

THE ORKLA SUSTAINABLE LIFE BAROMETER

Executed by Ipsos for Orkla

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GAME CHANGERS



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RESEARCH OVERVIEW



METHODOLOGY

Quantitative web study among the population in the Nordic and Baltic countries.

The study contained mainly closed end questions, supported by one open end question to better understand consumers interest in the concept.



TARGET GROUP

Age: 18+

Representative for population in each country.

Results are representative based on gender, age and region.



SCOPE

Sample: Total 7000 respondents in Norway, Sweden, Denmark, Finland, Estonia, Latvia and Lithuania. 1000 respondents in each country.

Interview length: 9 minutes.

Fieldwork was conducted in October 2019.

EXECUTIVE SUMMARY

1

EXECUTIVE SUMMARY

CLEAR DIFFERENCE BETWEEN NORDICS AND BALTICS

The study shows a clear difference between the Nordics and the Baltics.

There are generally higher levels of concern for environmental issues, more positive attitudes towards sustainability and more environmentally friendly dietary habits in the Nordic region.

SOME DEMOGRAPHIC TRENDS AS WELL

The same difference is found between age groups and sex.

Younger people and women are more concerned, they have more positive attitudes and more environmentally friendly habits. They want to eat less meat, and use less plastics.

DIFFERENCES BETWEEN NORDIC COUNTRIES

Within the Nordic region there are also some differences in the observations.

Sweden has generally the most environmentally concerned respondents, which is evident in the questions regarding attitudes towards environmental issues, habits regarding both recycling and dietary choices.

OMNIVOROUS VS VEGETARIAN

Sweden also has the lowest share of omnivores (eating both animal and non-animal products).

Along with Finland, they have purchased or tasted vegan/vegetarian substitutes to conventional products far more often than other countries. Attitudes towards vegetarian habits is also quite positive in Finland.

EXECUTIVE SUMMARY

CLIMATE SKEPTICISM

There are more complex patterns to this picture as well.

Sweden also has the highest share of respondents that are skeptical to the idea that the world is facing a major climate crisis; 1 in 4 swedes agree to the statement "I **don't think** the world is facing a major climate crisis", which is on par with the Baltics, but far higher than in the neighboring Nordic countries.

FINLAND MOST POSITIVE TO SUBSTITUTES, BUT NOT THEIR LABELING

While Finland has high shares of respondents having tasted or purchased vegan/vegetarian alternatives to conventional products, they also have the highest resistance towards labeling them "Hot dog, oat milk, etc.".

Finns also have the highest share of people wanting to eat more vegetarian foods.

CONCERNED ABOUT SUSTAINABILITY

In the Nordic region, there is consistently high amounts of people that find it hard to know whether products are "sustainable" or not.

They also find it hard to know whether product packaging can be recycled or not (Sweden less than others).

The respondents are divided on the question of being more willing to pay more for bio-degradable plastics, but they are generally positive to buy products where the packaging is made from recycled plastics.

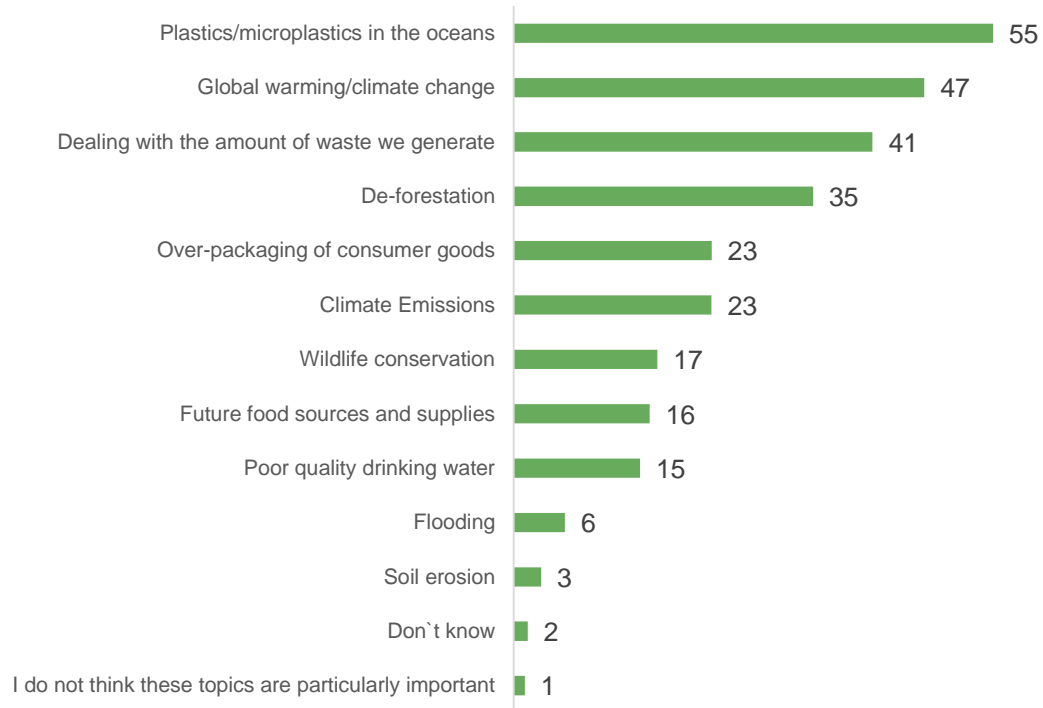
REPUTATION

Most respondents have an impression of Orkla as a "large company" followed by "Norwegian company", "Strong brands", "Multinational company" and "high quality products". Positive impressions of Orkla regarding specific themes is mostly equal in all countries, and between 18-25 % of the respondents in each country have a favorable impression of Orkla on these topics, but respondents in Estonia and Latvia have a better impression of Orkla regarding sustainability. The share of respondents answering "Don't know" is generally quite high on all topics, and on average about 40 % don't have a specific impression.

ATTITUDES TOWARDS SUSTAINABILITY

2

PLASTICS AND GLOBAL WARMING ARE CONSUMERS MAIN CONCERN



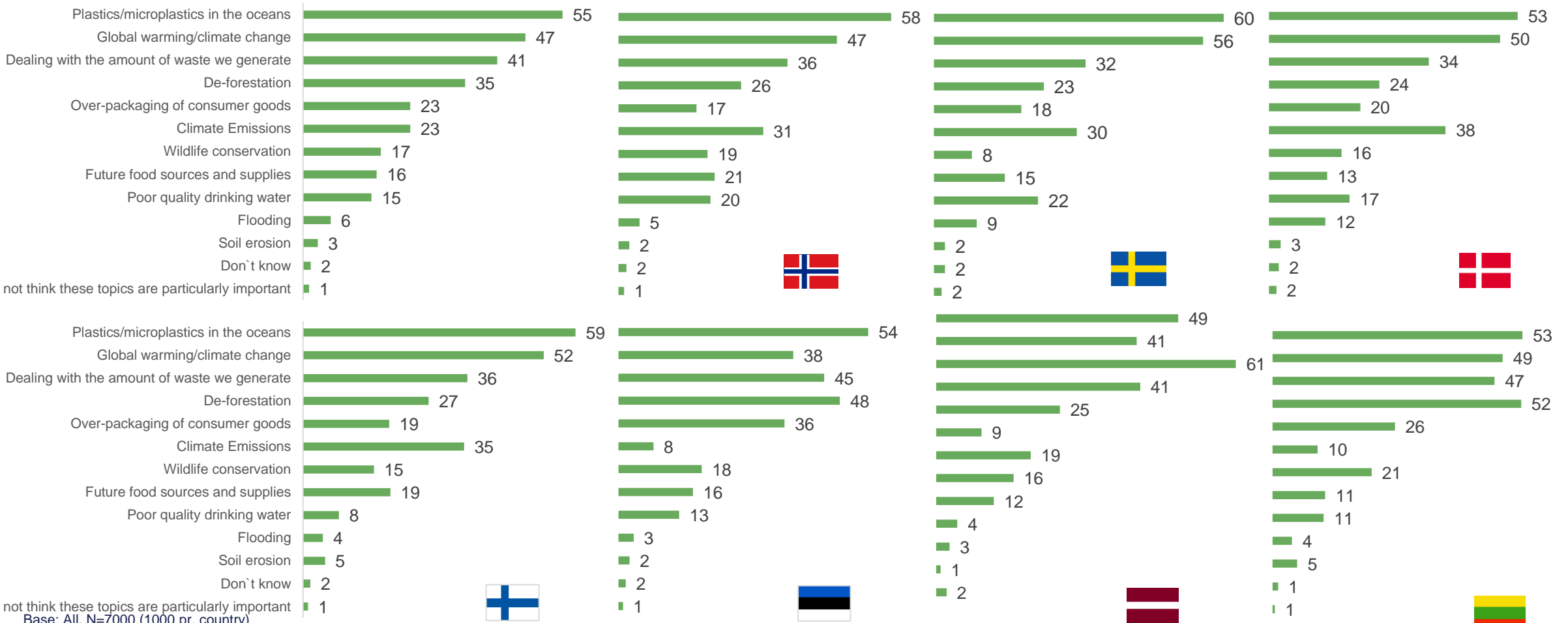
More than half state that plastics or microplastics in the oceans are one of the three most important environmental topics we are facing today. Next is global warming/climate change, followed by dealing with the amount of waste we generate.

There are no significant differences between sub-groups.

Base: All, N=7000 (1000 pr. country)

Q1.1. In your view, what are the three most important environmental topics we are facing today? That is, the top environmental topics you feel should receive the greatest attention?

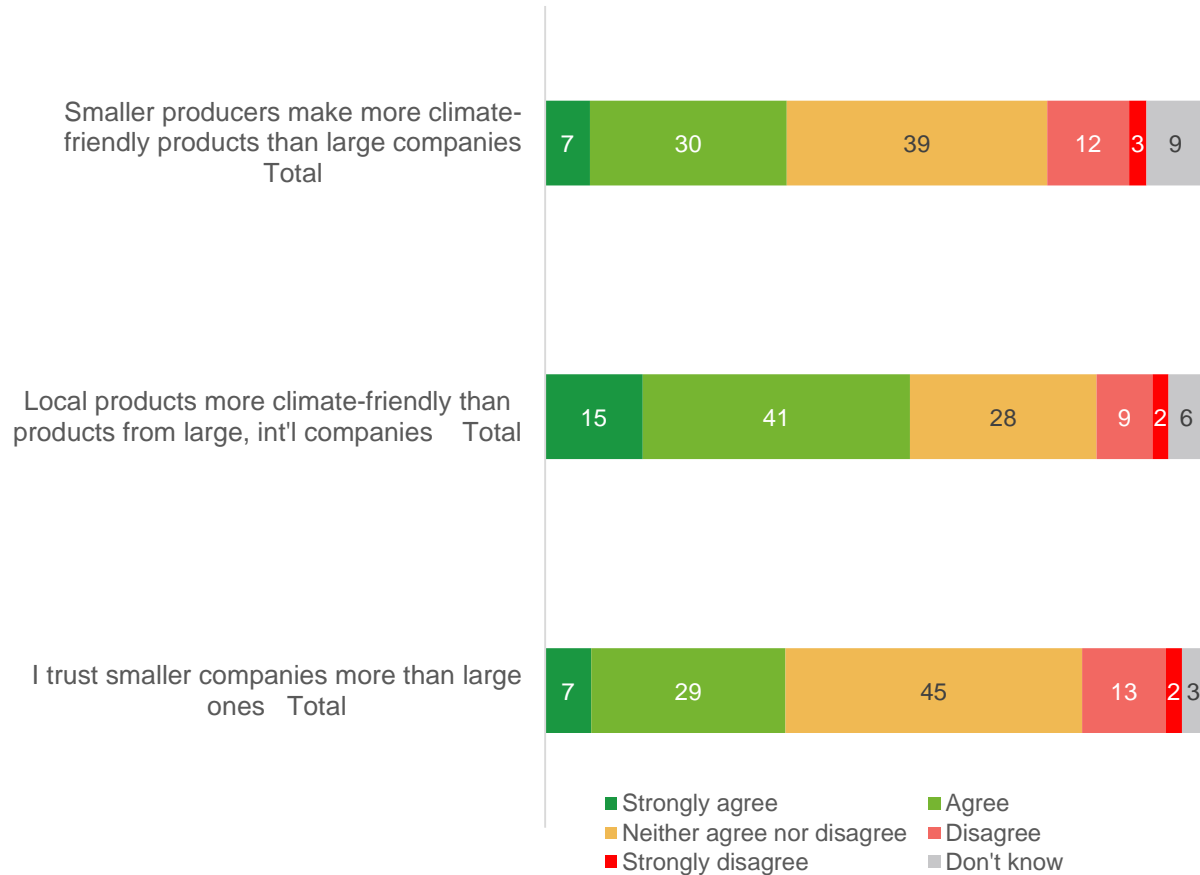
PLASTICS AND GLOBAL WARMING ARE CONSUMERS MAIN CONCERN



Base: All, N=7000 (1000 pr. country)

Q1.1. In your view, what are the three most important environmental topics we are facing today? That is, the top environmental topics you feel should receive the greatest attention?

Consumers see smaller producers and local products as more climate friendly



- More than one third of the sample selection agrees with the statement that products by smaller producers are more climate-friendly than products by large companies.
- More than half of the population agrees with the statement that local products are more climate-friendly than products made by large, international companies.
- More than 1 out of 3 agree with the statement that they trust smaller companies more than larger ones. 45 % neither agree nor disagree with the statement.

Base: All, N=7000 (1000 pr. country)

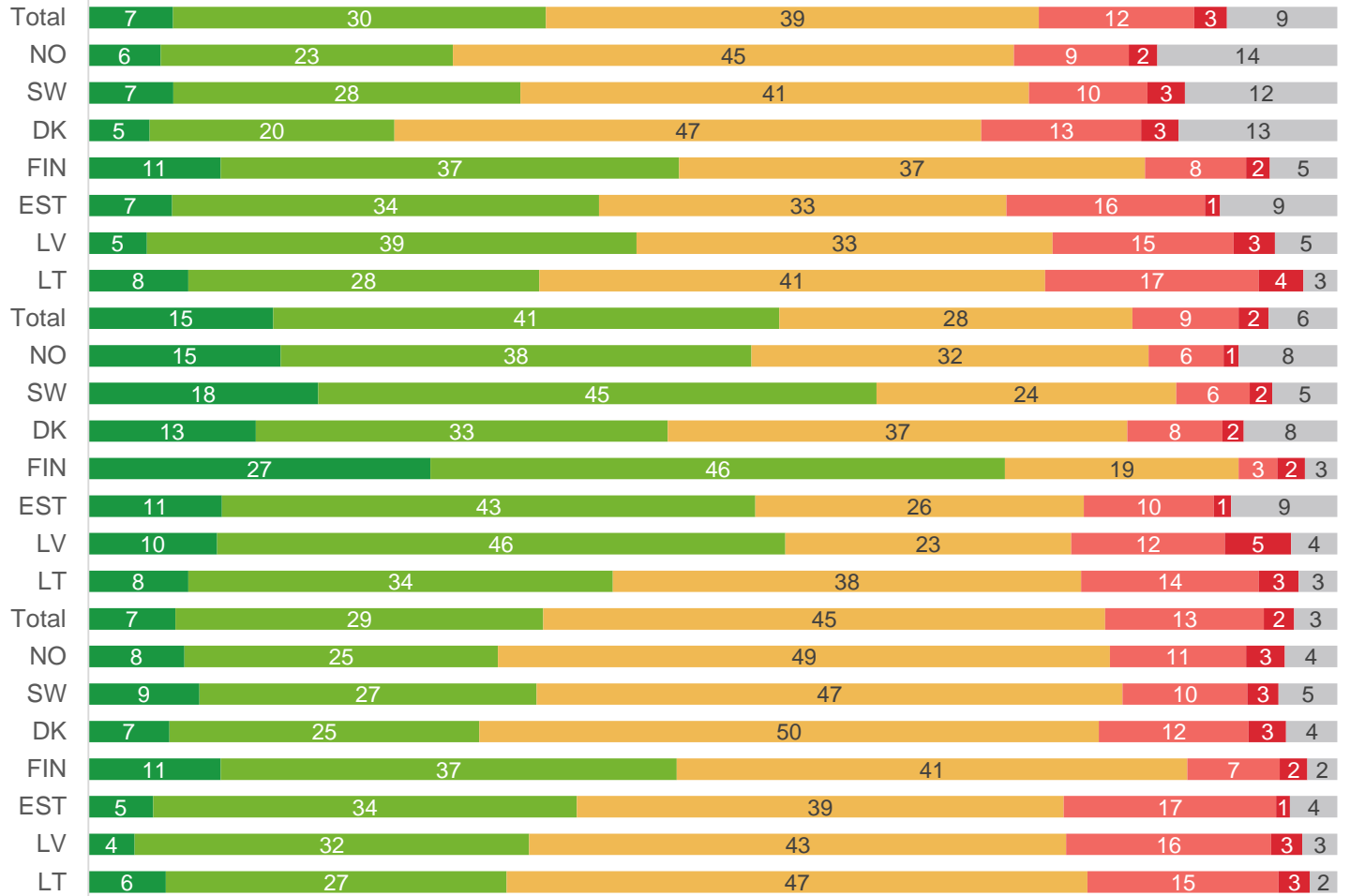
Q1.2 To what extent do you agree or disagree to these statements?

Country breakdown

Smaller producers make more climate-friendly products than large companies

Local products more climate-friendly than products from large, int'l companies

I trust smaller companies more than large ones



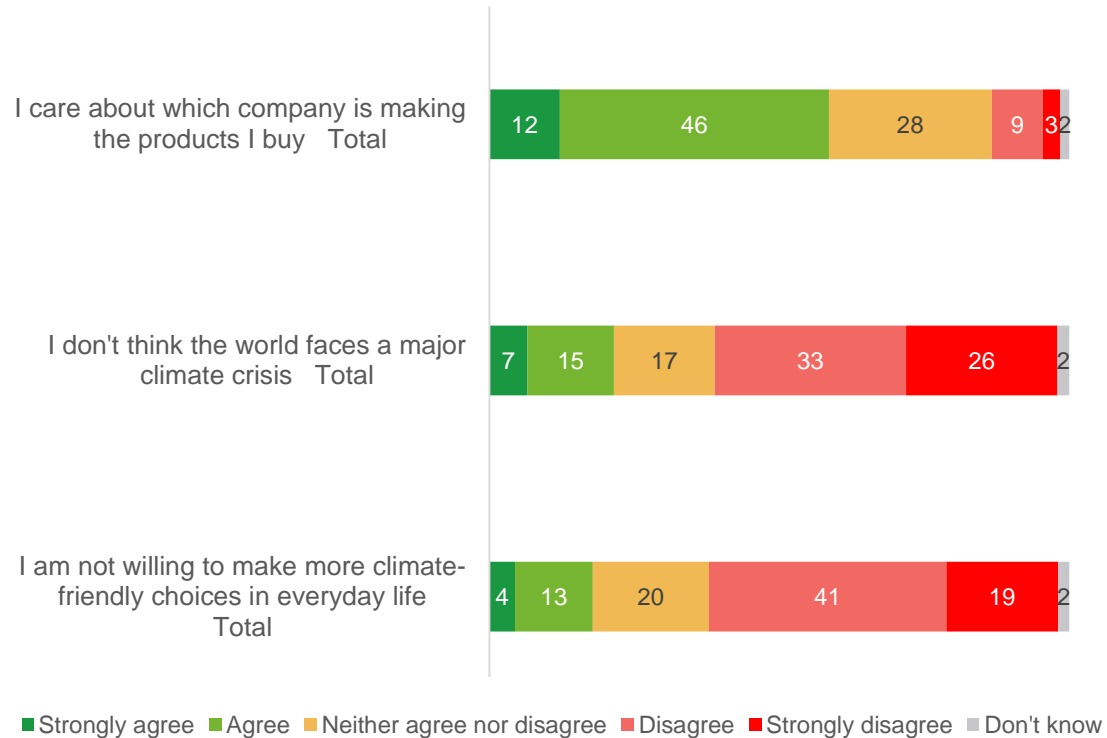
■ Strongly agree
 ■ Agree
 ■ Neither agree nor disagree
 ■ Disagree
 ■ Strongly disagree
 ■ Don't know

Base: All, N=7000 (1000 pr. country)

Q1.2 To what extent do you agree or disagree to these statements?



