THE ORKLA SUSTAINABLE LIFE BAROMETER

Executed by Ipsos for Orkla

Erik Horgmo, Research Account Manager
Giedre Maciniene, Senior Research Executive

November 2021

GAME CHANGERS

THE SURVEY AND IMPORTANT CHANGES THIS YEAR

Orkla Sustainable Life Barometer sets out to map consumer needs and attitudes on a wide range of topics related to climate, sustainability and everyday choices in both the Baltics and the Nordic region.

This year, as the former years, plastics in the ocean, global warming and dealing with waste are still the most important topics for our respondents in 2021.

The media plays a big role in what we find the most important, and in a year that again has been mostly focused on the pandemic a lot of other topic do lose a bit of their attention.

The most striking addition to this year's survey is under the question addressing what the most important environmental topics are. We added the alternative “Natural disasters” which is an extension of the former “flooding” alternative. This seems to have uncovered an important topic on people's minds, jumping from 7% to 24%. This has other topics decrease a few points, not meaning they are less important than before, but that “natural disasters” was an important addition to see the fuller picture.

We have also added to the “Wildlife conservation” option “Biological diversity”. We are not sure how much this has affected our answers, as this topic continues to grow as it did last year. But this is now one of the steadiest growing topics we cover, going from 17% in 2019 to 24% in 2021.

RESEARCH OVERVIEW

METHODOLOGY

Quantitative web study.

TARGET GROUP

Representative for population in each country, 18 years old +.

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: 9-10 minutes.

Fieldwork was conducted in October-November 2021.

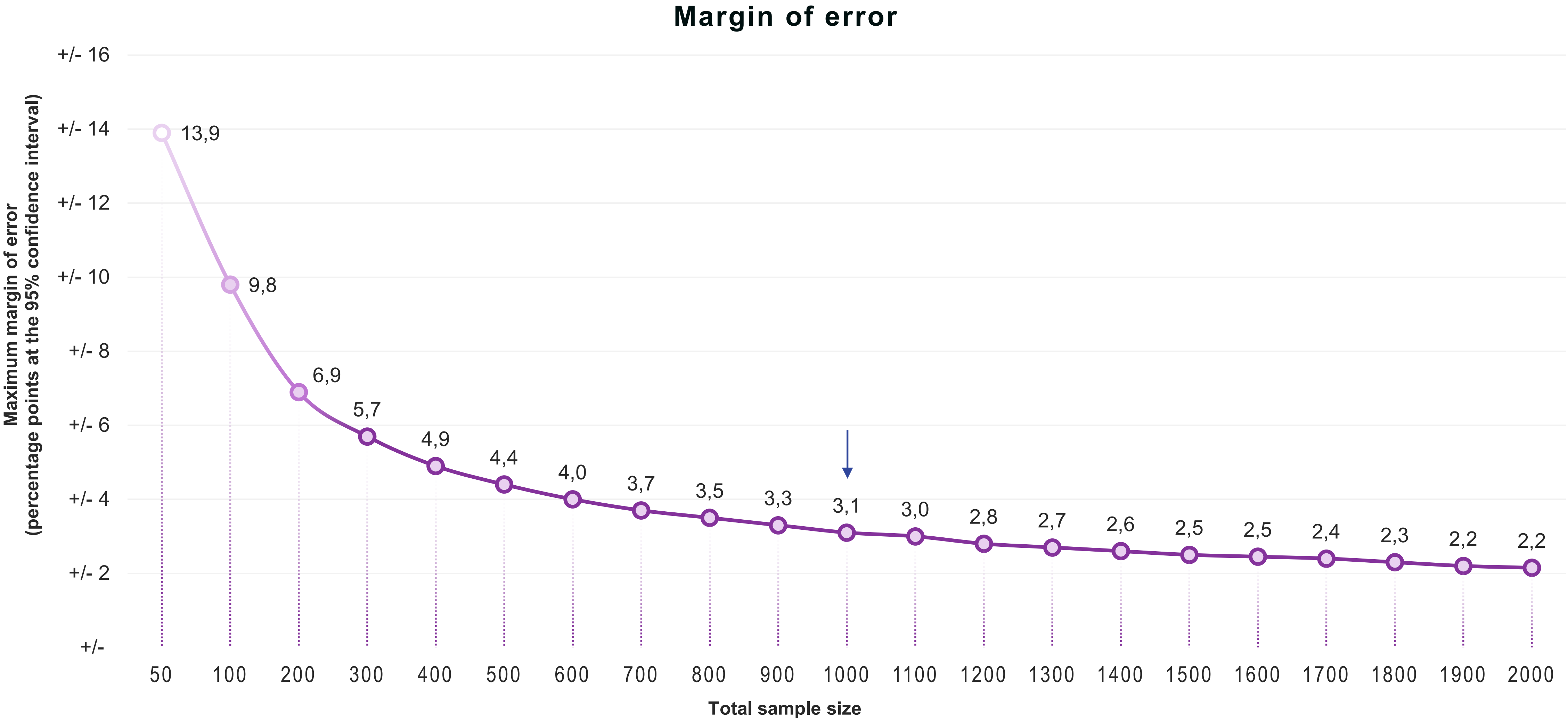
THE SCALE

To better understand the percentage points we are about to explore. Giving them some context might be useful.

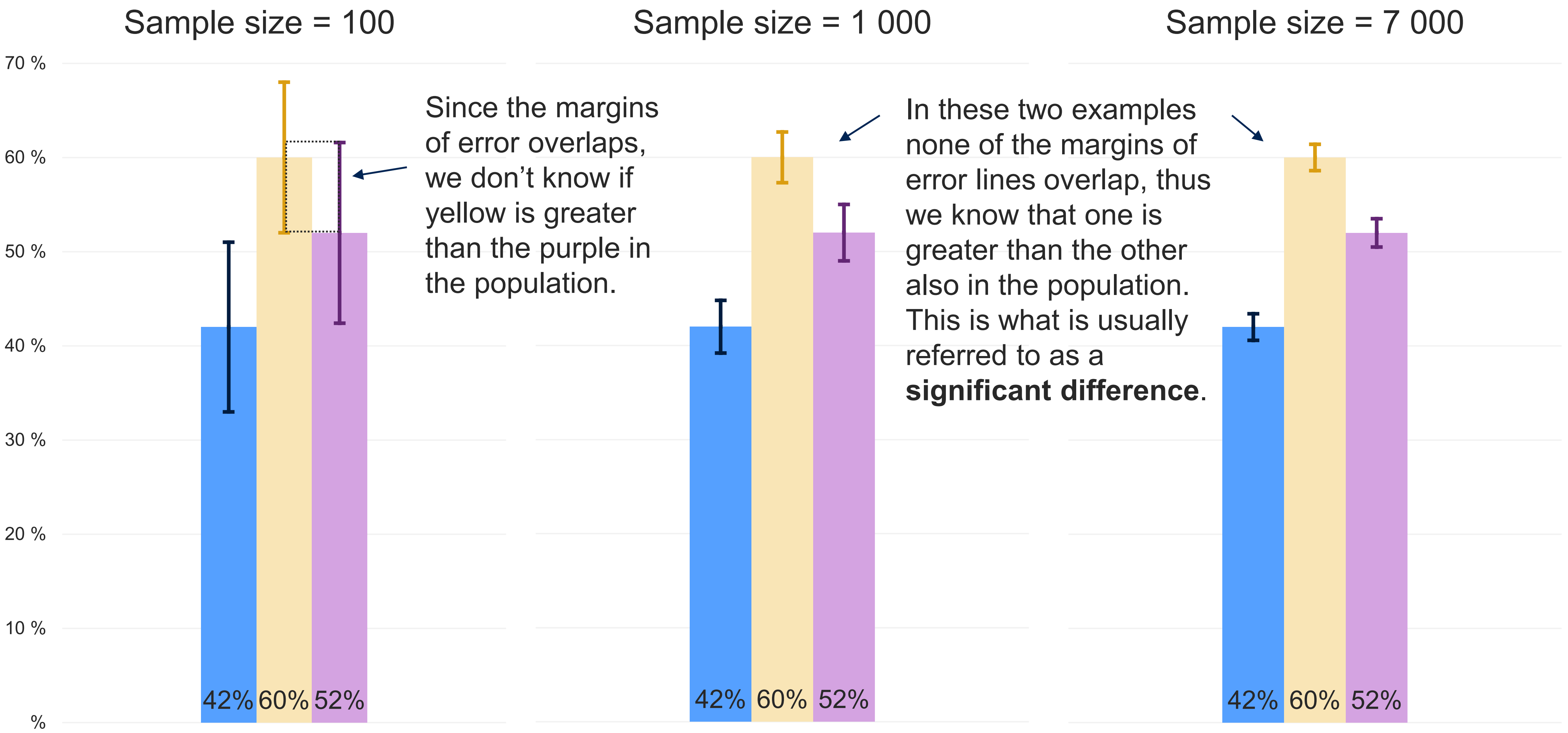
There are approximately **25 million people** 18 years or older living in the countries of the survey.

This means that a **1% change** in the data, potentially **represents 250.000 people**.

MARGIN OF ERROR, BASED ON SAMPLE SIZE



MARGIN OF ERROR, BASED ON SAMPLE SIZE



ATTITUDES TOWARDS SUSTAINABILITY

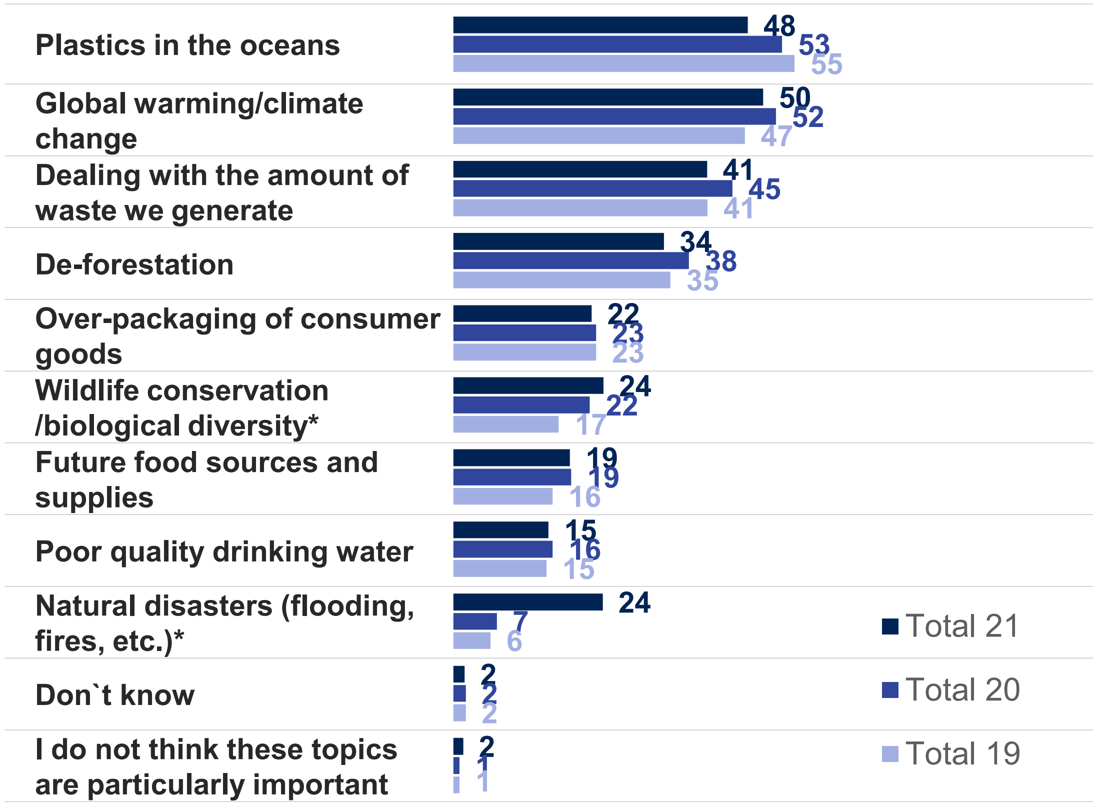
2

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 in the oceans
- Global warming/climate change
- Dealing with the amount of waste we generate
- De-forestation
- Over-packaging of consumer goods
- Wildlife conservation / *biological diversity* (2021)
- Future food sources and supplies
- Poor quality drinking water
- Natural disasters (flooding, fires, etc.) (2021)

NATURAL DISASTERS COMING IN STRONG



While plastics in the ocean, global warming and dealing with waste are still the most important topics for our respondents in 2021. But the expansion of “natural disasters” (changed from “flooding” in 2021) grabs quite a few percentage points from the top topics in this question. This comes in as our 5th most important topic this year, compared to being dead last the last couple of years. This clearly reveals that the scope of this topic was missing in earlier iterations of our survey and that the data has a stronger explanatory power than before. Newly expanded is also “wildlife conservation”, where we have added the aspect of “biological diversity” to the alternative.

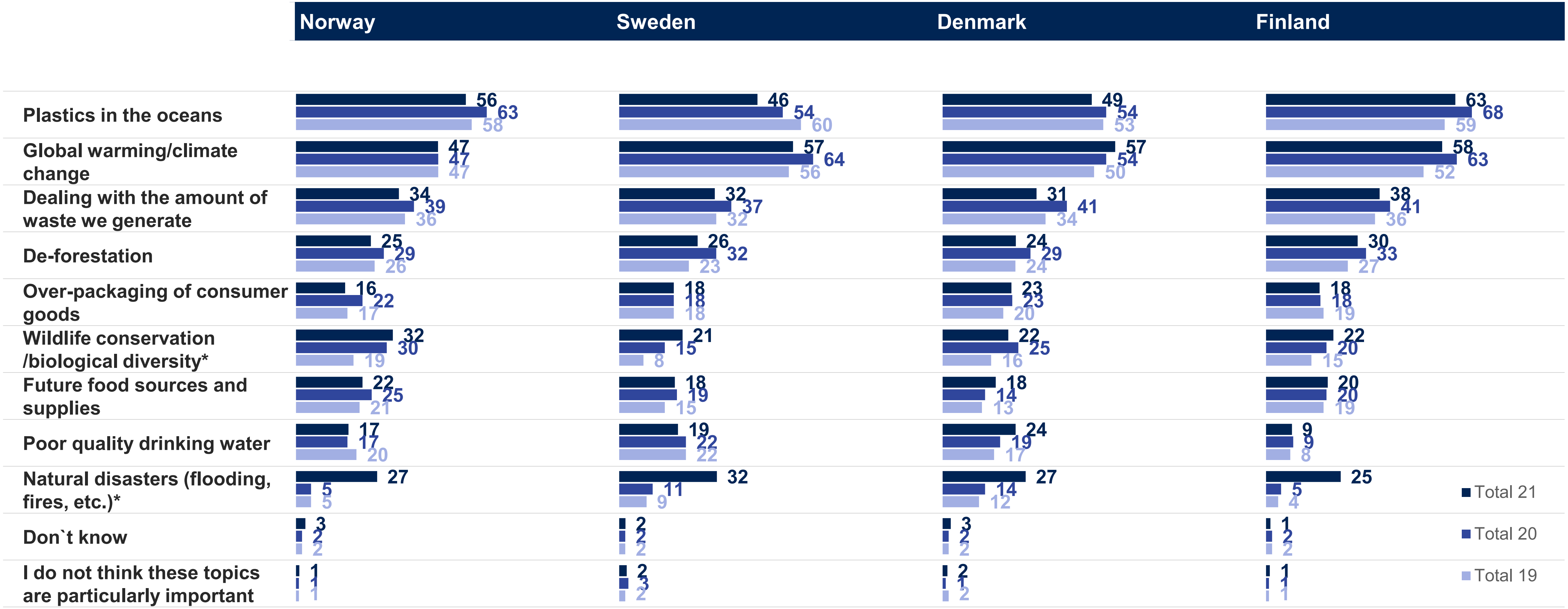
We do think that the broader problem climate change is resulting in, namely record-breaking weather has been quite a focal point in the news the last year and it seems appropriate to assume that this will continue grabbing people's attention as new records are set.

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?

THE NORDICS

Focusing on the Nordic countries we can see there is a big jump for natural disasters in all countries, but the jump is a bit bigger for Norway and Finland, though Sweden has the highest shares.

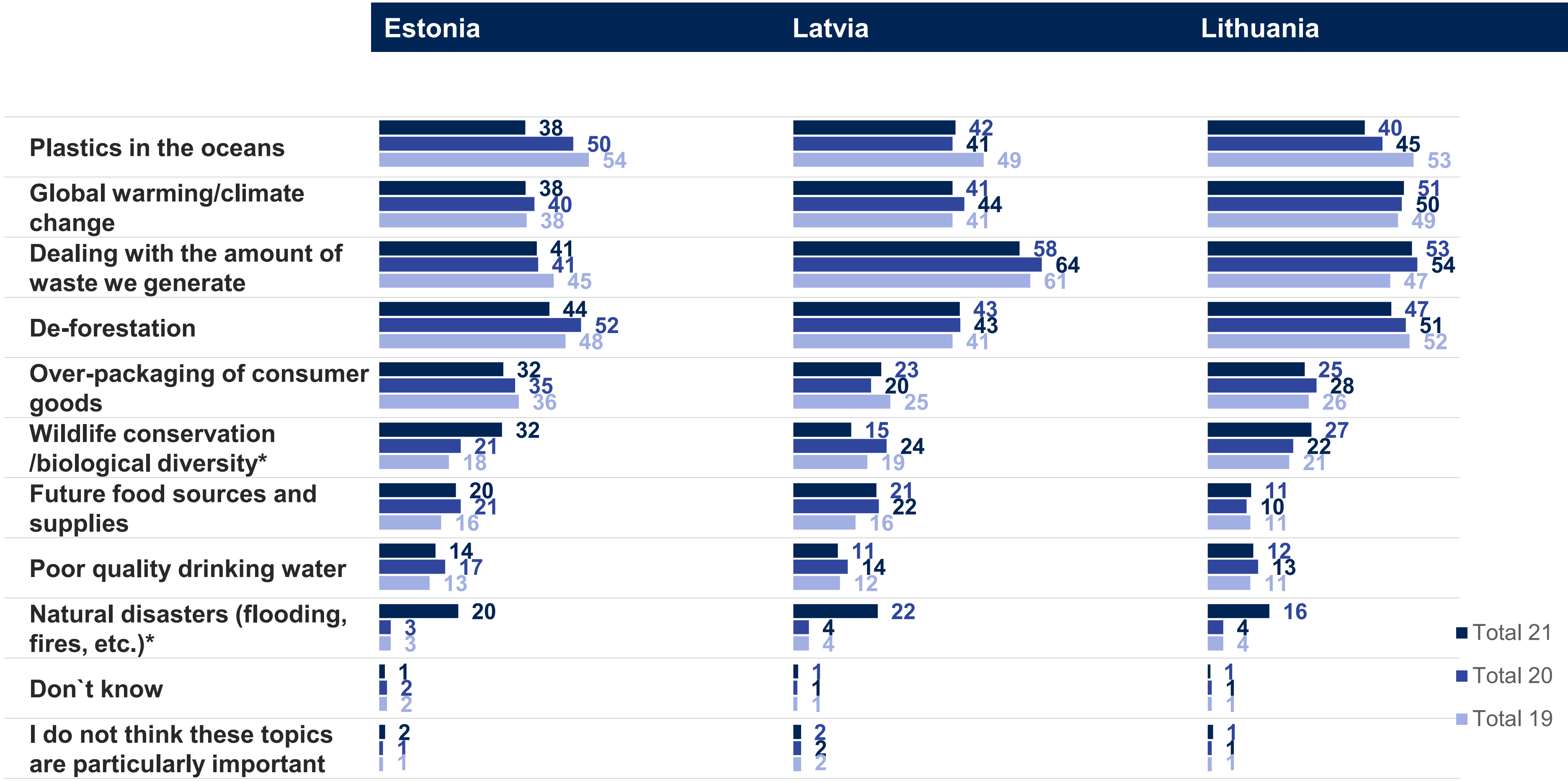


Base: All, N=7000 (1000 pr. country)

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?

THE BALTICS

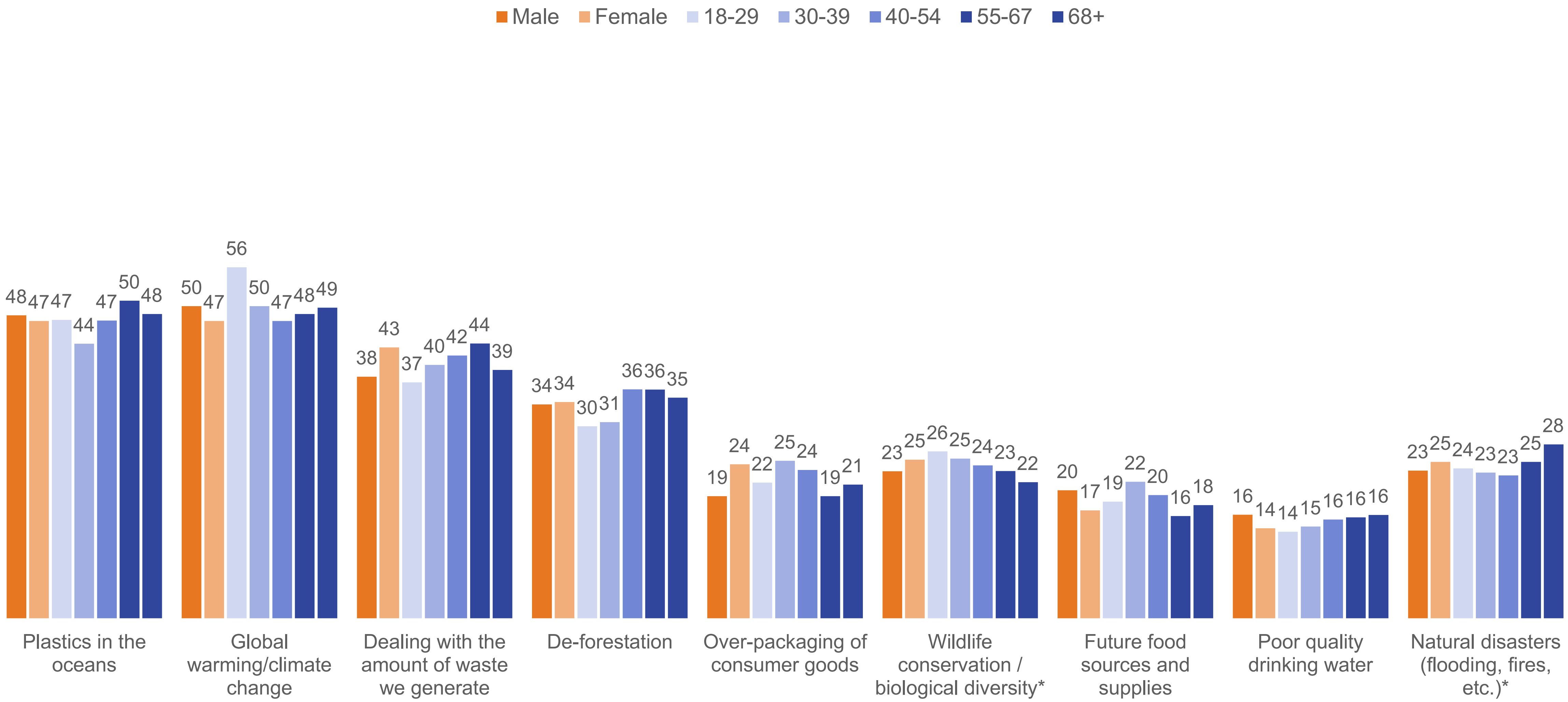
Within the Baltics the numbers for “natural disasters” are not as high as in the Nordics, but the jump is still overwhelming. “Wildlife/Biological” has taken either a big decrease (Latvia) or a steep increase (Estonia).



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?

DEMOGRAPHIC BREAKOWN



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

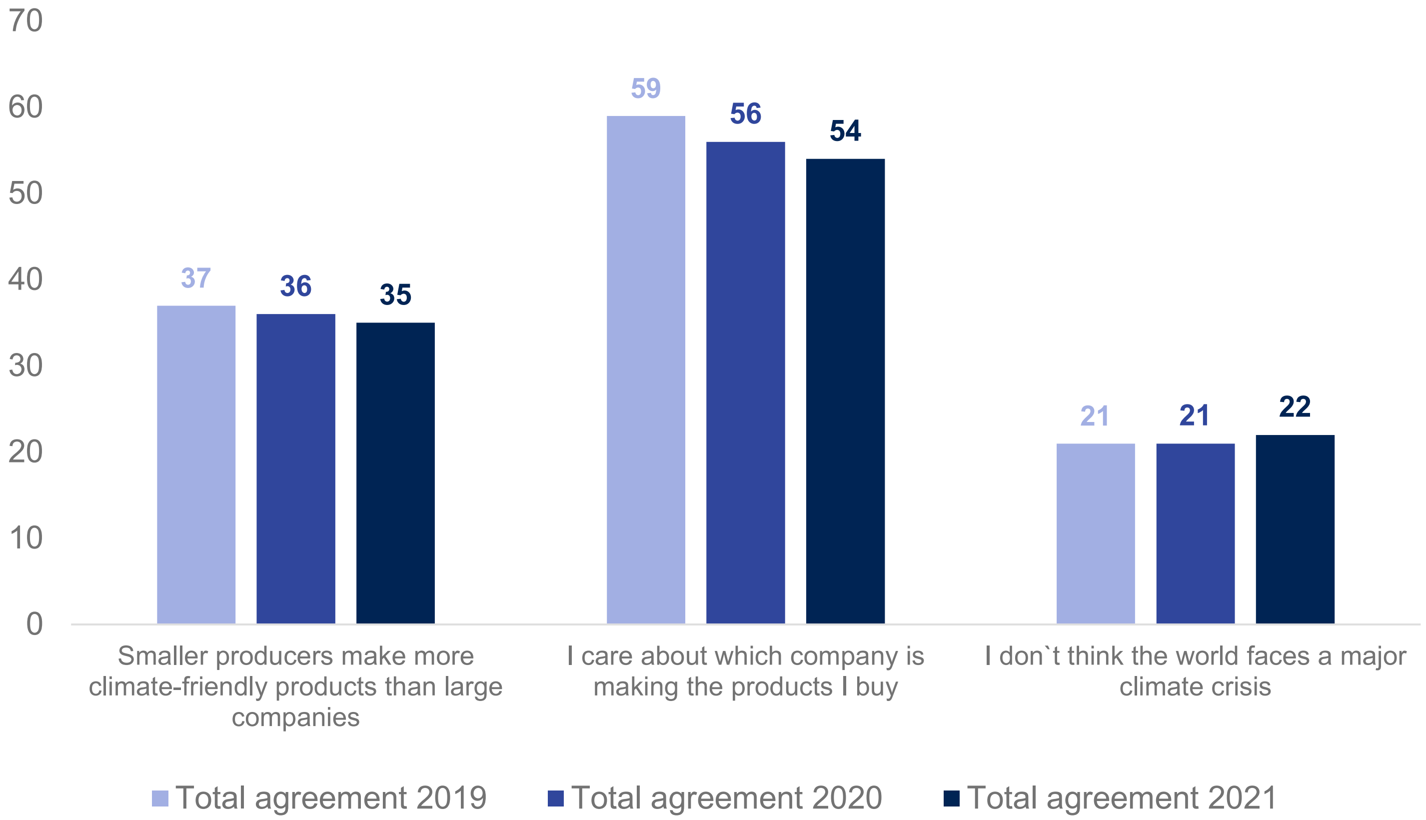
Q1.1. In your view, what are the three most important environmental topics we are facing today? That is, the top environmental topics you feel should receive the greatest attention?

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

- Smaller producers make more climate-friendly products than large companies
- 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
- I think it’s difficult to know if a product is sustainable or not
- I try to buy brands and products that I perceive as sustainable
- I avoid products from companies with a weak sustainability profile
- I prefer to buy products I know have a lower climate impact
- It’s hard to identify the climate footprint of a product (2021)
- I worry about climate change (2021)

Scale 1-5

MODEST DECREASE IN CARE ABOUT THE ORIGIN OF THE PRODUCT ONE BUYS

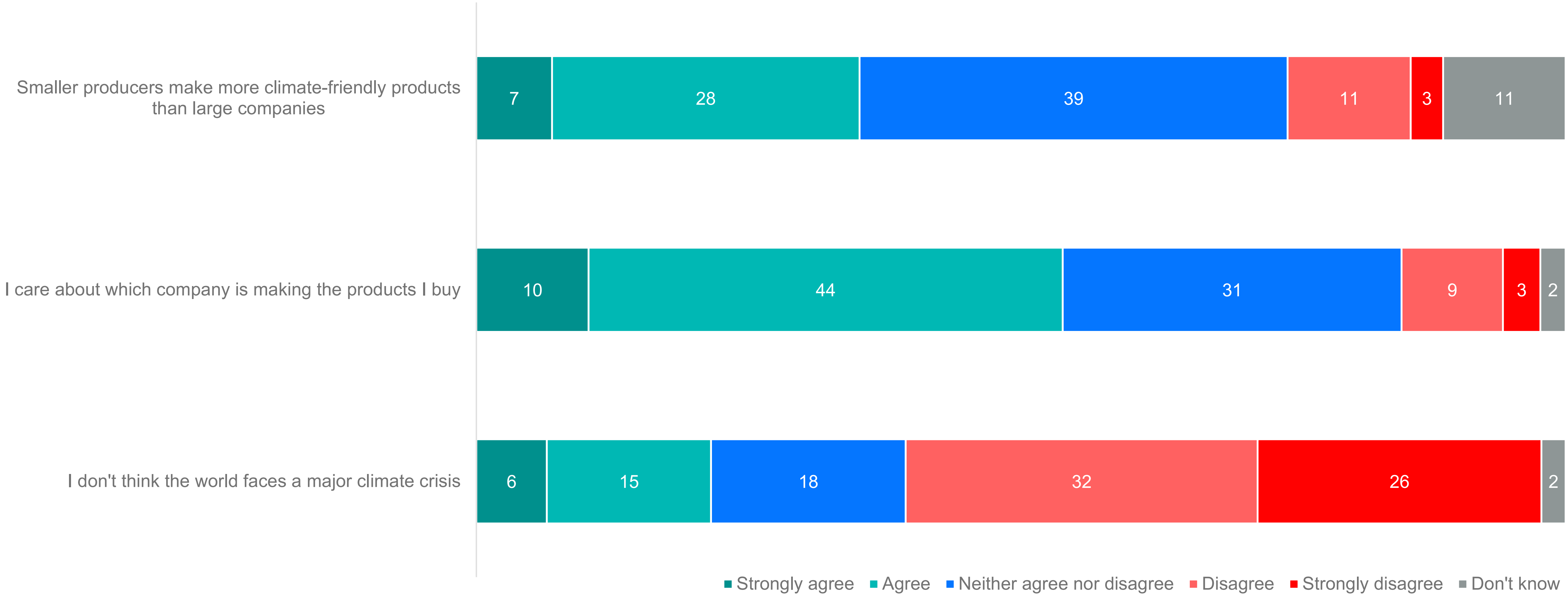


Base: All, N=7000 (1000 pr. country)
Q1.2 To what extent do you agree or disagree to these statements?

