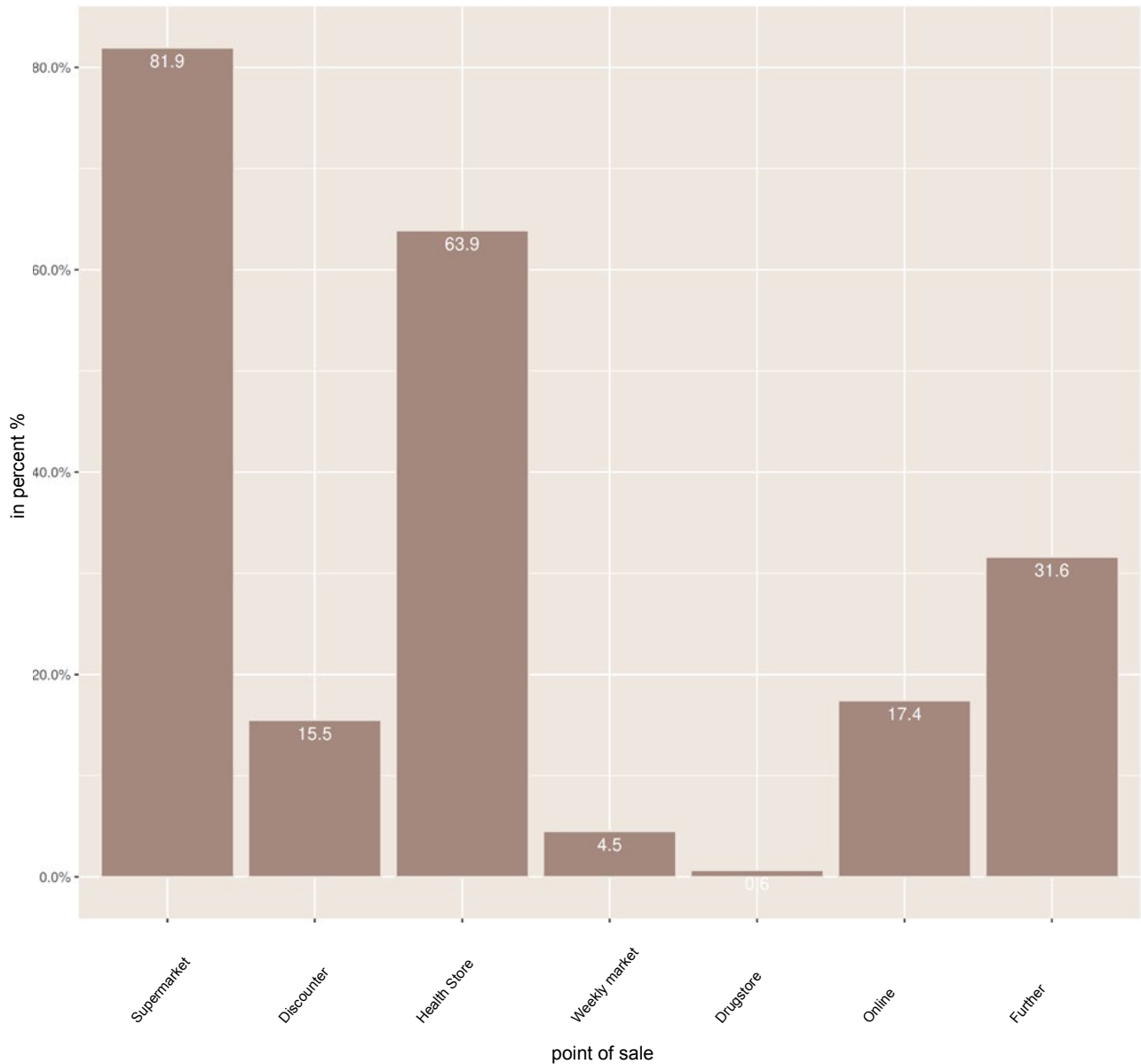


Source: Veganz Nutrition Survey

FRANCE

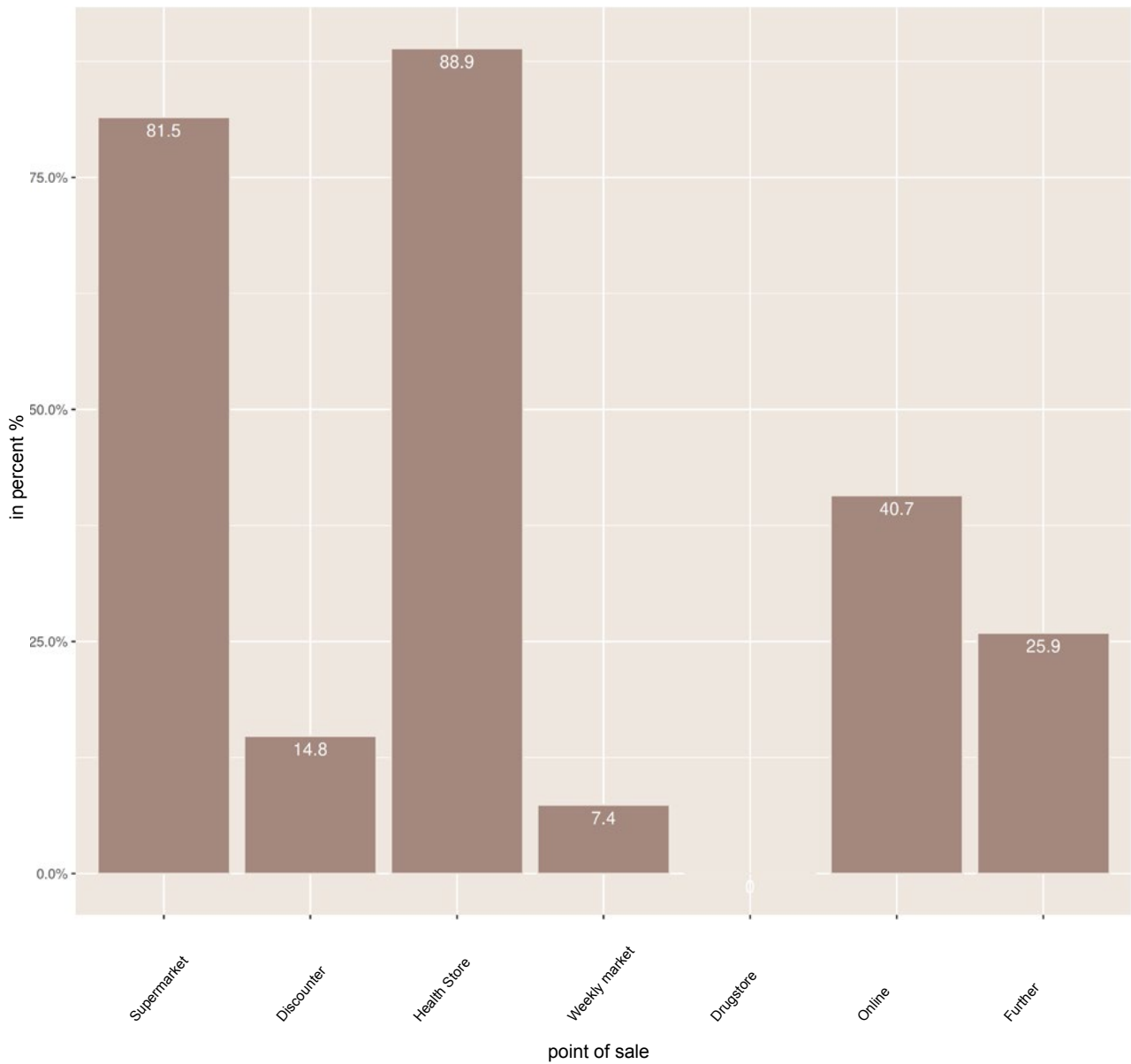
NON-VEGAN

Where do you buy food?
Veganz asked, french non-vegans answered.



Source: Veganz Nutrition Survey

Where do you buy food?
Veganz asked, french vegans answered.

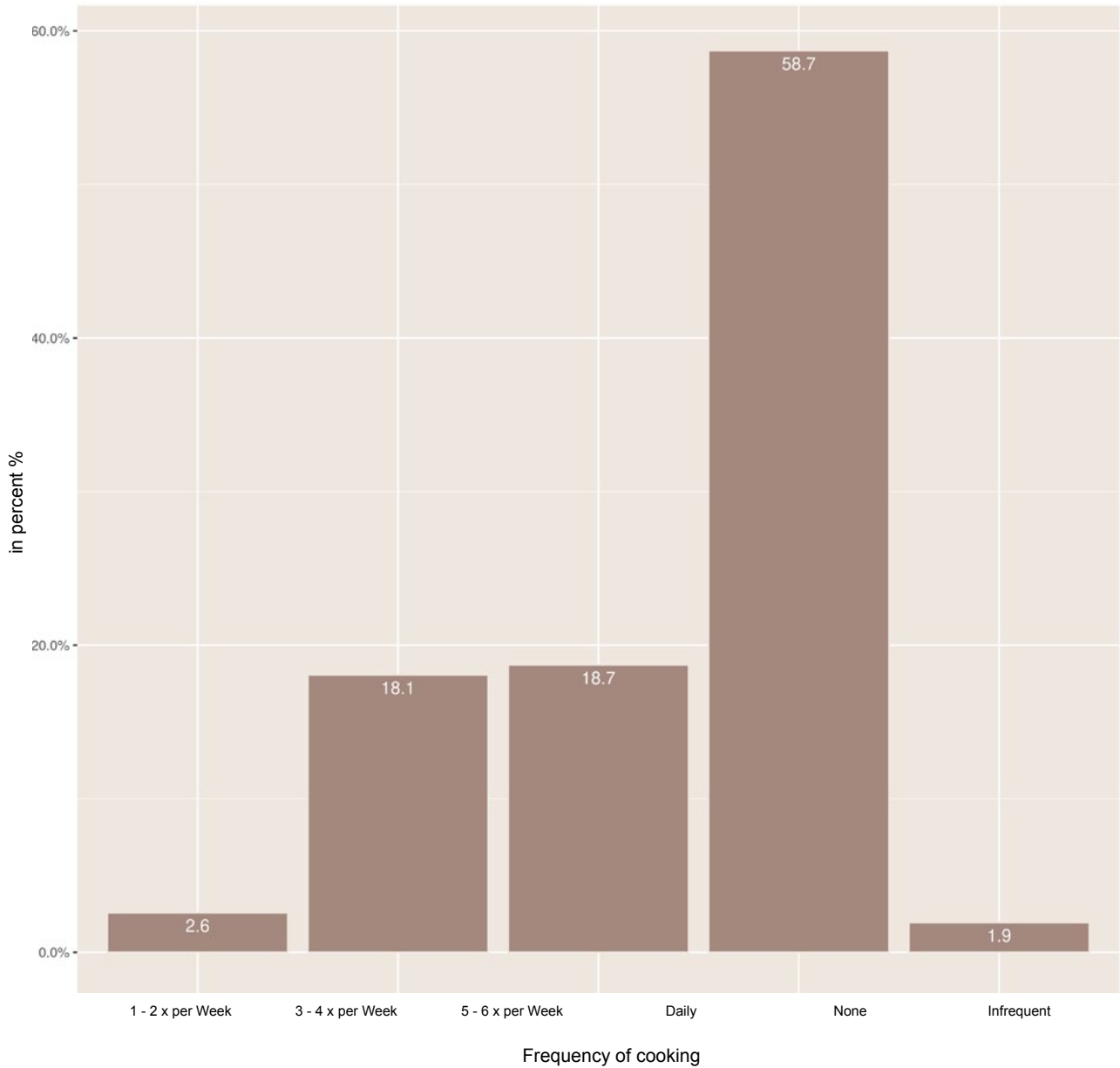


Source: Veganz Nutrition Survey

FRANCE

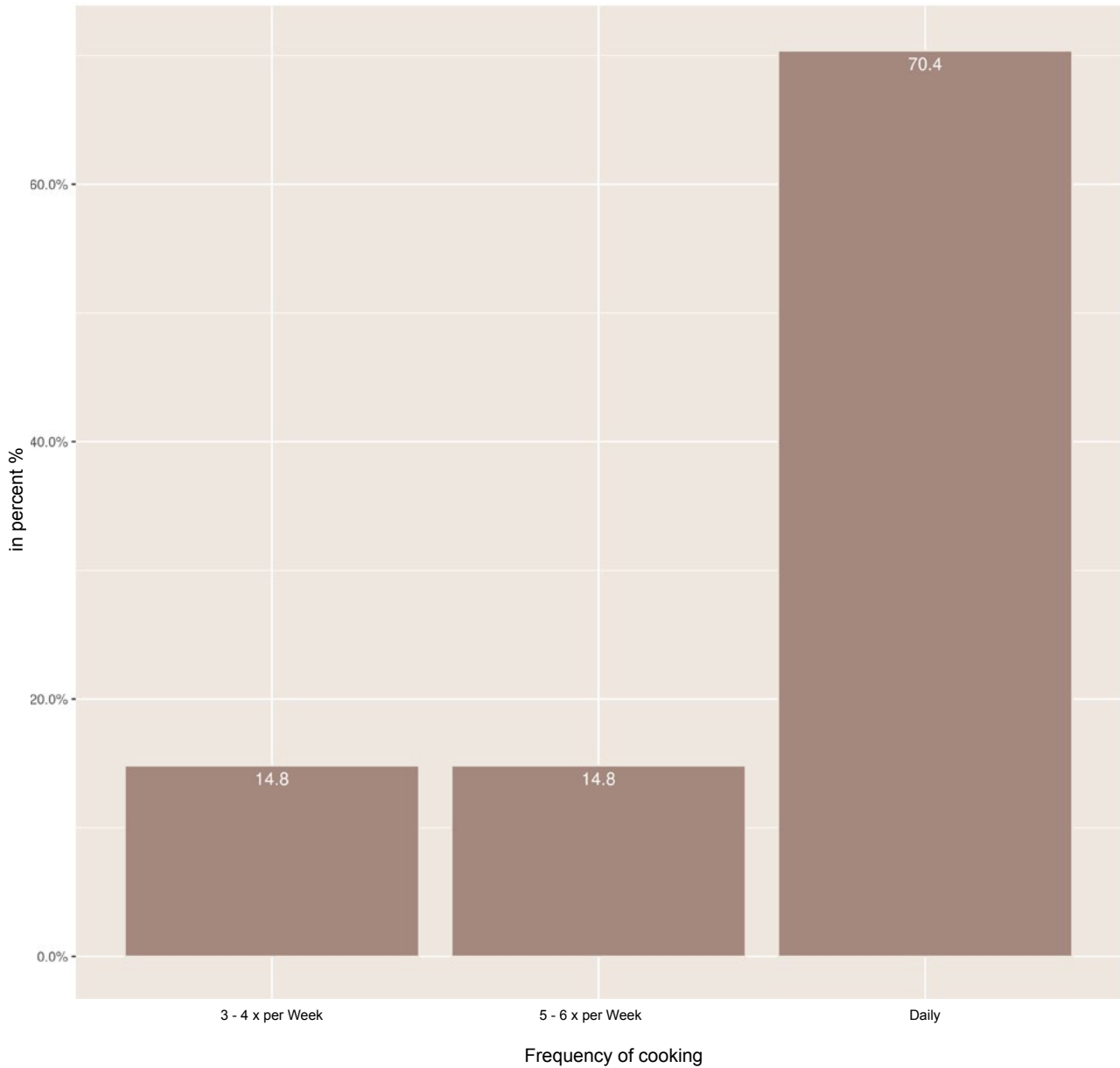
NON-VEGAN

How often do you cook?
VeganZ asked, french non-vegans answered.



Source: VeganZ Nutrition Survey

How often do you cook?
Veganz asked, french vegans answered.

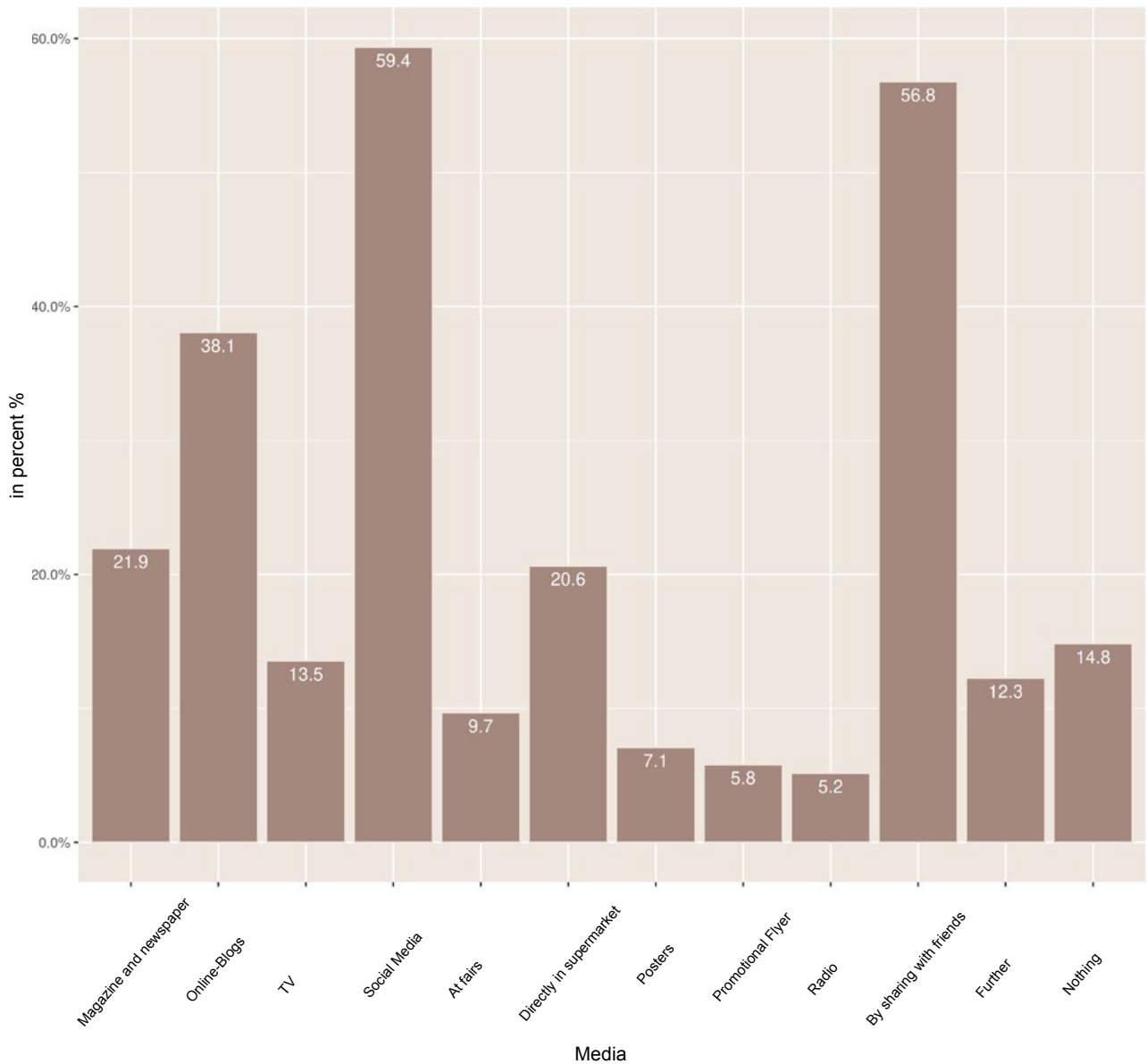


Source: Veganz Nutrition Survey

FRANCE

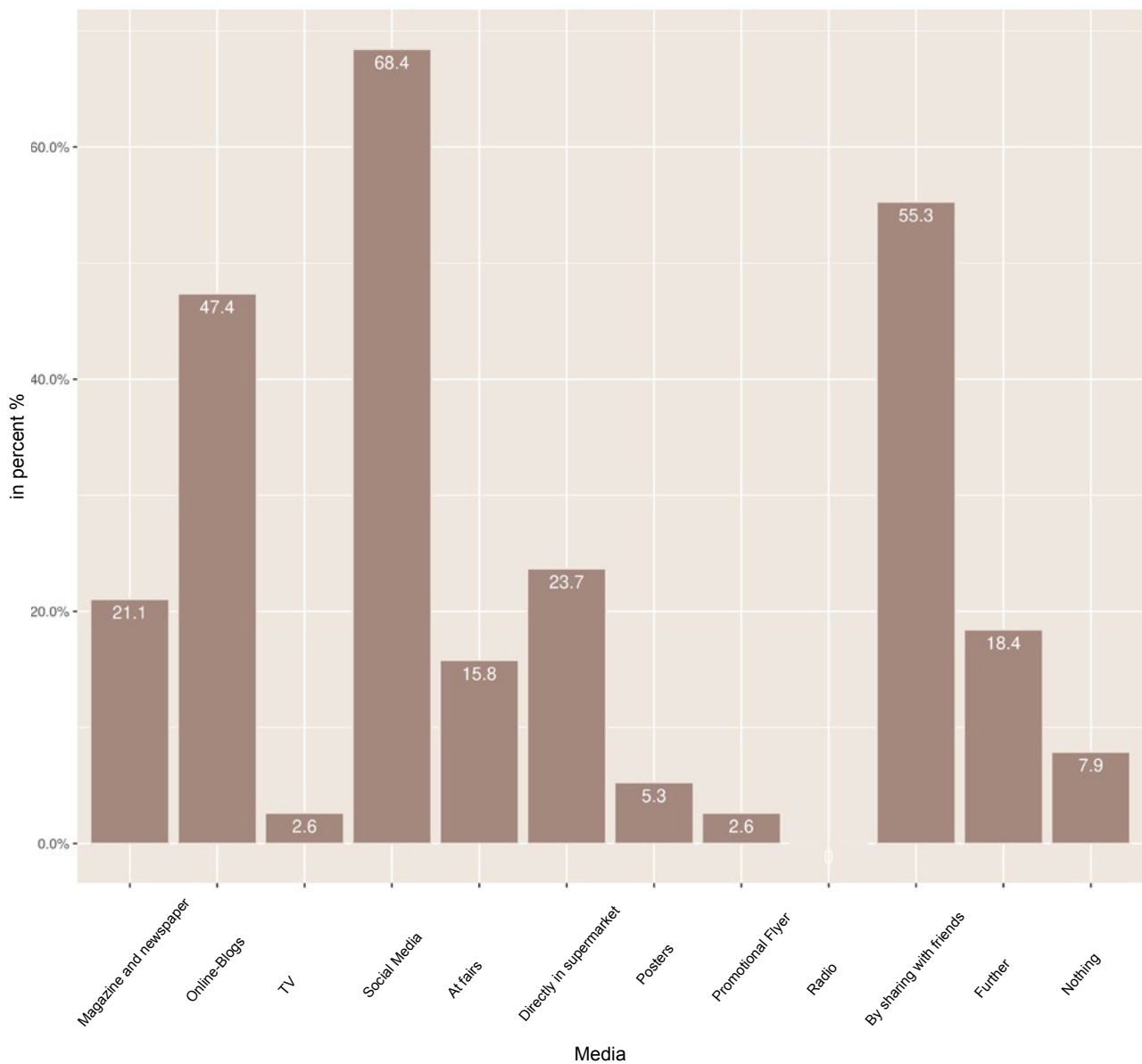
NON-VEGAN

Where do you find information about dietary trends and product innovations?
VeganZ asked, french non-vegans answered.



Source: VeganZ Nutrition Survey

Where do you find information about dietary trends and product innovations?
Veganz asked, french vegans answered.

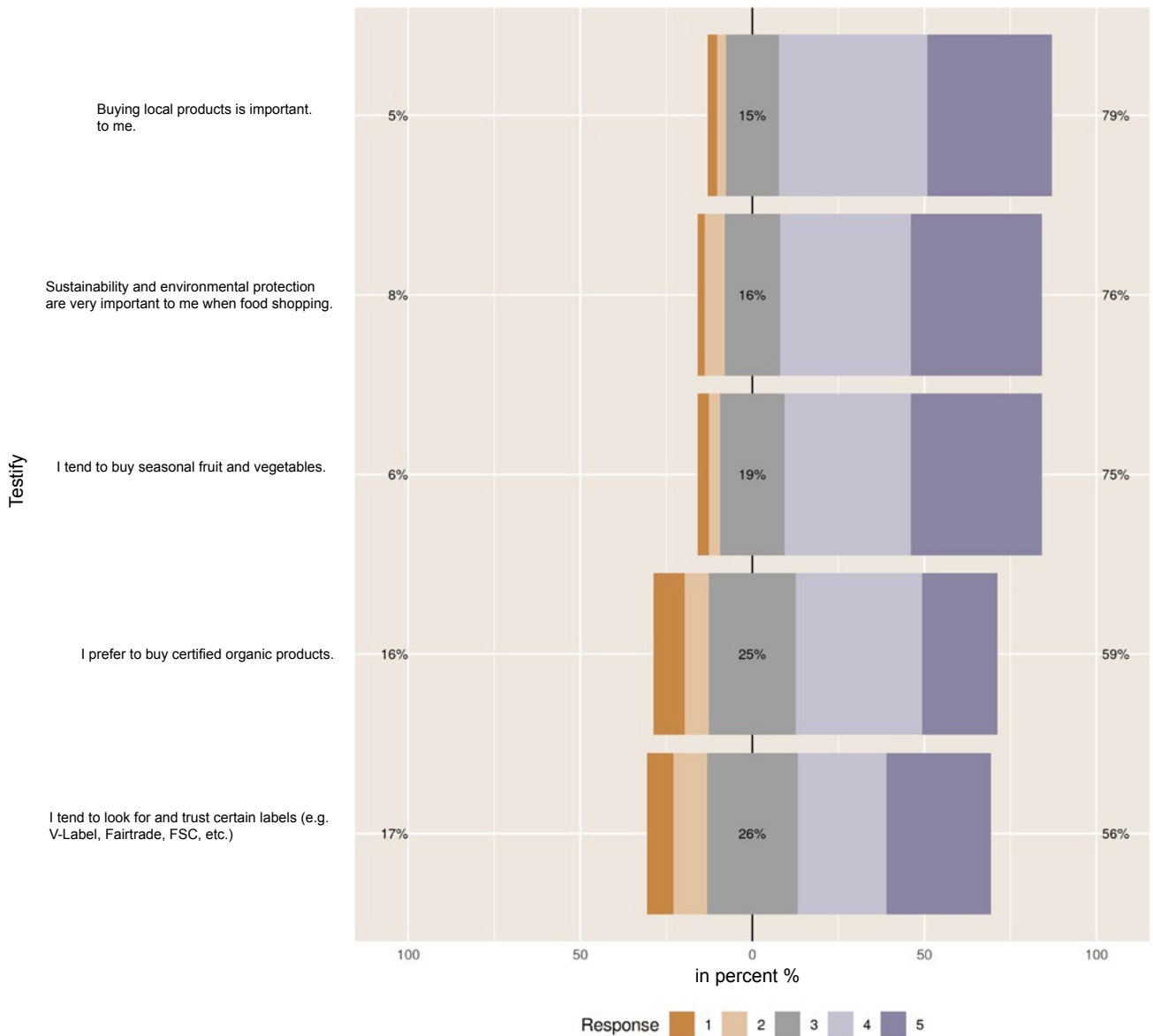


Source: Veganz Nutrition Survey

FRANCE

NON-VEGAN

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 Veganz asked, french non-vegans answered.

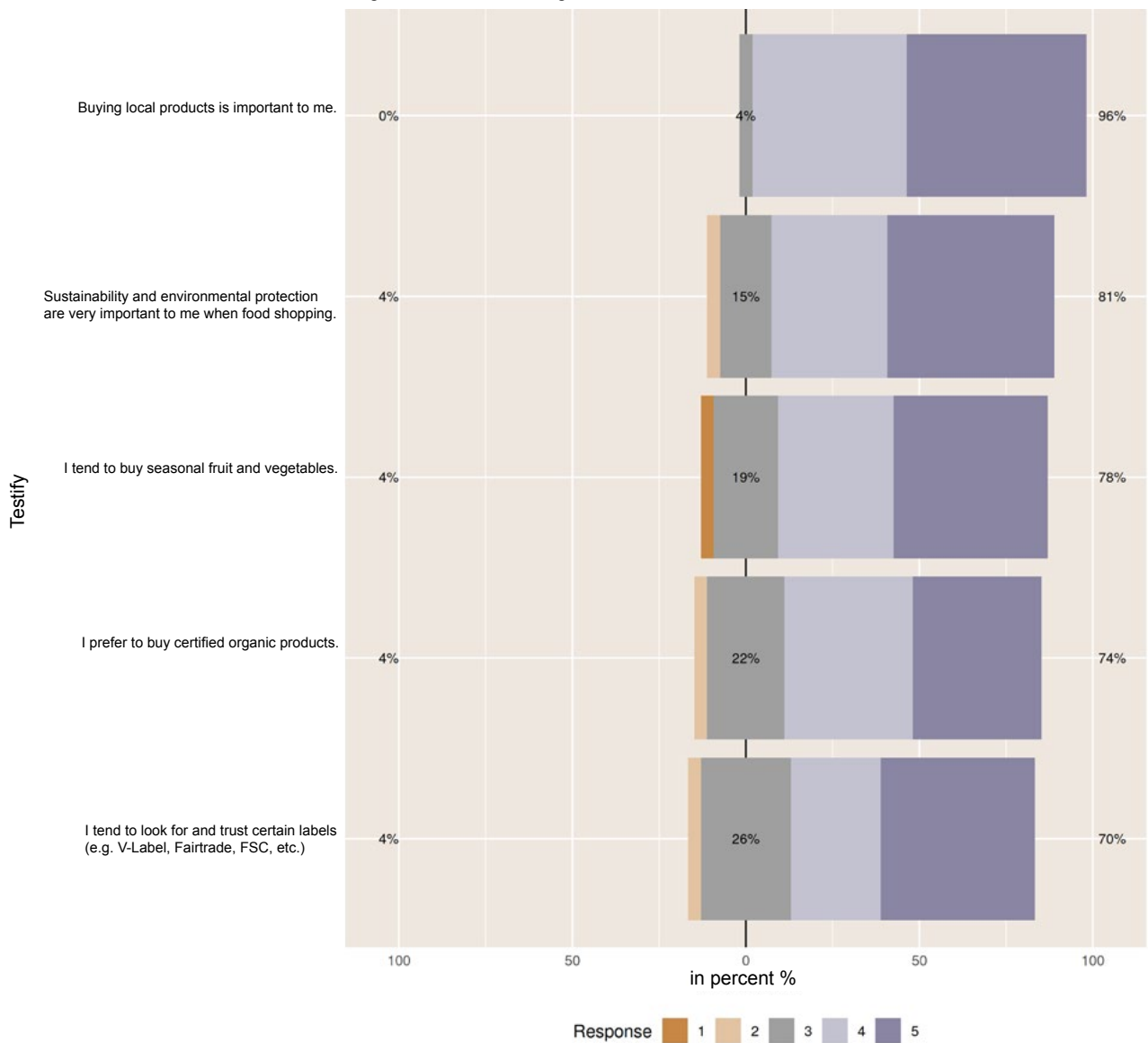


Source: Veganz Nutrition Survey

To what extent do the following statements describe you?

Scale from 1 "Totally agree" to 6 "Totally disagree"

Veganz asked, french vegans answered.

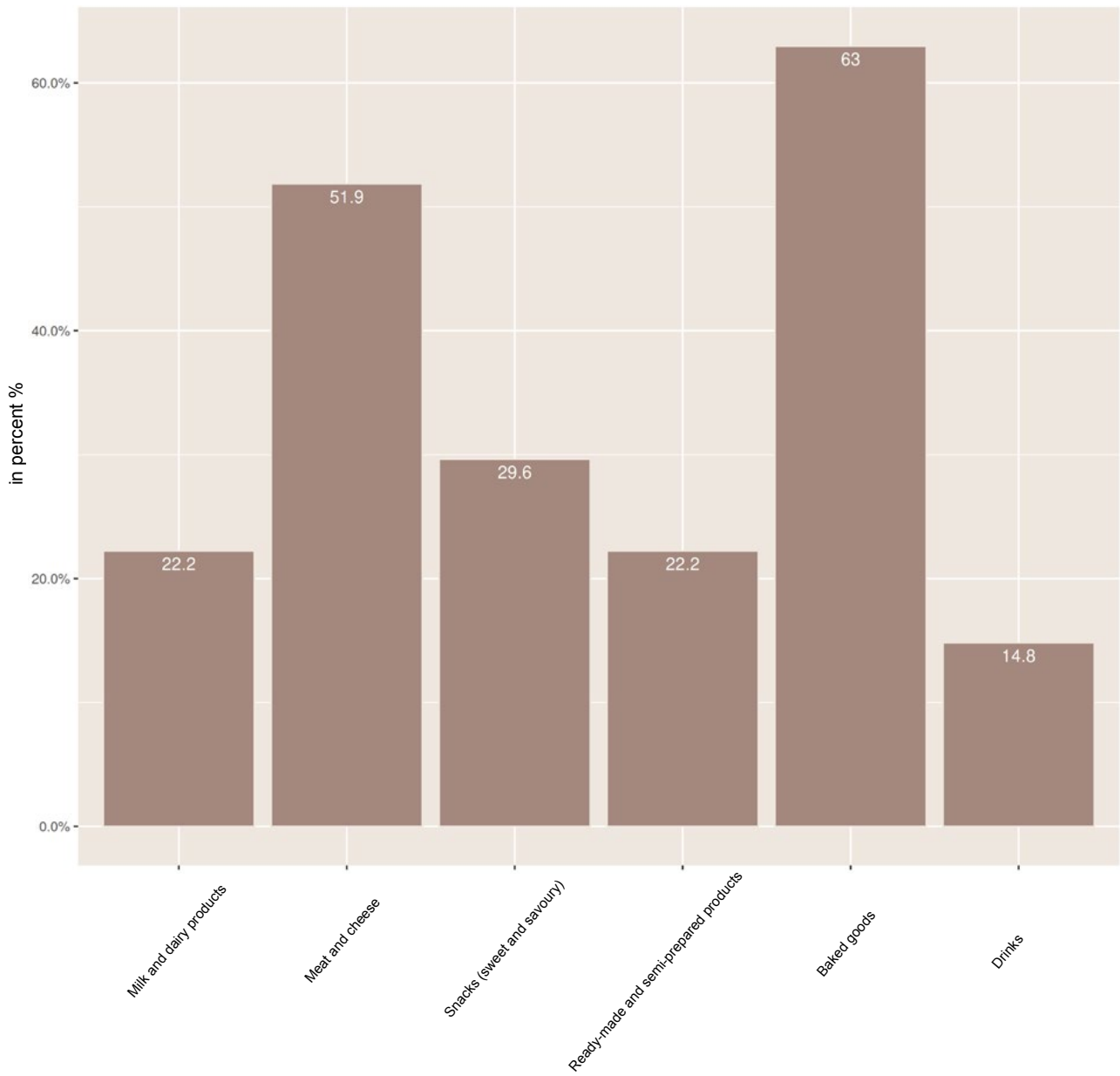


Source: Veganz Nutrition Survey

FRANCE

VEGAN

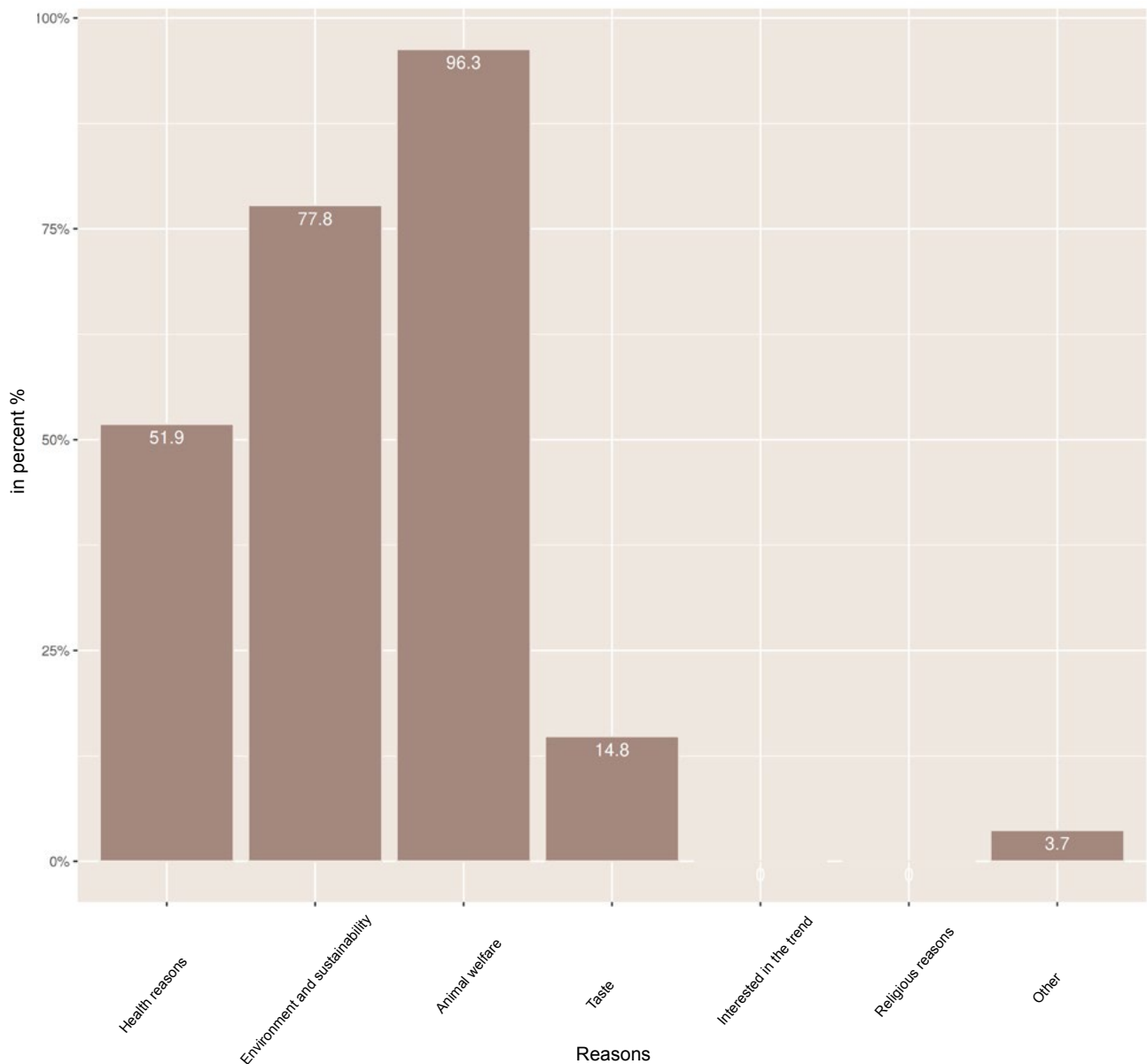
What type of vegan alternatives would you like to see more of?
Veganz asked, french vegans answered.



Media

Source: Veganz Nutrition Survey

What are your reasons for eating vegan?
Veganz asked, french vegans answered.

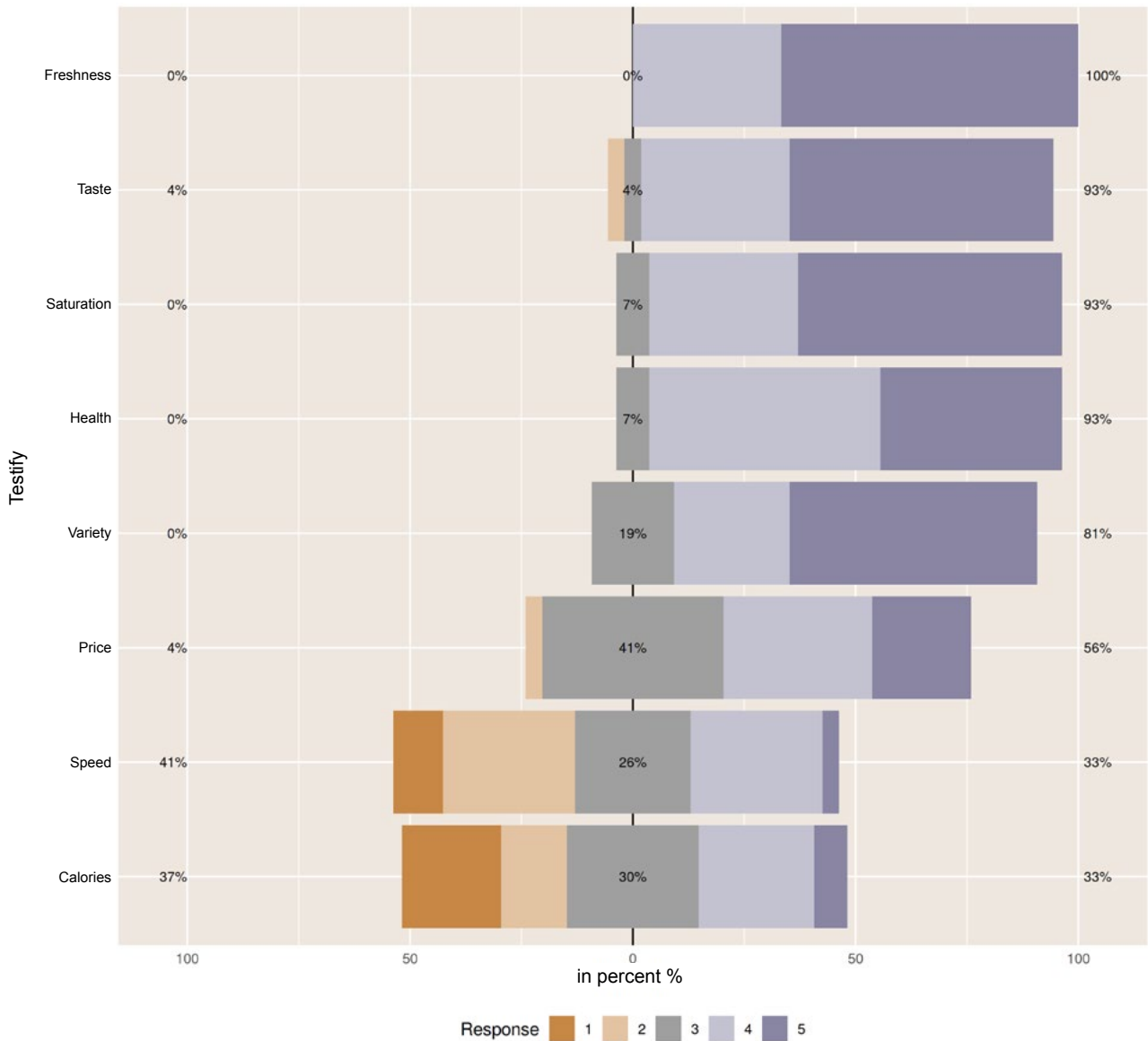


Source: Veganz Nutrition Survey

FRANCE

VEGAN

How important are the following factors to you when it comes to food?
 Scale of 1 "Very important" to 6 "Completely unimportant"
 Veganz asked, french vegans answered.



Source: Veganz Nutrition Survey

GREECE

Net income distribution in Greece is focused mainly on a monthly income of between 500 - 1.500 €.

The reason for a plant-based lifestyle among Greek vegans is animal welfare at 86,4 %, 68,2 % environment and 59,1 % individual health. A further 22,7 % of Greek vegans say flavour is the reason they are vegan.

Almost a third of Greek vegans cook for themselves every day while another third say they cook their own food between 5 and 6 times a week. Nevertheless, 9 % do their own cooking less than once a week and Greek non-vegans slightly less: Here the frequency is distributed relatively evenly to about three to seven times a week.

85 % of Greek vegans like to get their information on the latest food trends from online blogs. After that it's social media platforms at 70 % and talking with friends at 60 %. 40 % say they get their information straight from the supermarket. In contrast, all other nutritional groups prefer social media to online blogs. The exchange with friends is roughly equivalent to direct information from the supermarket and almost 27 % use advertising leaflets to find out about new products in the foodstuffs industry.

A further difference is in their choice of shopping outlets. Almost all Greek participants shop at the

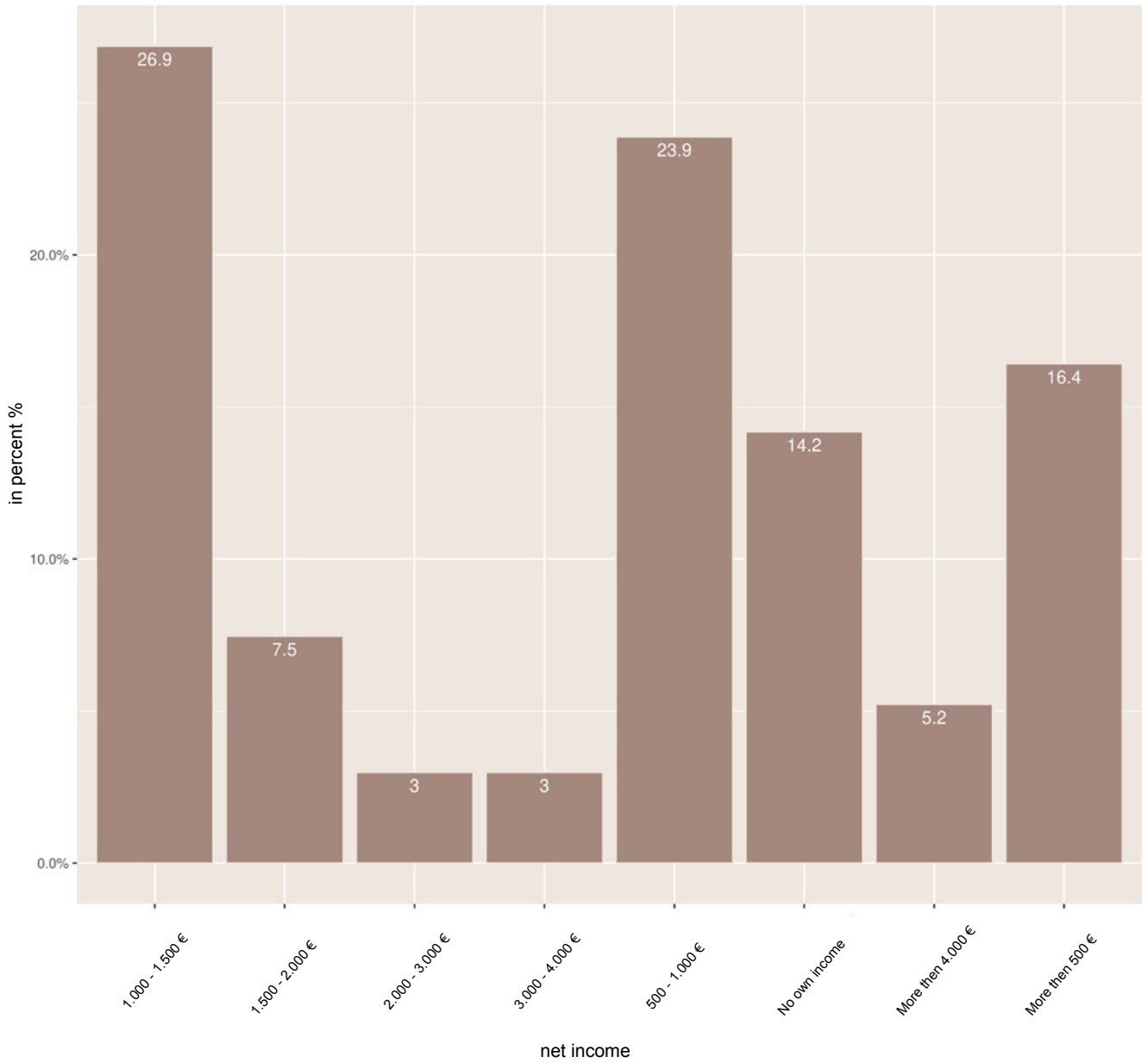
supermarket. In addition, 43 % of non-vegans say they buy their food at health food stores. Among Greek vegans, the figure is 77 %. They also like to use the option of online food shopping.

Next to product quality and ingredients, food flavour and freshness is important for Greek vegans. Opinions begin to differ when it comes to organic certifications, innovations and regionality, whereas brand recognition has very little influence on purchase choice.

In the sweets & snacks category, 86.4 % of respondents say there is a lack of vegan alternatives in Greece. Similarly, half of all Greek vegans would like a wider choice of cured meat and cheese substitutes as well as plant-based baked goods, ready-made and semi-ready-made meals. And a mere 5 % criticise the range of vegan milk alternatives.

With regard to general purchasing behaviour, Greek vegans said that they place great value on sustainability and environmental protection. Among other nutrition groups, the figure is only 72 %. In general, certified organic products as well as seals and labels are given less weight. Regionality and seasonality play a more important role for all food groups.

What is your net monthly income?
Veganz asked, greek answered.

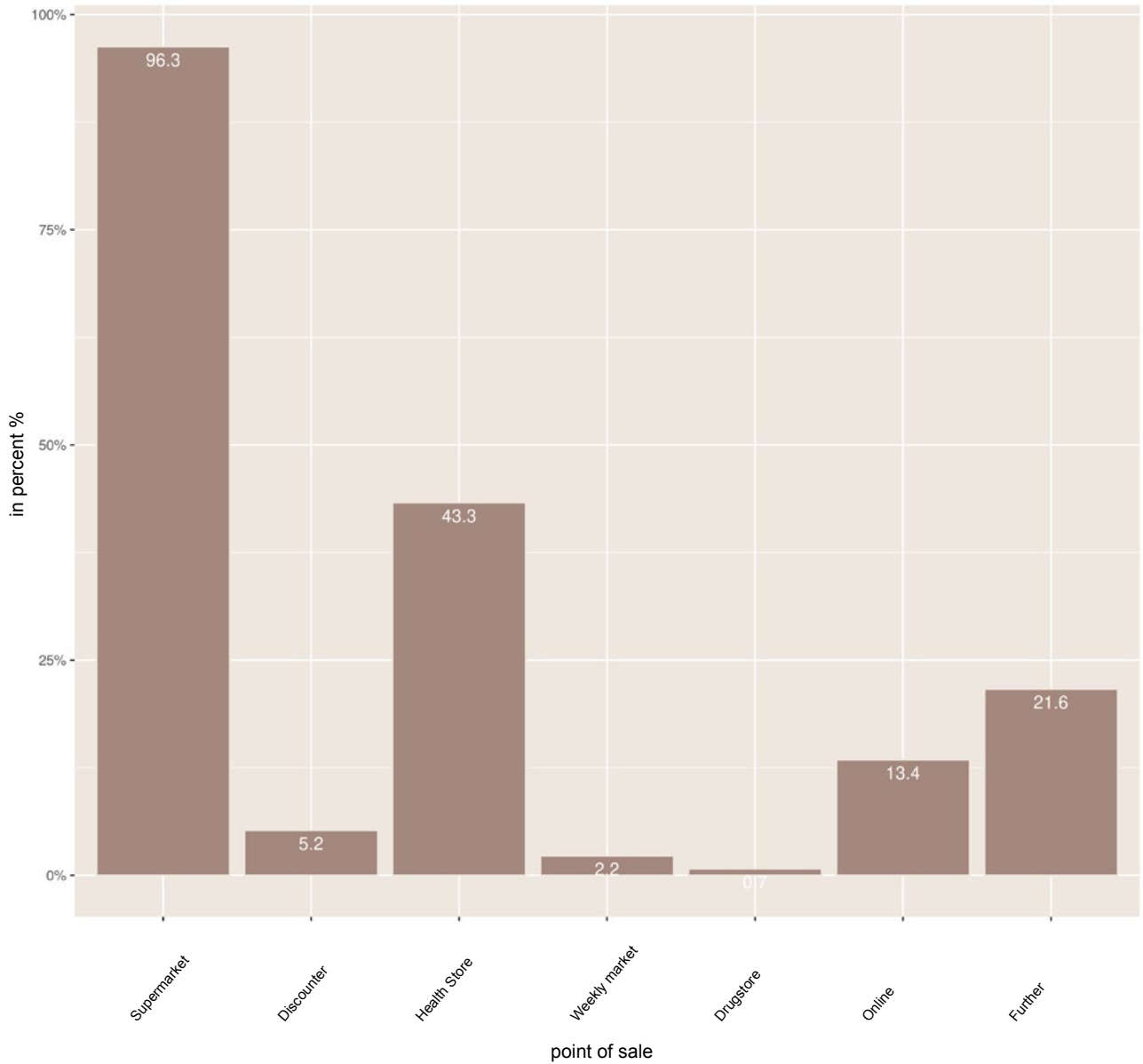


Source: Veganz Nutrition Survey

GREECE

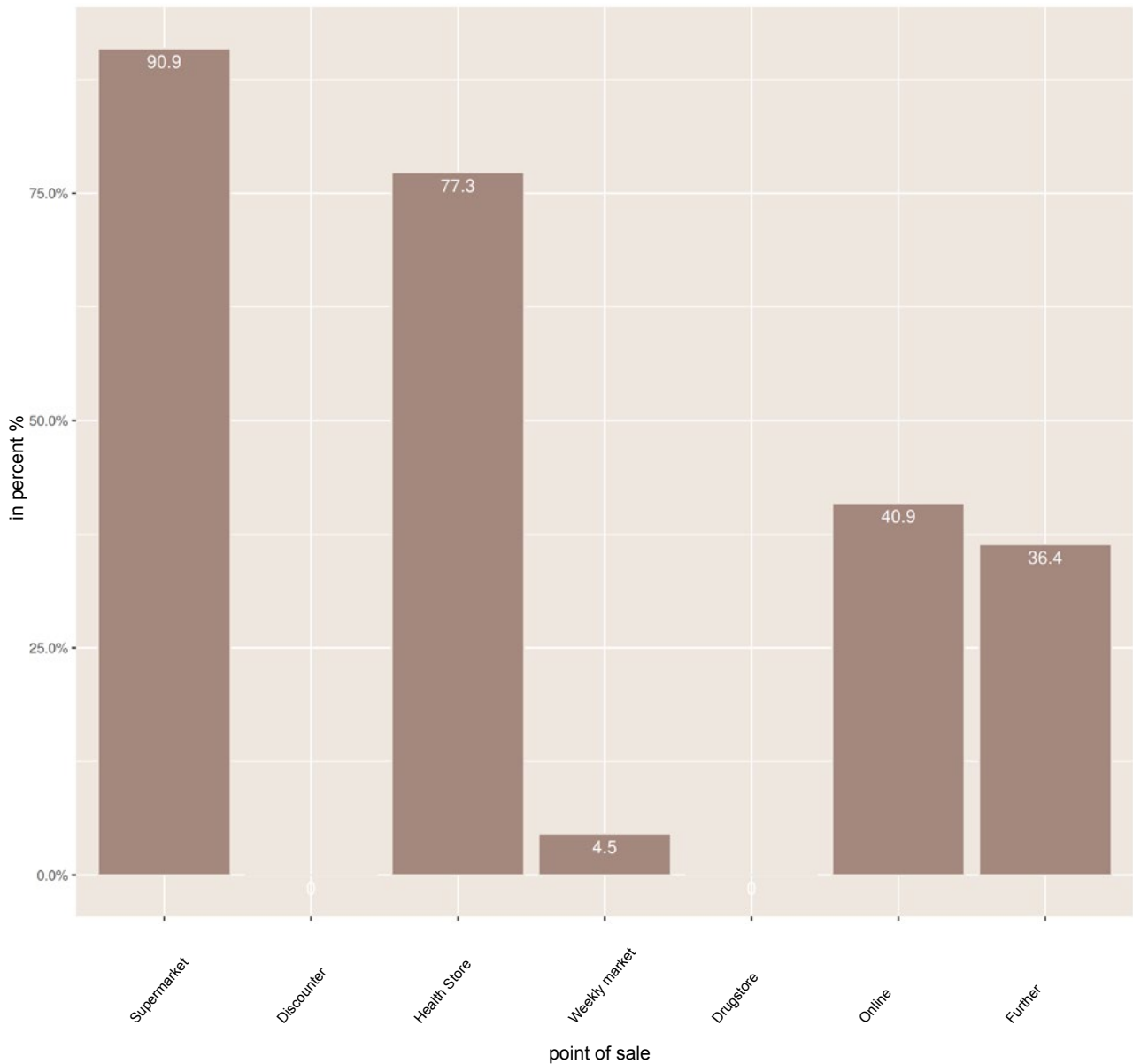
NON-VEGAN

Where do you buy food?
Veganz asked, greek non-vegans answered.