Consumer care about what company makes the products they are buying



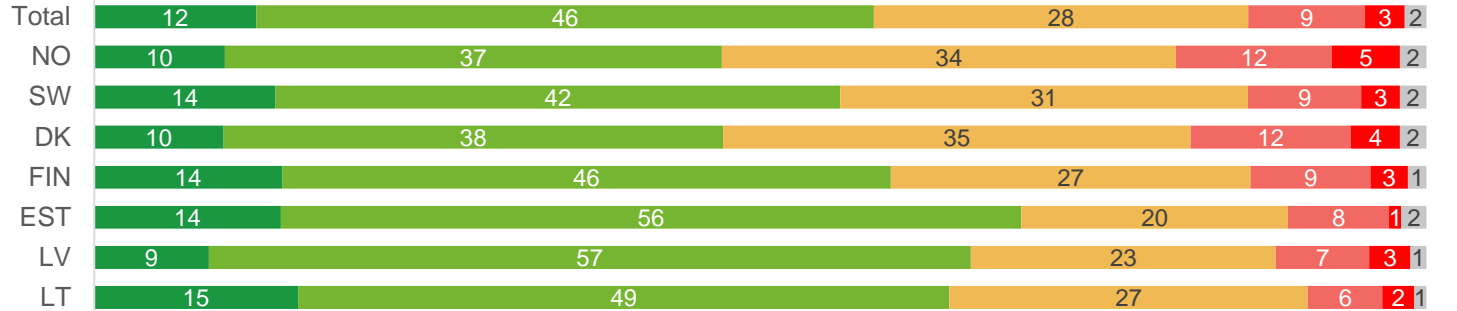
Base: All, N=7000 (1000 pr. country)

Q1.2 To what extent do you agree or disagree to these statements?

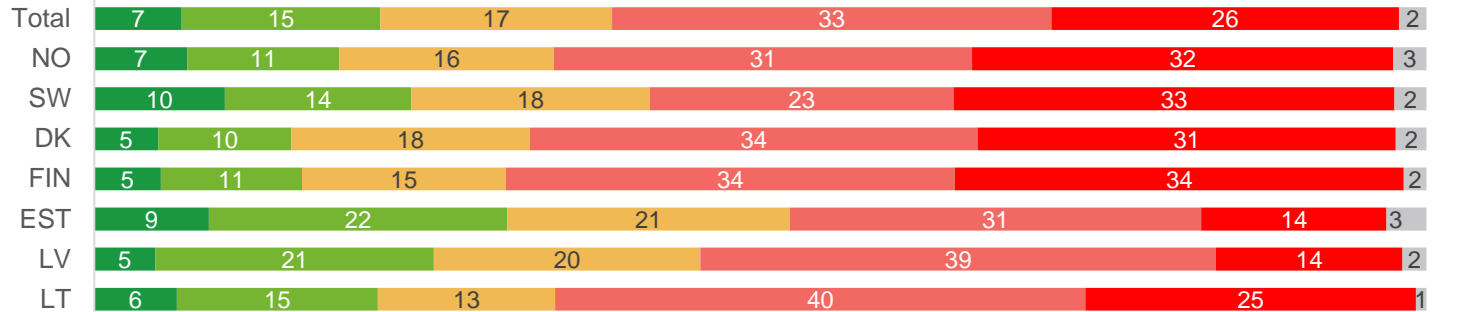
- A majority of people state they care about which company is making the products they buy.
- 22 % agree with the statement that they do not think the world is facing a major climate crisis. Men are slightly overrepresented, and diet-conscious people tend to disagree more than omnivores.
- 17 % are not willing to make more climate-friendly choices in everyday life. 23 % of men disagrees with the statement compared to 14 % of women.

Country breakdown

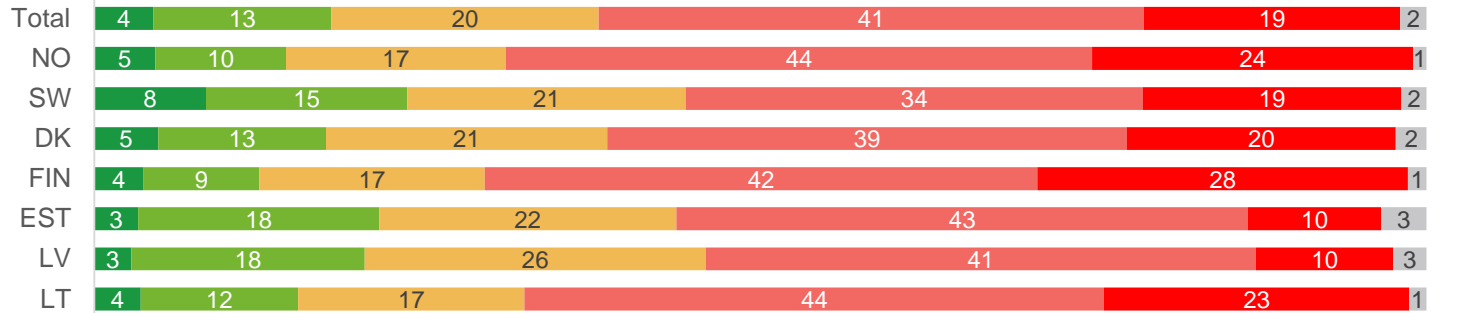
I care about which company is making the products I buy



I don't think the world faces a major climate crisis



I am not willing to make more climate-friendly choices in everyday life

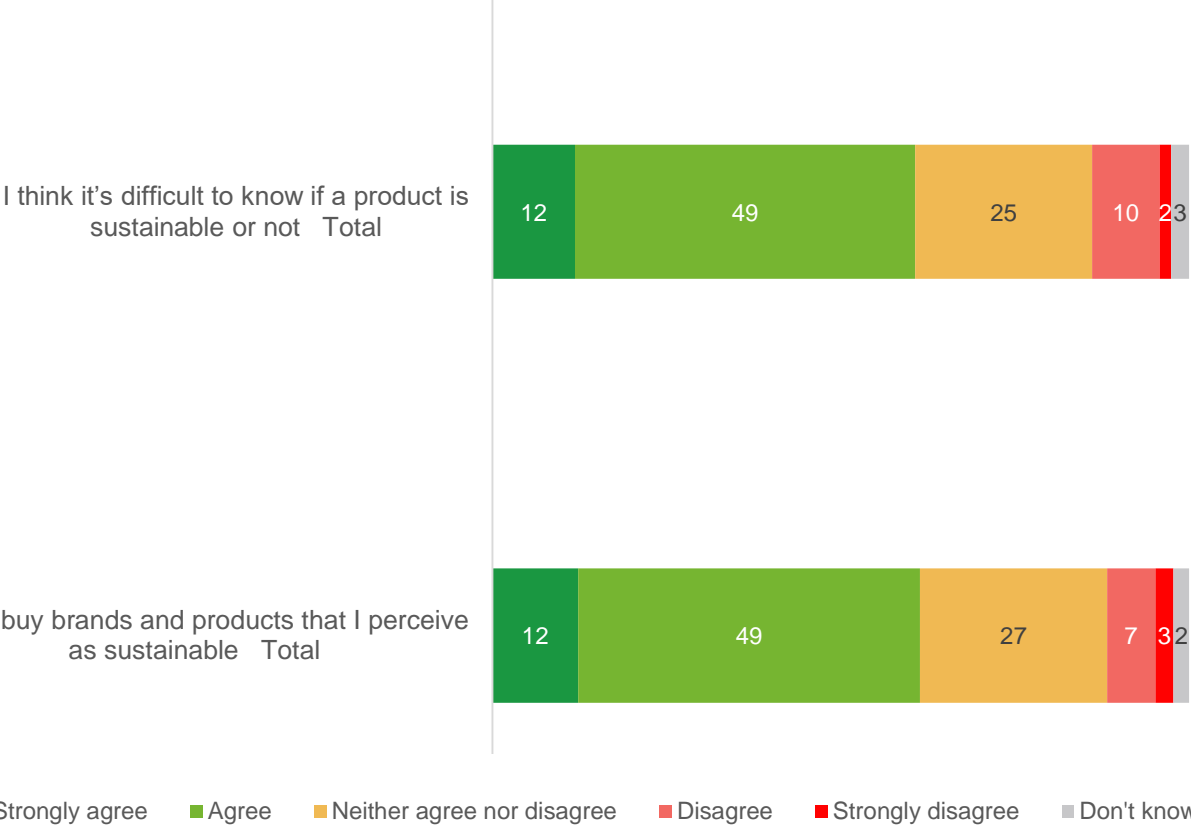


Base: All, N=7000 (1000 pr. country)

Q1.2 To what extent do you agree or disagree to these statements?

■ Strongly agree
 ■ Agree
 ■ Neither agree nor disagree
 ■ Disagree
 ■ Strongly disagree
 ■ Don't know

Consumers try to buy sustainable products, but find it hard to know if a product is sustainable or not

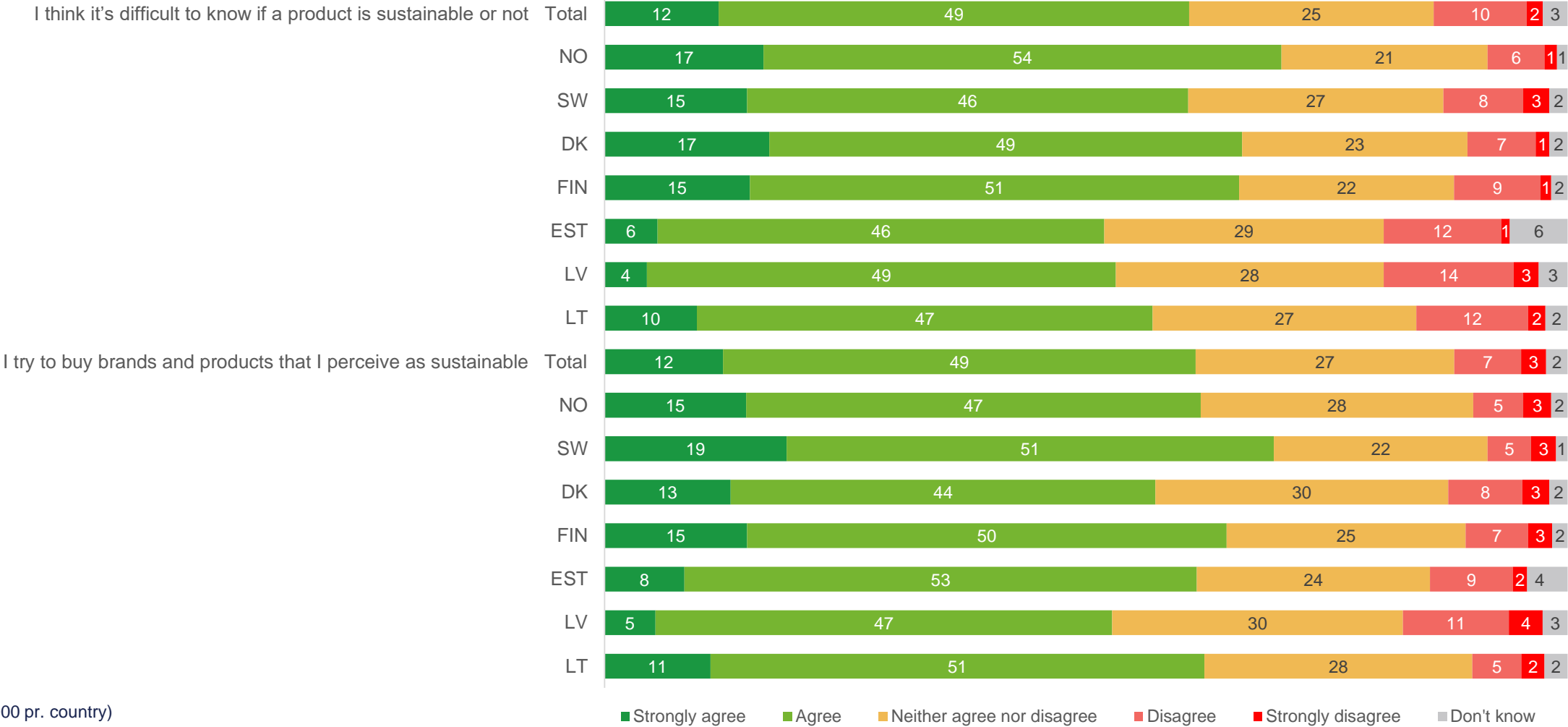


- More than 6 out of 10 find it difficult to know if a product is sustainable or not.
- The share of people agreeing with the statement increases with age. 56 % of people between 18 and 29 years agrees or strongly agrees compared to 80 % of people of 68 years or older.
- More than 1 out of 6 agrees with the statement that they try to buy products that they perceive are more sustainable. Only 1 out of 10 either disagrees or strongly disagrees.

Base: All, N=7000 (1000 pr. country)
 Q1.2 To what extent do you agree or disagree to these statements?



Country breakdown



Base: All, N=7000 (1000 pr. country)
 Q1.2 To what extent do you agree or disagree to these statements?

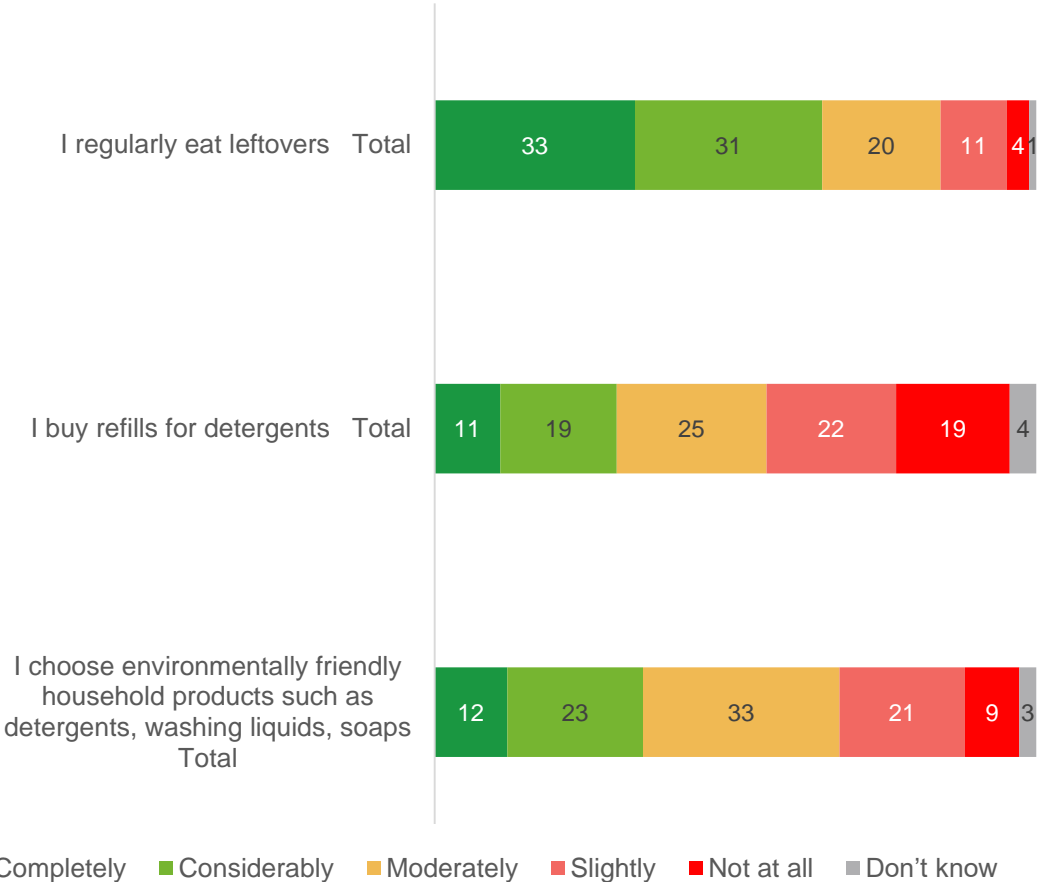


EVERYDAY LIFE SUSTAINABILITY

3



6 of 10 consumers states that they regularly eat leftovers

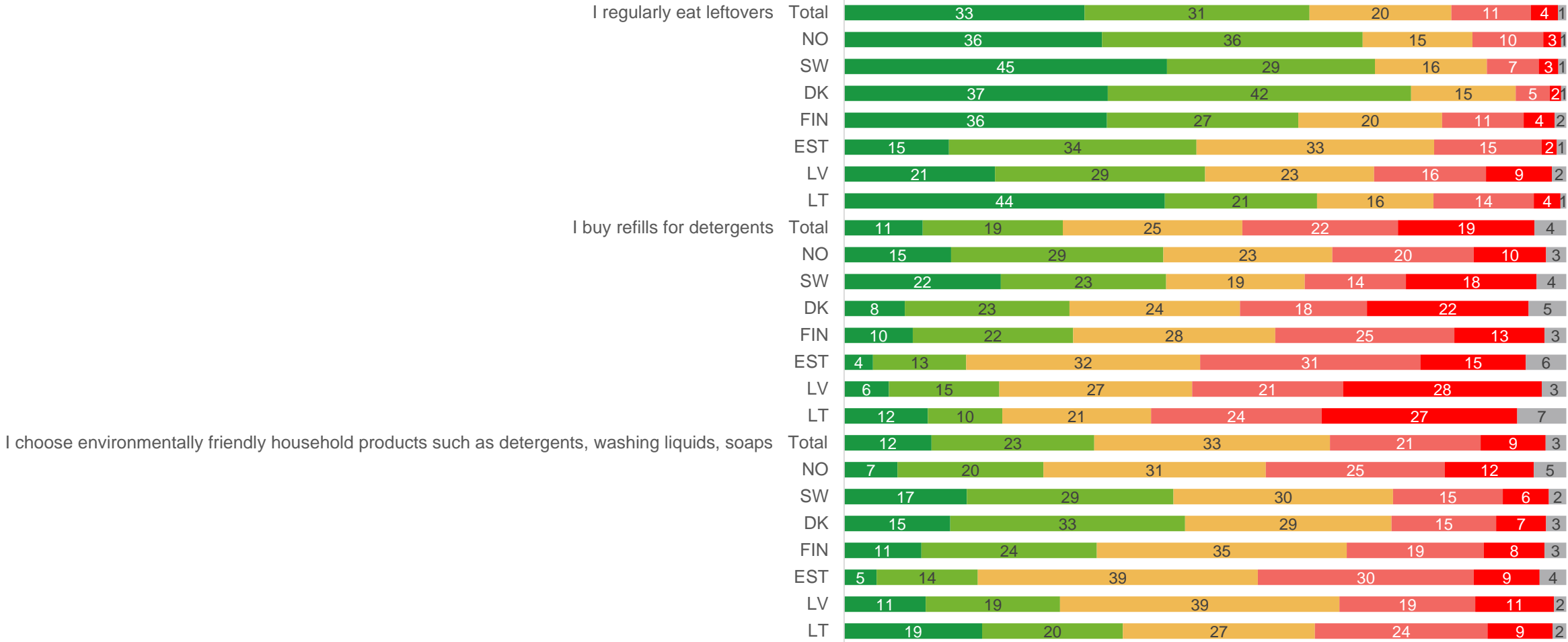


- More than half answers that they regularly eat leftovers. There are no differences between sub-groups.
- 3 out of 10 state they buy refills for detergents, while more than 4 out of 10 says the statement does not reflect their behavior or only slightly.
- More than 3 out of 10 say they choose environmentally friendly household products. The same share of people say they do not at all or feel that the statement slightly reflects their behavior.
- Diet conscious people tend to chose environmentally friendly household products more than omnivores.

Base: All, N=7000 (1000 pr. country)
 Q2.3 To what extent do you feel the statements below reflects your own behavior?