- 35 % of the sample selection believe that smaller producers make more climate-friendly products than lager companies. We have seen a small decrease over the years on this statement.

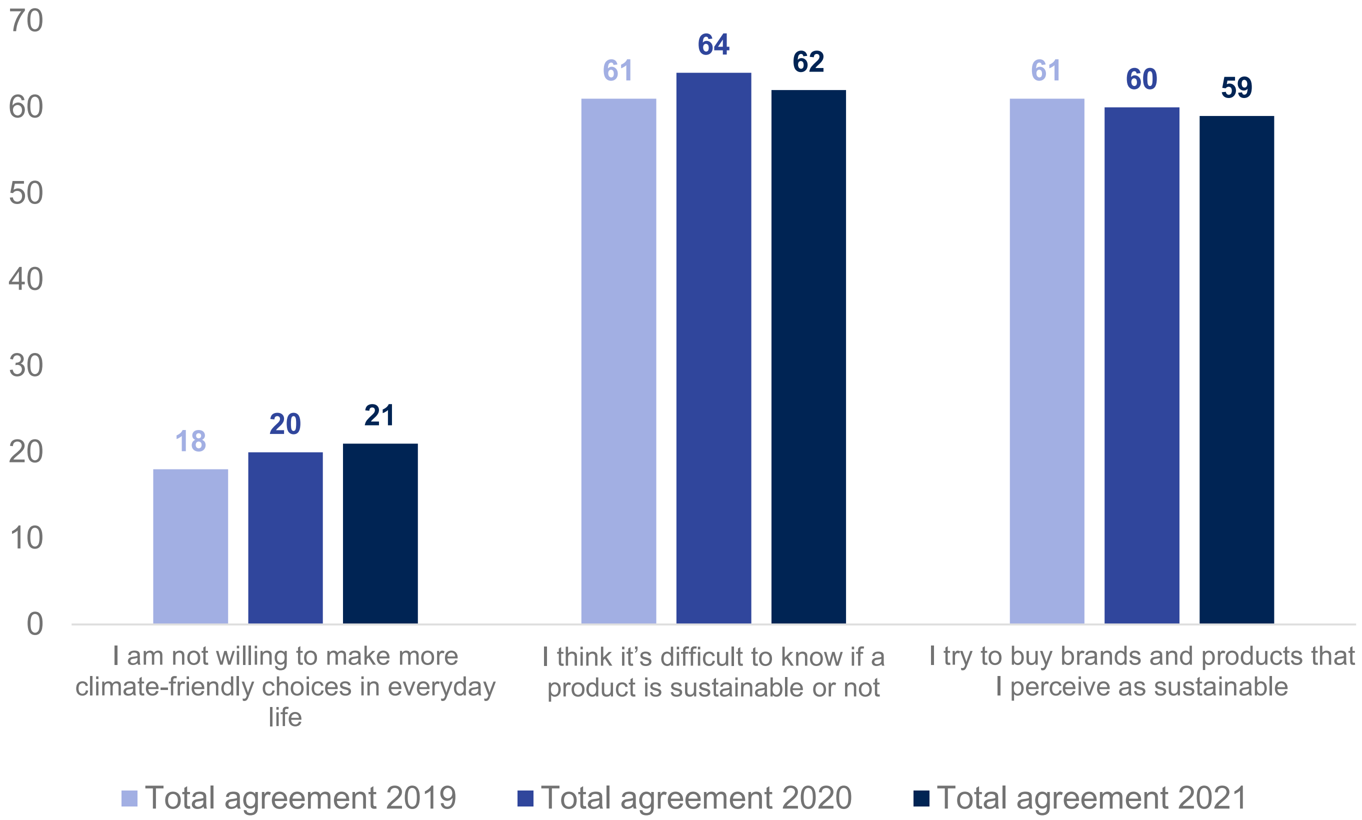
- More than half of the population care about which company is making the products they buy. But this also has had a significant negative development over the last few years.

- Only 22% respond they agree to the statement saying that there is no major climate crisis. This has been the most stable of the three statements.



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

LESS PEOPLE ARE WILLING TO MAKE CLIMATE FRIENDLY CHOICES, NOT KNOWING WHICH PRODUCTS TO GET SEEMS TO BE PARTLY AT FAULT



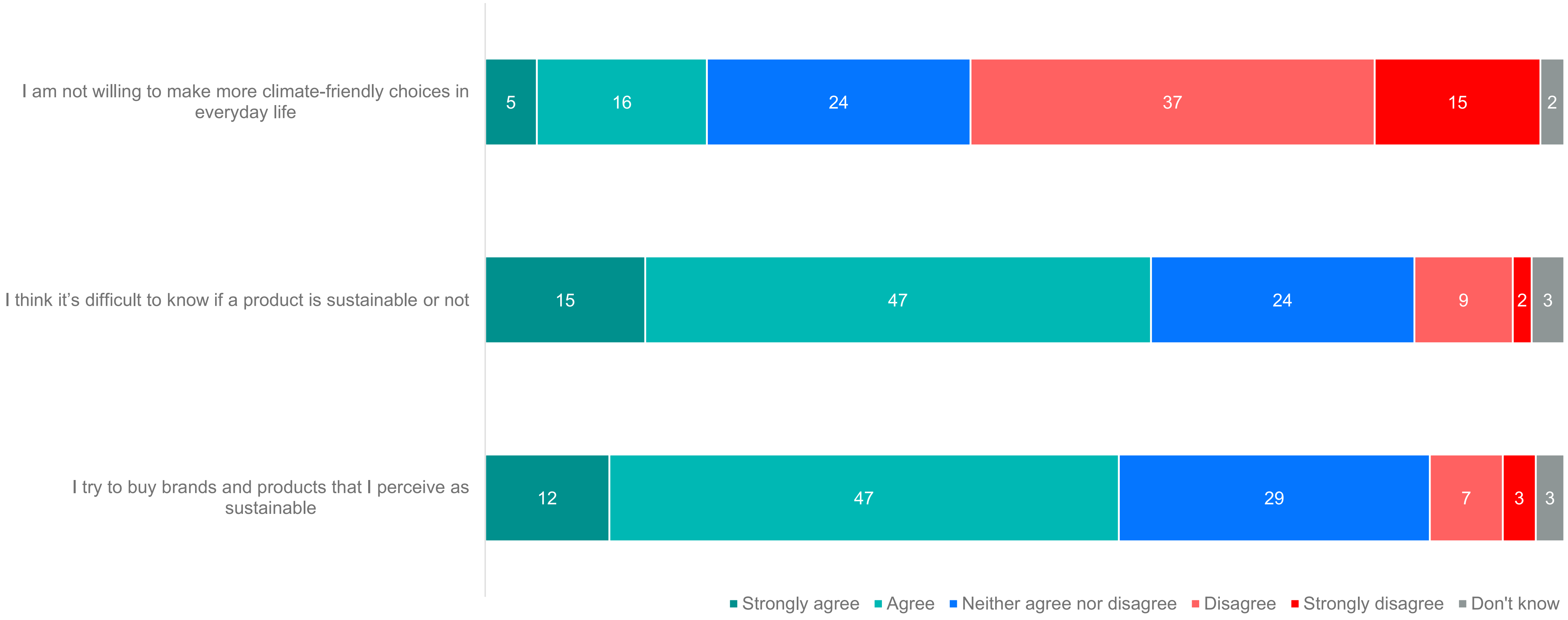
Base: All, N=7000 (1000 pr. country)

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

- Unfortunately, we see a continued growth for people who are not willing to make more climate friendly choices in their everyday life. With the number moving from 18% to 21%

- There are a lot of respondents (62%) who also this year say it is hard to know whether a product is sustainable or not. Clearly more can be done to get more information out to consumers about sustainable alternatives.

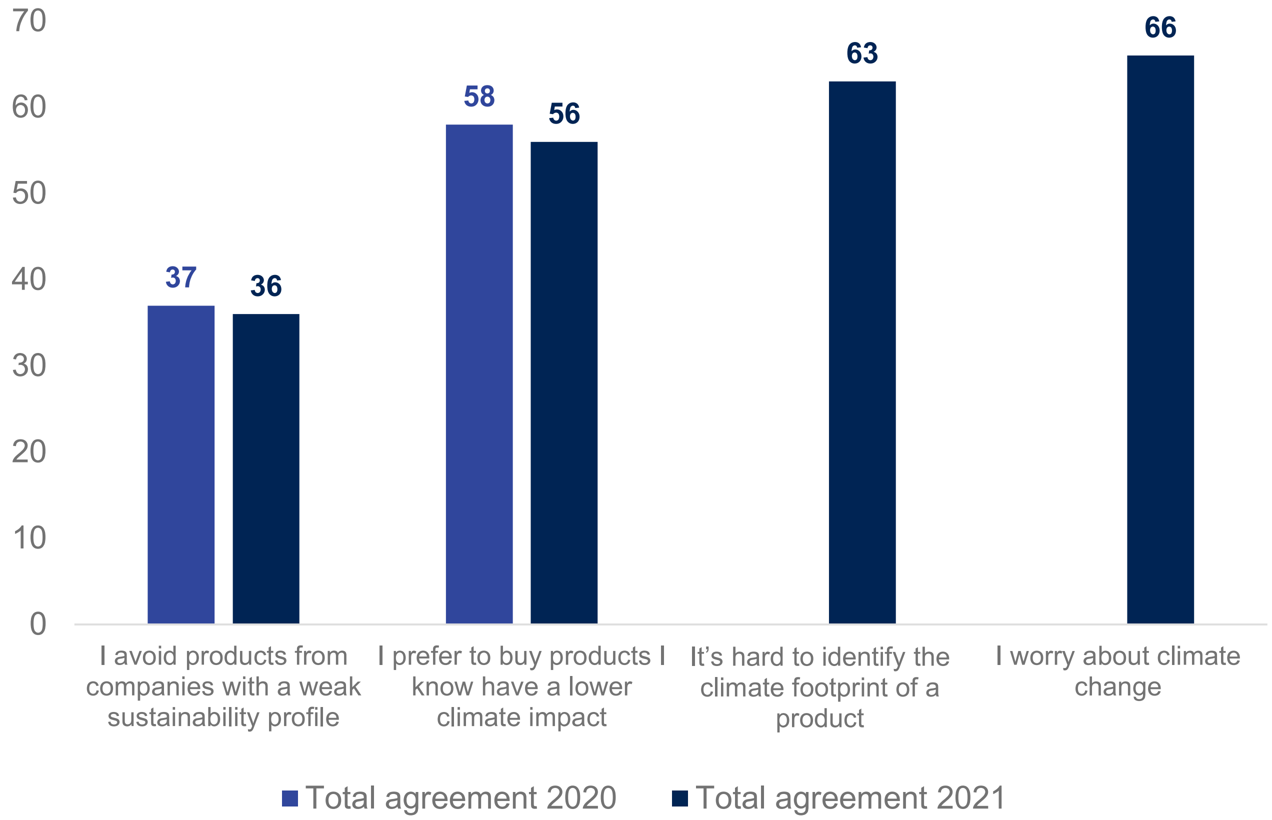
- And almost as many (59%) say they try to buy sustainable, so the willingness is there. This group has seen a slight decrease though.



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

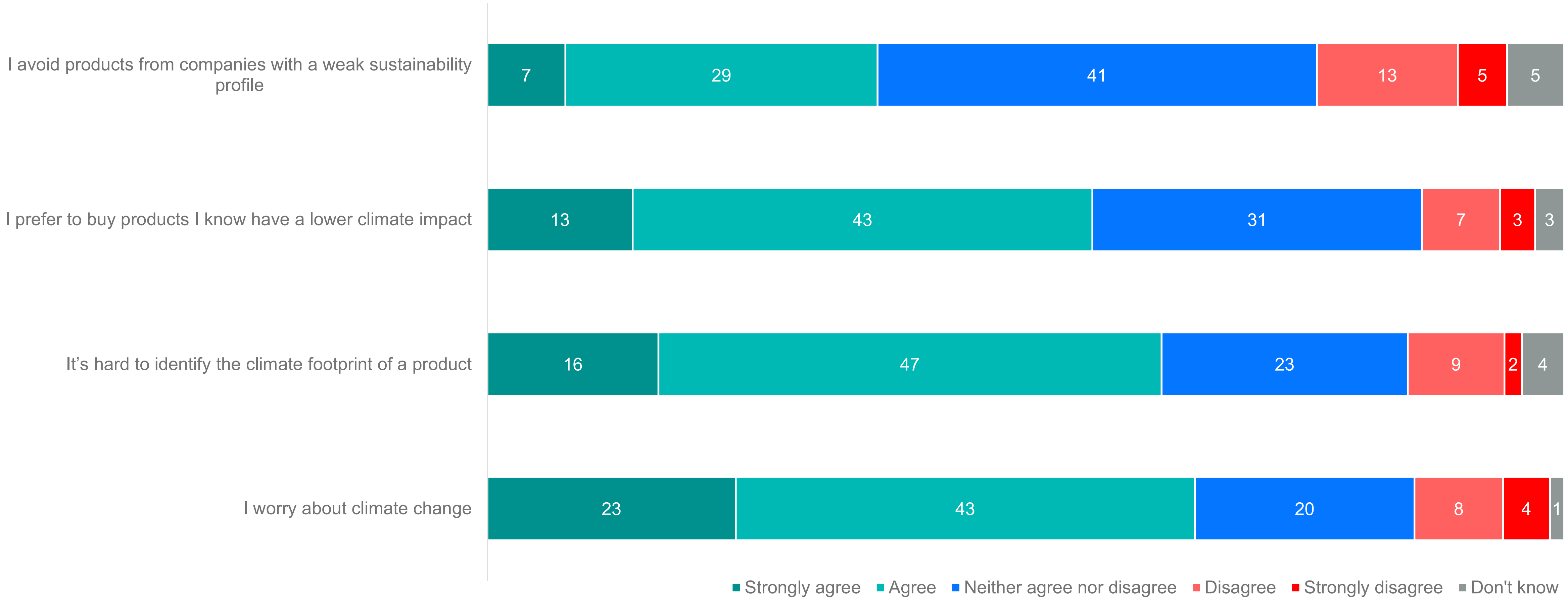
Q1.2 To what extent do you agree or disagree to these statements?

THE MAJORITY WORRY ABOUT CLIMATE CHANGE, AND WILL PREFER TO GET CLIMATE FRIENDLY PRODUCTS OVER LESSER SUSTAINABLE CHOICES



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

- For the newer statements we see that 36% tell us that they avoid products from companies with a weak sustainability profile. This is ever so slightly lower that in 2020.
- But there is an even bigger decrease (2 pp) in people who prefer to buy products they know have a lower climate impact. Now this is not a dramatic change, but not the kind of development we would like to see.
- In 2021 we have added two more statements which both rank quite high. Firstly, we have identified that 63% agree that it is hard to identify the climate footprint of a product. Secondly 66% worry about climate change, the single highest agreement value of all the statements.

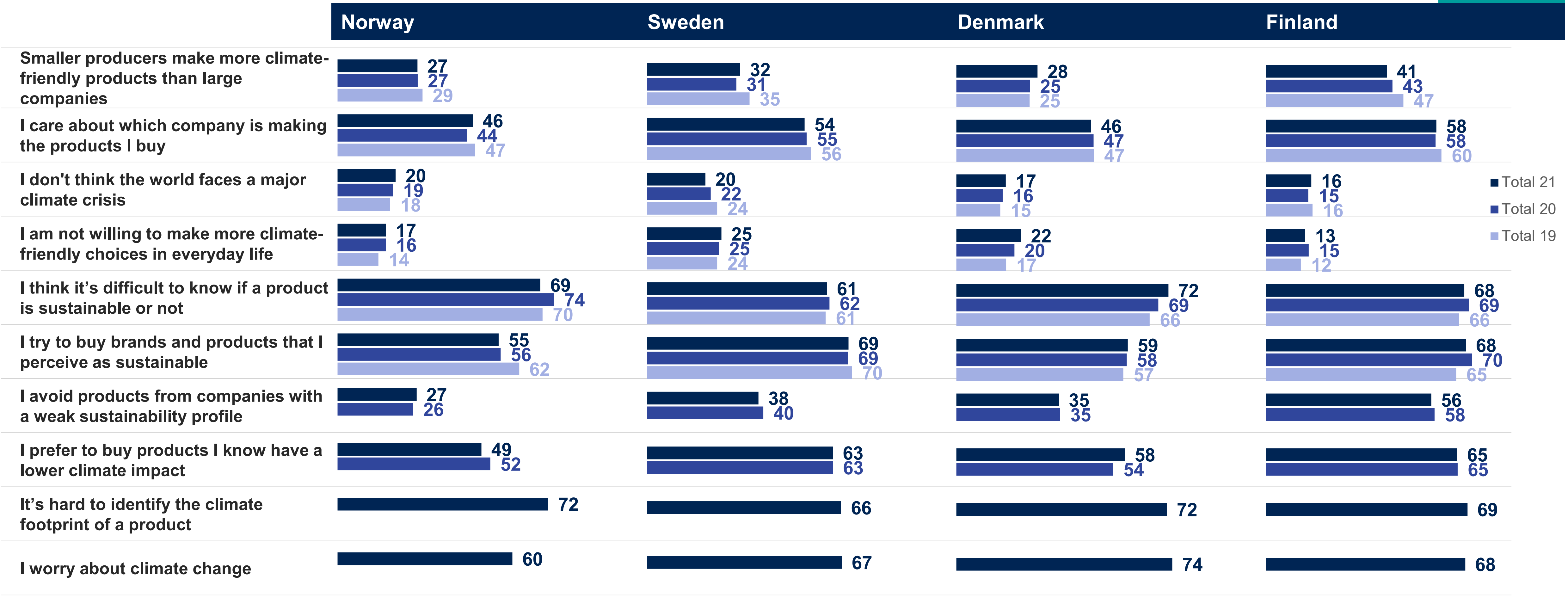


Base: All, N=7000 (1000 pr. country)
Q1.2 To what extent do you agree or disagree to these statements?

THE NORDICS

Norway and Denmark comes in highest of all the countries saying its hard to identify the climate footprint of a product. Climate change seems to worry the Danes the most, and the Norwegians the least.

TOP 2



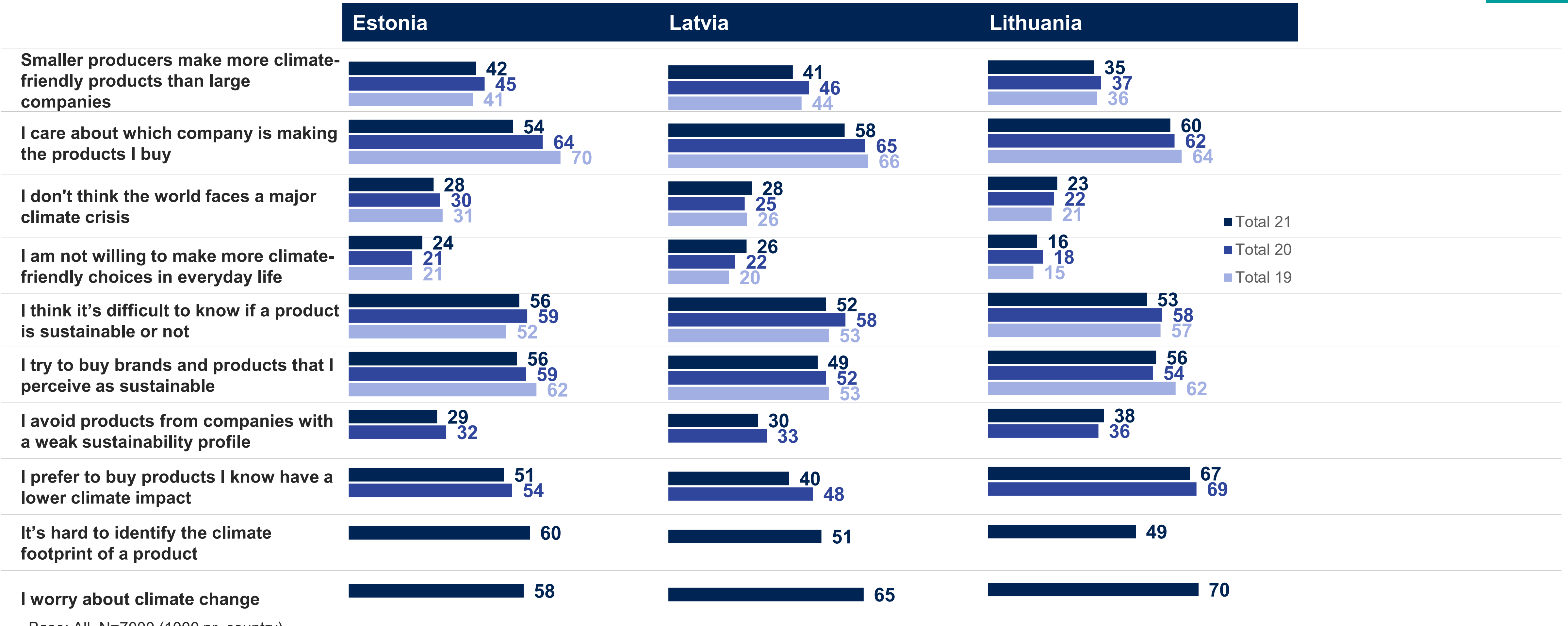
Base: All, N=7000 (1000 pr. country)

Q1_2. To what extent do you agree or disagree to these statements?:

THE BALTICS

Estonia has a negative trend in caring about which company makes the product one buys. They also rank highest amongst the Baltics in how hard it seems to be to identify the climate footprint of a product.

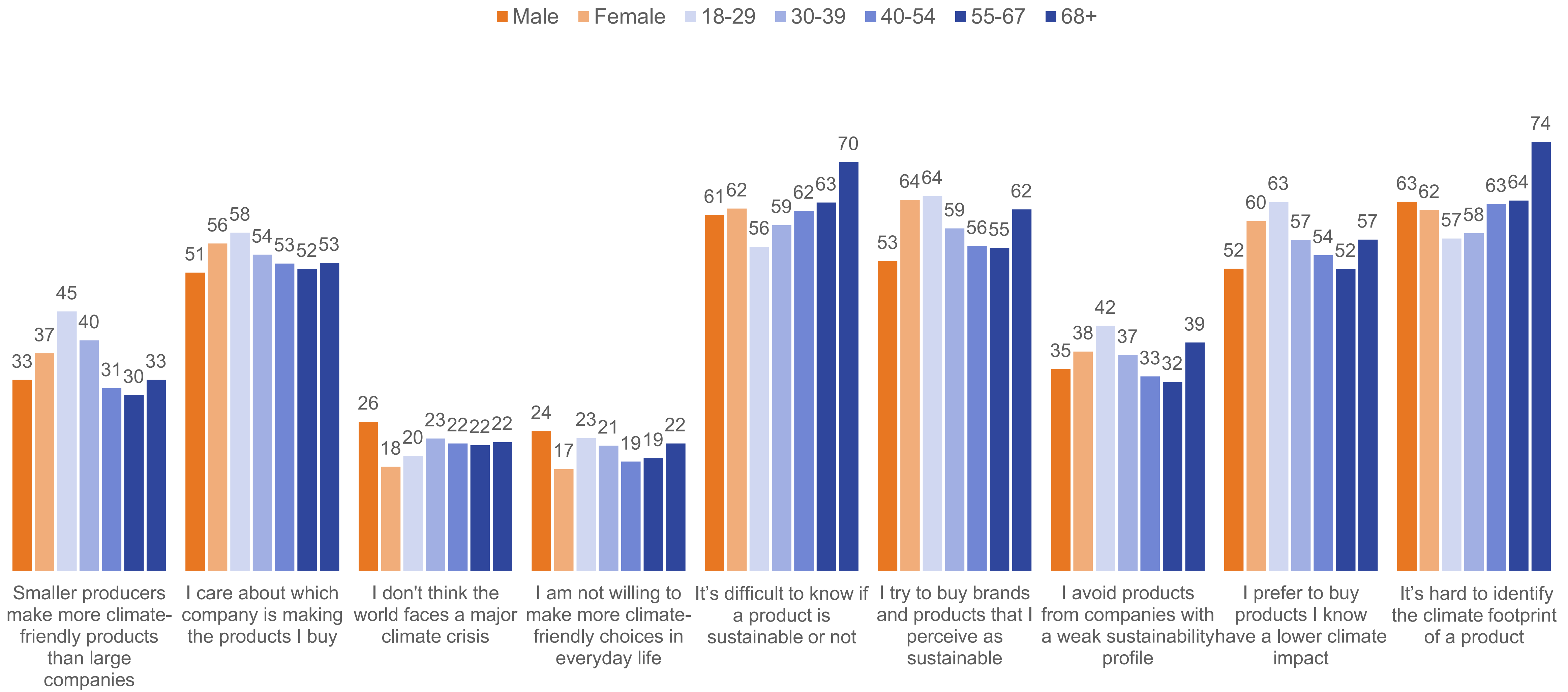
TOP 2



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

Q1_2. To what extent do you agree or disagree to these statements?:

DEMOGRAPHIC BREAKOWN



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

Q1_2. To what extent do you agree or disagree to these statements?

BEHAVIOUR AND CLIMATE TOPICS

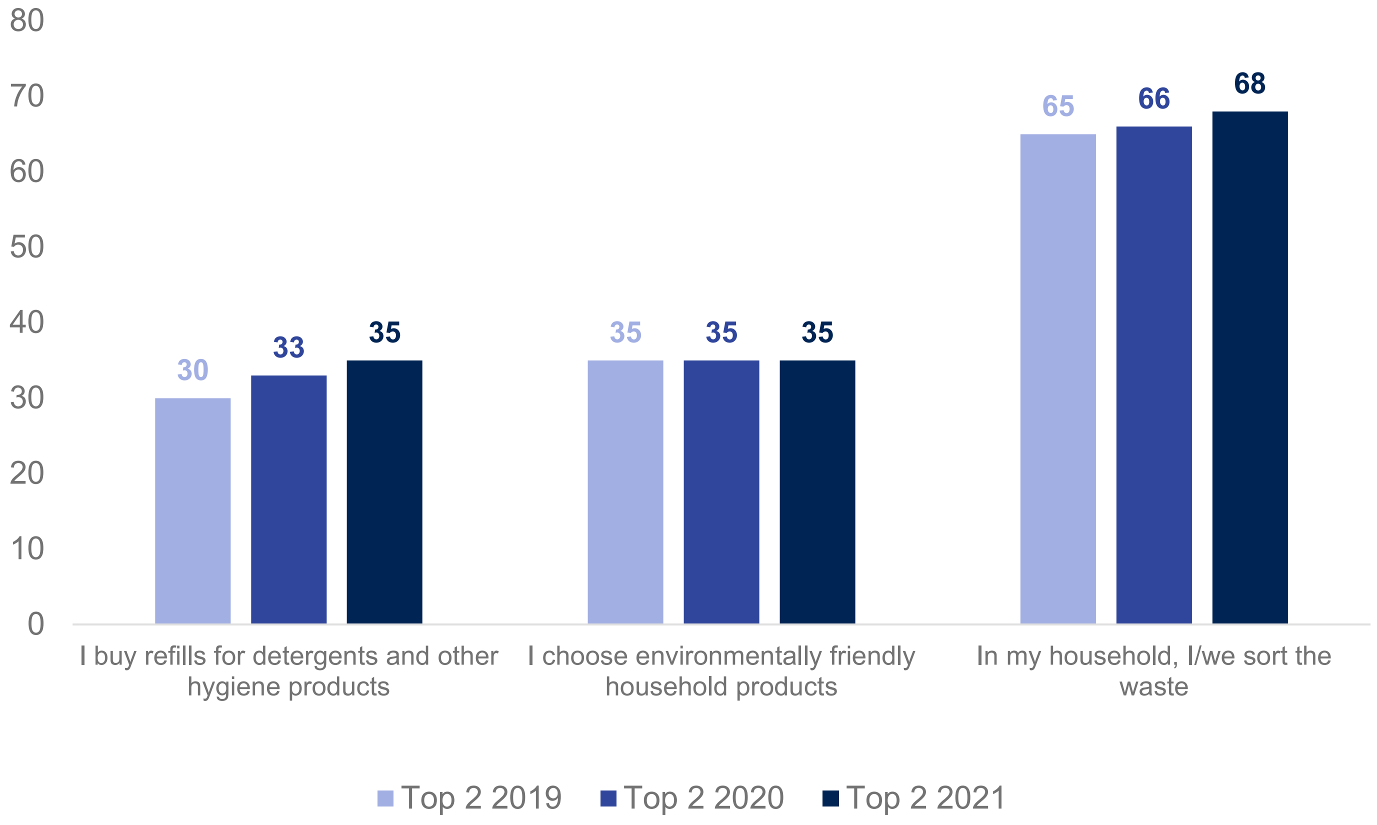
3

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

- I buy refills for detergents and other hygiene products
- I choose environmentally friendly household products such as detergents, washing liquids, soaps
- 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
- I avoid products with plastic packaging
- I buy certified organic products
- I try to reduce my food waste
- I actively choose brands with a clear sustainability profile (2021)
- I try to buy locally produced food (2021)