Source: Veganz Nutrition Survey

Where do you buy food?
Veganz asked, greek vegans answered.

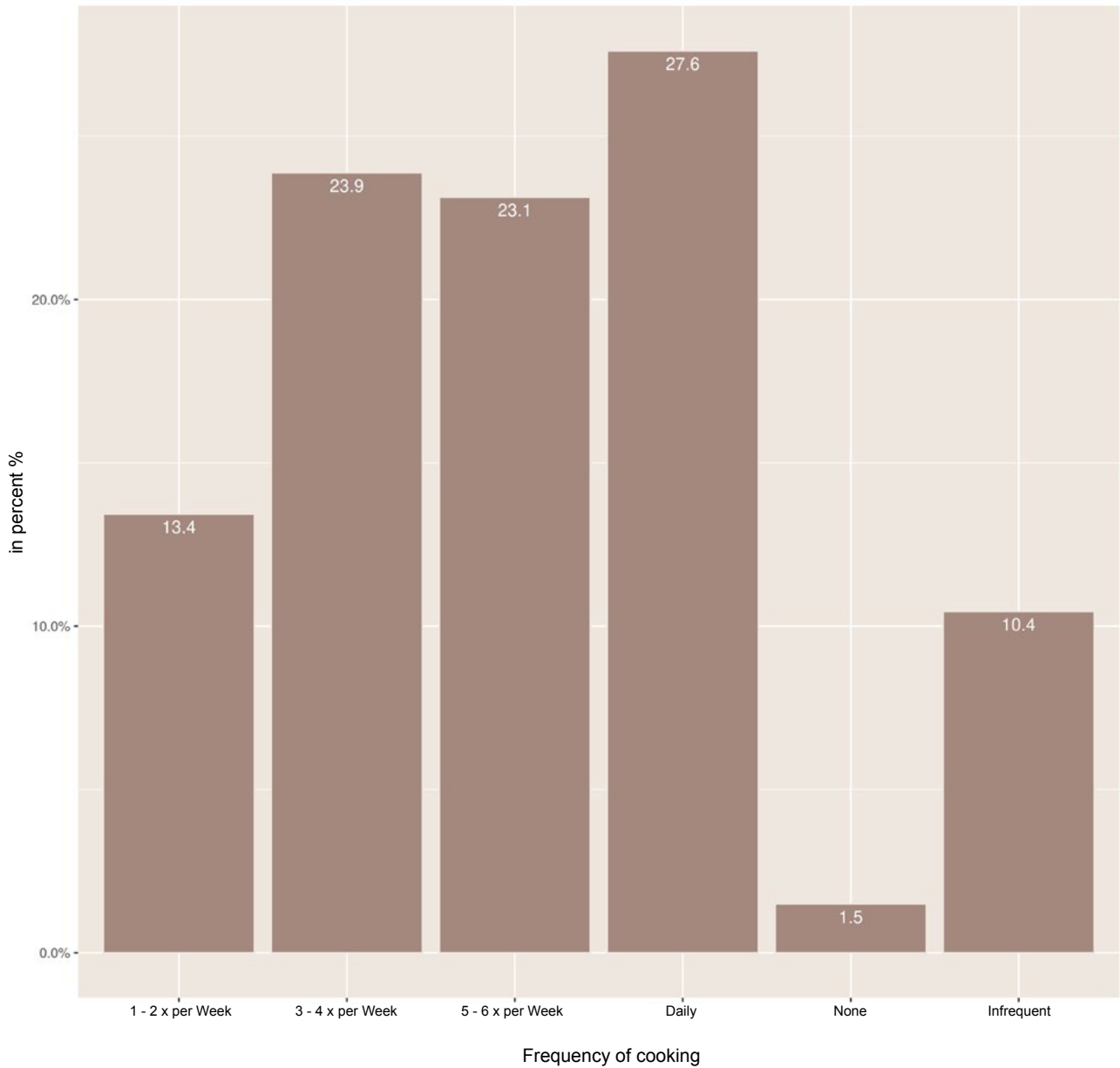


Source: Veganz Nutrition Survey

GREECE

NON-VEGAN

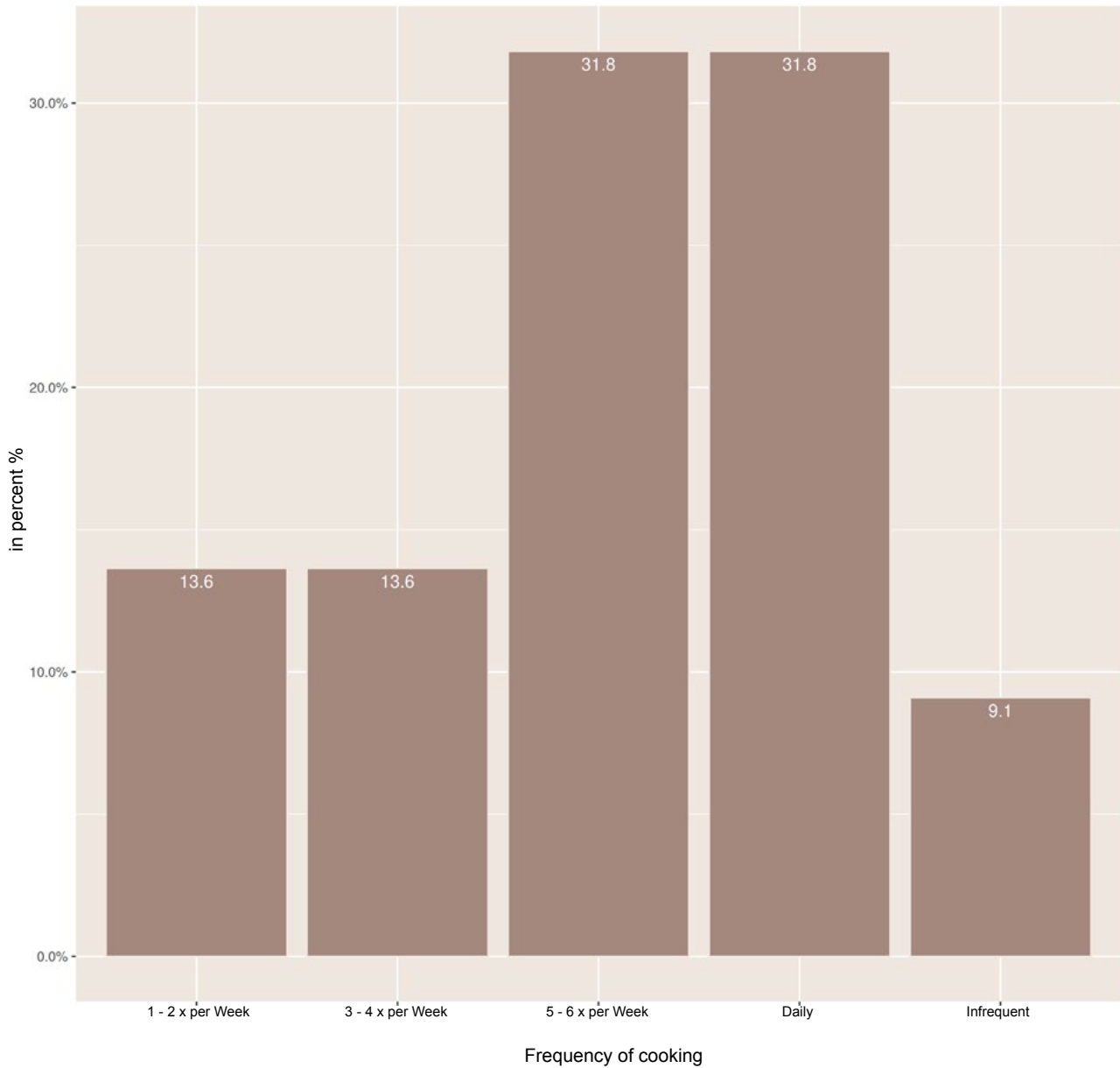
How often do you cook?
VeganZ asked, greek non-vegans answered.



Source: VeganZ Nutrition Survey

How often do you cook?

Veganz asked, greek vegans answered.

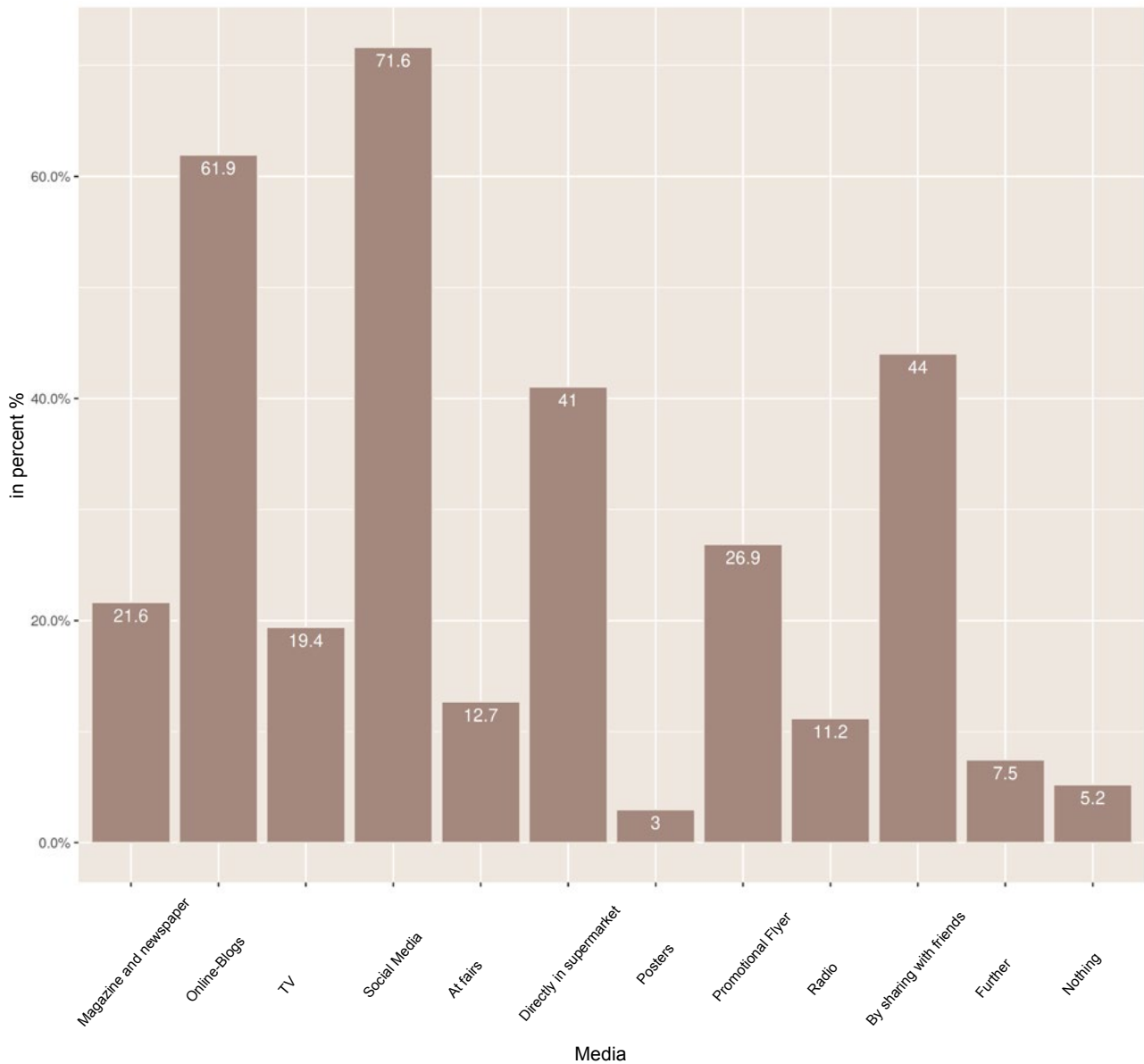


Source: Veganz Nutrition Survey

GREECE

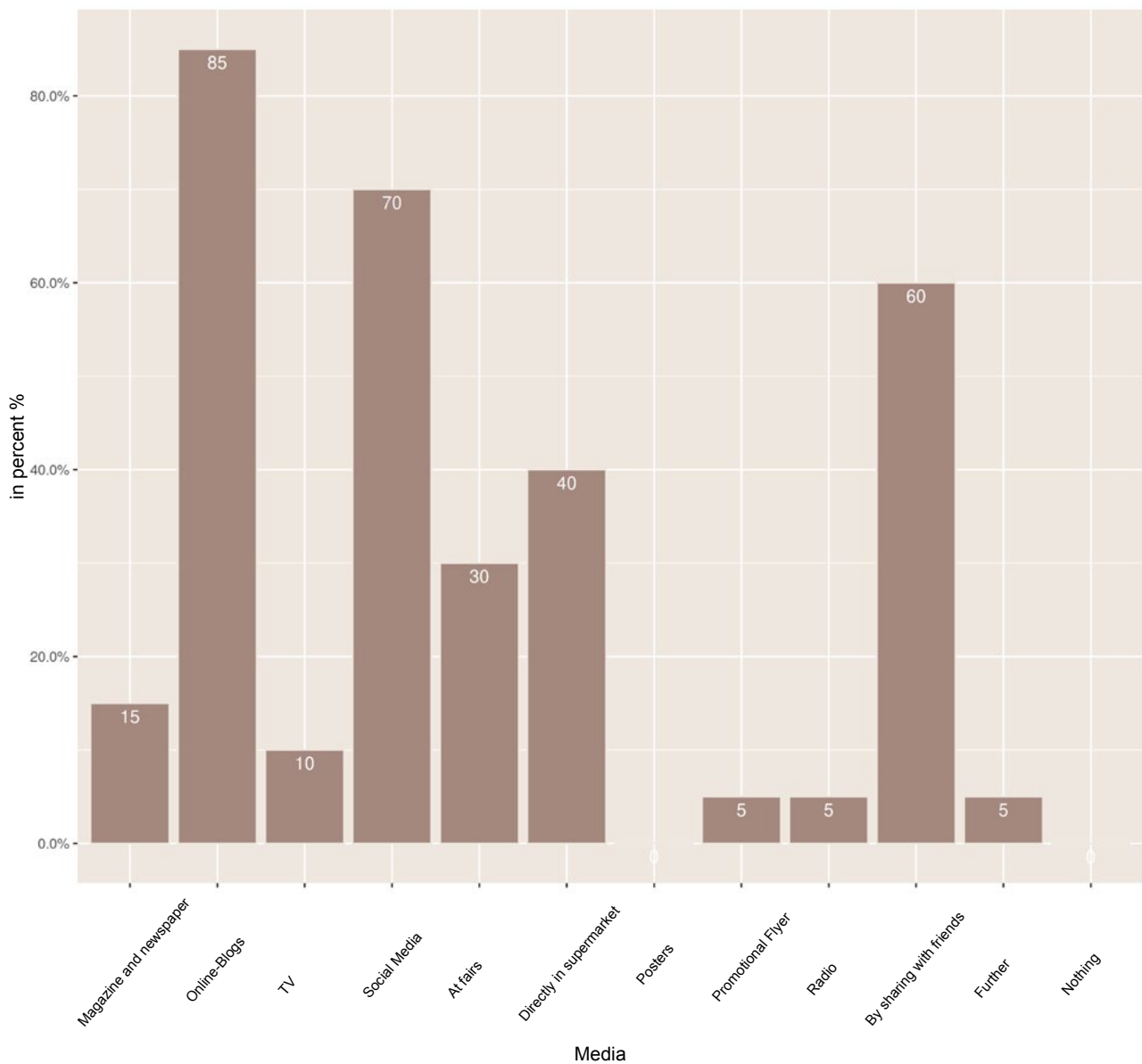
NON-VEGAN

Where do you find information about dietary trends and product innovations?
Veganz asked, greek non-vegans answered.



Source: Veganz Nutrition Survey

Where do you find information about dietary trends and product innovations?
Veganz asked, greek vegans answered.



Source: Veganz Nutrition Survey

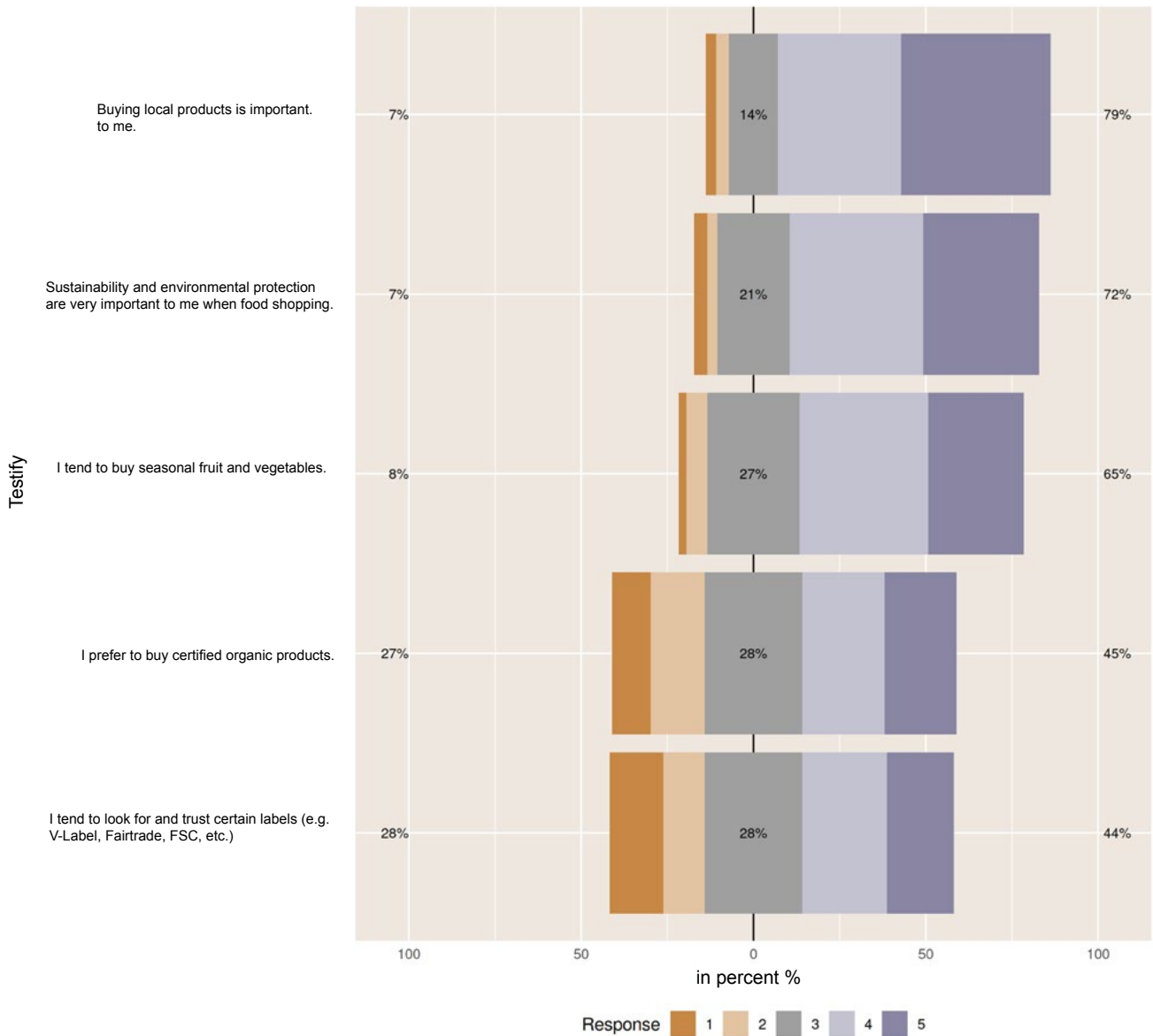
GREECE

NON-VEGAN

To what extent do the following statements describe you?

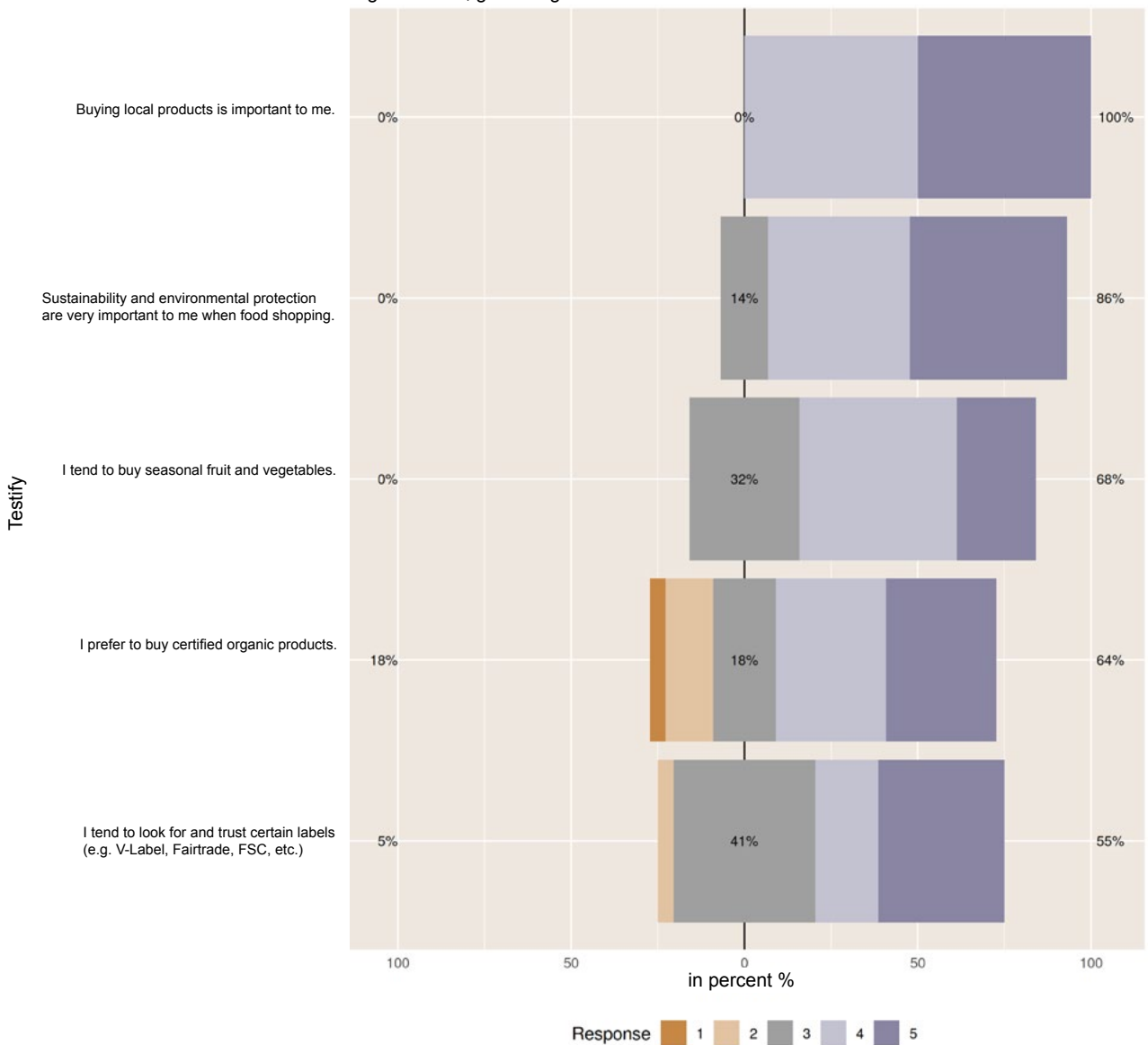
Scale from 1 "Totally agree" to 6 "Totally disagree"

Veganz asked, greek non-vegans answered.



Source: Veganz Nutrition Survey

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 Veganz asked, greek vegans answered.

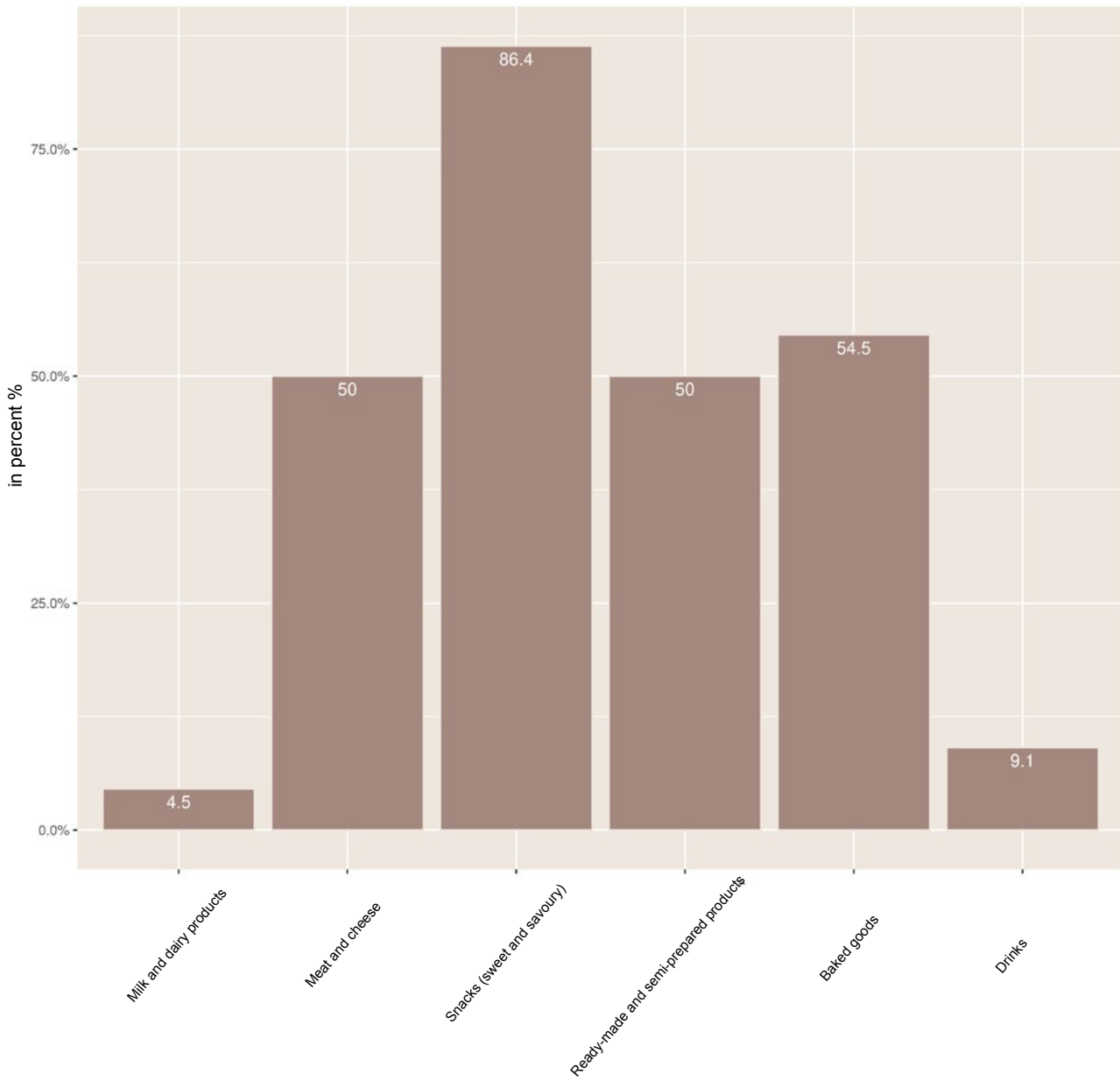


Source: Veganz Nutrition Survey

GREECE

VEGAN

What type of vegan alternatives would you like to see more of?
Veganz asked, greek vegans answered.

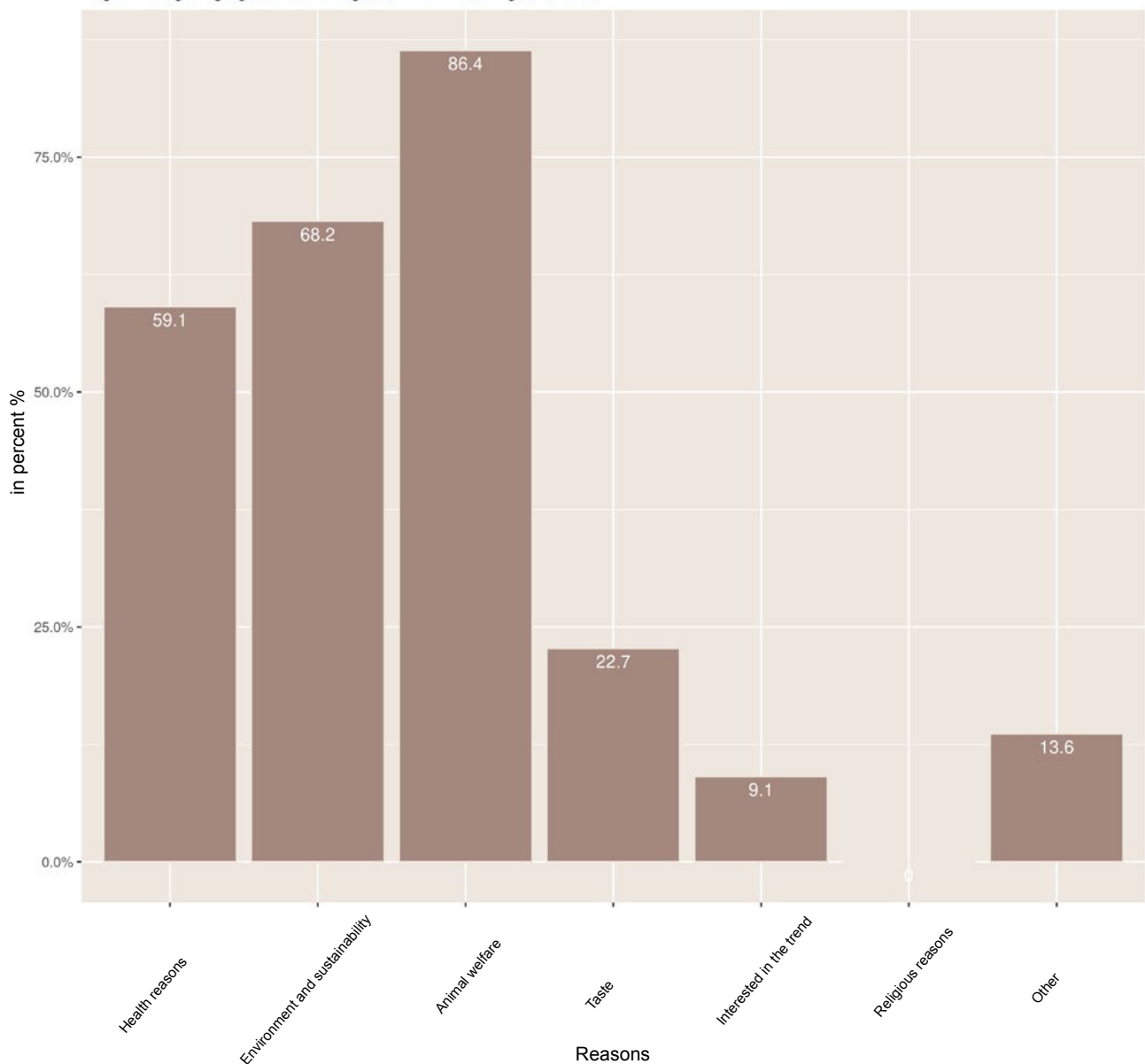


Media

Source: Veganz Nutrition Survey

What are your reasons for eating vegan?

Veganz asked, greek vegans answered.

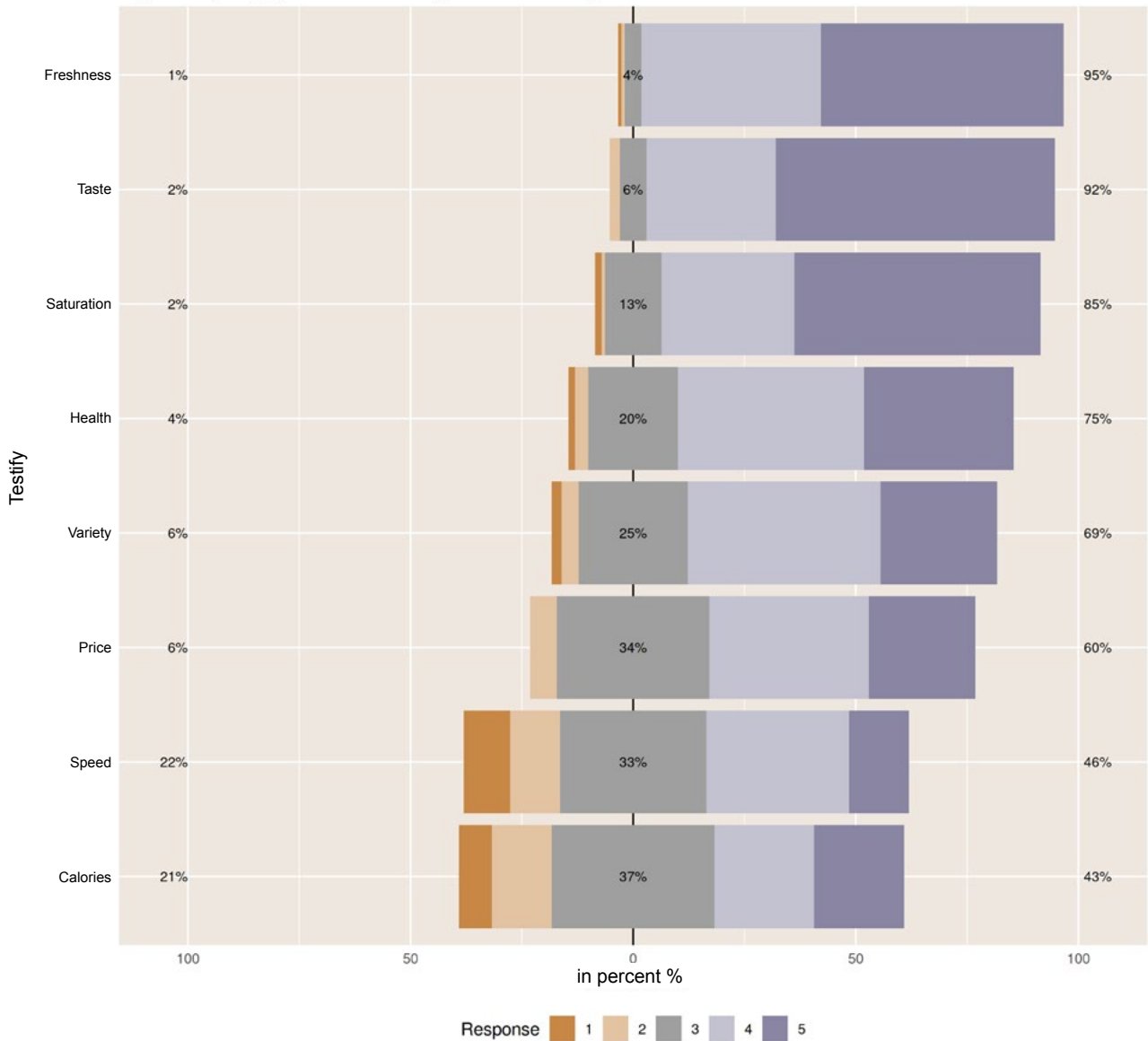


Source: Veganz Nutrition Survey

GREECE

VEGAN

How important are the following factors to you when it comes to food?
 Scale of 1 "Very important" to 6 "Completely unimportant"
 Veganz asked, greek vegans answered.



Source: Veganz Nutrition Survey

ITALY

When asked about their average monthly net income, 29.2 % of Italians indicated they had 1,000 - 1,500 € at their disposal. A further 19,3 % said their monthly net income was between 1.500 - 2.000 € and 16,3 % of Italians surveyed said they had no income of their own.

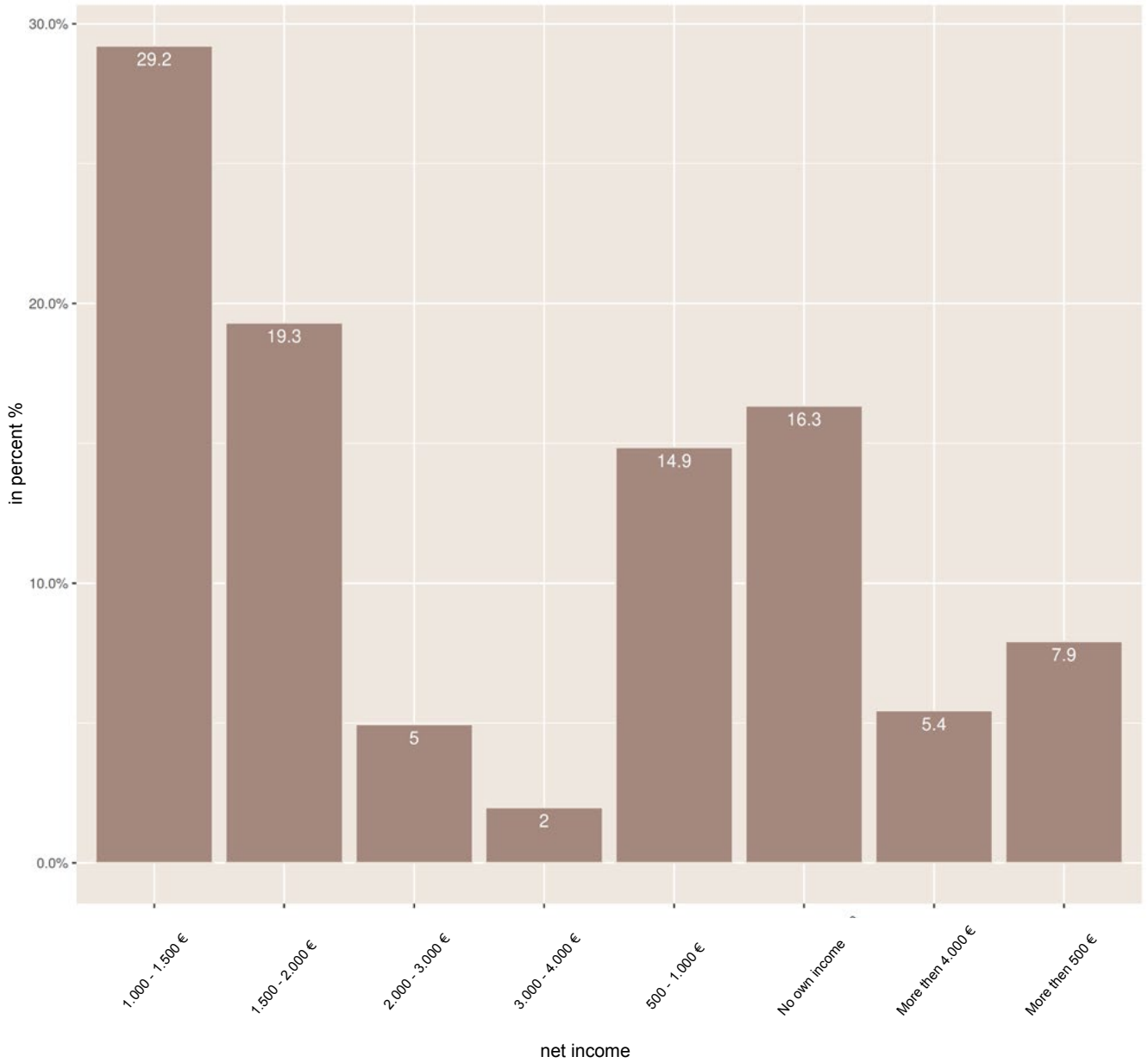
The main reason for a plant-based diet among surveyed Italian vegans in Italy is animal protection followed by the environment and sustainability as well as the health aspect.

For the most part, people in Italy cook themselves: 66 % of vegans and 60 % of non-vegans cook fresh daily. The Italian vegans' favourite information medium is the online blog at 69 %, followed by social media. They also like to talk with friends about the latest diet trends or read magazines and newspapers on related subjects. A third of Italian vegans get additional information at trade fairs. The other nutrition groups take a similar approach with the difference, however, that social media platforms are most important for them. Television also plays a role for 27 % of non-vegans in Italy. That is nearly 15 % more than with vegans. 90 % of Italian non-vegans and almost 86 % of

vegans buy their food at supermarkets. Additionally, about 74 % of Italian vegans said they like to shop at health food stores. Almost 40 % buy their plant-based food items either at discount retailers or online. These tendencies are less pronounced among the other food groups in Italy. Nevertheless, 49 % of those surveyed (almost half) say they buy food in health food stores as well.

Another insight is that Italian vegans place great emphasis on quality when buying their products. Of equal importance are sustainability and flavour. Comparatively less important for them are certifications and innovativeness of the food products. In the areas of baked goods as well as cured meats and cheese alternatives, more than half of Italian vegans, and those surveyed, would like to see a larger assortment of plant-based products. Environmental protection and seasonality are at the top of the list for all nutritional groups when making decisions at the supermarket. Generally speaking, non-vegan Italians are more sceptical when it comes to certifications and labels than vegans.

What is your net monthly income?
Veganz asked, Italian answered.

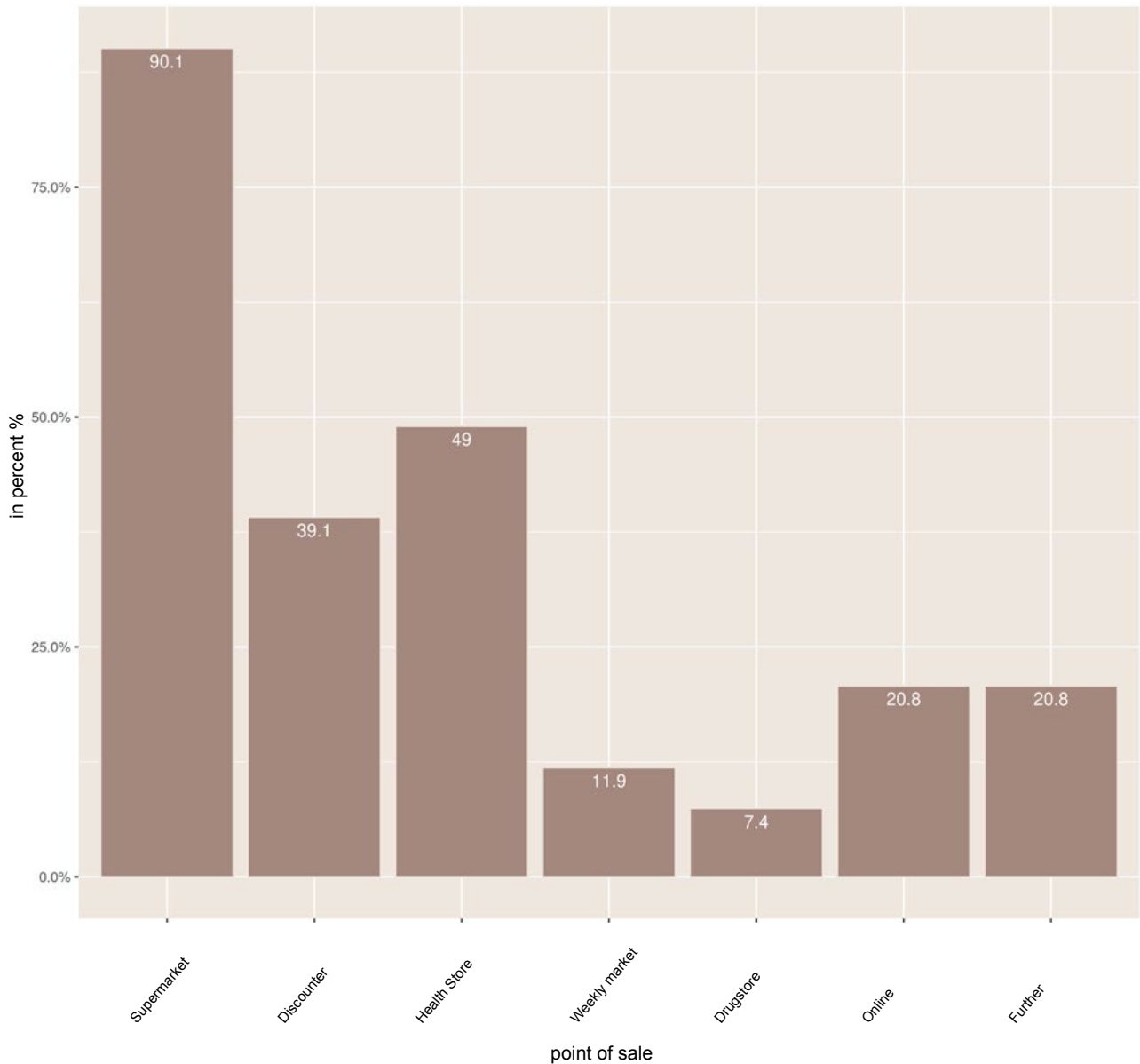


Source: Veganz Nutrition Survey

ITALY

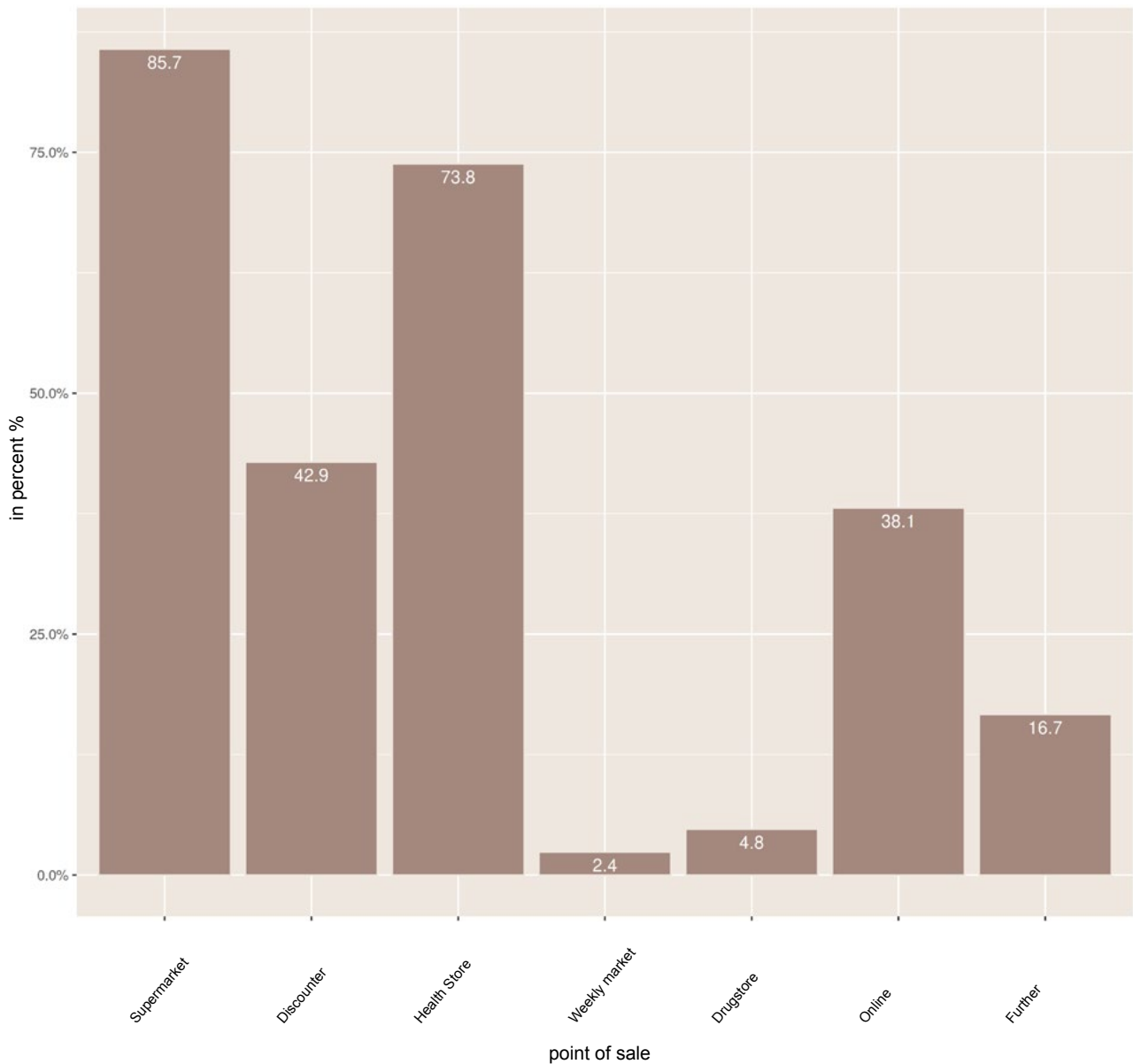
NON-VEGAN

Where do you buy food?
Veganz asked, italian non-vegans answered.



Source: Veganz Nutrition Survey

Where do you buy food?
Veganz asked, italian vegans answered.

