POSITIONS

Plant protein newsletter

N° 68 | October 2018

GEPV BAROMETER: REVIEW OF THE IMAGE CONVEYED BY PLANT PROTEINS

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62% of French consumers claim to buy plant-based products

What is French consumers' perception of plant proteins? This is the question that the GEPV (Group d'Etude et de Promotion des Protéines Végétales - Group for the Study and Promotion of Plant Proteins) goes some way to answering every two years thanks to its barometer, a survey conducted this year for the 4th time.
In the wake of the 2011, 2014 and 2016 surveys, this most recent barometer is focused in particular on the plant-based range of products (1)
A review of the main conclusions drawn from this consumer survey.

It was back in 2011, that the GEPV began conducting a survey every two years to assess French consumers' perception of plant proteins.
Consumption patterns, purchasing criteria, product awareness... about 40 questions are submitted online to a representative sample of 1,000 people.
The GEPV decided this year to specifically highlight the plant-based range of products, and included specific questions on this theme.

■ DIET-CONSCIOUS FRENCH CONSUMERS

The first lesson to be drawn from this barometer is that the French still claim to be as careful as ever about what they eat, first and foremost seeking a "varied and balanced" diet.
They eat fruit, vegetables and dairy products daily, meat and fish once or twice a week and snacks less frequently.
In the case of meat, 29% of the people surveyed were keen to reduce their consumption, citing health reasons in particular (60%) but also an increasing number of environmental considerations (51%, on the rise).
This 29% figure is still high but it has been falling after dropping in earlier surveys (32% in 2011, 35% in 2014, 39% in 2016).

> The list of ingredients is a key factor for 7 out of 10 French consumers.

The French are also concerned about the products they buy. The first thing they notice is always the price. But the list of ingredients is also important, mainly owing to food safety considerations.
Taste, authenticity (naturalness, GMO-free) and geographical origin are other key factors when it comes to choosing a product.

Finally, nearly 8 out of 10 French consumers are concerned about buying specific products (organic, dietetic, gluten-free), mainly in the case of organic products (73 %).

■ BETTER KNOWLEDGE OF PROTEIN SOURCES

The 2018 barometer highlights another continuing trend: the French are becoming more and more aware of food issues, as reflected in their knowledge of lupin, which might be the the most little-known ingredient in the list shown to respondents but people are becoming increasingly aware of this ingredient with each passing year: while 65% of French consumers were unfamiliar with this ingredient in 2011, the figure was down to 39% in 2018.

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Knowledge about the protein content of products is also changing, with the majority of respondents considering that a product is high in protein if it contains more than 15% protein.

It is important to remember that the regulatory threshold for the claim "rich in protein" is based on the proportion of protein in an energy intake and requires that a minimum of 20% of the latter be provided by proteins (Regulation (EC) No 1924/2006).

According to French consumers the three products with the highest content are still meat, eggs and fish, but leguminous plants, at the bottom of the list, are gaining ground (34% of respondents mention them, compared to 31% in 2016 and only 16% in 2011).

More specifically, it is lentils, followed by soya, then dried beans and broad beans, which are regarded as high-protein foods.

■ ANIMAL PROTEINS REMAIN THE MOST POPULAR

However, animal proteins remain the French people's favourite, owing to consumption patterns and taste, while people are becoming more negative about the taste of plant proteins

This is the main reason for not buying plant alternatives to animal proteins, closely followed by consumption patterns.

A better perception of this flavour factor - as well as more competitive prices - would encourage the French to buy more plant-based alternatives.

Conversely, plant proteins continue to have a better nutritional image than animal ones.

This might be the reason why half of respondents say they are willing to pay up to 10% more for a plant protein-containing product, while more than a third would not.

Finally, 20% say they consume protein-enriched products. Mainly because they are more energizing and more suitable for sports activities.

■ PLANT PROTEINS: STILL ENJOYING A GOOD IMAGE BUT COULD BE IMPROVED

While the majority of French people still believe that plant proteins are beneficial to health (88%), complementary to animal proteins (77%), good for the environment (76%), natural (68%) and associated with quality (65%), they are fewer in number them than in earlier surveys (94%, 85%, 83%, 75% and 78% respectively in 2016).

Plant proteins are still relatively unknown to 79% of respondents (compared to 83% in 2016) and only 25% find them cheap, compared to 42% in 2016.

In other words, an image that remains positive, but needs to be strengthened.

An average score of 6.1 out of 10
Down on 2016, the average score for plant proteins is 6.1 out of 10

On closer examination, this image is highly diversified according to the consumer profiles. Women, young people aged 18-24 and the inhabitants of Ile-de-France are the ones who perceive plant proteins the most positively. Conversely, the perception is not as high among people aged 50 and over, people in the upper socio-professional categories, people living in the Sud-Ouest region and men.