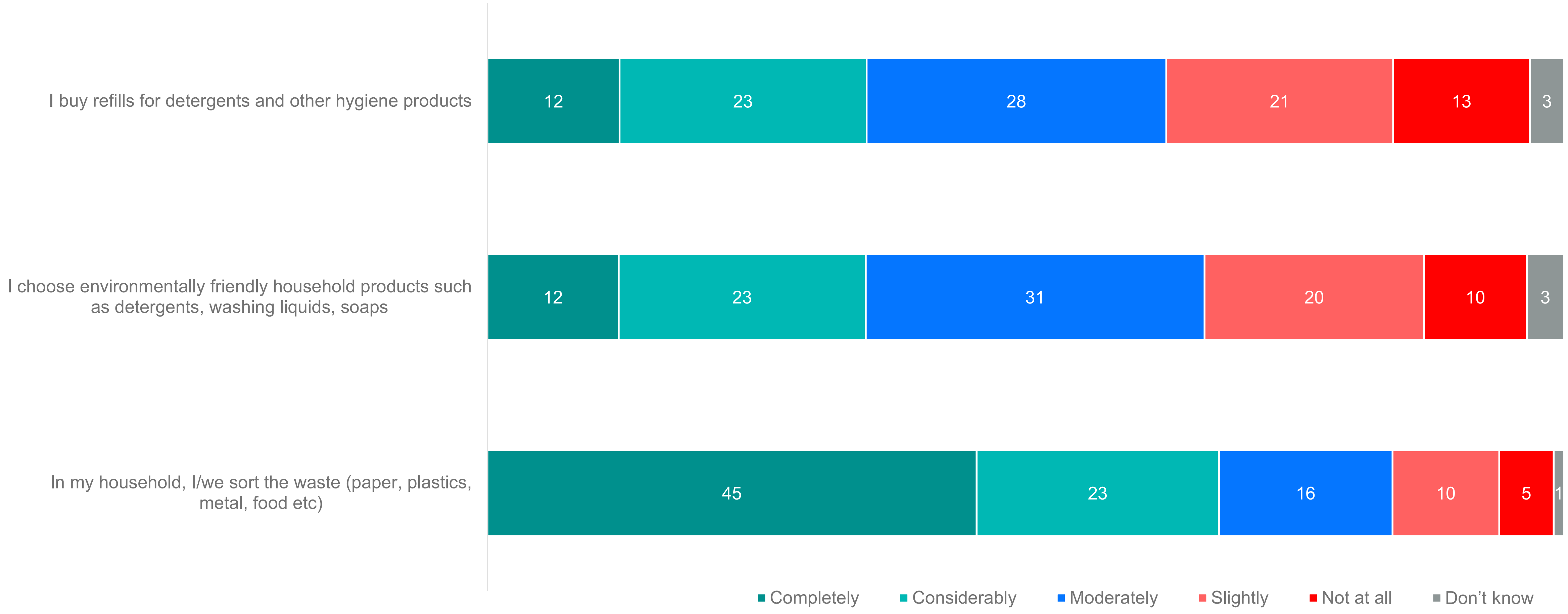
Scale 1-5

FURTHER INCREASE IN CONSUMERS AIMING FOR REFILL PRODUCTS AND SORTING WASTE



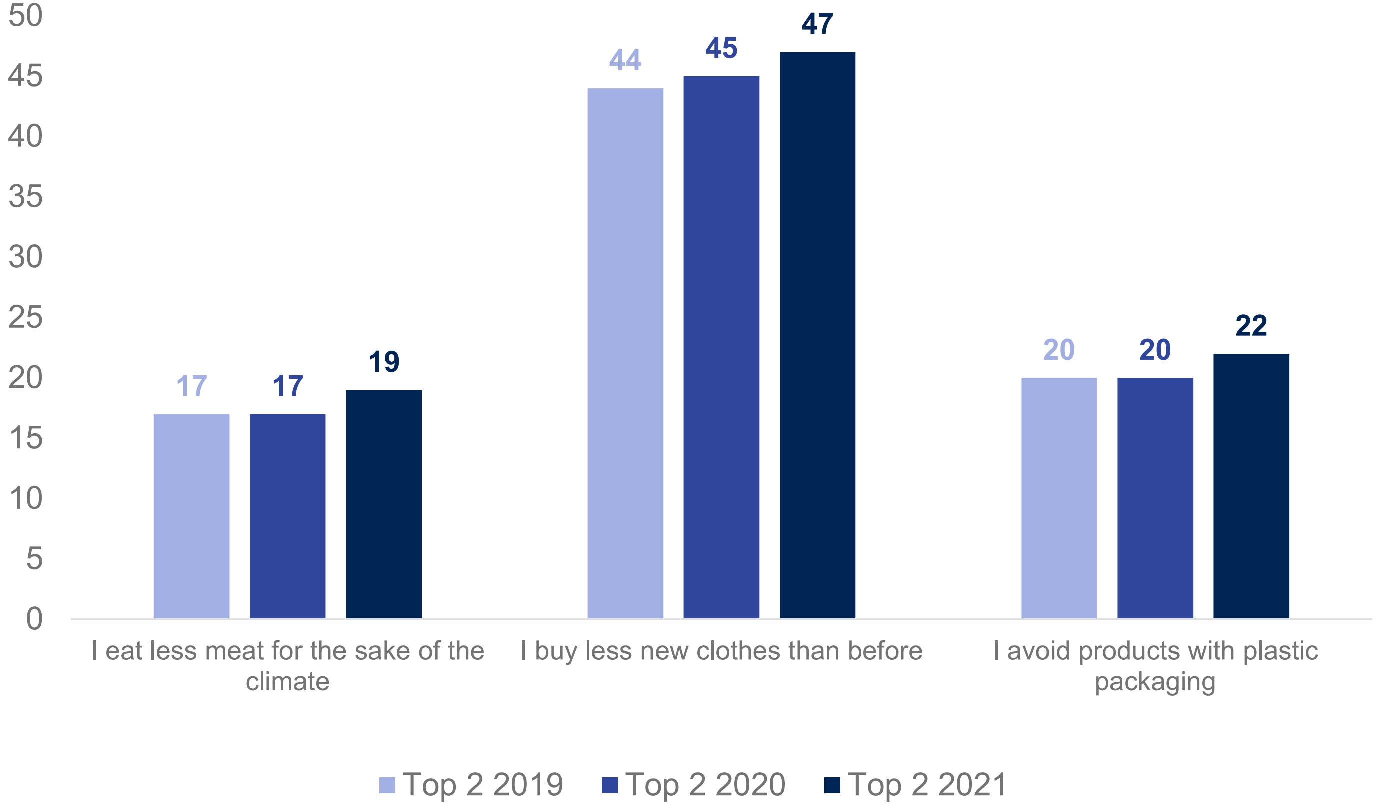
- 35% this year say they buy refill products in the detergent and hygiene product categories. Another significant increase YoY.
- The share agreeing to the statement that the household chooses environmentally friendly products is as flat as a pancake still. Let's hope for some progress here the next year as this level is still quite low.
- Most people are getting better at sorting their waste. We see a significant jump this year resulting in a 68% share total. We know that every climate friendly activity counts and often lead to other important ones, so this is a great step in the right direction.

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



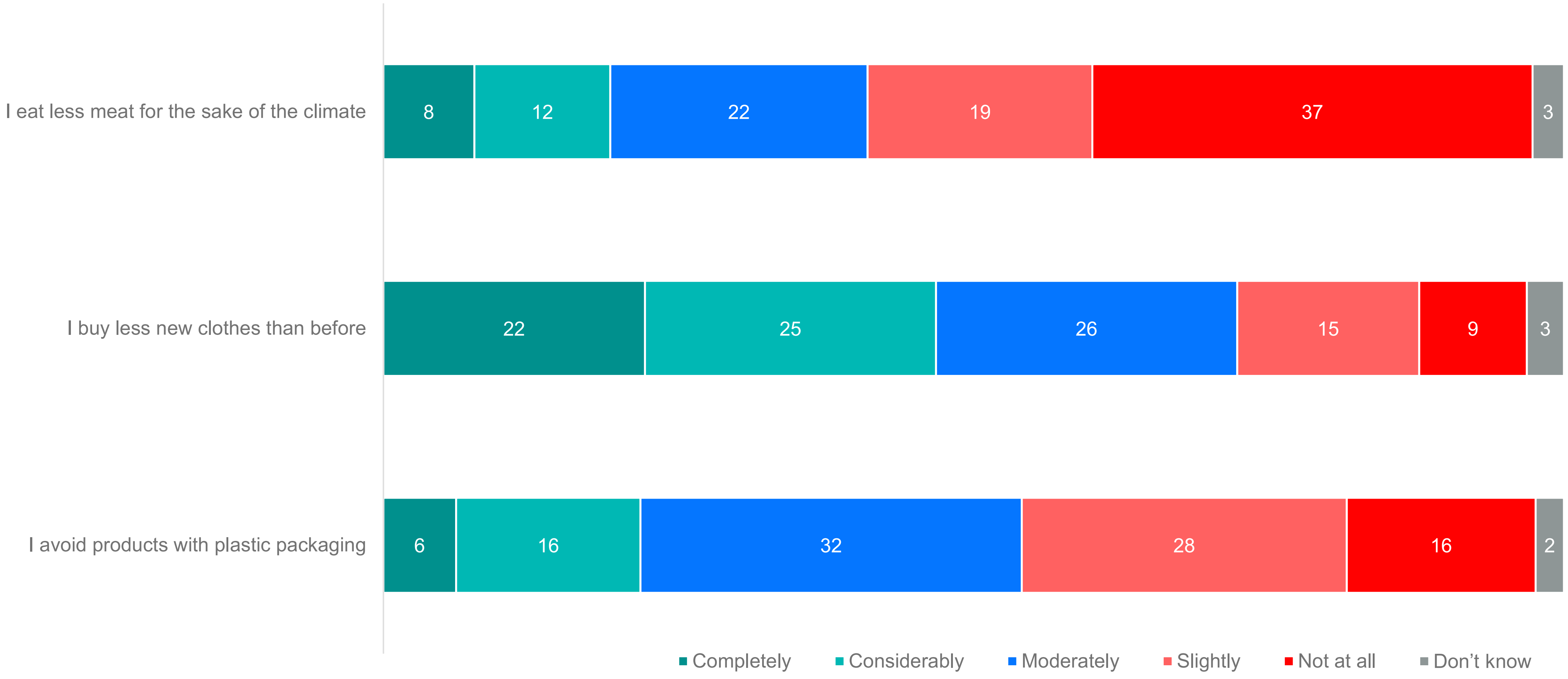
Base: All, N=7000 (1000 pr. country)
Q2.3 To what extent do you feel the statements below reflects your own behavior?

SIGNIFICANT JUMPS FOR ALL THREE STATEMENTS IN 2021



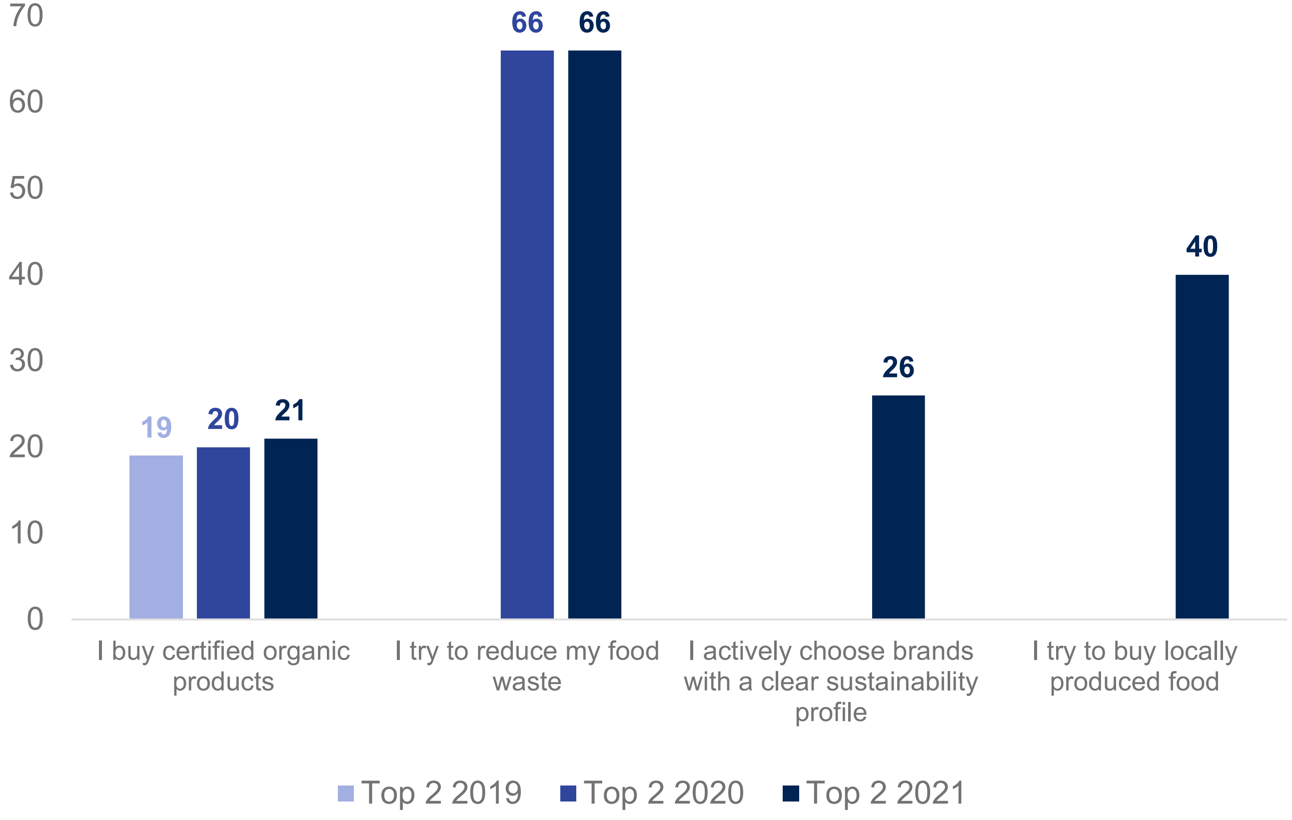
- There is an increase in people who agree that they eat less meat for the sake of the climate. Going from 17% to 19%.
- 47% state that they buy less new clothes than before. This is also a significant jump from the prior years.
- There is a quite small group who actively try to avoid plastic products. In today's world this seems to be a struggle, and therefore we might see more regulation in a direction that forces this upon consumers. On the bright side there is a significant boost from 20% to 22% this year.

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



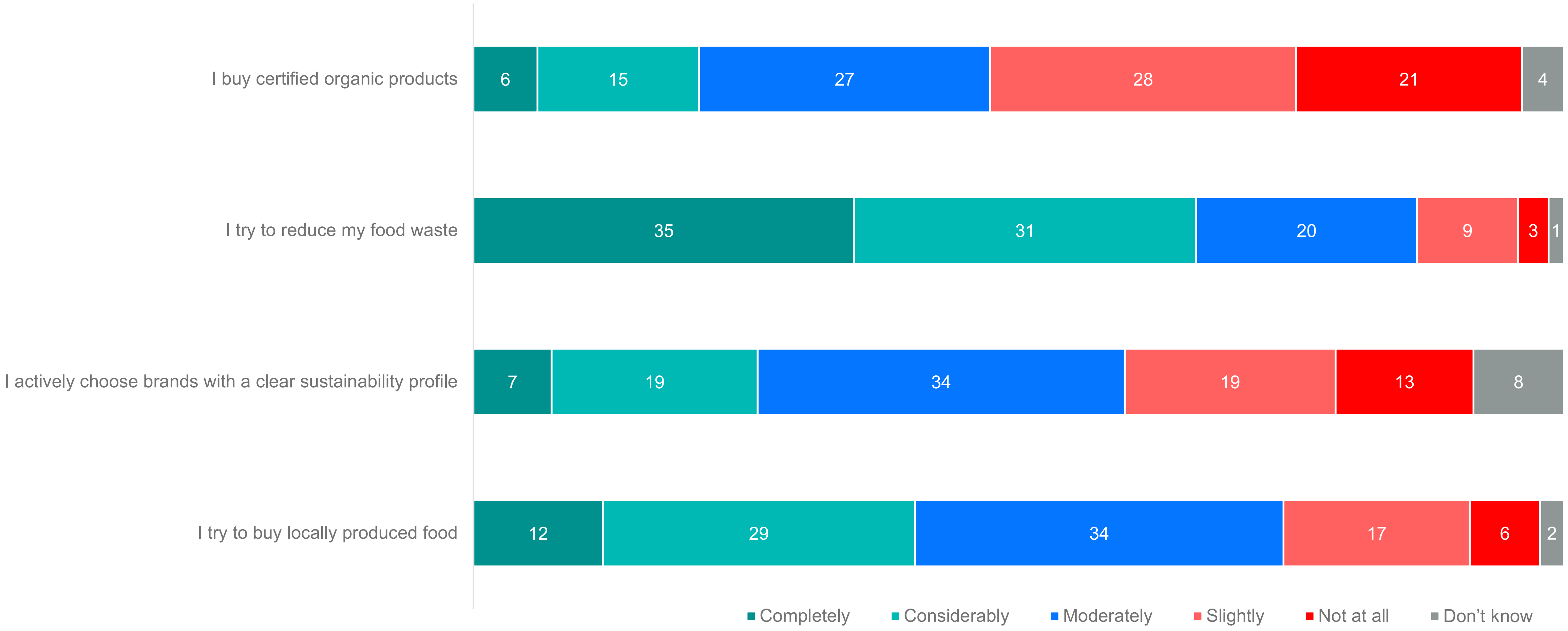
Base: All, N=7000 (1000 pr. country)
Q2.3 To what extent do you feel the statements below reflects your own behavior?

CERTIFIED ORGANIC PRODUCTS SEE ANOTHER INCREASE, LOCALLY PRODUCED FOODS AND CLEAR SUSTAINABILITY PROFILES NEW



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

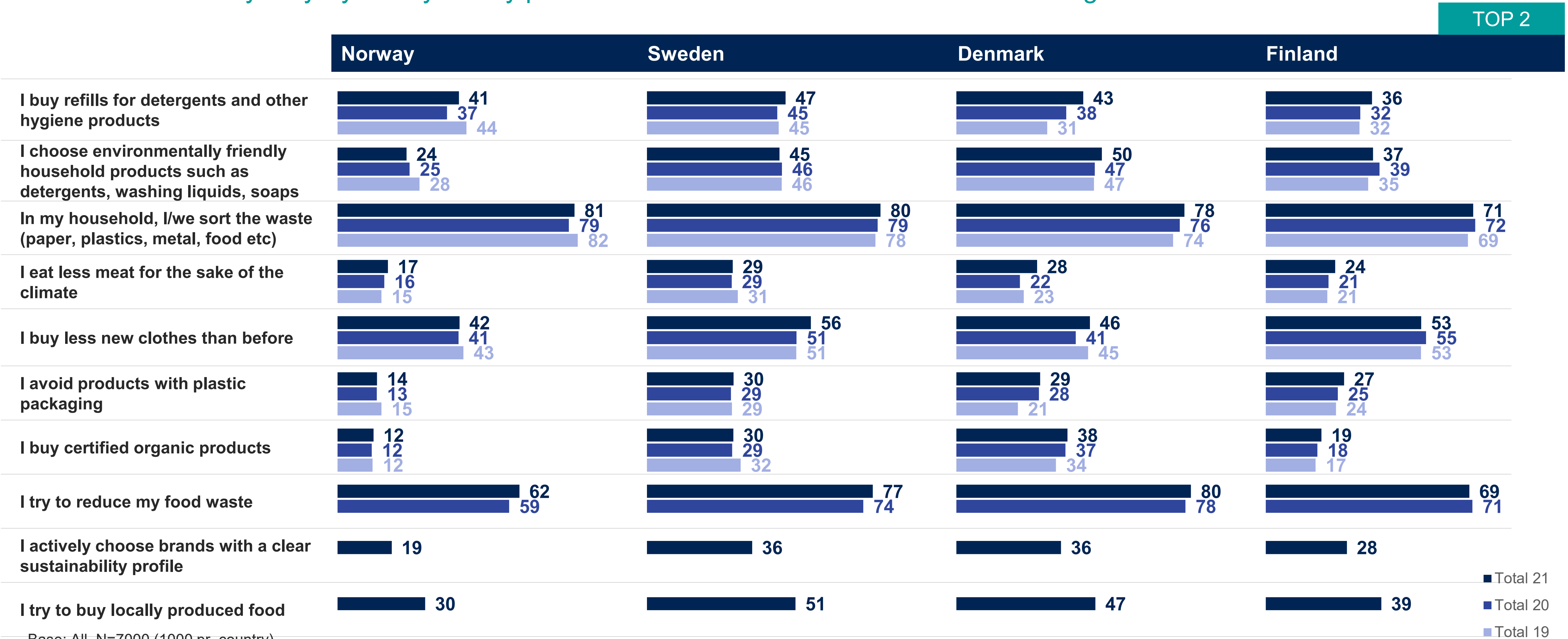
- 21% share that they buy certified organic products. This is a continued growth from 2019.
- Most consumers try to reduce food waste. This number is unchanged from last year, but the share alone is something to note.
- 26% agree that they actively choose brands with a clear sustainability profile. This is not a very high share, but it beats out organic indicating an importance for a wider crowd.
- 40% try to buy locally produced food. Again, not a high number, but in the light of the neighboring number on this slide this seems to be somewhat more significant.



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

THE NORDICS

Amongst the Nordics, Norway has the fewest agreeing that they actively choose brands with a clear sustainability profile, and the least that say they try to buy locally produced food. Sweden heads both these categories.



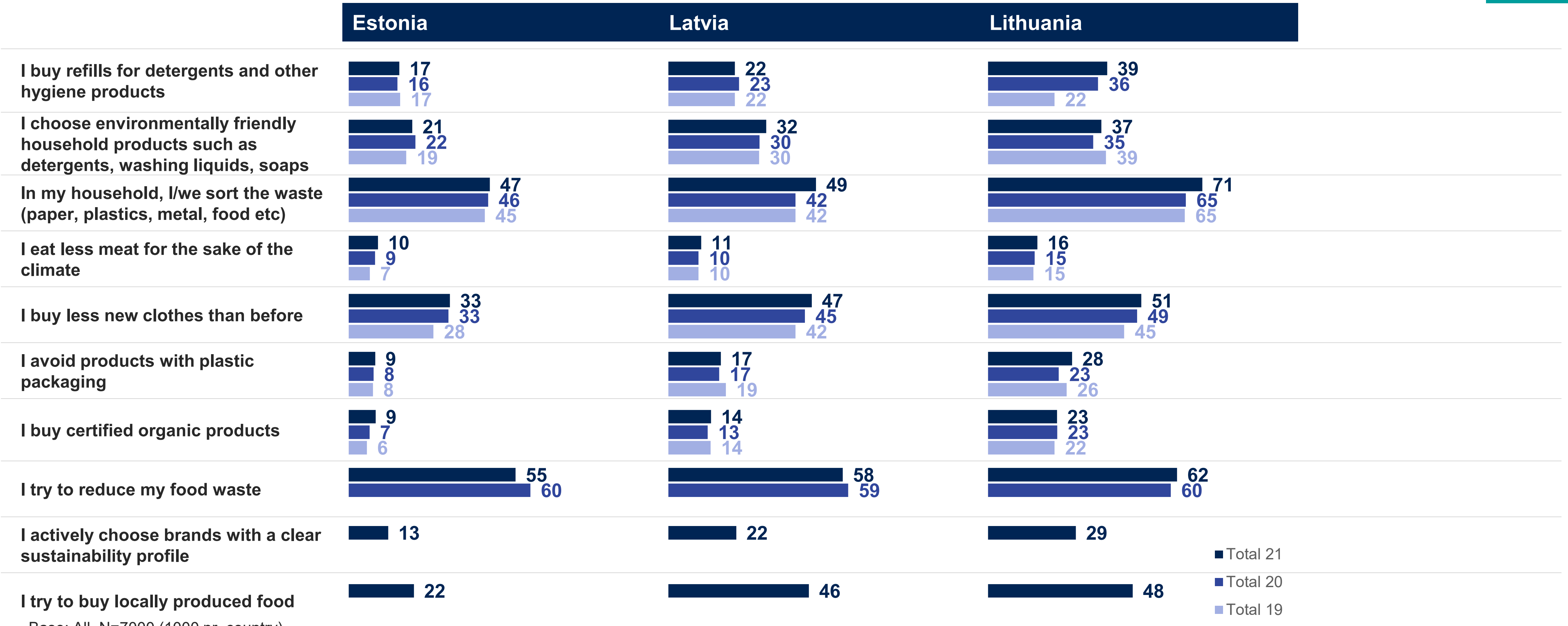
Base: All, N=7000 (1000 pr. country)

Q2_3. To what extent do you feel the statements below reflects your own behaviour?

THE BALTICS

In the Baltics Lithuania seems to lead the way on the two newly added statements regarding choosing sustainable brands and buying locally produced food. Estonia takes the opposite position.

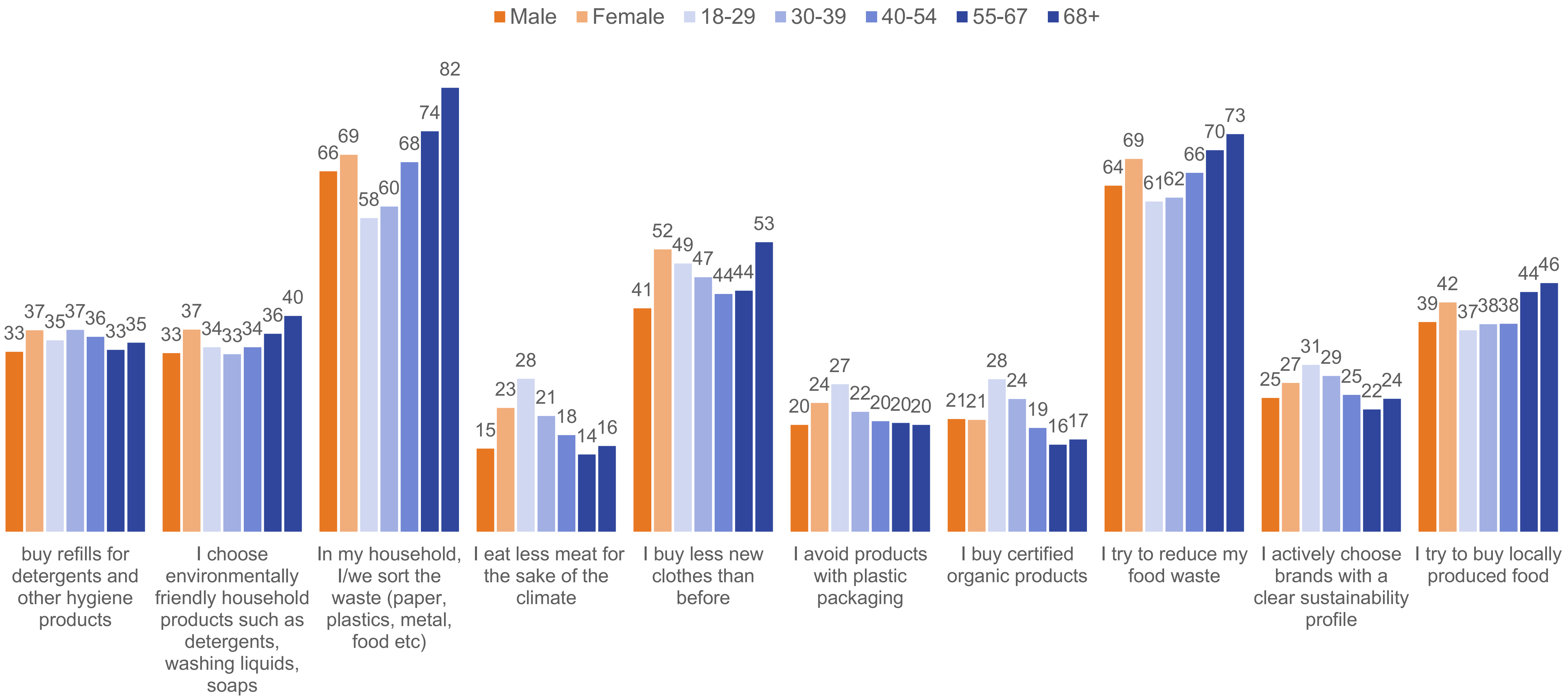
TOP 2



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

Q2_3. To what extent do you feel the statements below reflects your own behaviour?:

DEMOGRAPHIC BREAKOWN



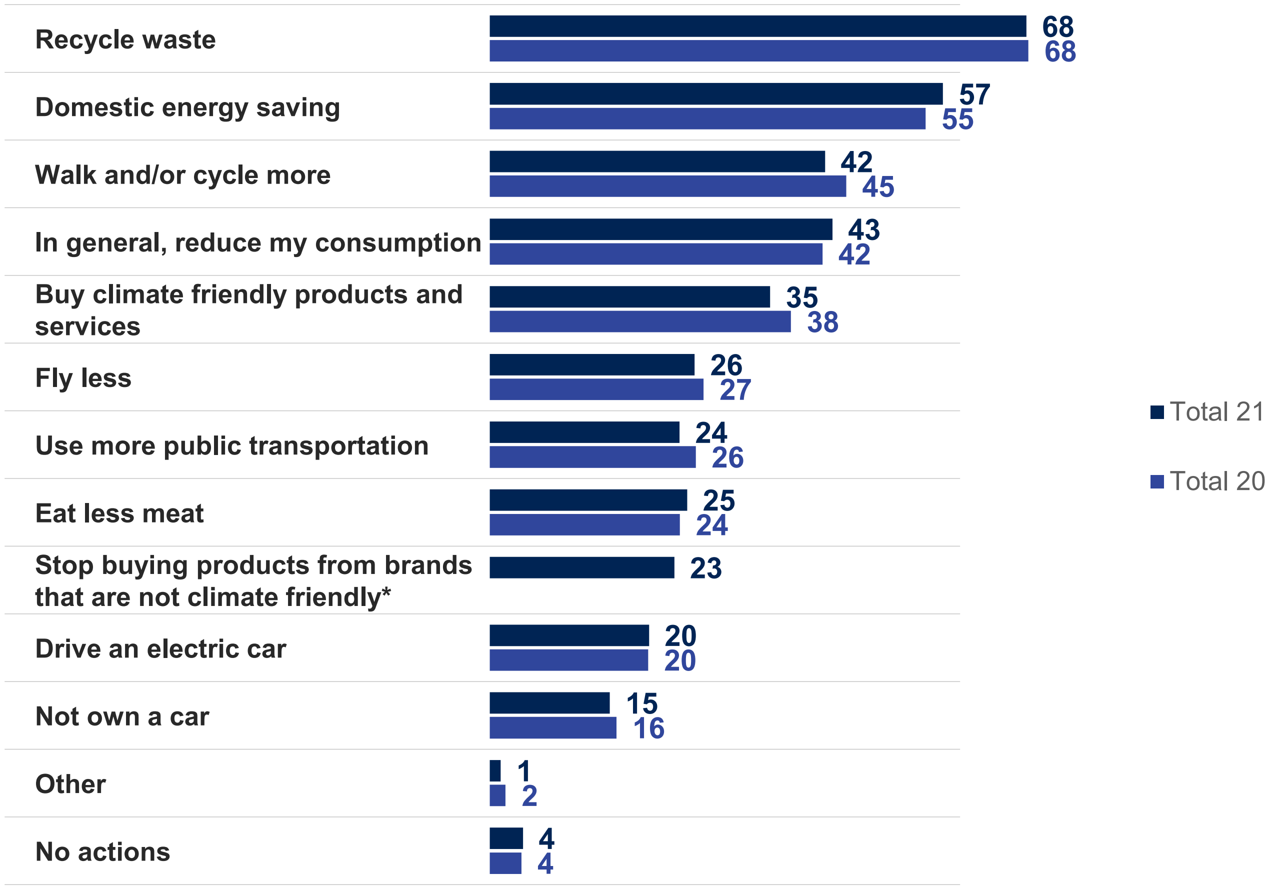
Base: All, N=7000 (1000 pr. country)

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

What personal actions are you willing to do to reduce your climate emissions in your daily life?