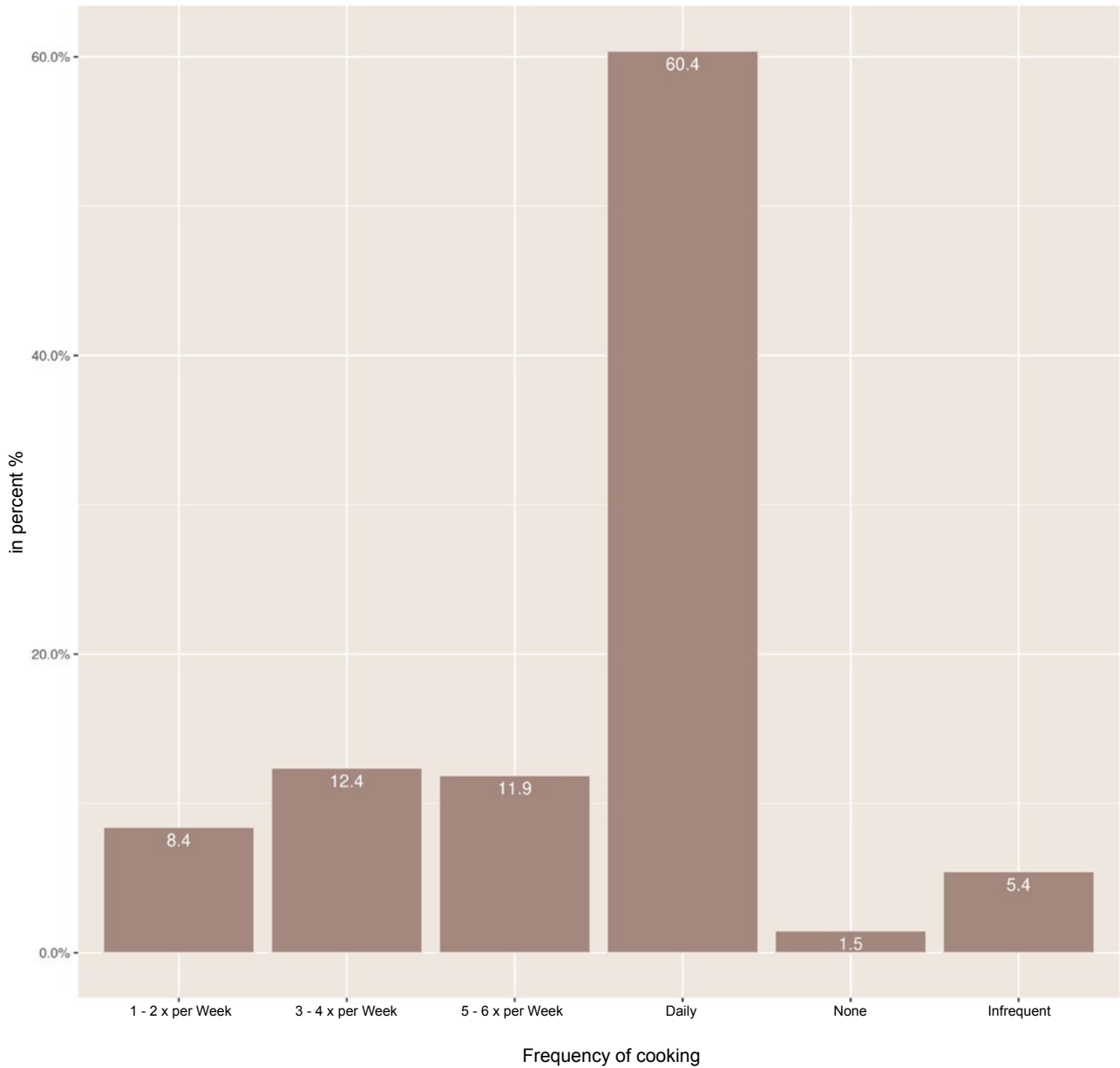


Source: Veganz Nutrition Survey

ITALY

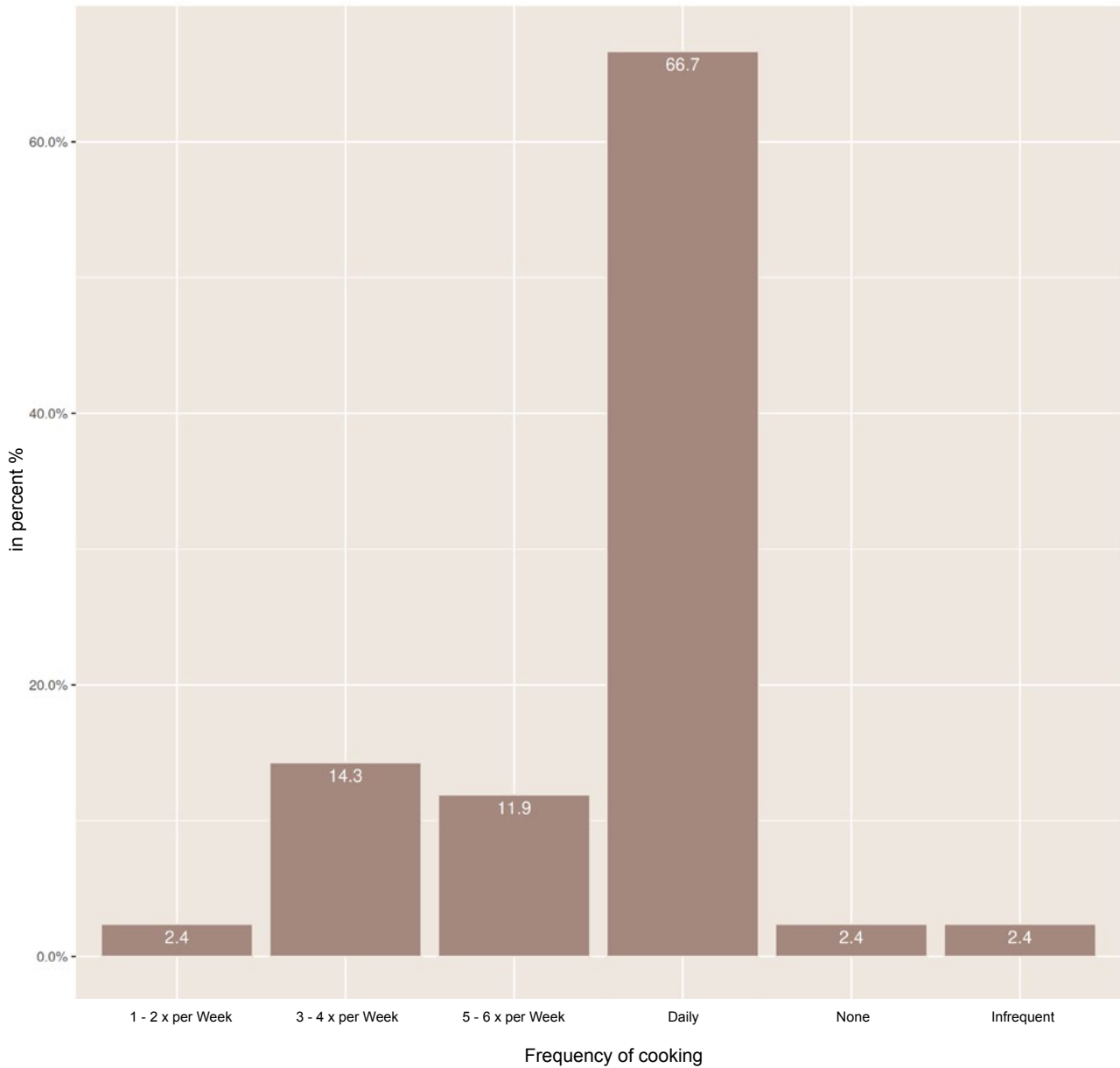
NON-VEGAN

How often do you cook?
Veganz asked, italian non-vegans answered.



Source: Veganz Nutrition Survey

How often do you cook?
Veganz asked, italian vegans answered.

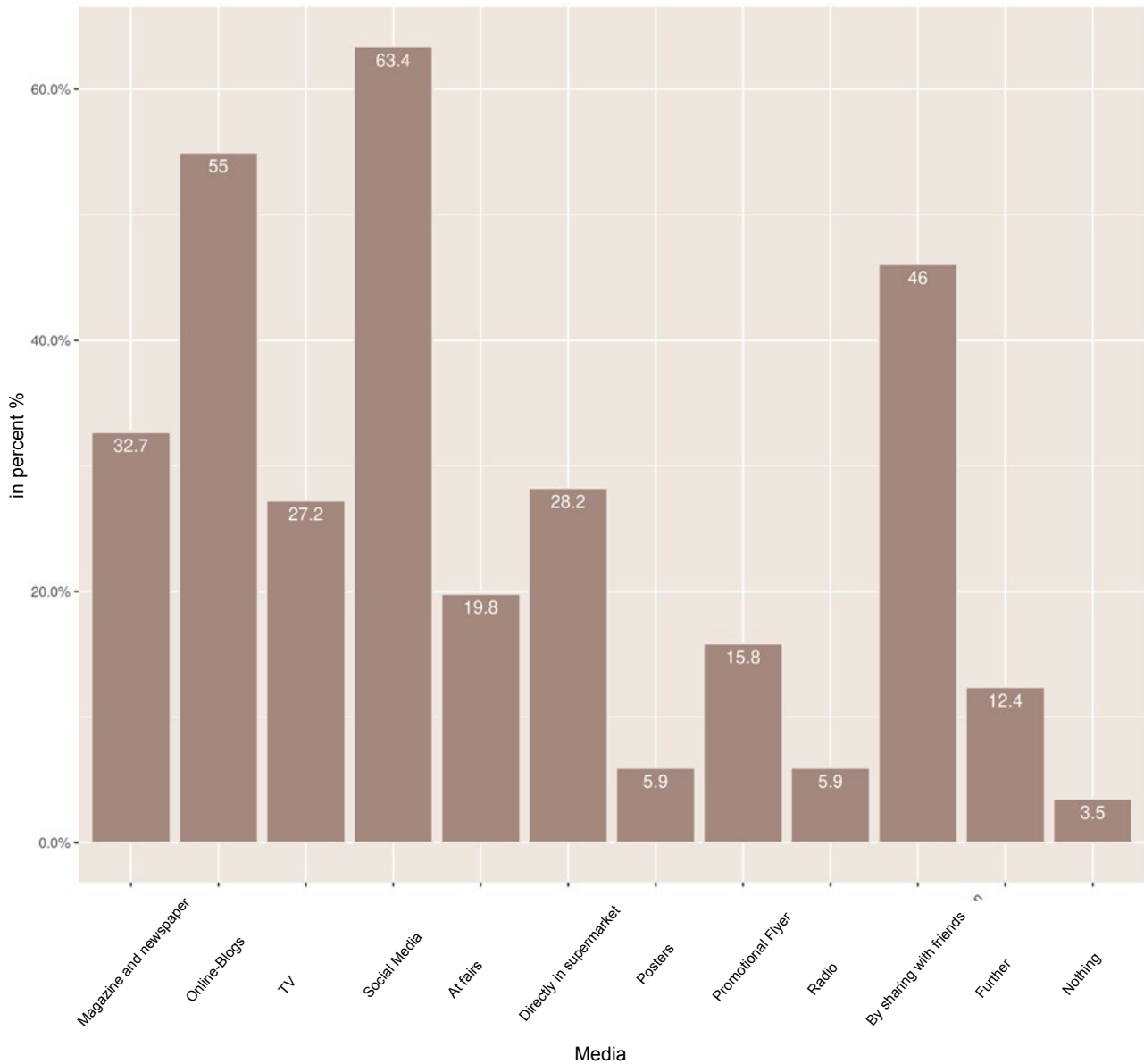


Source: Veganz Nutrition Survey

ITALY

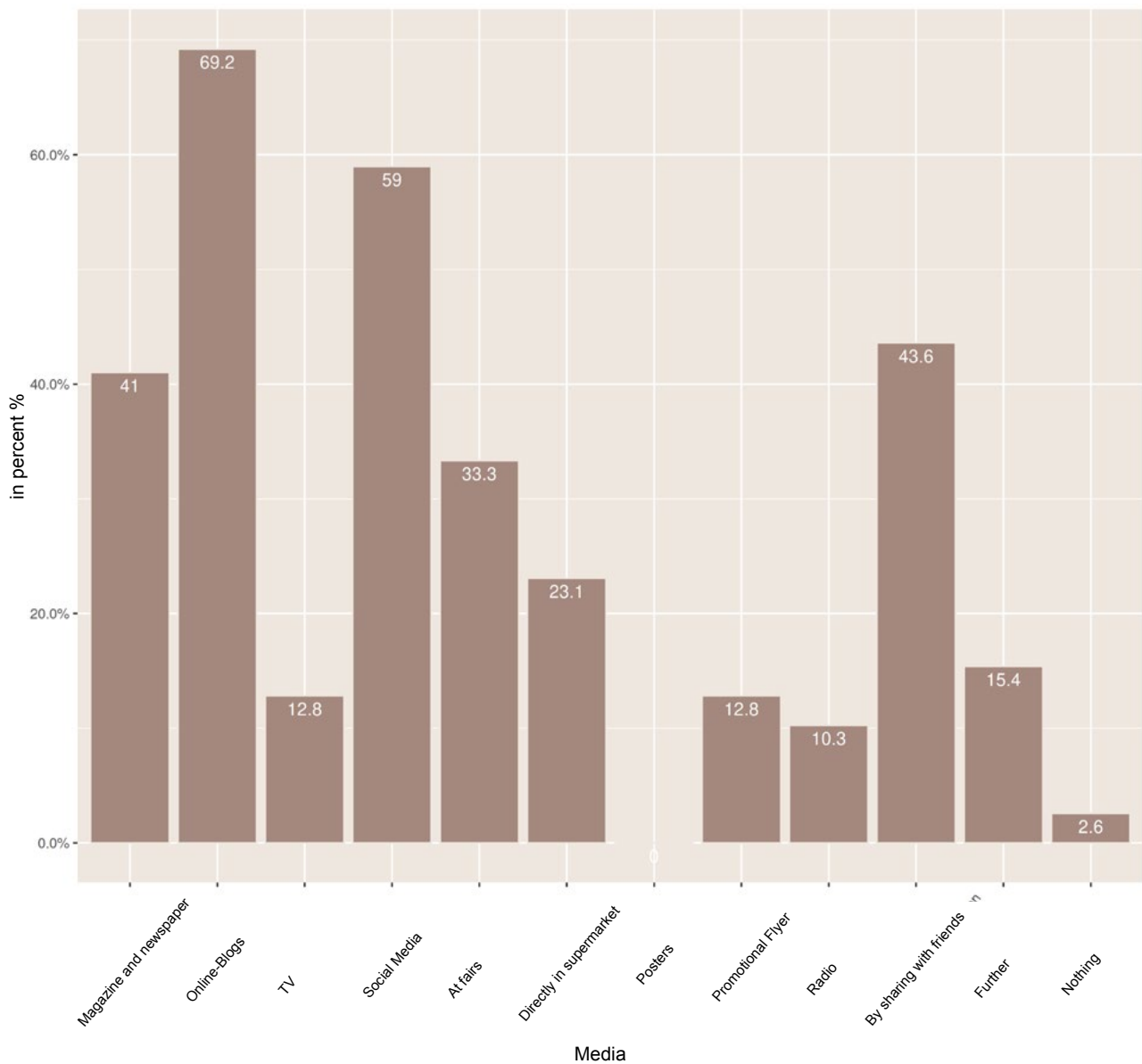
NON-VEGAN

Where do you find information about dietary trends and product innovations?
Veganz asked, italian non-vegans answered.



Source: Veganz Nutrition Survey

Where do you find information about dietary trends and product innovations?
Veganz asked, Italian vegans answered.



Source: Veganz Nutrition Survey

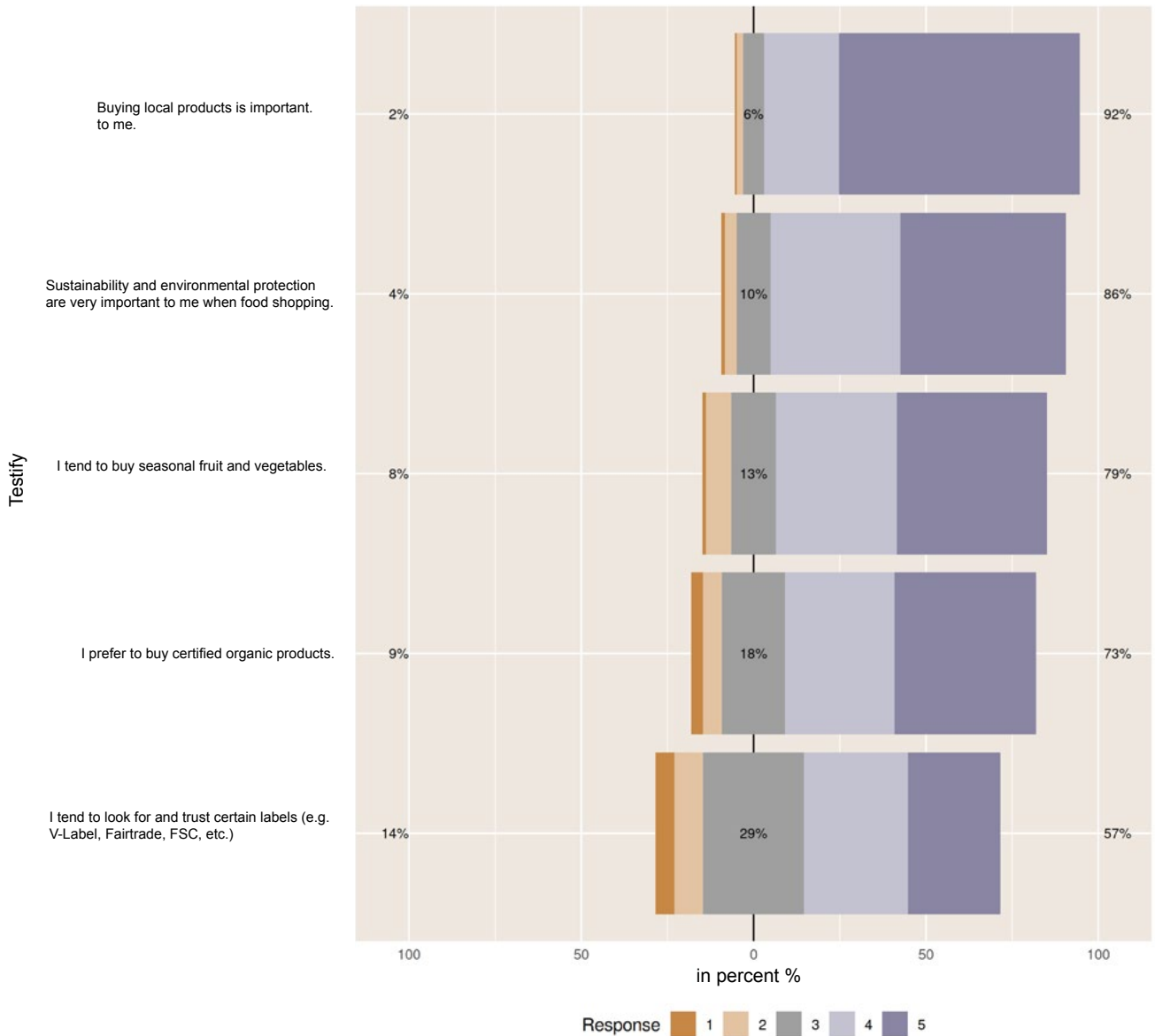
ITALY

NON-VEGAN

To what extent do the following statements describe you?

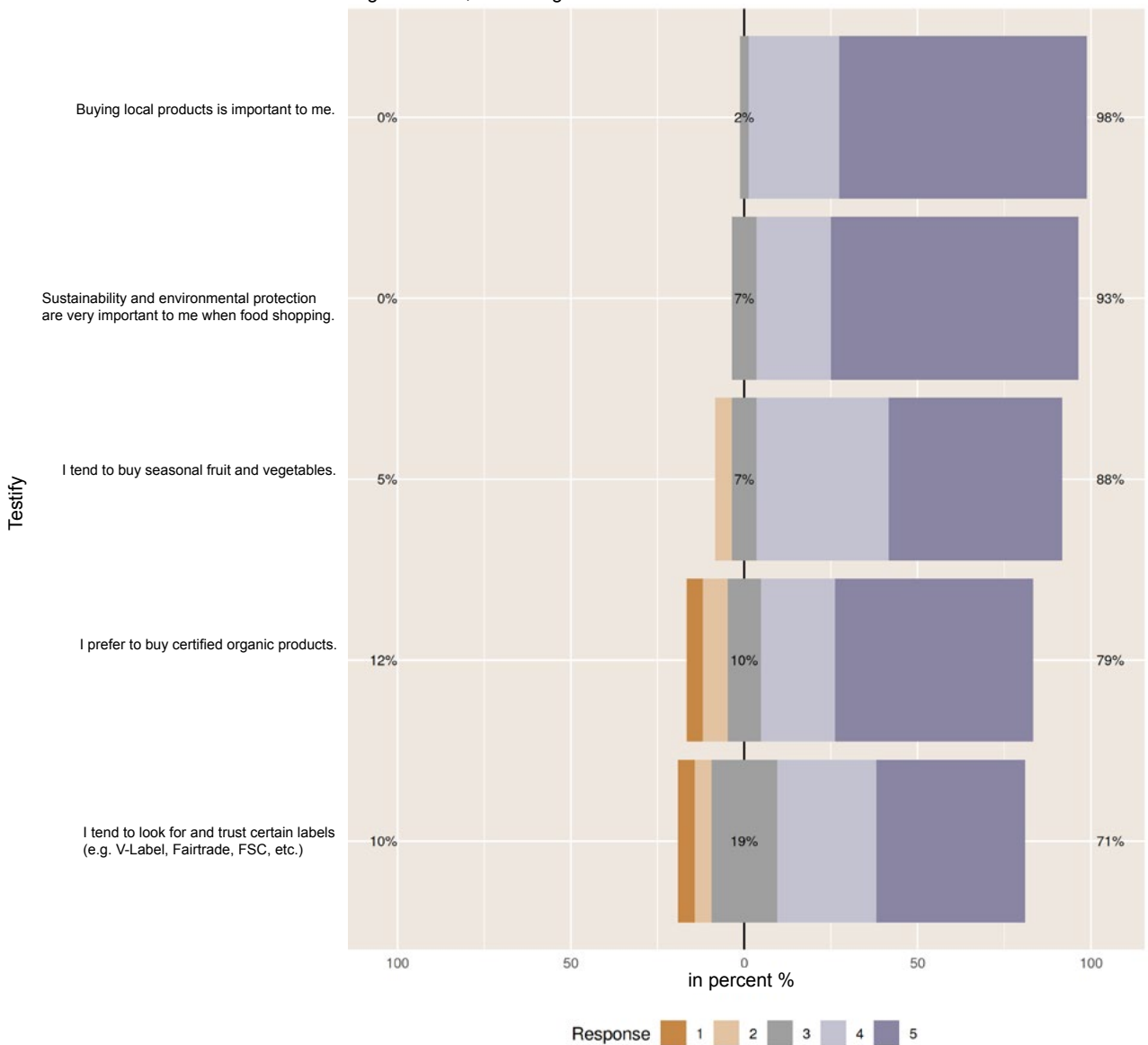
Scale from 1 "Totally agree" to 6 "Totally disagree"

Veganz asked, italian non-vegans answered.



Source: Veganz Nutrition Survey

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 Veganz asked, italian vegans answered.

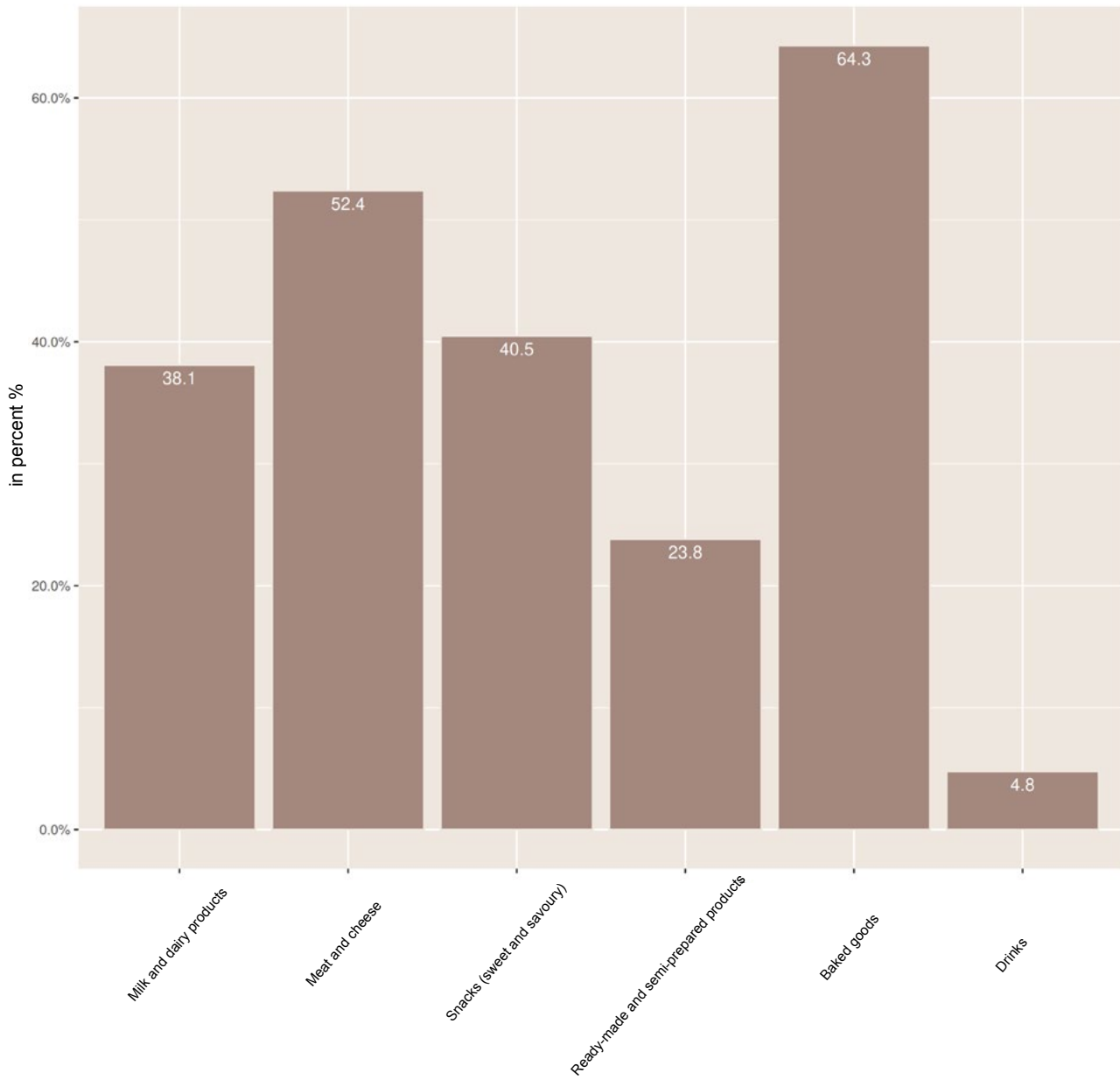


Source: Veganz Nutrition Survey

ITALY

VEGAN

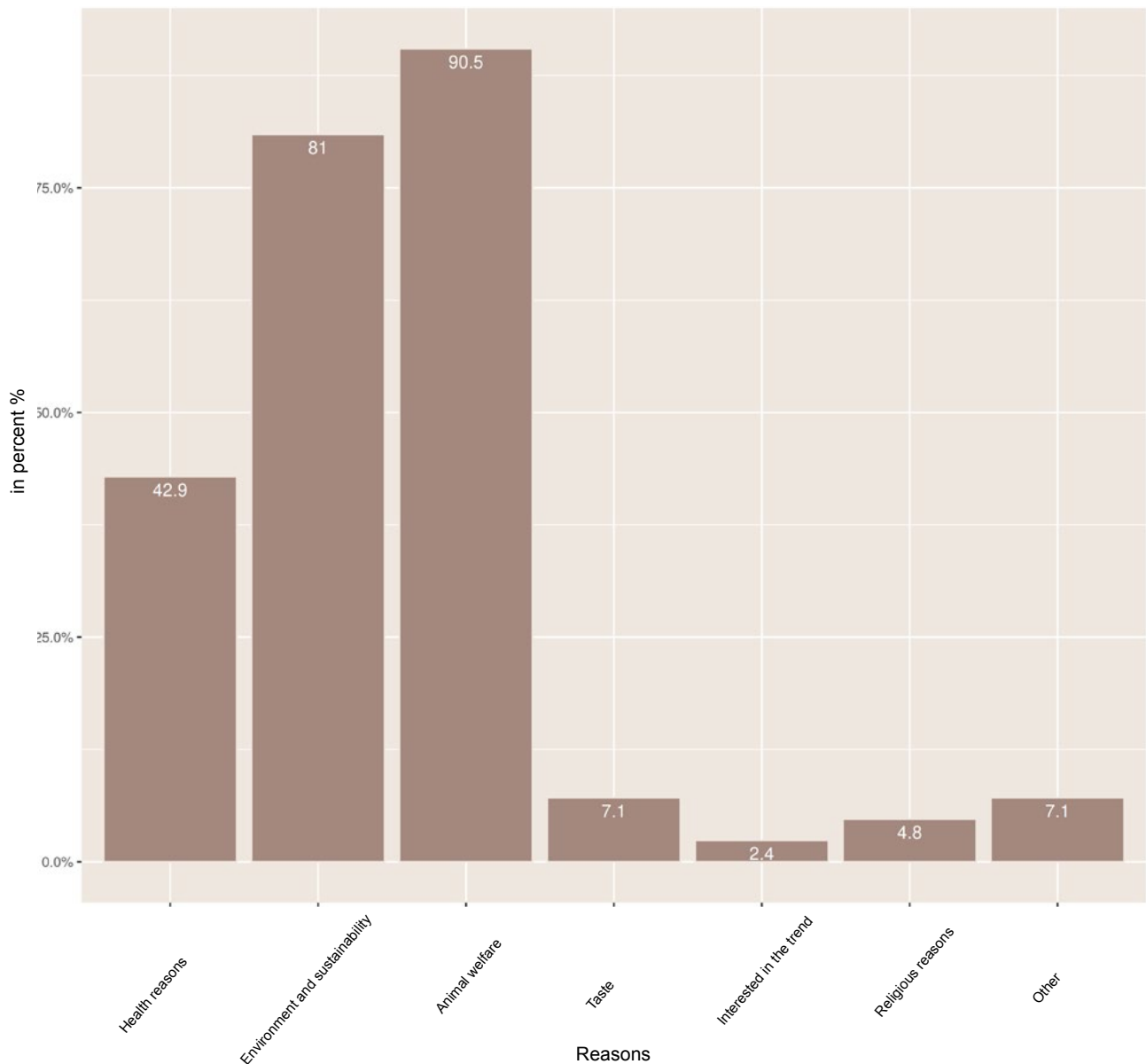
What type of vegan alternatives would you like to see more of?
Veganz asked, italian vegans answered.



Media

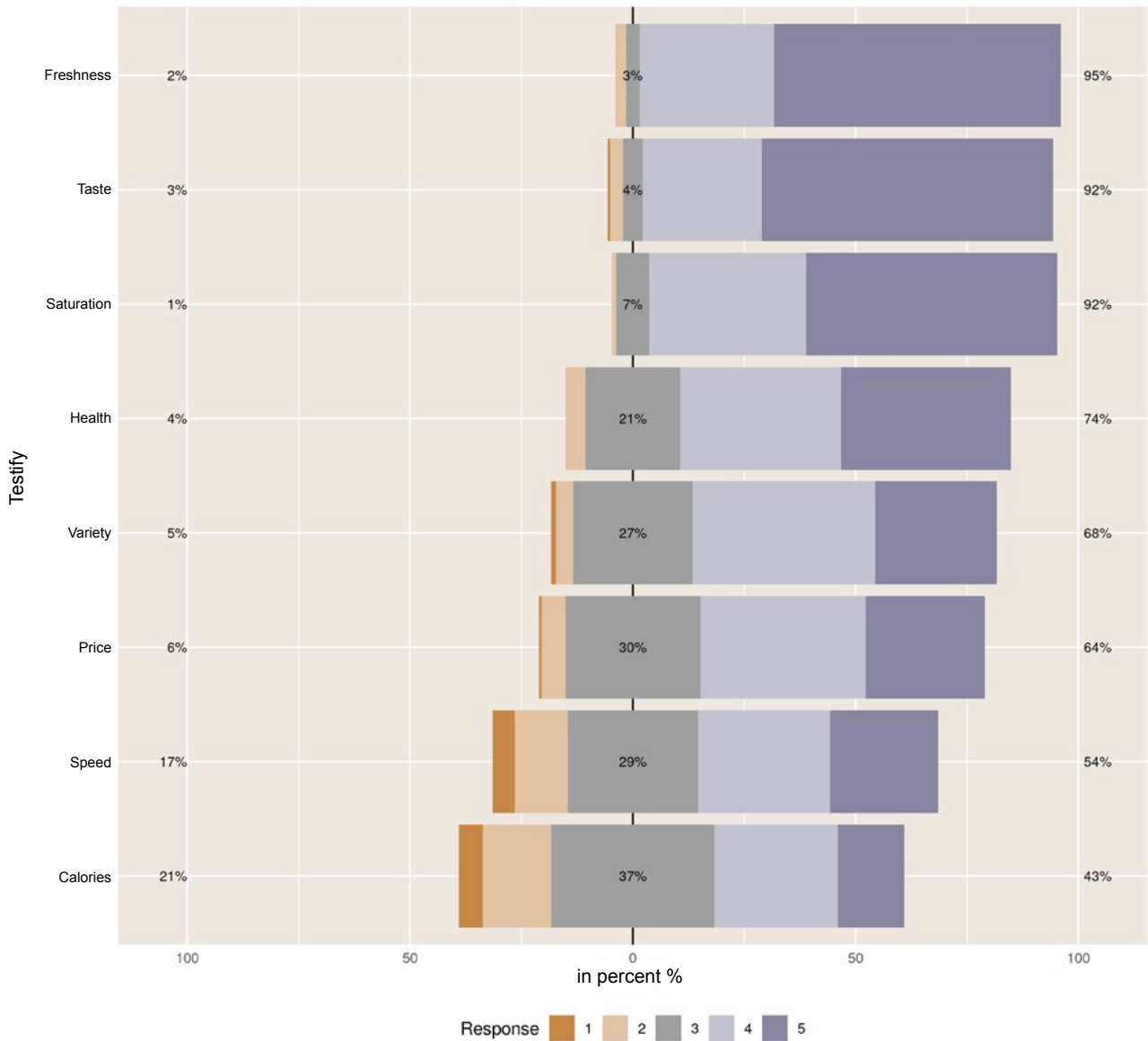
Source: Veganz Nutrition Survey

What are your reasons for eating vegan?
Veganz asked, italian vegans answered.



Source: Veganz Nutrition Survey

How important are the following factors to you when it comes to food?
 Scale of 1 "Very important" to 6 "Completely unimportant"
 Veganz asked, italian vegans answered.



Source: Veganz Nutrition Survey

CROATIA

The majority of our Croatian survey participants said they had a monthly net income of 500 - 1.000 €. The rest of the earners were spread out fairly evenly, whereby only a few could say they earned over 2.000 €.

All Croatian vegans put animal welfare at the top of their motivation list while 86 % said they were vegan for environmental reasons. Just 14 % adopted the lifestyle for health reasons.

Almost 70 % of Croatian vegans cook for themselves on a daily basis, 30 % less than the other nutrition groups.

Croatian vegans get information on the latest food trends through social media and about a third from online blogs and exchanges with friends. With non-vegans, magazines and newspapers, as well as TV and advertising flyers play a decisive role.

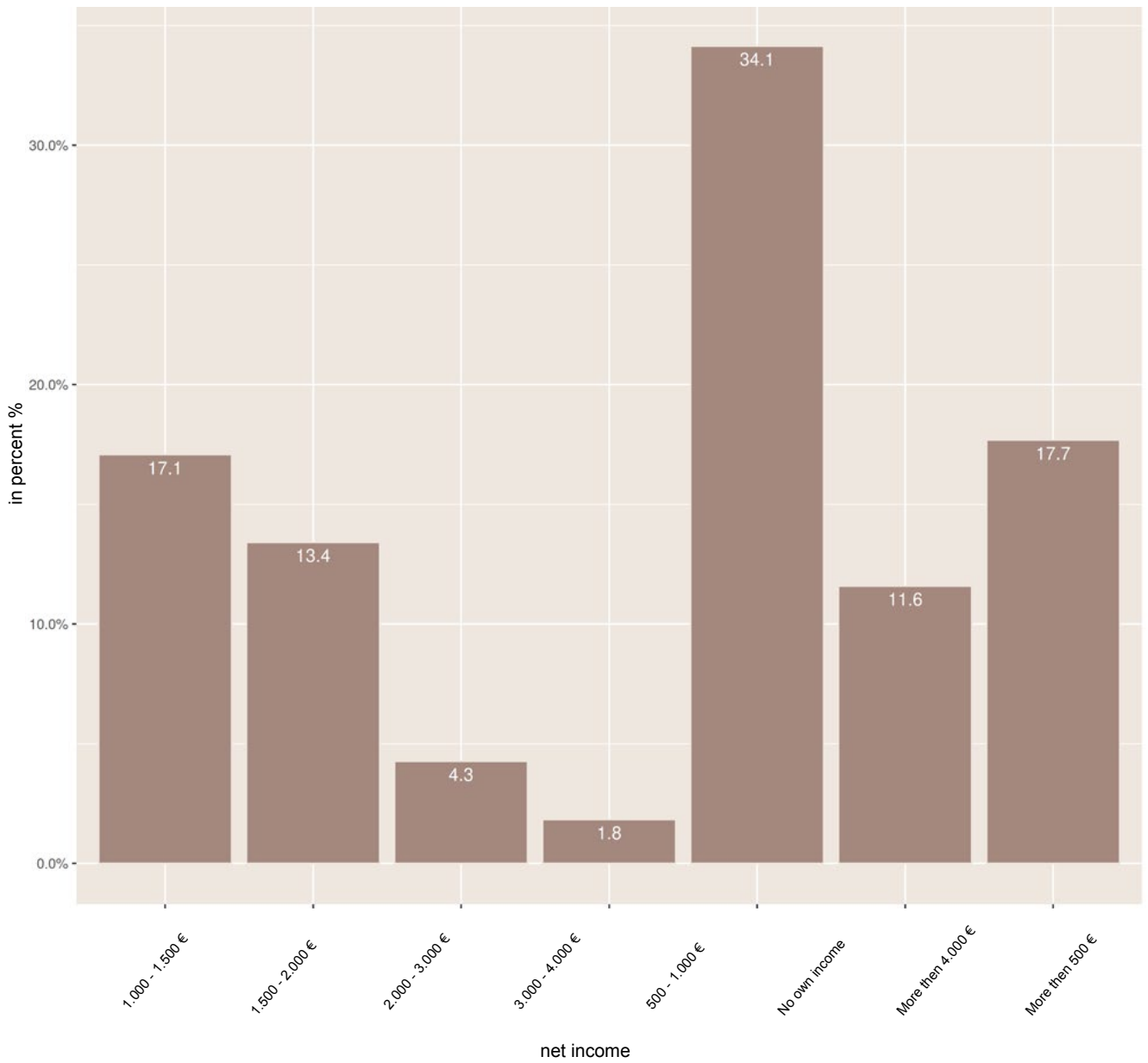
Non-vegan Croatians buy their food mainly in supermarkets while more than half go to health food stores and over one third visit discount retailers. The Croatian vegans' willingness is less pronounced, with only 38 % saying they would

consider the health food store for their food purchases. Retail discounters are also largely avoided.

The most important attributes for vegan Croatians are flavour and quality followed by transparency/traceability and ingredients. Opinions differ in regard to regionality, certifications and brand awareness. Almost 83 % of Croatian vegans would like to see more variety when it comes to cured meats and cheese. 38 % of those surveyed said they would like to see more choice in the alternative dairy section.

Vegans in Croatia place special value on quality seals and labels when purchasing foodstuffs with 93 % saying they trust them. The other nutrition groups feel the opposite: Just 45 % said that they trust seals and labels at the supermarket. Even certified organic products aren't convincing for 52 % of Croatian non-vegans. In general, it can be said that on average, Croatian vegans attach more importance to the sustainability aspect in food shopping than the other food groups.

What is your net monthly income?
Veganz asked, croatian answered.

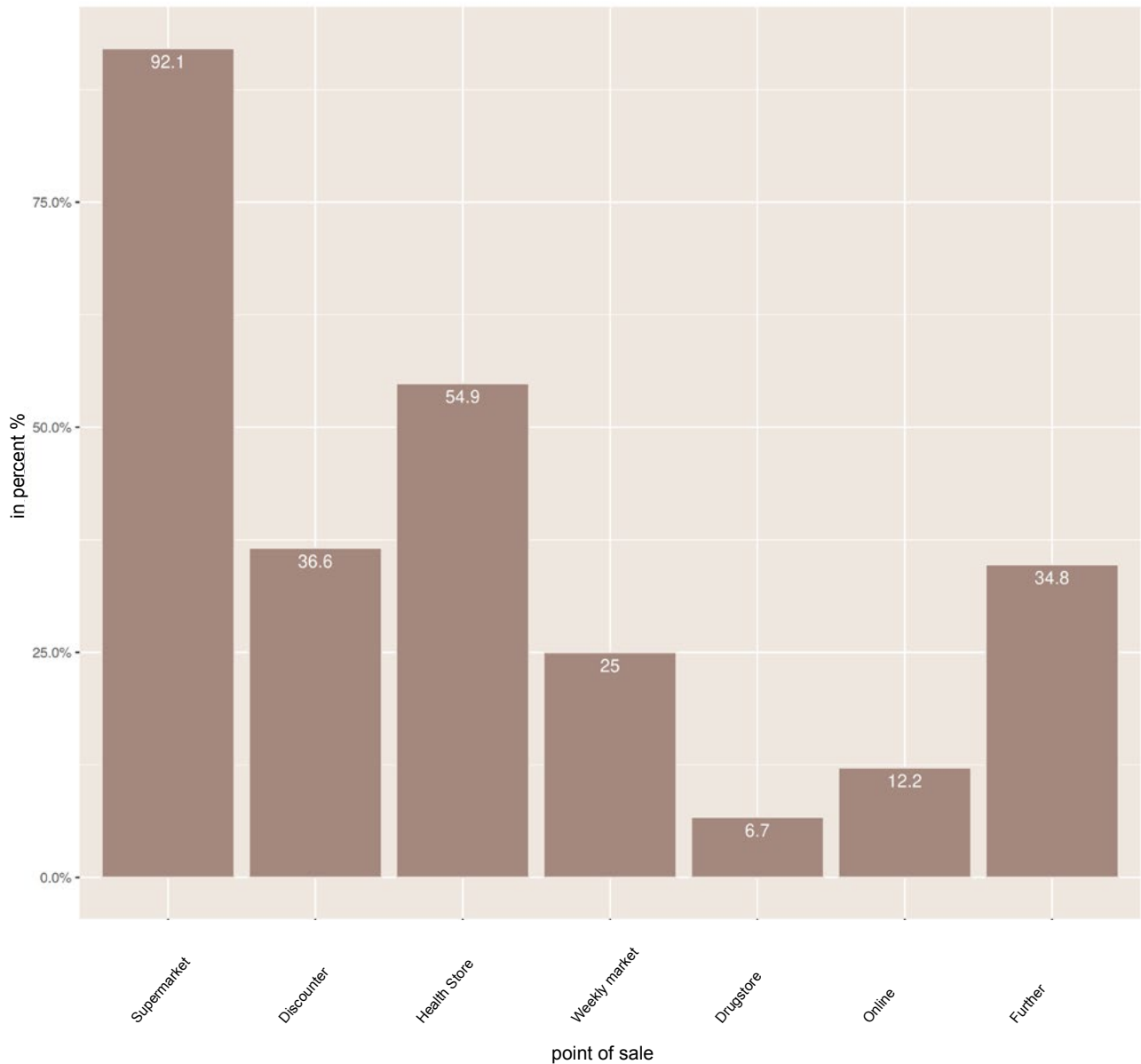


Source: Veganz Nutrition Survey

CROATIA

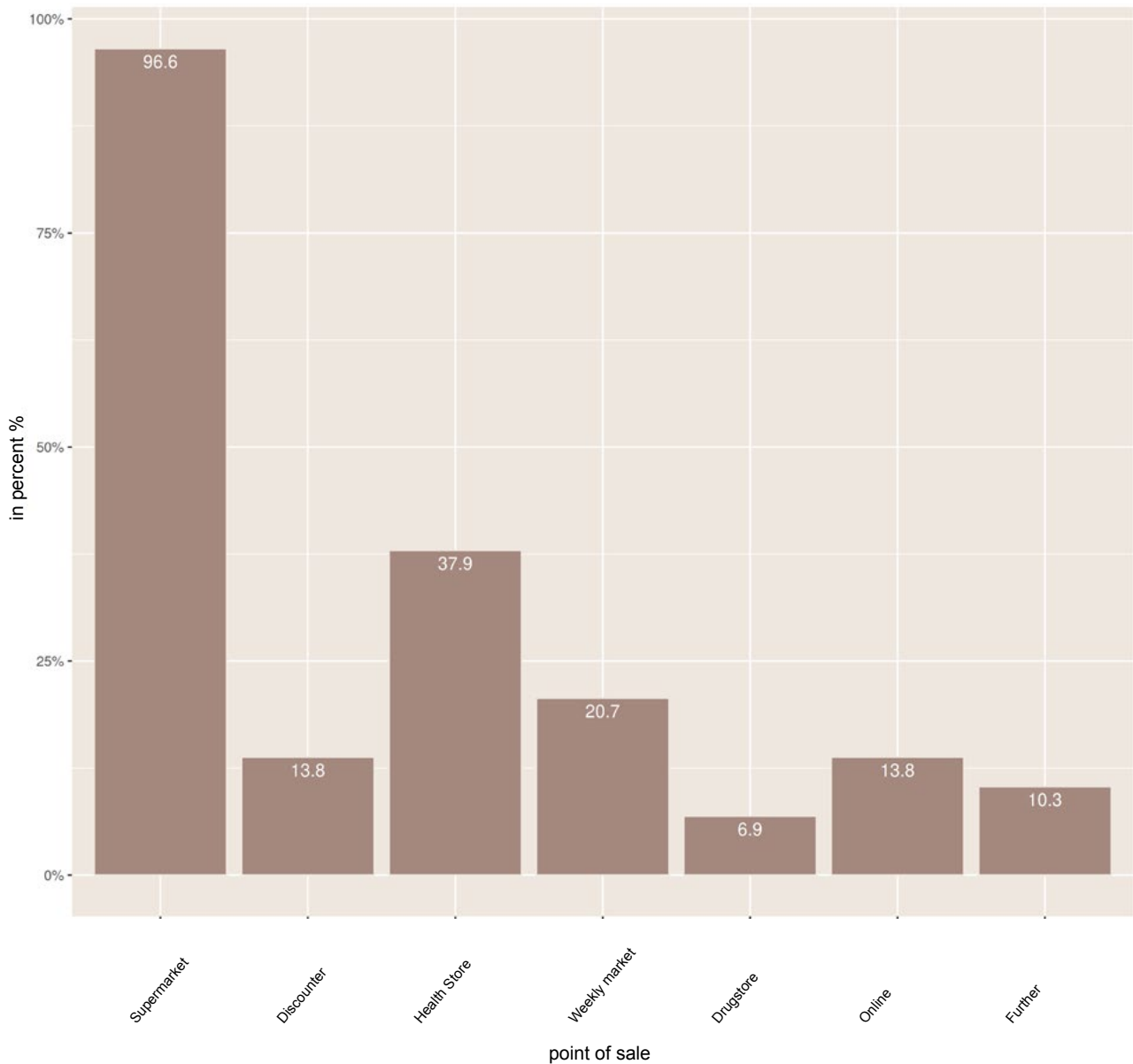
NON-VEGAN

Where do you buy food?
VeganZ asked, croatian non-vegans answered.



Source: VeganZ Nutrition Survey

Where do you buy food?
Veganz asked, croatian vegans answered.

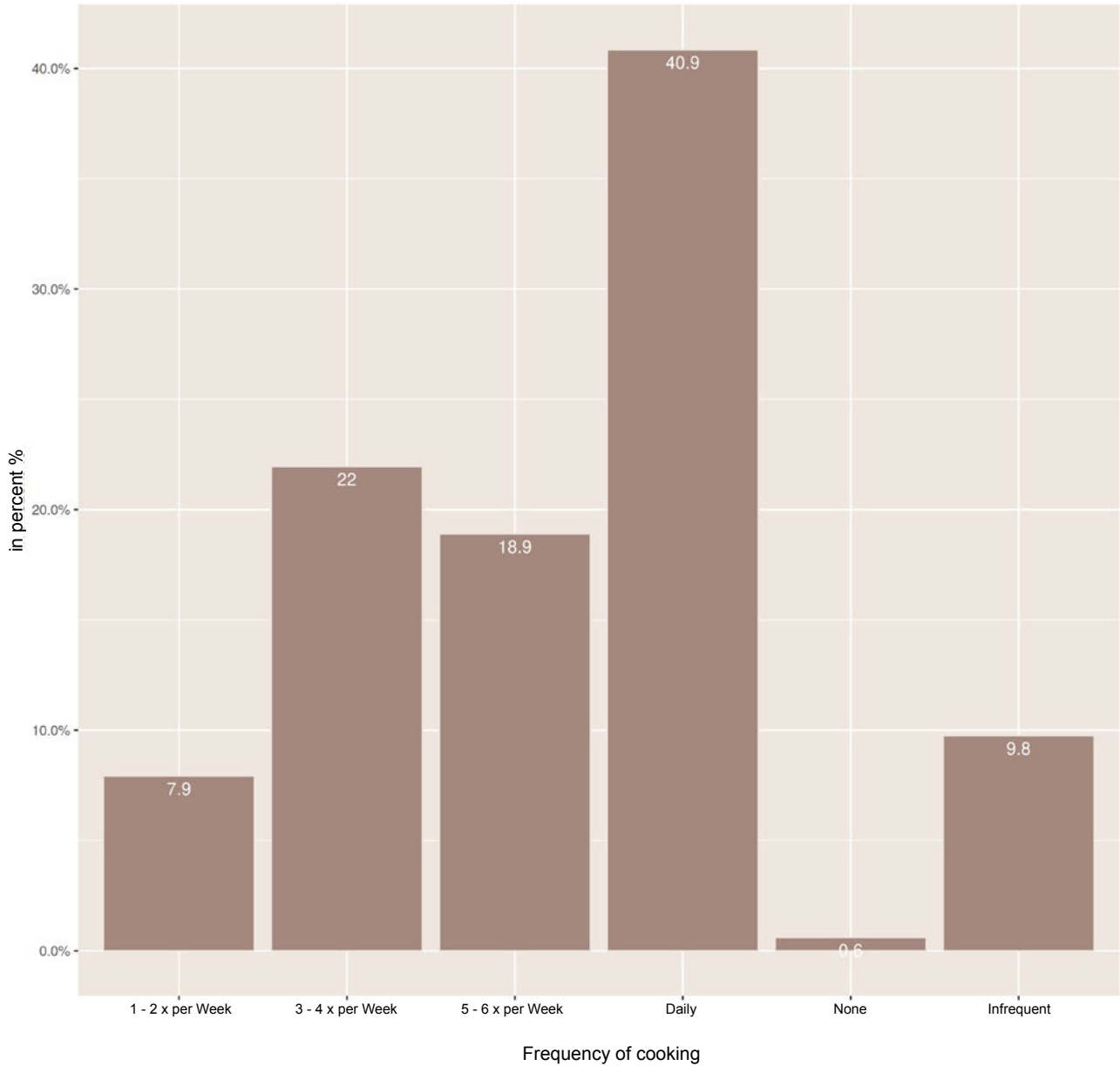


Source: Veganz Nutrition Survey

CROATIA

NON-VEGAN

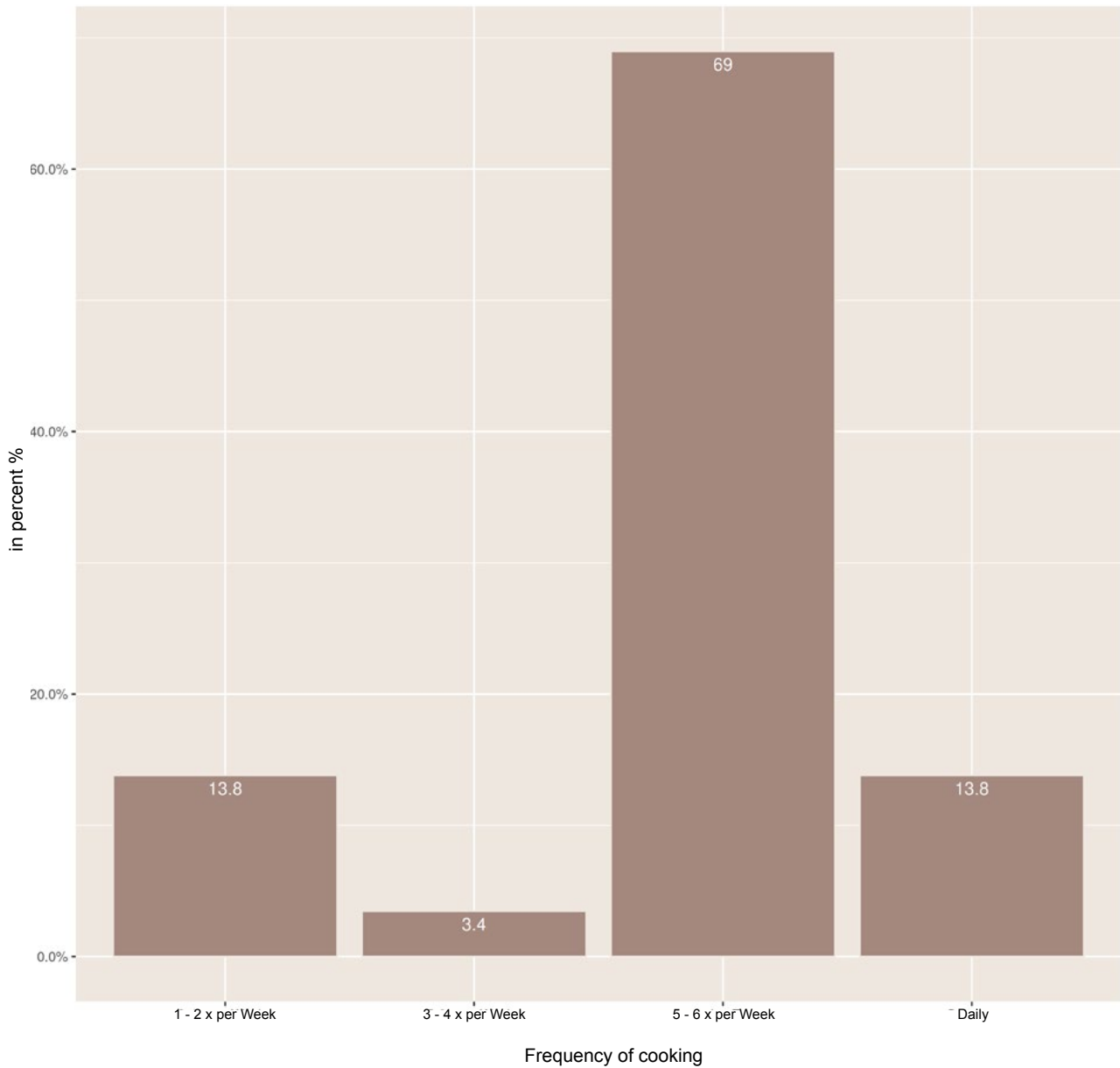
How often do you cook?
Veganz asked, croatian non-vegans answered.



Source: Veganz Nutrition Survey

How often do you cook?

Veganz asked, croatian vegans answered.