Country breakdown

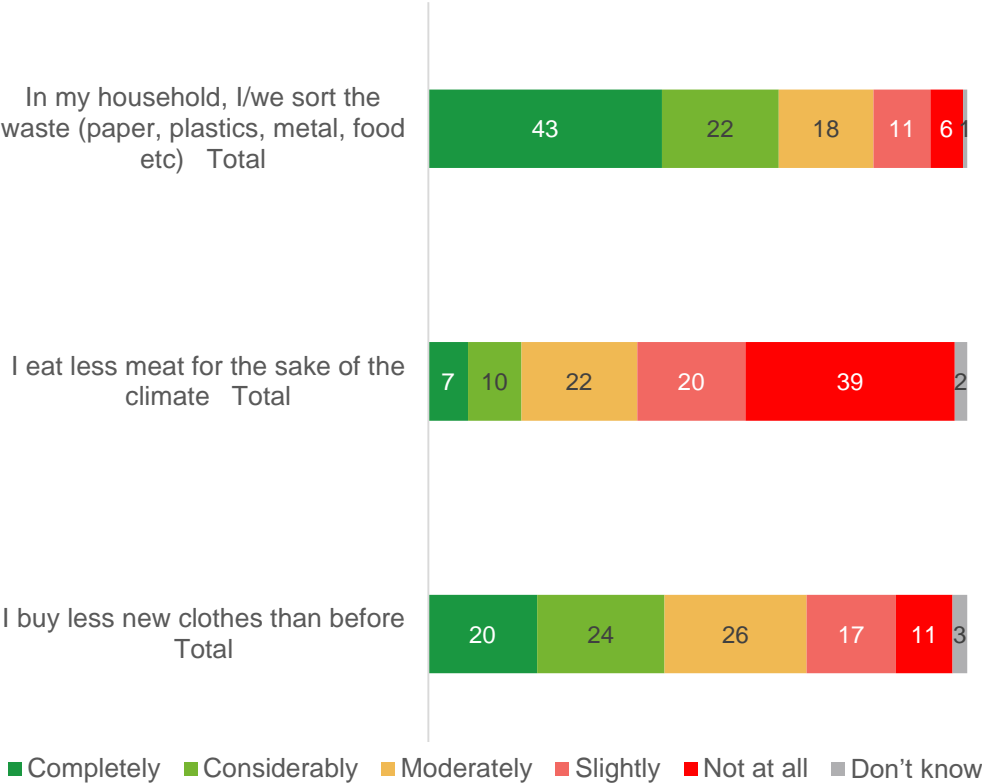


Base: All, N=7000 (1000 pr. country)
 Q2.3 To what extent do you feel the statements below reflects your own behavior?

■ Completely
 ■ Considerably
 ■ Moderately
 ■ Slightly
 ■ Not at all
 ■ Don't know



A majority of consumers says they sort waste in their household – not that many reports that they are currently eating less meat for the sake of the climate



- In general, a majority of people says they sort waste in their household. 18 % agrees moderately.
- People feels to a lesser degree that they are currently eating less meat for the sake of the climate. The data only shows small differences in sub-groups.
- 44 % states they feel that they completely or considerably are buying less clothes than before. Here, women are overrepresented with 49 % compared to 38 % of men.

Base: All, N=7000 (1000 pr. country)
 Q2.3 To what extent do you feel the statements below reflects your own behavior?

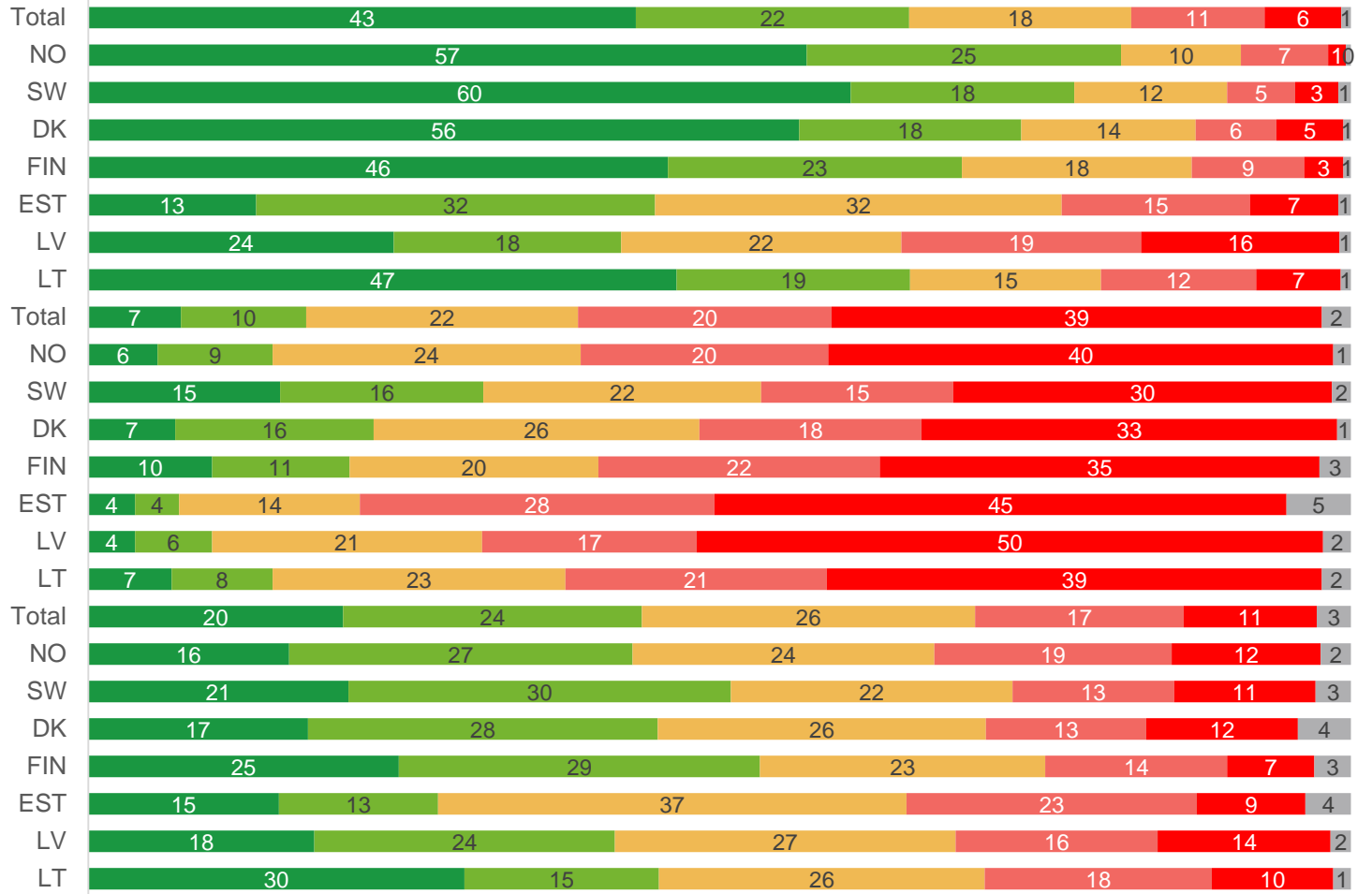


Country breakdown

In my household, I/we sort the waste (paper, plastics, metal, food etc)

I eat less meat for the sake of the climate

I buy less new clothes than before



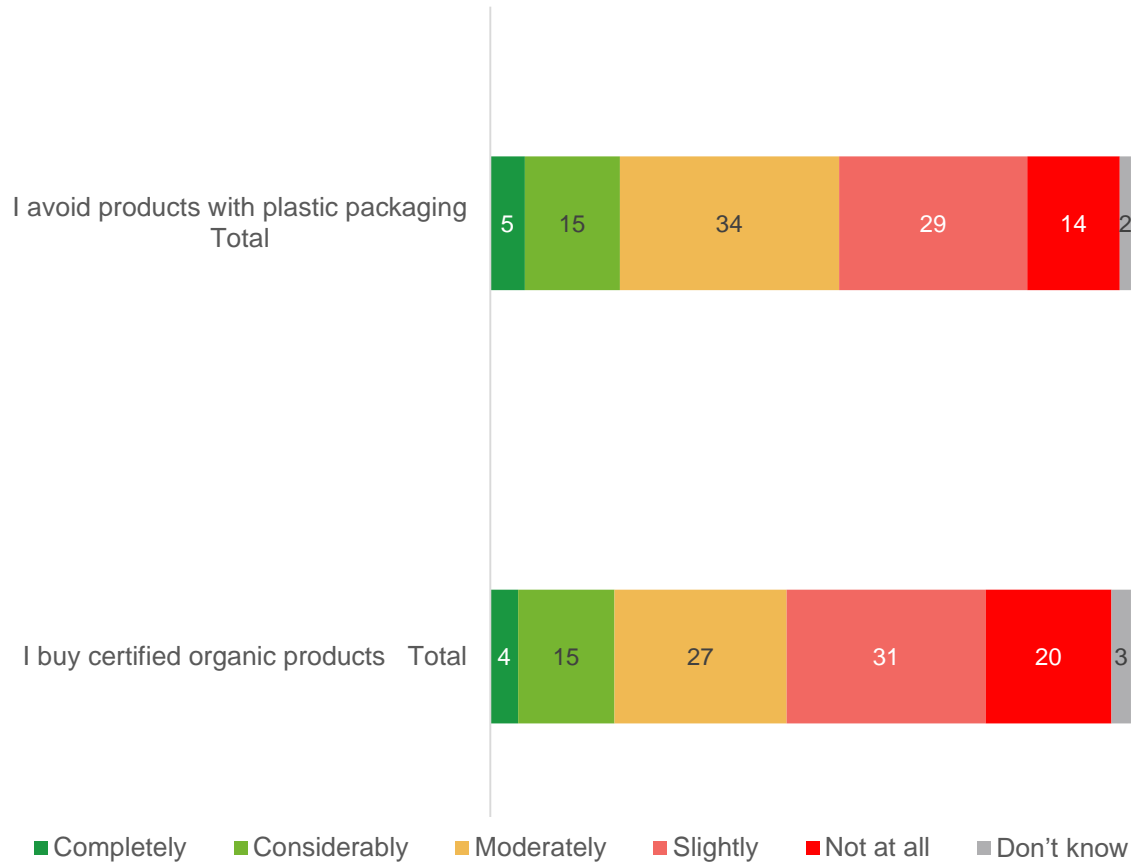
Base: All, N=7000 (1000 pr. country)

Q2.3 To what extent do you feel the statements below reflects your own behavior?

■ Completely
 ■ Considerably
 ■ Moderately
 ■ Slightly
 ■ Not at all
 ■ Don't know



1 of 10 consumers are consciously avoiding products with plastic packaging

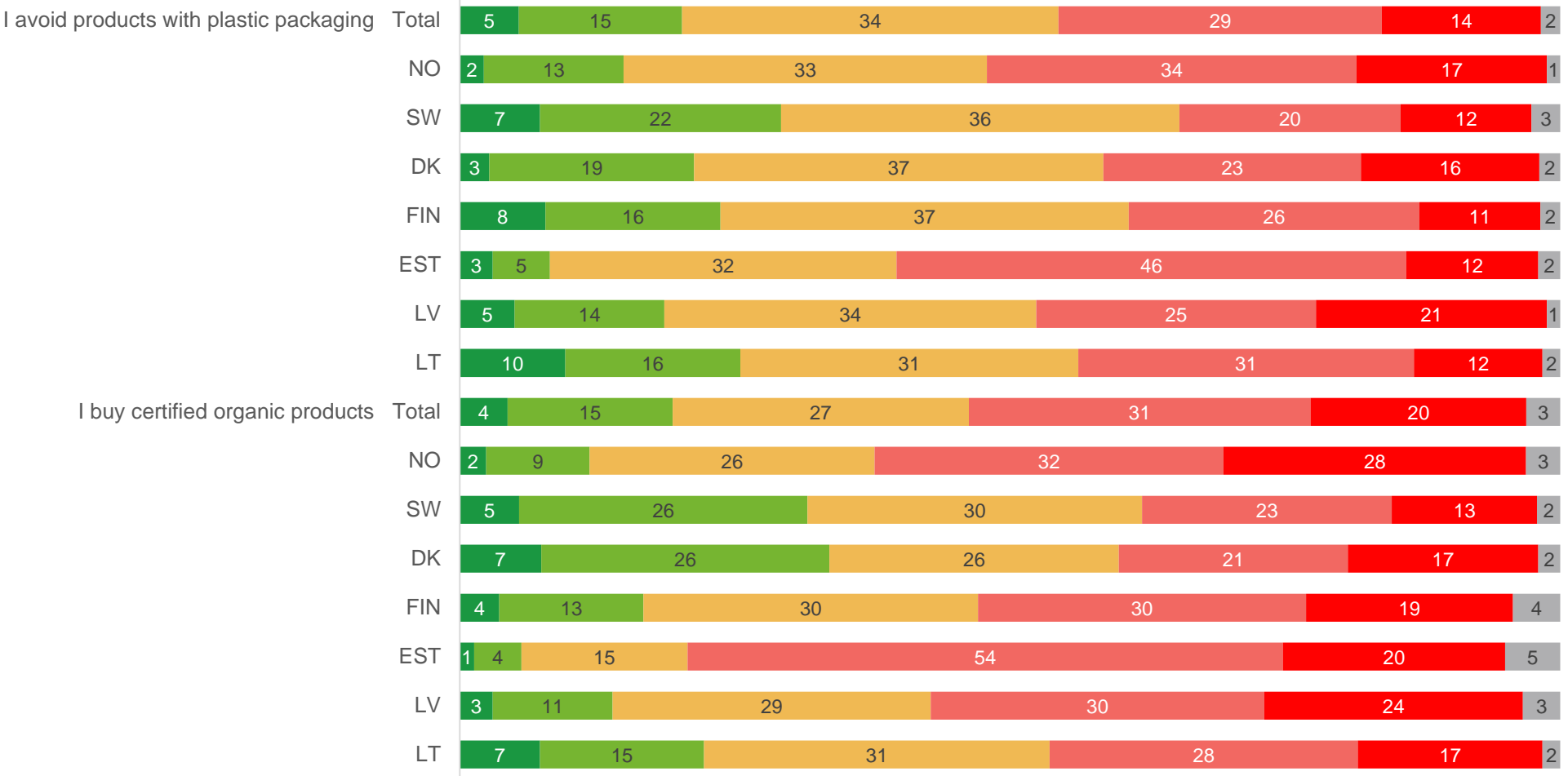


- 2 out of 10 say they completely or considerably feel they avoid plastic packaging.
- 43 % answers that they do not avoid plastic packaging at all or only to a lesser degree.
- More than half say they do not at all or only slightly agree that with the statement that they buy certified organic products. Less than 2 out of 10 say they completely or considerably feel the statement reflects their behavior.

Base: All, N=7000 (1000 pr. country)

Q2.3 To what extent do you feel the statements below reflects your own behavior?

Country breakdown



Base: All, N=7000 (1000 pr. country)
 Q2.3 To what extent do you feel the statements below reflects your own behavior?

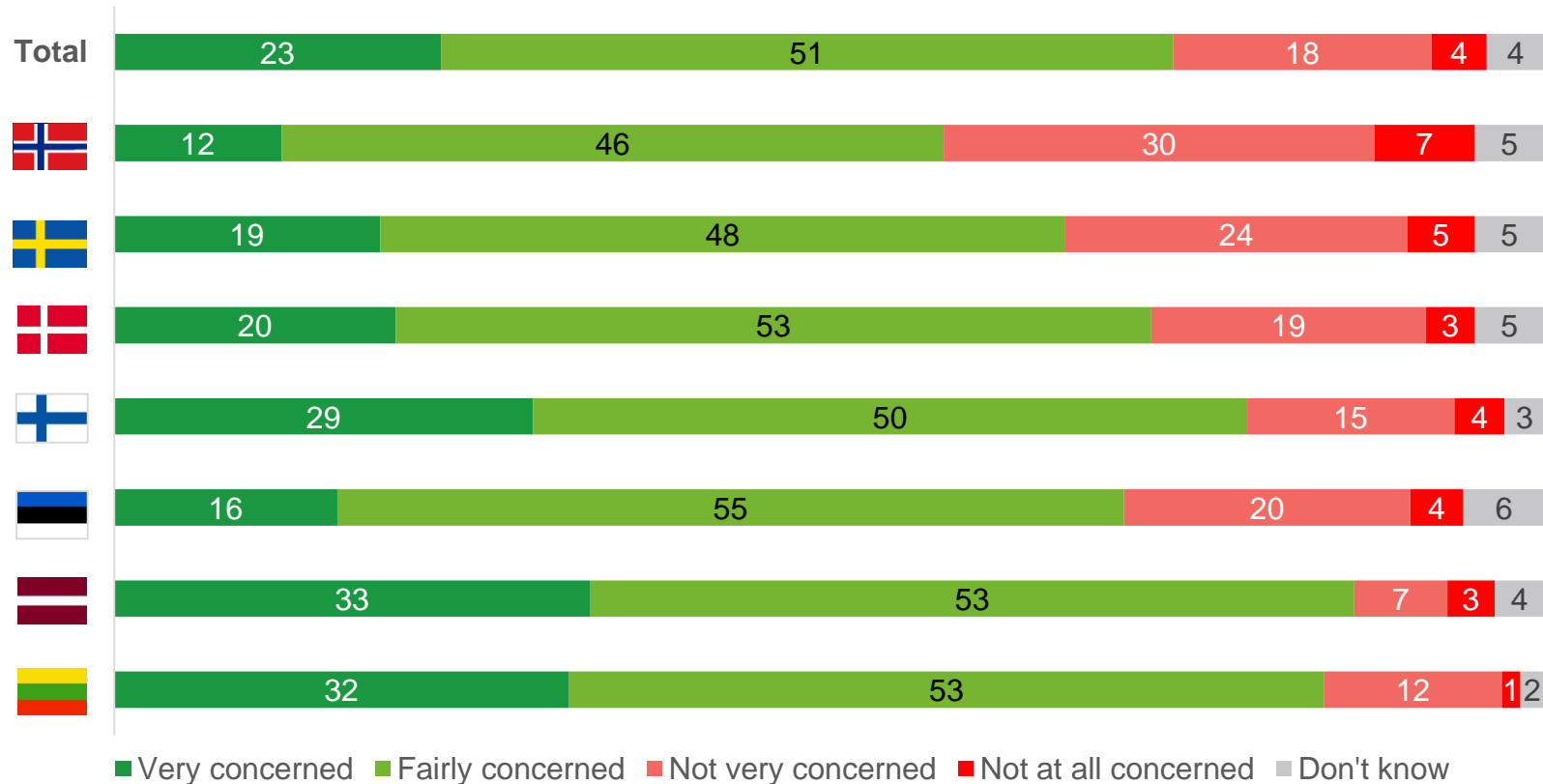
■ Completely
 ■ Considerably
 ■ Moderately
 ■ Slightly
 ■ Not at all
 ■ Don't know



PACKAGING

4

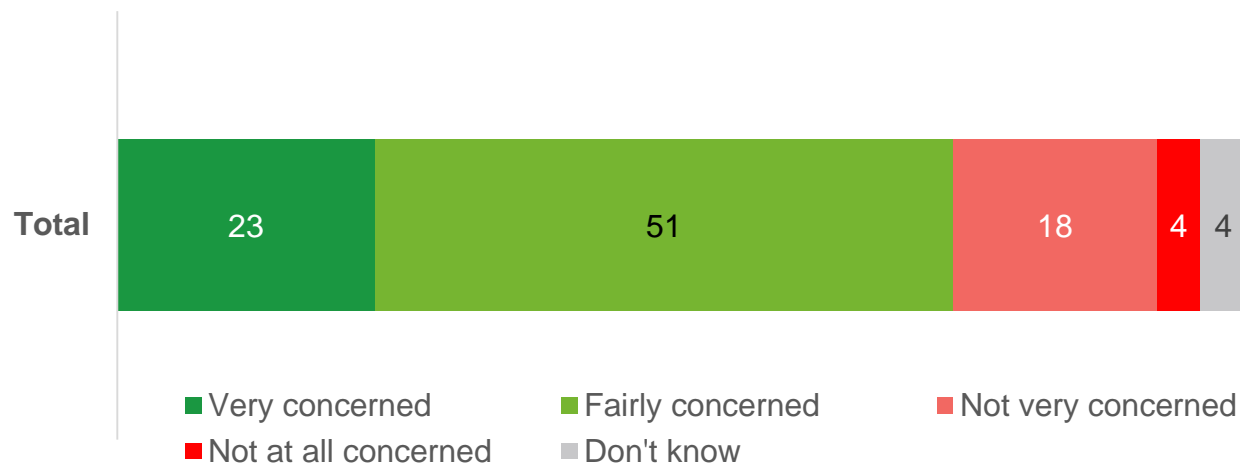
CONSUMERS ARE CONCERNED ABOUT THE ENVIRONMENTAL CONSEQUENCES OF PLASTIC PACKAGING



Base: All, N=7000 (1000 pr. country)

Q3.4 Recently, there have been discussions about the environmental consequences of plastic packaging not made from recycled materials or that is not recycled after use. How concerned, if at all, would you say you are about this topic?