- Recycle waste
- Domestic energy saving
- Walk and/or cycle more
- In general, reduce my consumption
- Buy climate friendly products and services
- Fly less
- Use more public transportation
- Eat less meat
- Stop buying products from brands that are not climate friendly (2021)
- Drive an electric car
- Not own a car

IN A NEWLY ADDED ALTERNATIVE, 23% SAY THEY ARE WILLING TO STOP BUYING PRODUTS FROM BRANDS THAT ARE NOT CLIMATE FRIENDLY



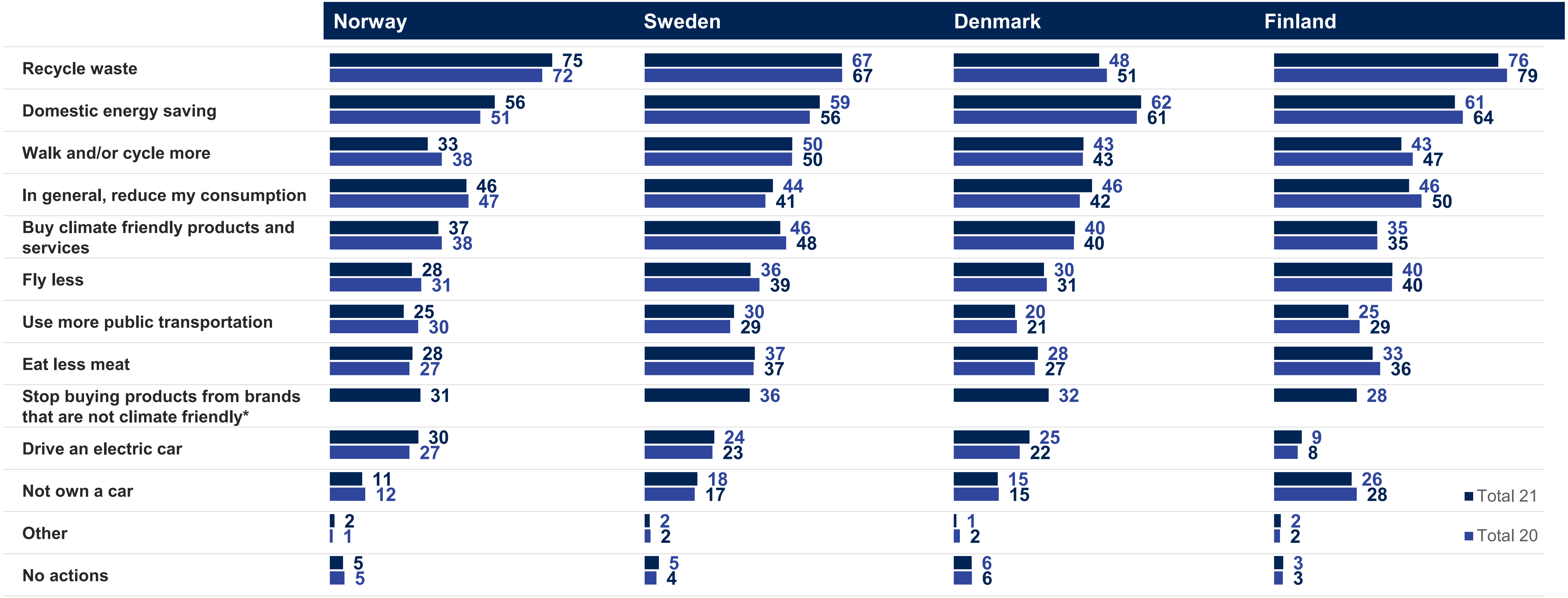
- This year we have added a new alternative to see if people are willing to stop buying products from brands that are not climate friendly. 23% agree to that statement, putting it right behind those who are willing to eat less meat.
- Recycling waste is the action that most people seem to agree to be willing to do to reduce climate emissions in their daily life.
- Domestic energy savings have moved up 2pp in 2021, obviously climate change is not the only driver for such actions, but the trend is still very much an important contribution.
- We see a 3pp drop for the category walk/cycle more. This could be due to new travelling patterns changed by the pandemic.

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

Q2_4. What personal actions are you willing to do to reduce your climate emissions in your daily life?

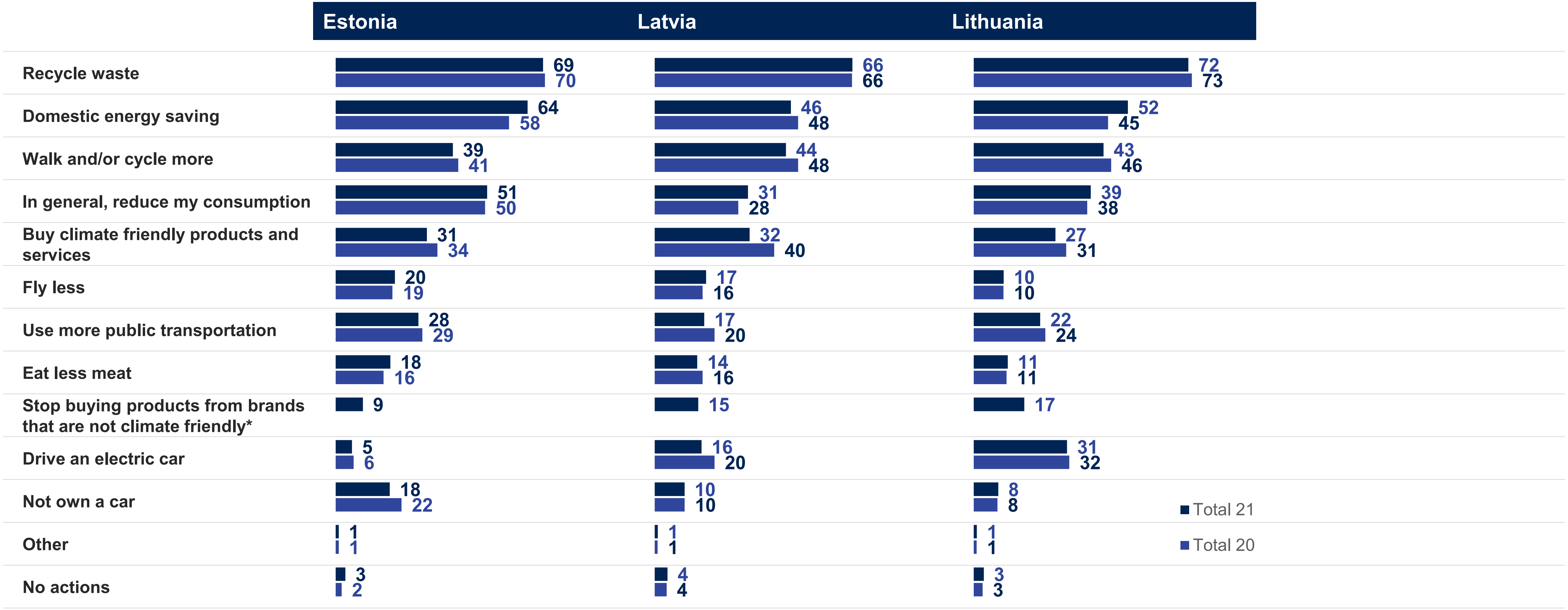
THE NORDICS

Finland and Norway seems to be the most willing countries to recycle waste. Sweden is where most people (36%) are willing to stop buying products from brands who are not climate friendly.



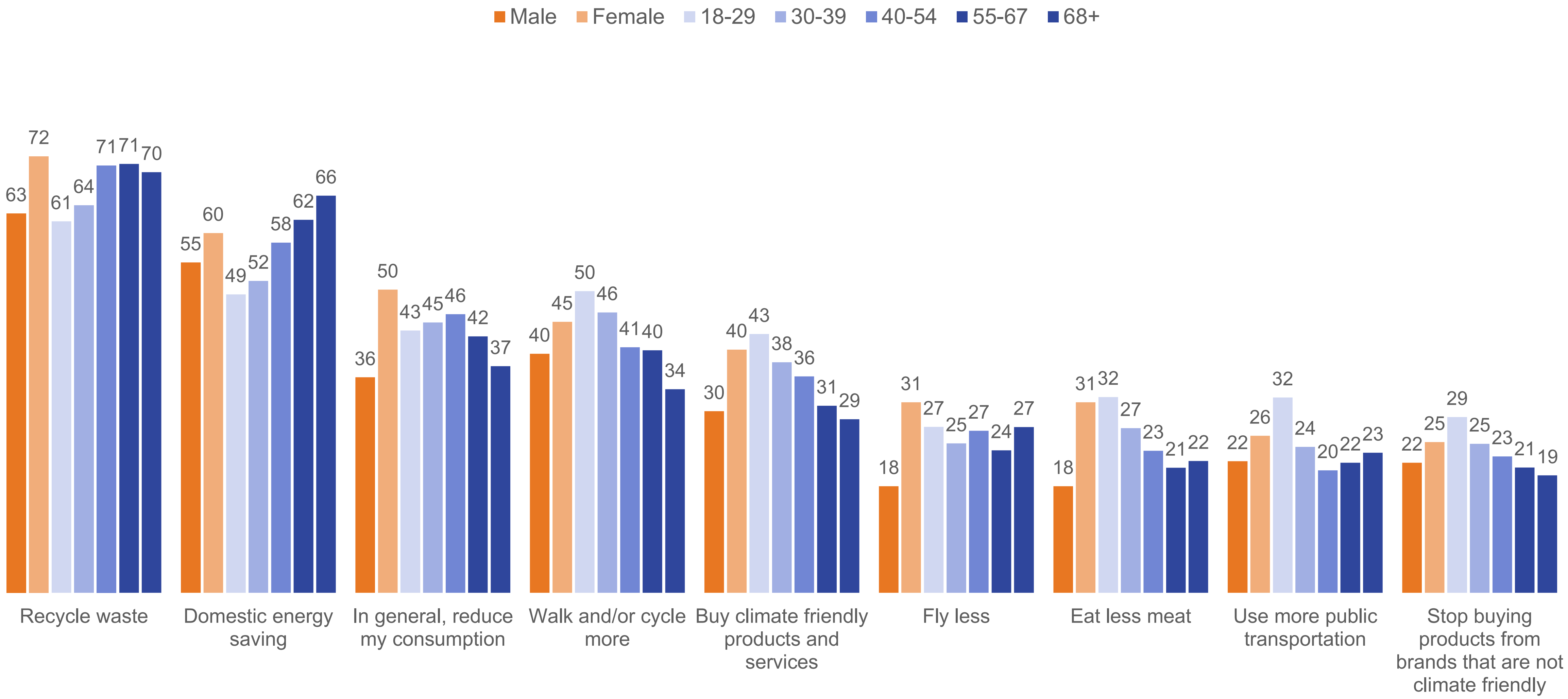
Base: All, N=7000 (1000 pr. country)
Q2_4. What personal actions are you willing to do to reduce your climate emissions in your daily life?

Estonia and Lithuania see big jumps for “domestic energy saving”. Estonia the country with the least amount of willingness (9%) to stop buying products from brands that are not climate friendly.



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?

DEMOGRAPHIC BREAKOWN



Base: All, N=7000 (1000 pr. country)
Q2_4. What personal actions are you willing to do to reduce your climate emissions in your daily life?

Figure 1 What consumers say vs. what they do

Source: Sustainable packaging in Europe report by DS Smith & Ipsos MORI, March 2021. https://blog.dssmith.com/sustainable-packaging-covid19 - Base: All UK, DE, PL, IT, FR, ES (1000), BE, NL, SE, DK, FI, PT (500)

PACKAGING

4

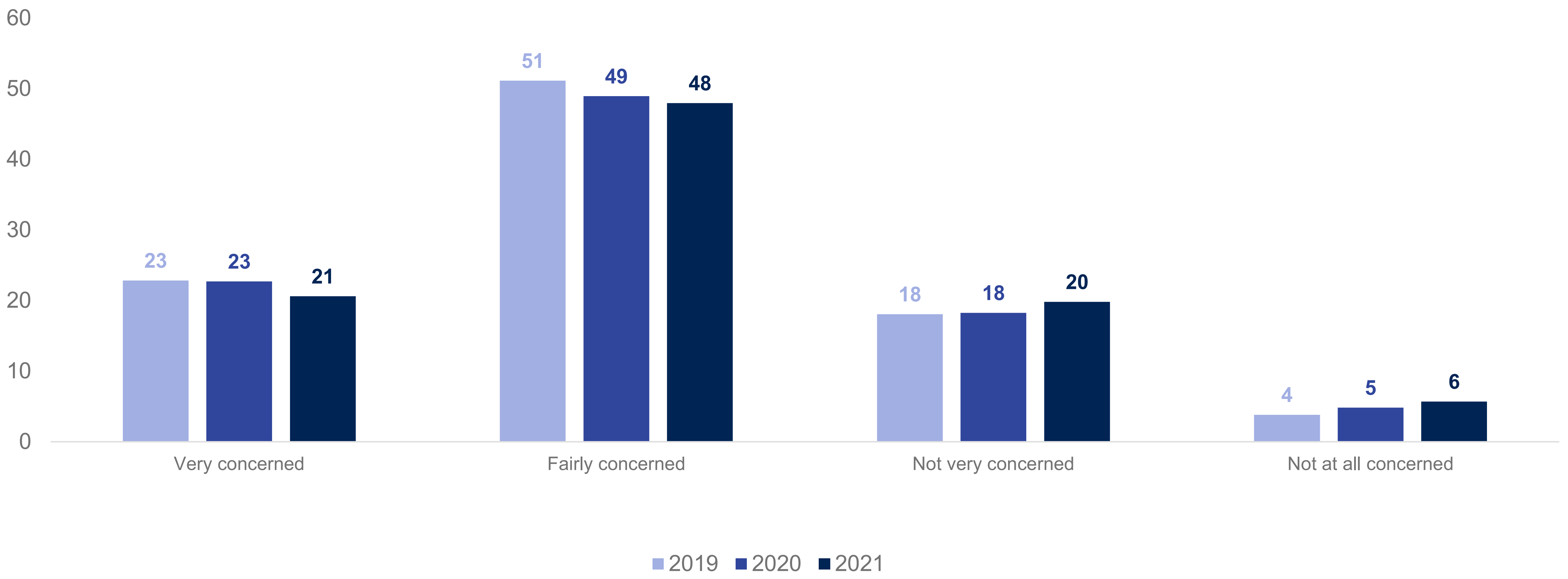
Recently, there have been discussions about the environmental consequences of plastic packaging not made from recycled materials or that is not recycled after use.

How concerned, if at all, would you say you are about this topic?

Scale 1-4

ENVIROMENTAL CONCERN DROPPING

The total concern for environmental consequences of plastic packaging has dropped significantly the last year. Down 2pp for the most concerned respondents, plus another percentage point for the fairly concerned.

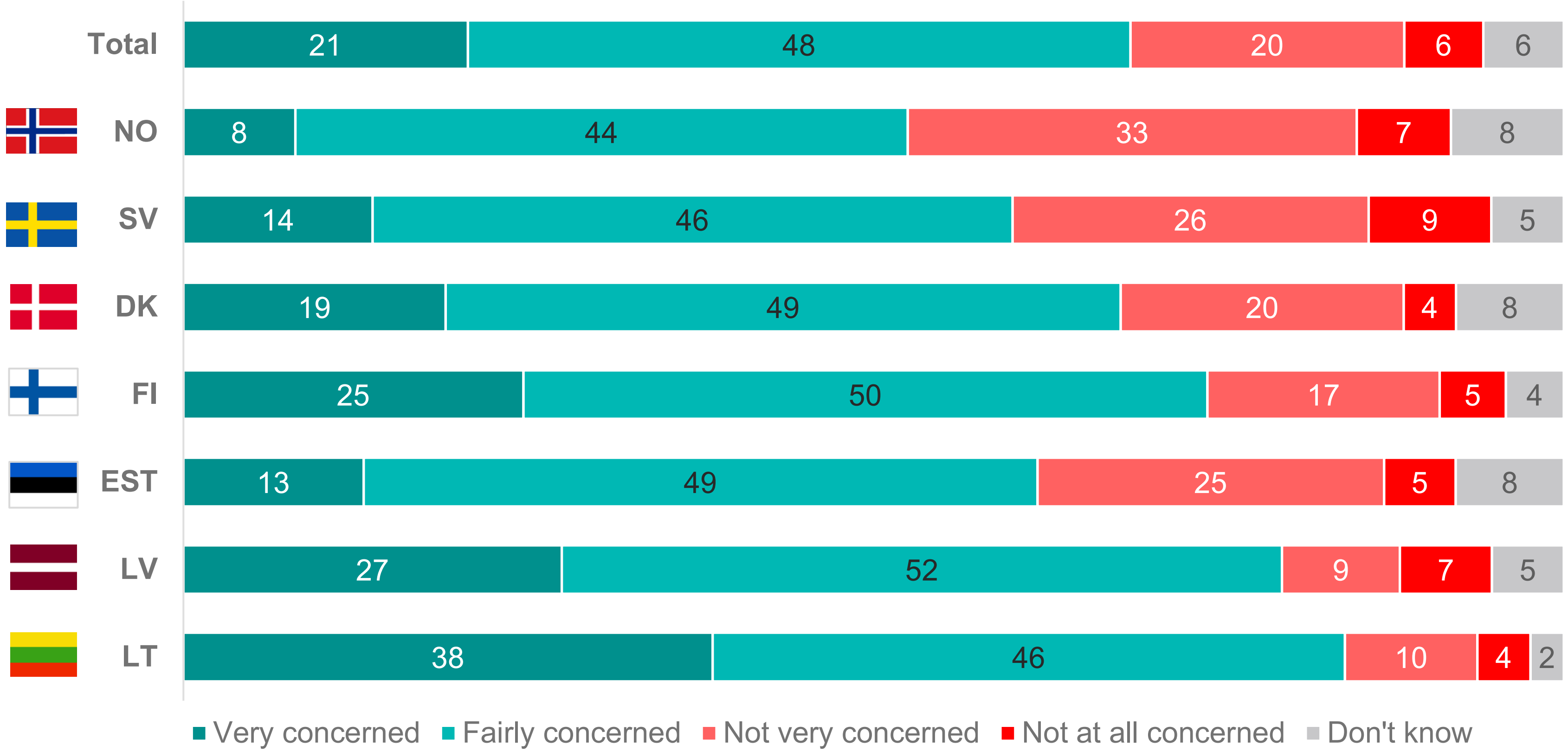


Base: All, N=7000 (1000 pr. country)

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?

NORWAY LEAST CONCERNED, LITHUANIA MOST CONCERNED.

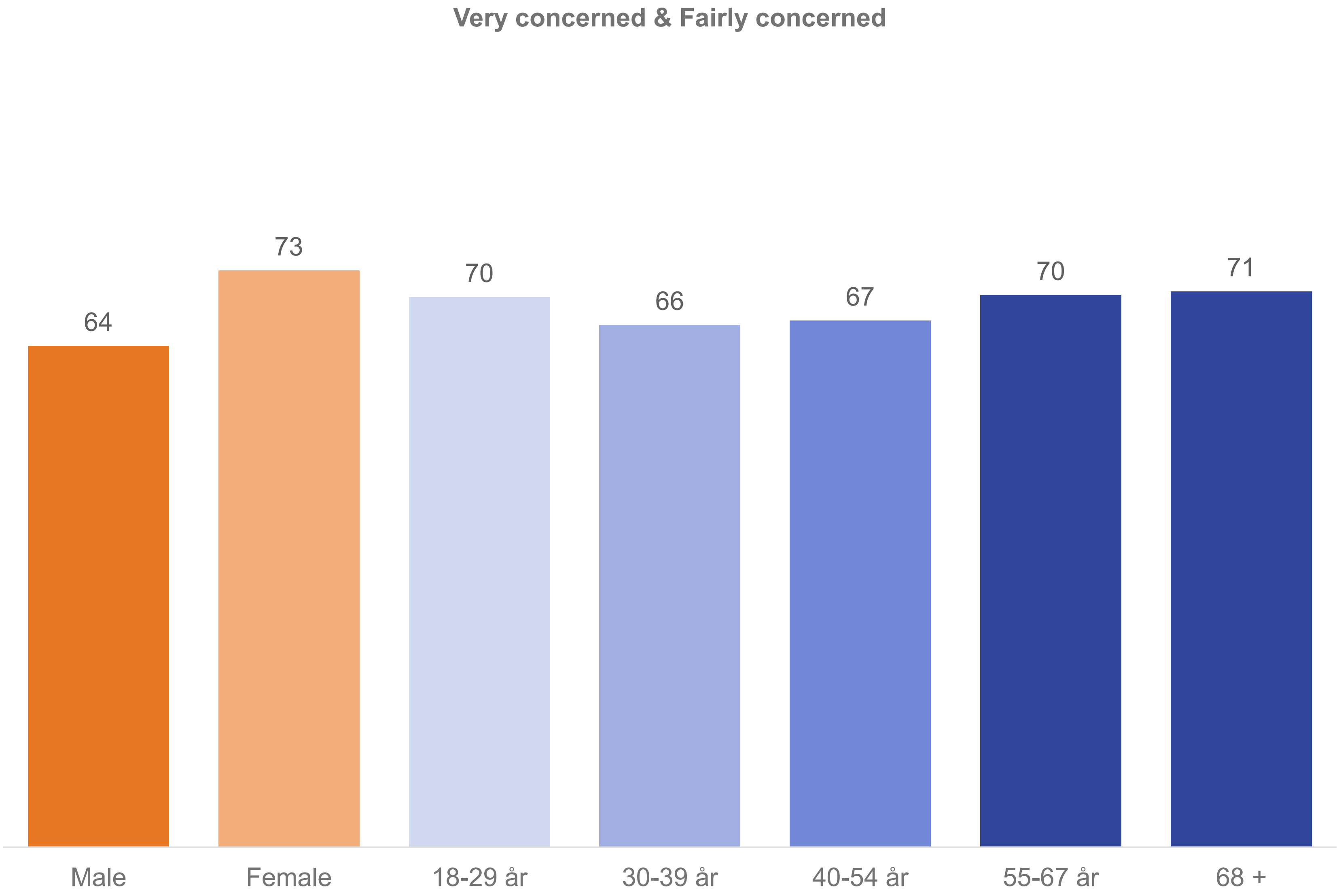
Norway is the least concerned country (52% total concerned) when talking about the topic of environmental consequences of plastic packaging. On the opposite end we find Lithuania with 84% share being concerned.



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?

DEMOGRAPHIC BREAKOWN



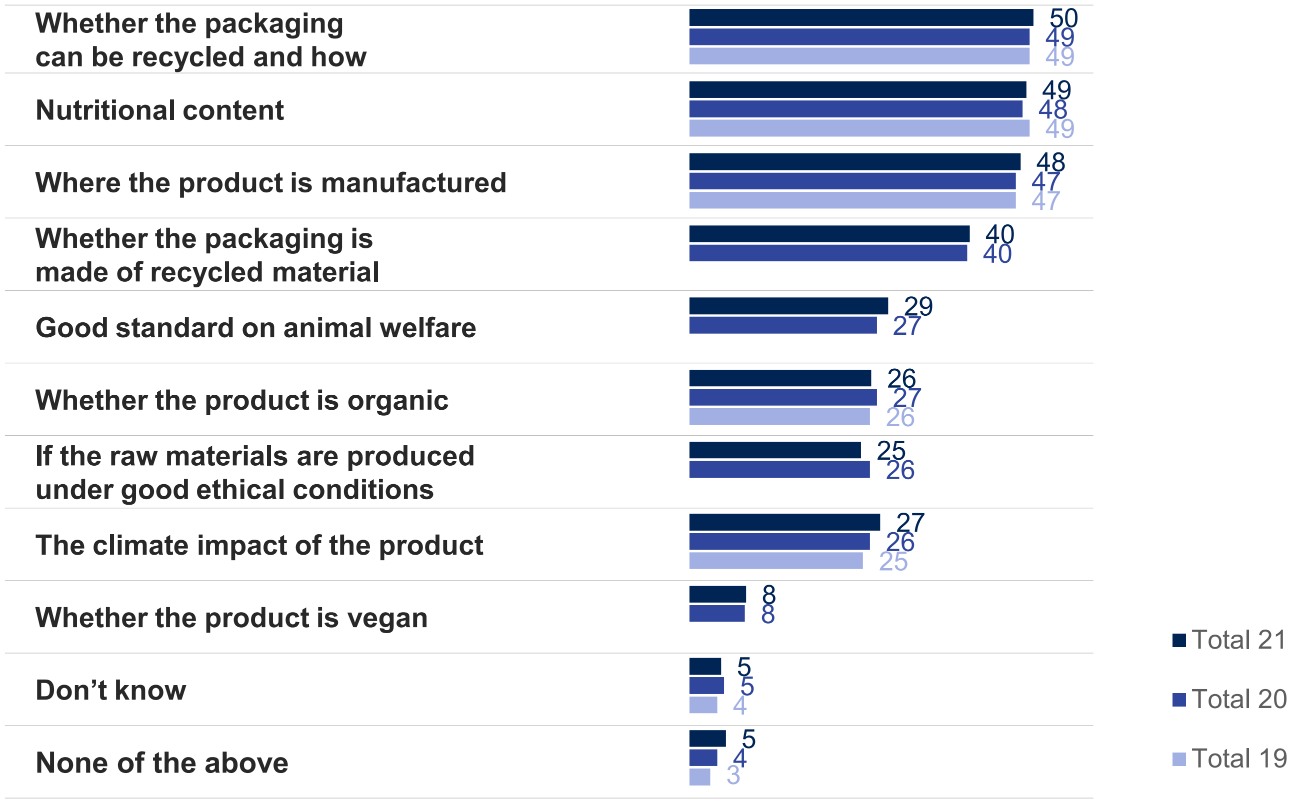
Base: All, N=7000 (1000 pr. country)

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?

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

- Whether the packaging can be recycled and how
- Nutritional content
- Where the product is manufactured
- Whether the packaging is made of recycled material
- Good standard on animal welfare
- Whether the product is organic
- If the raw materials are produced under good ethical conditions
- The climate impact of the product
- Whether the product is vegan

WHAT INFORMATION IS THE MOST IMPORTANT TO INCLUDE ON PRODUCT PACKAGING?

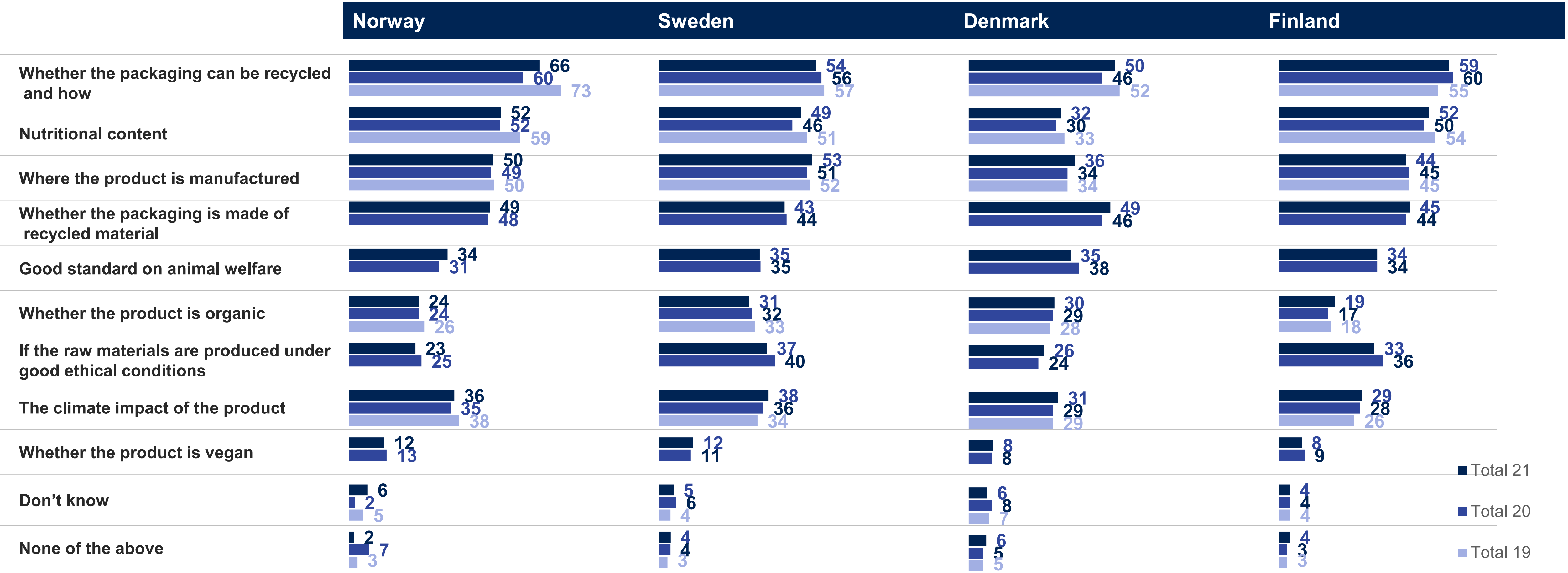


- The most important information to include on product packaging is still recycling instructions, nutritional content and where it was manufactured.
- The changes from previous years are sparse on the top contenders.
- But there is movement for some climate related points. Importance of information on animal welfare has gained 2pp, and climate impacts is also continuing its growth.

Base: All, N=7000 (1000 pr. country)
Q3_5. Which if any of the following information are important to you on product packaging?