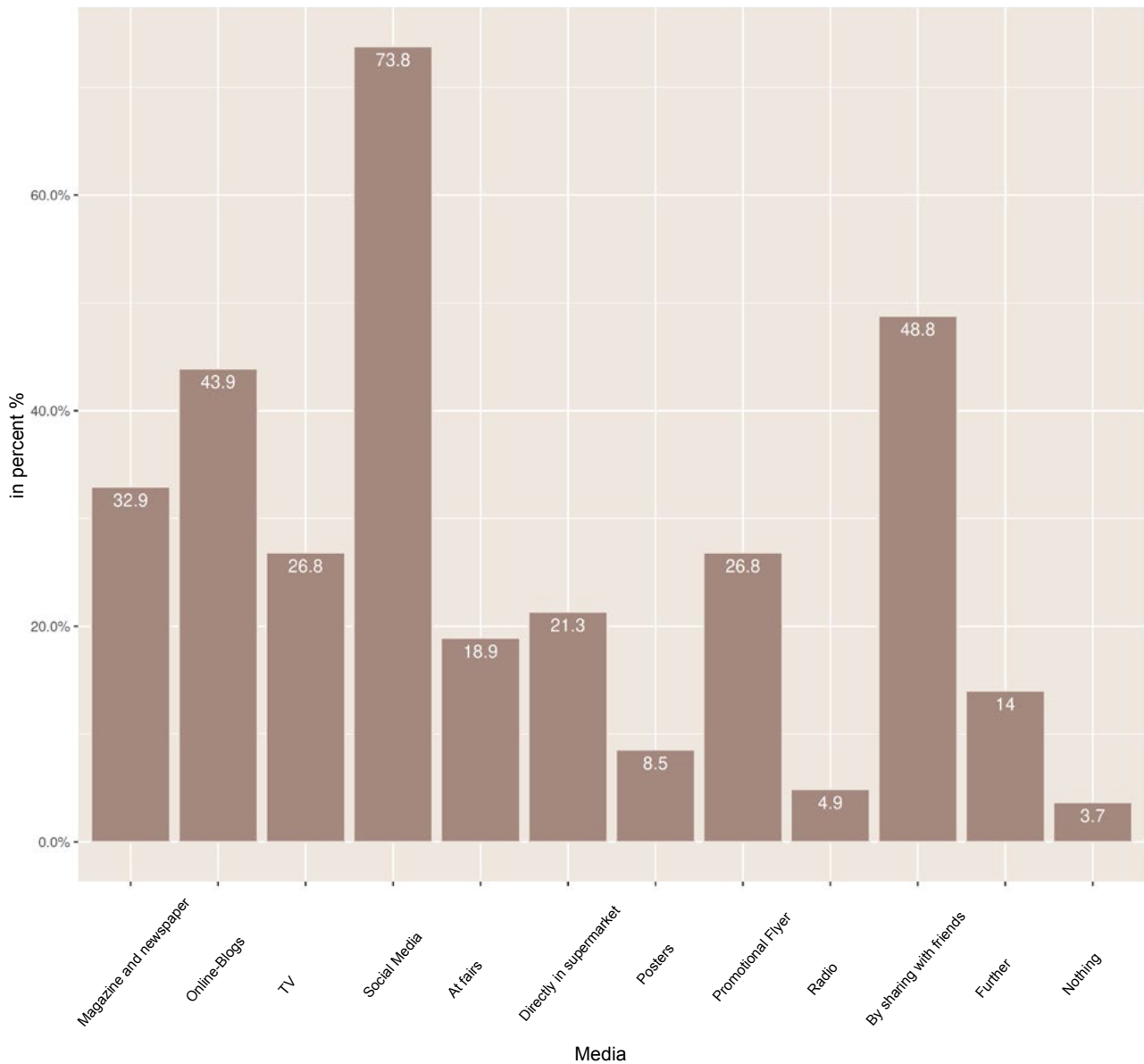


Source: Veganz Nutrition Survey

CROATIA

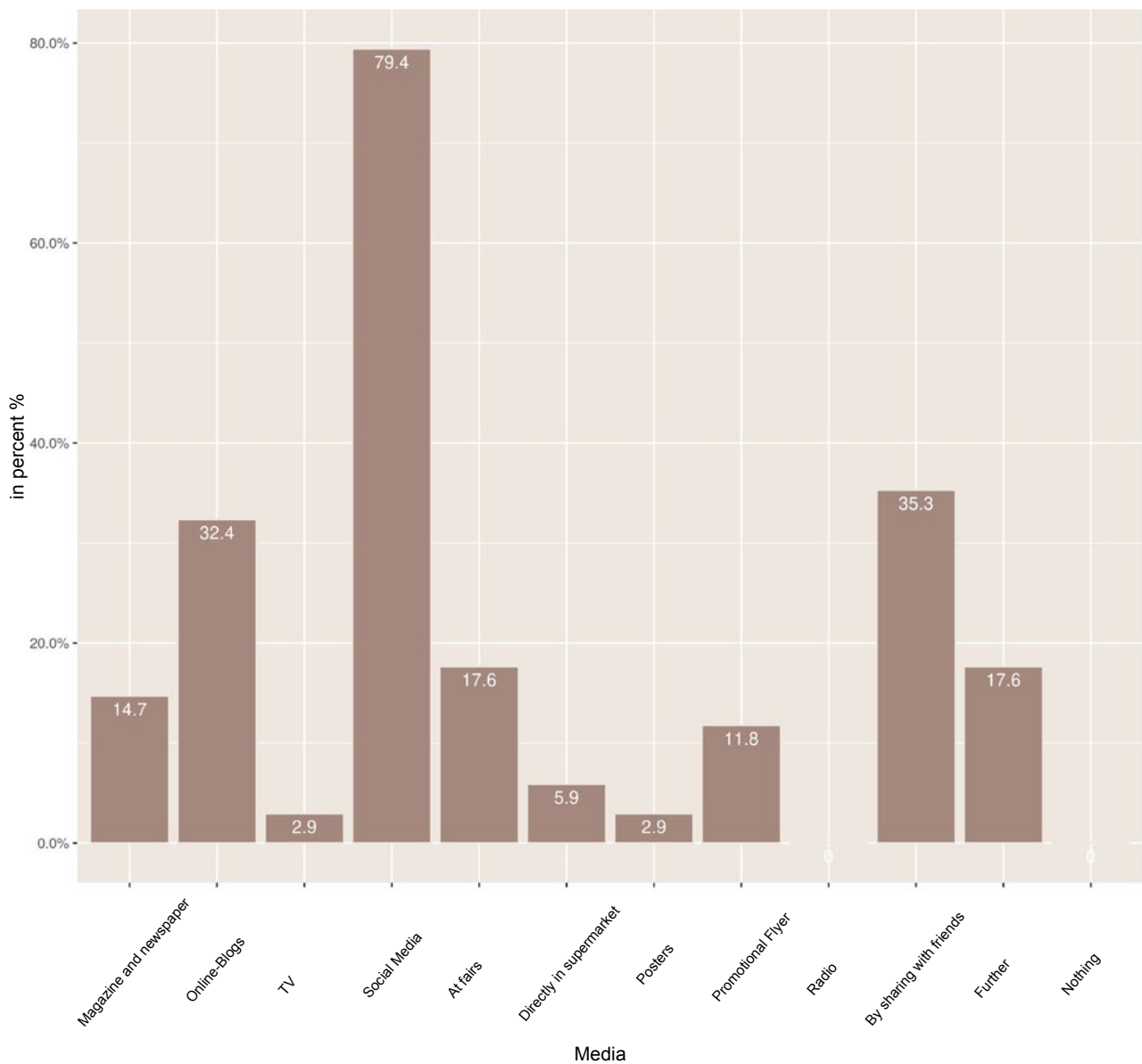
NON-VEGAN

Where do you find information about dietary trends and product innovations?
Veganz asked, croatian non-vegans answered.



Source: Veganz Nutrition Survey

Where do you find information about dietary trends and product innovations?
Veganz asked, croatian vegans answered.

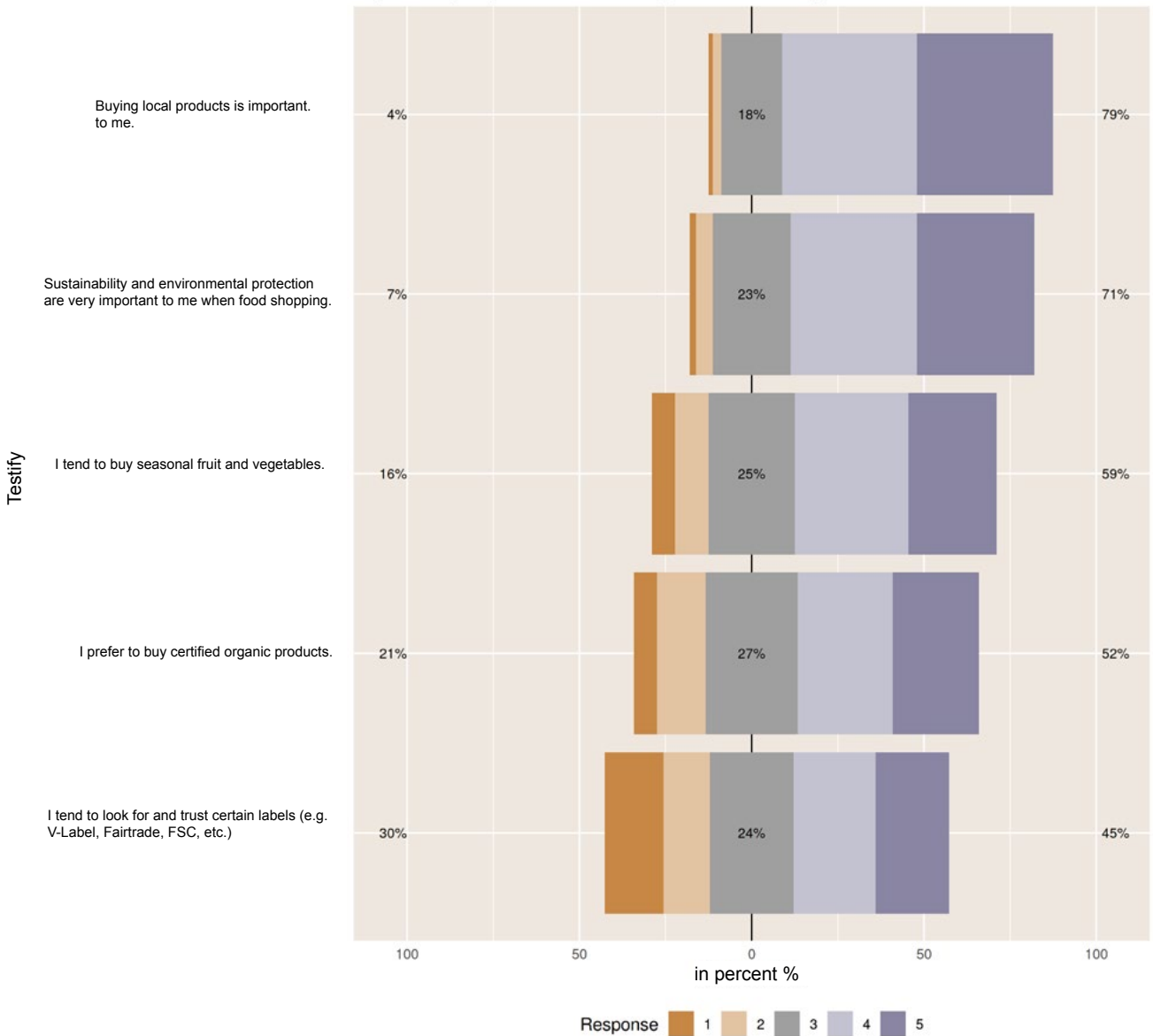


Source: Veganz Nutrition Survey

CROATIA

NON-VEGAN

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 VeganZ asked, croatian non-vegans answered.

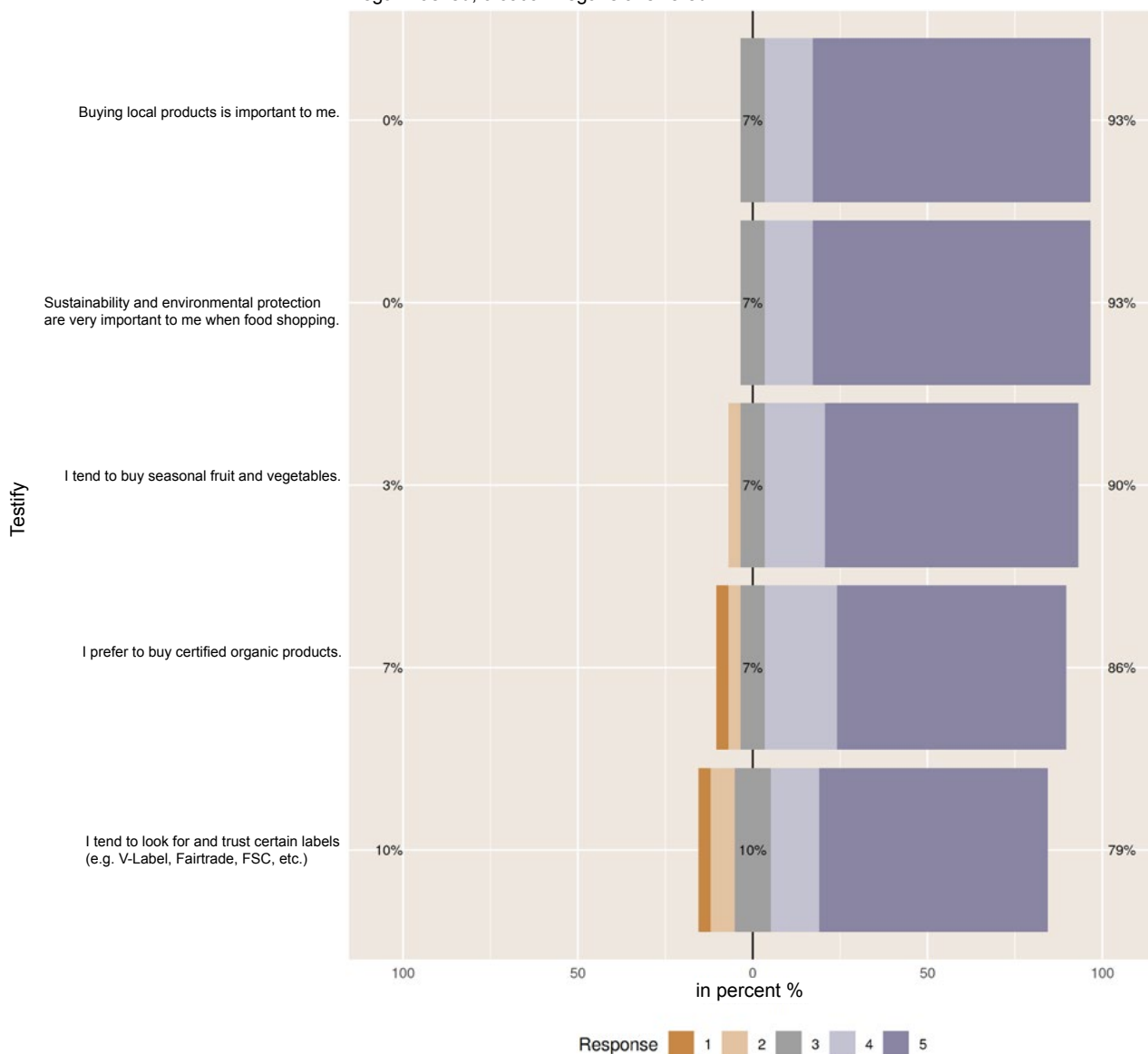


Source: VeganZ Nutrition Survey

To what extent do the following statements describe you?

Scale from 1 "Totally agree" to 6 "Totally disagree"

Veganz asked, croatian vegans answered.

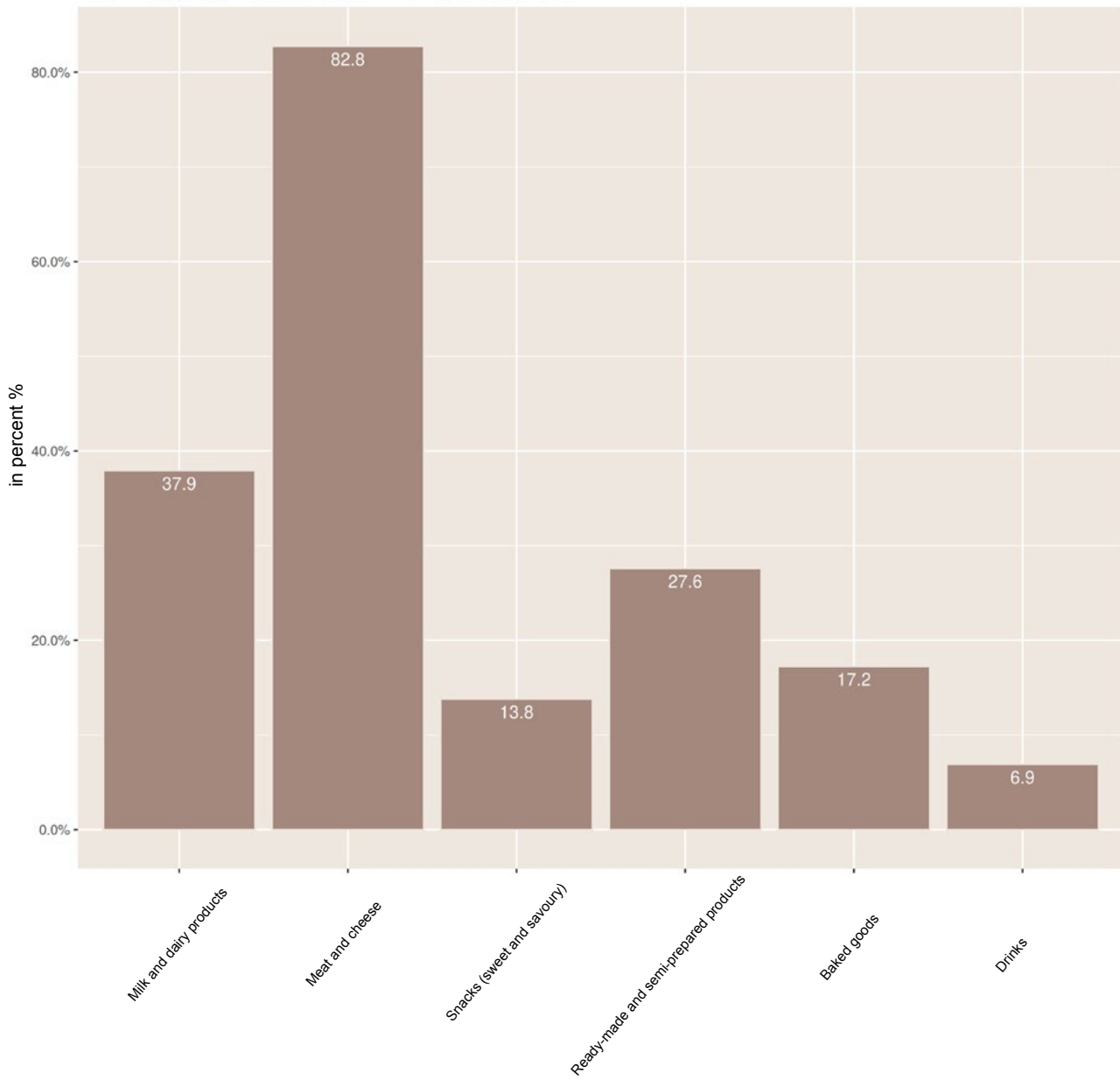


Source: Veganz Nutrition Survey

CROATIA

VEGAN

What type of vegan alternatives would you like to see more of?
Vegan asked, croatian vegans answered.

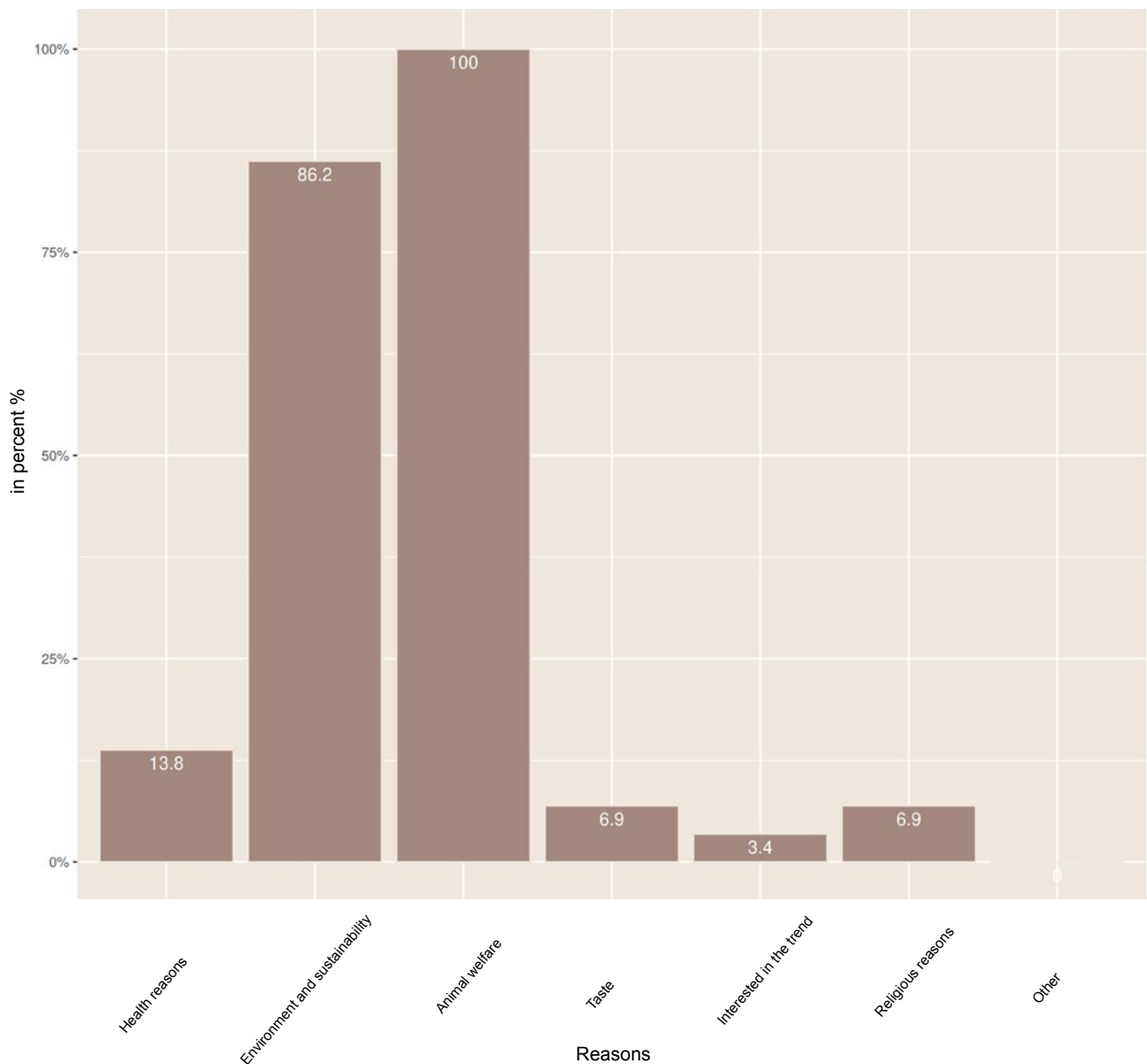


Media

Source: Veganz Nutrition Survey

What are your reasons for eating vegan?

Veganz asked, croatian vegans answered.

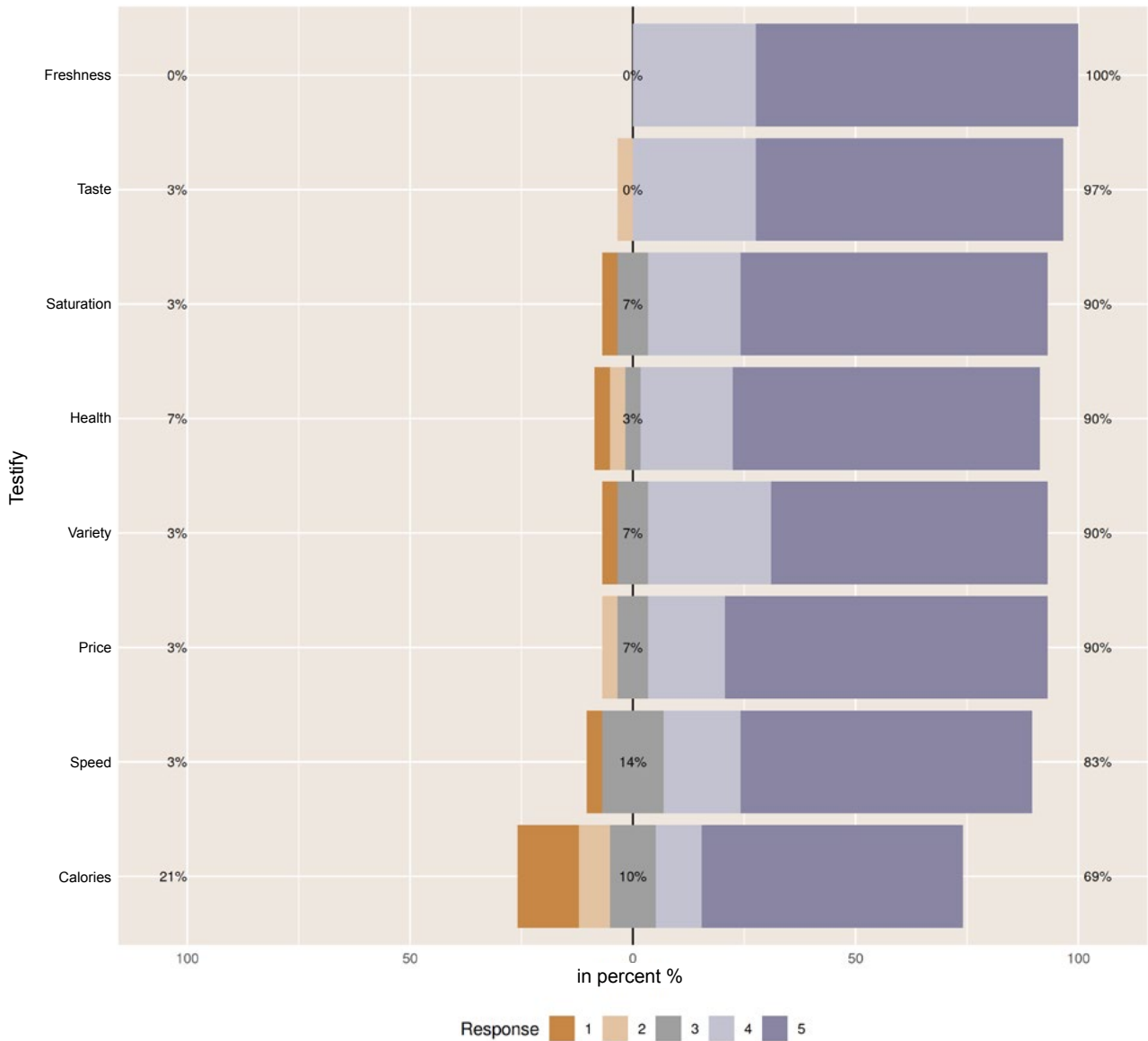


Source: Veganz Nutrition Survey

CROATIA

VEGAN

How important are the following factors to you when it comes to food?
 Scale of 1 "Very important" to 6 "Completely unimportant"
 Veganz asked, croatian vegans answered.



Source: Veganz Nutrition Survey

NETHERLANDS

Most of the Dutch surveyed said they had an average monthly income of 2.000 - 3.000 €. The distribution of income is relatively even, with only a few earning more than € 4,000 a month. Of the Dutch vegans interviewed, almost 96 % said they did so for animal welfare reasons, a further 82 % would like to protect the environment by eating vegan food in a sustainable way, and about half see it as a health benefit.

Essential differences appear in the cooking habits between vegans and the other nutritional groups. More than half of Dutch vegans cook for themselves daily while about 44 % say they cook 5 to 6 times a week. Non-vegans cook 5 to 6 times a week. 4 % eat their meals less than once a week in their own kitchen.

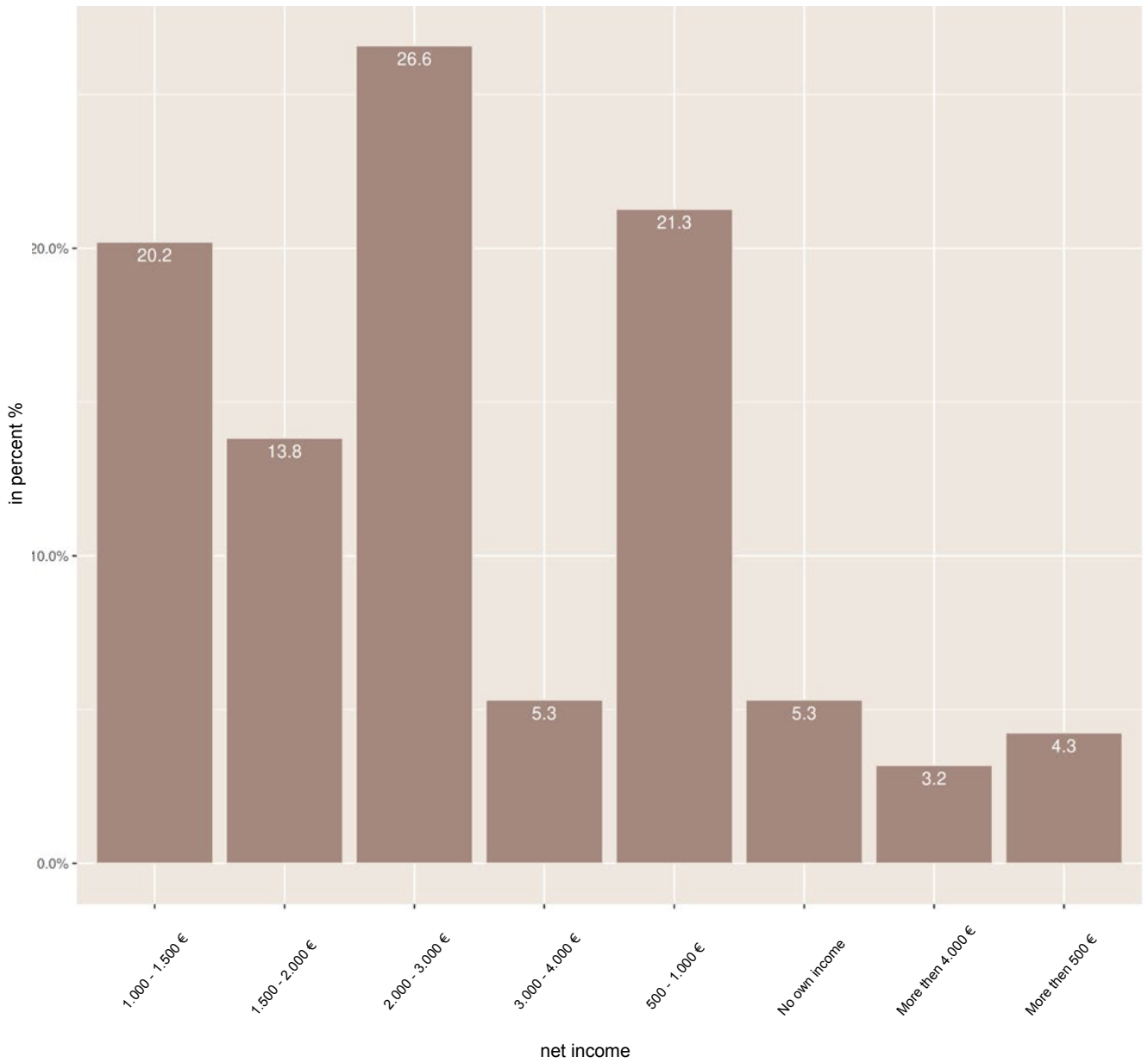
Generally speaking, Dutch participants prefer social media platforms for information on the latest dietary trends and product innovations. In addition to other online blogs and social exchange, direct information in the supermarket is also important. In the Netherlands, non-vegans also place a relatively high value on magazines and newspapers and almost 15 % said they don't inform themselves at all. In addition to the supermarket, health food stores

are also a popular shopping destination for almost 70 % of vegans - 30 % more than with the other food groups. Purchasing food at a drug store is hardly a viable option for those surveyed. Dutch vegans prefer the weekly markets more than anything.

For almost all Dutch vegans, flavour and quality are important criteria when purchasing plant-based food. In regard to certified organic products, opinions differ regarding innovation and regionality of the products. There is an increased aversion put on the importance of brand-name products. Almost every Dutch vegan wants more options in the baked goods section and according to 56.5 % of those surveyed, there is a lack of plant-based alternatives to cured meats and cheese.

When it comes to general purchasing behaviour, all food groups are similar in their actions and focus above all on sustainability and environmental protection, although this opinion is more strongly represented among vegans. Regionality plays a role for less than half of the respondents. In addition, non-vegans rely less on certified organic products than vegans.

What is your net monthly income?
Veganz asked, dutch answered.

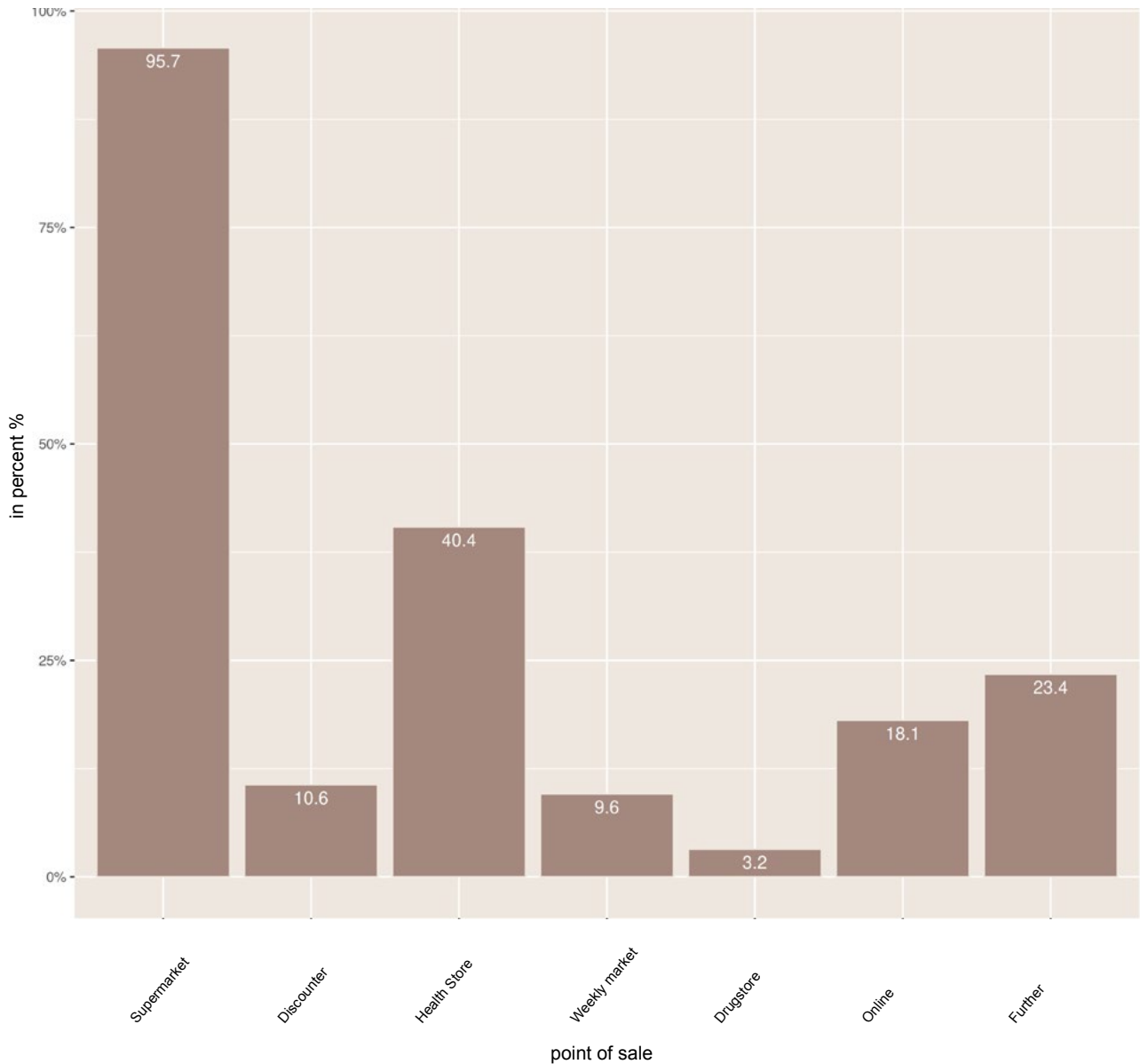


Source: Veganz Nutrition Survey

NETHERLANDS

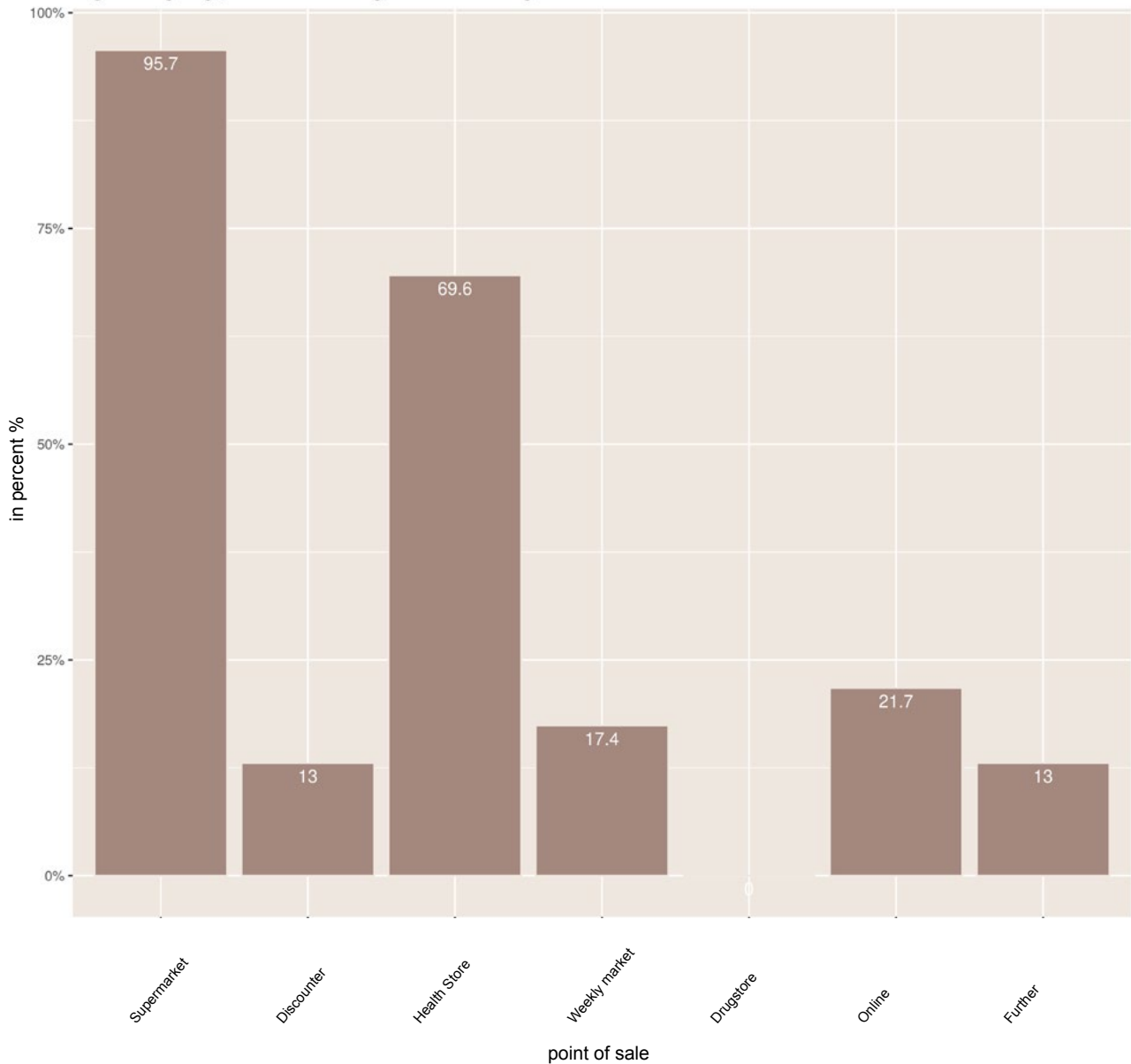
NON-VEGAN

Where do you buy food?
Veganz asked, dutch non-vegans answered.



Source: Veganz Nutrition Survey

Where do you buy food?
Veganz asked, dutch vegans answered.

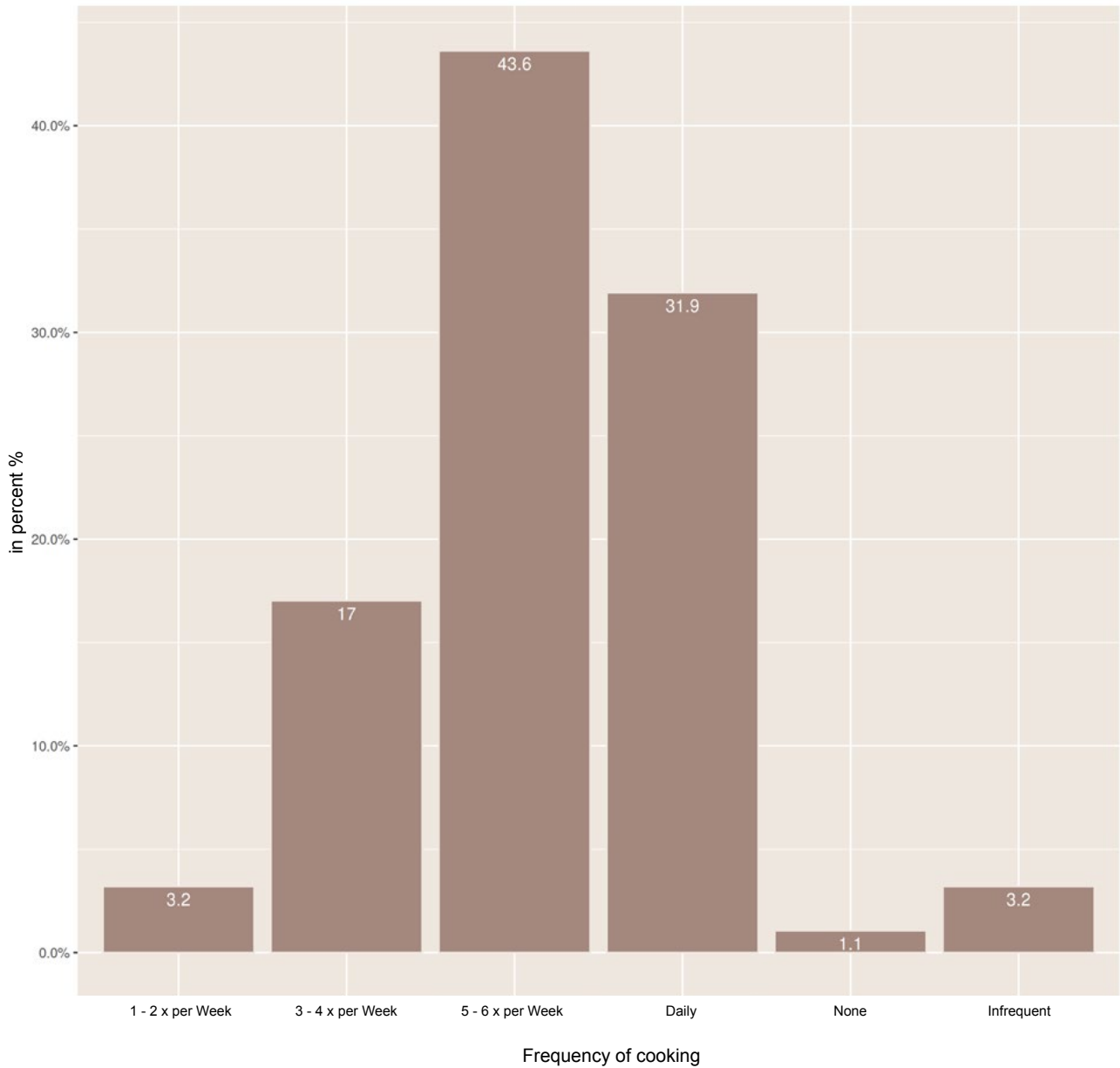


Source: Veganz Nutrition Survey

NETHERLANDS

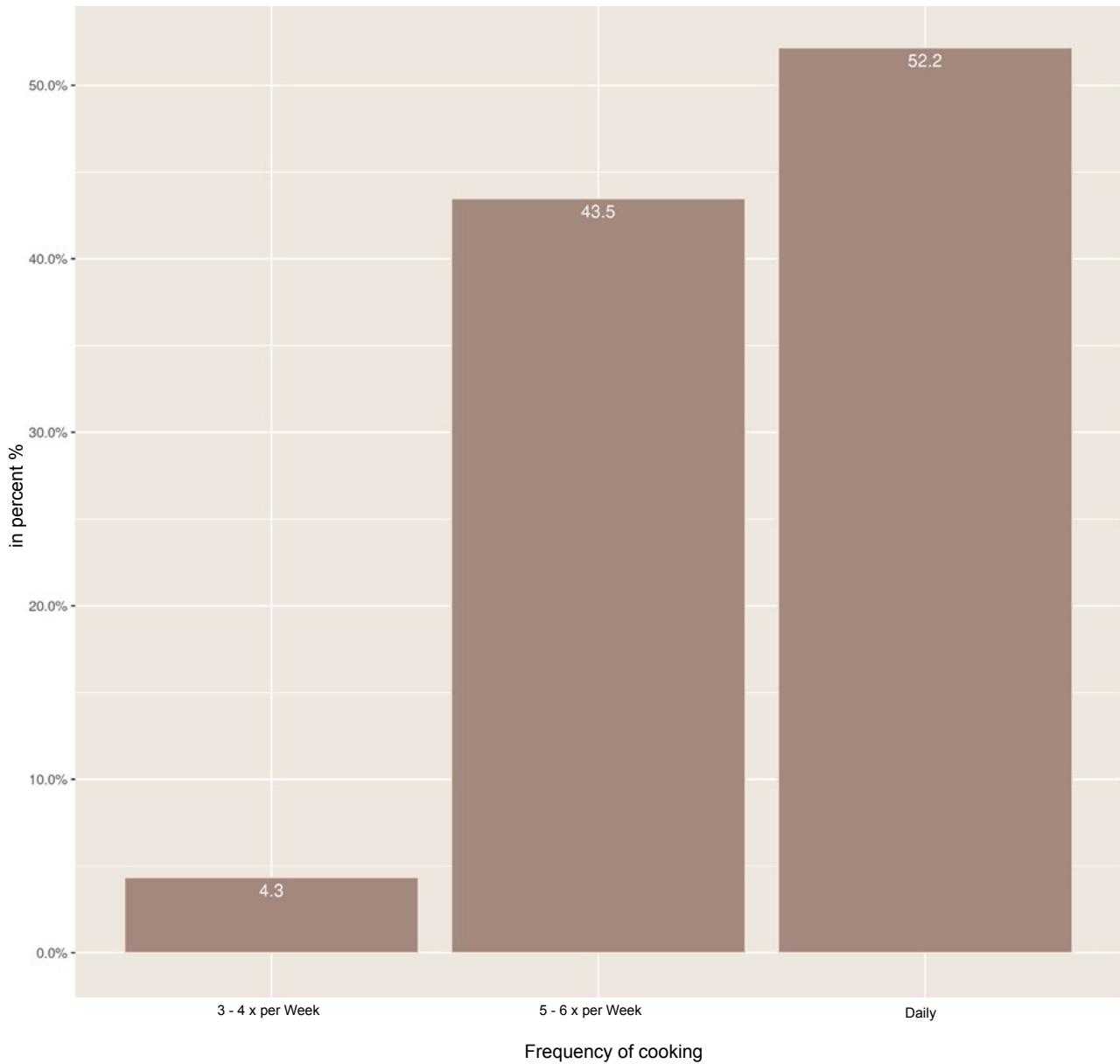
NON-VEGAN

How often do you cook?
VeganZ asked, dutch non-vegans answered.



Source: VeganZ Nutrition Survey

How often do you cook?
Veganz asked, dutch vegans answered.

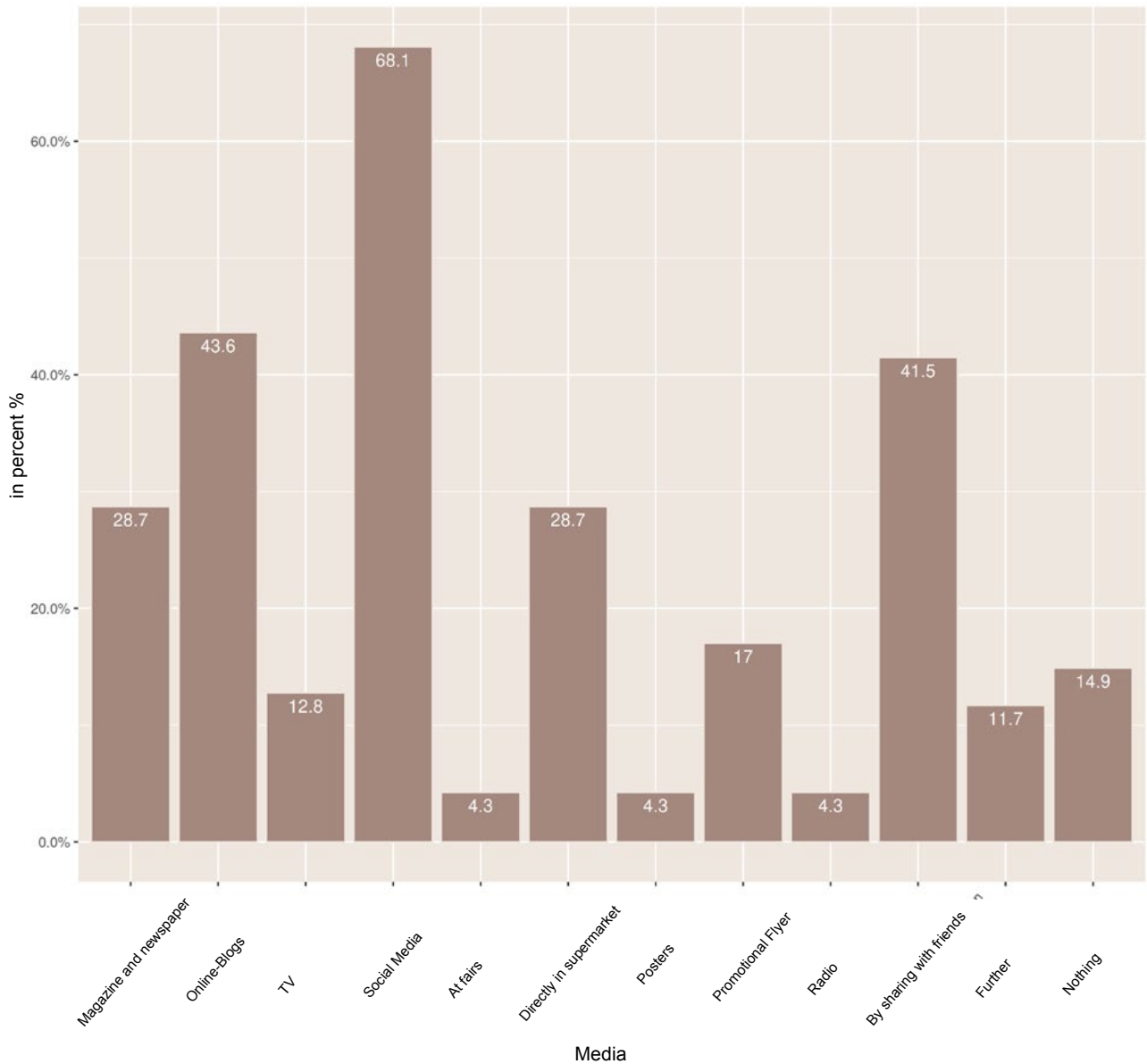


Source: Veganz Nutrition Survey

NETHERLANDS

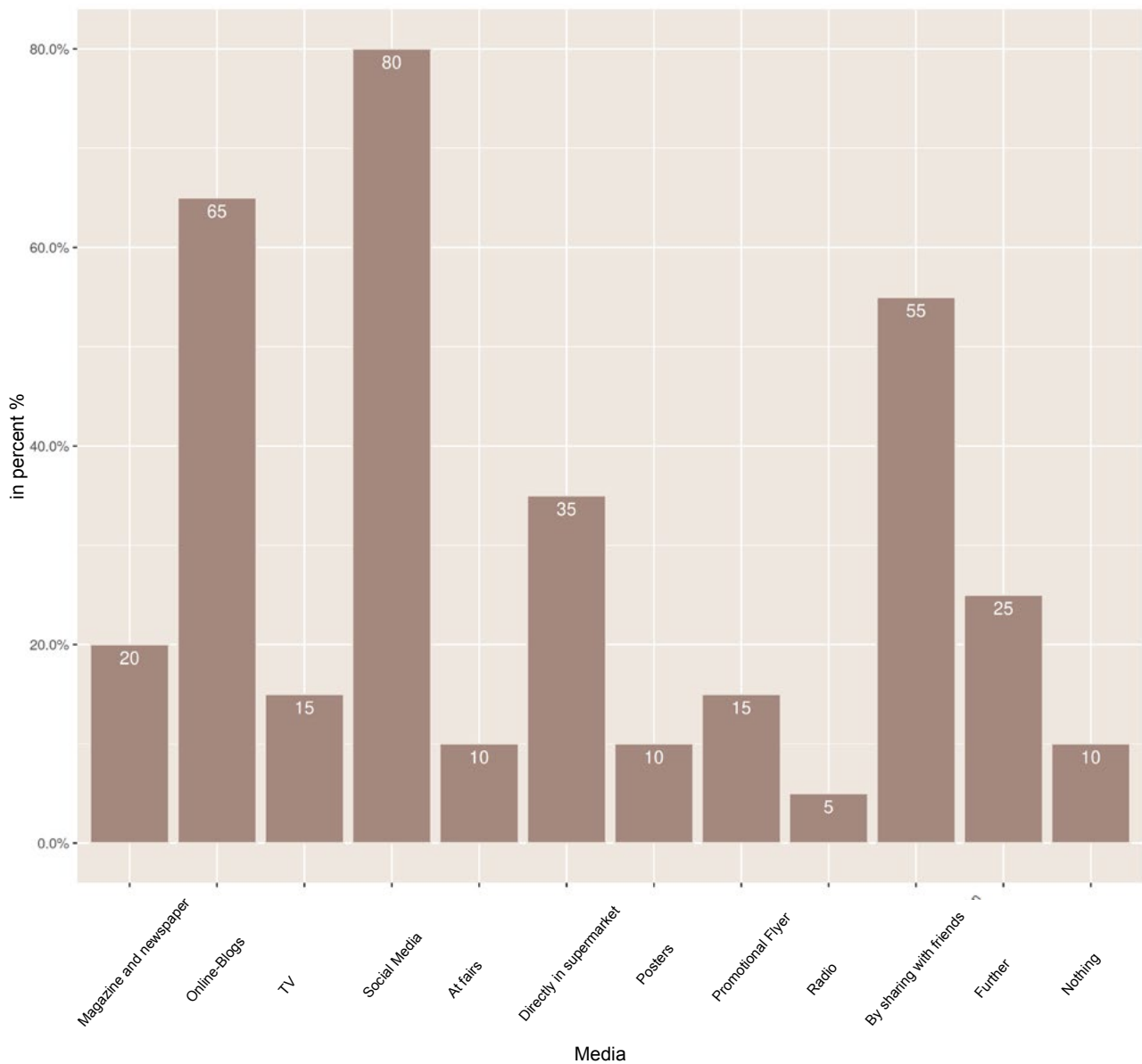
NON-VEGAN

Where do you find information about dietary trends and product innovations?
 Veganz asked, dutch non-vegans answered.