CONSUMERS ARE CONCERNED ABOUT THE ENVIRONMENTAL CONSEQUENCES OF PLASTIC PACKAGING

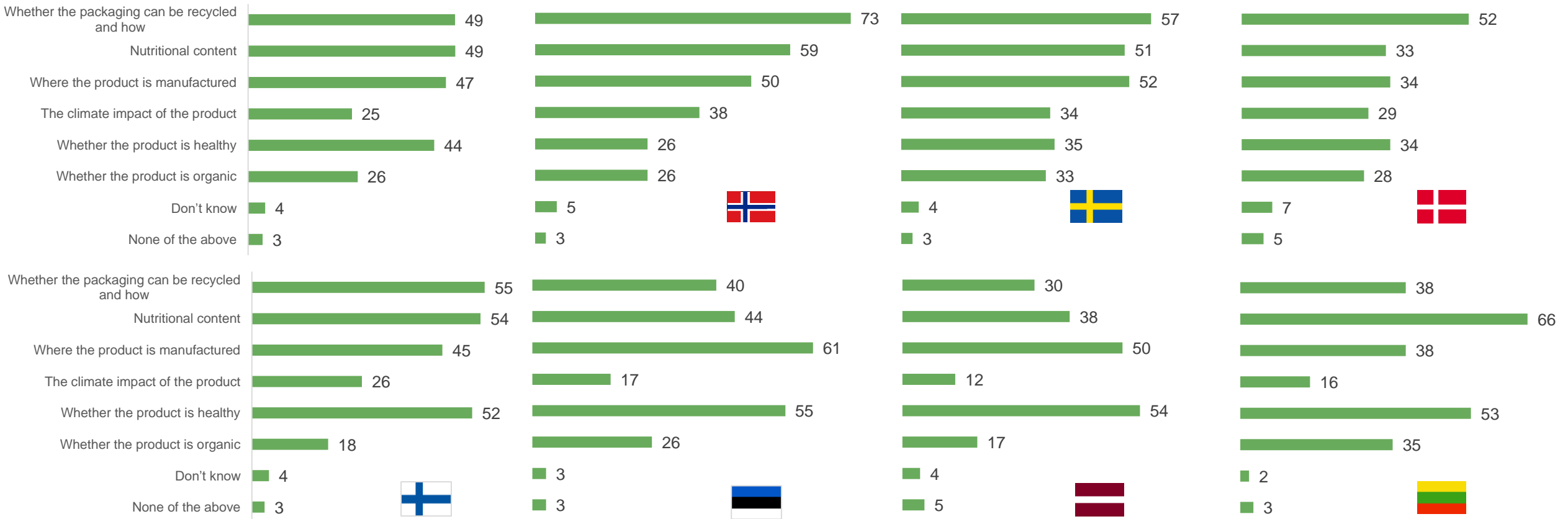


- Respondents in Finland, Latvia and Lithuania tend to be more concerned than average.
- The diet-conscious are more often "Very concerned" and omnivores more often "Fairly concerned", but there's no difference when adding the two alternatives together. In other words, both groups are "concerned" but to somewhat different degrees.
- Women are more concerned than men, with the share answering either "very" or "fairly concerned" being 79 % compared with 68 % of men.

Base: All, N=7000 (1000 pr. country)

Q3.4 Recently, there have been discussions about the environmental consequences of plastic packaging not made from recycled materials or that is not recycled after use. How concerned, if at all, would you say you are about this topic?

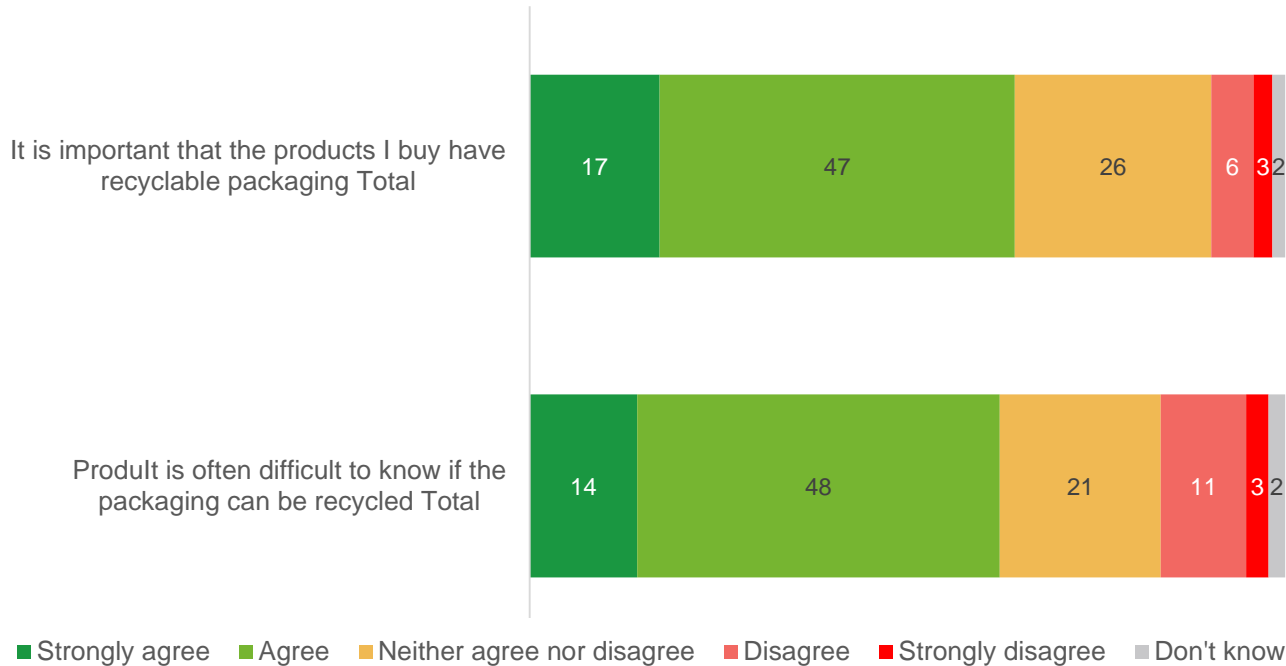
Recycling information on the packaging is important for the consumer



Base: All, N=7000 (1000 pr. country)

Q3.5 Which if any of the following information are important to you on product packaging?

6 of 10 consumer says its important that products they buy have recyclable packaging, but they find it hard to know whether the packaging is recyclable or not.



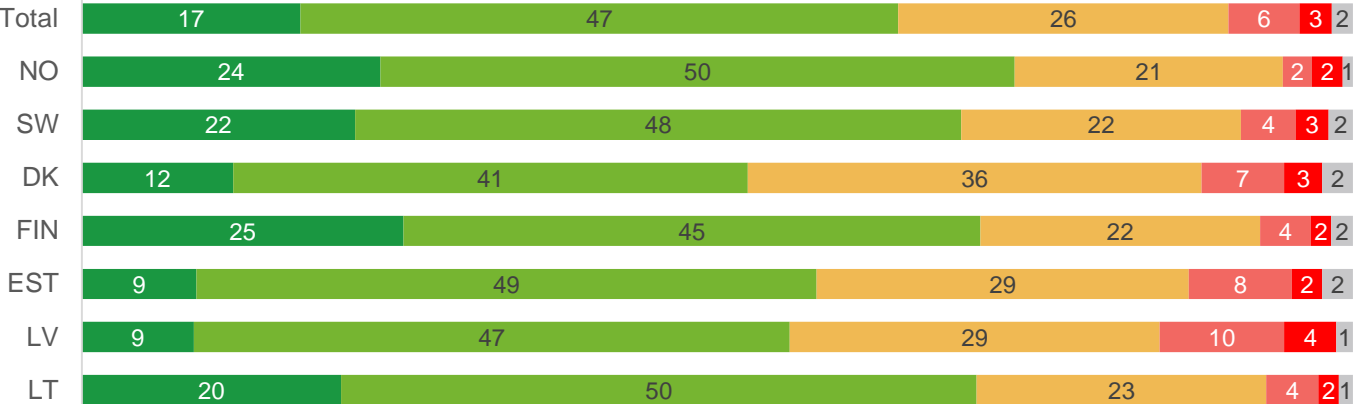
- There are high numbers of the respondents that agree with both the importance of recyclable packaging and difficulty to know whether packaging is recycled.
- Norway, Sweden and Finland agree most with the importance of buying products with recyclable packaging. Females also agree slightly above average (68 % vs. 60 % of males). Older respondents (55+ years) also agree more often than younger respondents (40- years).
- Regarding difficulty of knowing whether packaging is recyclable, no gender difference stands out, but the age difference is the same.

Base: All, N=7000 (1000 pr. country)

Q3.6 To what extent do you agree or disagree to the following statements?

Country breakdown

It is important that the products I buy have recyclable packaging



Product is often difficult to know if the packaging can be recycled

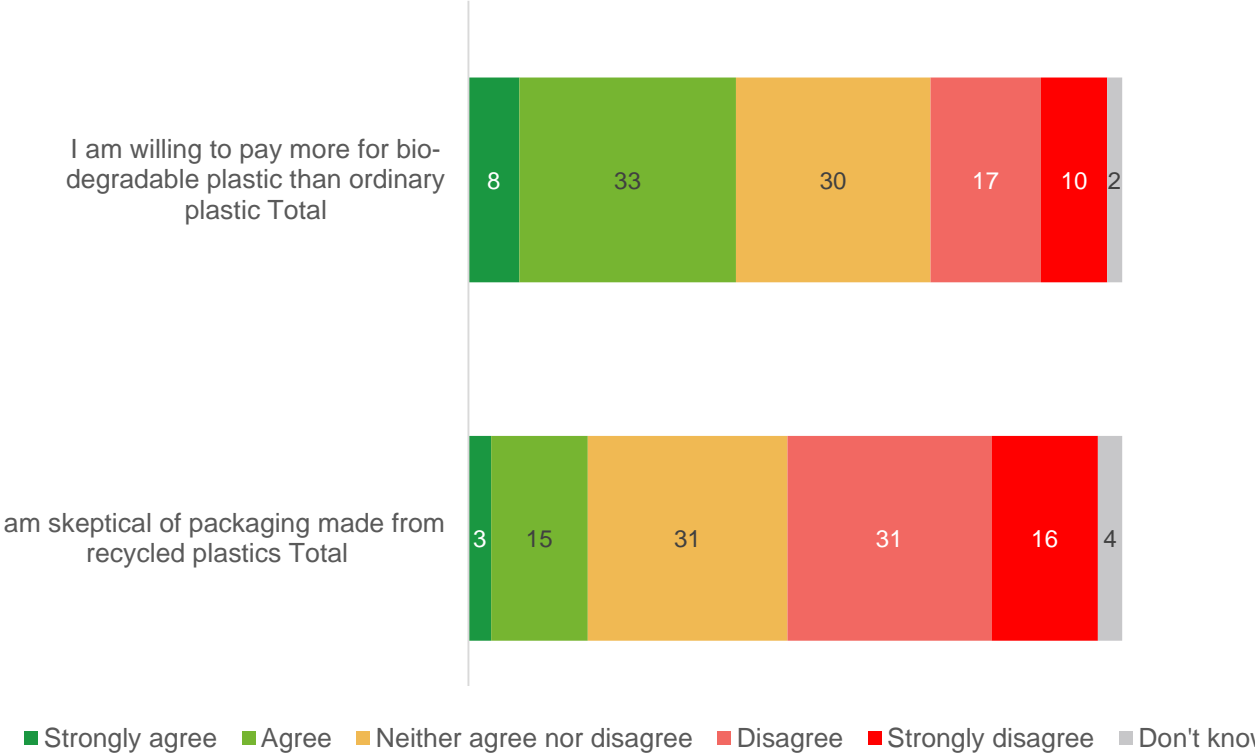


Legend: Strongly agree (dark green), Agree (light green), Neither agree nor disagree (yellow), Disagree (red), Strongly disagree (dark red), Don't know (grey)

Base: All, N=7000 (1000 pr. country)
 Q3.6 To what extent do you agree or disagree to the following statements?



4 out of 10 consumers are willing to pay more for bio-degradable plastic than ordinary plastic



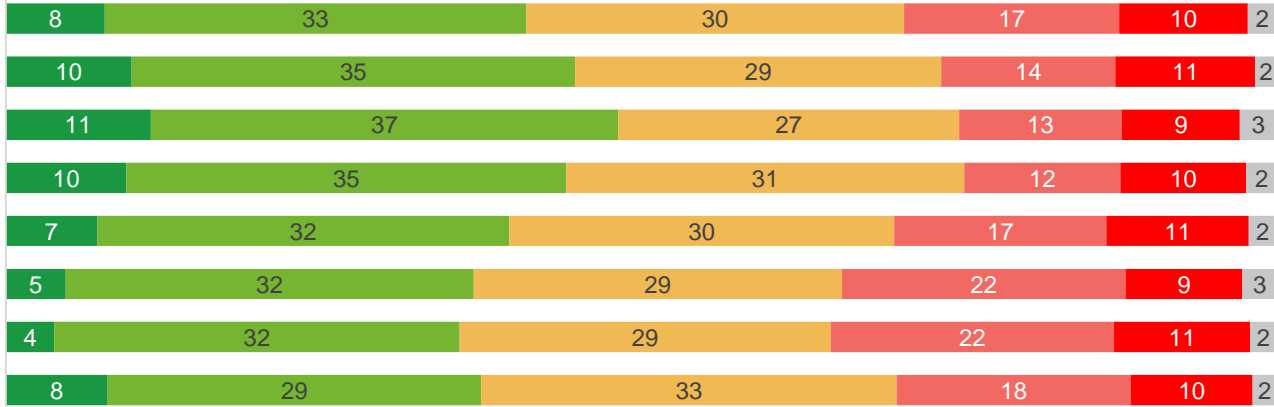
- A majority agrees or strongly agrees that they are willing to pay more for bio-degradable plastic than ordinary plastic.
- 3 out of 10 neither agrees nor disagrees.
- Less than 2 out of 10 agree or strongly agree that they are skeptical of packaging made from recycled plastics.

Base: All, N=7000 (1000 pr. country)
 Q3.6 To what extent do you agree or disagree to the following statements?

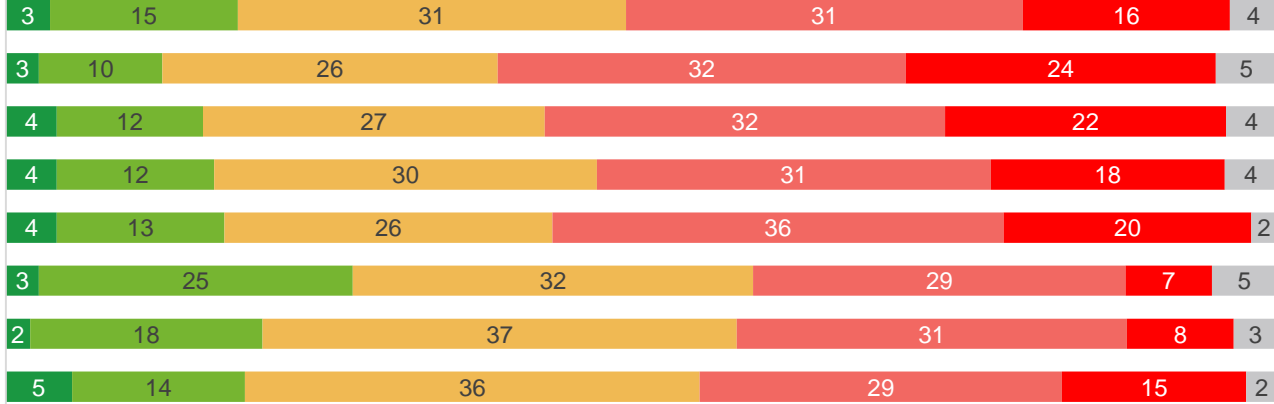


Country breakdown

I am willing to pay more for bio-degradable plastic than ordinary plastic



I am skeptical of packaging made from recycled plastics



Base: All, N=7000 (1000 pr. country)
 Q3.6 To what extent do you agree or disagree to the following statements?

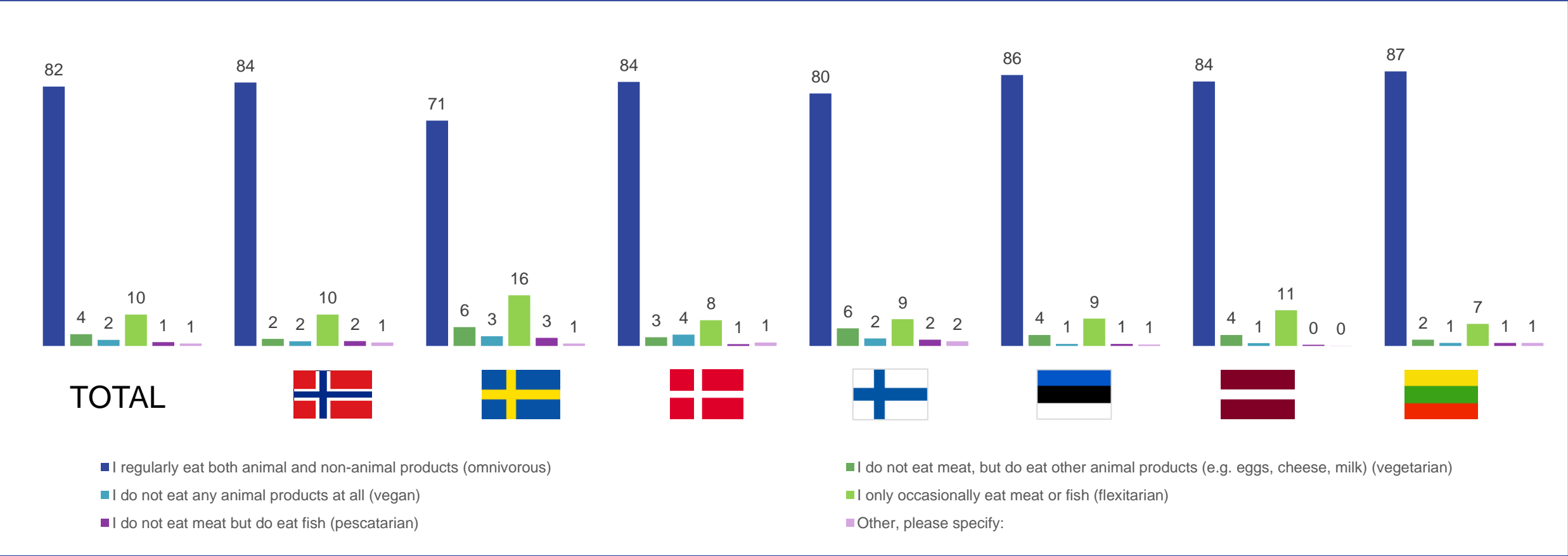
■ Strongly agree
 ■ Agree
 ■ Neither agree nor disagree
 ■ Disagree
 ■ Strongly disagree
 ■ Don't know



DIETARY HABITS

5

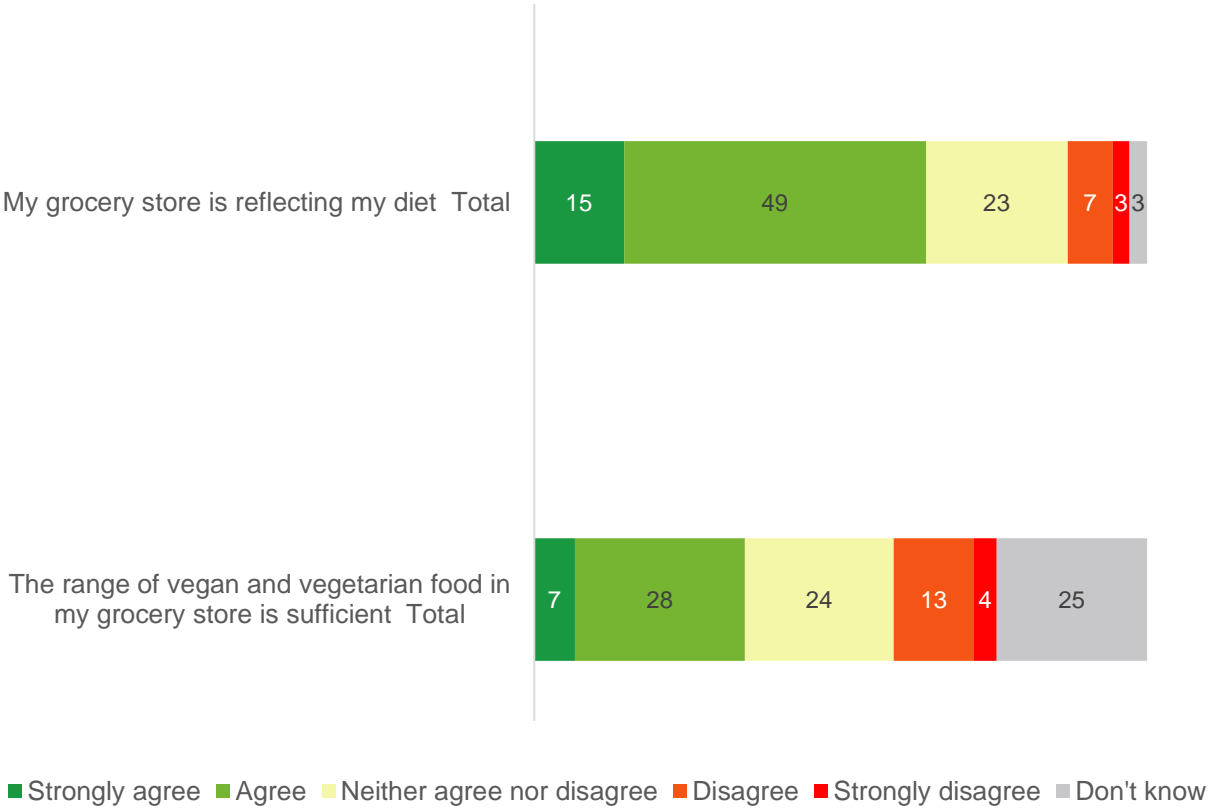
Consumers in this region are omnivorous!