THE NORDICS

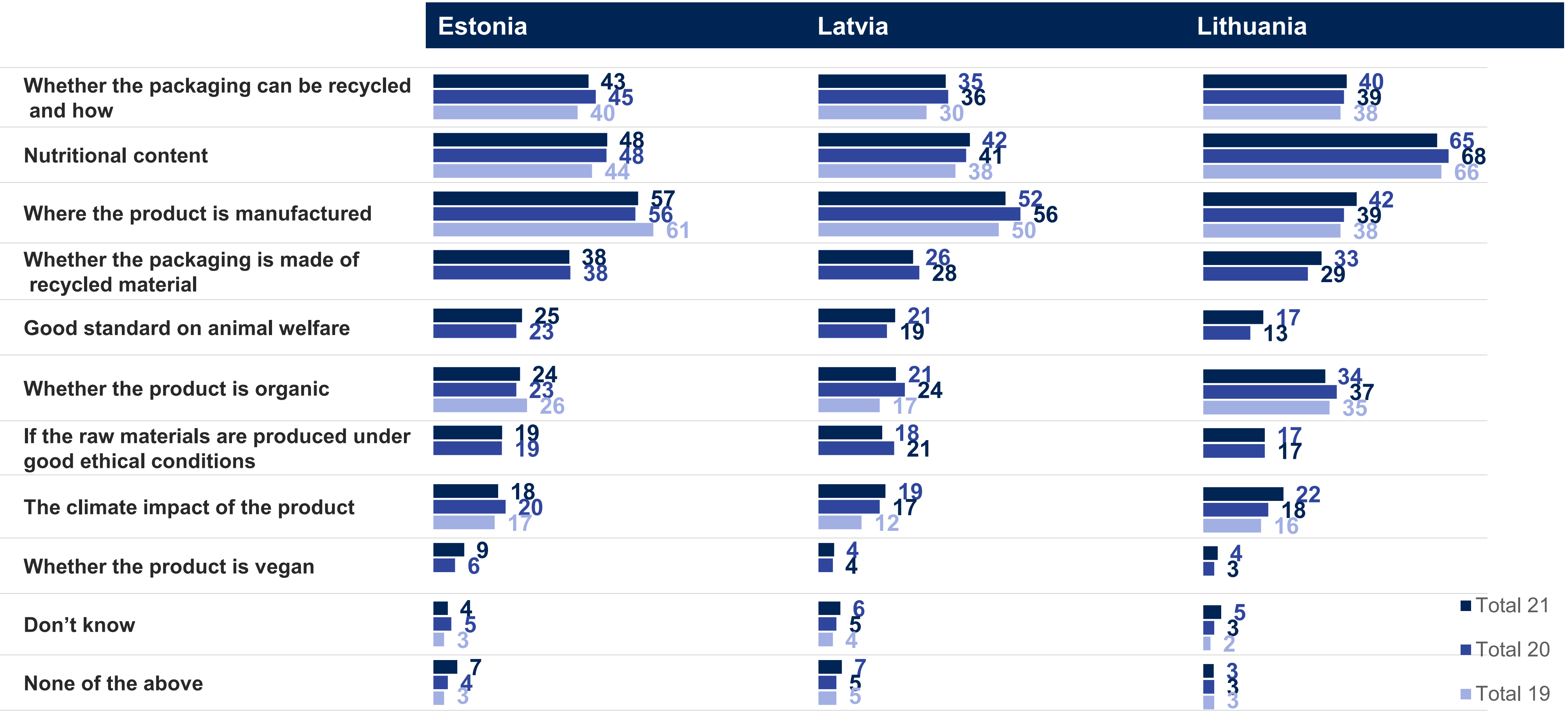
Recycling instructions seem to be the most important in Norway. The Danes are not as concerned with the nutritional content. Sweden cares a bit more about manufacturing location.



Base: All, N=7000 (1000 pr. country)
Q3_5. Which if any of the following information are important to you on product packaging?

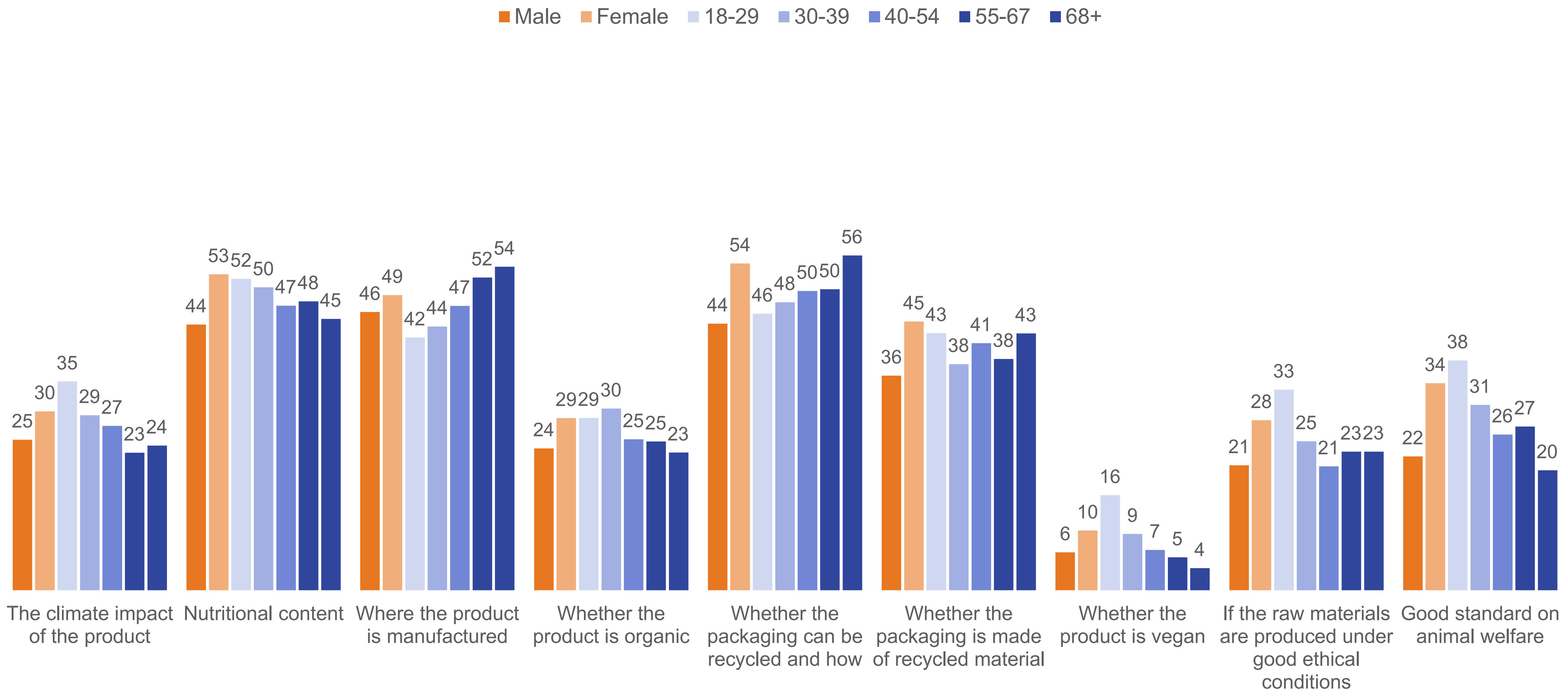
THE BALTICS

Nutritional content is by far the most important in Lithuania, where the manufacturing location matters the least. In both Latvia and Estonia manufacturing location is the most important information.



Base: All, N=7000 (1000 pr. country)
Q3_5. Which if any of the following information are important to you on product packaging?

DEMOGRAPHIC BREAKOWN



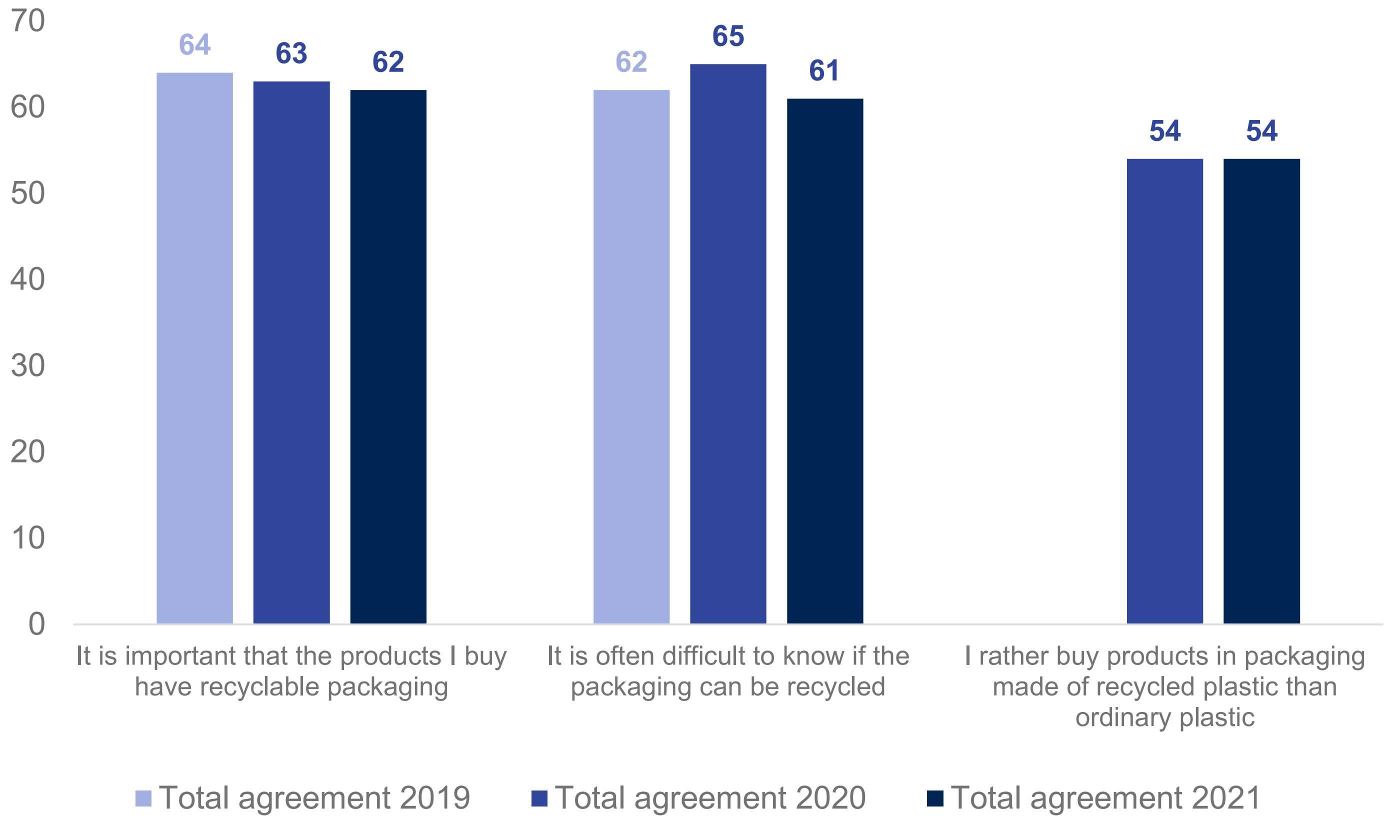
Base: All, N=7000 (1000 pr. country)
Q3_5. Which if any of the following information are important to you on product packaging?

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

- It is important that the products I buy have recyclable packaging
- It is often difficult to know if the packaging can be recycled
- I rather buy products in packaging made of recycled plastic than ordinary plastic
- It is important for me to recycle packaging made of plastics
- I am willing to pay more for products with biobased plastic packaging
- I try to avoid products with plastic packaging

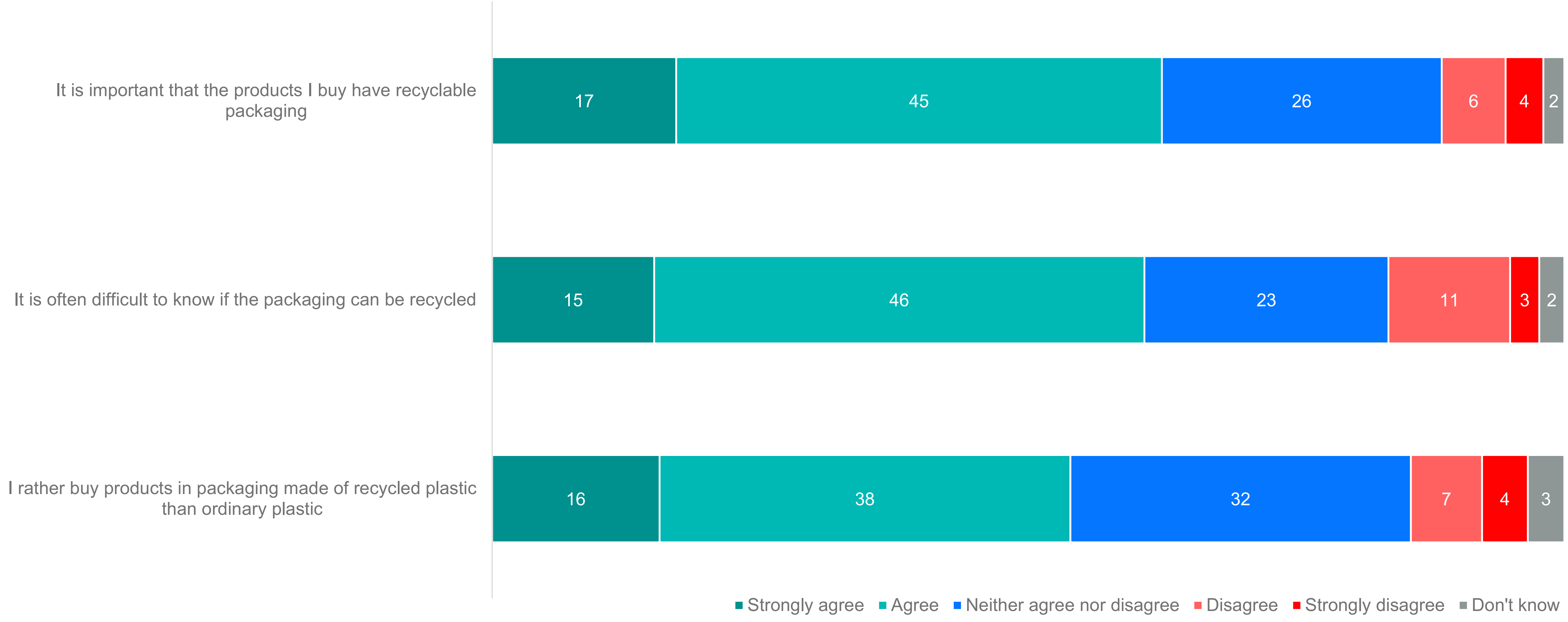
Scale 1-5

IMPORTANCE OF RECYCLABLE PACKAGING SHRINKING.



- The importance of having products packaged in recyclable packaging seems to overall continue to shrink. Down from 64% in 2019 to 62% today.
- In 2020 we saw an increase in responses saying its often difficult to know if packaging can be recycled, this time around the number is now lower than ever. But its still and important issue that seemingly affects 61% of people.
- The majority will still rather choose packaging made of recycled plastics, but no change since last year.

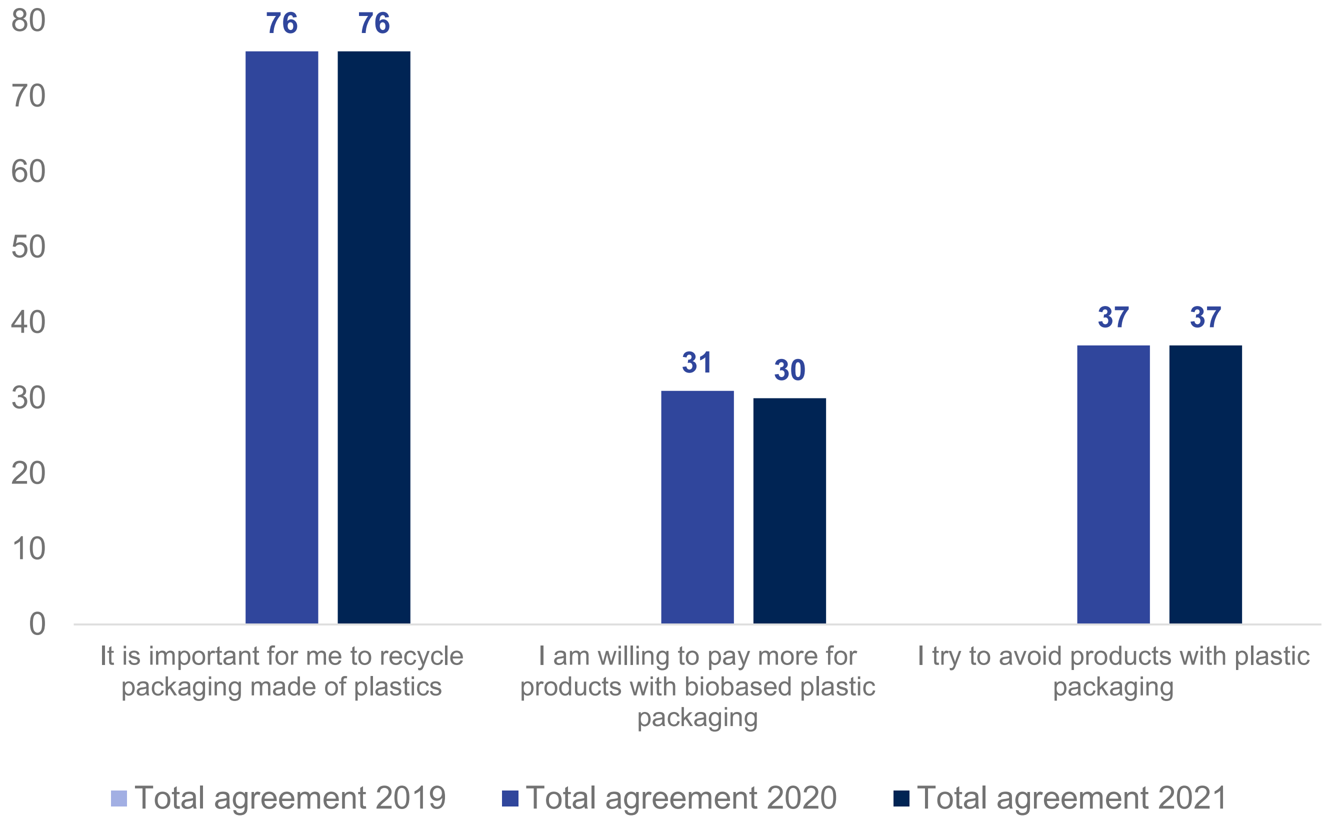
Base: All, N=7000 (1000 pr. country)
Q3.6 To what extent do you agree or disagree to the following statements?



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

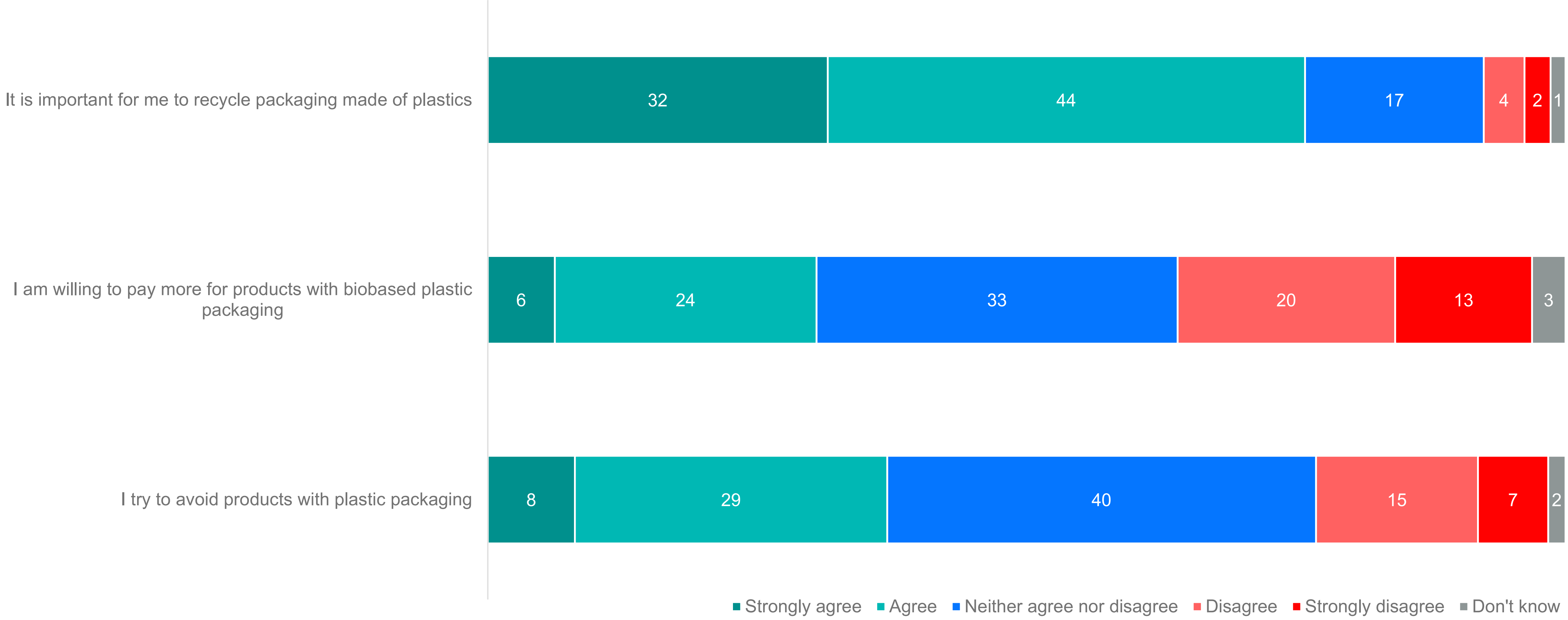
Q3.6 To what extent do you agree or disagree to the following statements?

A GROWING TENDENCY IN FINDING IT DIFFICULT TO KNOW WHETHER PACKAGING CAN BE RECYCLED



- It is still very important to most respondents to recycle packaging plastics. No change since our last survey.
- However, people are not willing to pay extra for an alternative bio based plastic packaging. Meaning another big driver here is clearly cost. This statement has also seen a small non-significant drop.
- Over a third of the respondents agree that they do try to avoid plastic packaging altogether. Again, we see no change from 2020.

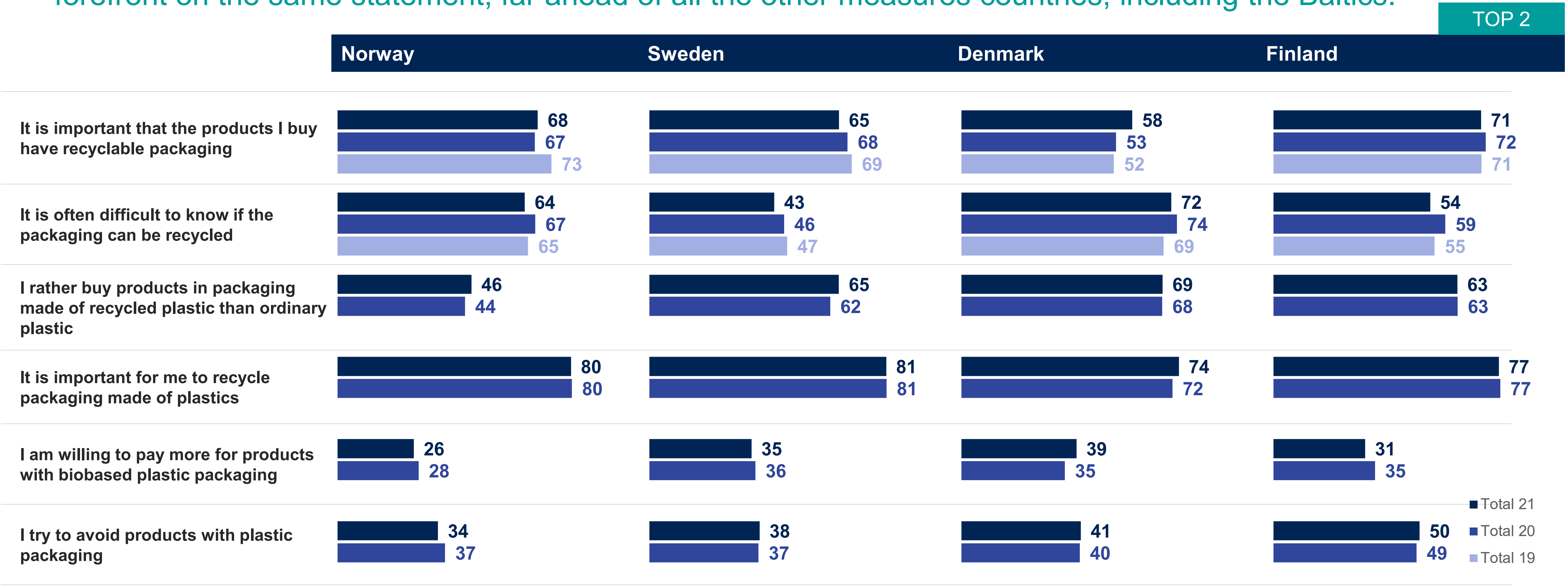
Base: All, N=7000 (1000 pr. country)
Q3.6 To what extent do you agree or disagree to the following statements?



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

THE NORDICS

In Denmark, the difficulty knowing if packaging can be recycled seems to be the highest. Sweden is at the forefront on the same statement, far ahead of all the other measures countries, including the Baltics.

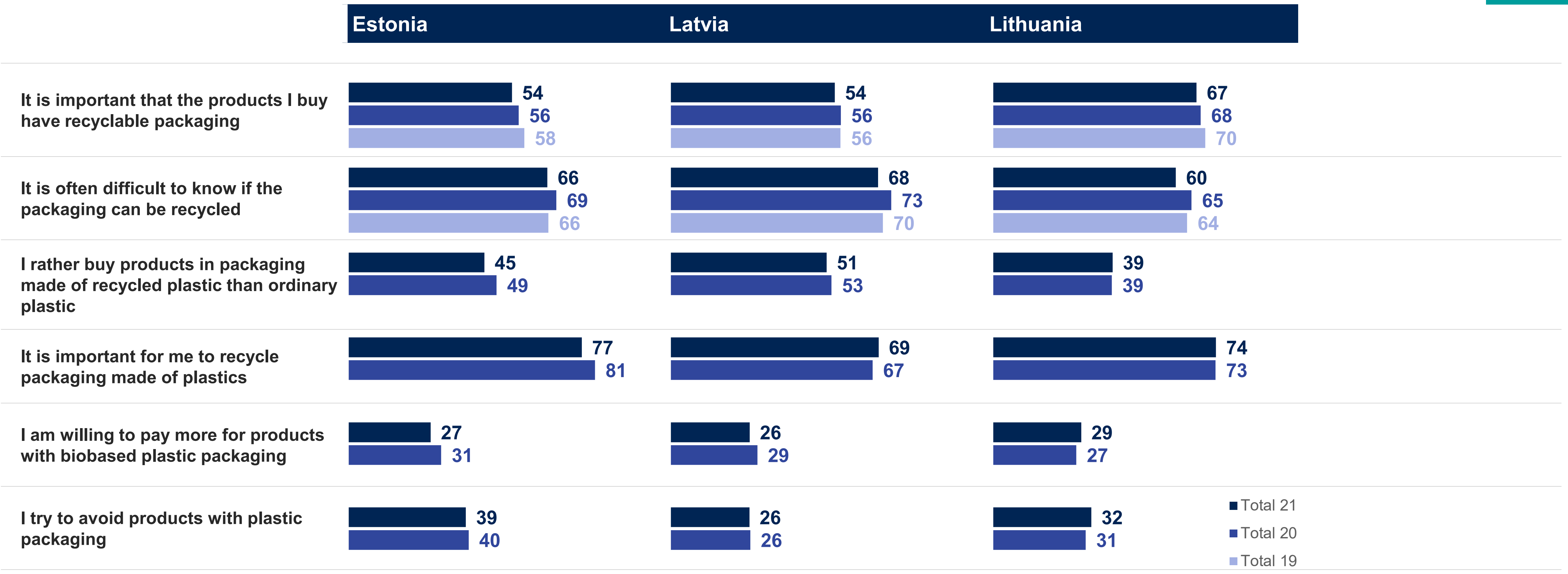


Base: All, N=7000 (1000 pr. country)
Q3_6. To what extent do you agree or disagree to the following statements?:

THE BALTICS

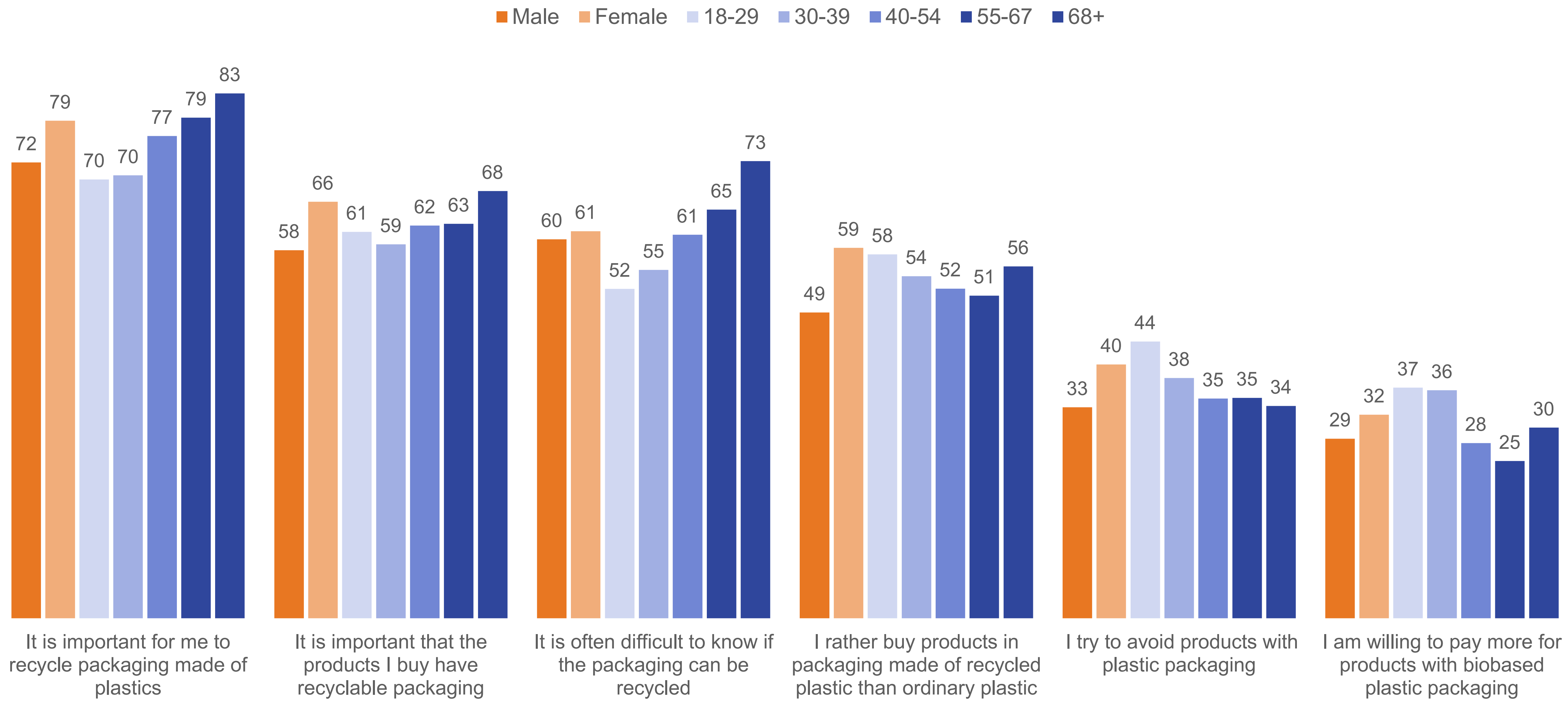
Lithuania has the highest shares of people agreeing that it is important that products have recyclable packaging. But at the same time they have the lowest shares stating they'd rather buy products with recycled plastics.