Source: Veganz Nutrition Survey

Where do you find information about dietary trends and product innovations?
Veganz asked, dutch vegans answered.

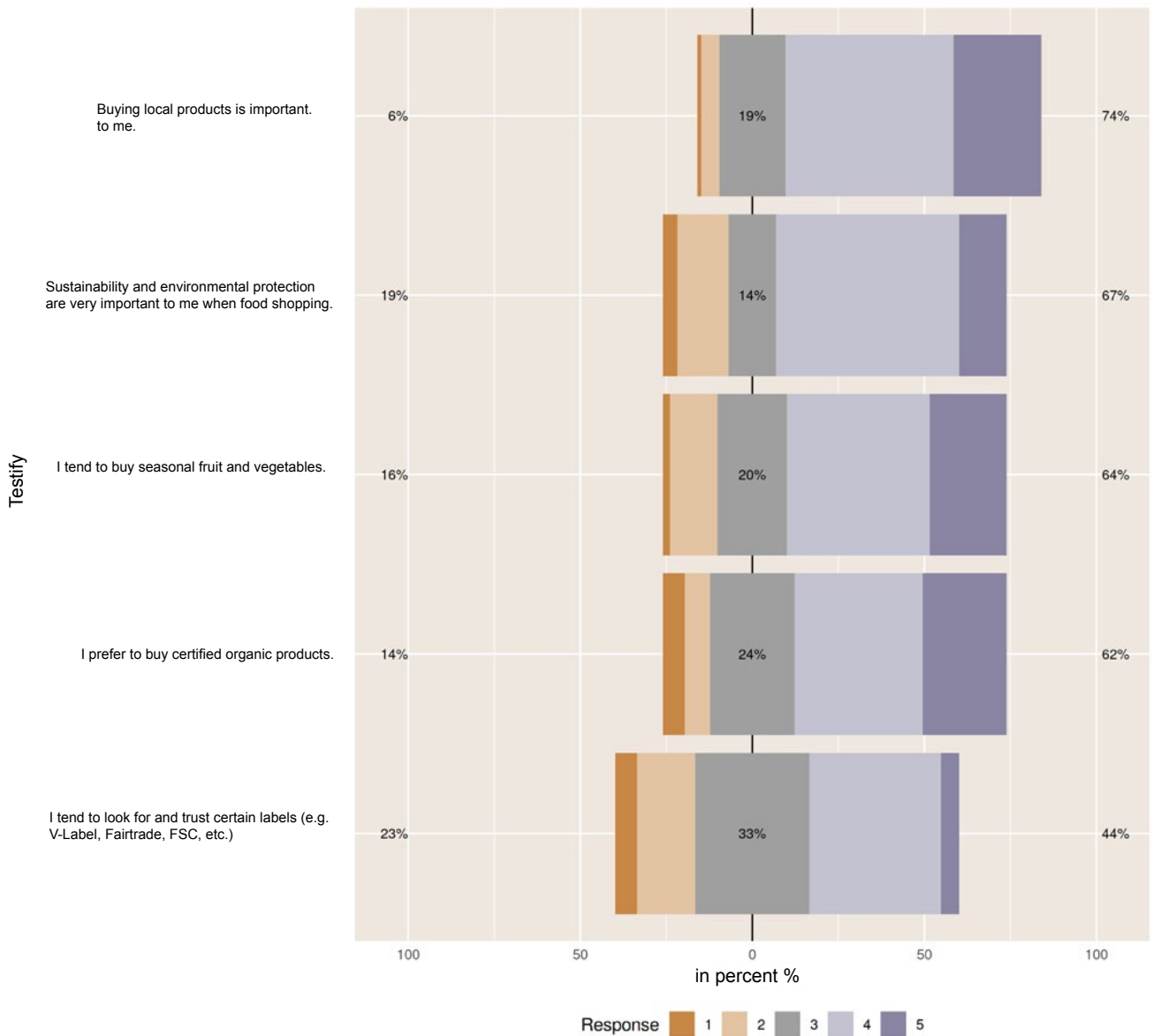


Source: Veganz Nutrition Survey

NETHERLANDS

NON-VEGAN

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 Veganz asked, dutch non-vegans answered.

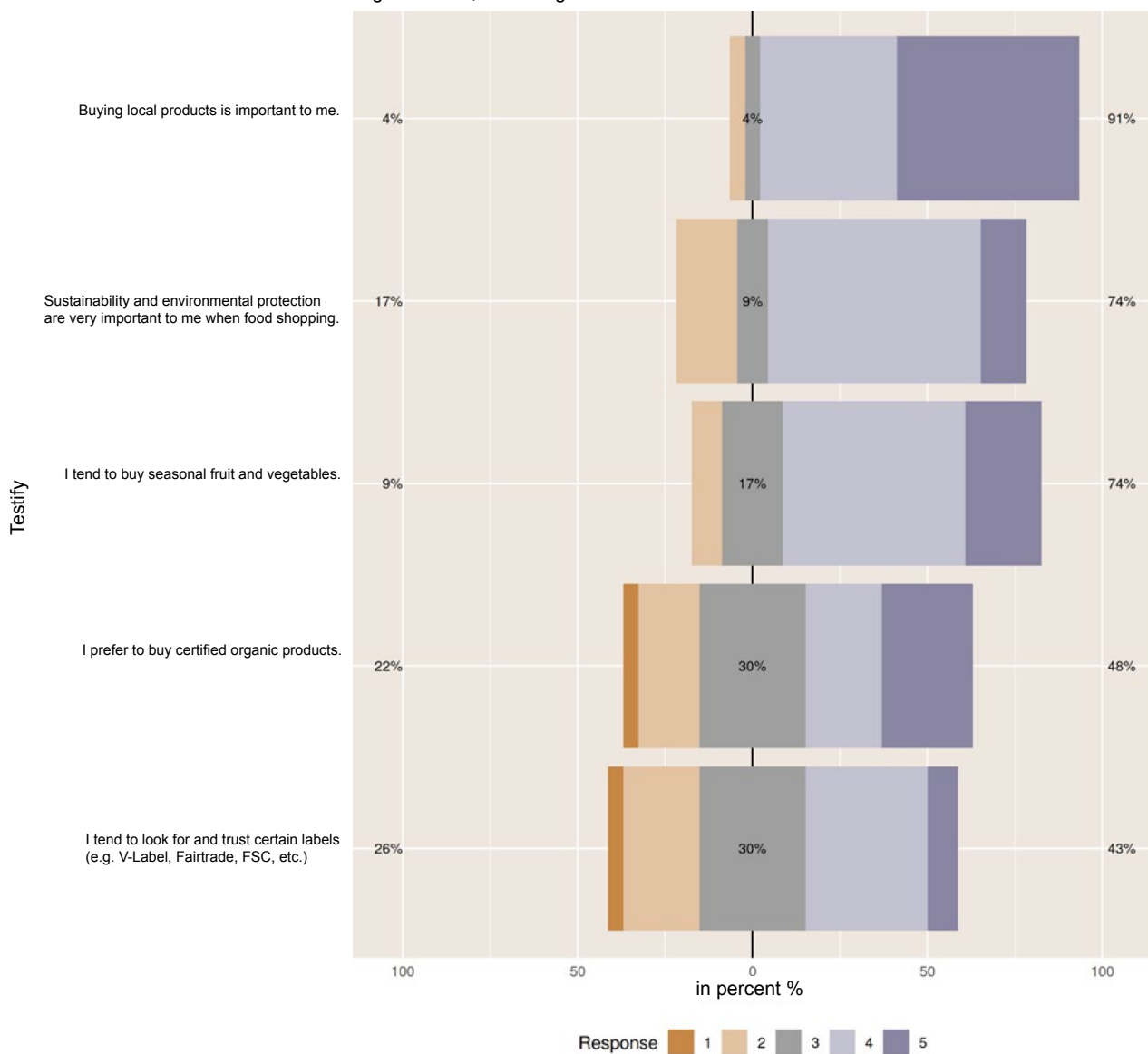


Source: Veganz Nutrition Survey

To what extent do the following statements describe you?

Scale from 1 "Totally agree" to 6 "Totally disagree"

Veganz asked, dutch vegans answered.

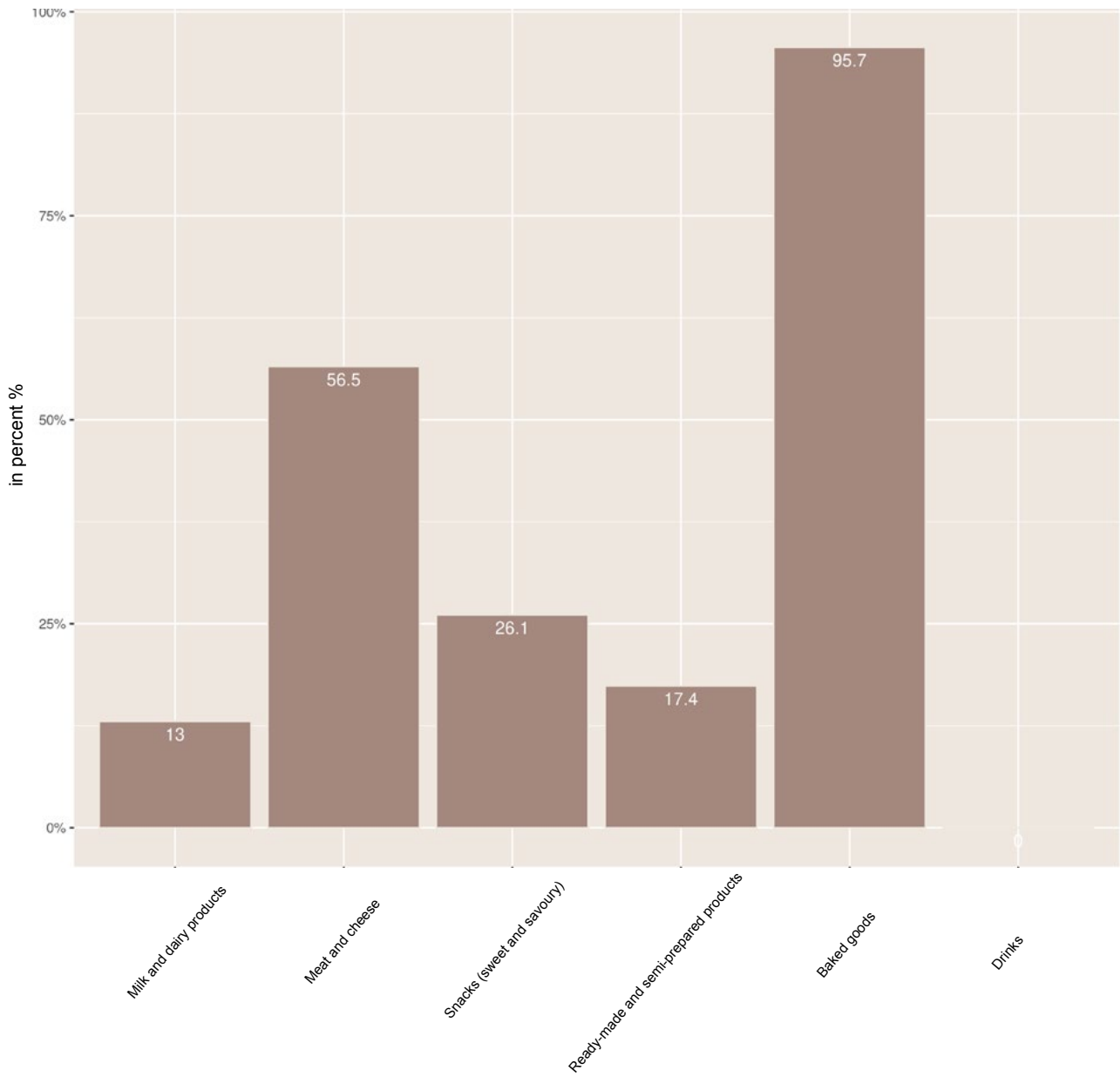


Source: Veganz Nutrition Survey

NETHERLANDS

VEGAN

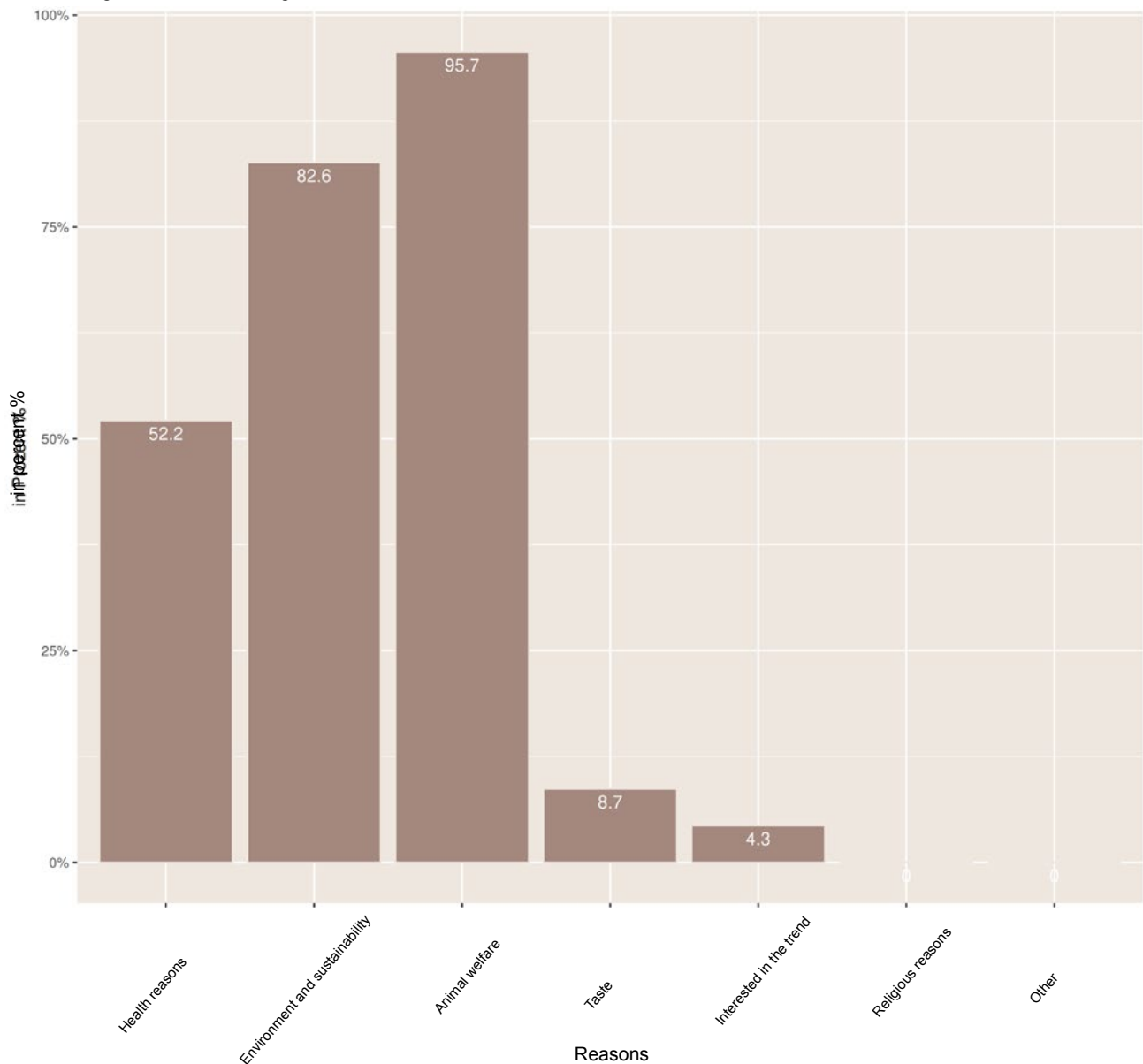
What type of vegan alternatives would you like to see more of?
Veganz asked, dutch vegans answered.



Media

Source: Veganz Nutrition Survey

What are your reasons for eating vegan?
Veganz asked, dutch vegans answered.

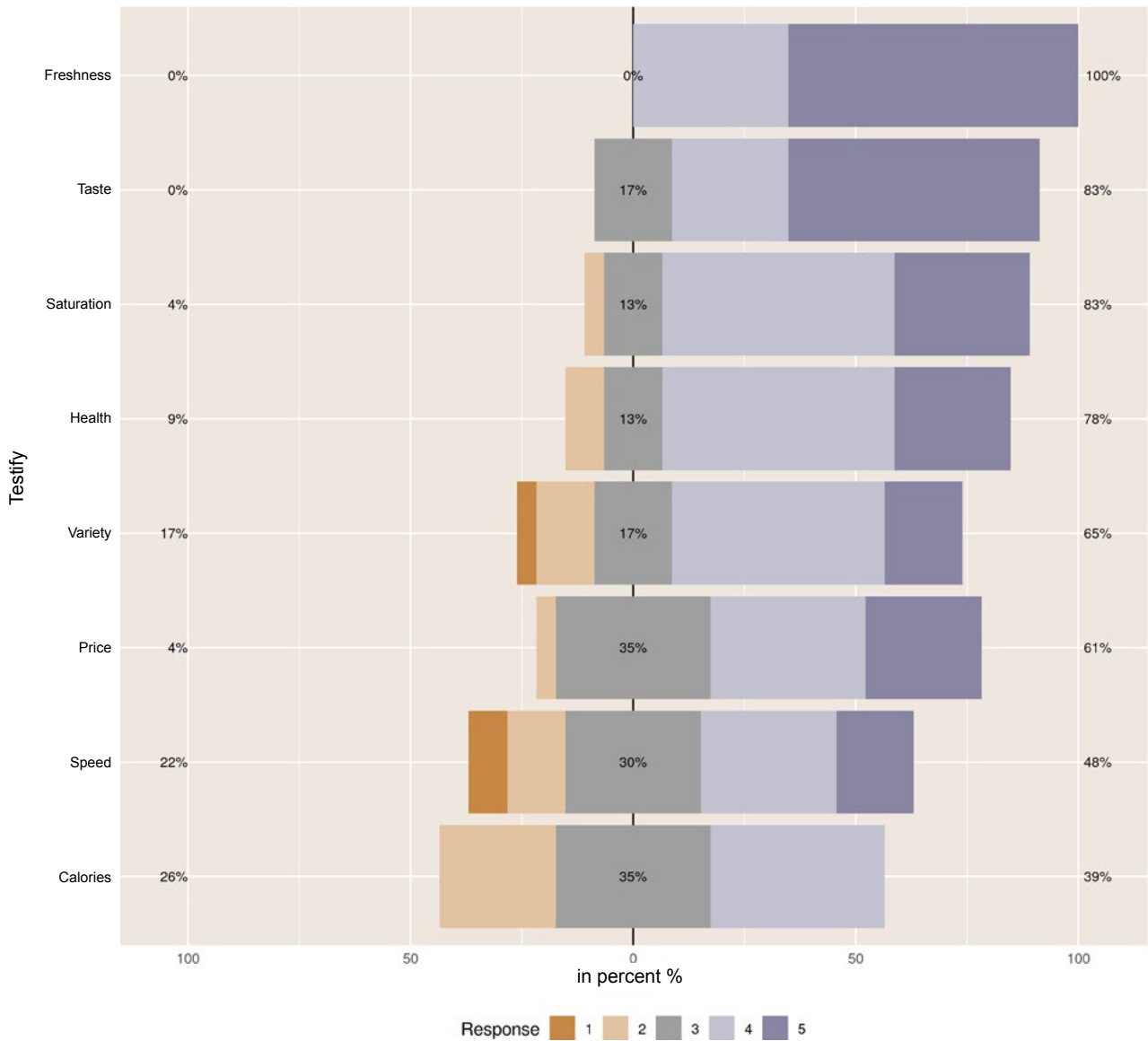


Source: Veganz Nutrition Survey

NETHERLANDS

VEGAN

How important are the following factors to you when it comes to food?
 Scale of 1 "Very important" to 6 "Completely unimportant"
 Veganz asked, dutch vegans answered.



Source: Veganz Nutrition Survey

POLAND

The average monthly net income in Poland falls into the lower range. 39,4 % of the Poles surveyed said they earned between 500 - 1.000 € a month. A further 18,8 % is somewhere between 1.000 und 1.500 €. Almost 15 % said they had less than 500 € a month at their disposal.

93,9 % of Polish vegans said they were plant-based eaters because of the animals. In addition, 81,6 % said their motivation is environmental protection and 55,1 % don't consume animal products for health reasons. 16,3 % of Polish vegans justify their diet with preference based on taste.

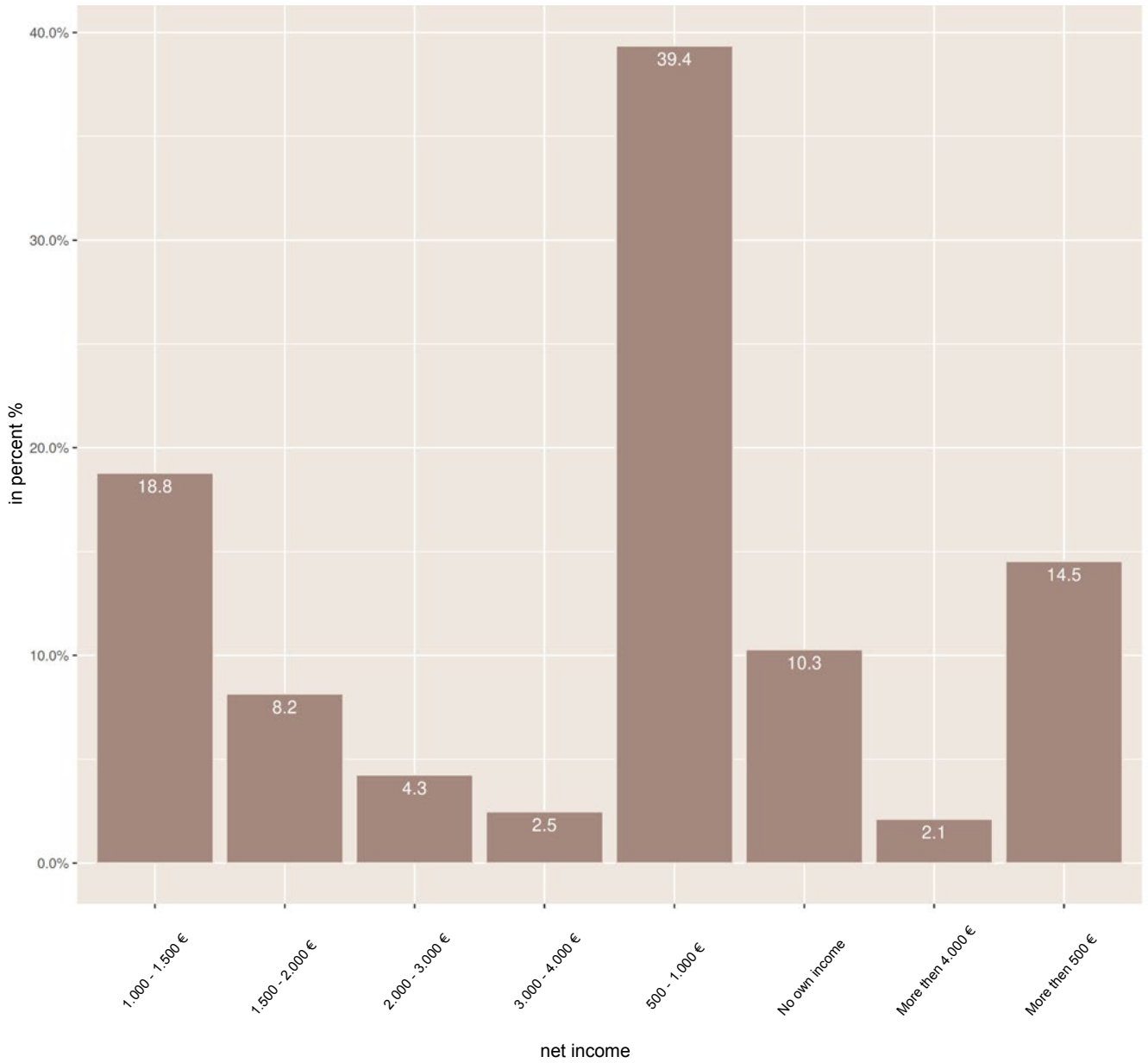
The willingness to cook is about the same between vegans and the other nutrition groups. About a third cook fresh every day and very few Polish respondents cook less than once or twice a week. When asked what types of media they use to inform themselves about nutrition trends and product innovations, the Polish vegans interviewed had clear preferences: social media, online blogs and direct exchange with friends. For these nutrition groups, flyers and TV are out of the question. Preferences are somewhat more dispersed among the other food groups, which also include magazines and newspapers as well as trade fairs, supermarket visits

and television in their choice of media. With respect to shopping preferences, there is little different between Polish vegans and non-vegans. Although vegans utilise online shopping and visit health food stores more frequently.

The majority of Polish participants buy their food at supermarkets. For vegans, the quality aspect of their food is very important. Flavour, sustainability and freshness also play an important role. Many vegans in Poland are undecided about transparency/traceability, the certified organic label, regionality and degree of innovation. Less value is placed on vegan product brand recognisability.

Generally speaking, Polish vegans feel there is still a need to expand the plant-based assortment. Mainly in the area of baked goods, 57 % feel as if there aren't enough choices available. Vegan females show similar values to the other food groups in their general shopping behaviour. However, it is noticeable that organic certification and regionality are less important to Polish vegans than non-vegans. In addition, they place sustainability and environmental protection above seasonal fruit and vegetable produce. Non-vegans, on the other hand, are rated in the findings more or less equally.

What is your net monthly income?
Veganz asked, poland answered.

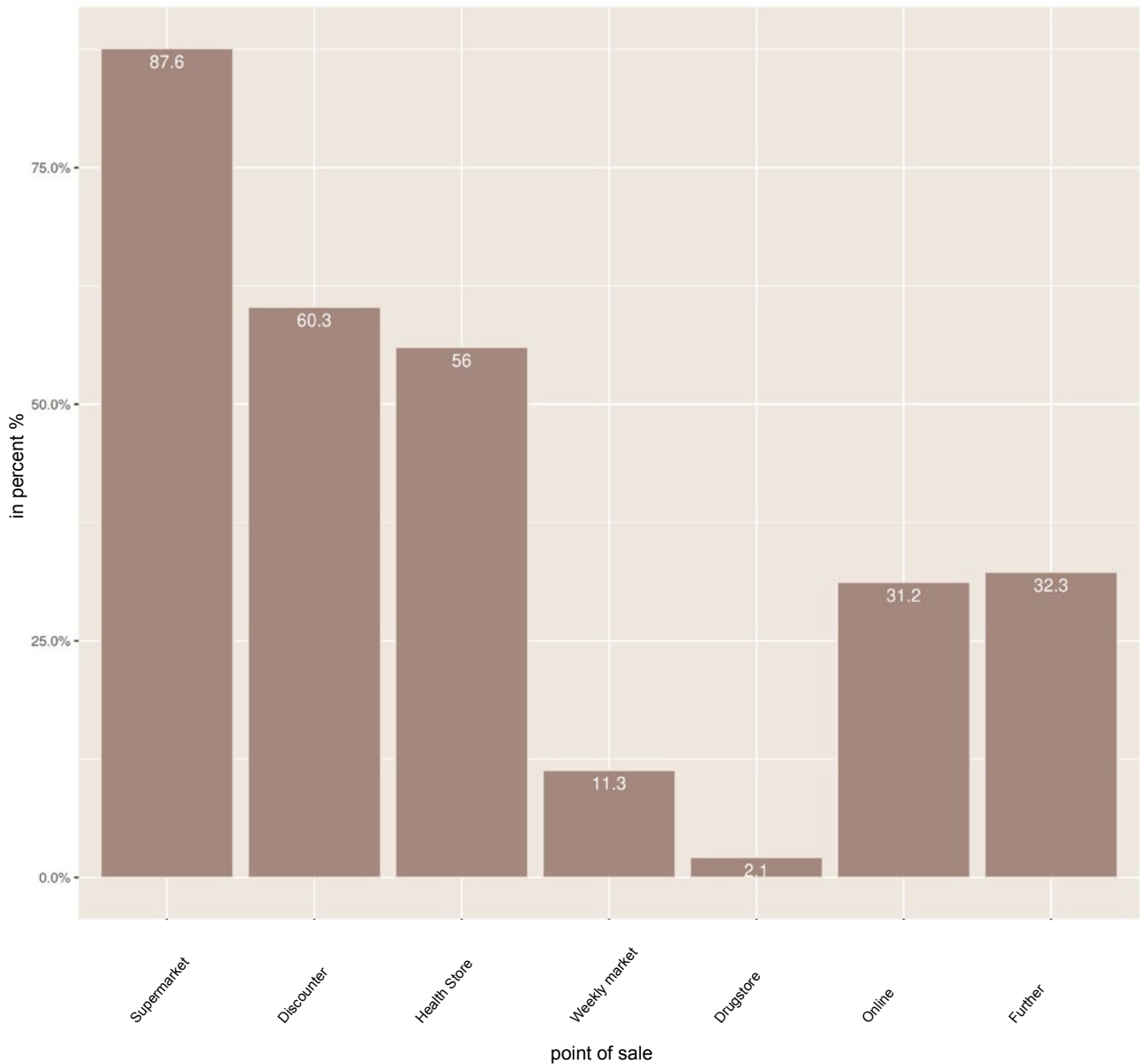


Source: Veganz Nutrition Survey

POLAND

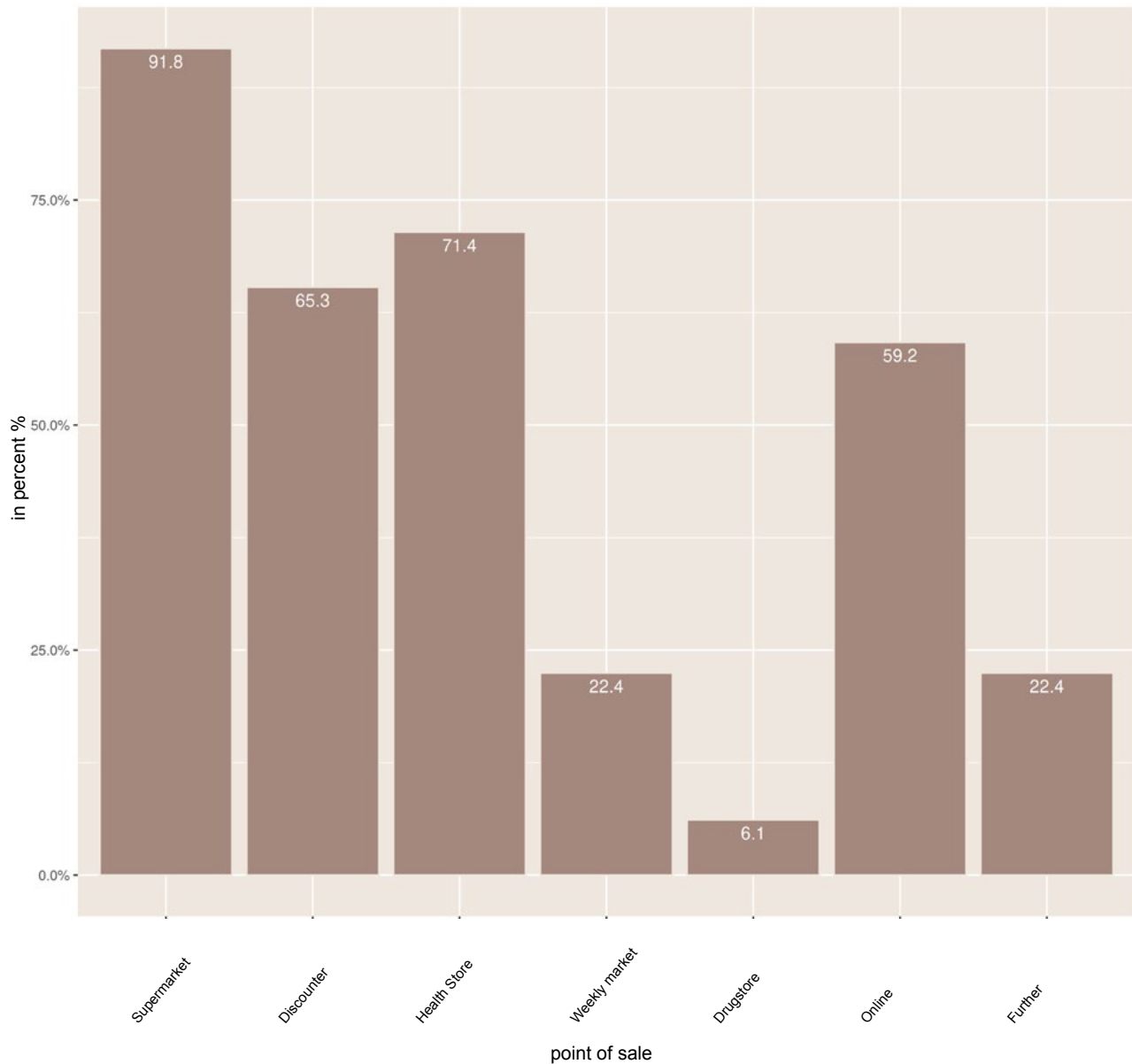
NON-VEGAN

Where do you buy food?
Veganz asked, poland non-vegans answered.



Source: Veganz Nutrition Survey

Where do you buy food?
Veganz asked, poland vegans answered.

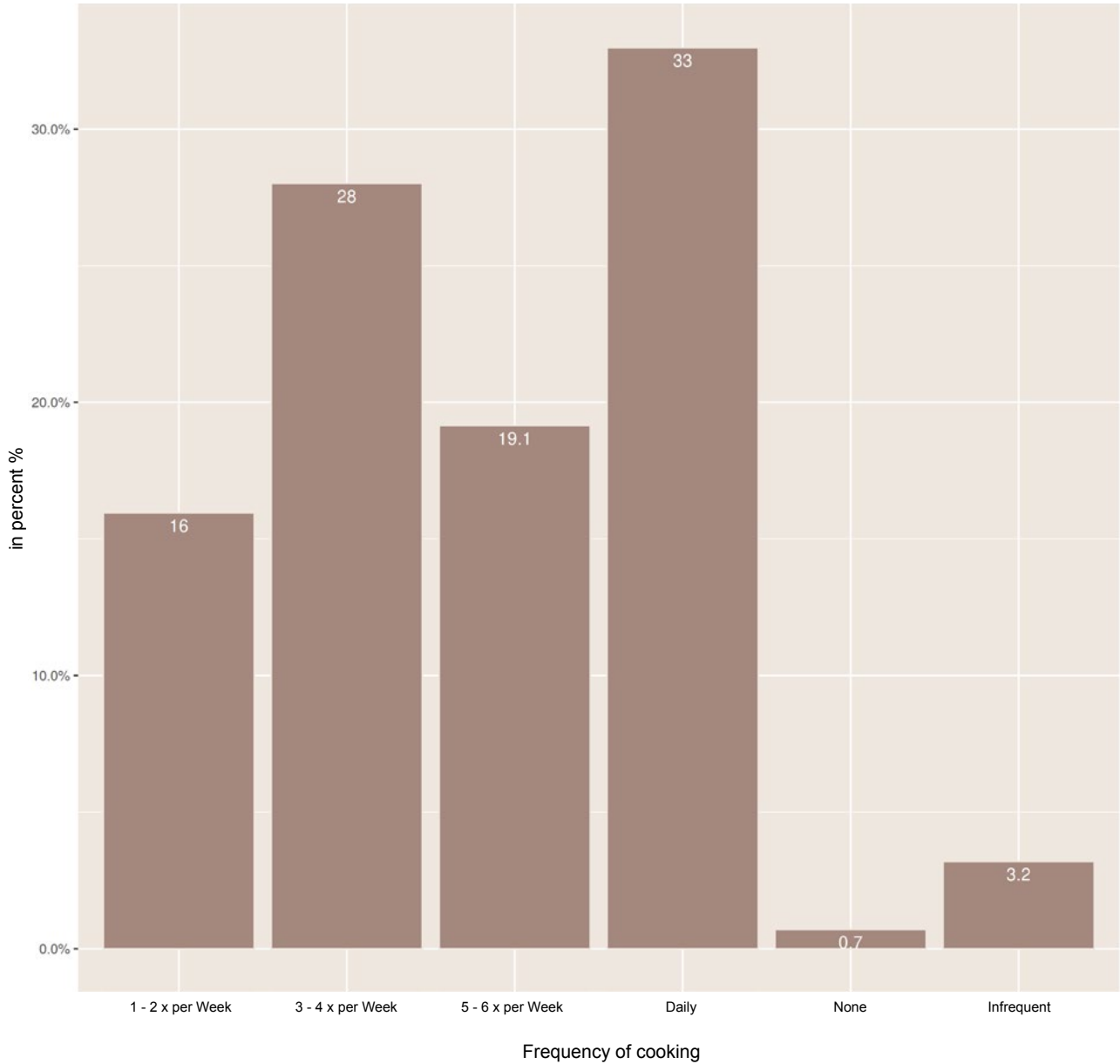


Source: Veganz Nutrition Survey

POLAND

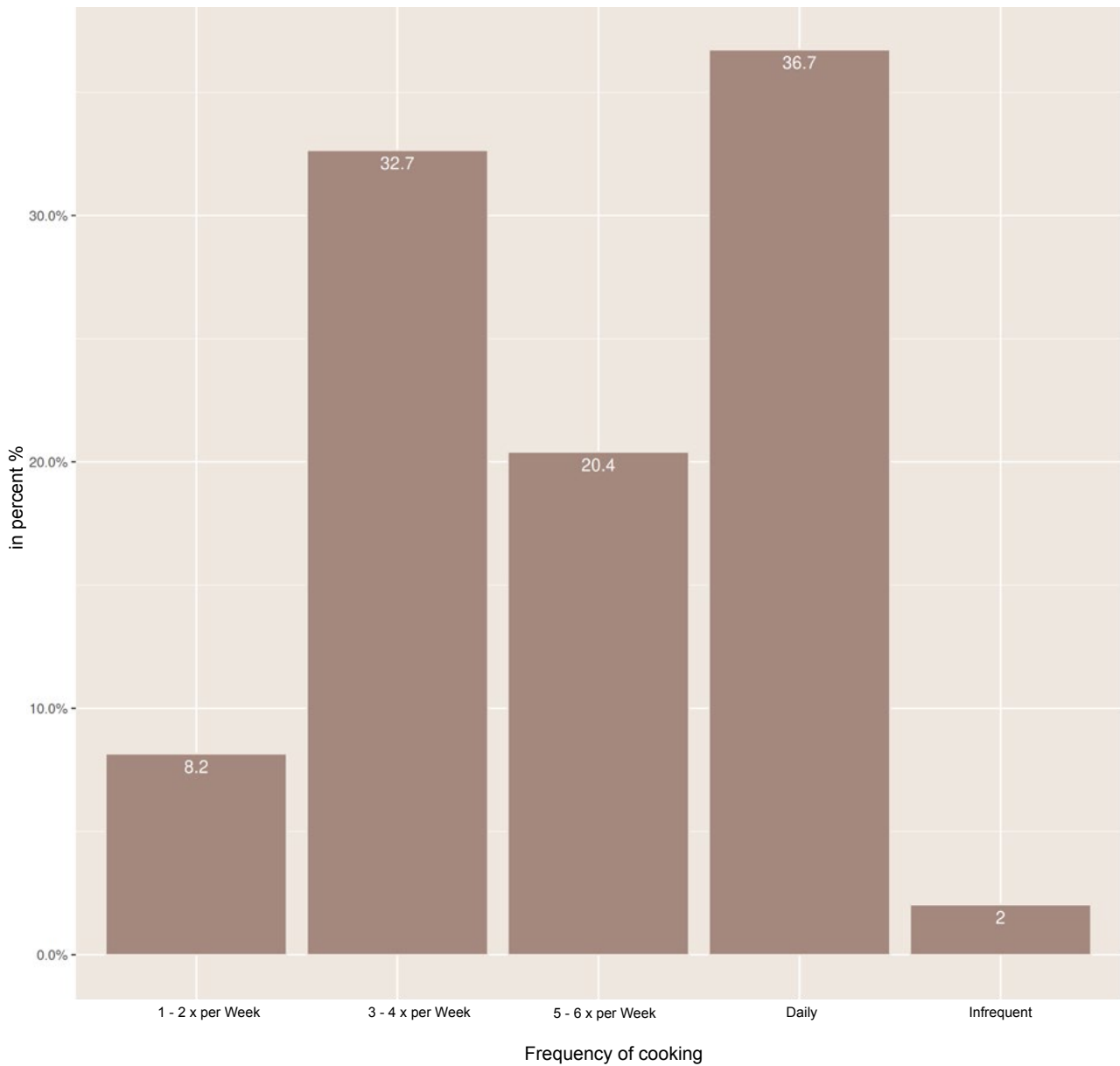
NON-VEGAN

How often do you cook?
Veganz asked, poland non-vegans answered.



Source: Veganz Nutrition Survey

How often do you cook?
Veganz asked, poland vegans answered.

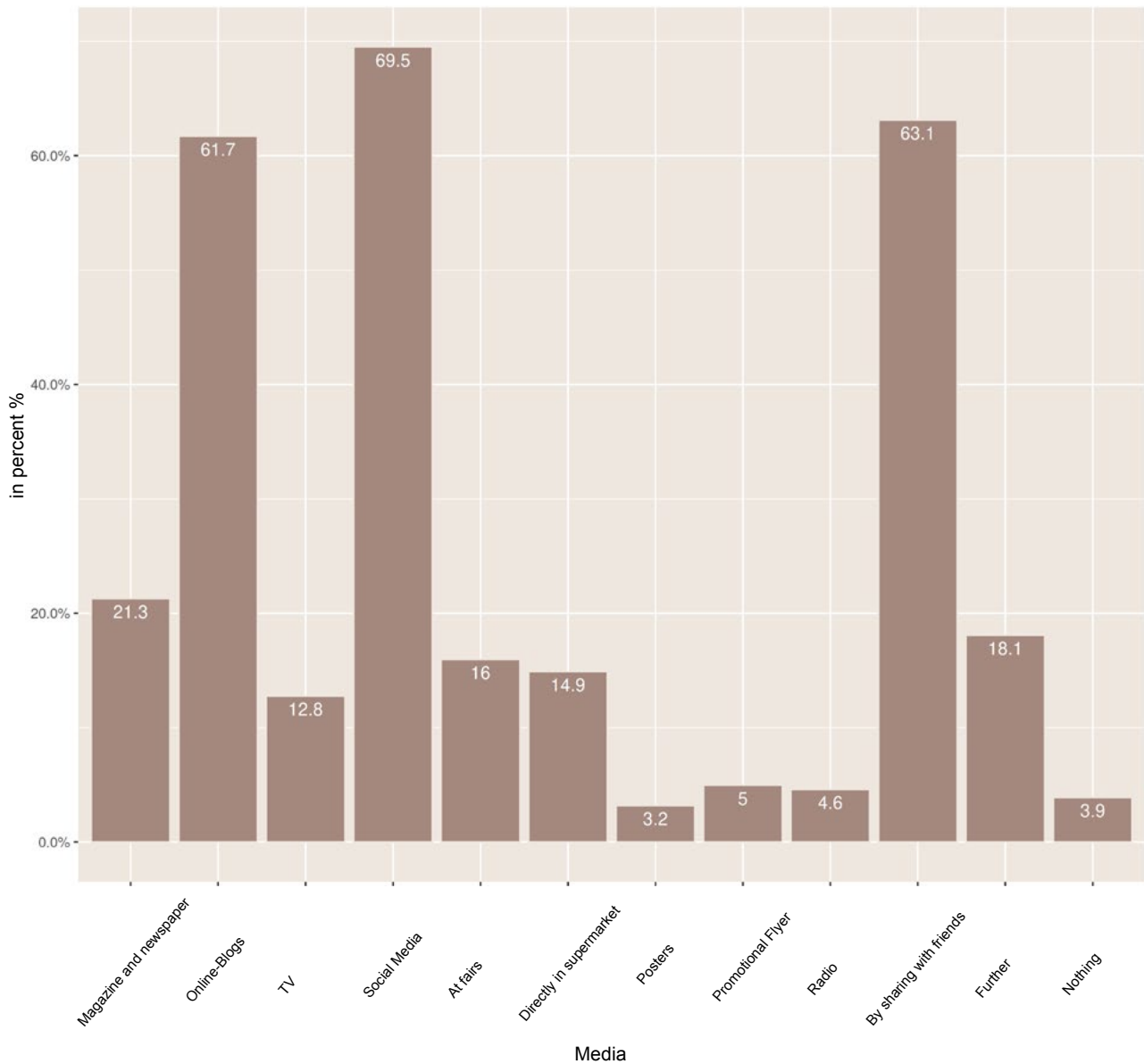


Source: Veganz Nutrition Survey

POLAND

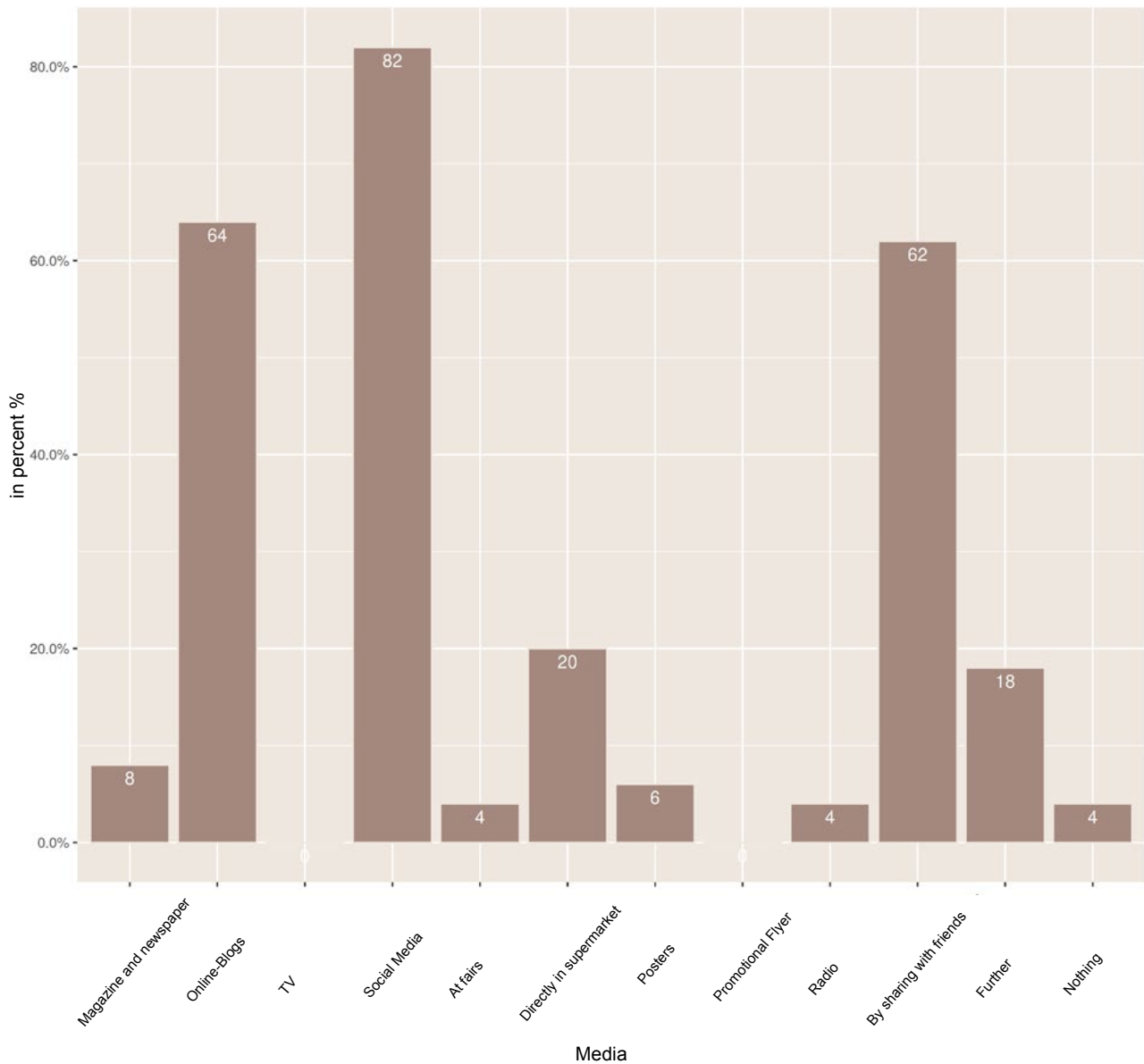
NON-VEGAN

Where do you find information about dietary trends and product innovations?
Veganz asked, poland non-vegans answered.



Source: Veganz Nutrition Survey

Where do you find information about dietary trends and product innovations?
Veganz asked, poland vegans answered.

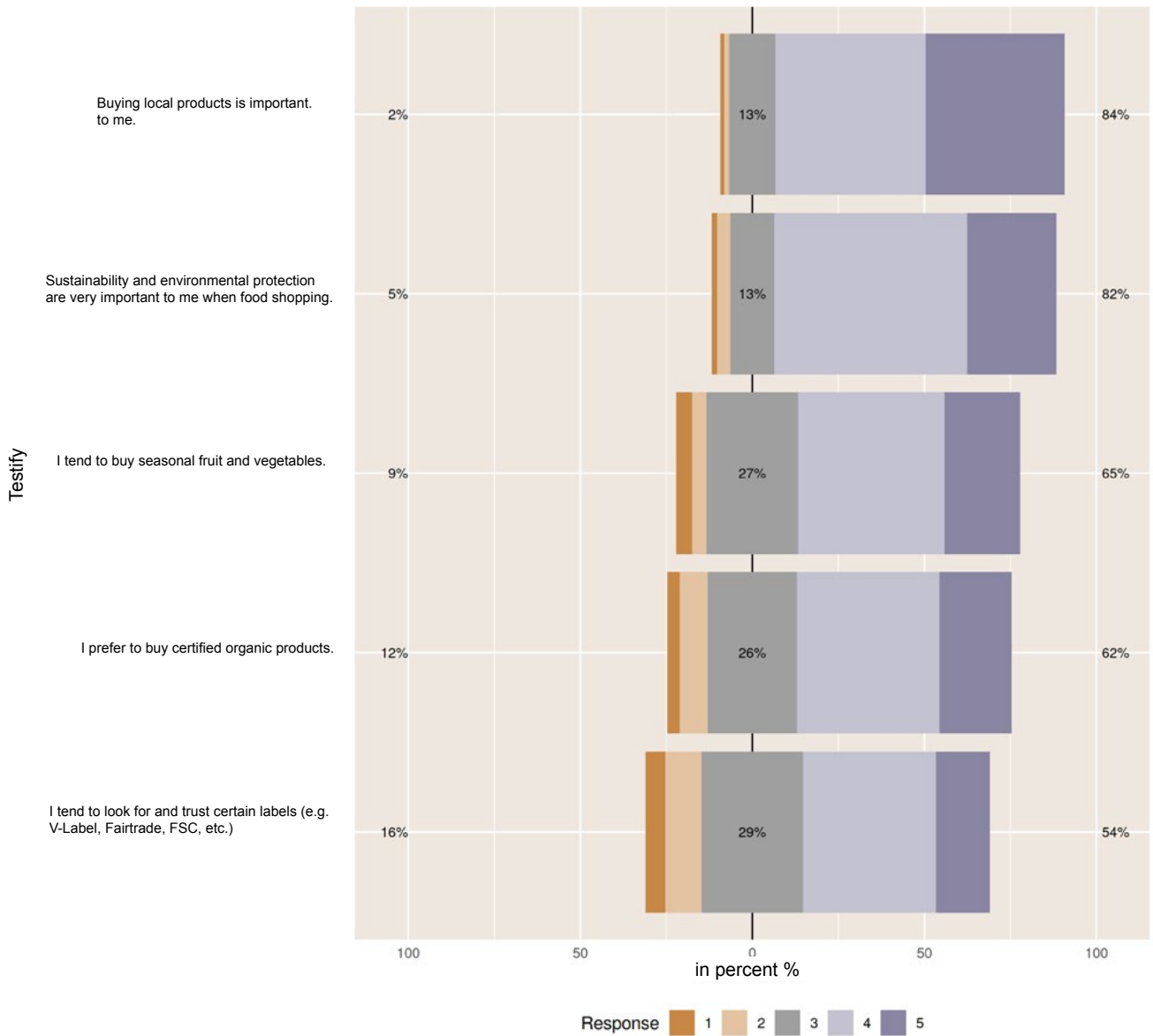


Source: Veganz Nutrition Survey

POLAND

NON-VEGAN

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 Veganz asked, poland non-vegans answered.