Base: All, N=7000 (1000 pr. country)
 Q4.7 Which of the following statements is the best description of your current diet?



6 of 10 consumers states their grocery store reflects their diet

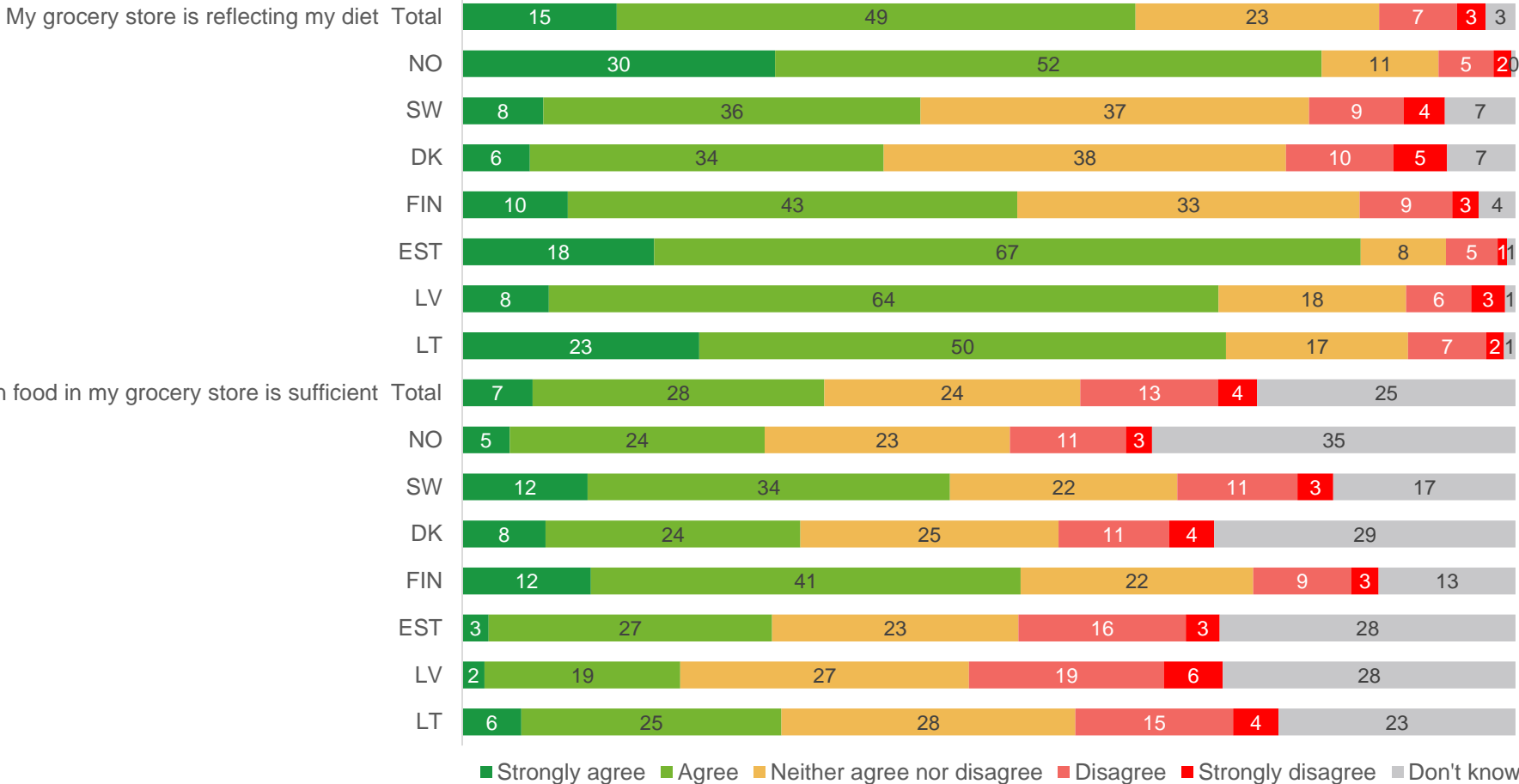


- Most people feel their grocery store reflects their diet, but the numbers are much more positive in Norway and the Baltics.
- Lower shares find their grocery store to offer a sufficient range of vegetarian/vegan products. Sweden and Finland find the product range to be more sufficient than other countries.
- The diet-conscious are divided on the last question, with high shares agreeing and disagreeing regarding the sufficiency of vegetarian/vegan products.

Base: All, N=7000 (1000 pr. country)
 Q4.8 To what extent do you agree or disagree with these statements?



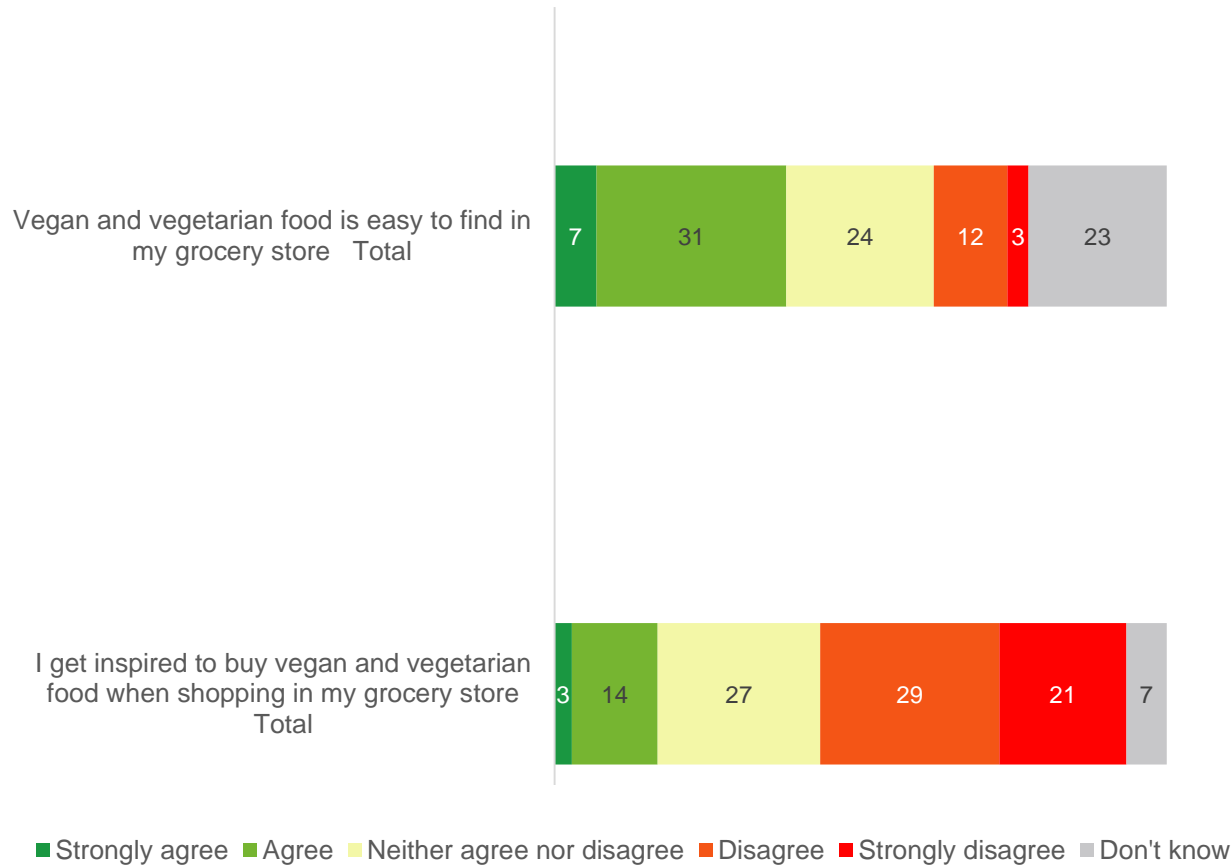
Country breakdown



Base: All, N=7000 (1000 pr. country)
 Q4.8 To what extent do you agree or disagree with these statements?



4 out of 10 consumers think it's easy to find vegetarian and vegan food in their grocery store



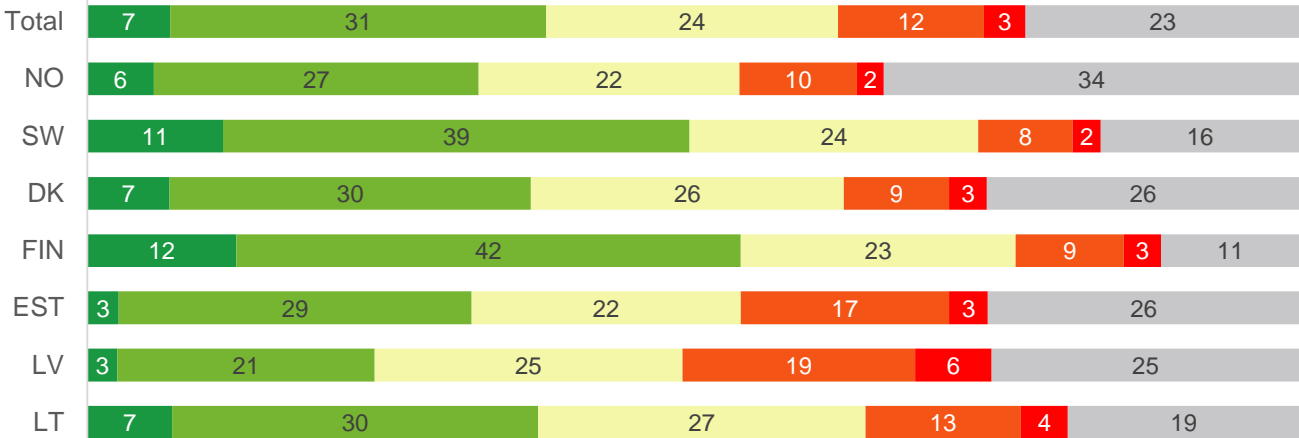
- About 4 out of 10 think it's easy to find vegetarian and vegan food, but the numbers are again higher in Sweden and Finland (5 out of 10).
- Few people overall feel inspired to buy more vegetarian/vegan when shopping in their grocery store. Once again, Finland (30 % agreeing) and Sweden (22 %) stand out.

Base: All, N=7000 (1000 pr. country)

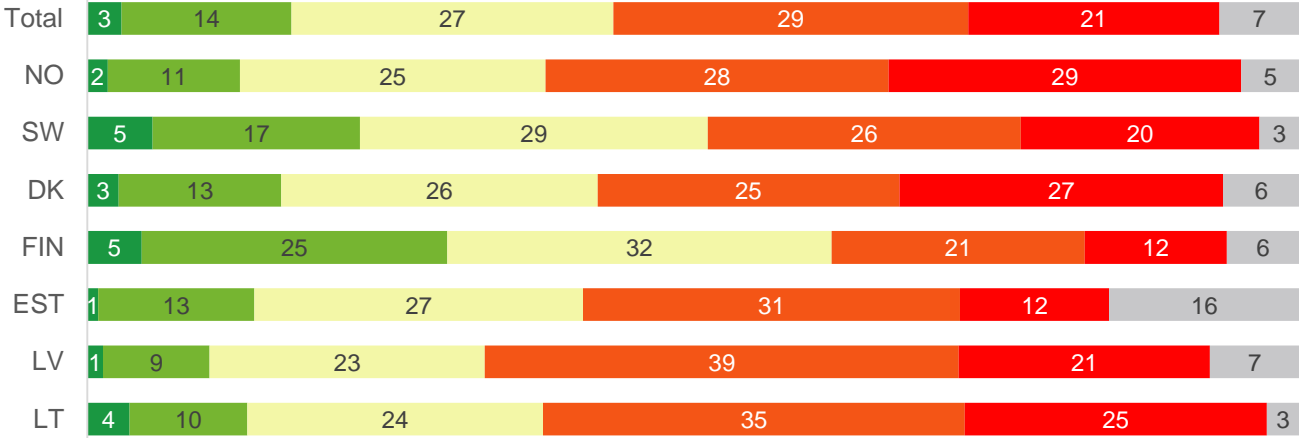
Q4.8 To what extent do you agree or disagree with these statements?

Country breakdown

Vegan and vegetarian food is easy to find in my grocery store



I get inspired to buy vegan and vegetarian food when shopping in my grocery store

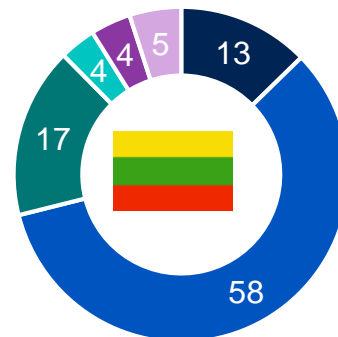
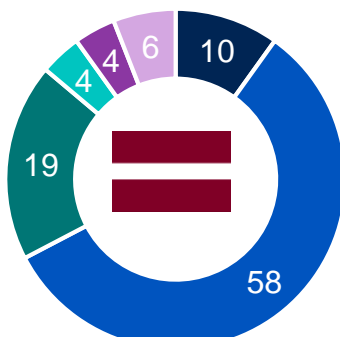
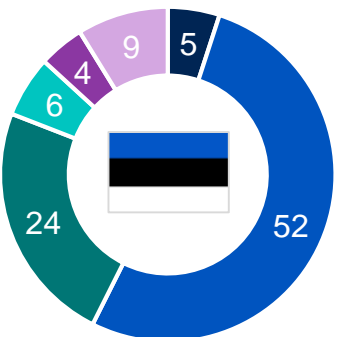
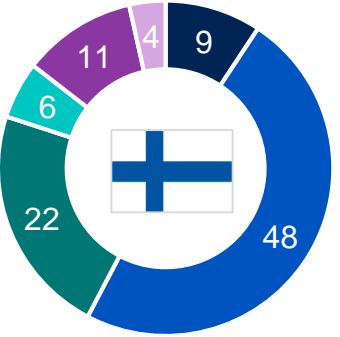
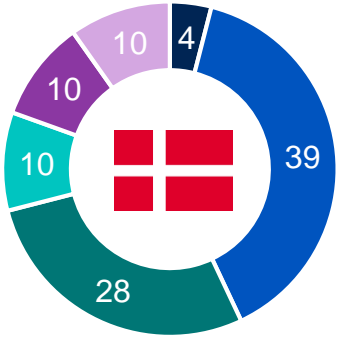
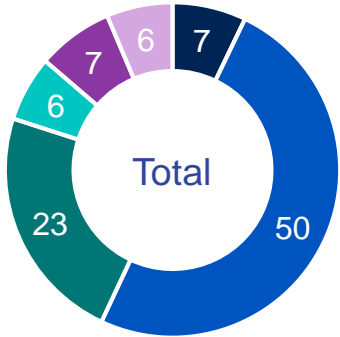


Legend: Strongly agree (dark green), Agree (medium green), Neither agree nor disagree (light green), Disagree (orange), Strongly disagree (red), Don't know (grey)

Base: All, N=7000 (1000 pr. country)
 Q4.8 To what extent do you agree or disagree with these statements?



6 og 10 consumers have dinner without meat or fish once a week or more often

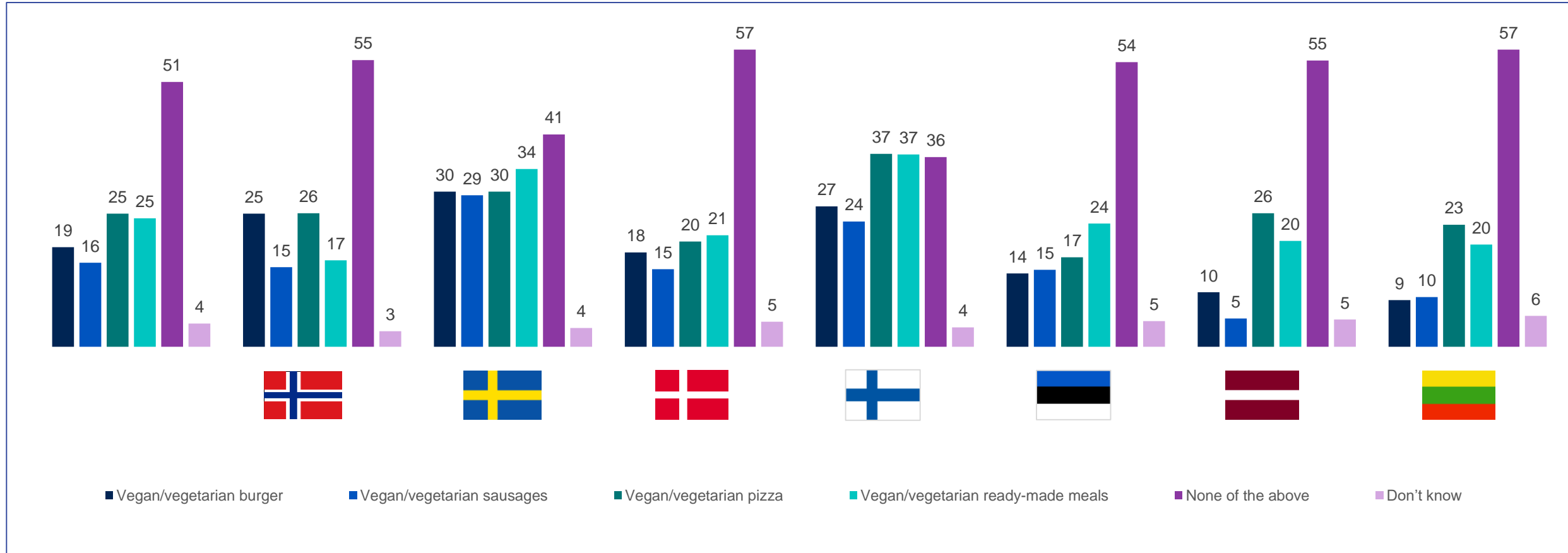


Base: All, N=7000 (1000 pr. country)
 Q4.9 How often do you have dinner without meat or fish?