■ 62% OF FRENCH CONSUMERS BUY FROM THE PLANT-BASED RANGE OF PRODUCTS

What about the plant-based range of products?

62% of French consumers say they buy them: 9% often, 25% from time to time and 28% rarely.

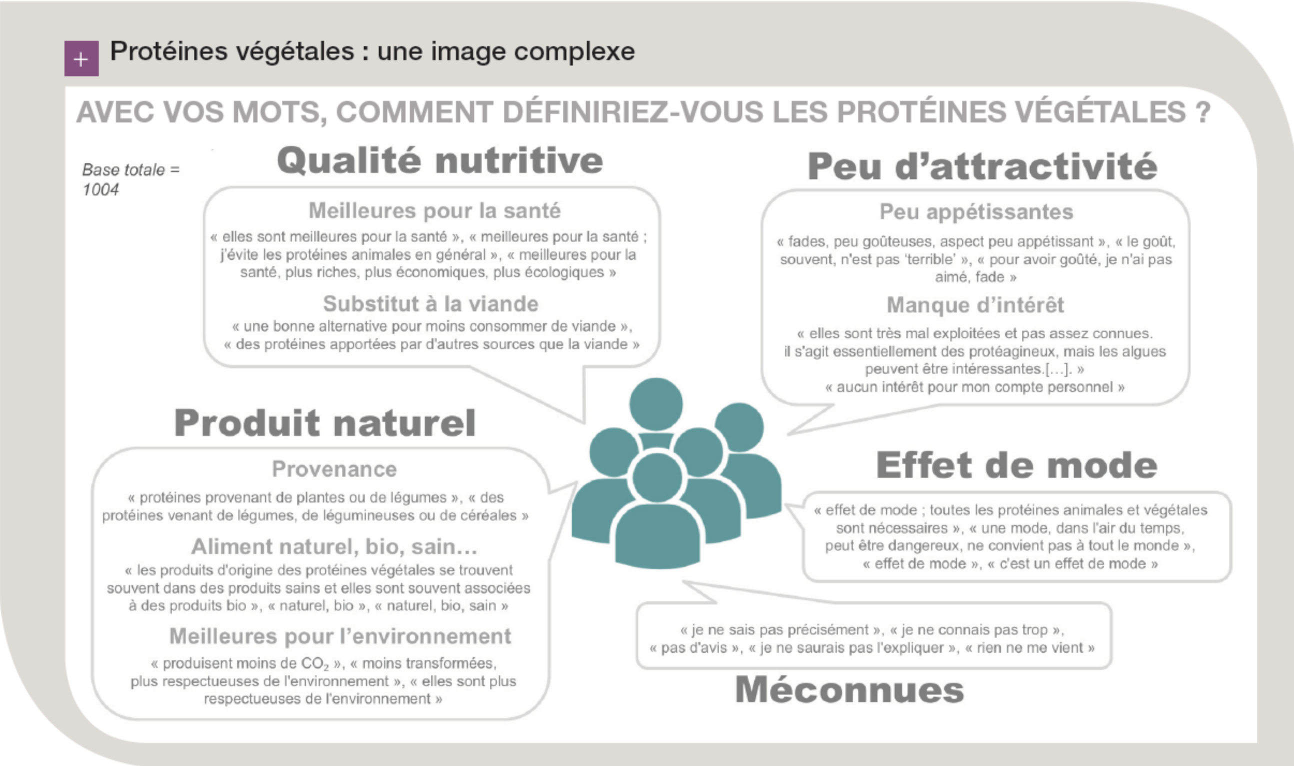
They mainly buy them in large supermarkets (82%).

In relative terms, the profiles of purchasers vary relatively from one type of product to another. As is the case with plant proteins. However, there is an over-representation of women, young people aged 18-24, inhabitants of the Ile de France region and people in the upper socio-professional categories.

The most popular products are plant-based steaks (38% have already purchased them), plant-based drinks (31%) and ready meals (25%), unlike plant alternatives to cheese (5%) and vegetarian deli meats (5%).

These products are widely consumed during meals, except for plant-based beverages (57% of people consume them between meals) and nutritional bars (86%).

Desserts made from plant-based ingredients are generally eaten alone but steaks (and similar products) are mostly eaten with a side dish.



> The most commonly purchased plant-based products are in the form of steaks, beverages and convenience foods.

■ PRODUCTS THAT ARE APPRECIATED...

The taste, texture and appearance of a product are predominantly appreciated for all types of plant-based products, with a lower score for plant-based alternatives to cheese.

Conversely, the price comes in for quite a bit of criticism. The main criteria for purchasing these products are taste (45% of buyers), the possibility of replacing meat/fish (44%) and helping people to "eat a varied diet" (43%), as well as the nutritional qualities (42%).