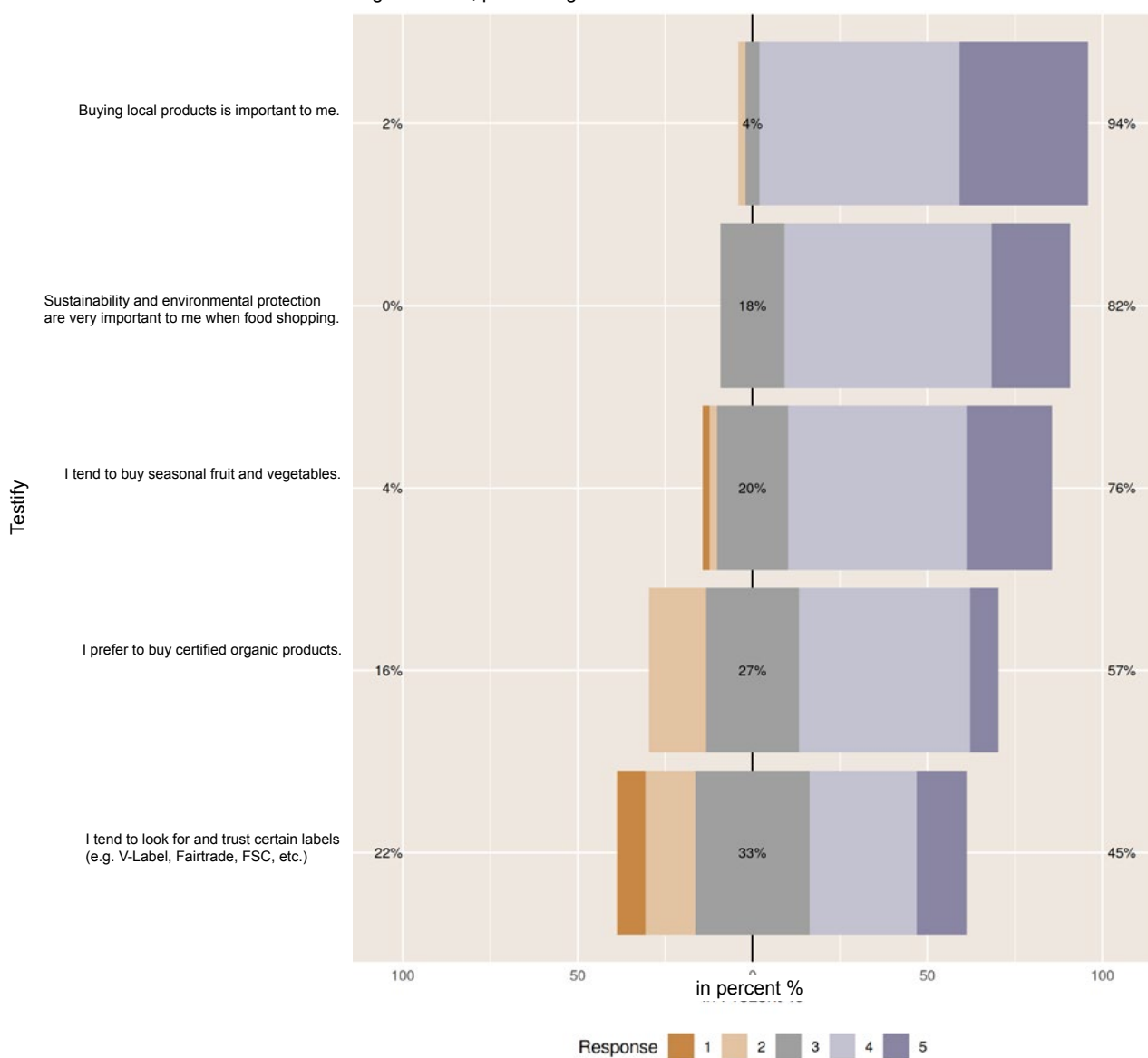


Source: Veganz Nutrition Survey

To what extent do the following statements describe you?

Scale from 1 "Totally agree" to 6 "Totally disagree"

Veganz asked, poland vegans answered.

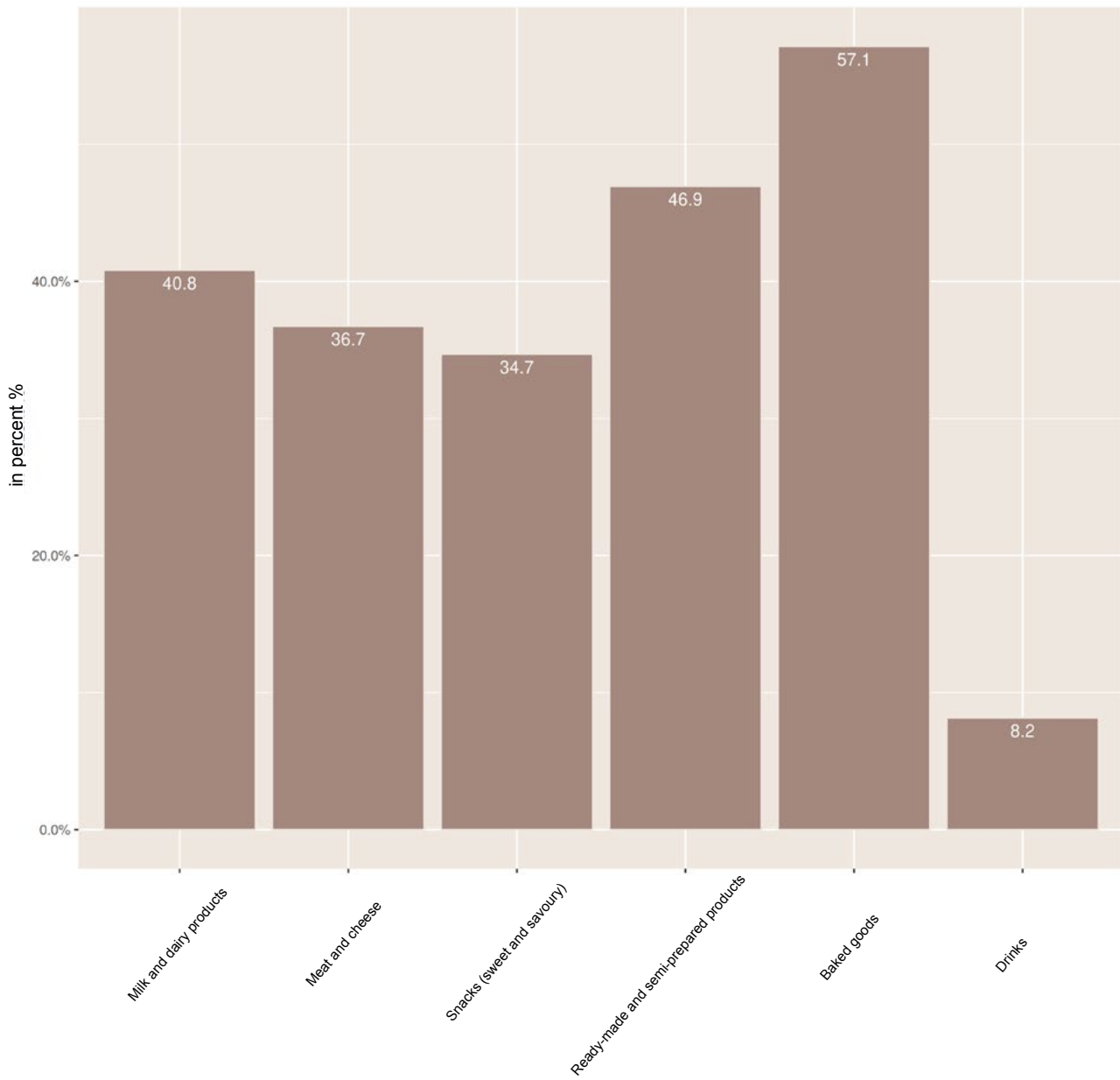


Source: Veganz Nutrition Survey

POLAND

VEGAN

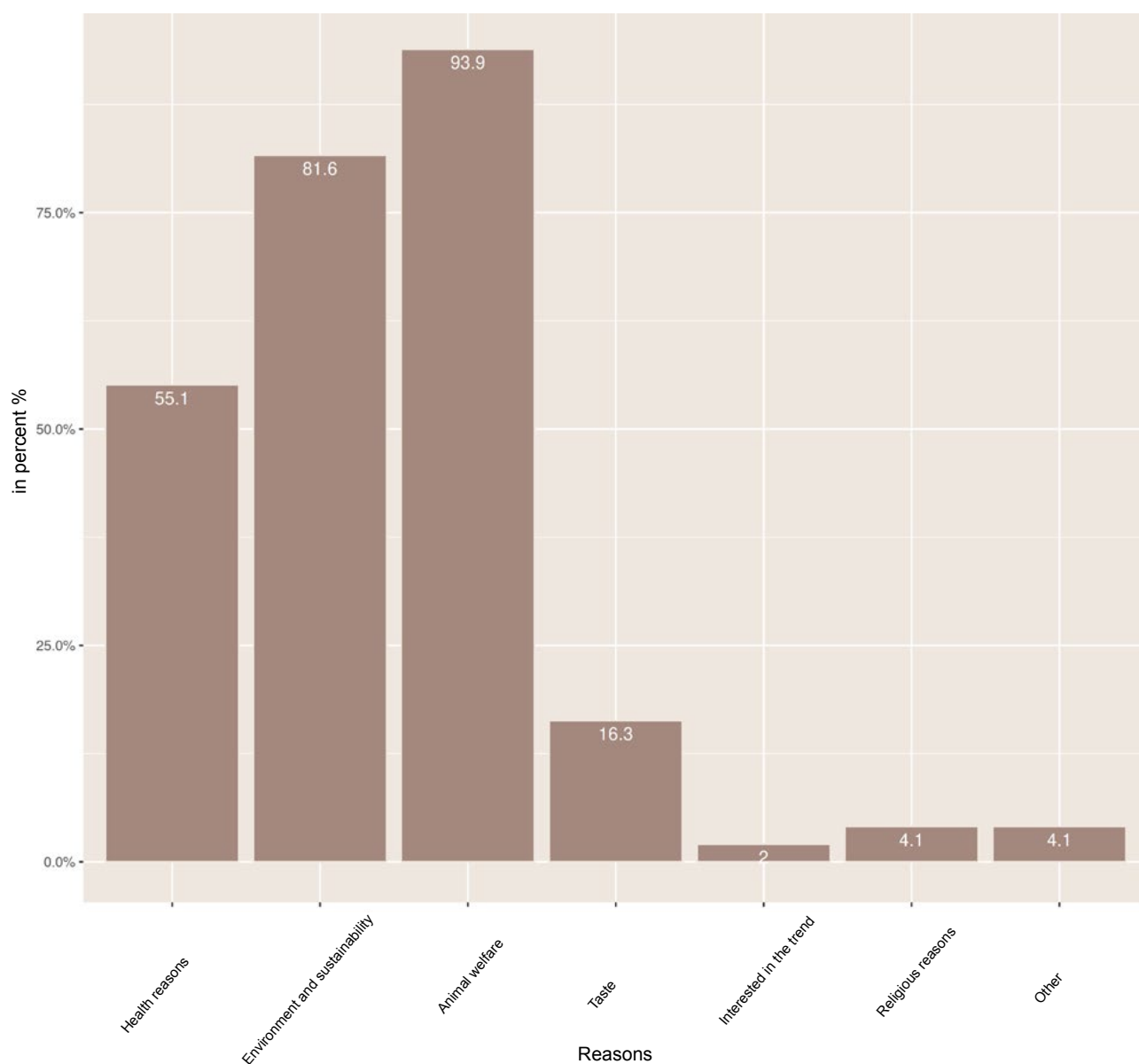
What type of vegan alternatives would you like to see more of?
Veganz asked, poland vegans answered.



Media

Source: Veganz Nutrition Survey

What are your reasons for eating vegan?
Veganz asked, poland vegans answered.

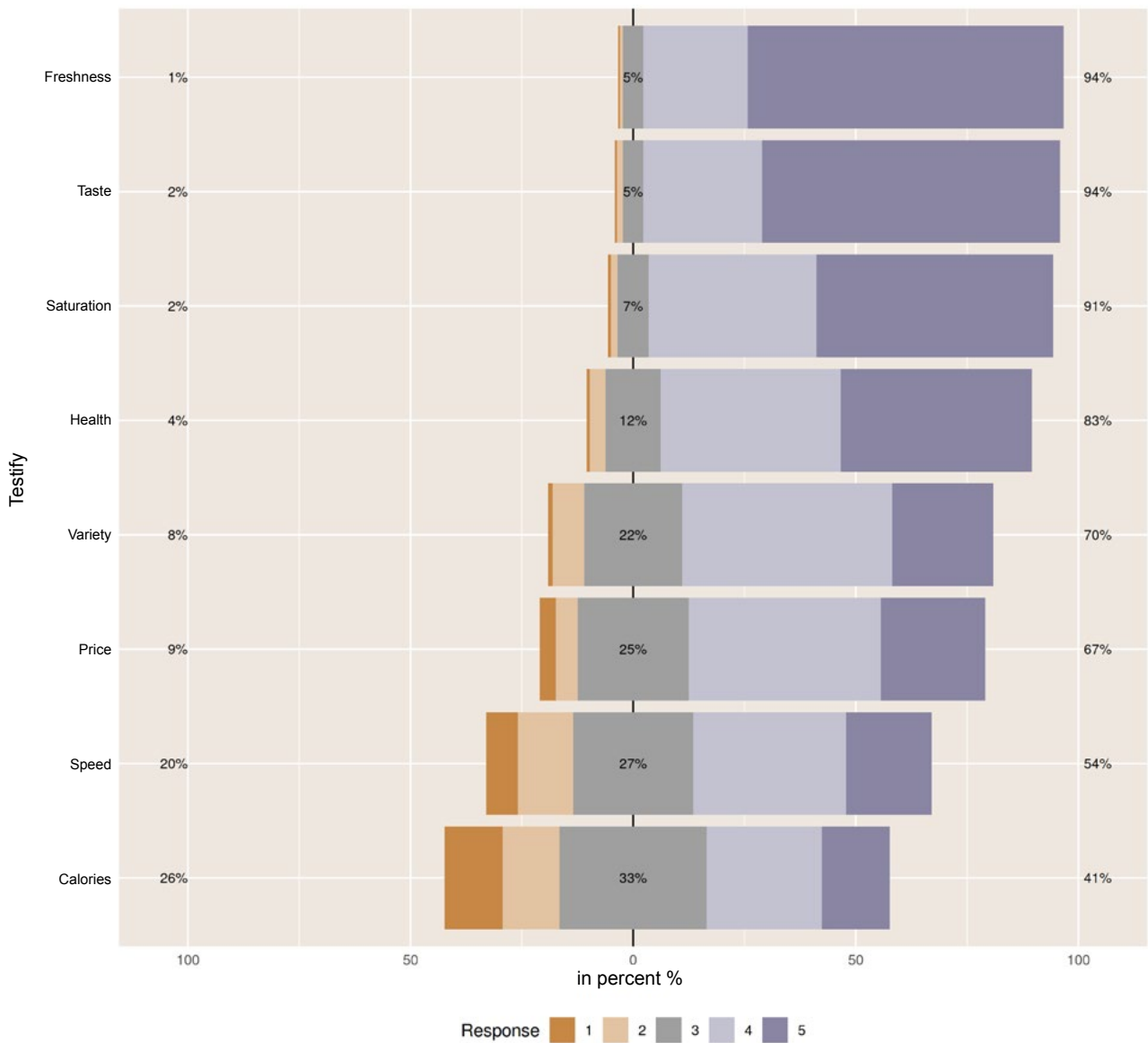


Source: Veganz Nutrition Survey

POLAND

VEGAN

How important are the following factors to you when it comes to food?
 Scale of 1 "Very important" to 6 "Completely unimportant"
 Veganz asked, poland vegans answered.



Source: Veganz Nutrition Survey

PORTUGAL

When asked about their income in Portugal, 41 % said they had about 500 - 1.000 € at their disposal per month. Just about 22 % earn a monthly 1.000 - 1.500 €. Equally, almost 15 % of those asked had no income at all. 20 % of the nearly 97 % of Portuguese vegans want to contribute to animal welfare, 72 % are vegan for sustainability reasons and 48 % motivated by health. Just 3,4 % cite other reasons like, for example, religion or taste. In general, it turns out that Portuguese people cook very regularly for themselves. 62 % of vegans say they cook fresh every day - with non-vegans it's slightly less at just under 55 %. But the other respondents also cook themselves, usually five to six times a week.

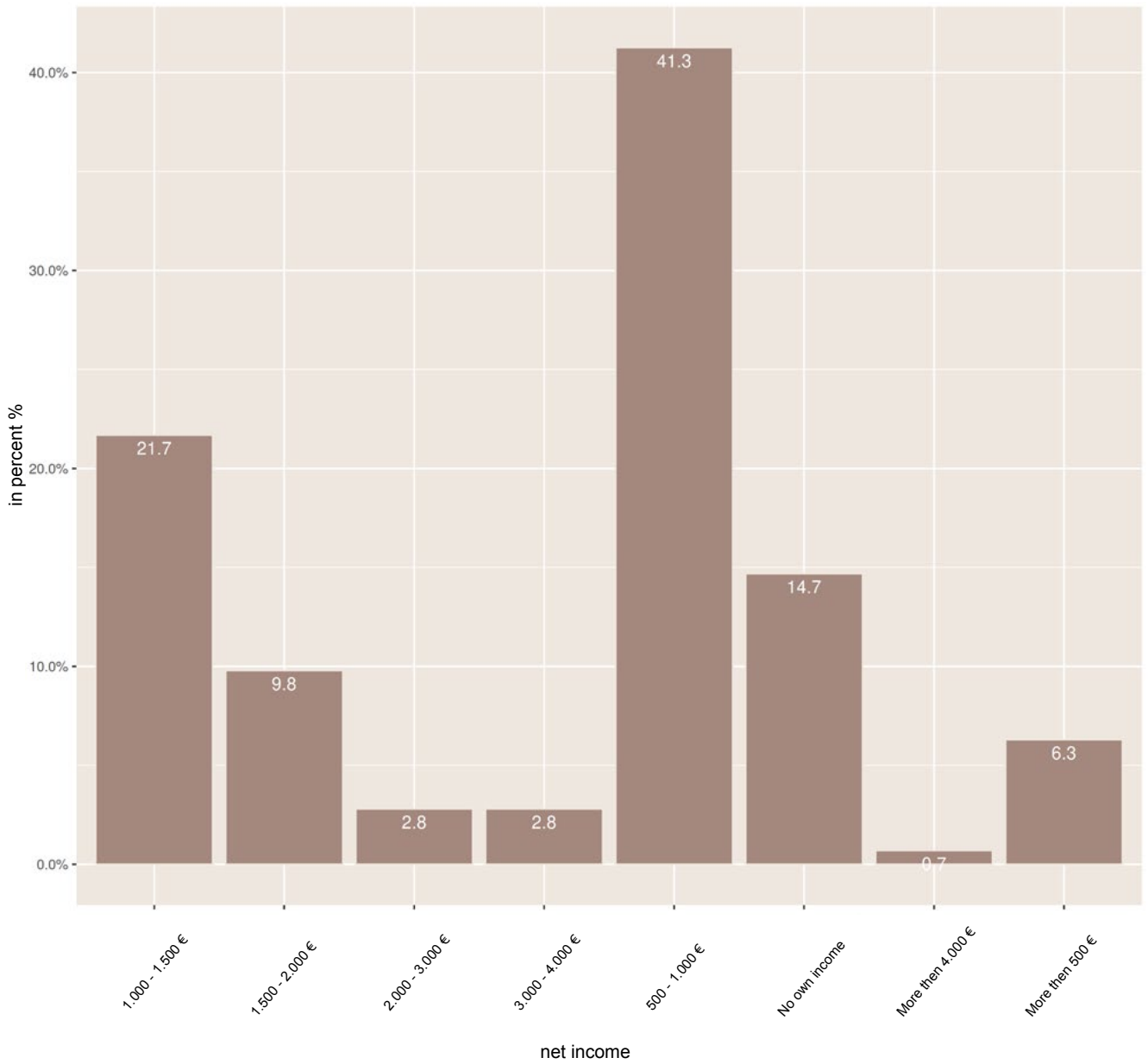
In Portugal, vegans obtain their information about new products and nutritional trends mainly through sharing with friends. This behaviour is somewhat less pronounced among non-vegans. On the other hand, they prefer online blogs and also have a stronger tendency towards magazines and newspapers as well as advertising flyers and obtaining information directly from the supermarket. Portuguese prefer the supermarket for food purchases. In addition, the health food store is popular with half of the Portuguese non-vegans

and almost 66 % of vegans. Similarly, almost 21 % of vegan women in Portugal surveyed say they buy their food online. For the other food groups, the figure is 5 % lower.

When it comes to product attributes for vegan foods, Portuguese consumers place particular emphasis on ingredients, sustainability and quality. As far as regionality, innovation and certified organics go, opinions diverge, and many people are undecided. Less important to Portuguese vegans is whether it is a well-known brand product or not. Almost three quarters of vegans surveyed long for more choice in the area of vegan cured meats and cheese alternatives. In the areas of sweets/snacks and baked goods, too, more than 40 % of vegans in Portugal say there is a lack of plant-based counterparts.

Most vegan women in Portugal are in agreement when it comes to food shopping. They place great value on sustainability and environmental protection and pay attention to regionality. In addition, quality seals play a decisive role for the majority. In Portugal, non-vegans are more likely to be seasonal. In contrast, they have less confidence in labels and generally speaking, opinions differ a little more here.

What is your net monthly income?
Veganz asked, portuguese answered.

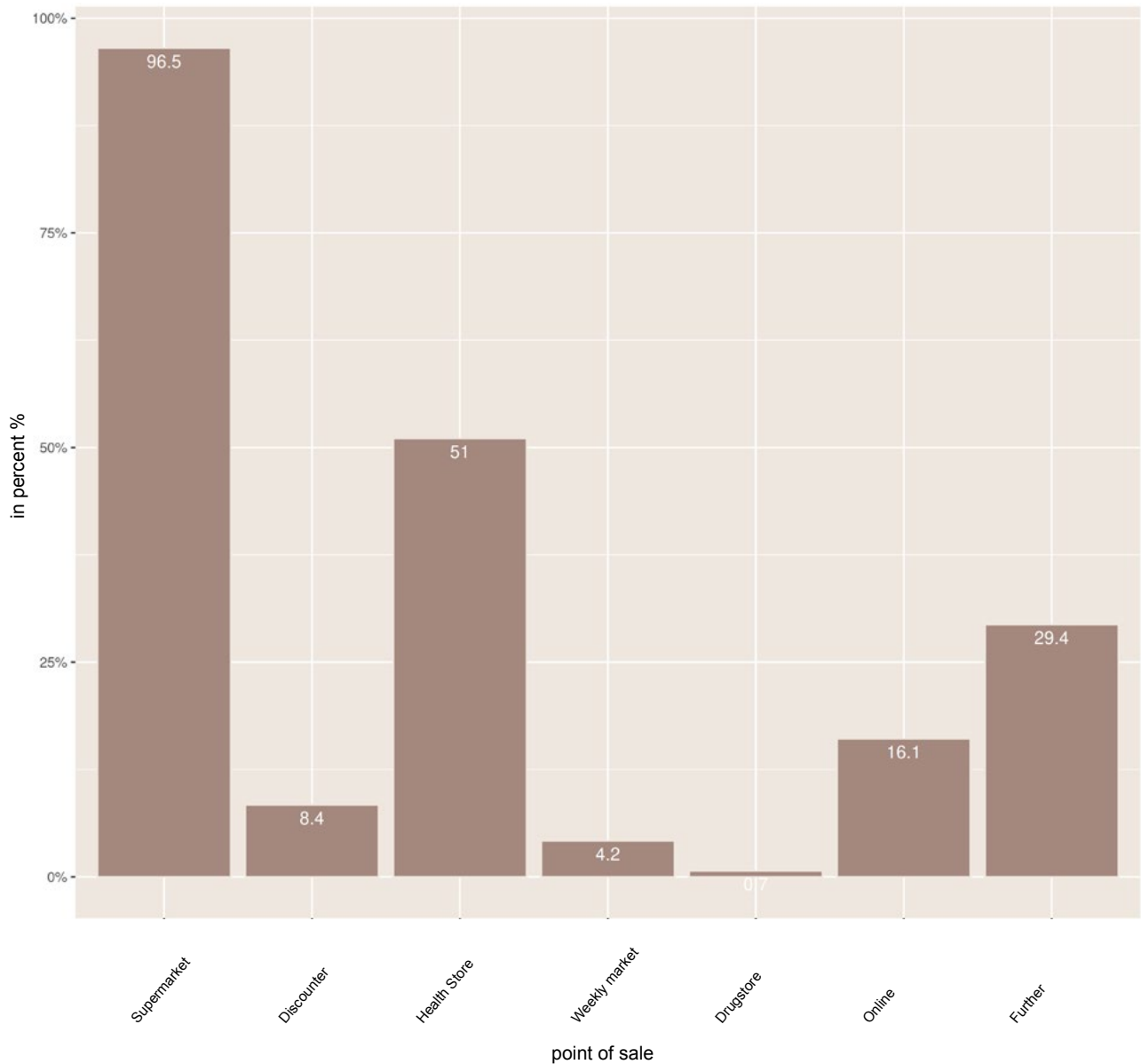


Source: Veganz Nutrition Survey

PORTUGAL

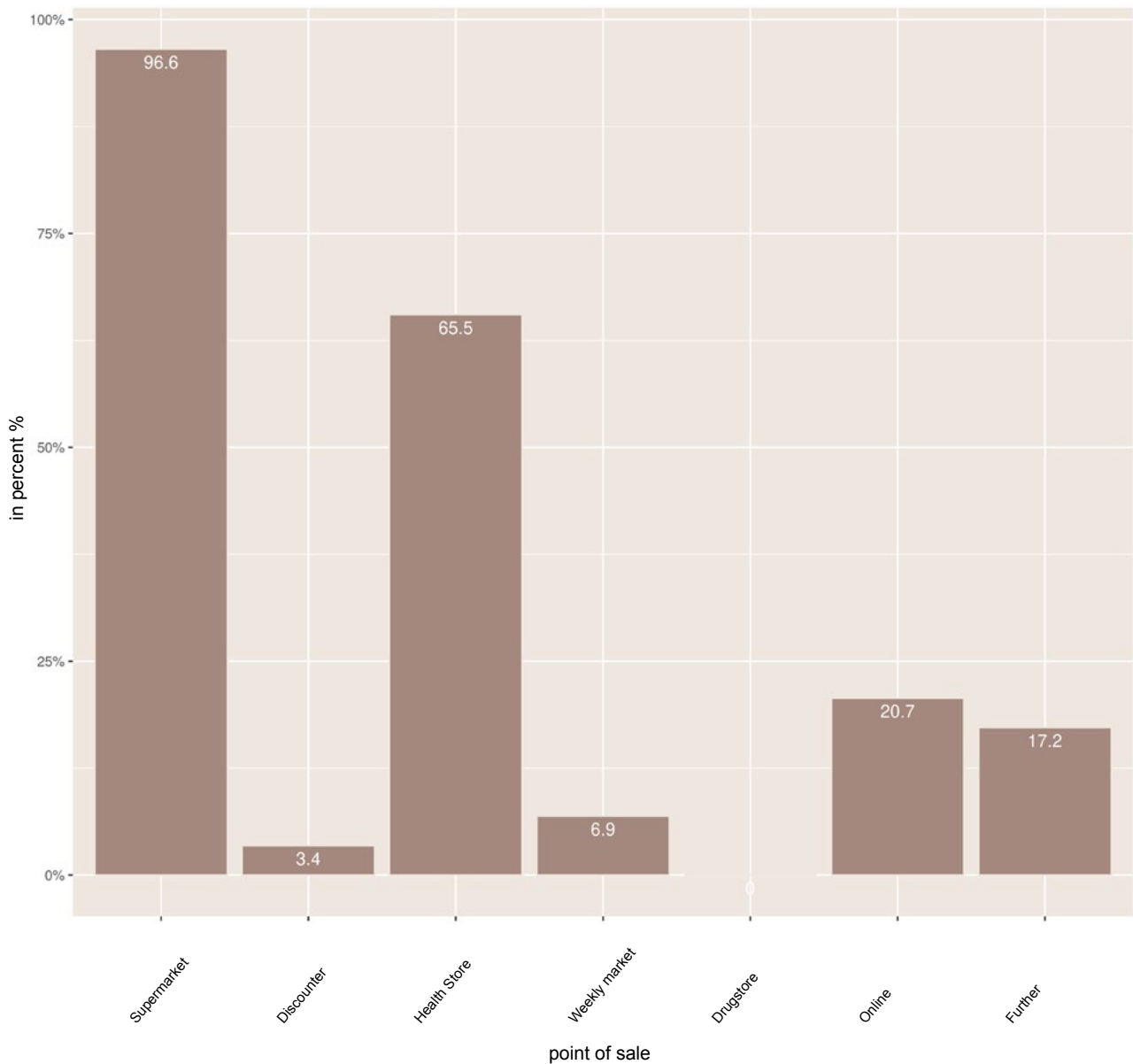
NON-VEGAN

Where do you buy food?
Veganz asked, portuguese non-vegans answered.



Source: Veganz Nutrition Survey

Where do you buy food?
Veganz asked, portuguese vegans answered.

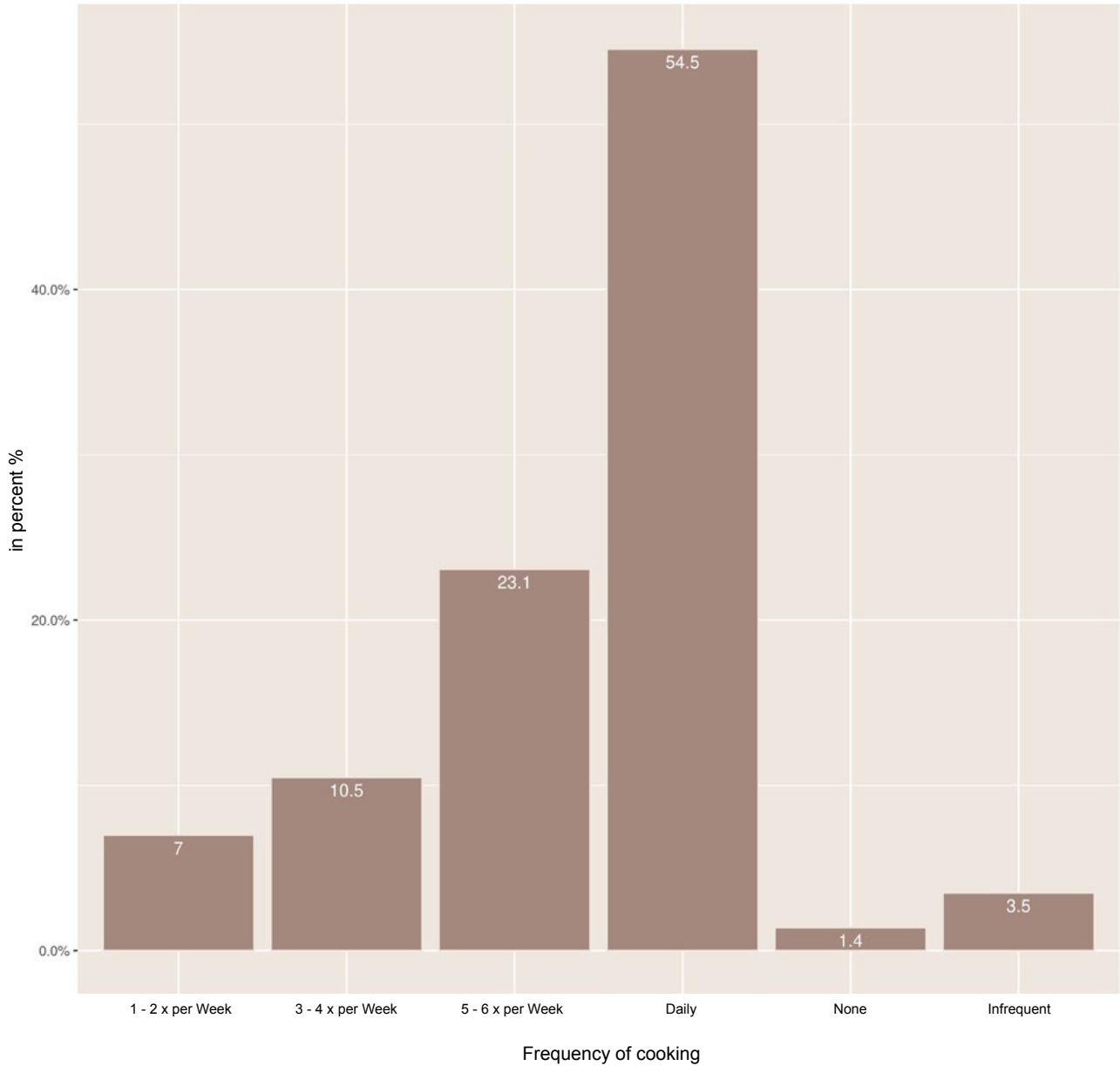


Source: Veganz Nutrition Survey

PORTUGAL

NON-VEGAN

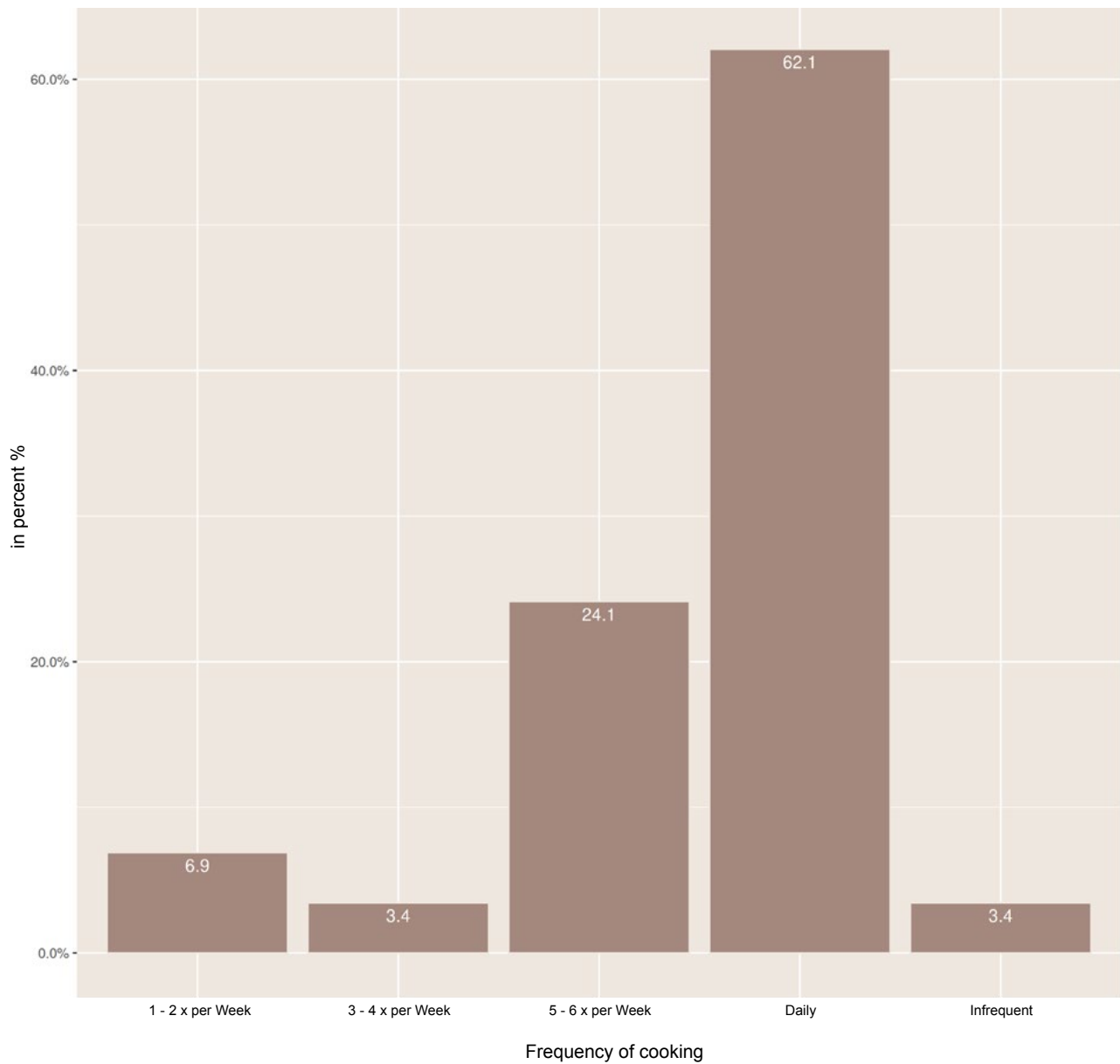
How often do you cook?
Veganz asked, portuguese non-vegans answered.



Source: Veganz Nutrition Survey

How often do you cook?

Veganz asked, portuguese vegans answered.

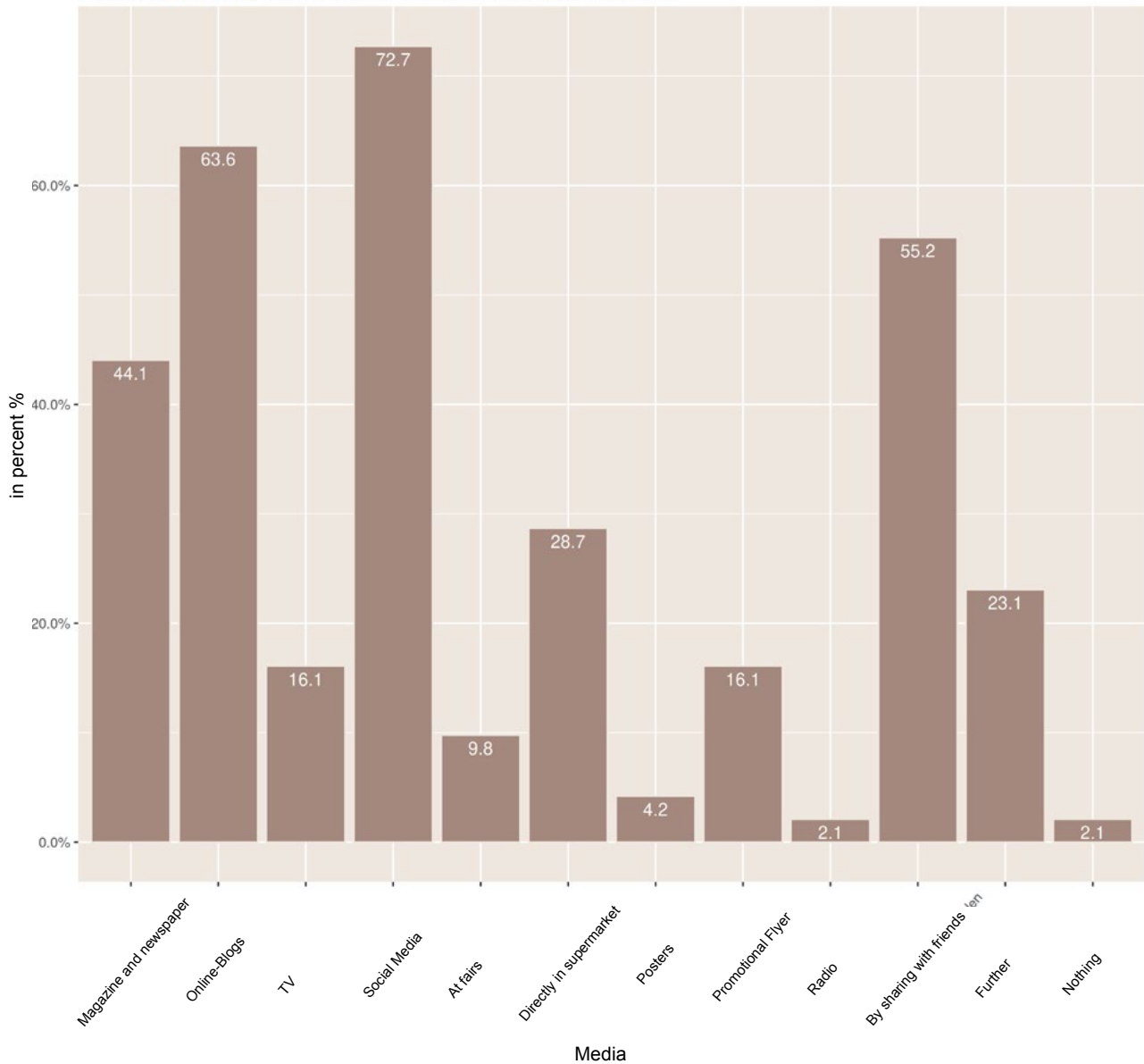


Source: Veganz Nutrition Survey

PORTUGAL

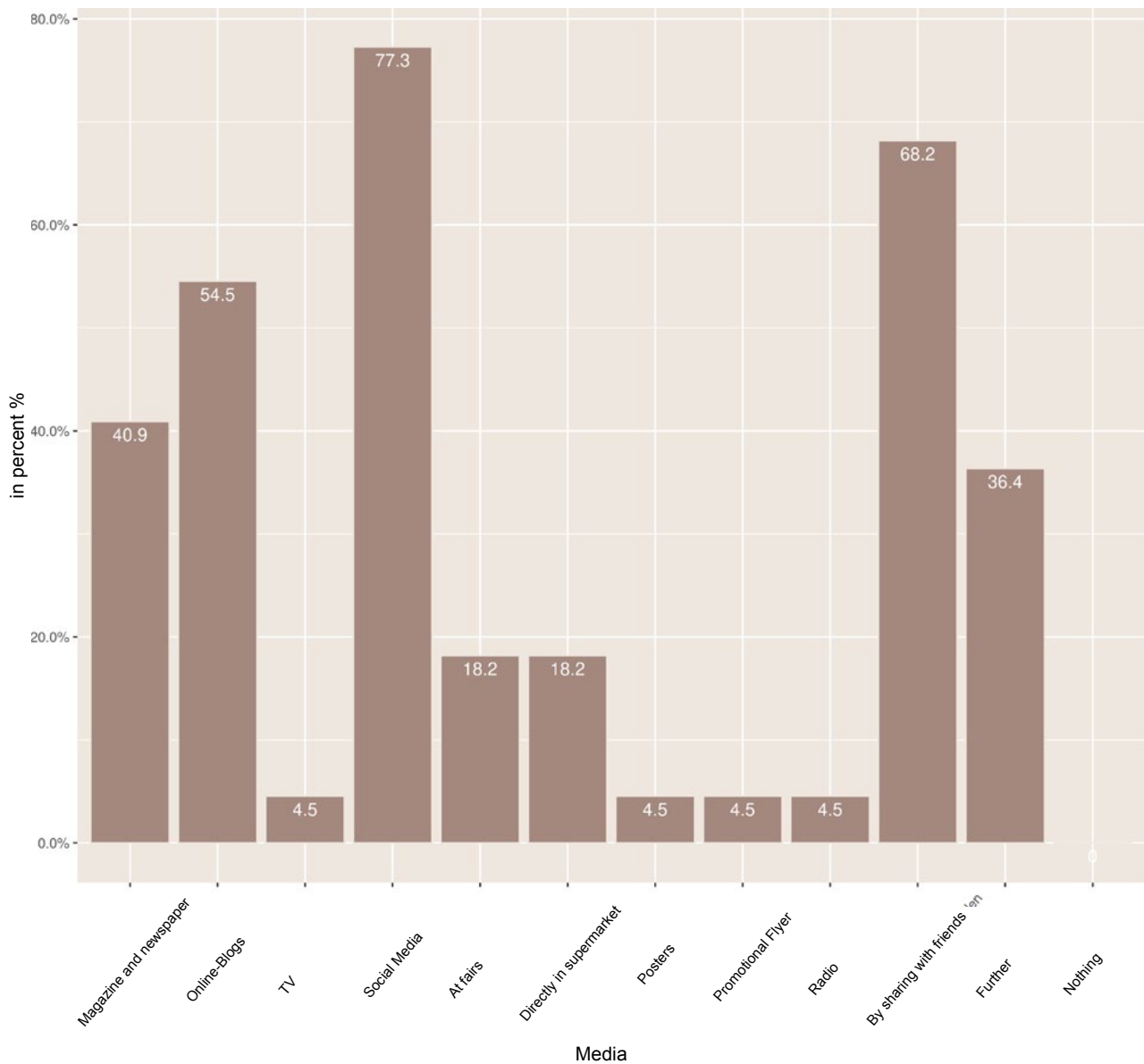
NON-VEGAN

Where do you find information about dietary trends and product innovations?
Veganz asked, portuguese non-vegans answered.



Source: Veganz Nutrition Survey

Where do you find information about dietary trends and product innovations?
Veganz asked, portuguese vegans answered.



Source: Veganz Nutrition Survey

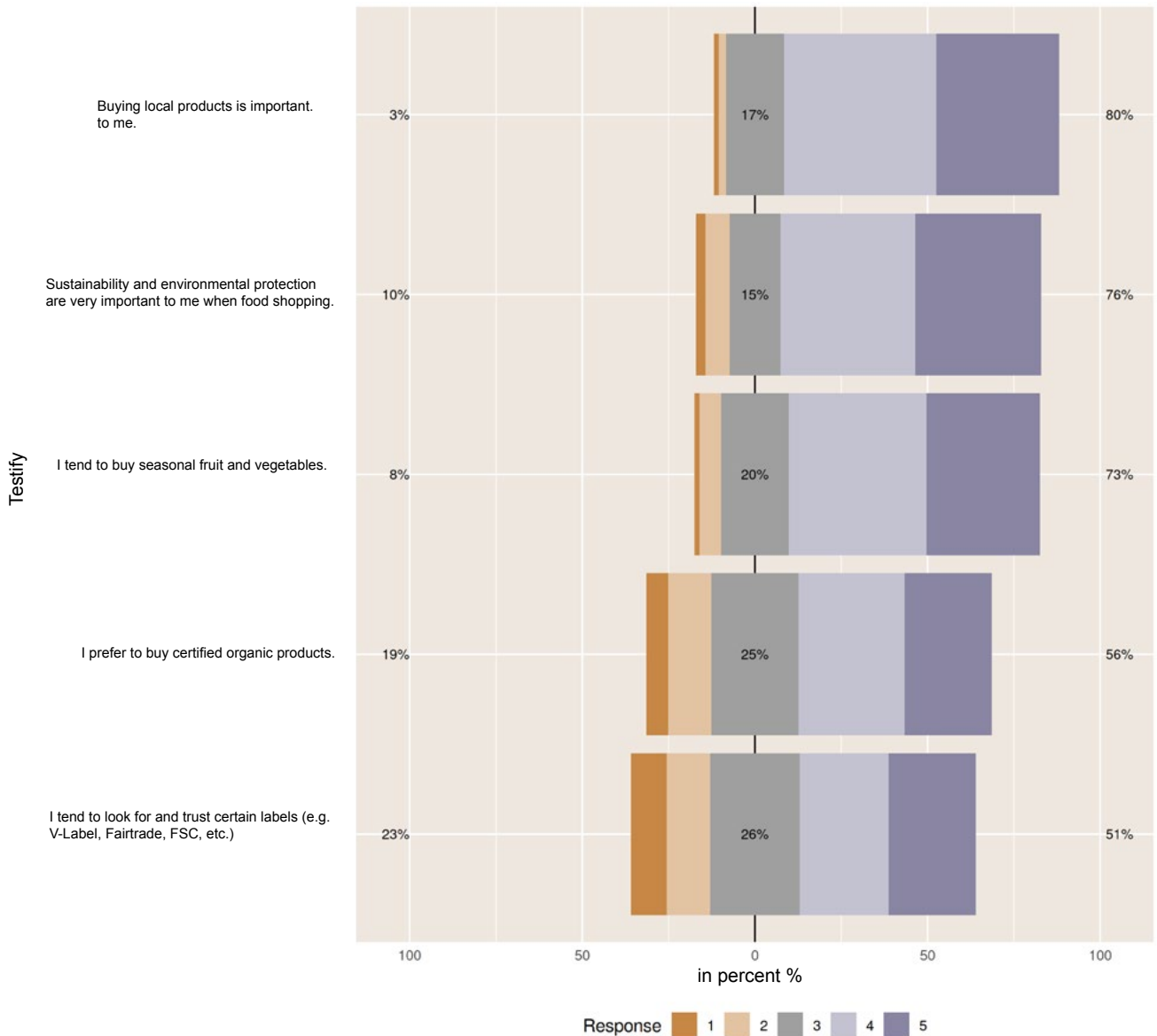
PORTUGAL

NON-VEGAN

To what extent do the following statements describe you?

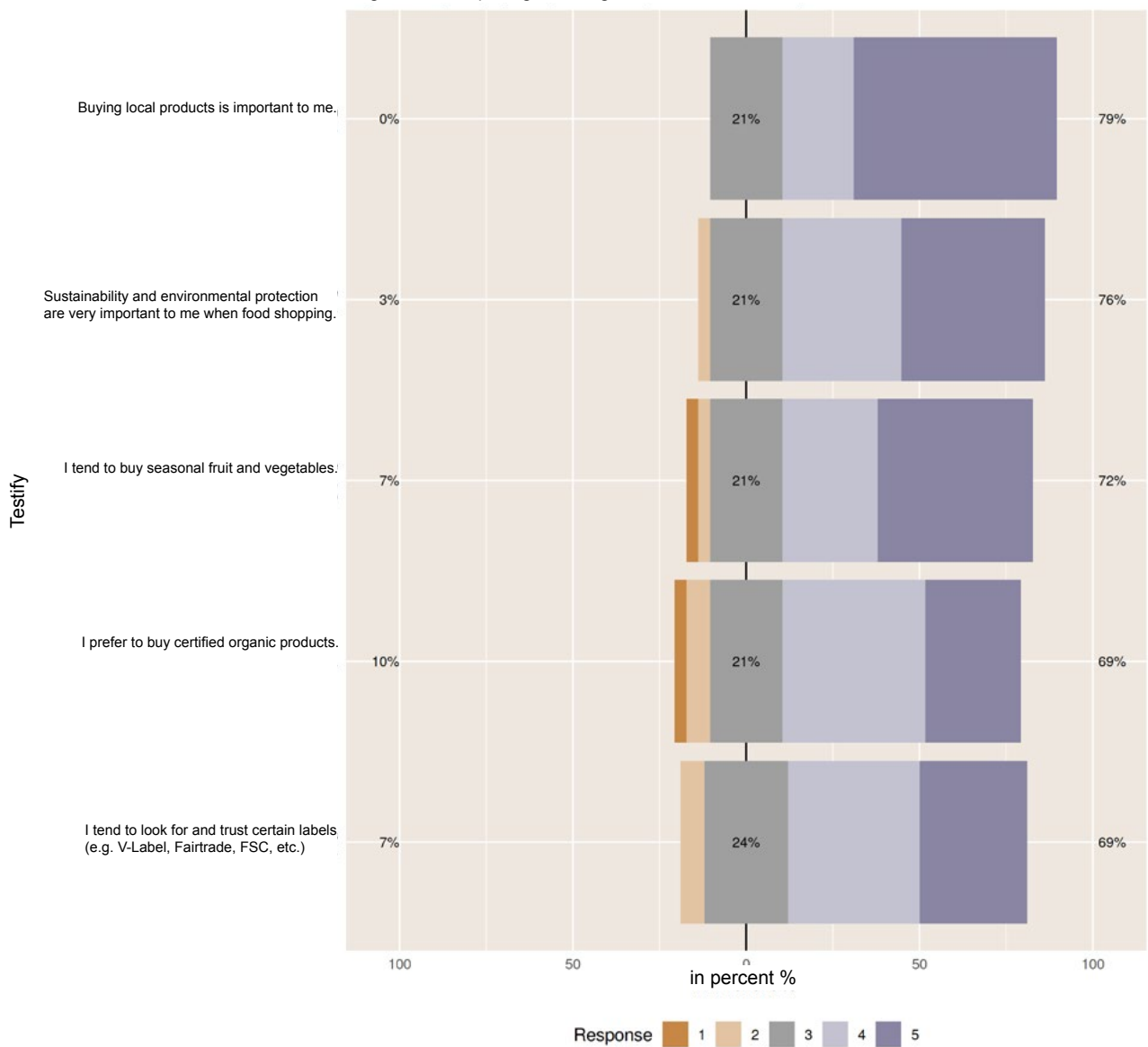
Scale from 1 "Totally agree" to 6 "Totally disagree"

VeganZ asked, portuguese non-vegans answered.



Source: VeganZ Nutrition Survey

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 Veganz asked, portuguese vegans answered.