■ Every day/daily
 ■ Weekly
 ■ Monthly
 ■ At least 1 time a year
 ■ Less often
 ■ Never



ABOUT HALF OF CONSUMERS HAVE TASTED SOME SORT OF READY-MADE VEGETARIAN/VEGAN PRODUCTS



Base: All, N=7000 (1000 pr. country)

Q4_10. Which of the following ready-made vegetarian/vegan products have you ever purchased/tasted?

46 % of the respondents have no desire to eat more vegetarian/vegan food

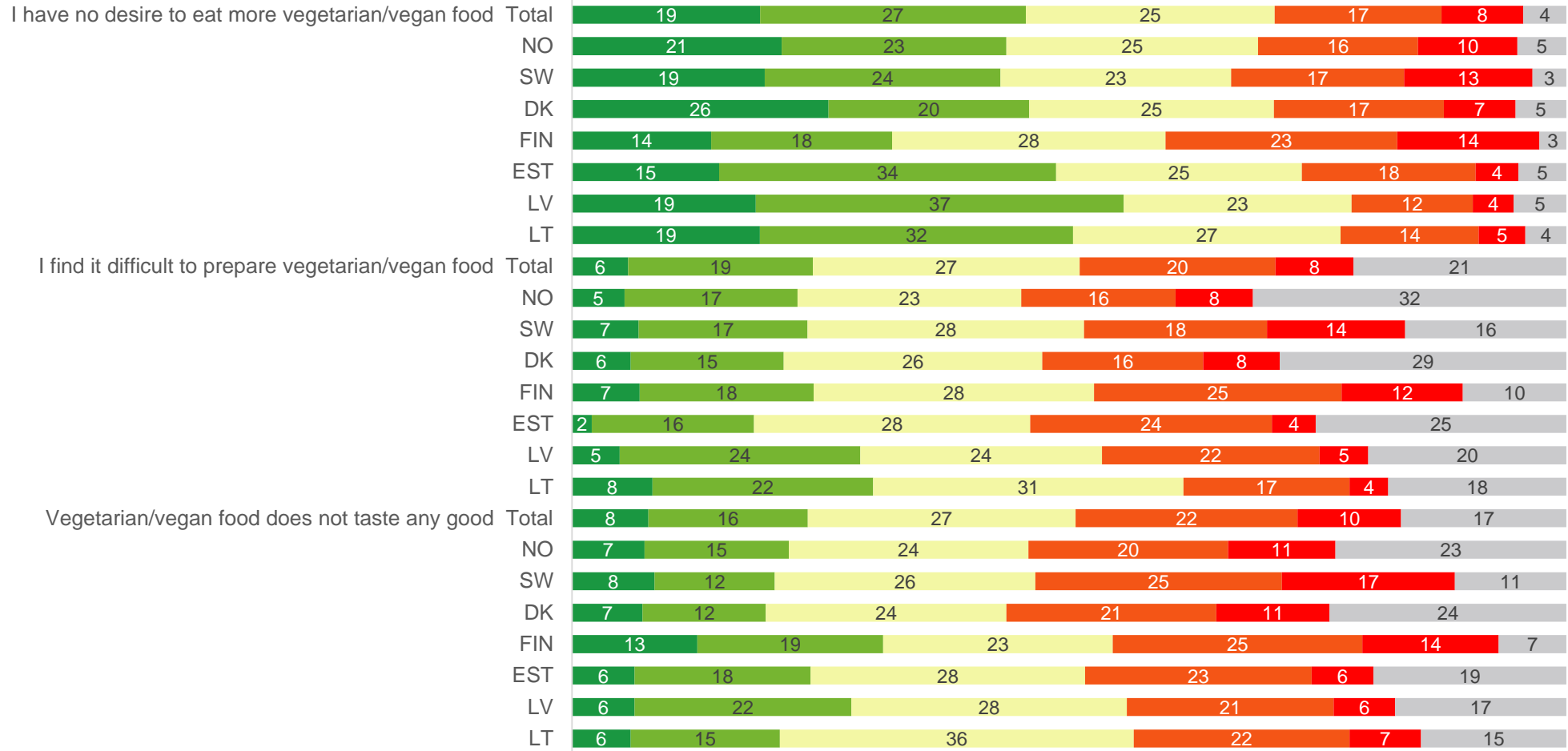


- 46 % of the respondents have no desire to eat more vegetarian/vegan food, but the numbers are higher in the Baltics than in the Nordics.
- Approximately 2 out of 10 don't know whether preparing vegetarian food is difficult or whether it tastes any good, indicating that these shares care less about vegetarian options than others. The highest shares of *don't know* is found in Norway, Denmark and Estonia.

Base: All, N=7000 (1000 pr. country)
 Q4.11 To what extent do you agree or disagree with these statements?



Country breakdown

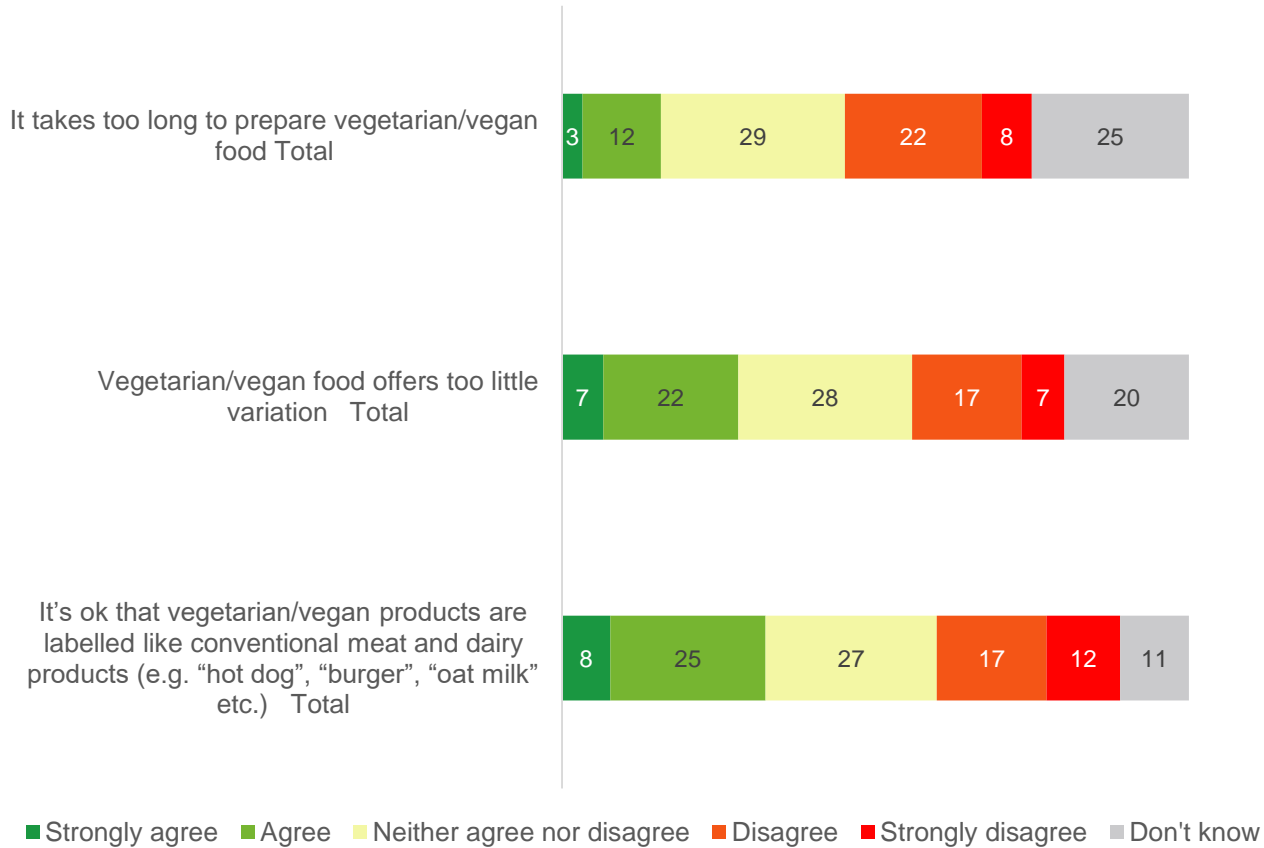


Base: All, N=7000 (1000 pr. country)

Q4.11 To what extent do you agree or disagree with these statements?

■ Strongly agree
 ■ Agree
 ■ Neither agree nor disagree
 ■ Disagree
 ■ Strongly disagree
 ■ Don't know

When it comes to preparation of vegetarian/vegan food there seems to be a lack of knowledge and inspiration

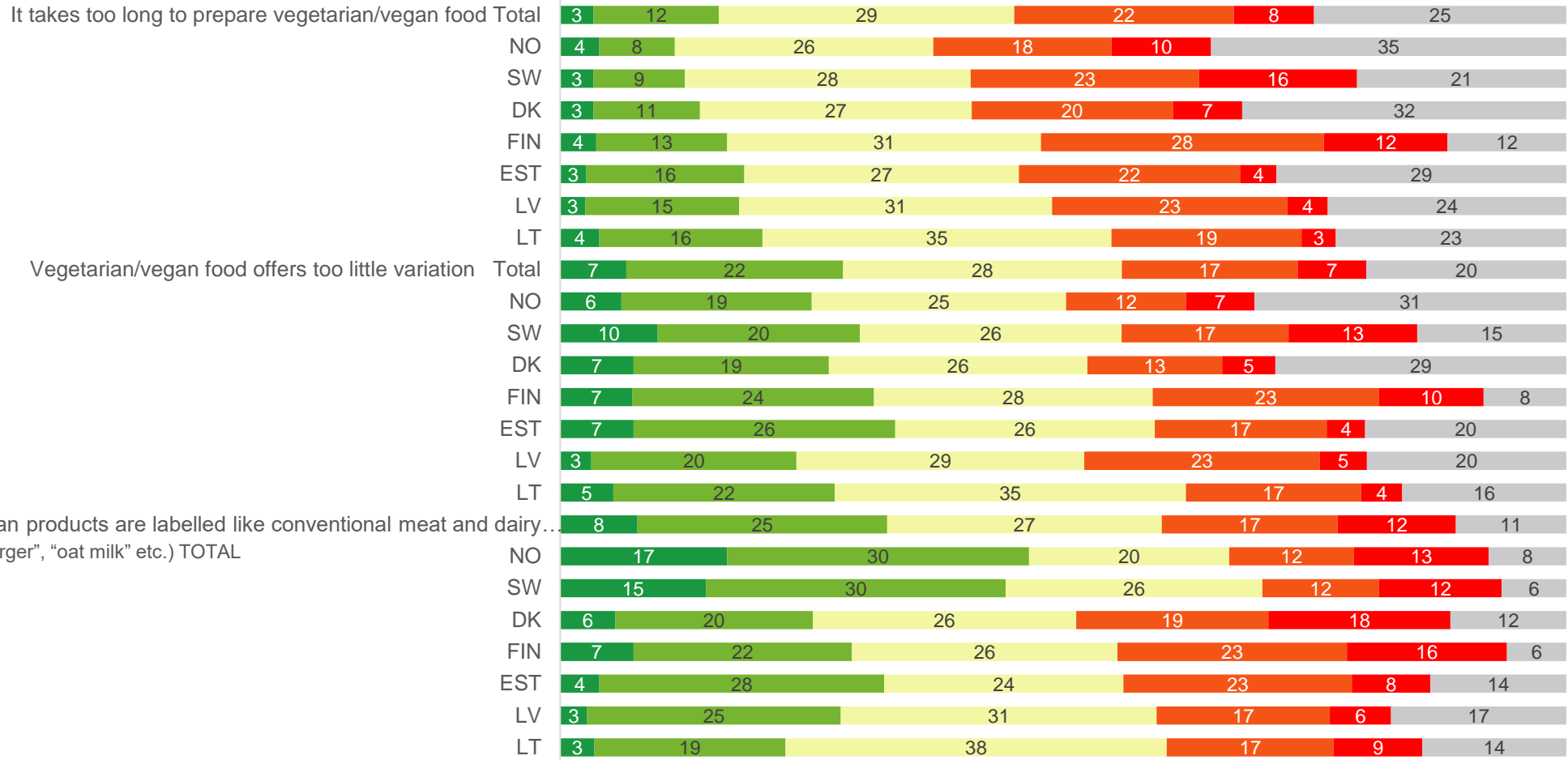


- The same pattern of people answering *don't know* repeats for questions regarding prep time and variation, with the same countries being overrepresented (Norway, Denmark and Estonia).
- Danes and Finns are especially skeptical to the idea of labeling vegetarian/vegan products like conventional meat and dairy products. Norwegians are most positive. The Baltics dominate the *don't know*-category on this question.

Base: All, N=7000 (1000 pr. country)

Q4.11 To what extent do you agree or disagree with these statements?

Country breakdown



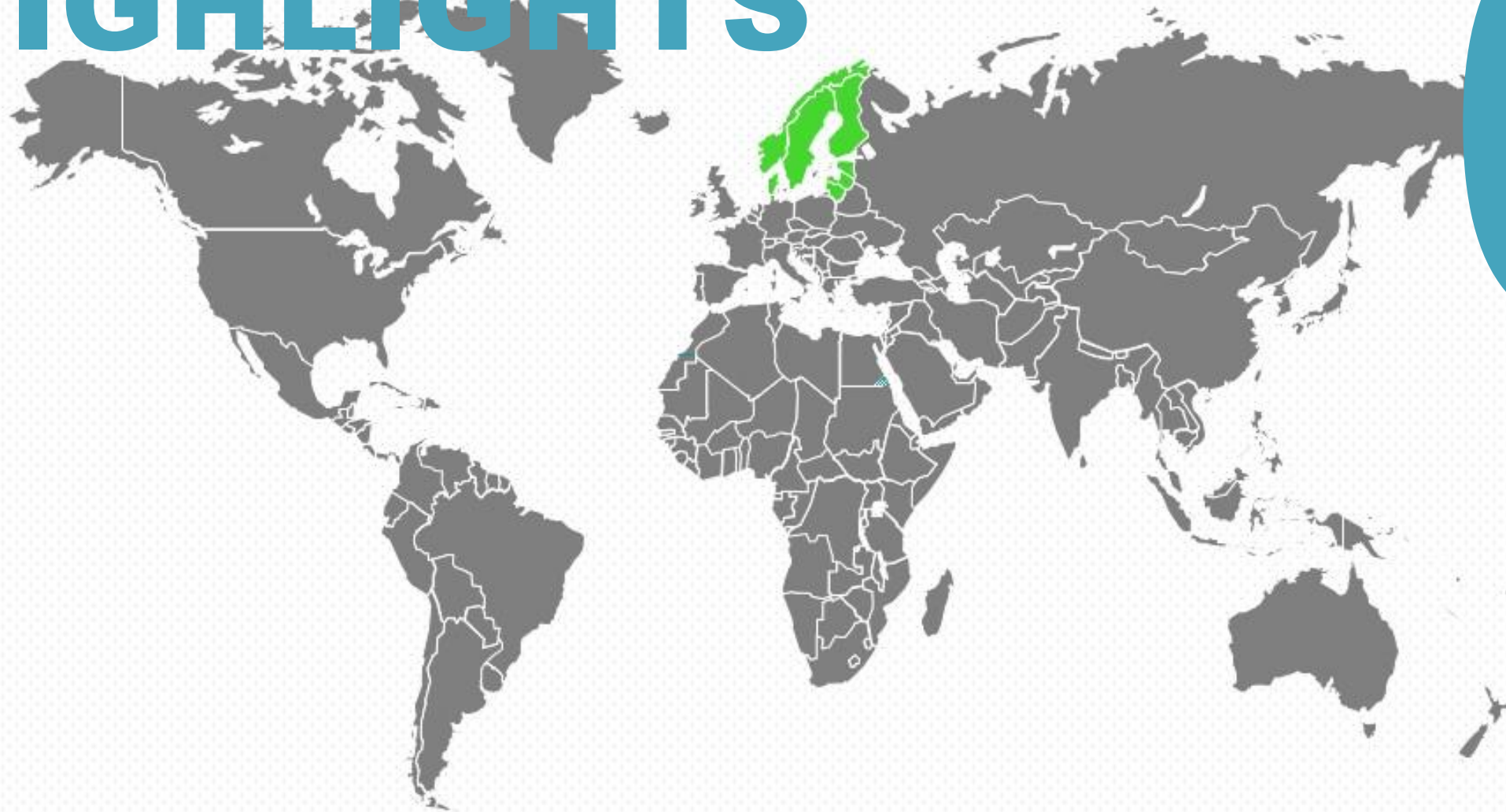
Base: All, N=7000 (1000 pr. country)

Q4.11 To what extent do you agree or disagree with these statements?

■ Strongly agree
 ■ Agree
 ■ Neither agree nor disagree
 ■ Disagree
 ■ Strongly disagree
 ■ Don't know

COUNTRY HIGHLIGHTS

6





NORWAY

GAME CHANGERS



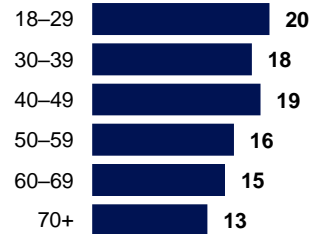
Norway



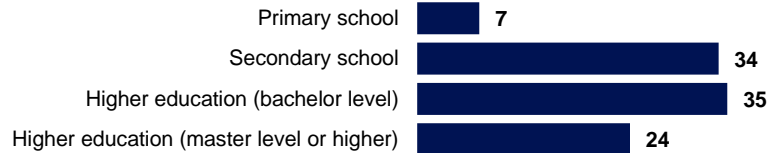
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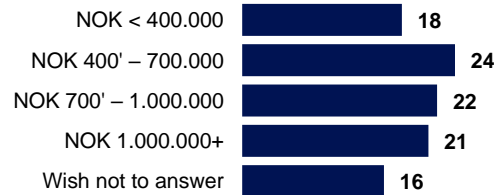
Age



Highest level of education



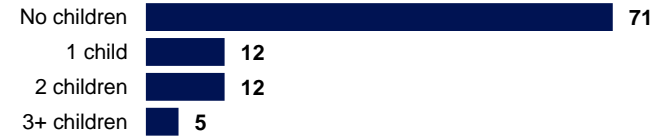
Household income



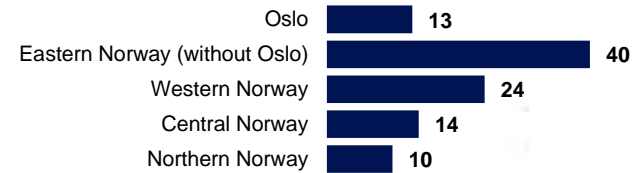
Marital status



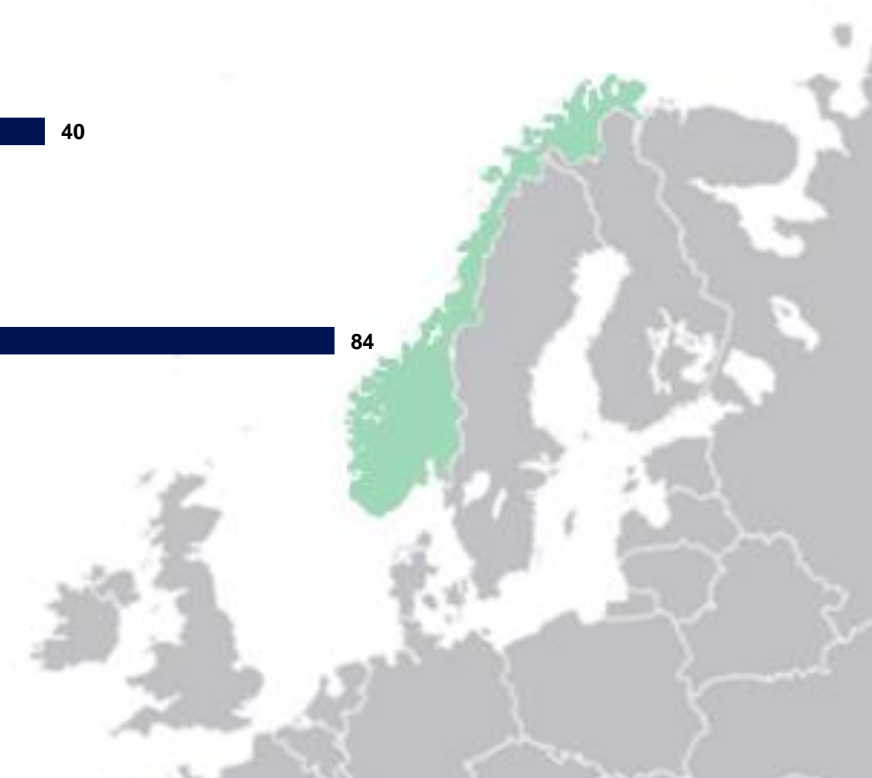
Children living in household



Region



Diet





SUMMARY – NORWAY

Environmental concern

ENVIRONMENTAL CONCERNED ON AVERAGE

The environmental concern of Norwegians is on average within the Nordic region. They score high on some measures and low on others.