TOP 2



Base: All, N=7000 (1000 pr. country)
Q3_6. To what extent do you agree or disagree to the following statements?:

DEMOGRAPHIC BREAKOWN



Base: All, N=7000 (1000 pr. country)
Q3_6. To what extent do you agree or disagree to the following statements?:

DIETARY HABITS

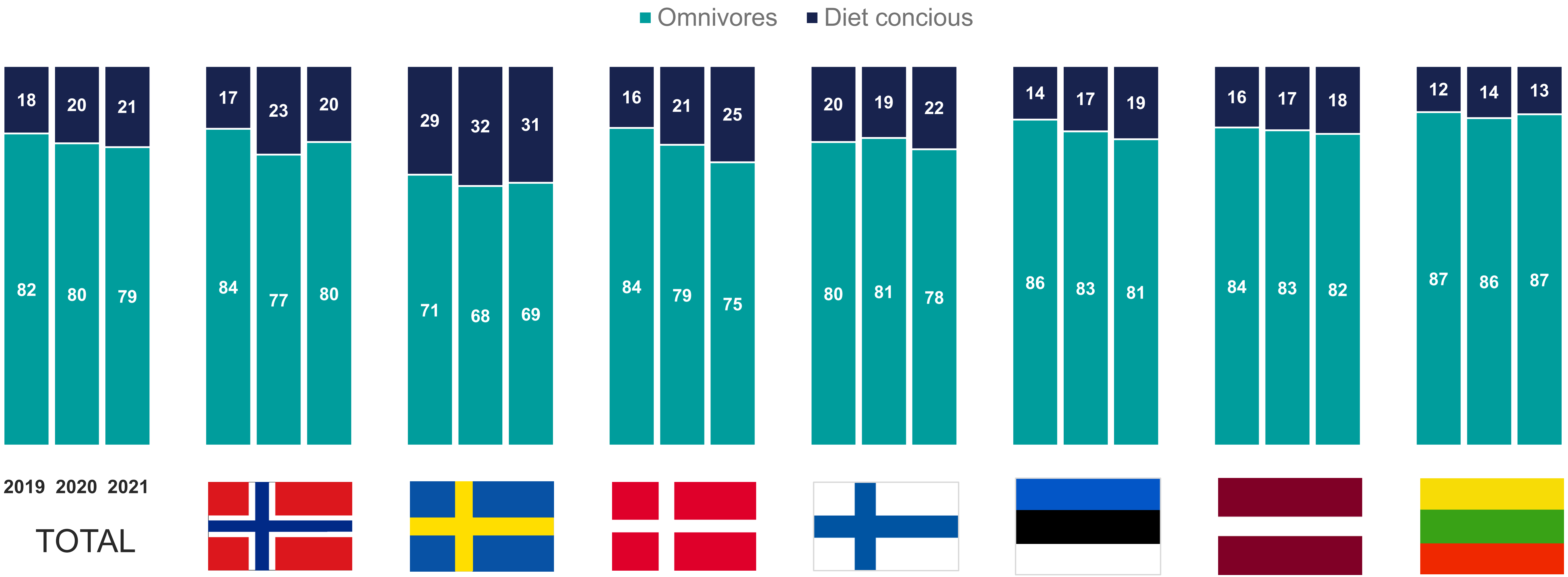
5

Which of the following statements is the best description of your current diet?

Sorted as:

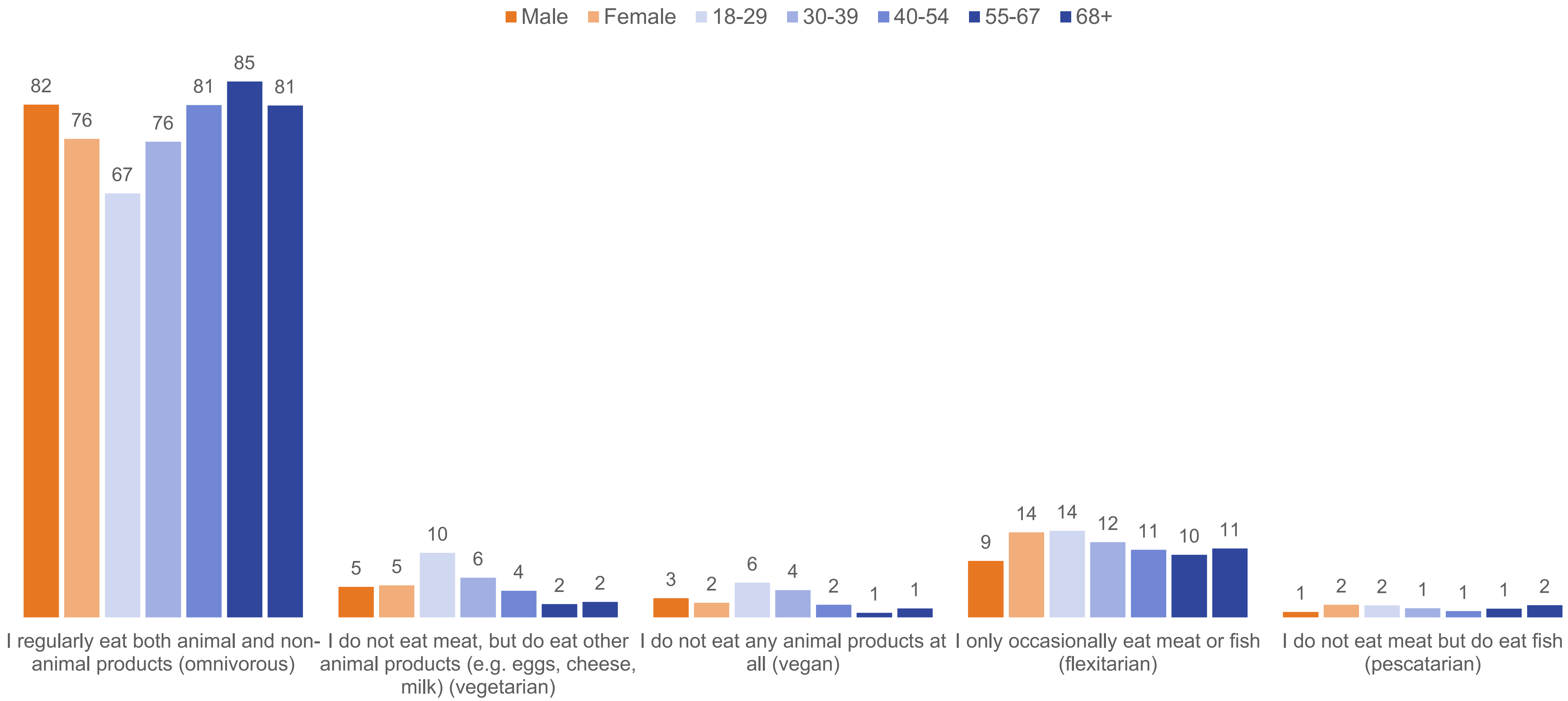
- **Omnivore**
- **Diet Conscious**

A CONTINUING DECREASING SHARE OF OMNIVORES. DENMARK HAS THE LARGEST CHANGE, BUT SWEDEN STILL HAS THE MOST DIET CONCIOUS.



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

DEMOGRAPHIC BREAKOWN



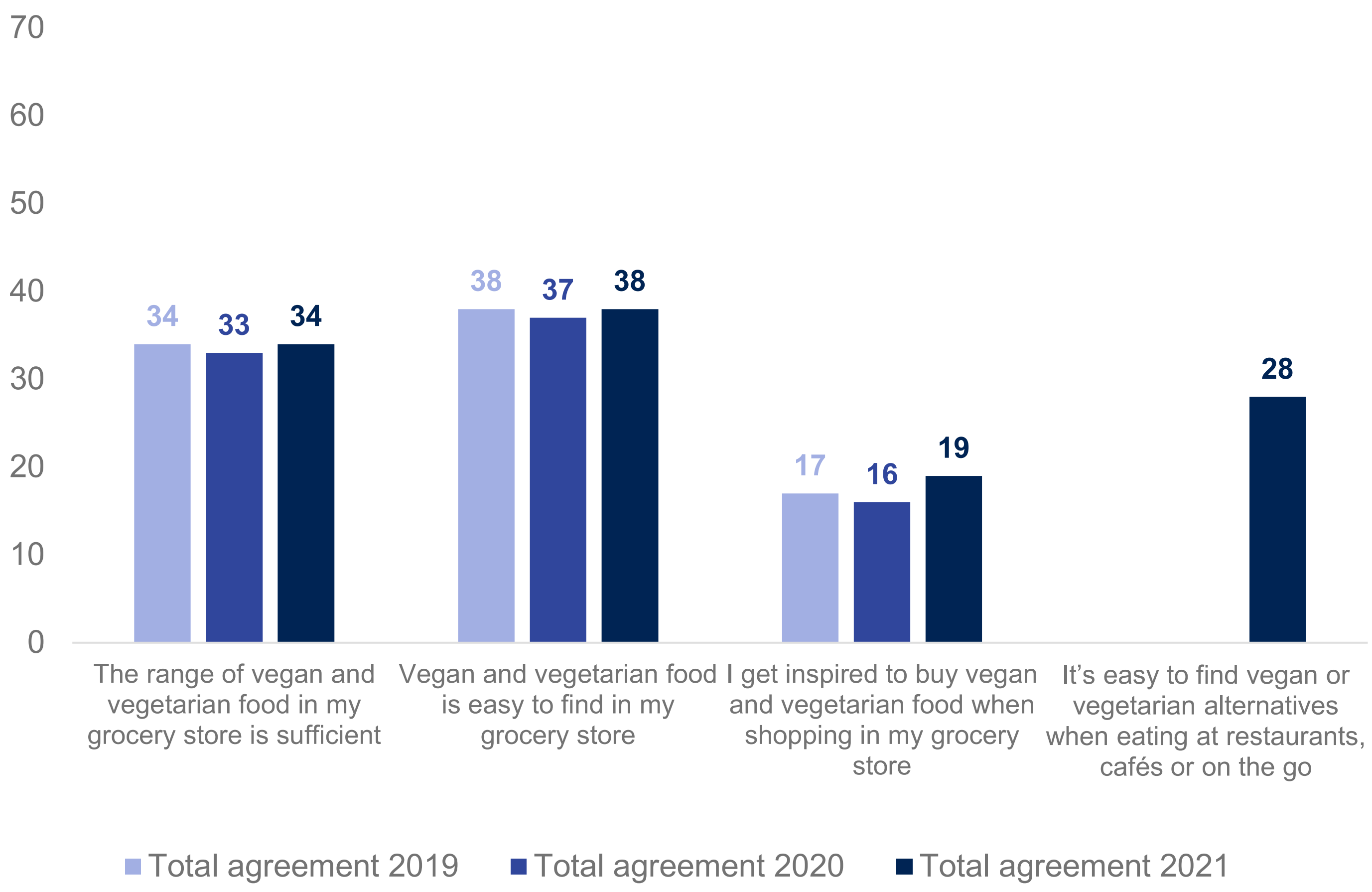
Base: All, N=7000 (1000 pr. country)

Q4.7 Which of the following statements is the best description of your current diet?

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

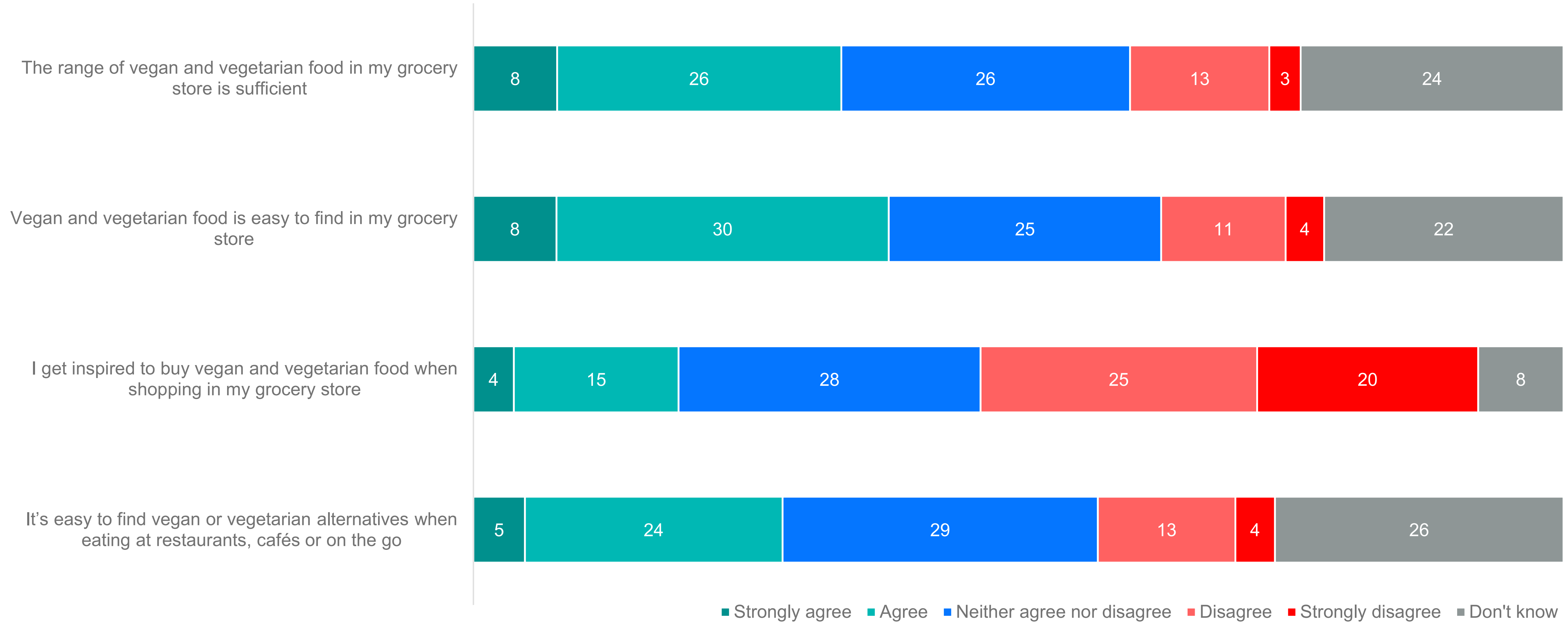
- The range of vegan and vegetarian food in my grocery store is sufficient
- Vegan and vegetarian food is easy to find in my grocery store
- I get inspired to buy vegan and vegetarian food when shopping in my grocery store
- It’s easy to find vegan or vegetarian alternatives when eating at restaurants, cafés or on the go (2021)

NUMBER BOUNCING BACK FROM A SLIGHT DECLINE LAST YEAR.



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

- In 2020 we saw a sight decline in agreeance for all the statements. This year we are seeing that turn back around.
- Keep in mind that there are a lot of people to whom these statements don't apply.
- We have also added a statement about how easy it is to find vegetarian or vegan alternative when eating out. 28% agree to this statement.
- There is a significant jump of 3pp linked to inspiration to buy vegan food when grocery shopping. Suggesting there might be more activity on this front.

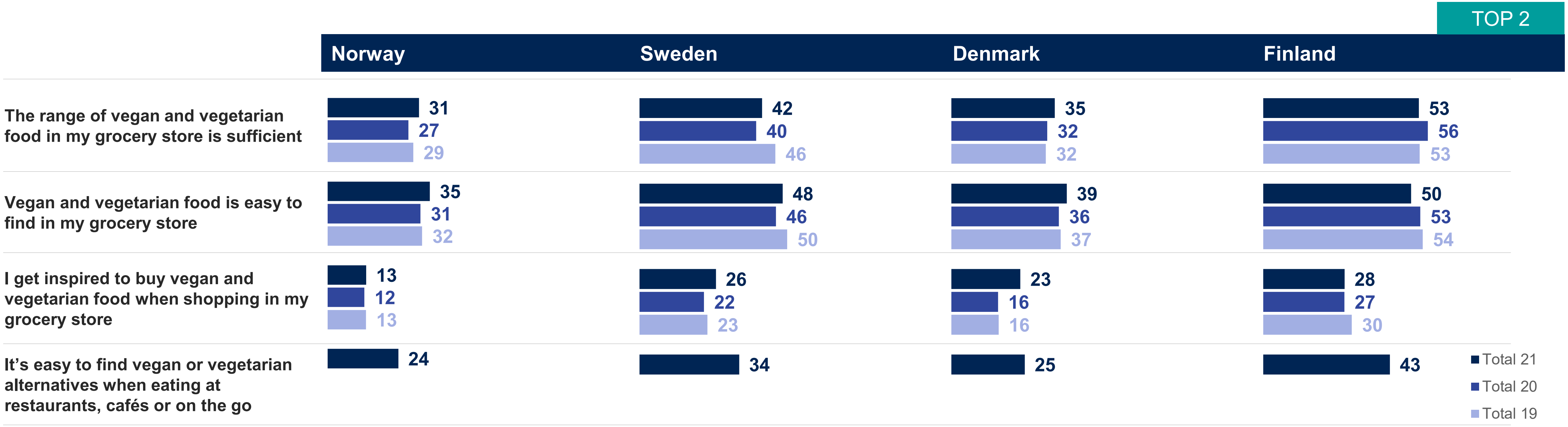


Base: All, N=7000 (1000 pr. country)

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

THE NORDICS

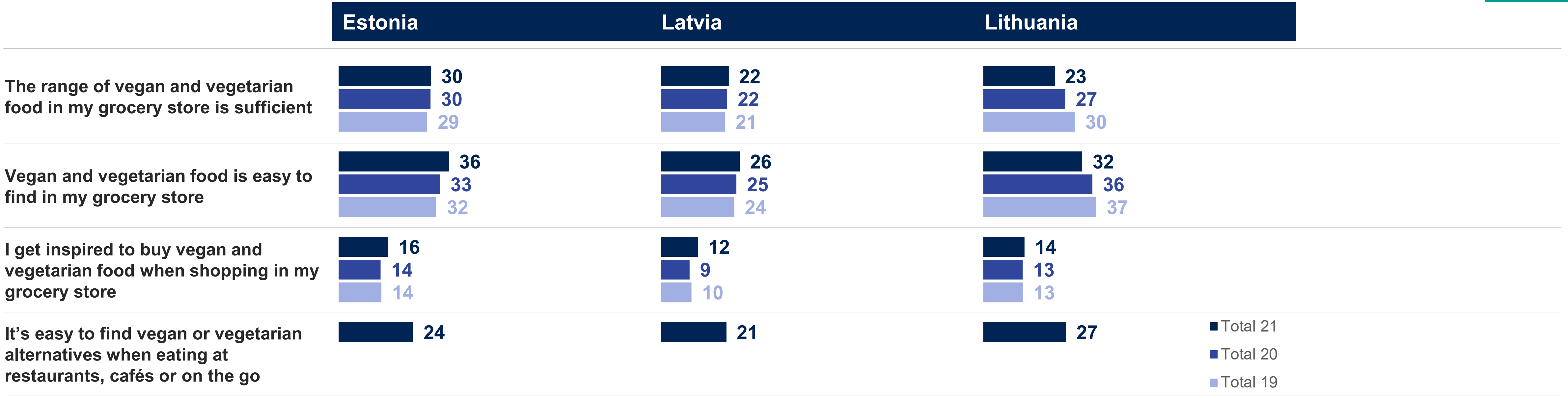
Finland still seems to have the most sufficient availability of vegan and vegetarian for their needs this applies across all the statements. Norway falls a bit short in this category.



Base: All, N=7000 (1000 pr. country)
Q4_8. To what extent do you agree or disagree with these statements?:

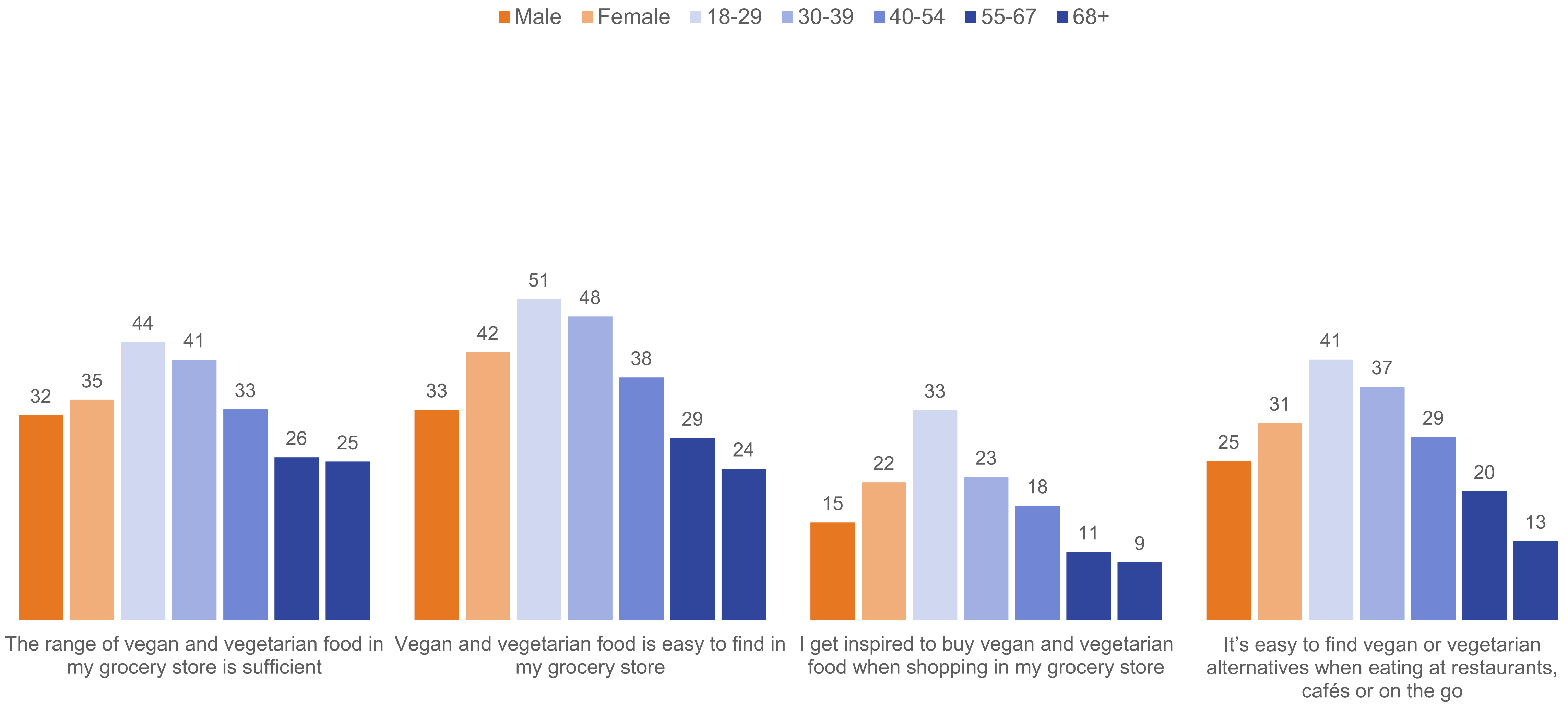
Similar to Norway, the Baltics also seem to have a much less sufficient availability of vegan and vegetarian options compared to the other Nordic countries. Latvia with the least share of agreement.

TOP 2



Base: All, N=7000 (1000 pr. country)
Q4_8. To what extent do you agree or disagree with these statements?:

DEMOGRAPHIC BREAKOWN

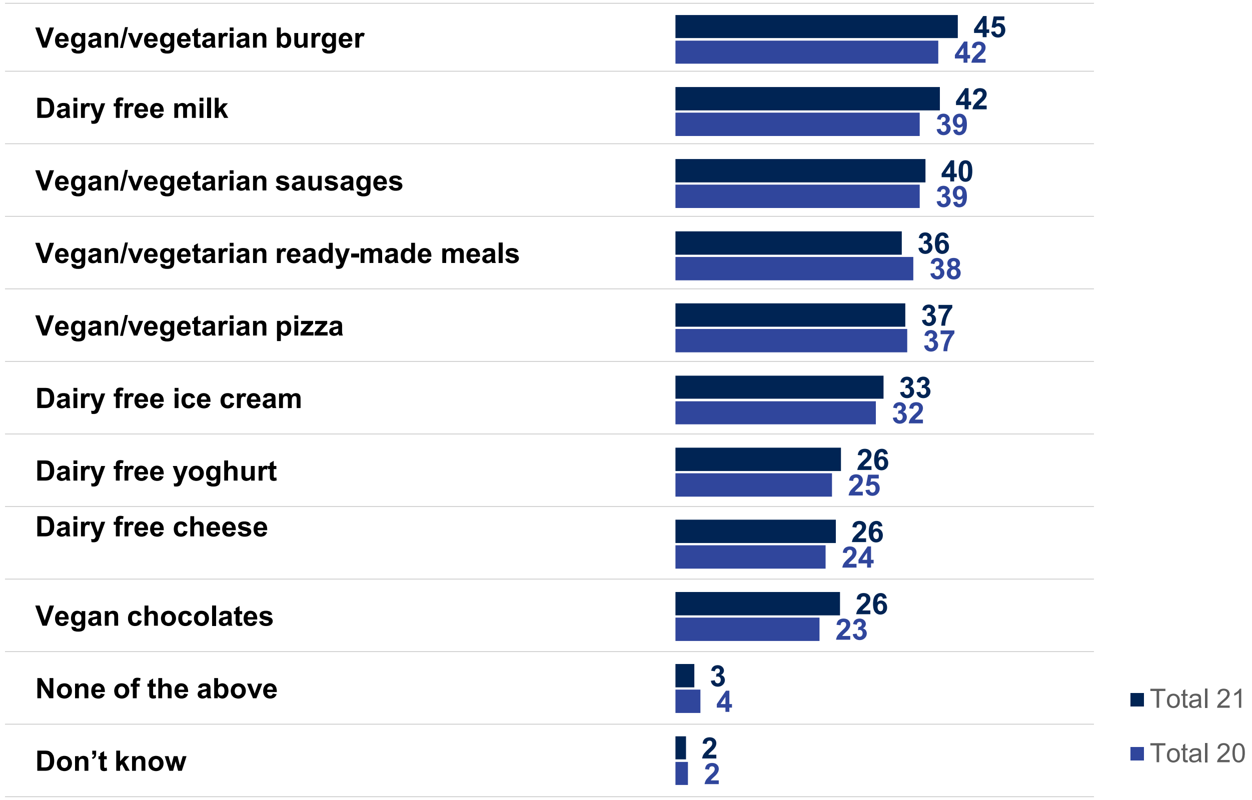


Base: All, N=7000 (1000 pr. country)
Q4.8 To what extent do you agree or disagree with these statements?

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

- Vegan/vegetarian burger
- Dairy free milk
- Vegan/vegetarian sausages
- Vegan/vegetarian ready-made meals
- Vegan/vegetarian pizza
- Dairy free ice cream
- Dairy free yoghurt
- Dairy free cheese
- Vegan chocolates

BURGERS, MILK AND SAUSAGES ARE STILL THE MOST POPULAR VEGETARIAN/VEGAN PRODUCT CATEGORIES



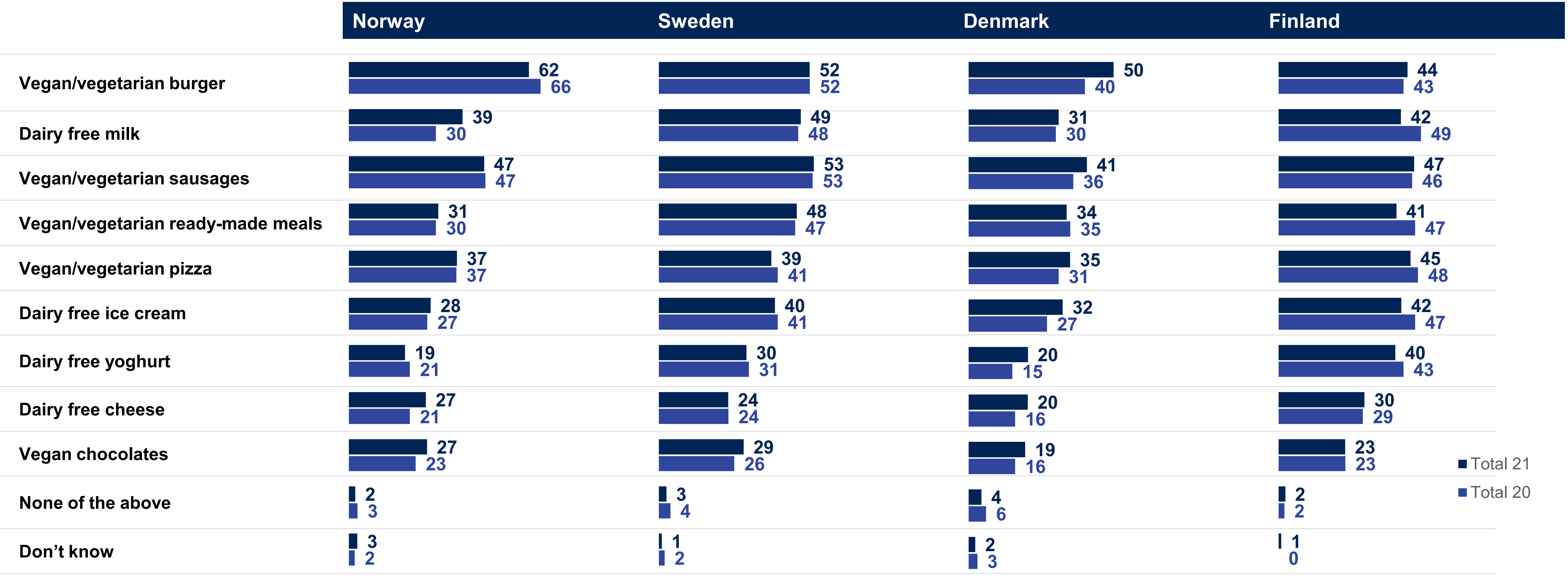
- Overall, there are quite a few more people who have tried the different types of vegan/vegetarian alternatives on the market.
- The biggest categories are still burgers and milk, both growing 3pp from last year. To put that in perspective that could potentially mean 750.000 more people have now tried a products within each of these categories compared to a year ago.
- The only category that has a significant decrease is ready-made meals, which drops from 38% to 36%.
- Also, interesting to note that only 3% answer that the have not tried any of the alternatives. Meaning basically everyone has tried some form of alternative product.