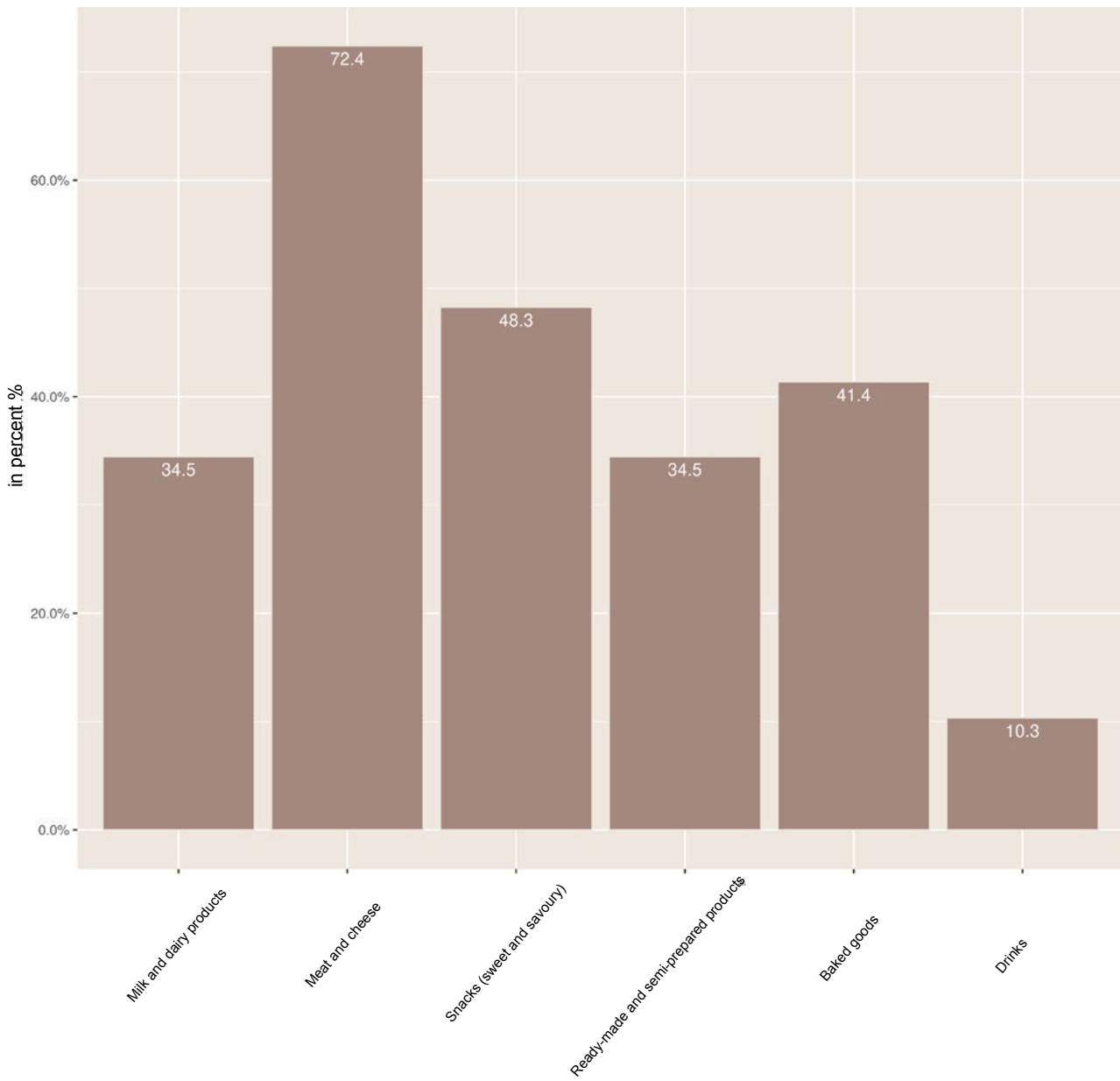


Source: Veganz Nutrition Survey

PORTUGAL

VEGAN

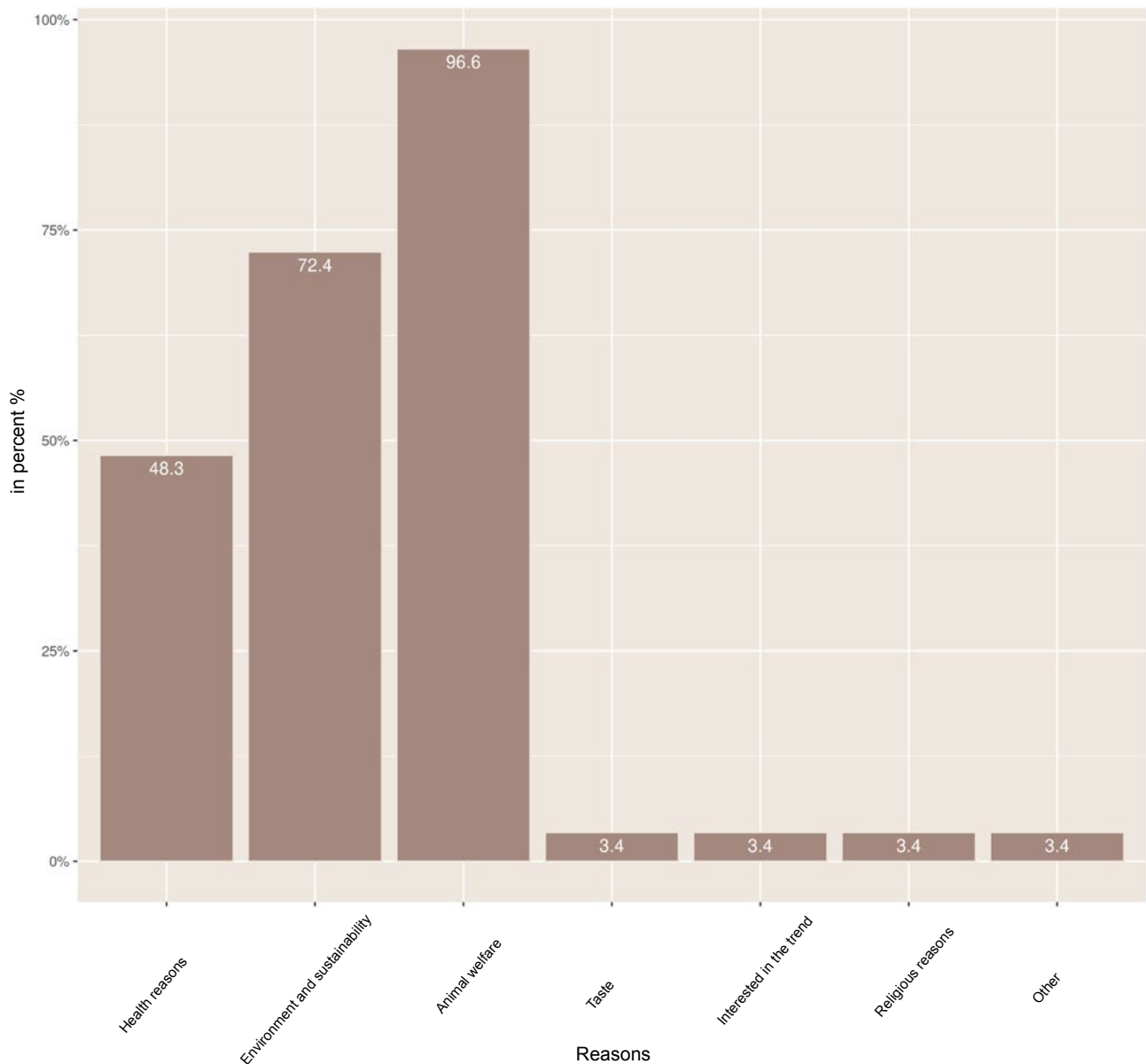
What type of vegan alternatives would you like to see more of?
Veganz asked, portuguese vegans answered.



Media

Source: Veganz Nutrition Survey

What are your reasons for eating vegan?
Veganz asked, portuguese vegans answered.

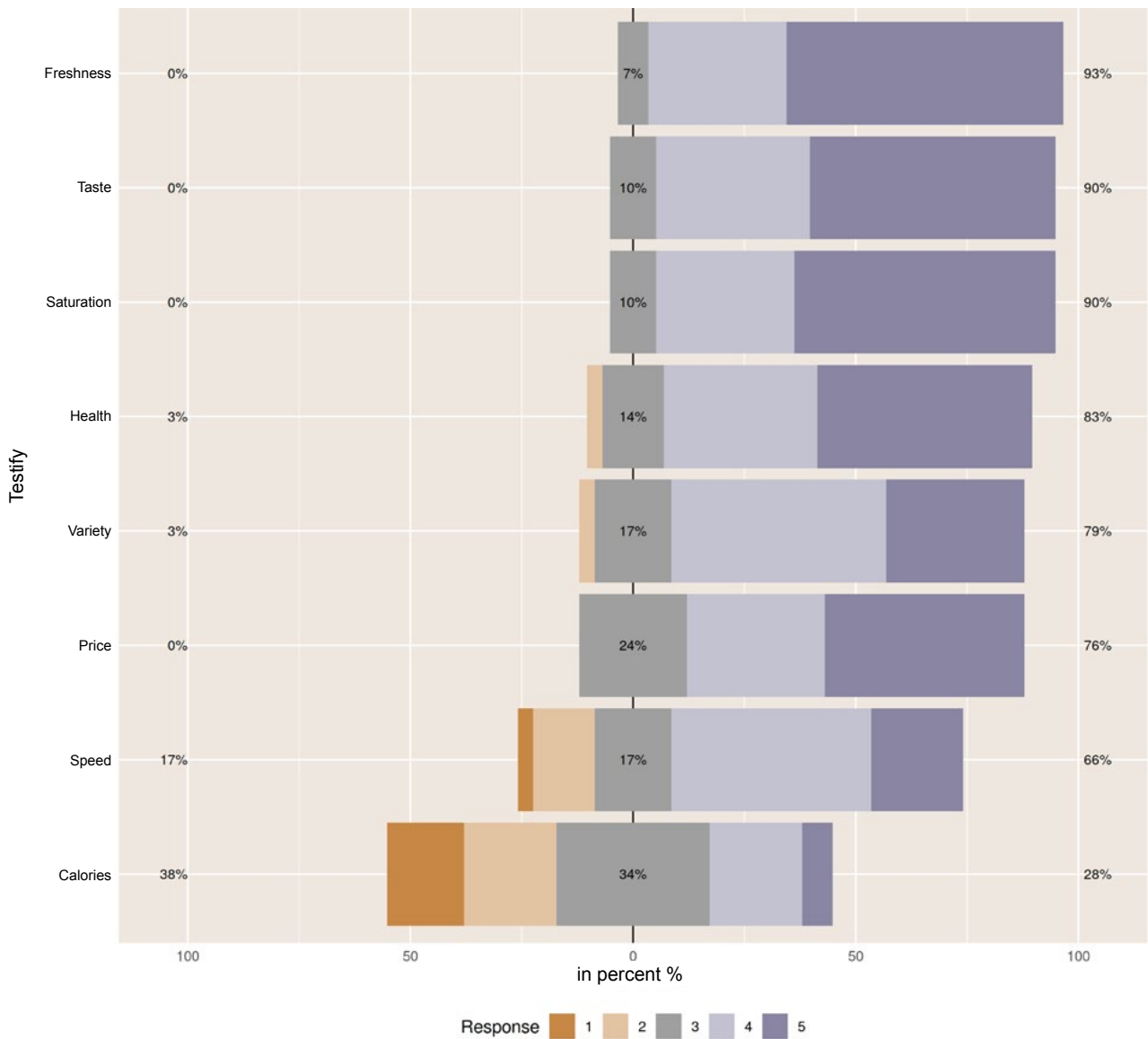


Source: Veganz Nutrition Survey

PORTUGAL

VEGAN

How important are the following factors to you when it comes to food?
 Scale of 1 "Very important" to 6 "Completely unimportant"
 Veganz asked, portuguese vegans answered.



Source: Veganz Nutrition Survey

SLOVENIA

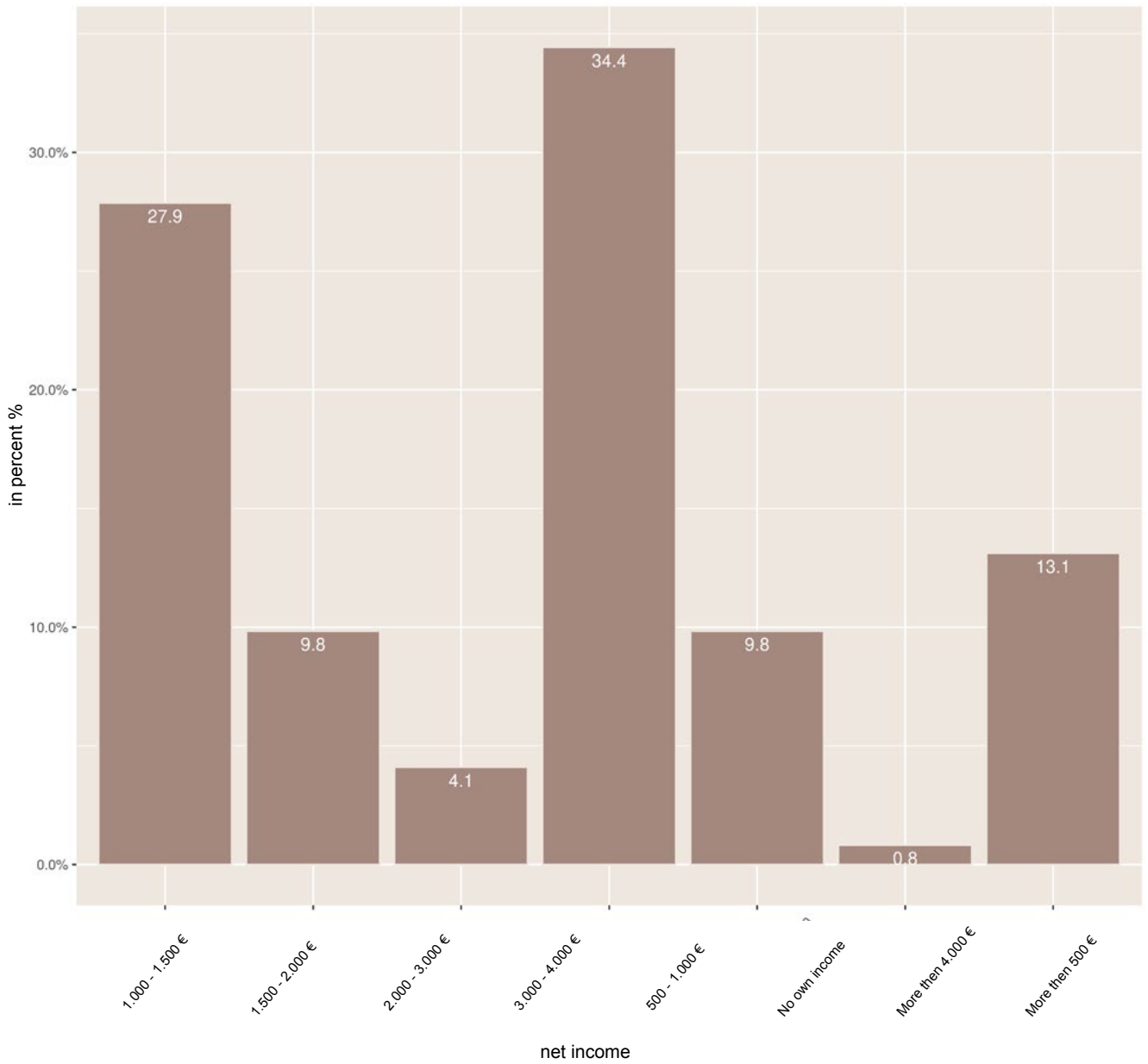
Net income distribution of Slovenians surveyed is in the lower range. 34,4 % say they made 500 - 1.000 € a month. A further 27,9 % report an income of between 1.000 - 1.500 €. For Slovenian vegans, the most important reason for their choice of diet is animal welfare, followed by environment and sustainability as well as their own health, whereby the latter was motivation for just 42,5 %. 20 % are vegan because of the taste. In terms of cooking behaviour, Slovenian vegans hardly differ from the other food groups. About 40 % of Slovenians say they cook for themselves every day. Very few cook less often than once a week, with the vegan women cooking almost 2 % more. When it comes to being informed about the newest diet trends and innovative products, 90 % of Slovenian vegans prefer social media outlets. In addition, 71 % are particularly fond of talking with friends and 60 % read online blogs. 26 % of vegans say they get their information from advertising leaflets, which is nearly the same with non-vegans, however they also acquire their information directly at the supermarket. In addition to the supermarket, 75 % of Slovakian vegans buy their food in health food stores. That's 10 %

more than with the other nutrition groups. And 40 % say they use the discount retailer and weekly markets for their shopping. A further 37,5 % also shop online.

When shopping for vegan products, they place great value on quality, taste and sustainability. In relation to transparency, regionality and organic certifications, many of those surveyed said they weren't sure if those factors had any influence on what products they decide to buy. On the other hand, innovation and brand awareness seem to be less relevant for the vegans interviewed. More than half of Slovaks are rather dissatisfied with the selection of baked goods. There also seems to be a lack of cured meat and cheese alternatives as well as enough vegan options in the ready meal and semi-ready meal area.

In general, Slovakian vegans feel strongly about sustainability and environmental protection when purchasing foodstuffs as well as trust in quality seals and labels. This trust is significantly less in non-vegan Slovaks. Just 57 % of them prefer organic products whereas vegans prefer certified organic products at 60 %. However, where non-vegans increasingly focus on seasonality, for vegans it's 10 % less.

What is your net monthly income?
Veganz asked, slovenian answered.

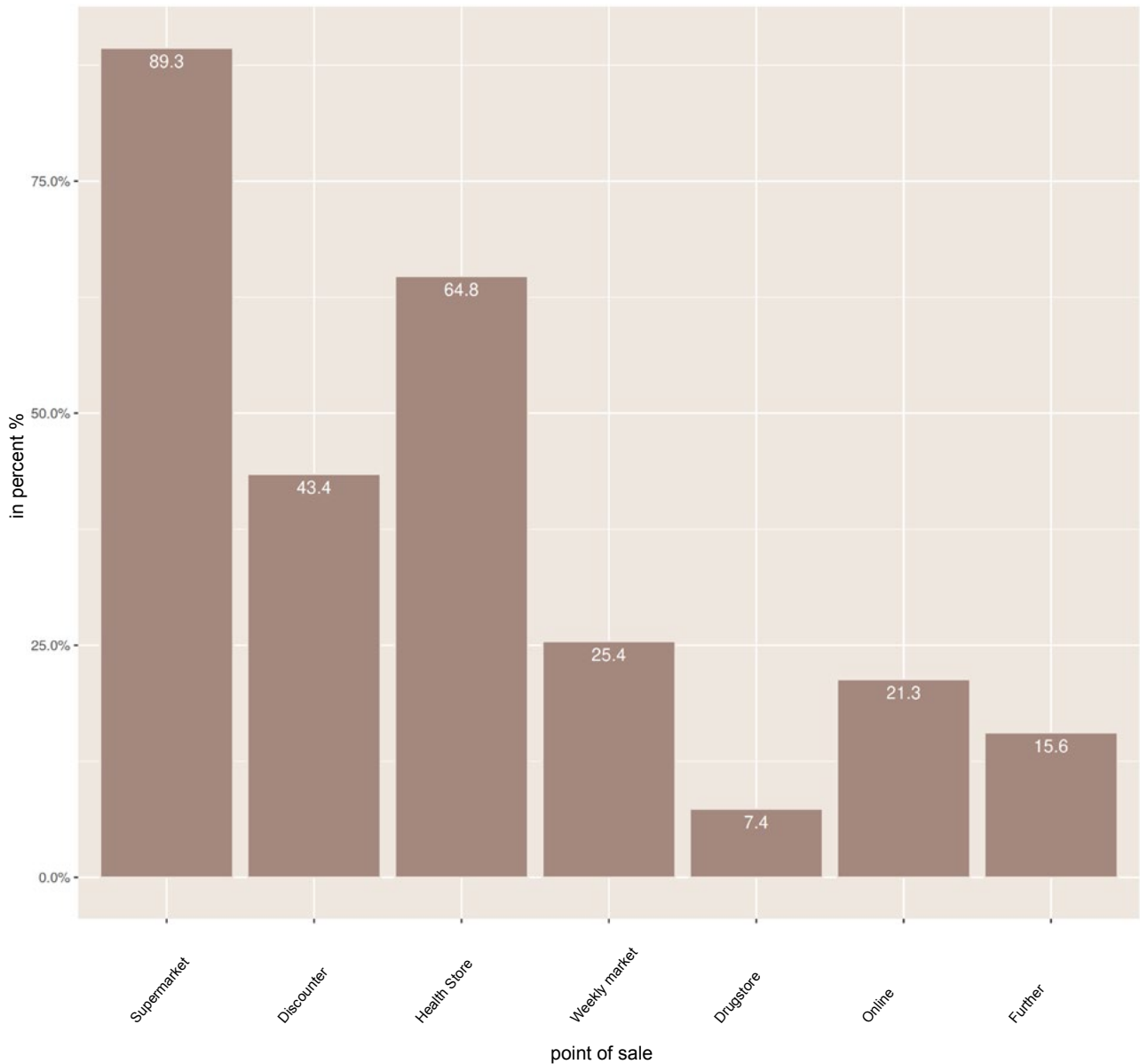


Source: Veganz Nutrition Survey

SLOVENIA

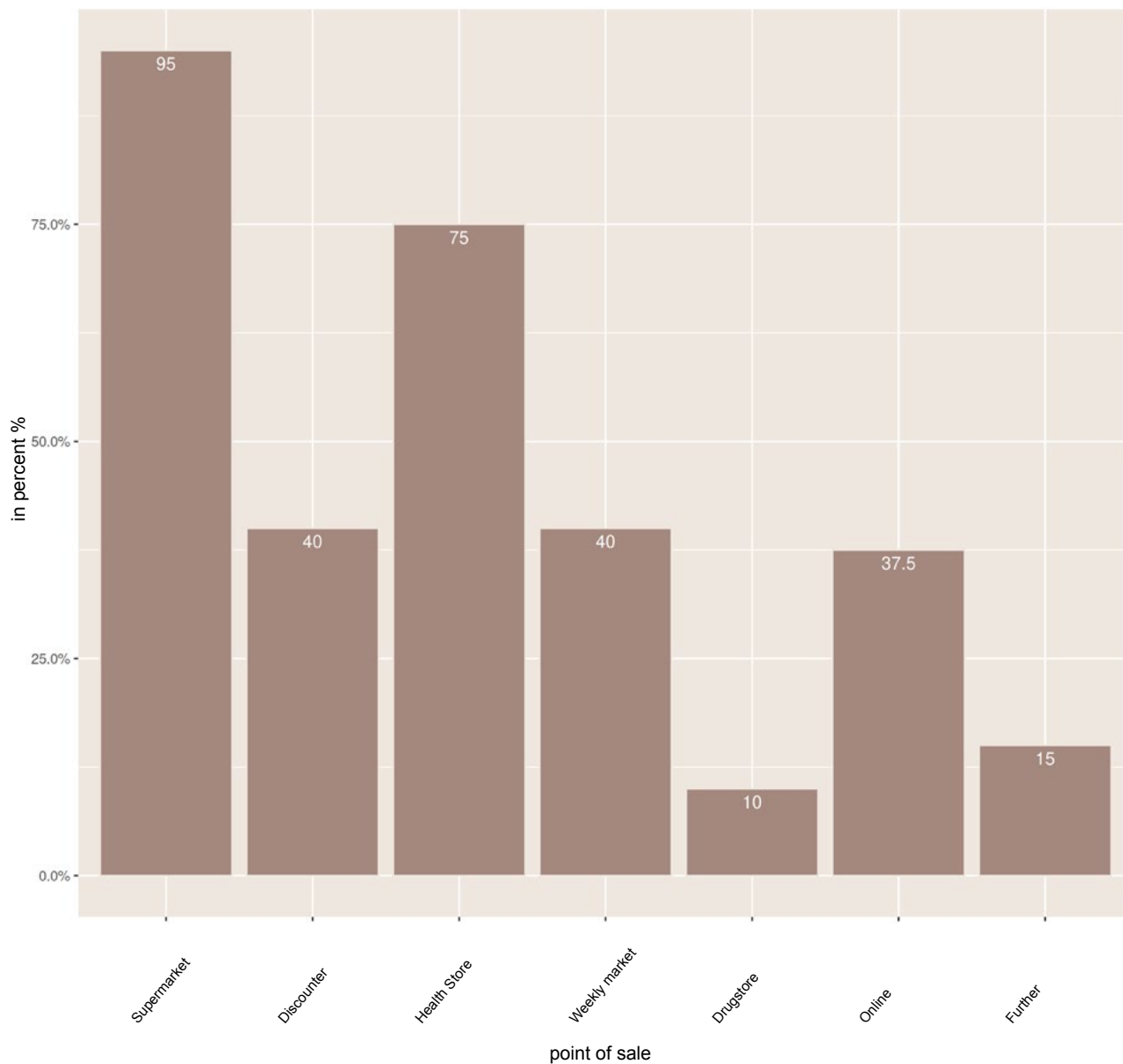
NON-VEGAN

Where do you buy food?
Veganz asked, slovenian non-vegans answered.



Source: Veganz Nutrition Survey

Where do you buy food?
Veganz asked, slovenian vegans answered.

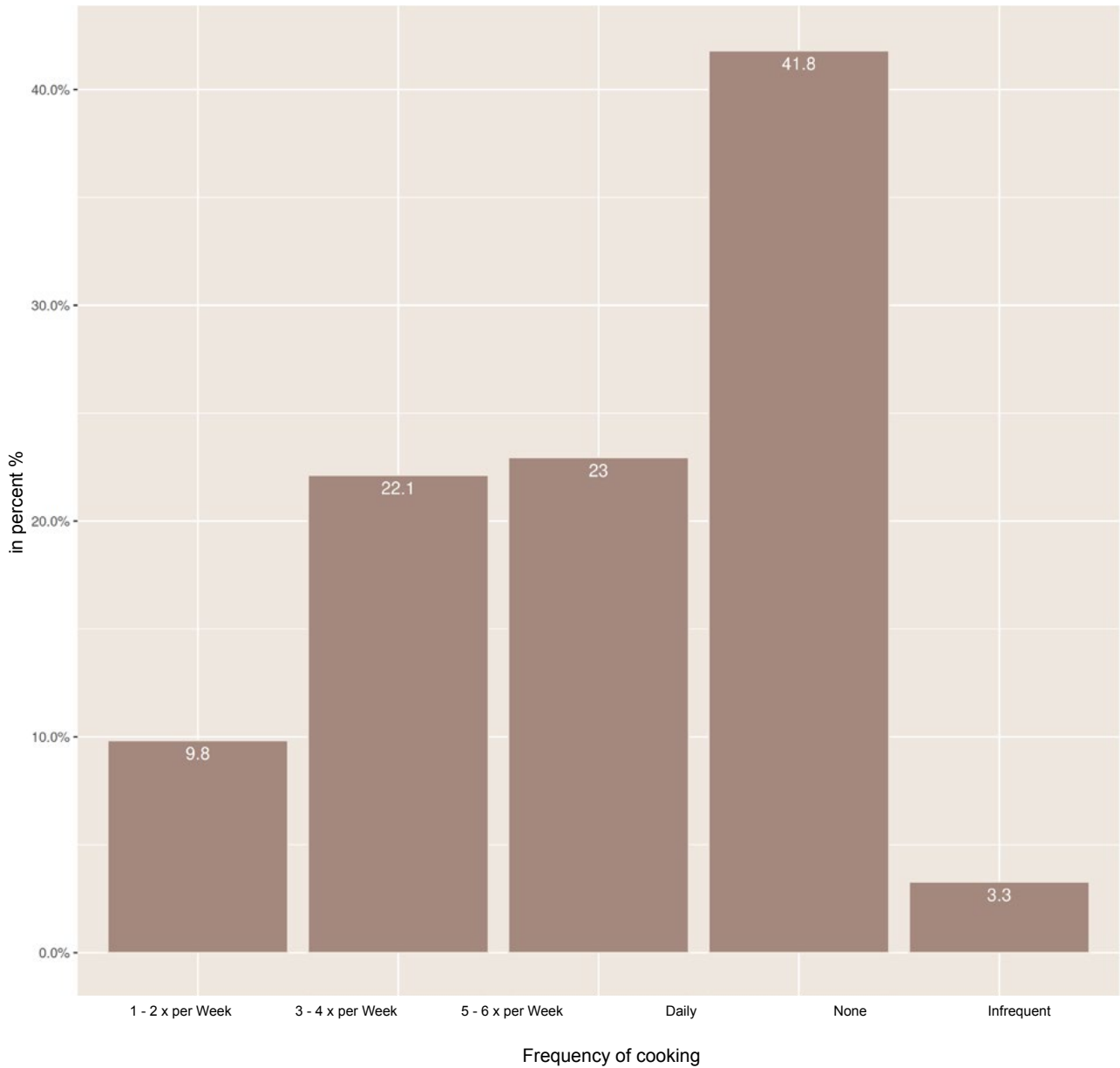


Source: Veganz Nutrition Survey

SLOVENIA

NON-VEGAN

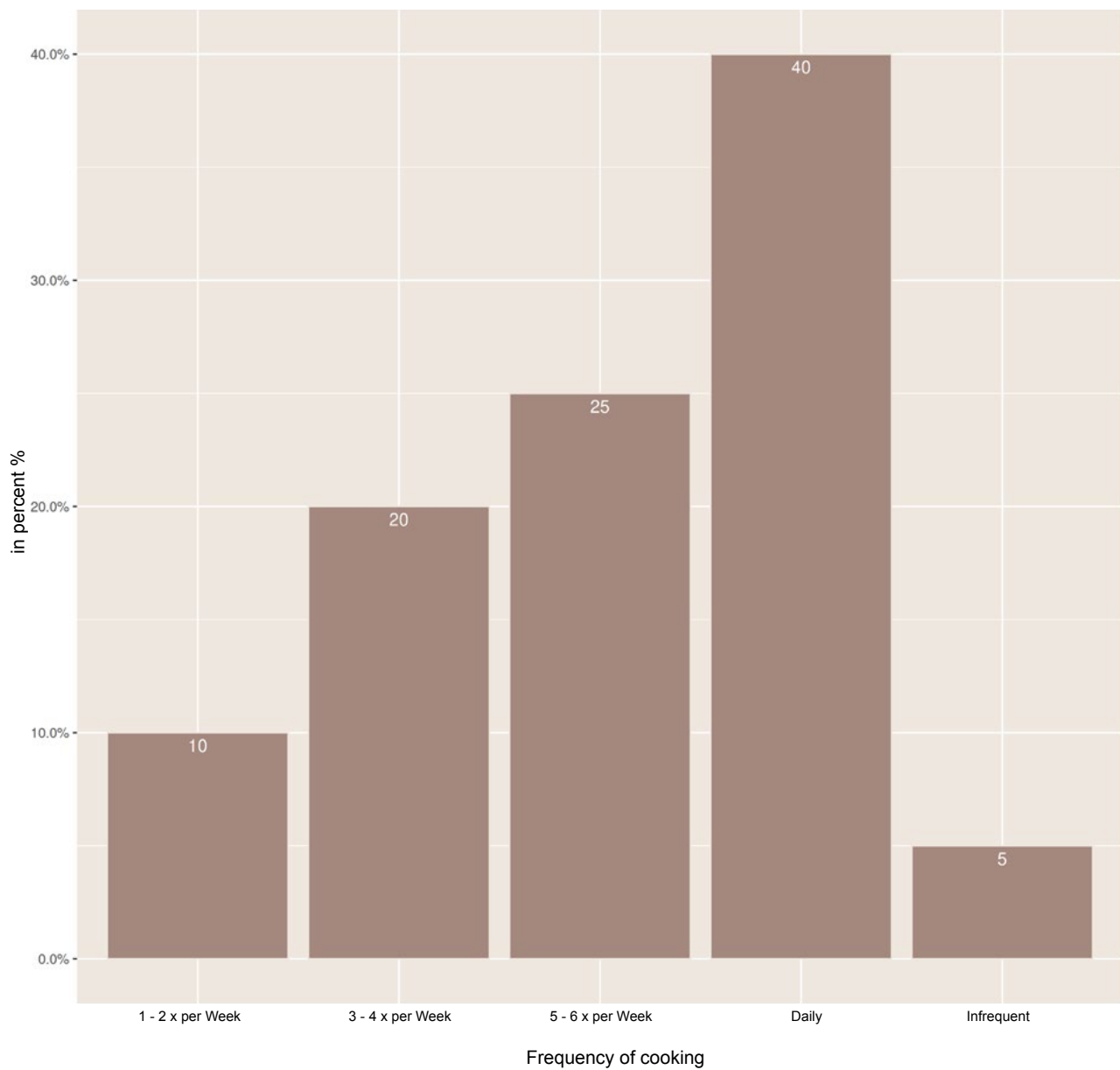
How often do you cook?
Veganz asked, slovenian non-vegans answered.



Source: Veganz Nutrition Survey

How often do you cook?

Veganz asked, slovenian vegans answered.

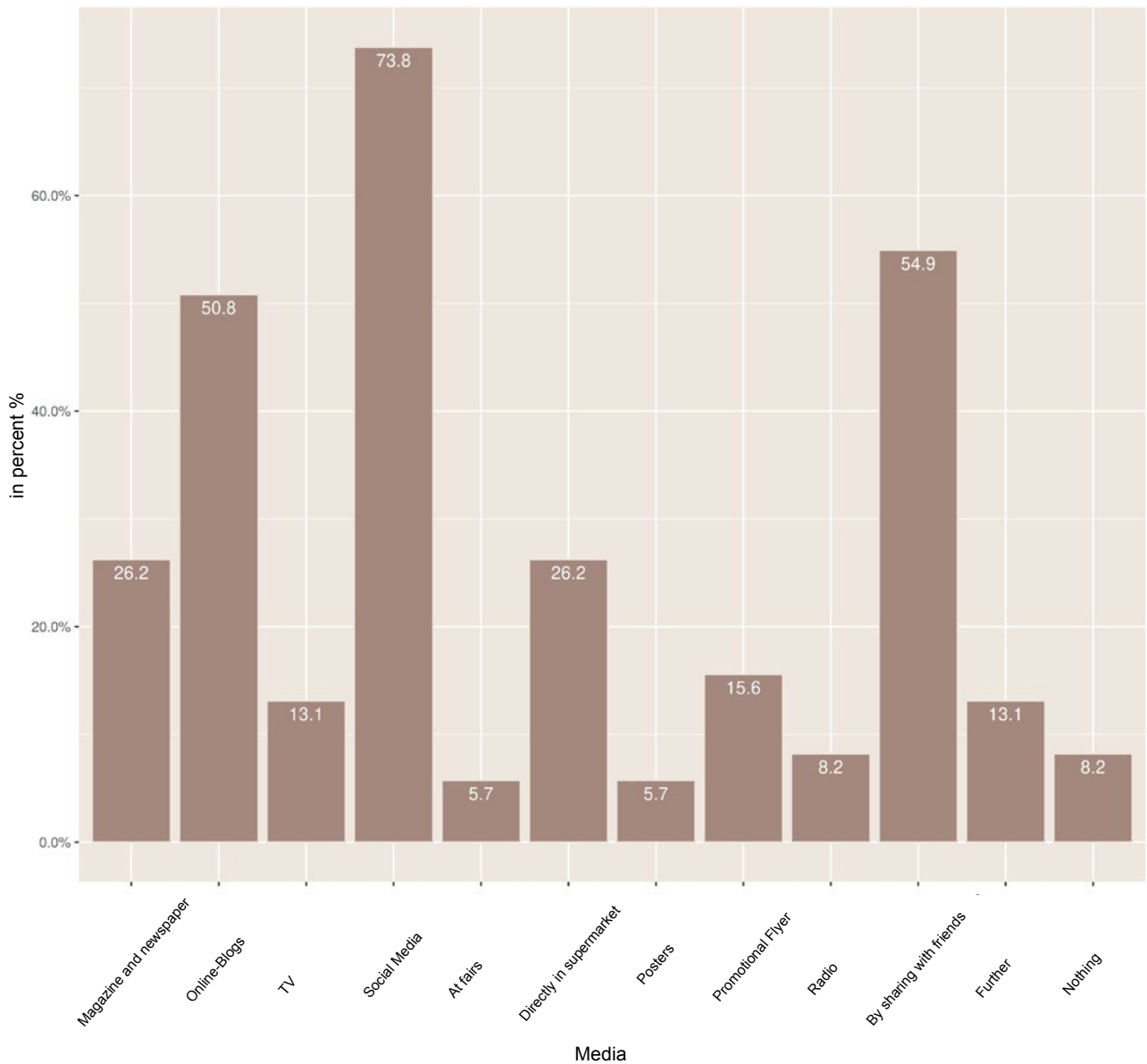


Source: Veganz Nutrition Survey

SLOVENIA

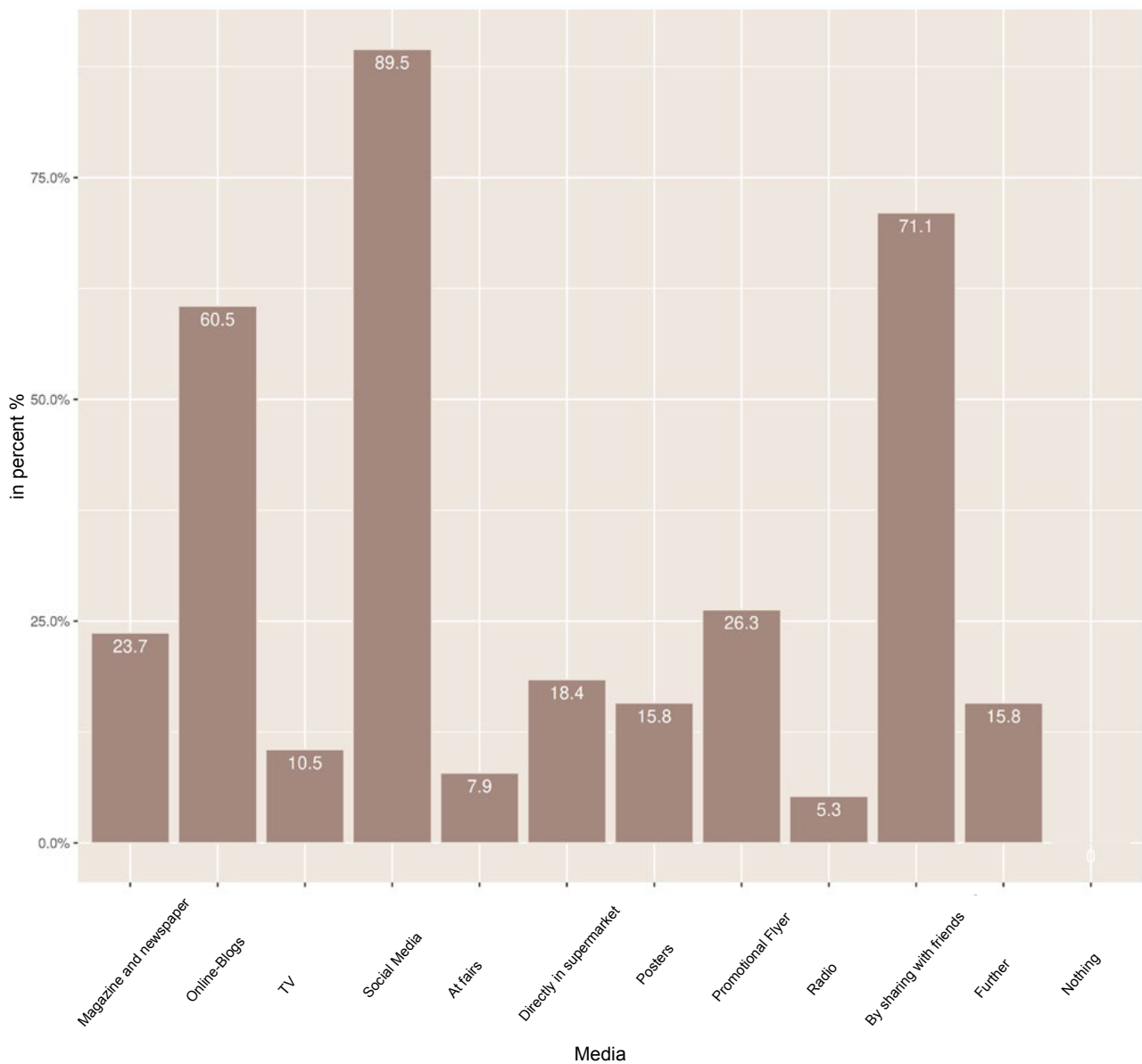
NON-VEGAN

Where do you find information about dietary trends and product innovations?
 Veganz asked, slovenian non-vegans answered.



Source: Veganz Nutrition Survey

Where do you find information about dietary trends and product innovations?
Veganz asked, slovenian vegans answered.

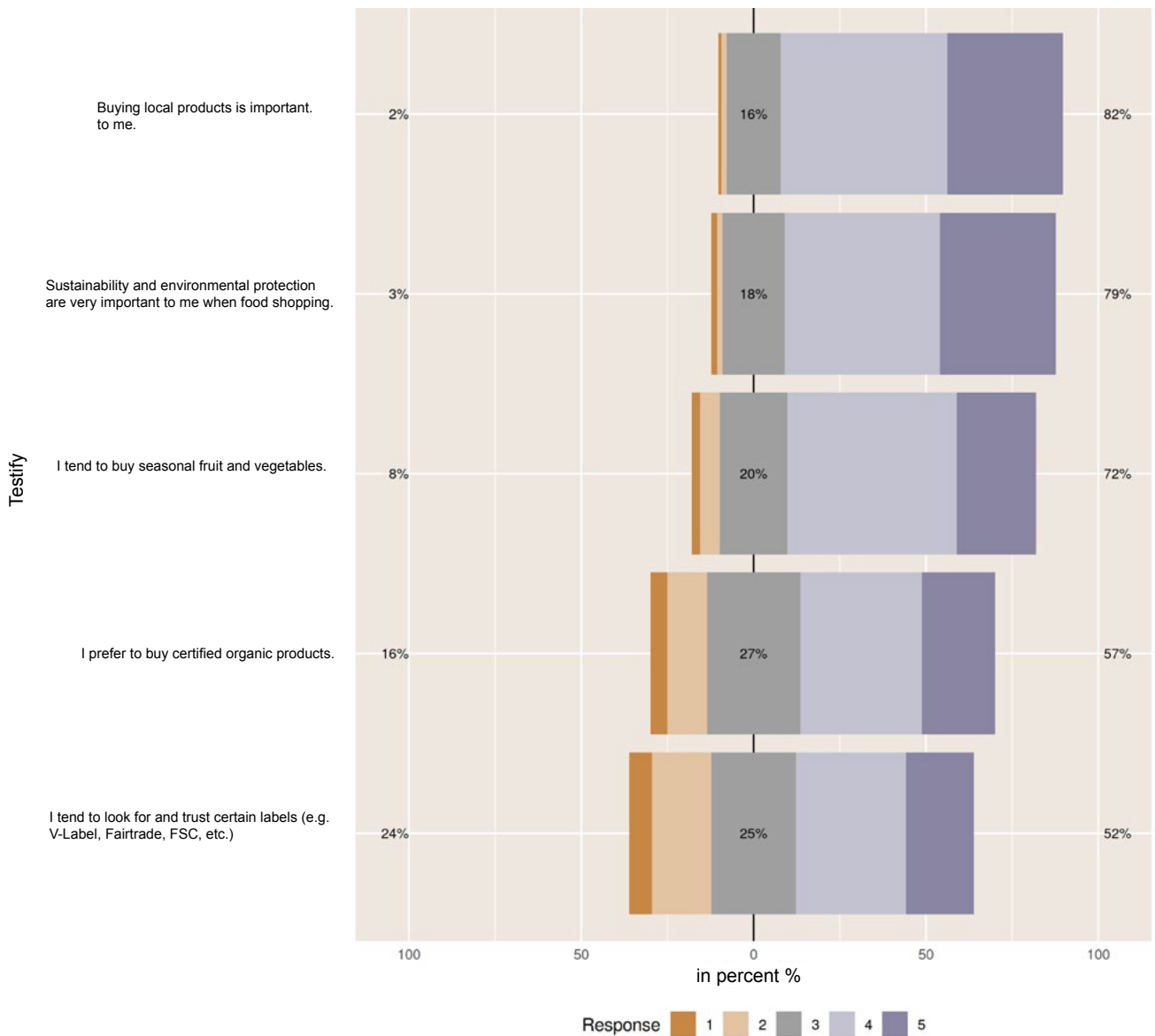


Source: Veganz Nutrition Survey

SLOVENIA

NON-VEGAN

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 Veganz asked, slovenian non-vegans answered.

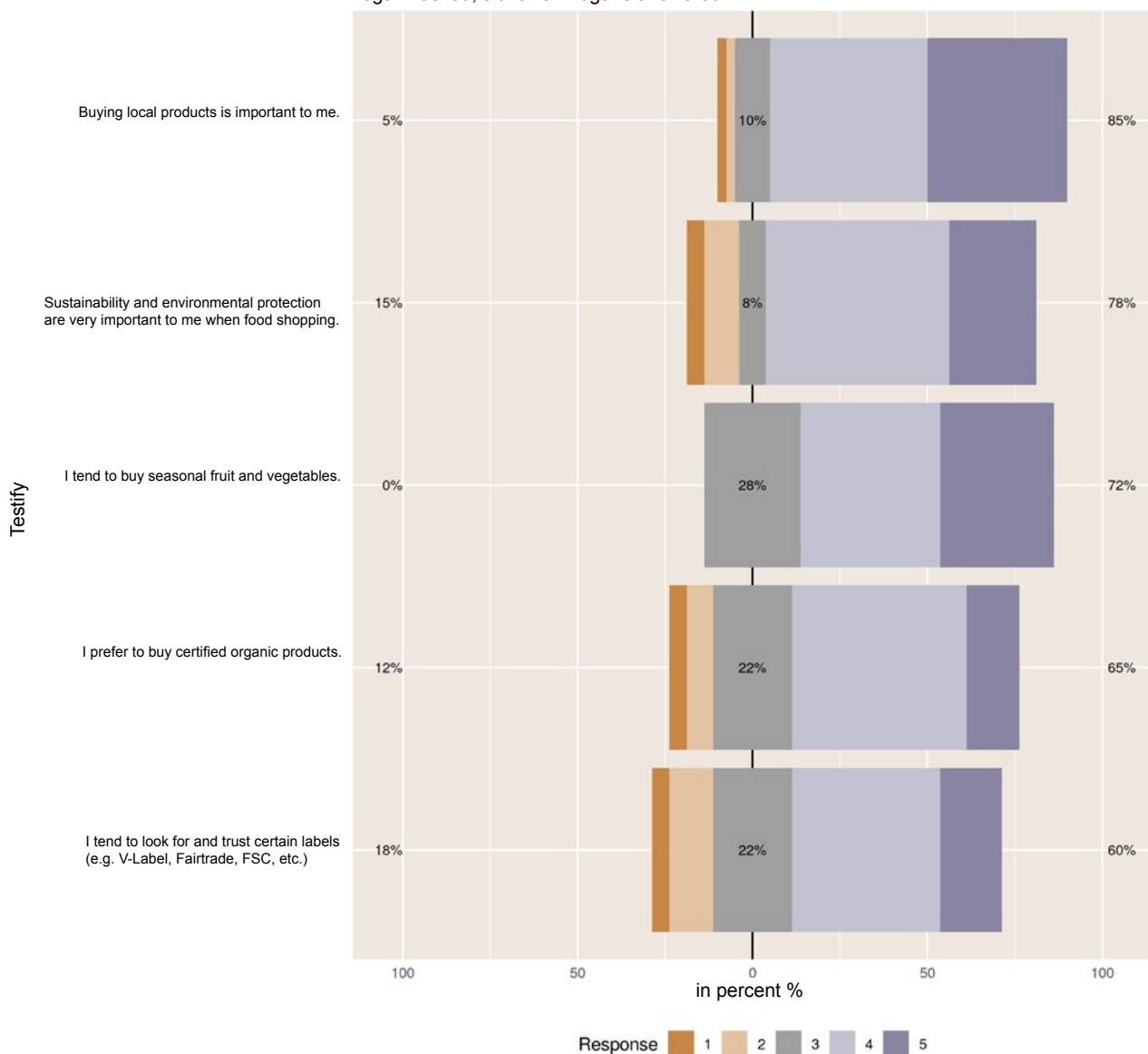


Source: Veganz Nutrition Survey

To what extent do the following statements describe you?

Scale from 1 "Totally agree" to 6 "Totally disagree"

Veganz asked, slovenian vegans answered.

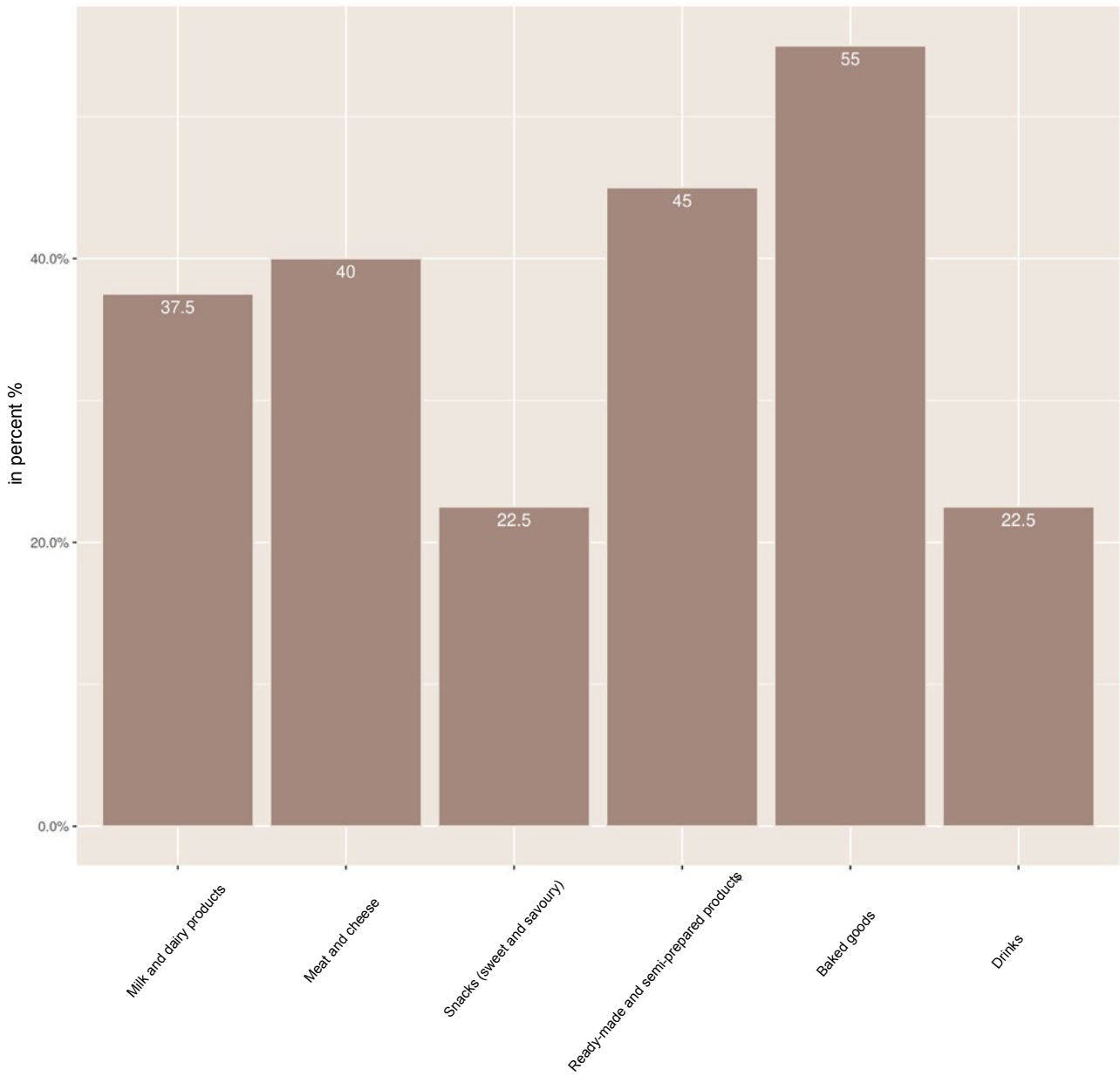


Source: Veganz Nutrition Survey

SLOVENIA

VEGAN

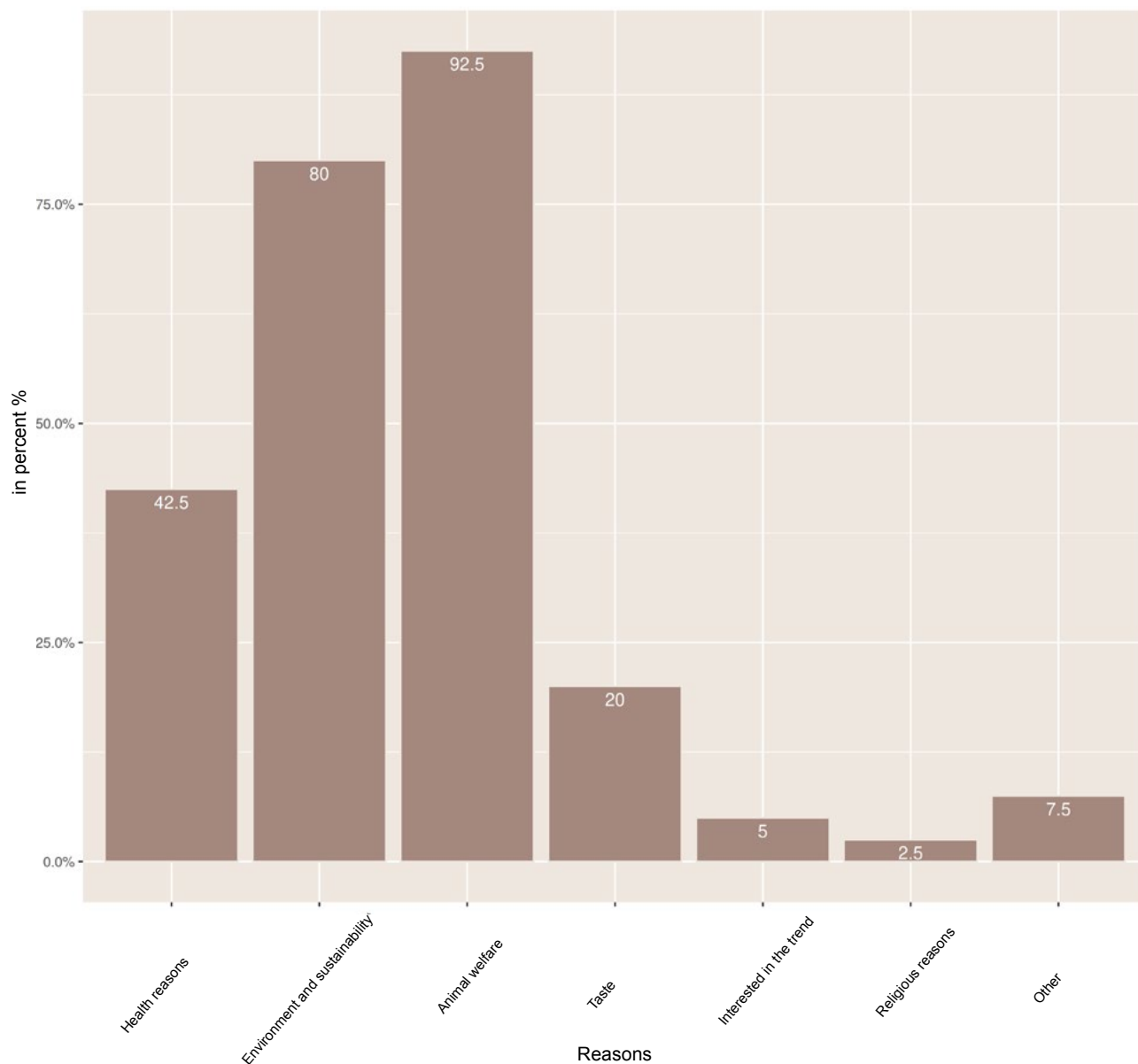
What type of vegan alternatives would you like to see more of?
Veganz asked, slovenian vegans answered.