They have a far lower stated preference for organic foods and are less concerned about the environmental consequences of plastic packaging, but rank highest in sorting waste and their stated importance of buying products with recyclable plastic packaging.

MOST IMPORTANT ISSUES

60 % of Norwegians perceive *climate change* and *climate emissions* to be the single most important environmental issue.

In a close second is *plastics and microplastics in the ocean*, mentioned by 58 % as one of the top three most important issue.

Norwegians are slightly more concerned about *future food sources and supplies* (21 %) and *wildlife conservation* (19 %) than their neighbors.

CONCERN ABOUT MAJOR CLIMATE CRISIS

The Norwegians' concern for a major climate crisis is on par with the other Nordic countries: 63 % of Norwegians reject that there is no major climate crisis facing the world.

1 out of 5 Norwegians are not concerned about a major climate crisis facing the world.

LOW SHARE OF VEGETARIANISM

Along with Denmark, Norway has the highest share of omnivores (eating both fish and meat) and the lowest share of vegetarians. 2 % of the Norwegian respondents label themselves as vegetarians, compared with an average of 4 % in the Nordic region. Sweden and Finland have the highest share of vegetarians, both with 6 %.

15 % of Norwegians make considerable effort to eat less meat for the sake of climate. This is a smaller number than the Nordic average (22 %). 40 % of Norwegians *do not at all* eat less meat for the sake of climate, also highest in the Nordic region.



SUMMARY – NORWAY

Recycling and plastic packaging

FAVORS LOCAL PRODUCERS

Norwegians, like all other respondents, tend to be skeptical towards large companies, especially when they don't know them very well.

Over half (52 %) of the population in Norway agrees that smaller producers are more climate-friendly than large, international companies.

A large share also trusts smaller companies more than larger ones, In the Nordics, 36 % trust smaller companies more than large ones and in Norway it's 33 %. Sweden and Denmark are at approximately the same levels.

INFO ON PRODUCT PACKAGING

Norwegians are far more interested in information regarding recycling possibilities, nutritional content and climate impact on the product packaging than their neighbors. They are also far less interested in information about whether the product is healthy.

Diet-conscious Norwegians (vegetarians, vegans, etc.) tend to focus more on the recycling possibilities and nutritional content than the diet-conscious consumers in neighboring countries.

RECYCLING

The importance of recyclable packaging is highest in the Nordic region (74 %) and only 13 % are skeptical and 45 % are willing to pay more for bio-degradable plastics.

Quite a lot of Norwegians also find it difficult to know whether packaging can be recycled (65 % vs. 59 % in Nordics). This is the same level as Denmark (69 %).

COMPLEX ATTITUDES TOWARDS PLASTICS

While 58 % of Norwegians mention plastics and microplastics in the ocean as one of the top three most important environmental issues, they have the lowest share of people concerned about the environmental consequences of plastic packaging.

This might be because most Norwegians state that they recycle considerable amount of their waste, which include plastic waste.

Norwegians also think it's important to buy products with recyclable packaging (74 %), more so than any of their neighbors (67 % on average in the Nordic region).



SUMMARY – NORWAY

Vegetarian products

PRODUCT RANGE

Regarding the range of vegetarian and vegan products in grocery stores, Norwegians are the least satisfied in the Nordic region. 29 % deem the product range as sufficient, compared with a Nordic average of 40 %.

They also find it much more difficult to find vegetarian/vegan products than their neighbors. 33 % find it easy, which is 9 percentage points below average.

Norwegians, along with Danes, are also the population with most respondents that *don't know* what to answer, i.e.. they are not interested in the products.

GROCERY STORES NOT REFLECTING THEIR DIET

Norway is the Nordic country where most agree that their diet is reflected by their grocery stores, with 82 % in agreement with the statement. This is far above the Nordic average of 54 %.

This share is lower with the diet-conscious part of the population (67 %) and higher with the omnivorous (85 %).

MEAT SUBSTITUTES MOST POPULAR AMONG YOUNGER RESPONDENTS

42 % of Norwegian respondents have tried some form of vegan/vegetarian substitute for conventional meat. Along with Denmark, this is the lowest share in the Nordics.

This share is much higher among young and urban Norwegians, and both groups have a share of 70 % having tried one or more products.

At the same time, Norwegians are most in agreement with that it's OK to label such products as "Hot dogs" and "Oat milk" etc.

LESS INTERESTED IN VEGETARIAN FOOD PREPARATION

Concerning concrete dietary habits like food preparation, Norwegians stand out by caring less than other countries. 30-40 % have no opinion on whether vegan and vegetarian foods takes too long to prepare, whether it tastes any good or if such foods offer sufficient variation.

These results are almost identical between Denmark and Norway, and in clear contrast with Sweden and Finland.



SWEDEN

GAME CHANGERS



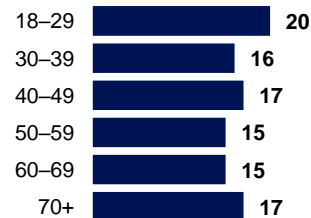


Seden

Gender



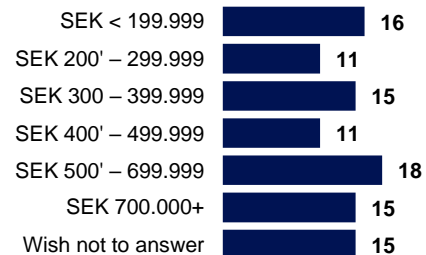
Age



Highest level of education



Household income



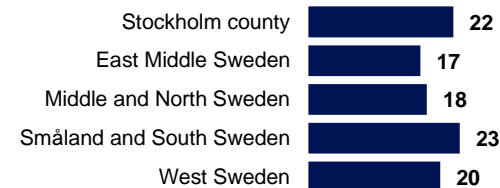
Marital status



Children living in household



Region



Diet





SUMMARY – SWEDEN

Environmental concern

MOST ENVIRONMENTALLY CONCERNED

Sweden has the most environmentally concerned respondents among the Nordic countries, which is evident in the questions regarding attitudes towards environmental issues, as well as habits regarding recycling and dietary choices.

MOST IMPORTANT ISSUES

64 % of Swedes perceive *climate change* and *climate emissions* to be the single most important environmental issue.

In a close second is *plastics and microplastics in the ocean*, mentioned by 60 % as one of the top three most important issue.

Omnivores think waste generation and overpackaging is more important than the diet-conscious (like vegans, vegetarians, etc.)

CONCERN ABOUT MAJOR CLIMATE CRISIS

A clear majority of Swedes are concerned about a major climate crisis: 56 % of Swedes reject that there is no major climate crisis facing the world.

Sweden also have the highest share of people agreeing that there is no major climate crisis. In other words, 1 out of 4 Swedes is not concerned about a major climate crisis facing the world.

HIGH SHARE OF VEGETARIANISM

Sweden has the lowest share of omnivores (eating both fish and meat) and the highest share of flexitarians (only occasionally eating fish and meat). Sweden and Finland have the highest share of vegetarians in the Nordic region.

In total, a higher share of Swedes has alternative diets than their Nordic neighbors. When grouping omnivores and all other diet configurations separately, the Swedish respondents are 72 % omnivorous while 28 % have put some conscious restriction on their diet.



SUMMARY – SWEDEN

Recycling and plastic packaging

FAVORS LOCAL PRODUCTS

2 out of 3 Swedes perceive products from small, local producers to be more climate-friendly. The notion is stronger with females and the diet-conscious, but is a general impression in the population. 1 out of 3 trusts smaller companies more than large ones.

INFO ON PRODUCT PACKAGING

According to Swedes, the most important information to list on packaging is whether the product can be recycled and how.

Swedes are more interested in info about where the product is manufactured than other Nordic countries.

Diet-conscious Swedes (vegetarians, vegans, etc.) focus on the importance of information regarding healthiness, climate impact of products and whether the product is organic.

RECYCLING

They also think it's important that the products they buy have recyclable packaging (66 %) and only 16 % are skeptical and 48 % are willing to pay more for biodegradable plastics.

Lower shares of the Swedish respondents think it's difficult to know whether packaging can be recycled (47 % vs. 59 % in Nordics).

PLASTICS IS A HIGH-SALIENCE ISSUE

The use and over-use of plastics is a high-salience issue in both in Sweden and in the Nordics as such. High shares of the respondents in Sweden are concerned with the environmental consequences of plastic packaging (67 %).



SUMMARY – SWEDEN

Vegetarian products

PRODUCT RANGE

Swedes are divided on questions regarding the range of vegan and vegetarian products in their grocery stores, but are more content than their neighbors. 50 % think it's sufficient, contrasted with 33 % in Norway and 34 % in Denmark.

GROCERY STORES NOT REFLECTING THEIR DIET

On the other hand, 44 % of Swedes agree that their grocery store reflects their diet compared to 54 % in the Nordics in total.

Norwegians are most happy, and here 82 % feel their grocery stores reflects their diet.

Swedes also find it easier to find vegan and vegetarian products than their Nordic neighbors.

ACCEPTING TOWARDS MEAT SUBSTITUTES

Swedes are also more prone to trying ready-made products. Only Finland has a higher share of people having tried vegan/vegetarian substitute products.

Higher shares of respondents think it's OK to label vegan/vegetarian products as «Hot dog», «Oat milk» etc. than in other countries, especially Denmark and Finland.

POSITIVE TOWARDS VEGETARIANISM

Concerning concrete dietary habits like food preparation, Sweden also stands out. Higher shares disagree that vegan/vegetarian foods take too long to prepare (39 % vs. 33 % in Nordics).

They also disagree that vegan/vegetarian products don't taste any good (42 % vs 36 % in Nordics).



FINLAND

GAME CHANGERS

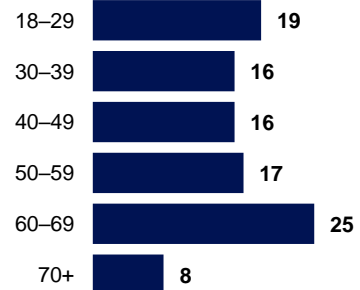


Finland

Gender



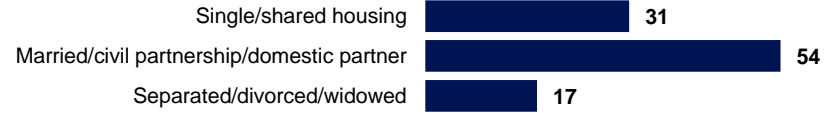
Age



Highest level of education



Marital status



Children living in household



Region



Diet



SUMMARY – FINLAND

Environmental concern

ENVIRONMENTALLY CONCERNED, BUT THE HABITS ARE MISSING

Finland occupies a middle ground among the Nordic countries. On some questions, like attitudes towards environmental issues and sustainability, they are as environmentally friendly as Sweden.

Regarding shares of the population being diet-conscious and interest in vegetarian products, they are mostly the same as Sweden. They don't, however, stand out when it comes to specific habits.

MOST IMPORTANT ISSUES

64 % of Finns perceive *climate change* and *climate emissions* to be the single most important environmental issue. This is the same number as in Sweden.

In a close second is *plastics and microplastics in the ocean*, mentioned by 59 % as one of the top three most important issue.

Global warming is more important to women, while men more often mention *poor quality of drinking water* and *soil erosion*.

CONCERN ABOUT MAJOR CLIMATE CRISIS

A clear majority of Finns is concerned about a major climate crisis: 68 % of Finns reject that there is no major climate crisis facing the world.

Far more women than men reject that there is no cause for alarm, and of the average 68 % there are 76 % women and 60 % men.

HIGH SHARE OF VEGETARIANISM

Finland has the second lowest share of omnivores (eating both fish and meat) and the highest share of flexitarians (only occasionally eating fish and meat). Finland (and Sweden) have the highest share of vegetarians in the Nordic region (6 % of the respondents).

In total, a somewhat higher share of Finns has alternative diets than their Nordic neighbors. When grouping omnivores and all other diet configurations separately, the Finnish respondents are 80 % omnivorous while 19 % have put some conscious restriction on their diet. This is not significantly different from the overall mean number.

SUMMARY – FINLAND

Recycling and plastic packaging

LOCAL PRODUCERS VERY POPULAR

Finland is the country with most positive sentiments towards smaller and local producers. 1 out of 2 Finns agree that smaller producers are more climate friendly, which is the highest share of all countries in the survey.

Their trust in smaller companies is at the same level, and is also highest in the survey.

INFO ON PRODUCT PACKAGING

For Finns, the most important information to list on packaging is whether the product can be recycled and how.

Information on the healthiness of products ranks much higher than in the Nordics, and is on par with the Baltics, which also value this info.

Diet-conscious Finns (vegetarians, vegans, etc.) focus on the importance of information regarding climate impact of products and whether the product is organic.

RECYCLING

Finns also think it's important that the products they buy have recyclable packaging (70 %) and they report higher knowledge regarding recyclable packaging.

55 % find it hard to know whether the packaging can be recycled, which is a high share, but lower than in other countries (except Sweden).

PLASTICS IS A HIGH-SALIENCE ISSUE

The use and over-use of plastics is a high-salience issue in Finland, even more than in the other Nordic countries.

79 % of Finns are either *fairly* or *very concerned* about the environmental consequences of packaging not made from recycled materials. Females more so than males (85 % vs 73 %).

SUMMARY – FINLAND

Vegetarian products

MOST SATISFIED WITH PRODUCT RANGE

Finns are most satisfied with the range of vegetarian/vegan products in their grocery stores in the Nordic region. 53 % deem the range of products as sufficient. The Nordic average is 35 %.

GROCERY STORES NOT REFLECTING THEIR DIET

As in most Nordic countries (Except Norway), only half of the population finds their grocery stores to fully reflect their diet.

Norwegians are most happy, and here 82 % feel their grocery stores reflects their diet.

Regarding questions about the ease of finding products and the range of products, Finns and Swedes are most happy with their grocery stores.

Finns also get inspired to buy vegan/vegetarian to a larger extent than their Nordic neighbors.

COMPLEX ATTITUDES TOWARDS MEAT SUBSTITUTES

Finland has the higher share of people having tried vegan/vegetarian substitute products.

They are also most skeptical towards the idea of labeling the products like conventional meat and dairy products. 39 % either *disagree* or *strongly disagree* that it's OK to label these products as "hot dogs", "oat milk", etc.

VERY POSITIVE TOWARDS VEGETARIANISM

Concerning concrete questions about dietary habits and experiences like ease of food preparation, whether vegetarian/vegan products taste good, variation in vegetarian/vegan products and time consumption when making vegetarian/vegan dishes, Finland has the most positive respondents in the Nordic region (and Baltics).

They also have the clearest desire to eat more vegetarian/vegan food among all respondents in the survey.



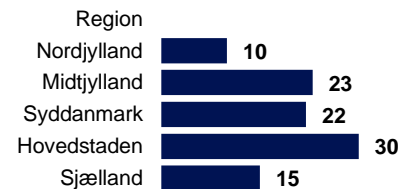
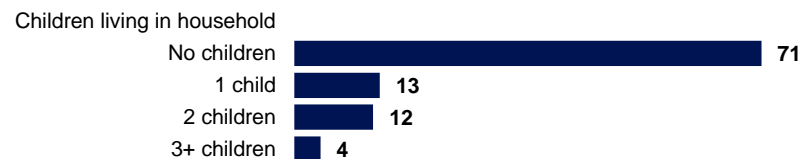
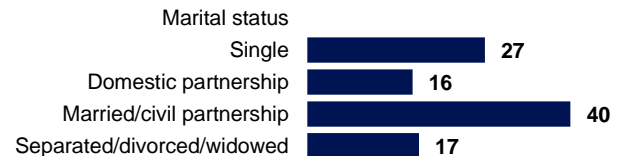
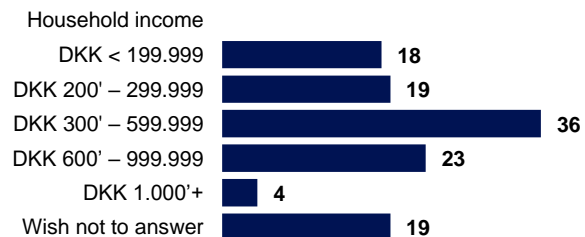
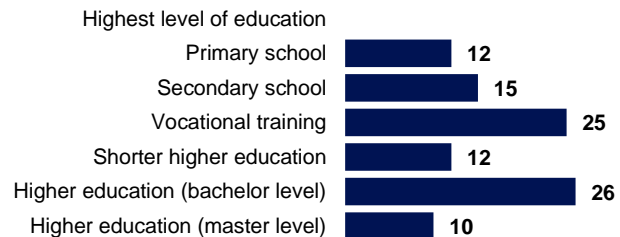
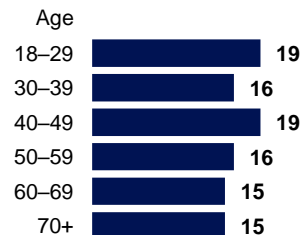
DENMARK

GAME CHANGERS





Danmark



SUMMARY – DENMARK

Environmental concern

CARE FOR ENVIRONMENT, NOT VEGETARIANISM

While Danes are on par with their Nordic neighbors on most questions regarding environmental concern, there is a big difference in dietary choices.

Danes are the least diet-conscious in the Nordics and 85 % report being omnivorous (eating both meat and fish). This is higher than in neighboring countries, and on the same level as the Baltics.

MOST IMPORTANT ISSUES

64 % of Danes perceive *climate change* and *climate emissions* to be the single most important environmental issue. This is the same number as in Sweden and Finland.

In second place is *plastics and microplastics in the ocean*, mentioned by 53 % as one of the top three most important issue. This is also lower than in other Nordic countries.

CONCERN ABOUT MAJOR CLIMATE CRISIS

As in the Nordic region in general, a clear majority of Danes are concerned about a major climate crisis: 65 % of Danes reject that there is no major climate crisis facing the world.

A difference in Denmark is that these answers are far less divided between gender.

HIGHEST SHARE OF VEGANS AND OMNIVORES

Denmark has the highest share of omnivores (eating both fish and meat) in the Nordic region. They do however also have the largest share of vegans (4 %).

SUMMARY – DENMARK

Recycling and plastic packaging

MOST FRIENDLY COUNTRY TOWARDS LARGE PRODUCERS

Denmark is the country with the least negative sentiments towards larger producers.

On all questions regarding small vs. large companies, their climate-friendliness and trust, the Danes are highest on "neither agree nor disagree".

Their trust in smaller companies compared to large ones is the lowest of all countries in the survey.

INFO ON PRODUCT PACKAGING

Danes more often than others have no specific opinion about what information they want on the product packaging.

Highest ranks info about recyclability at 52 % followed by information regarding where the product is manufactured at 34 %.

Diet-conscious Danes (vegetarians, vegans, etc.) focus on the importance of information regarding climate impact of products and whether the product is organic. This pattern is observed in other countries as well, like Finland.

RECYCLING

Danes put relatively low importance on recyclable packaging (53 % vs. 64 % on average) and they report relatively lower knowledge regarding whether products can be recycled.

69 % find it hard to know whether the packaging can be recycled, which is the highest share, but only slightly higher than Norway.

PLASTICS IS A HIGH- SALIENCE ISSUE

The use and over-use of plastics is a high-salience issue also in Denmark, and they are somewhat more concerned than their neighbors.

73 % of Danes are either *fairly* or *very concerned* about the environmental consequences of packaging not made from recycled materials. For Sweden this number is 67 % and 58 % in Norway.