The value for health is the first factor mentioned, ahead of curiosity and environmental concerns.

More than 75% of people buying plant-based products say they are willing to buy them again, probably or definitely.

The score is slightly less for plant-based alternatives to cheese (71%) and cold meat products (65%), but up to 87% for desserts made from plant sources.

■ ... BUT STILL SOME RELUCTANCE

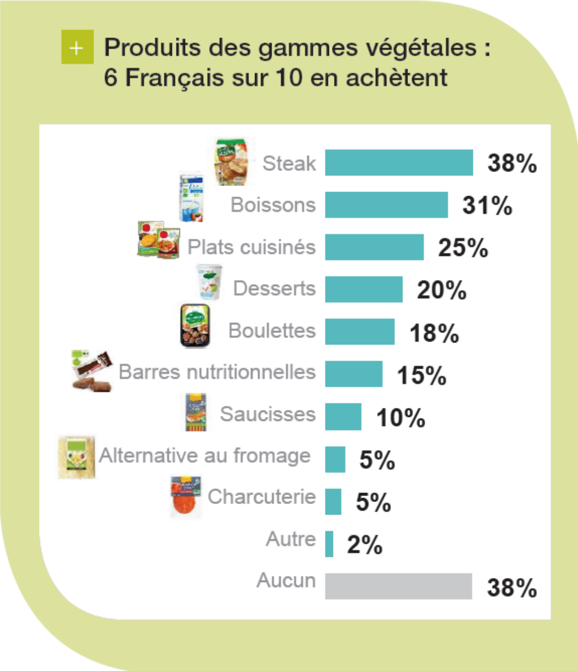
As for why 38% of respondents are reluctant to buy plant-based products, 48% say they do not consume this type of product in general. More specifically, they do not buy them for reasons of taste (34%), because they find these products overly processed (29%), because they are not used to them (28%) or because of the image conveyed by these products (27%) - a factor that still needs further investigation.

■ CONSUMER EXPECTATIONS?

In order to identify consumers expectations, the GEPV asked them how they interested they would be in several types of new plant-based products: plant proteins to be used in making a recipe, "table proteins" to be sprinkled on dishes or a combined plant and animal protein product. 55%, 39% and 45% respectively of respondents expressed an interest in the various options.

■ FOCUS ON COMBINED PLANT AND ANIMAL PROTEIN PRODUCTS

In the case of products combining plant and animal proteins the decision to buy this type of product is rather vague since 40% of those questioned do not know if they are concerned by these items:
15% of the 21% who reported having purchased them said they did so unintentionally.
Respondents who indicated an interest would be mainly keen on them in ready meals (65%) and meat (51%), primarily for nutritional (55%) and health (47%) considerations but also to discover new products (43 6).
They expect a similar amount of animal and plant proteins in this type of product.
These products are not associated with any negative feelings but do not generate much enthusiasm either.
For the 44% who say they are not interested in imitation animal protein and plant proteins, the main reason given is that they are "too artificial" (56%).



■ MATERIALS OF PLANT ORIGIN IN DIFFERENT TYPES OF PRODUCTS

As for materials of plant origin (MPO [2] being included in products, the French say they are ready to eat items containing them in the case of pastry/bakery products (64%), ready meals (63%) and dairy products (57%), but less in meat (48%) and delicatessen products (48%).
When asked more specifically about the type of MPO they would be interested in, this varies according to the type of product: leguminous plants in prepared dishes, wheat and yeast in pastry, algae and soya in health products.

■ IMPORTANCE OF THE TERM "NATURAL"

As for the names used to indicate MPO-containing products, while the terms "flour" and "proteins" are known and rather well accepted (deterrents for less than one in four French people), "concentrate" and "isolate" are unknown (for 38% and 48% of respondents) or even constitute a deterrent (for 31% and 28%). The same applies to manufacturing processes: fermentation and crushing are considered natural for a large majority of respondents, and enzymes for 55%. Concentration, on the other hand, is met with a more mixed reception: 47% see it as a natural process but 36% as quite the opposite.
As for the terms "technological auxiliary", "extrusion" and "nanomaterials", they are not very well known (1/4 of French people do not know what they are) or are considered as unnatural.

■ LESSONS TO BE DRAWN FOR THE SECTOR

A still complex and sometimes confusing picture: plant proteins have not yet managed to win the hearts of all French consumers.
The taste, or at least the perception thereof, still needs to be improved, while the processing methods have to be spelled out so they can fully benefit from the positive images they continue to convey (nutritional, environmental and other qualities).

1 Plant-based range of products: Product ranges containing plant proteins
2 MPO: materials of plant origin are intermediate food ingredients derived from protein-rich plant species

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