Media

Source: Veganz Nutrition Survey

What are your reasons for eating vegan?
Veganz asked, slovenian vegans answered.

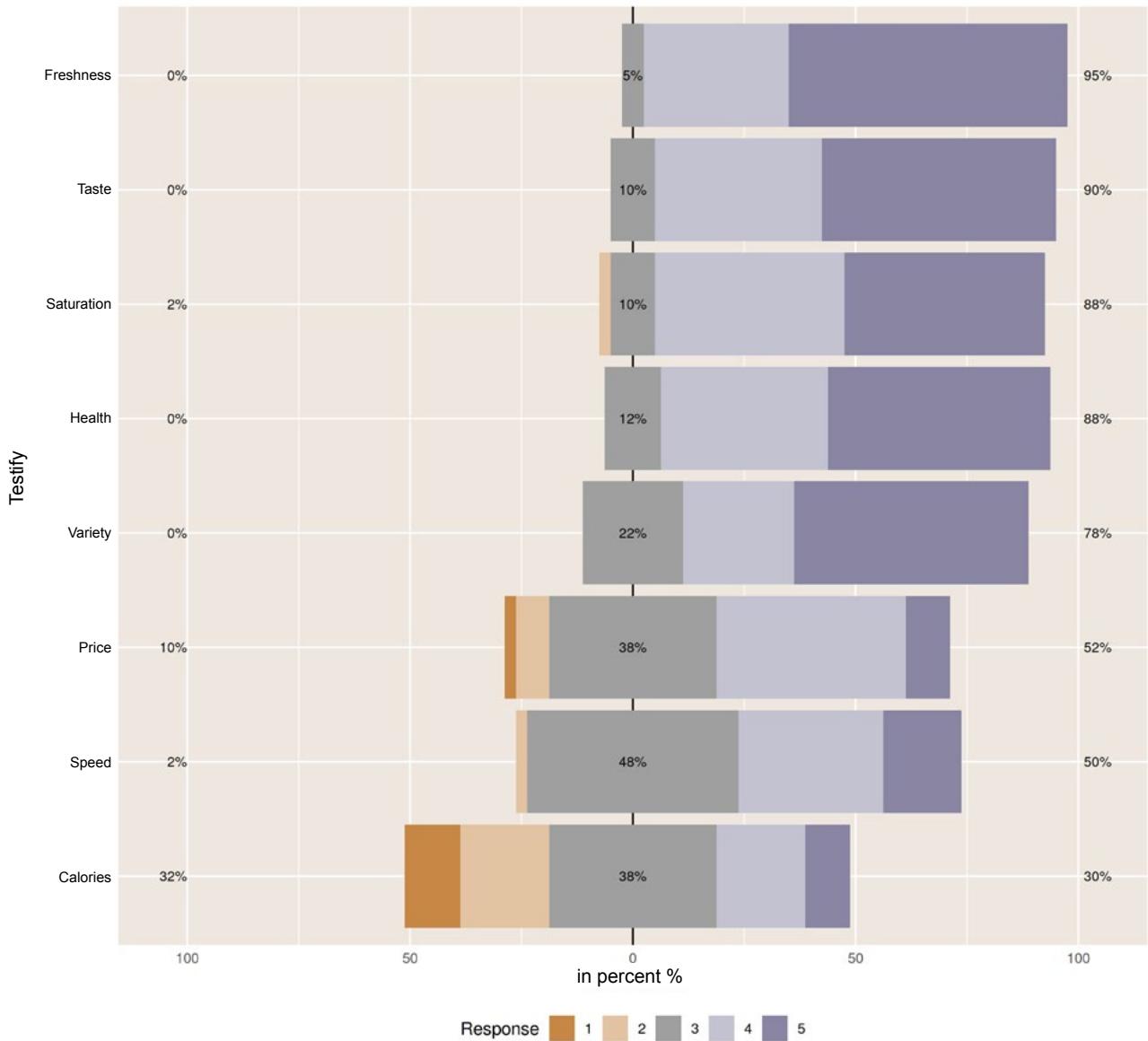


Source: Veganz Nutrition Survey

SLOVENIA

VEGAN

How important are the following factors to you when it comes to food?
 Scale of 1 "Very important" to 6 "Completely unimportant"
 Veganz asked, slovenian vegans answered.



Source: Veganz Nutrition Survey

GREAT BRITAIN

Net income distribution in the UK is relatively evenly balanced. At 21.2%, most Britons say they have an income of € 1,000 - 1,500 a month. The British vegans' main reason for a plant-based diet is animal welfare at 98%. A further 89% say environment and sustainability and 64% are motivated for health reasons. 12,5% are vegans because they prefer the taste.

More than half of British vegans cook daily. The rest prepare their own meals between 5 and 6 times a week. Very few cook less – vegans and the other nutritional groups alike.

Interestingly, social media and online blogs are the most popular outlets for information retrieval, both among vegans and within the other dietary forms. Non-vegans in the UK also attach great importance to direct interaction with friends and gathering information in the supermarket. Magazines, newspapers and television are also somewhat more popular among non-Vegans.

The British make their purchases mainly in the

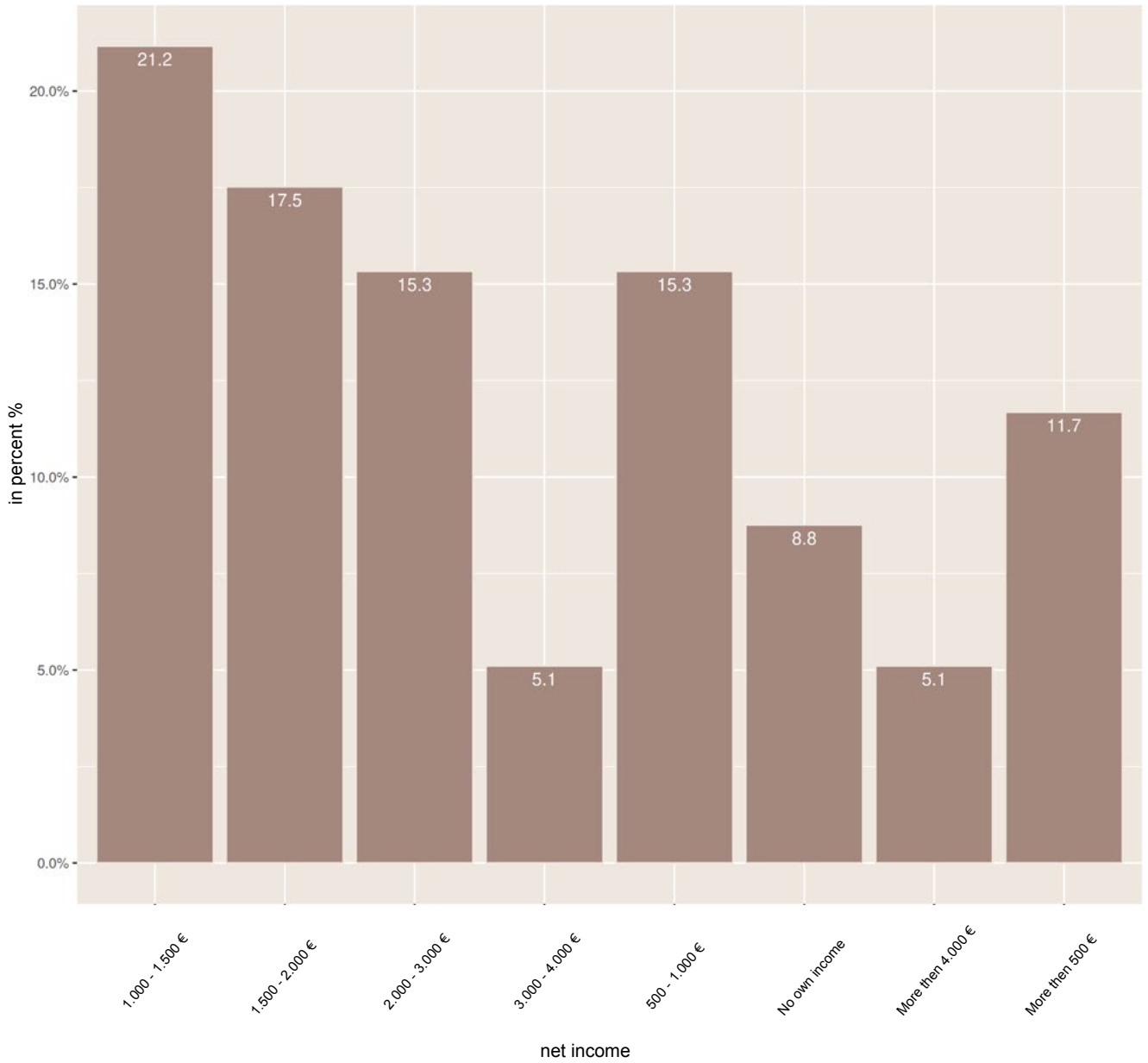
supermarket. Discount retailers and health food stores are also relatively popular. 27% of British non-vegans also order their food online - almost 17% more than vegans. When shopping, they pay particular attention to the taste and quality of their products. Sustainability, ingredients, freshness and price are also important to them.

Opinions on the factors of innovation, regionality, organic certifications and branded products are less clear. 84.4% of British vegan lack choice in the baked goods sector. Similarly, more than 40% feel that there is too little choice of cured meats and cheese alternatives, as well as ready-made and semi-ready products.

For both vegans and non-vegans, sustainability and environmental protection play an important role in food shopping. Non-vegans pay more attention to regionality, while British vegans have more confidence in quality seals and labels.

Opinions differ on the question of certified organic products.

What is your net monthly income?
Veganz asked, british answered.

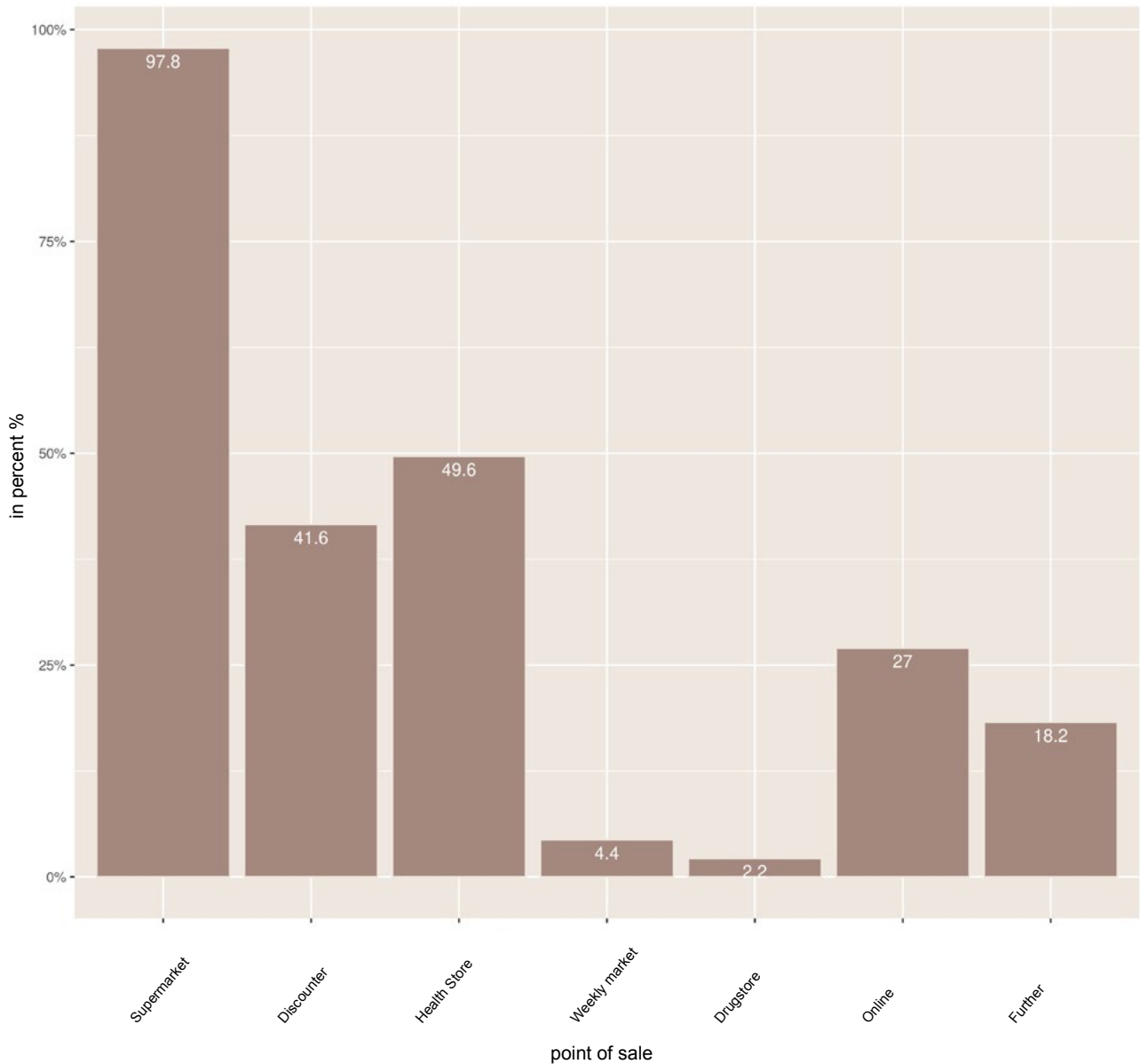


Source: Veganz Nutrition Survey

GREAT BRITAIN

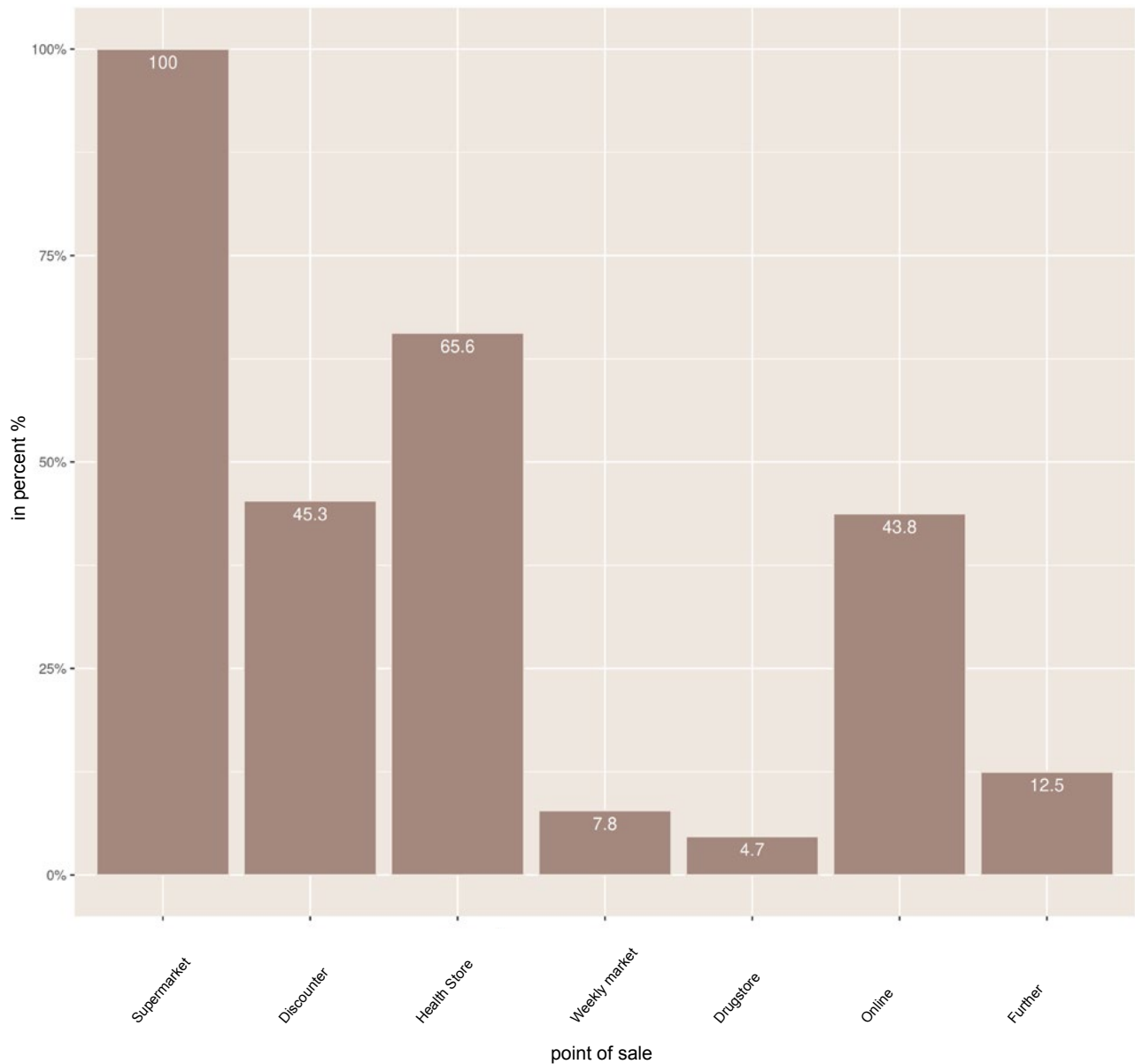
NON-VEGAN

Where do you buy food?
Veganz asked, british non-vegans answered.



Source: Veganz Nutrition Survey

Where do you buy food?
Veganz asked, british vegans answered.

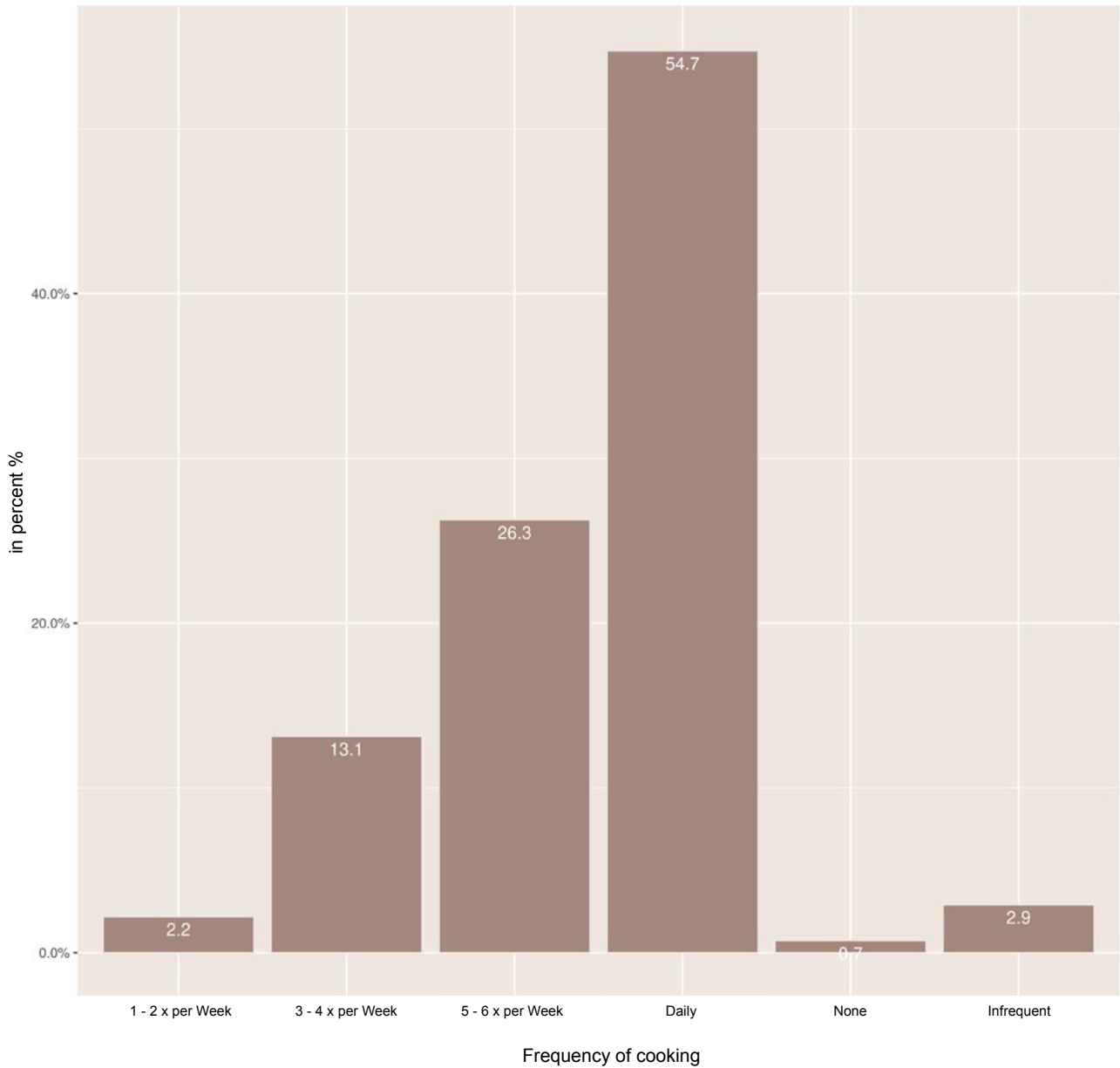


Source: Veganz Nutrition Survey

GREAT BRITAIN

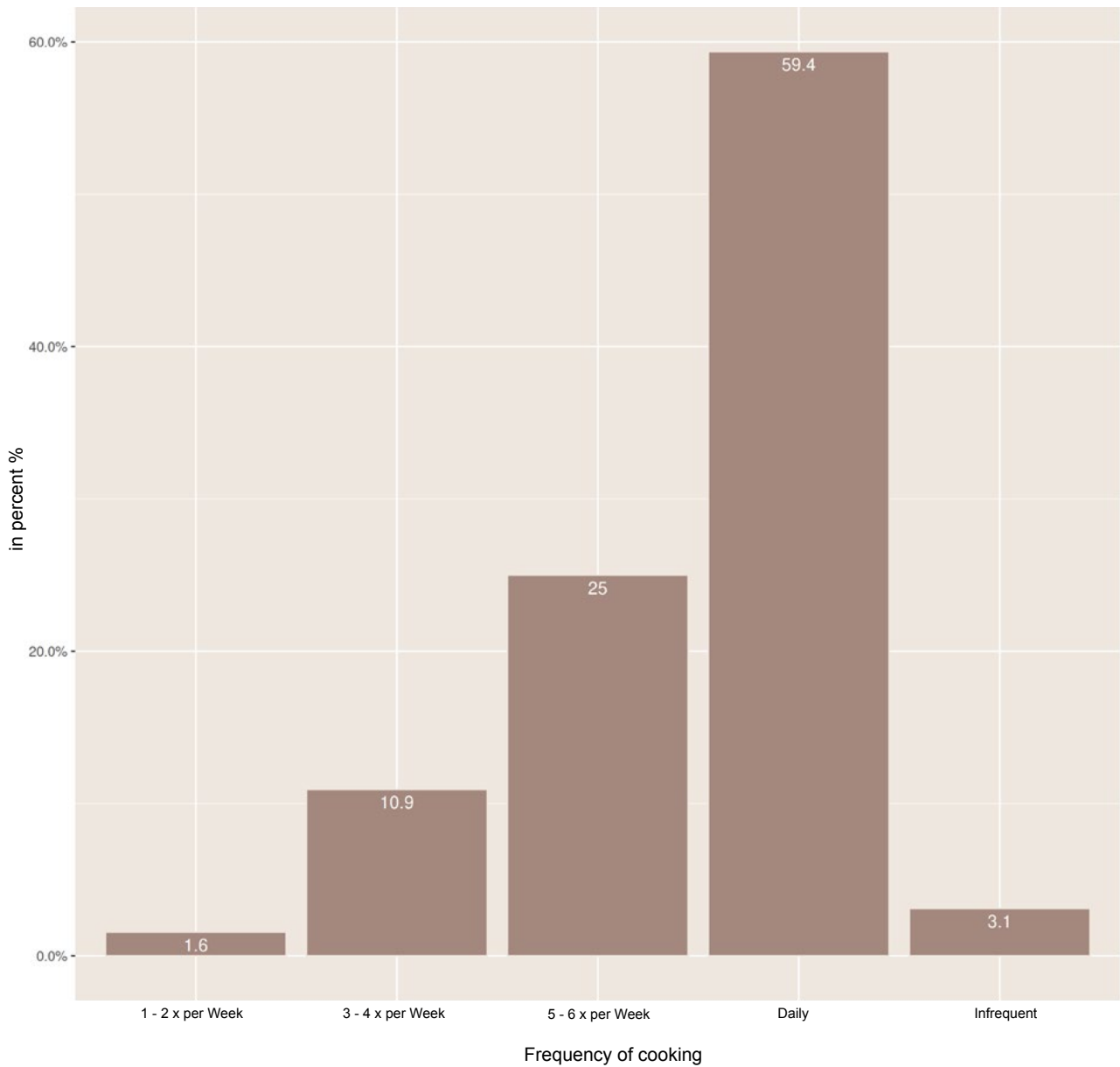
NON-VEGAN

How often do you cook?
VeganZ asked, british non-vegans answered.



Source: VeganZ Nutrition Survey

How often do you cook?
Veganz asked, british vegans answered.

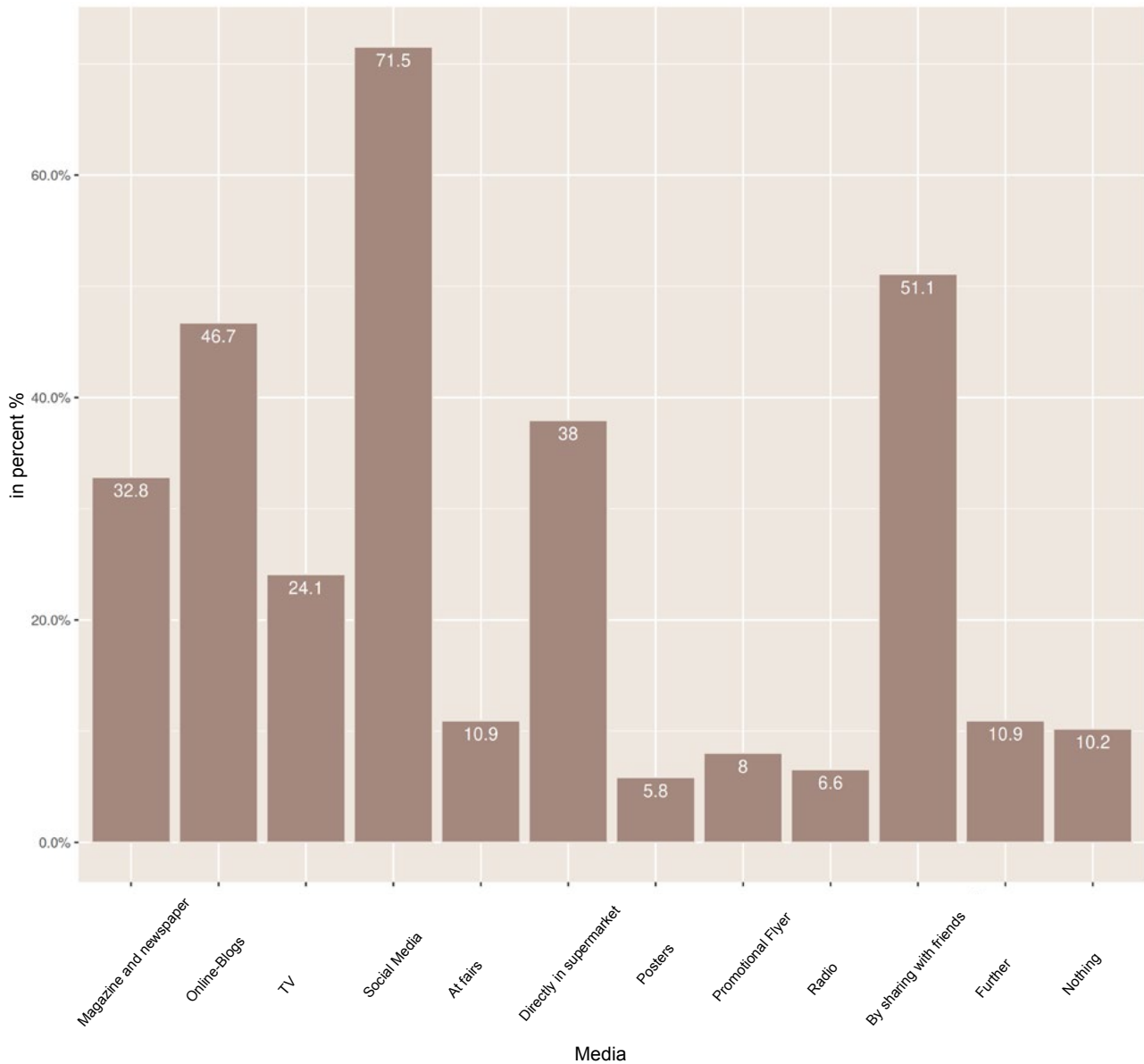


Source: Veganz Nutrition Survey

GREAT BRITAIN

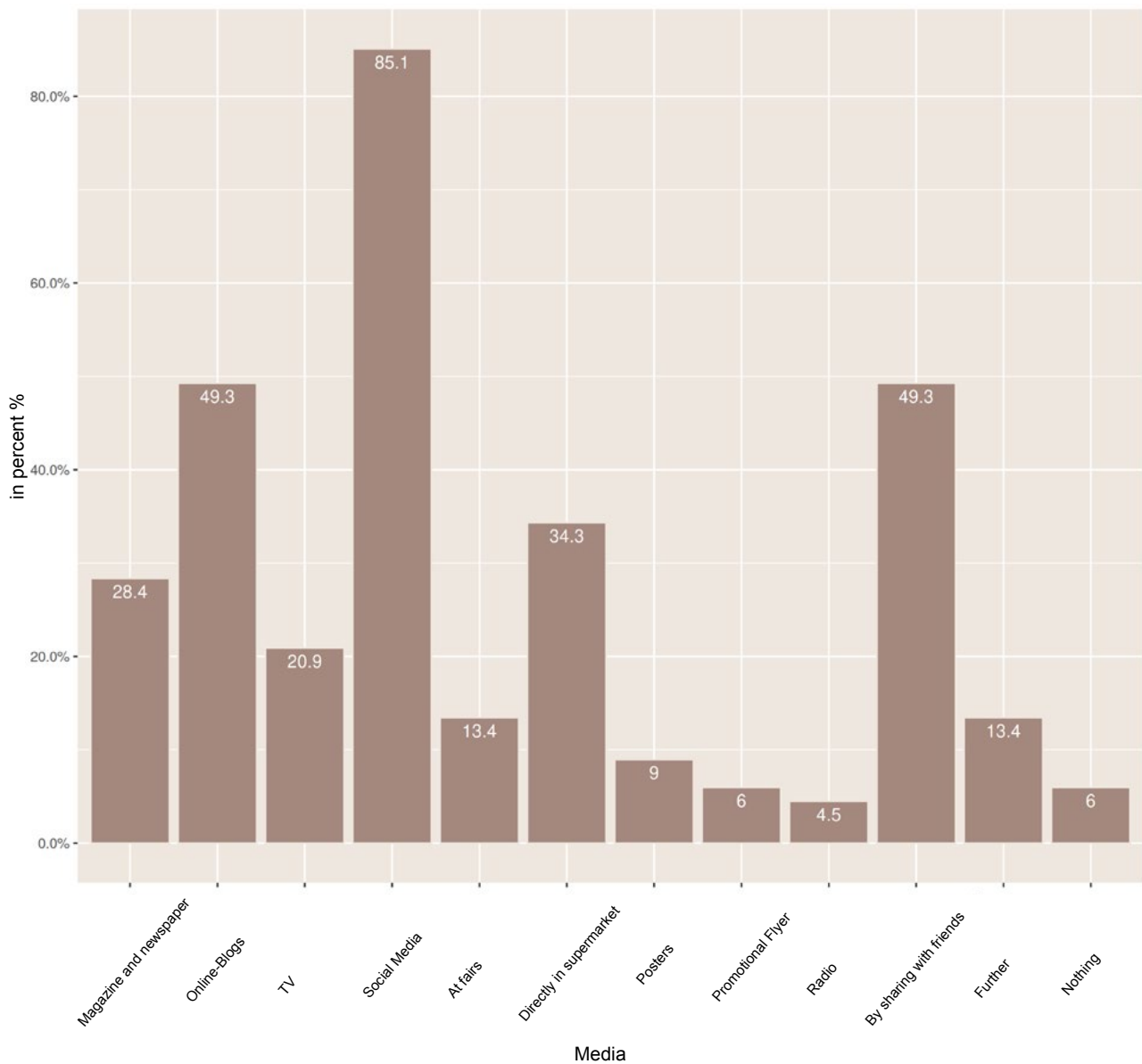
NON-VEGAN

Where do you find information about dietary trends and product innovations?
Veganz asked, british non-vegans answered.



Source: Veganz Nutrition Survey

Where do you find information about dietary trends and product innovations?
Veganz asked, british vegans answered.

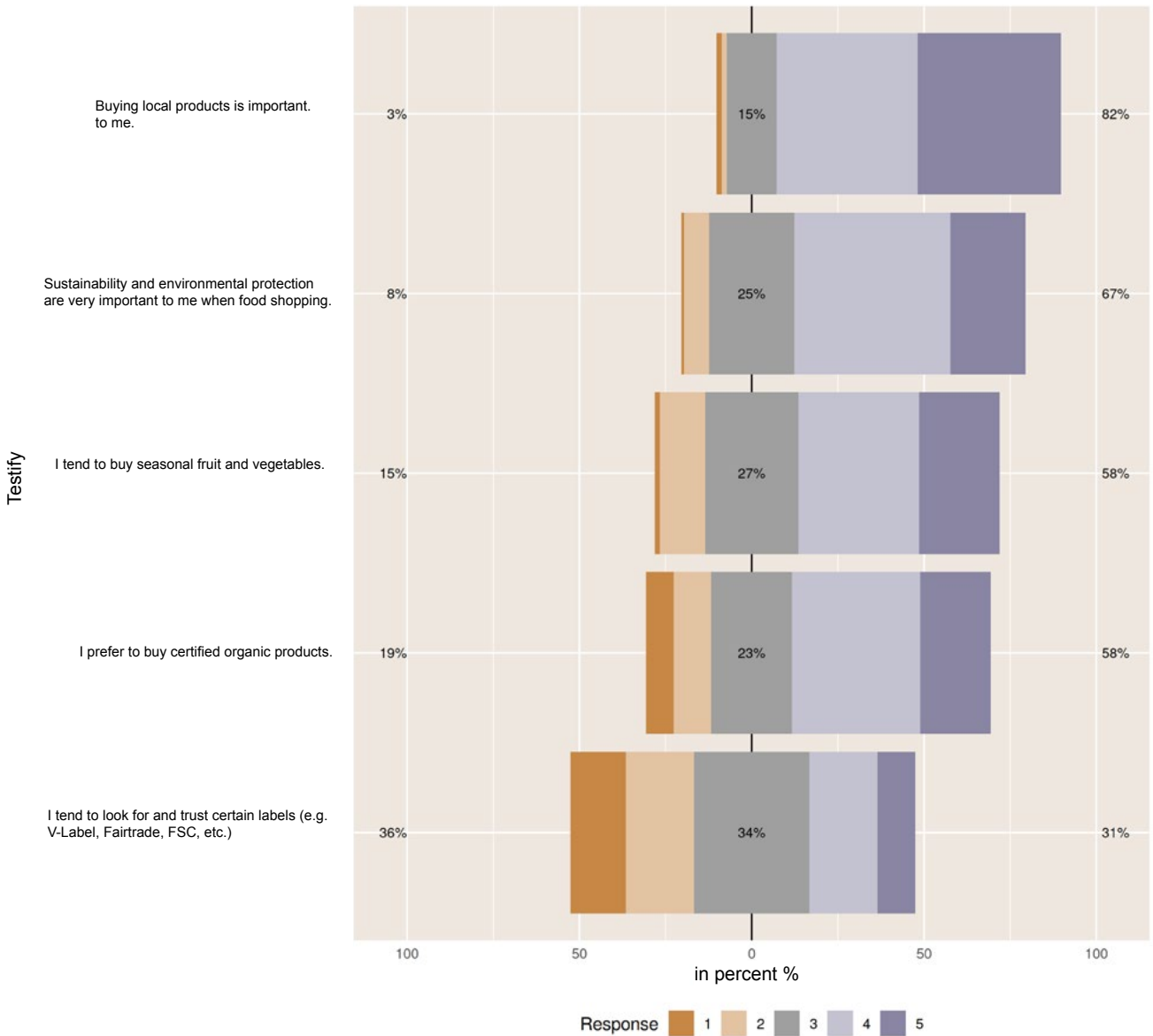


Source: Veganz Nutrition Survey

GREAT BRITAIN

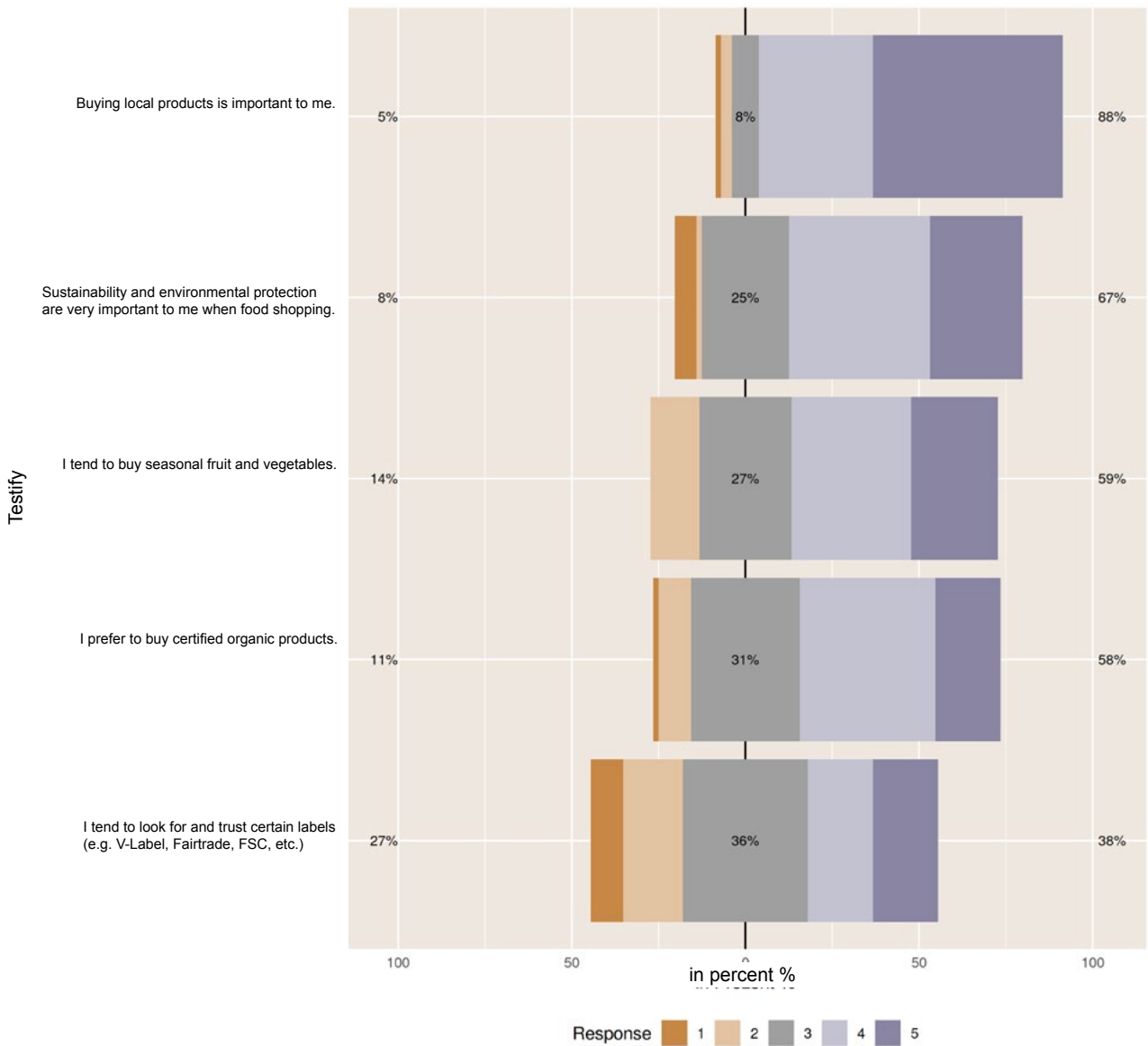
NON-VEGAN

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 Veganz asked, british non-vegans answered.



Source: Veganz Nutrition Survey

To what extent do the following statements describe you?
 Scale from 1 "Totally agree" to 6 "Totally disagree"
 Veganz asked, british vegans answered.

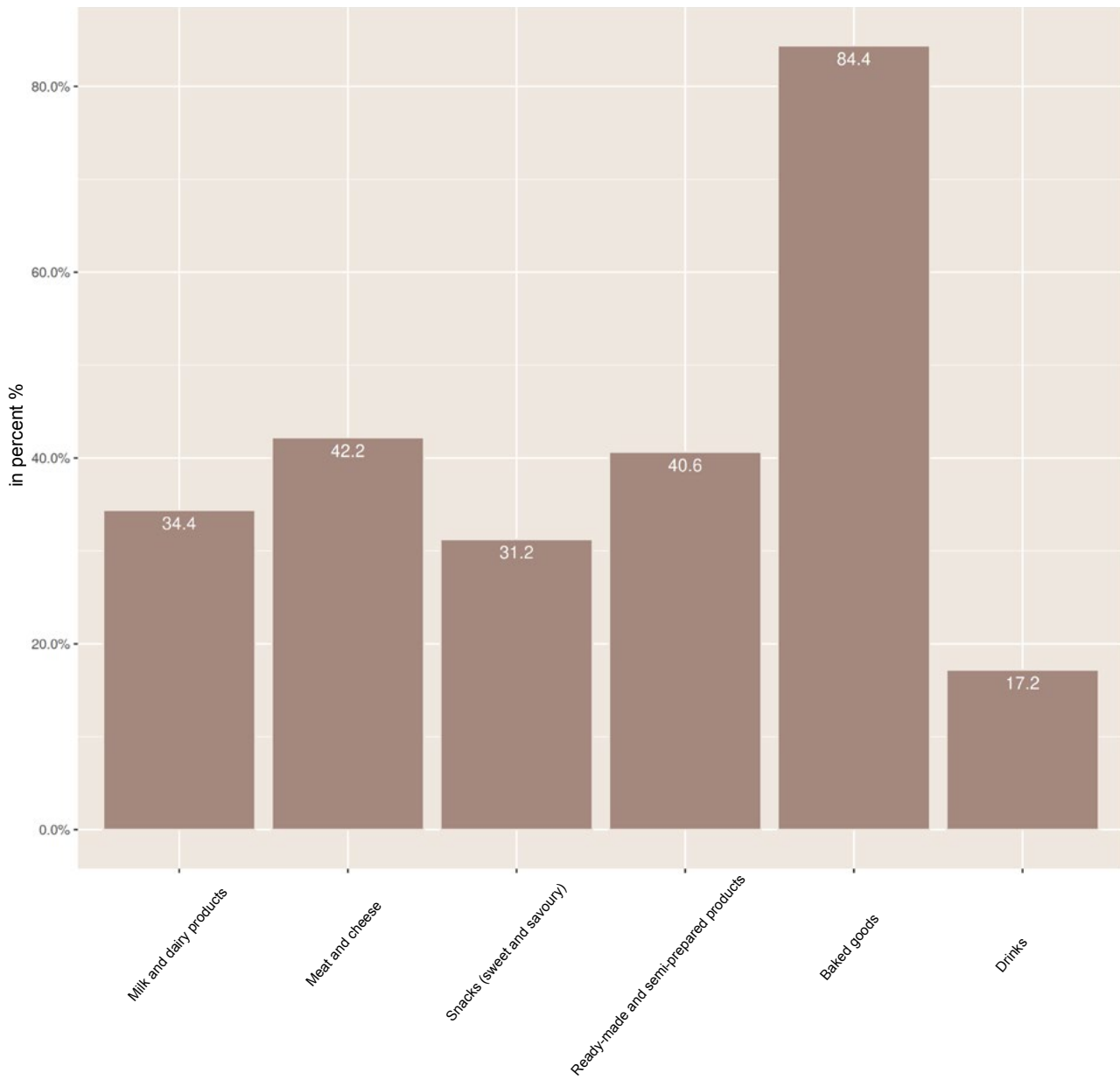


Source: Veganz Nutrition Survey

GREAT BRITAIN

VEGAN

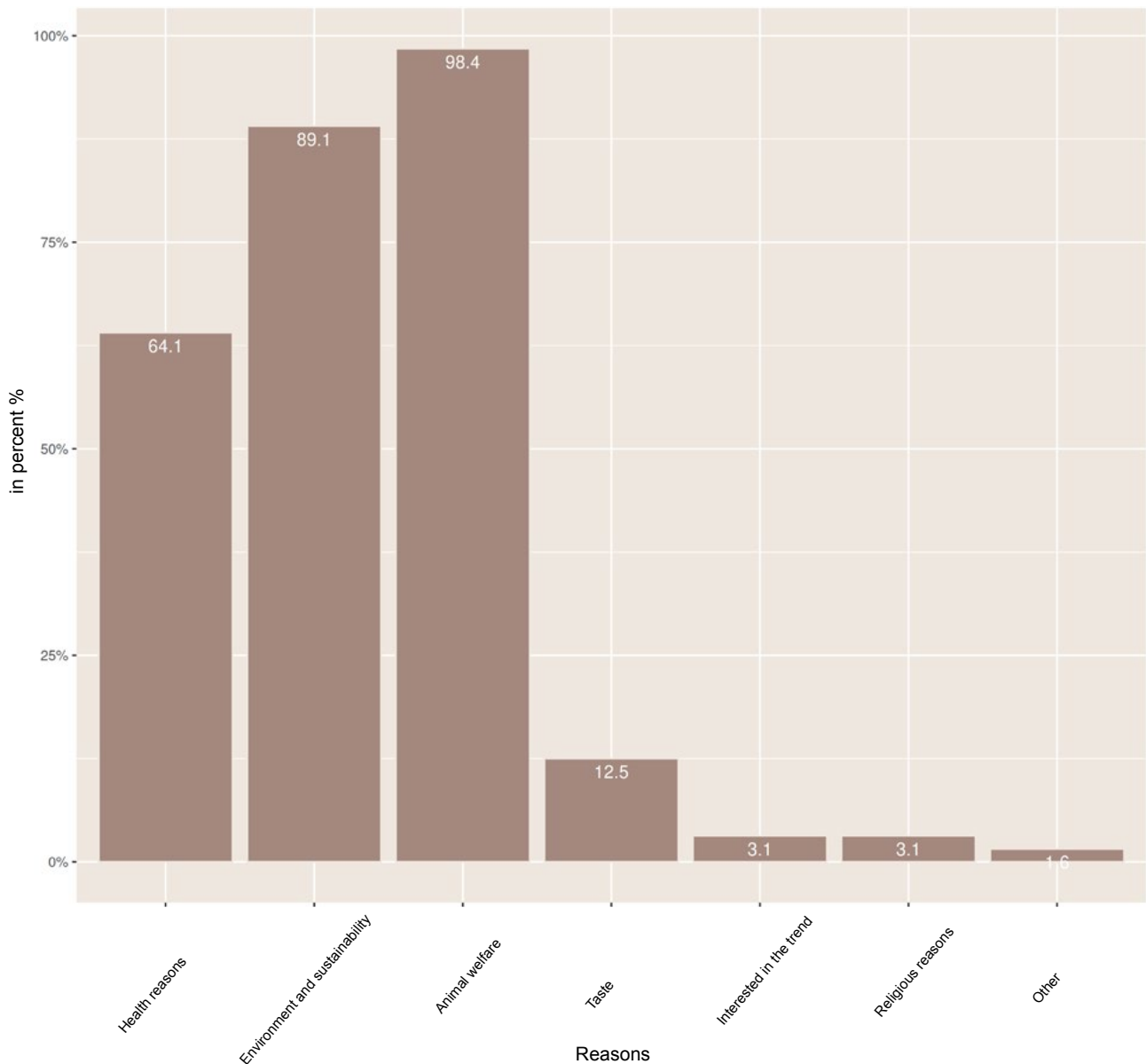
What type of vegan alternatives would you like to see more of?
Veganz asked, british vegans answered.



Media

Source: Veganz Nutrition Survey

What are your reasons for eating vegan? Veganz asked, british vegans answered.

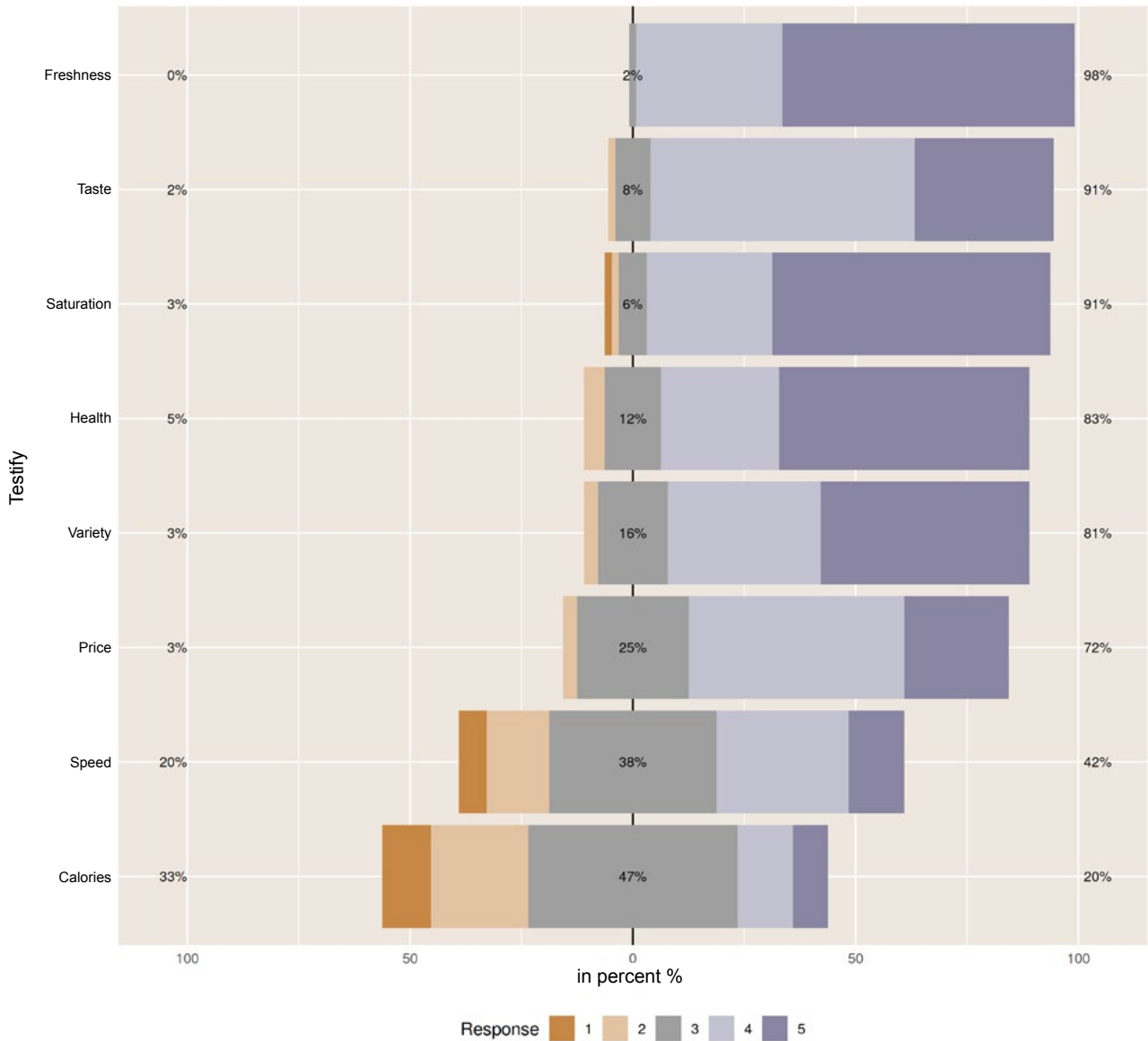


Source: Veganz Nutrition Survey

GREAT BRITAIN

VEGAN

How important are the following factors to you when it comes to food?
 Scale of 1 "Very important" to 6 "Completely unimportant"
 Veganz asked, british vegans answered.



Source: Veganz Nutrition Survey

FACT-SHEET

Concept and Survey Preparation: Veganz Group AG

Survey Period: 09.10.2019 - 23.10.2019

Publication: World Vegan Day 01.11.2019

Respondents: 24.160

Sample: 3.004

Error Margin: 0,1

Confidence Level: 95 %

Standard Variance p: 0,5

Z-Score: 1,96

Demographic: According to Eurostat age percentage 15 - 64 years per country surveyed, distribution m/f approx. 50 %

Countries: Germany, Switzerland, Austria, UK, Denmark, France, Greece, Italy, Spain, Croatia, Slovenia, Czech Republic, Portugal, Poland, Netherlands

Method: exclusive online survey

Distribution: The survey was shared via its own social media channels (Instagram and Facebook). Both as postings and paid advertisements. The Veganz logo and Veganz as initiator of the survey were visible at all times.

Evaluation: Veganz Group AG

Participating Countries (with sample share in %):

Germany (29,5)
Austria (5,5)
Switzerland (5,6)
France (5,2)
Spain (4,3)
Portugal (4,8)
Poland (9,4)
Netherlands (3,1)
England (4,6)
Greece (4,5)
Italy (6,7)
Denmark (3,1)
Czech Republic (4,4)
Croatia (5,5)
Slovakia (4,1)

Percentage of dietary patterns in each sample:

Vegan: 34,6
Omnivore: 23,5
Flexitarian: 21
Vegetarian: 15,1
Pescetarian: 5,8

LEGAL NOTICE

Veganz 2019

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