SUMMARY – DENMARK

Vegetarian products

AVERAGE SATISFACTION WITH PRODUCT RANGE

32 % of Danes are satisfied with the range of vegetarian/vegan products in their grocery stores, which is the same level of satisfaction as in Norway. Another similarity is the share of respondents answering *Don't know*, which amounts to 30 %.

This is in line with the general attitudes towards vegetarian/vegan foods in Denmark, which is lower than in Sweden and Finland, and equal to Norway.

GROCERY STORES NOT REFLECTING THEIR DIET

As in most Nordic countries (Except Norway), below half of the population finds their grocery stores to fully reflect their diet. In Denmark, this is even clearer. 40 % agree with the statement.

Norwegians are most happy, and here 82 % feel their grocery stores reflects their diet.

Regarding questions about the ease of finding products and the range of products, Danes resemble Norwegians in that they most often *don't know*.

NEGATIVE ATTITUDES TOWARDS MEAT SUBSTITUTES

Denmark has the lowest share of people having tried vegan/vegetarian substitute products.

57 % answers *None of the above*, compared to 36 % in Finland and 41 % in Sweden.

The Danes' resistance to the idea of labeling the products like conventional meat and dairy products is relatively high. 37 % either *disagree* or *strongly disagree* that it's OK to label these products as "hot dogs", "oat milk", etc. Only Finns disagree more (39 %)

VERY NEGATIVE TOWARDS VEGETARIANISM

Concerning concrete questions about dietary habits and experiences like ease of food preparation, whether vegetarian/vegan products taste good, variation in vegetarian/vegan products and time consumption when making vegetarian/vegan dishes, Denmark has the most indifferent respondents.

They have the highest share of people having no desire to eat more vegetarian/vegan products (46 %).

In general, they are about as indifferent to vegetarian/vegan foods and cooking as the Norwegians.

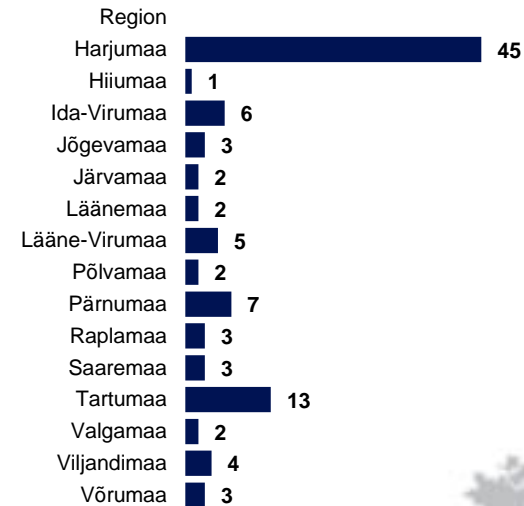
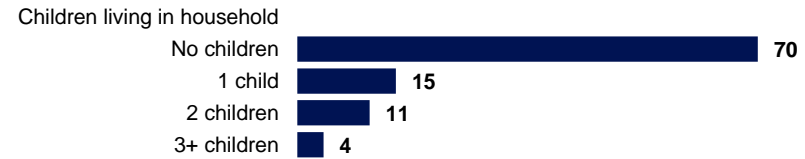
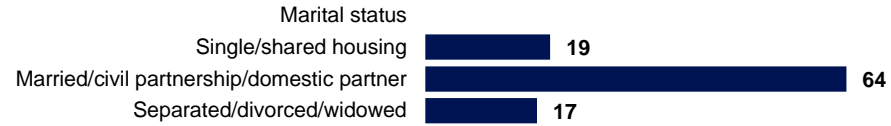
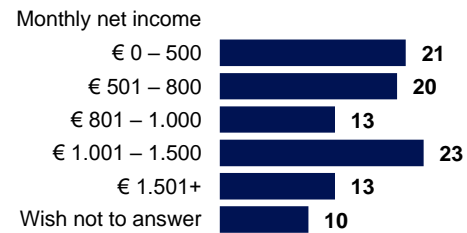
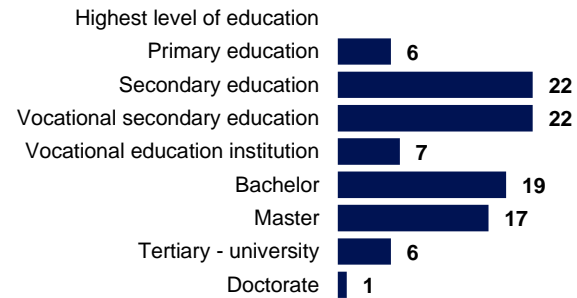
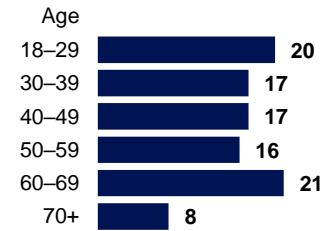


ESTONIA

GAME CHANGERS



Estonia



SUMMARY – ESTONIA

Environmental concern

LOW CONCERN FOR ENVIRONMENT, BUT LIKES VEGETARIAN SUBSTITUTES

The Baltics are somewhat less concerned about the environment than the Nordics, but with some regional differences.

In Estonia, the environmental concern is lowest, both in the Baltics and in the survey. They are most skeptical towards climate change and least concerned about the environmental consequences of plastic packaging.

They are, however, also quite positive towards vegetarian/vegan substitutes, and more so than their Baltic neighbors.

MOST IMPORTANT ISSUES

In contrast to the Nordic countries, the Baltics put less weight on climate change and global warming, and more weight on the importance of dealing with waste and de-forestation.

In Estonia, plastics in the ocean and de-forestation is regarded as the most important environmental issues. Relative to the other Baltic countries, over-packaging of consumer goods is seen as more important (36 % vs. 29 % in Baltic average).

CONCERN ABOUT MAJOR CLIMATE CRISIS

In the Baltic region as such, there is a lower concern about a major climate crisis facing the world. Within the Baltics, this concern is lowest in Estonia:

45 % of Estonians reject that there is no major climate crisis facing the world, while 31 % agrees with the statement.

AVERAGE SHARE OF ALTERNATIVE DIETS

Within the Baltics, Estonia has an average share of omnivores (eating both fish and meat) at 68 %. This is higher than in Latvia (84 %) and lower than in Lithuania (88 %).

SUMMARY – ESTONIA

Recycling and plastic packaging

LARGE VS. SMALL PRODUCERS

The questionnaire maps the sentiments towards large and small producers, the level of trust and if they're seen as more or less climate-friendly.

In general, the Baltic countries are somewhat positive to smaller producers, and the levels are quite average in Estonia. They do however stand out on the question regarding trust towards small rather than large producers.

Here, 39 % trust smaller companies more than large ones, compared with 36 % in Latvia and 33 % in Lithuania.

INFO ON PRODUCT PACKAGING

Estonians more often than other Baltic countries want to know where their products are manufactured.

Following this is info about whether the product is healthy (55 %), which is at the same level in all Baltic countries.

Estonians are more interested in recyclability of products than their neighbors.

RECYCLING

58 % of Estonians see it as important to buy products with recyclable packaging and 66 % think it's difficult to know whether products can be recycled or not.

Estonians are also most skeptical towards products made from recycled plastics (28 % vs 22 % regional average).

PLASTICS AND PACKAGING

Estonia has a somewhat lower share of the respondents being concerned about the environmental consequences of plastic packaging than in other Baltic countries, but the number is still high.

71 % are either fairly or very concerned about this, which is a higher level of concern than in most Nordic countries (except Denmark).

For Latvia and Lithuania the numbers are 86 % and 85 % respectively.

SUMMARY – ESTONIA

Vegetarian products

AVERAGE SATISFACTION WITH PRODUCT RANGE

30 % of Estonians are satisfied with the vegetarian/vegan product range in their grocery stores. This is the same level as in Lithuania, and higher than in Latvia.

About the same number of people think it's easy to find vegetarian/vegan food in their grocery store.

GROCERY STORES REFLECTING THEIR DIET TO A LARGE EXTENT

A very high share of respondents (85 %) are also feeling that their grocery stores reflect their diets, but this share is much lower with Estonians with alternative diets.

The average level is highest in the Baltics.

ATTITUDES TOWARDS MEAT SUBSTITUTES

Estonian respondents have tried more vegetarian/vegan substitutes for ordinary meat than their neighbors.

While the share of people that haven't tried any of the products is the same in the three countries, we see that Estonians more often have tried several of the listed products.

Estonians are also most positive towards labeling these products like ordinary meat and dairy products.

MOST POSITIVE TOWARDS VEGETARIANISM

Concerning concrete questions about dietary habits and experiences like ease of food preparation, whether vegetarian/vegan products taste good, variation in vegetarian/vegan products and time consumption when making vegetarian/vegan dishes, Estonia has the most positive and least skeptical respondents.

They have the lowest share of people saying they have *no desire* to eat more vegetarian/vegan products (49 %). This is still a high number, however.



LATVIA

GAME CHANGERS

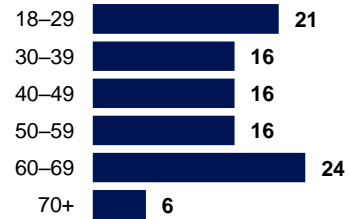


Latvia

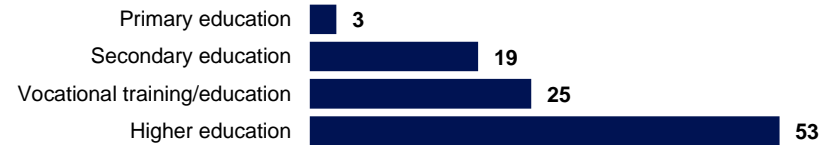
Gender



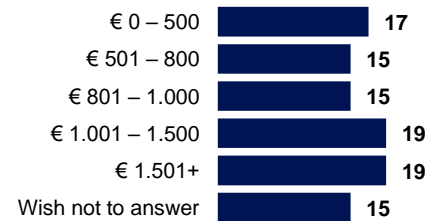
Age



Highest level of education



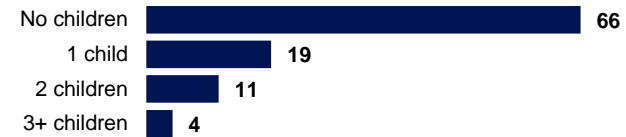
Household income



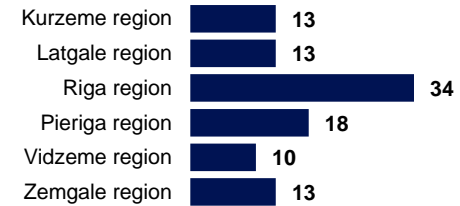
Marital status



Children living in household



Region



Diet



SUMMARY – LATVIA

Environmental concern

HIGHEST SHARE OF ALTERNATIVE DIETS

Within the Baltics, Latvia is placed in the middle regarding environmental concern, with Estonia below and Lithuania above.

Latvia has a higher share of people with an alternative diet (16 %) and the lowest share of omnivores (eating both meat and fish). At the same time, Latvians are somewhat more skeptical towards eating more vegetarian/vegan food than their neighbors.

MOST IMPORTANT ISSUES

In contrast to the Nordic countries, the Baltics put less weight on climate change and global warming, and more weight on the importance of dealing with waste and de-forestation.

In Latvia, dealing with the amount of waste we generate is seen as the most important environmental topic (61 %), more so than in Estonia and Lithuania (45-47 %) as well.

CONCERN ABOUT MAJOR CLIMATE CRISIS

As in the Baltic region in general, there is a fairly high concern about a major climate crisis facing the world: 53 % of Latvians reject that there is no major climate crisis facing the world.

This number is higher than in Estonia, but lower than in Lithuania.

HIGHEST SHARE OF ALTERNATIVE DIETS

Within the Baltics, Latvia has the highest share of alternative diets at 16 %.

They also have the highest share of flexitarians (only occasionally eating meat and fish).

SUMMARY – LATVIA

Recycling and plastic packaging

LARGE VS. SMALL PRODUCERS

The questionnaire maps the sentiments towards large and small producers, the level of trust and if they're seen as more or less climate-friendly.

In general, the Baltic countries are somewhat positive to smaller producers, and the levels are somewhat higher in Latvia. This is seen in the question regarding the climate-friendliness of smaller producers in contrast with larger ones, where 44 % state that smaller is more climate-friendly. The Baltic average is 49 %.

INFO ON PRODUCT PACKAGING

The single most important info for Latvians is whether the product is healthy (53 %), which is at the same level in all Baltic countries.

Latvians don't deem any specific info as more important than in Estonia or Lithuania, and have higher levels of indifference on this question.

RECYCLING

55 % of Latvians see it as important to buy products with recyclable packaging and 70 % think it's difficult to know whether products can be recycled or not. This share is the largest of the Baltic countries.

Latvians on average regarding skepticism towards products made from recycled plastics (20 % vs 22 % regional average).

PLASTICS IS A HIGH-SALIENCE ISSUE

Latvia has a very high share of the respondents being concerned about the environmental consequences of plastic packaging than in all other countries in the survey.

86 % are either fairly or very concerned about this, and only 10 % are not concerned.

For Estonia and Lithuania the numbers are 71 % and 85 % respectively.

SUMMARY – LATVIA

Vegetarian products

LOWEST SATISFACTION WITH PRODUCT RANGE

21 % of Latvians are satisfied with the vegetarian/vegan product range in their grocery stores. This is the lowest level of satisfaction in the Baltics.

Latvians also think it's quite hard to find these products, and 25 % disagree that it's easy to find.

GROCERY STORES REFLECTING THEIR DIET

72 % think that their grocery stores reflect their diets. As in other countries, this share is lower with the respondents with alternative diets.

ATTITUDES TOWARDS MEAT SUBSTITUTES

Latvian respondents have tried less vegetarian/vegan substitutes for ordinary meat than their neighbors, especially Estonians. The difference between Lithuania and Latvia is much smaller.

While the share of people that haven't tried any of the products is the same in the three countries, we see that Estonians more often have tried several of the listed products.

Latvians, more than others, have no opinion regarding labelling of vegetarian/vegan products. 17 % don't know whether they think it's OK, but 28 % agree with the statement.

SOMEWHAT NEGATIVE TOWARDS VEGETARIANISM

Concerning concrete questions about dietary habits and experiences like ease of food preparation, whether vegetarian/vegan products taste good, variation in vegetarian/vegan products and time consumption when making vegetarian/vegan dishes, Latvia has the most negative/least positive respondents.

They more often than others think that vegetarian/vegan foods do not taste any good (28 % vs. 21 % in Lithuania/24 % in Estonia).

56 % of Latvians have no desire to eat more vegetarian/vegan food.



LITHUANIA

GAME CHANGERS

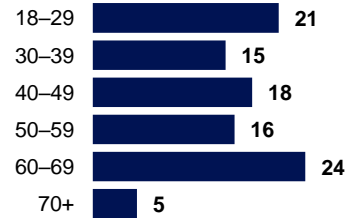


Lithuania

Gender



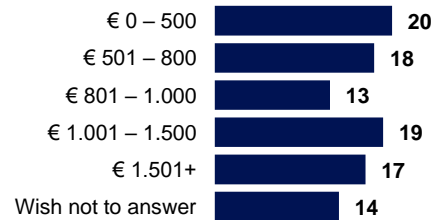
Age



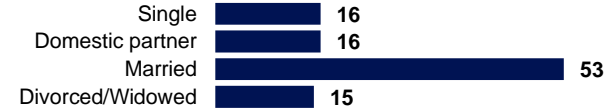
Highest level of education



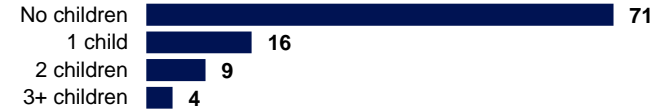
Monthly net household income



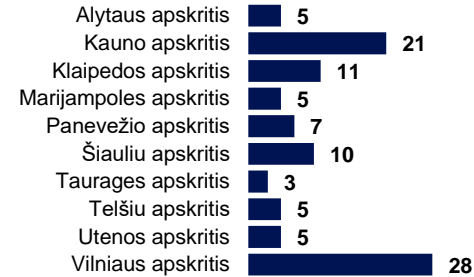
Marital status



Children living in household



Region



Diet



SUMMARY – LITHUANIA

Environmental concern

HIGHEST CONCERN IN THE BALTIC REGION

While the Baltics are markedly less concerned about the environment than in the Nordics, Lithuania are more concerned than Estonia and Latvia.

Danes are the least diet-conscious in the Nordics and 85 % report being omnivorous (eating both meat and fish). This is higher than in neighboring countries, and on the same level as the Baltics.

They are also more concerned about products having recyclable packaging than their neighbors.

MOST IMPORTANT ISSUES

In contrast to the Nordic countries, the Baltics put less weight on climate change and global warming, and more weight on the importance of dealing with waste and de-forestation.

In Lithuania, global warming and climate emissions (54 %) and de-forestation (54 %) are regarded as the most important environmental issues.

Relative to the other Baltic countries, these issues are also somewhat more important to Lithuanians.

CONCERN ABOUT MAJOR CLIMATE CRISIS

As in the Baltic region in general, there is a fairly high concern about a major climate crisis facing the world:

65 % of Lithuanians reject that there is no major climate crisis facing the world.

This number is on par with the Scandinavian countries, and by far the highest in the Baltics.

HIGHEST SHARE OF OMNIVORES

Lithuania has the highest share of omnivores (eating both fish and meat) in the Baltic region at 88 %. This is compared with Latvia at 84 % and Estonia at 86 %.

SUMMARY – LITHUANIA

Recycling and plastic packaging

LARGE VS. SMALL PRODUCERS

The questionnaire maps the sentiments towards large and small producers, the level of trust and if they're seen as more or less climate-friendly.

Lithuania tends to be somewhat less skeptical towards larger producers than their neighbors.

42 % agree that products from local producers are more climate-friendly, compared with Latvia at 56 % and Estonia at 54 %.

INFO ON PRODUCT PACKAGING

The single most important info for Lithuanians is the nutritional content of the product (66 %).

Following this is info about whether the product is healthy (53 %), which is at the same level in all Baltic countries.

Lithuanians are also far more concerned about whether the product is organic than other Baltic respondents (35 % vs 17 % in Latvia and 26 % in Estonia).

RECYCLING

70 % of Lithuanians see it as important to buy products with recyclable packaging which just as high than in the Nordic countries.

64 % think it's difficult to know whether products can be recycled or not.

Lithuanians also have the least skepticism towards products made from recycled plastics among the Baltic countries (19 % vs 22 % regional average).

PLASTICS IS A HIGH-SALIENCE ISSUE

Lithuania, along with Latvia, has a very high share of the respondents being concerned about the environmental consequences of plastic packaging than in all other countries in the survey.

85 % are either fairly or very concerned about this, and only 13 % are not concerned.

For Estonia and Latvia the numbers are 71 % and 86 % respectively.

SUMMARY – LITHUANIA

Vegetarian products

SATISFACTION WITH PRODUCT RANGE

31 % of Lithuanians are satisfied with the vegetarian/vegan product range in their grocery stores. This is the same level as in Estonia, and higher than in Latvia.

Lithuanians find it much more easy to find vegetarian/vegan products than their neighbors, and 37 % agree with the statement.

GROCERY STORES REFLECTING THEIR DIET

A very high share (73 %) of respondents think that their grocery stores reflect their diets, but this share is much lower with Estonians with alternative diets.

Only Estonians are more satisfied with their grocery stores regarding their diets.

ATTITUDES TOWARDS MEAT SUBSTITUTES

Lithuanian respondents, along with Latvian respondents, have tried less vegetarian/vegan substitutes for ordinary meat than Estonians. The difference between Lithuania and Latvia is much smaller.

While the share of people that haven't tried any of the products is the same in the three countries, we see that Estonians more often have tried several of the listed products.

About 1 out of 4 Lithuanians think it's OK to label these products as ordinary meat and dairy products.

SOMEWHAT INDIFFERENT TOWARDS VEGETARIANISM

Concerning concrete questions about dietary habits and experiences like ease of food preparation, whether vegetarian/vegan products taste good, variation in vegetarian/vegan products and time consumption when making vegetarian/vegan dishes, Lithuania places themselves between their Baltic neighbors.

While they have the lowest share saying vegetarian foods doesn't taste any good (21 %), 51 % have no desire of eating more vegetarian/vegan foods.

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