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

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

THE NORDICS

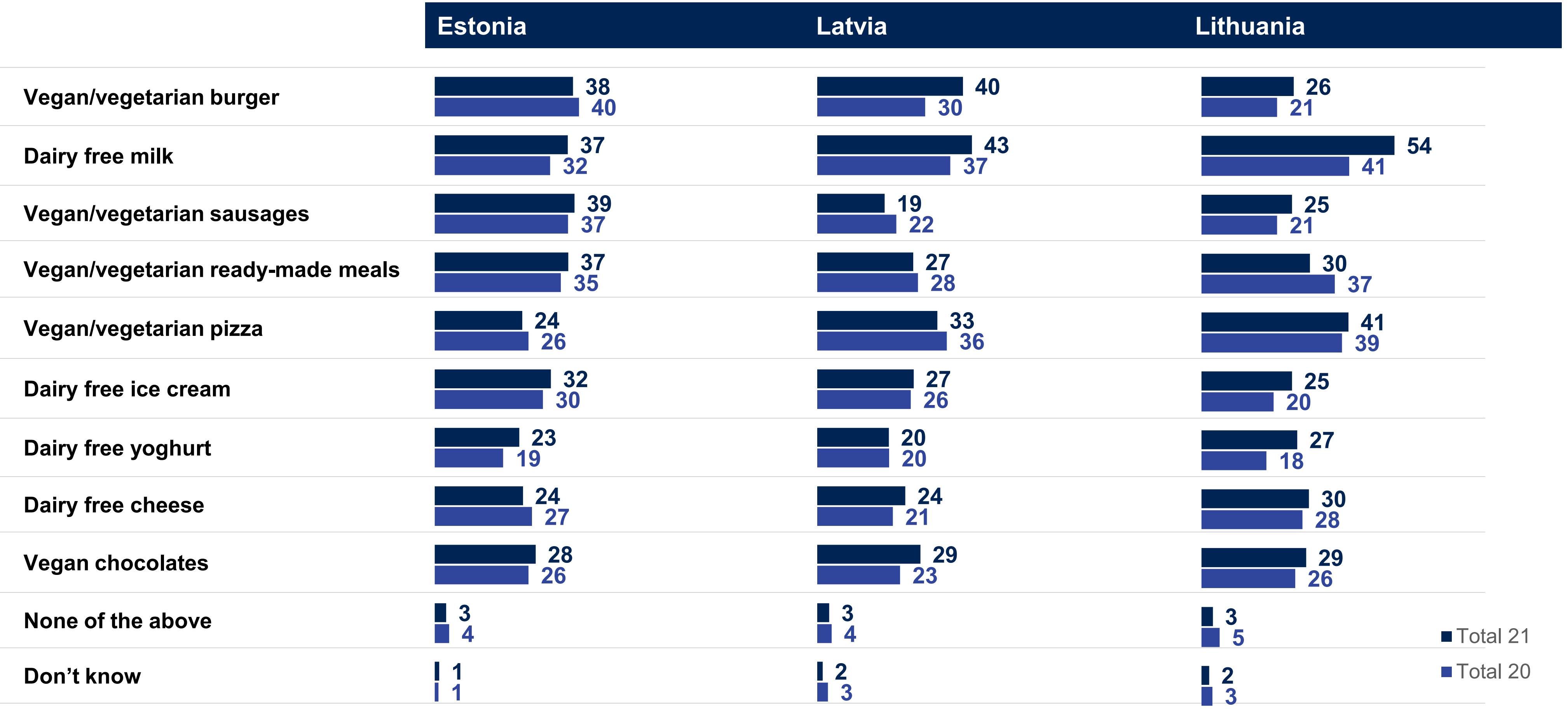
In Norway, the vegetarian burger is by far the most tested product, but they fall behind on a few other categories. Denmark has the lowest adaption for most of the categories. Finland has the highest adaption rate in the dairy-free category as a whole.



Base: All, N=7000 (1000 pr. country)
Q4_10. Which of the following ready-made vegetarian/vegan products have you ever purchased/tasted?:

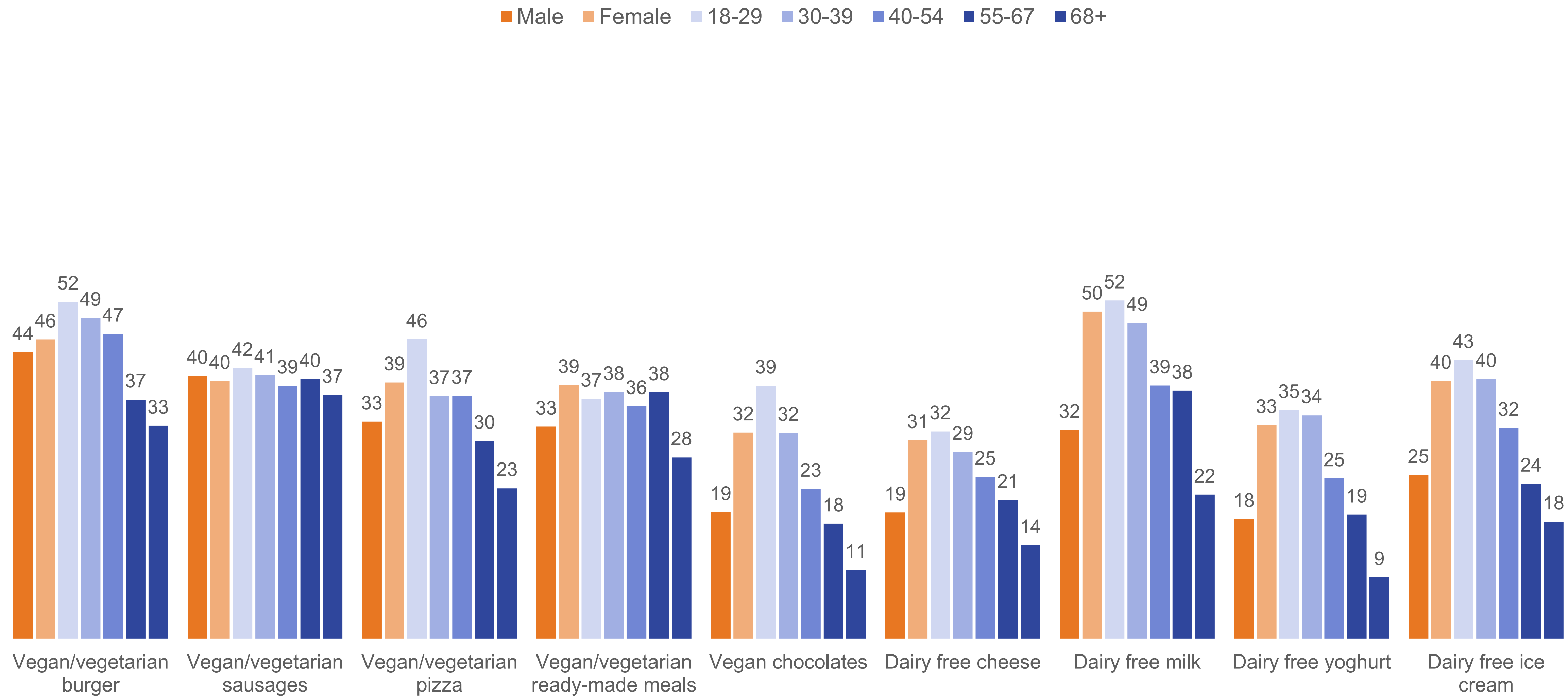
THE BALTICS

Compared to the Nordics, the Baltic countries have a lower adaption in most categories. But Lithuania has the highest adaption of dairy free milk products amongst all the countries, after a massive 13pp jump this year.



Base: All, N=7000 (1000 pr. country)
Q4_10. Which of the following ready-made vegetarian/vegan products have you ever purchased/tasted?:

DEMOGRAPHIC BREAKOWN



Base: All, N=7000 (1000 pr. country)
Q4_10. Which of the following ready-made vegetarian/vegan products have you ever purchased/tasted?:

NOTICE THAT ALL OF THE FOLLOWING SLIDES RELATES TO THE SHARE THAT HAVE TRIED SOME FORM OF READY-MADE PRODUCTS. THIS BASE IS LOWER AND VARIES BETWEEN THE COUNTRIES

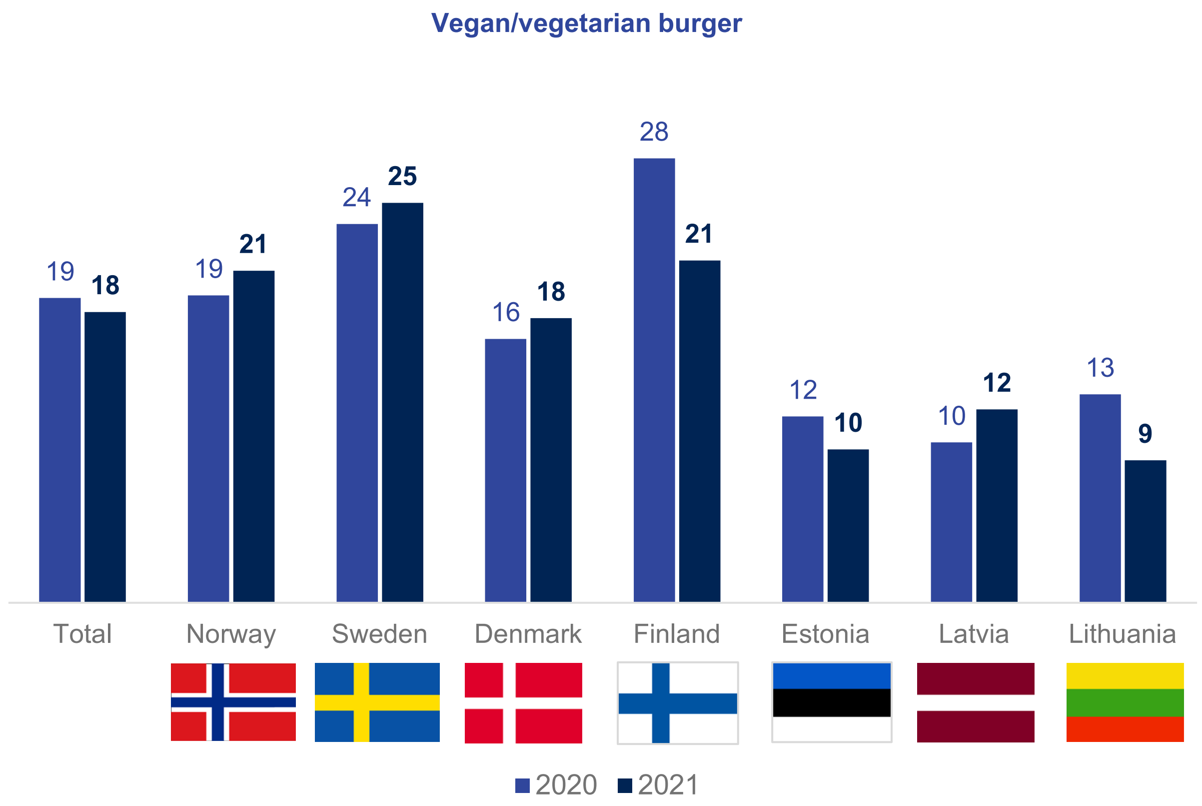
2020 2021

TOTAL

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

Q4_10a. Have you ever tasted any ready-made vegetarian/vegan products? (Like vegetarian/vegan sausages, burgers, dairy-free milk, etc.)?

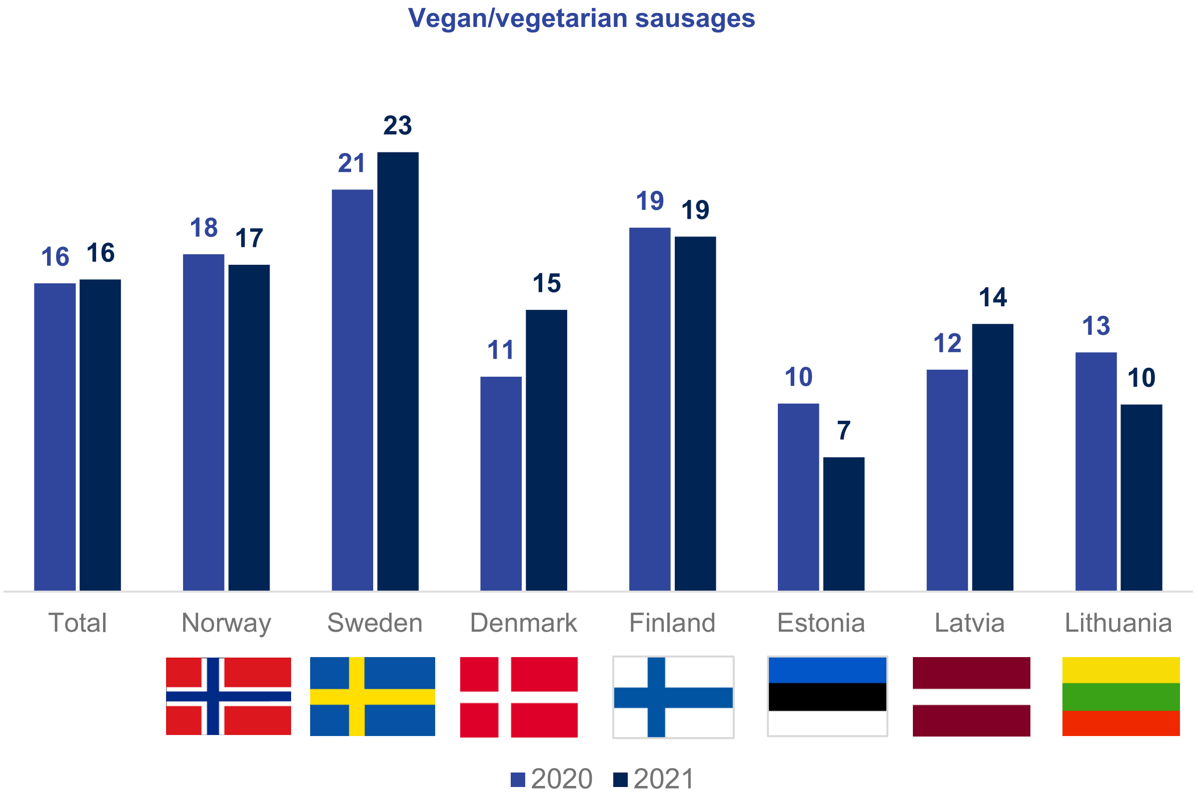
SHARE AMONGST ADAPTORS WHO PURCHASE VEGAN/VEGETARIAN BURGER MONTHLY OR MORE OFTEN



Base: have purchased **vegan/vegetarian burger, N2021=1849) N2020=1673**
Q4_10b. How often do you purchase these products?

- Be aware that the base for this question are the ones that already have said that they have purchased vegan/vegetarian burgers, and that these percentages reflect the share that actively continue to buy this type of product on at least a monthly basis. The remaining share have then either just tried it or buy it rarely.
- Finland who was on top last year with 28% has had a remarkable drop down to 21%.
- Sweden now has the highest numbers at 25% monthly eaters of vegan/vegetarian burgers.
- The Nordics have a might higher degree of buying regularly than the Baltics. It is also worth noting that Denmark is quite a bit behind its neighboring countries in adapting the vegan/vegetarian burger.

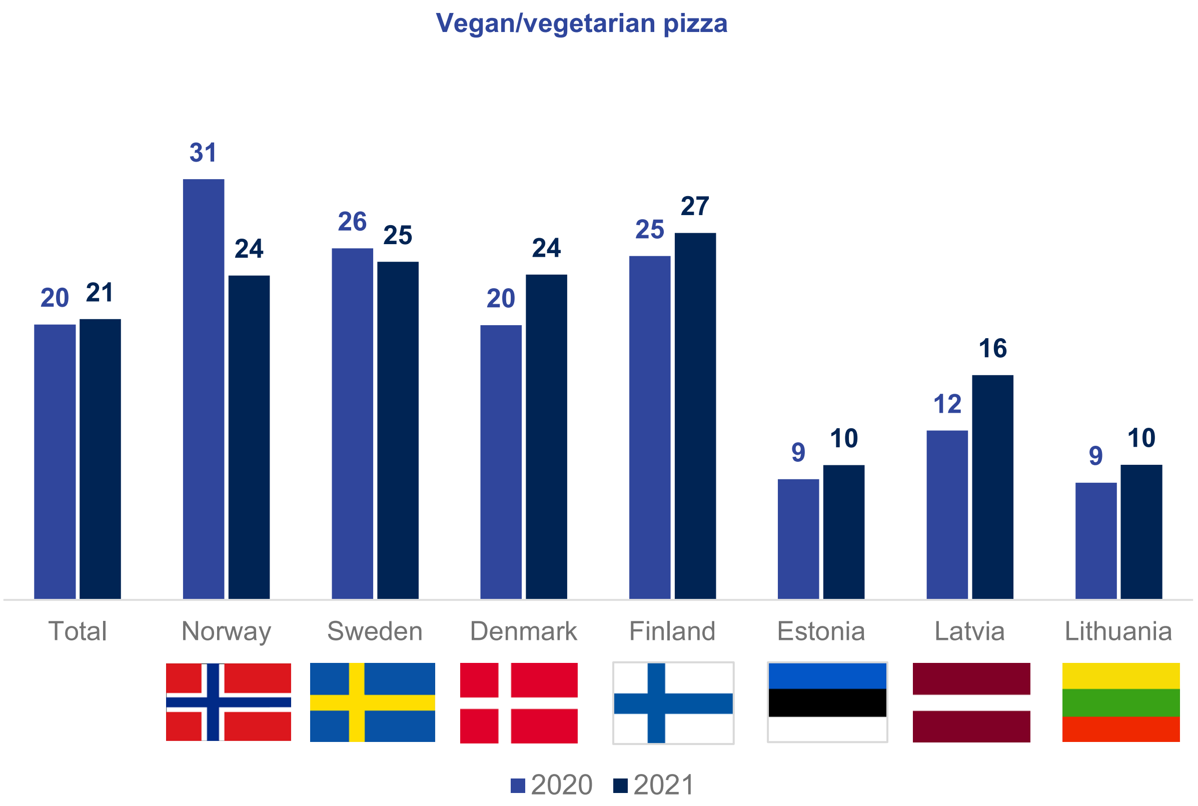
SHARE AMONGST ADAPTORS WHO PURCHASE VEGAN/VEGETARIAN SAUSAGES MONTHLY OR MORE OFTEN



- Be aware that the base for this question are the ones that already have said that they have purchased vegan/vegetarian sausages, and that these percentages reflect the share that actively continue to buy this type of product on at least a monthly basis. The remaining share have then either just tried it or buy it rarely.
- Again the highest shares are in Sweden. And elsewhere we se almost the same patterns as for the burgers.

Base: have purchased **Vegan/vegetarian sausages, N2021=1637, N2020= 1527**
Q4_10b. How often do you purchase these products?

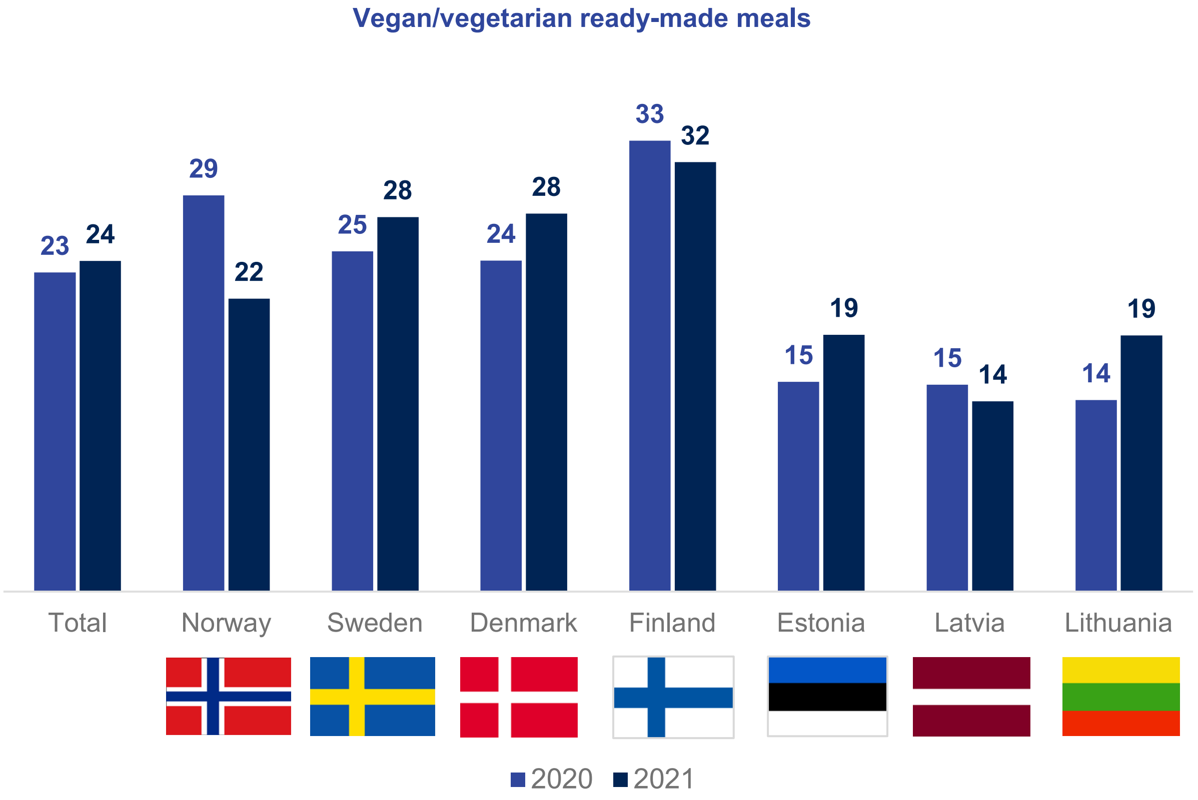
SHARE AMONGST ADAPTORS WHO PURCHASE VEGAN/VEGETARIAN PIZZA MONTHLY OR MORE OFTEN



- Be aware that the base for this question are the ones that already have said that they have purchased vegan/vegetarian pizza, and that these percentages reflect the share that actively continue to buy this type of product on at least a monthly basis. The remaining share have then either just tried it or buy it rarely.
- Share for vegan/vegetarian pizza has on a total basis gone slightly up.
- Norway drops from a very high number last year, to a more average level this year.
- All the Baltic countries have a growth of monthly buyers in this category.

Base: have purchased **Vegan/vegetarian pizza, N2021=1505, N2020= 1476**
Q4_10b. How often do you purchase these products?

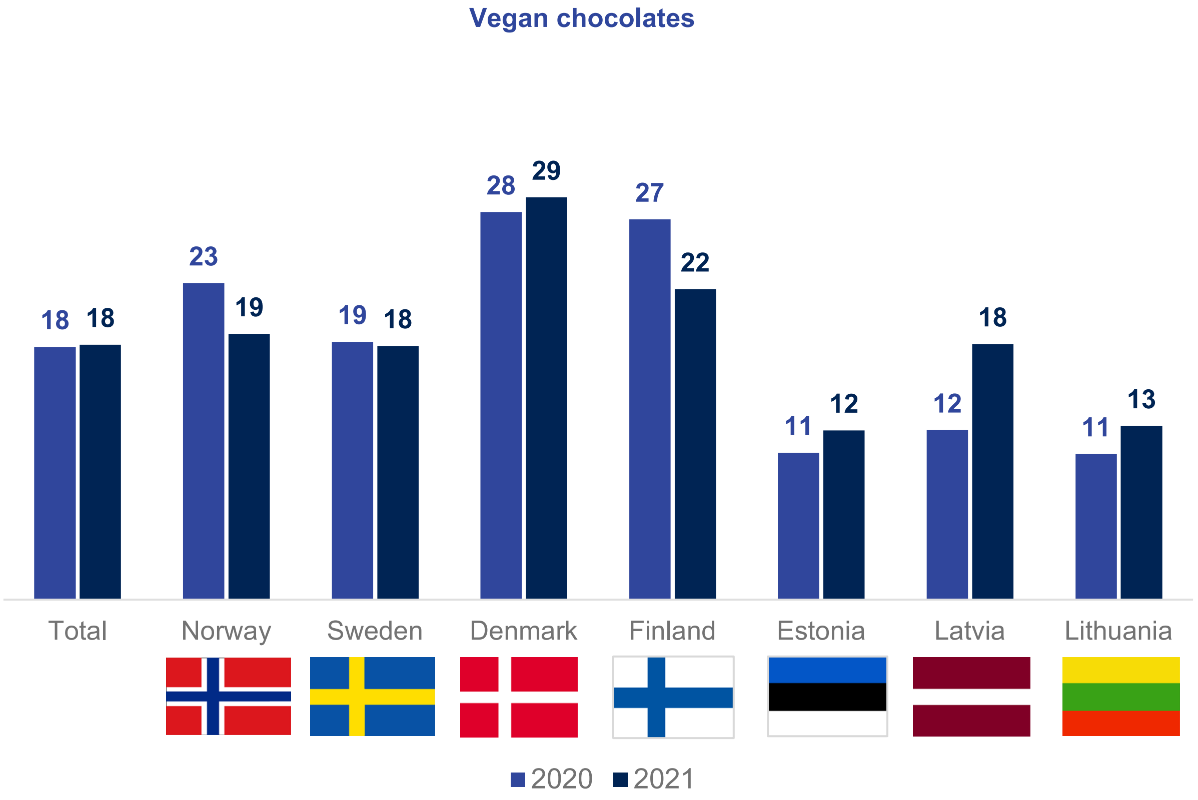
SHARE AMONGST ADAPTORS WHO PURCHASE VEGAN/VEGETARIAN READY-MADE MEALS MONTHLY OR MORE OFTEN



- Be aware that the base for this question are the ones that already have said that they have purchased this vegan/vegetarian alternative, and these percentages reflect the share that actively continue to buy this type of product on at least a monthly basis. The remaining share have then either just tried it or buy it rarely.
- Finland is still the country where active use of vegan/vegetarian ready meals are the most abundant.
- Total following is also higher than last year.

Base: have purchased **Vegan/vegetarian ready-made meals, N2021=1481, N2020=1495**
Q4_10b. How often do you purchase these products?

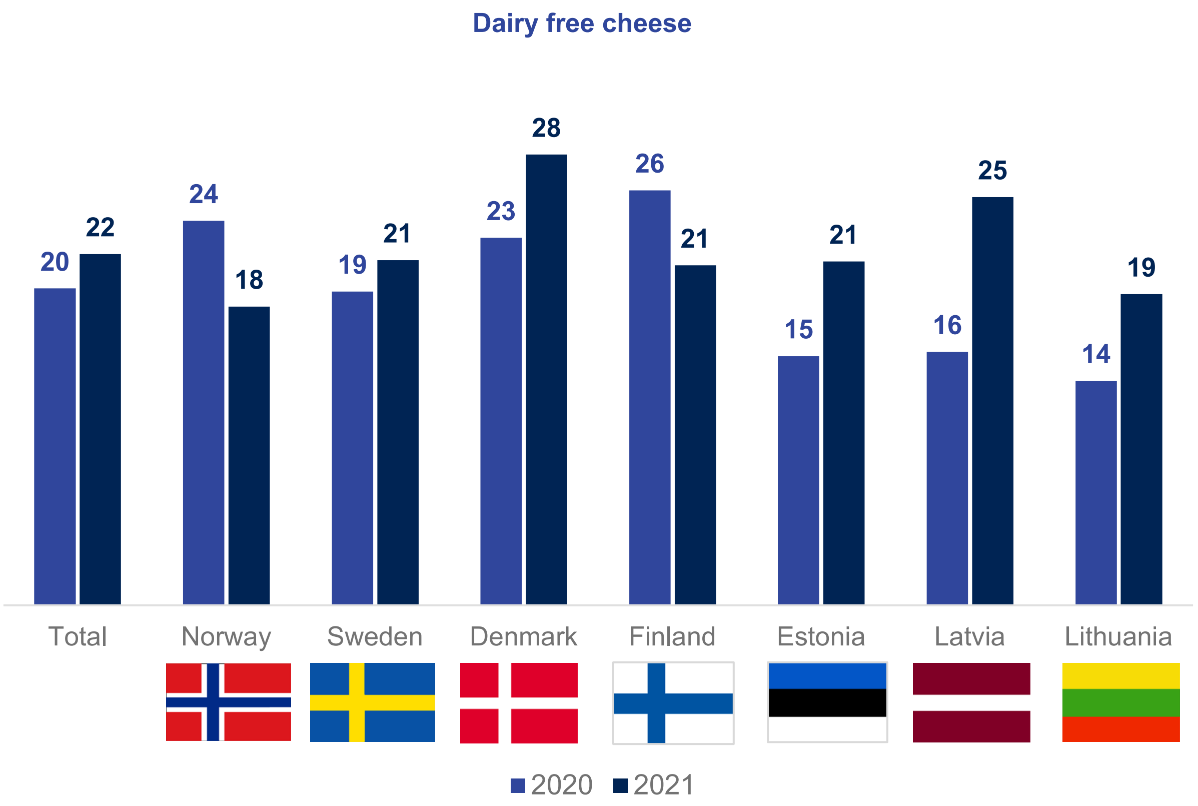
SHARE AMONGST ADAPTORS WHO PURCHASE VEGAN CHOCOLATE MONTHLY OR MORE OFTEN



- Be aware that the base for this question are the ones that already have said that they have purchased this vegan/vegetarian alternative, and these percentages reflect the share that actively continue to buy this type of product on at least a monthly basis. The remaining share have then either just tried it or buy it rarely.

Base: have purchased **Vegan chocolates, N2021=1076, N2020= 929**
Q4_10b. How often do you purchase these products?

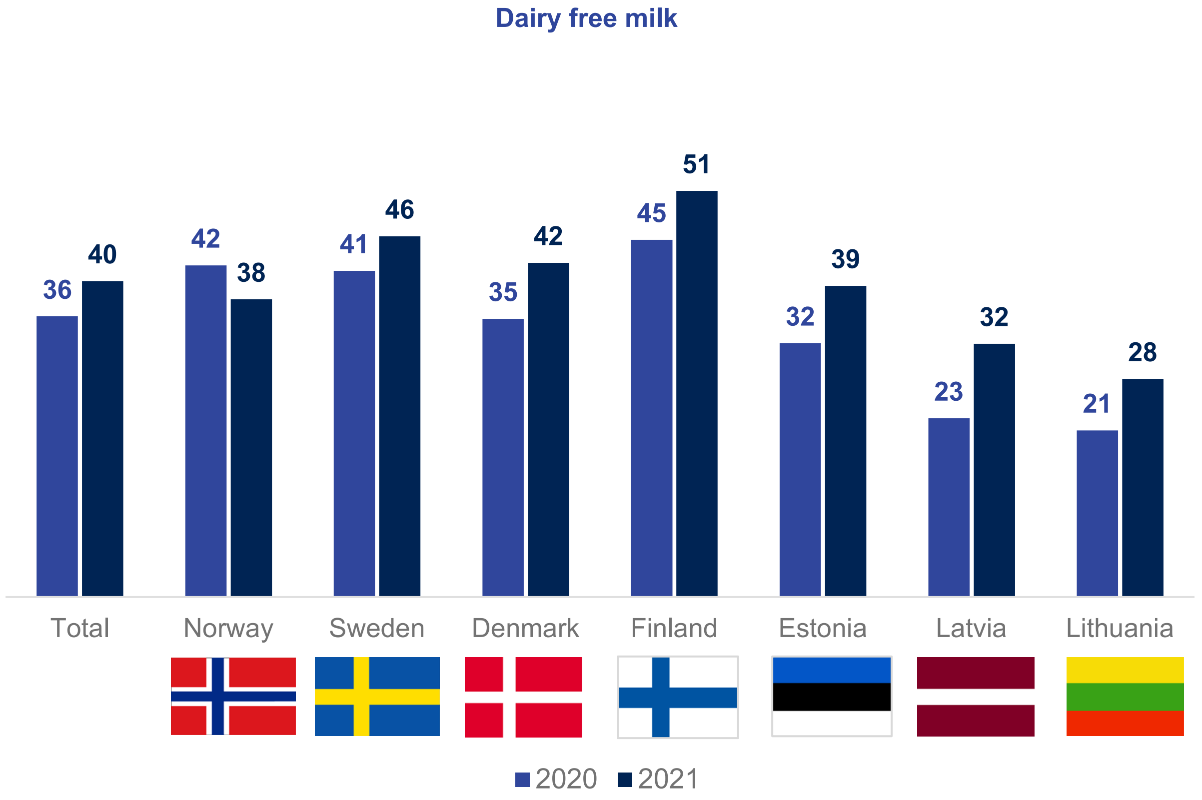
SHARE AMONGST ADAPTORS WHO PURCHASE DAILRY-FREE CHEESE MONTHLY OR MORE OFTEN



- Be aware that the base for this question are the ones that already have said that they have purchased this vegan/vegetarian alternative, and these percentages reflect the share that actively continue to buy this type of product on at least a monthly basis. The remaining share have then either just tried it or buy it rarely.

Base: have purchased **Dairy free cheese, N2021=1049, N2020=946**
Q4_10b. How often do you purchase these products?

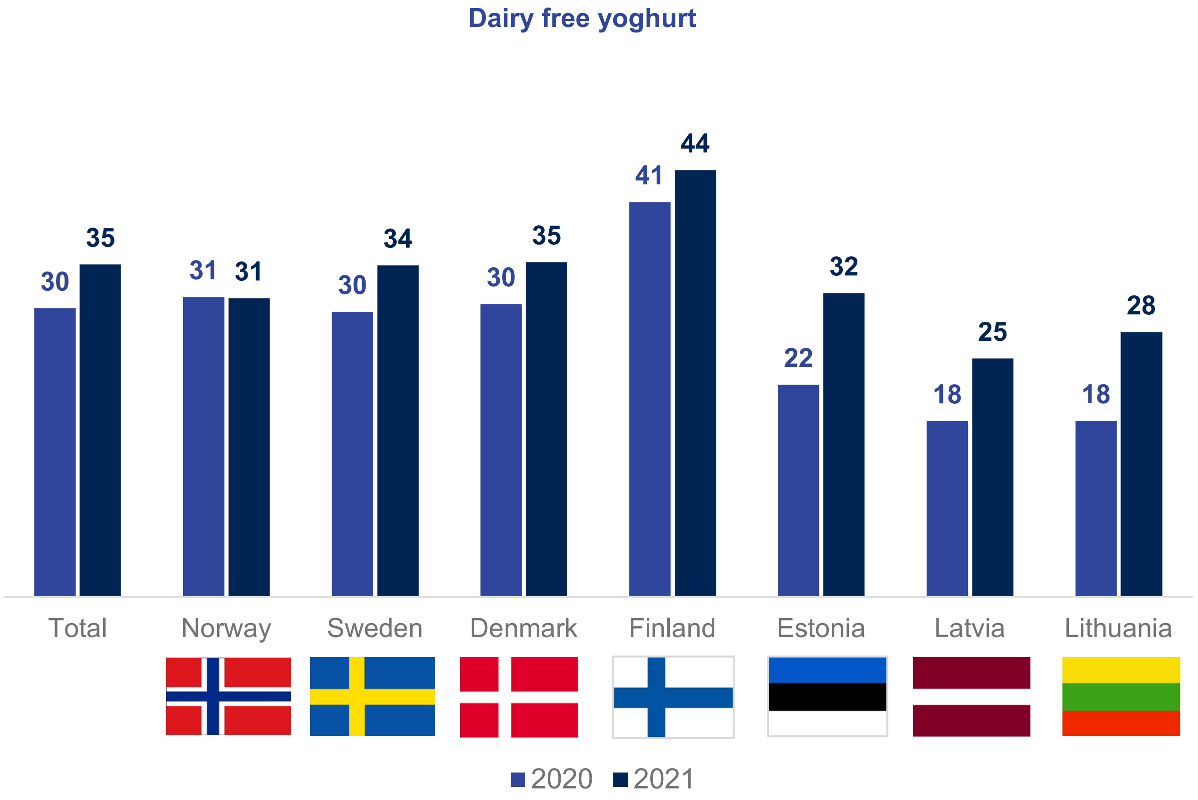
SHARE AMONGST ADAPTORS WHO PURCHASE DAILRY-FREE MILK MONTHLY OR MORE OFTEN



- Be aware that the base for this question are the ones that already have said that they have purchased this vegan/vegetarian alternative, and these percentages reflect the share that actively continue to buy this type of product on at least a monthly basis. The remaining share have then either just tried it or buy it rarely.
- Earlier we saw that the milk category had grown quite a bit. This shows us that there is a large jump for most countries in active for these dairy free milk alternatives. Especially the Baltics see large jumps in monthly consume.

Base: have purchased **Dairy free milk, N2021=1731, N2020=1540**
Q4_10b. How often do you purchase these products?

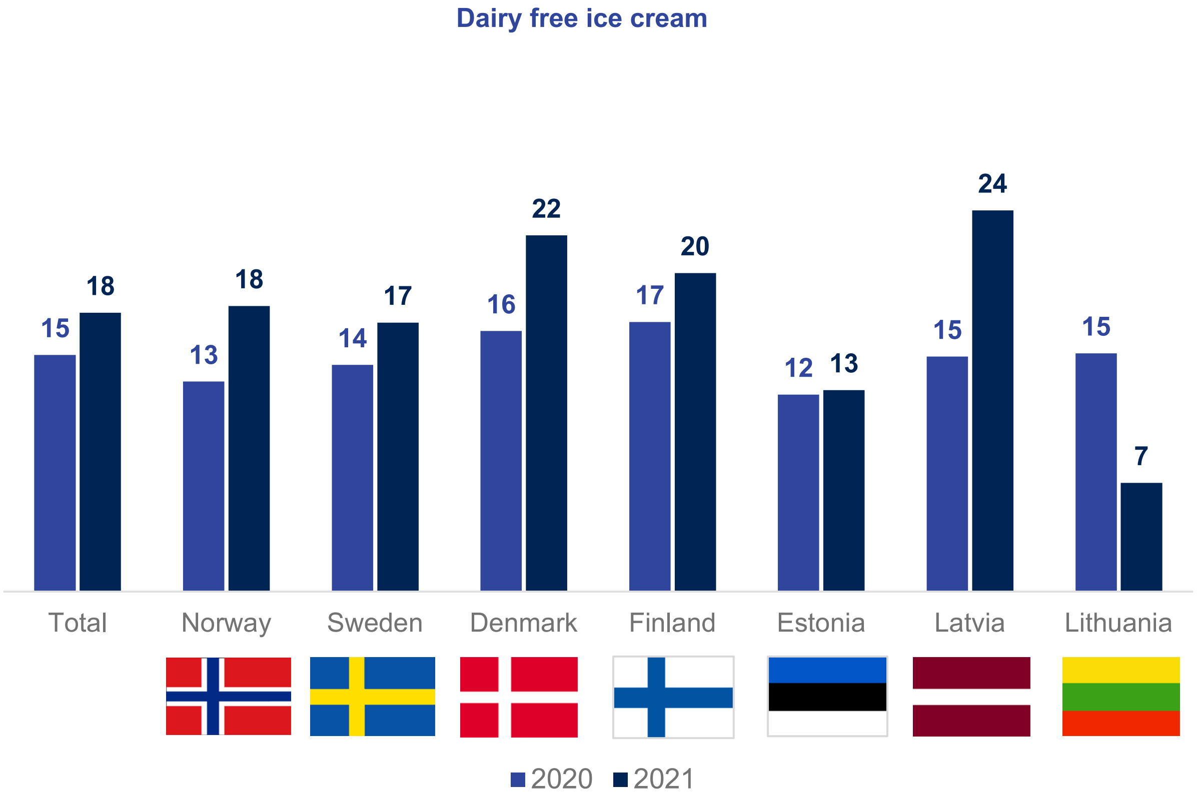
SHARE AMONGST ADAPTORS WHO PURCHASE DAILRY-FREE YOGHURT MONTHLY OR MORE OFTEN



- Be aware that the base for this question are the ones that already have said that they have purchased this vegan/vegetarian alternative, and these percentages reflect the share that actively continue to buy this type of product on at least a monthly basis. The remaining share have then either just tried it or buy it rarely.
- 41% of consumers in Finland buys dairy free yoghurt monthly, 20% - weekly.

Base: have purchased **Dairy free yoghurt, N2021=1084, N2020=974**
Q4_10b. How often do you purchase these products?

SHARE AMONGST ADAPTORS WHO PURCHASE DAILRY-FREE ICE CREAM MONTHLY OR MORE OFTEN



- Be aware that the base for this question are the ones that already have said that they have purchased this vegan/vegetarian alternative, and these percentages reflect the share that actively continue to buy this type of product on at least a monthly basis. The remaining share have then either just tried it or buy it rarely.
- In age group of 18-29 year is monthly purchase (20%) higher that in other sub-groups.

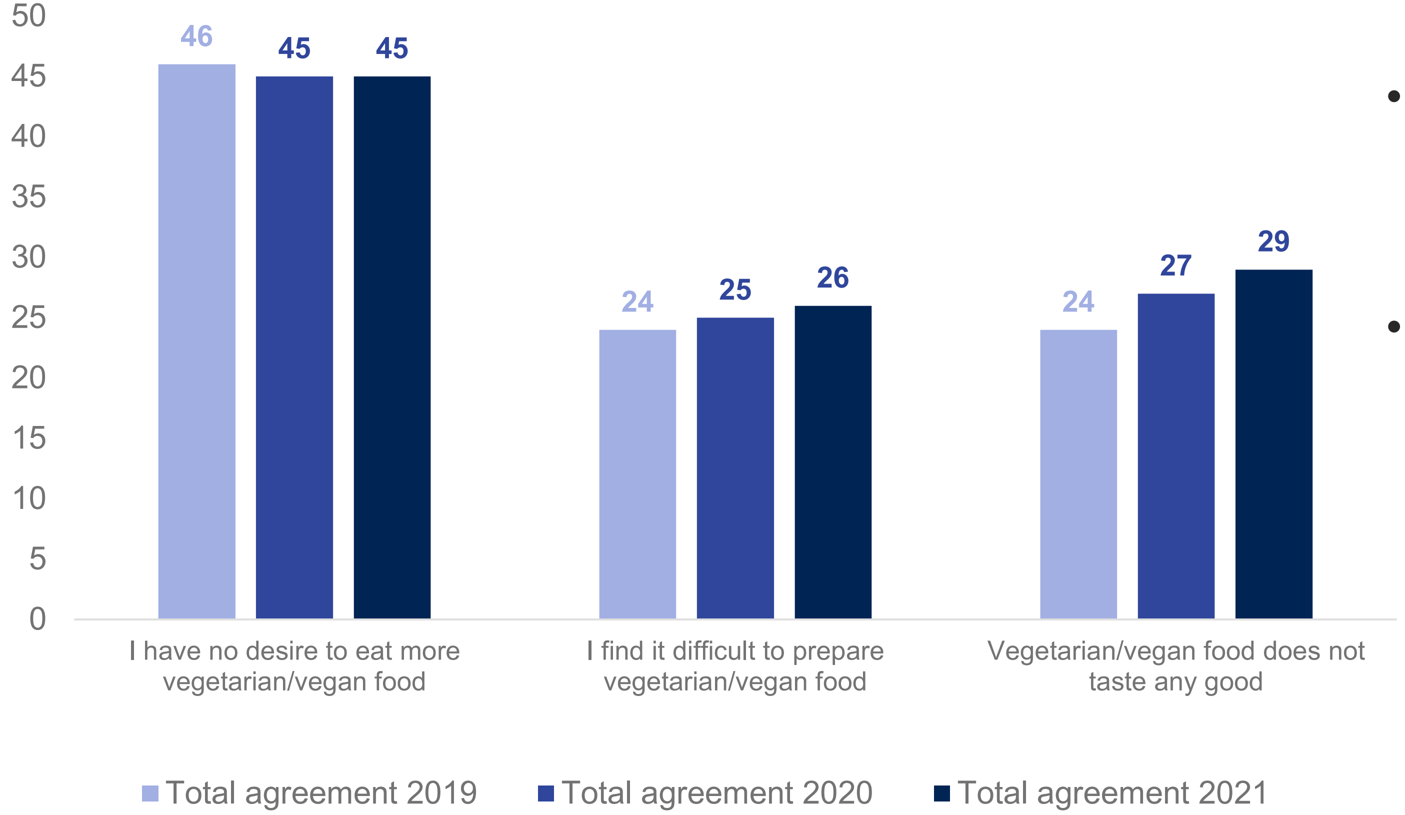
Base: have purchased **Dairy free ice cream, N2021=1362, N2020=1271**
Q4_10b. How often do you purchase these products?

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

- I have no desire to eat more vegetarian/vegan food
- I find it difficult to prepare vegetarian/vegan food
- Vegetarian/vegan food does not taste any good
- It takes too long to prepare vegetarian/vegan food
- Vegetarian/vegan food offers too little variation

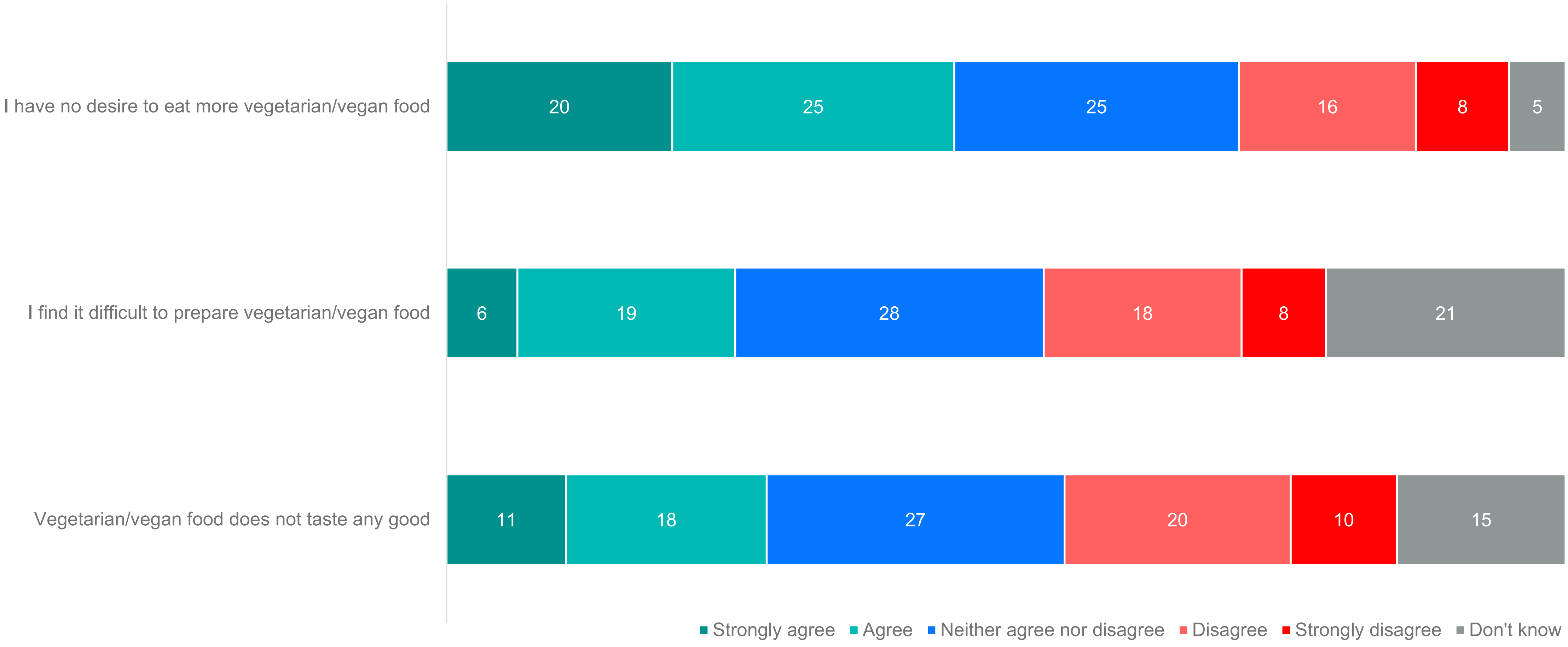
Scale 1-5

GROWING NUMBERS OF PEOPLE SAYING VEGAN/VEGETARIAN FOOD IS DIFFICULT TO PREPARE AND DOES NOT TASTE GOOD



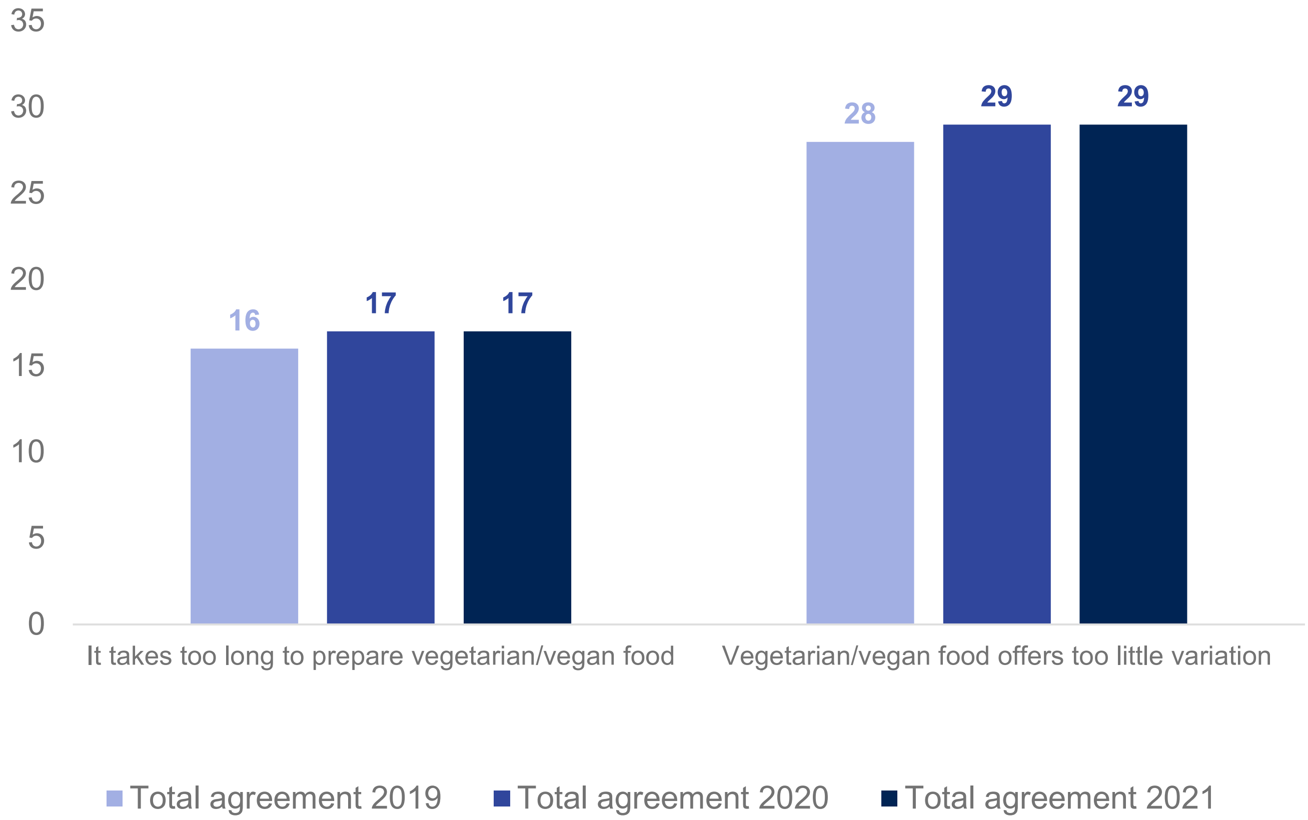
- 45% of the respondents have no desire to eat more vegetarian/vegan food.
- Another year, another percentage point up. 26% now agree that they find it difficult to prepare vegan/vegetarian food.
- And with an even faster steady growth, landing at 29% this year, consumers say that vegetarian/vegan food does not taste any good. This could be attributed to the category exploring alternative products that have yet to be favored by the consumers.

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



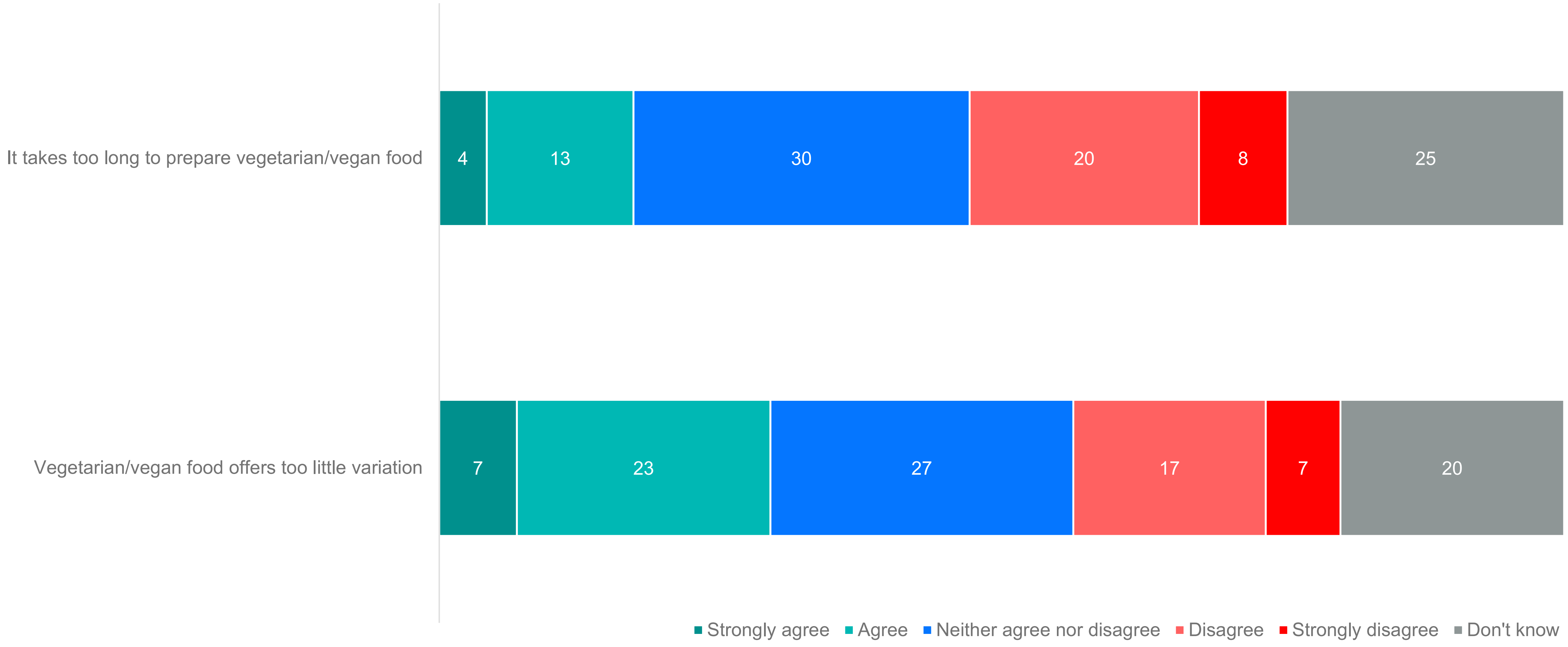
Base: All, N=7000 (1000 pr. country)
Q4.11 To what extent do you agree or disagree with these statements?

NO DIFFERENCES FROM LAST YEAR, A MINORITY FIND VEGAN/VEGETARIAN ALTERNATIVE TO TAKE TOO LONG TO PREPARE, AND OFFERS TOO LITTLE VARIATION



- There is still 17% who feel that it takes too long to prepare vegetarian food. Not change from last year.
- 3 out of 10 agrees with the statement that vegetarian/vegan food offers too little variation. This has also not changed the last year.
- While these are minorities in our sample, these are still significant barriers for a group of millions of potential consumers.

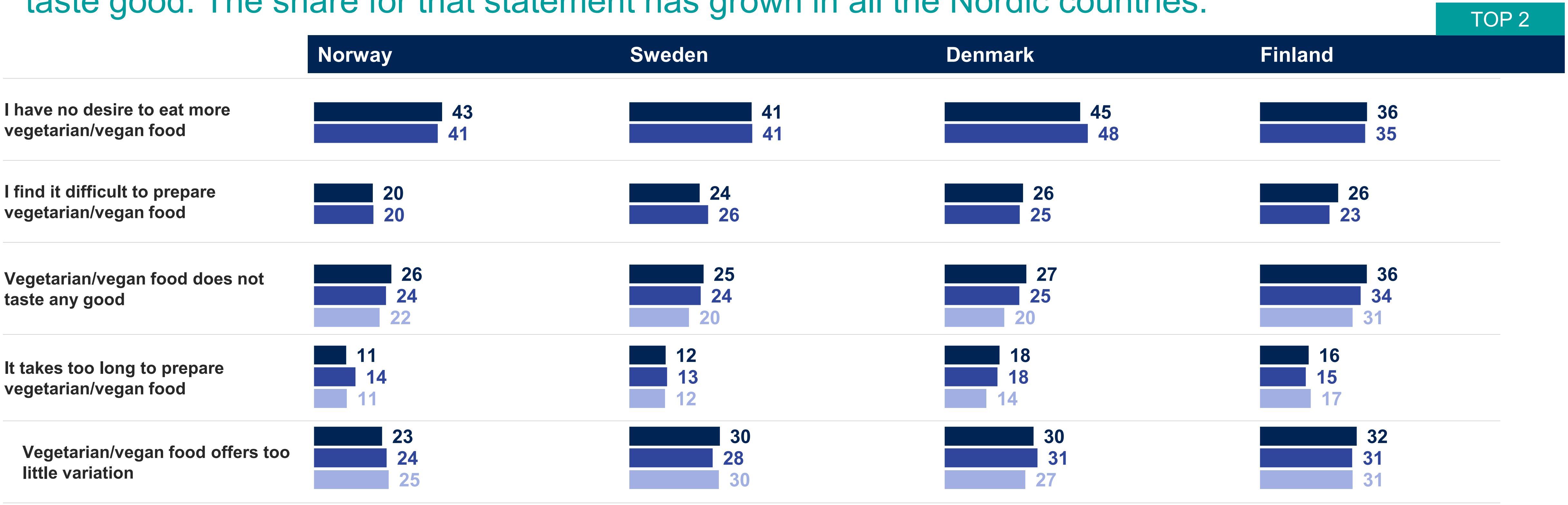
Base: All, N=7000 (1000 pr. country)
Q4.11 To what extent do you agree or disagree with these statements?



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

THE NORDICS

Finland has the highest shares that agree with the statement that vegetarian/vegan food does not taste good. The share for that statement has grown in all the Nordic countries.

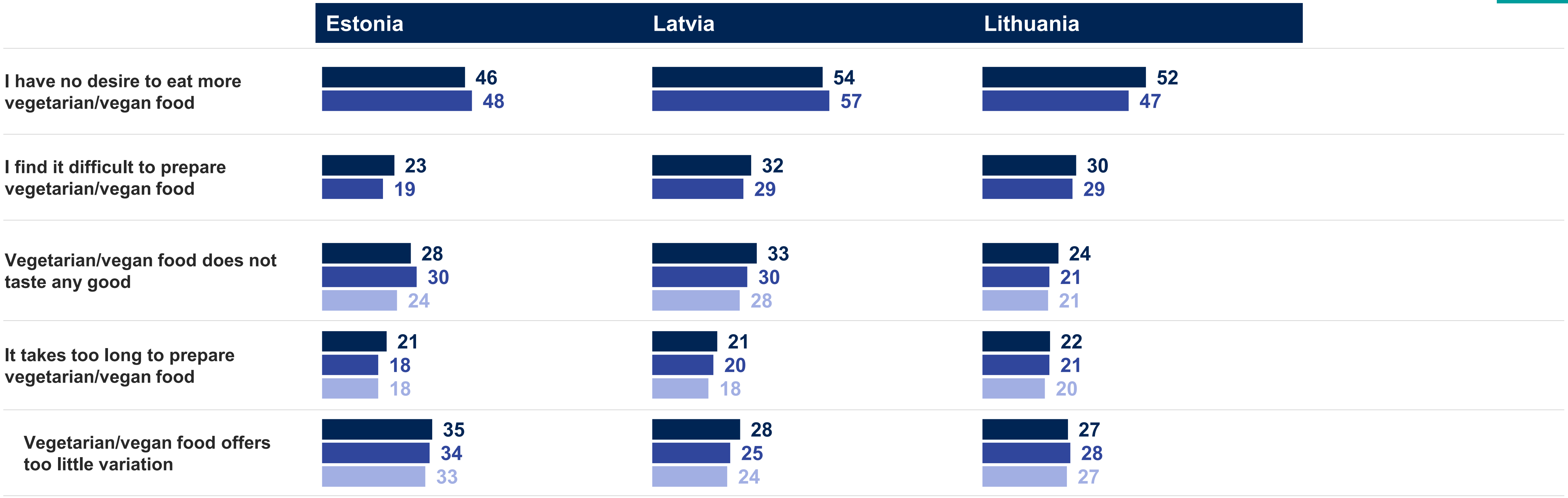


Base: All, N=7000 (1000 pr. country)
Q4_11. To what extent do you agree or disagree to these statements?:

THE BALTICS

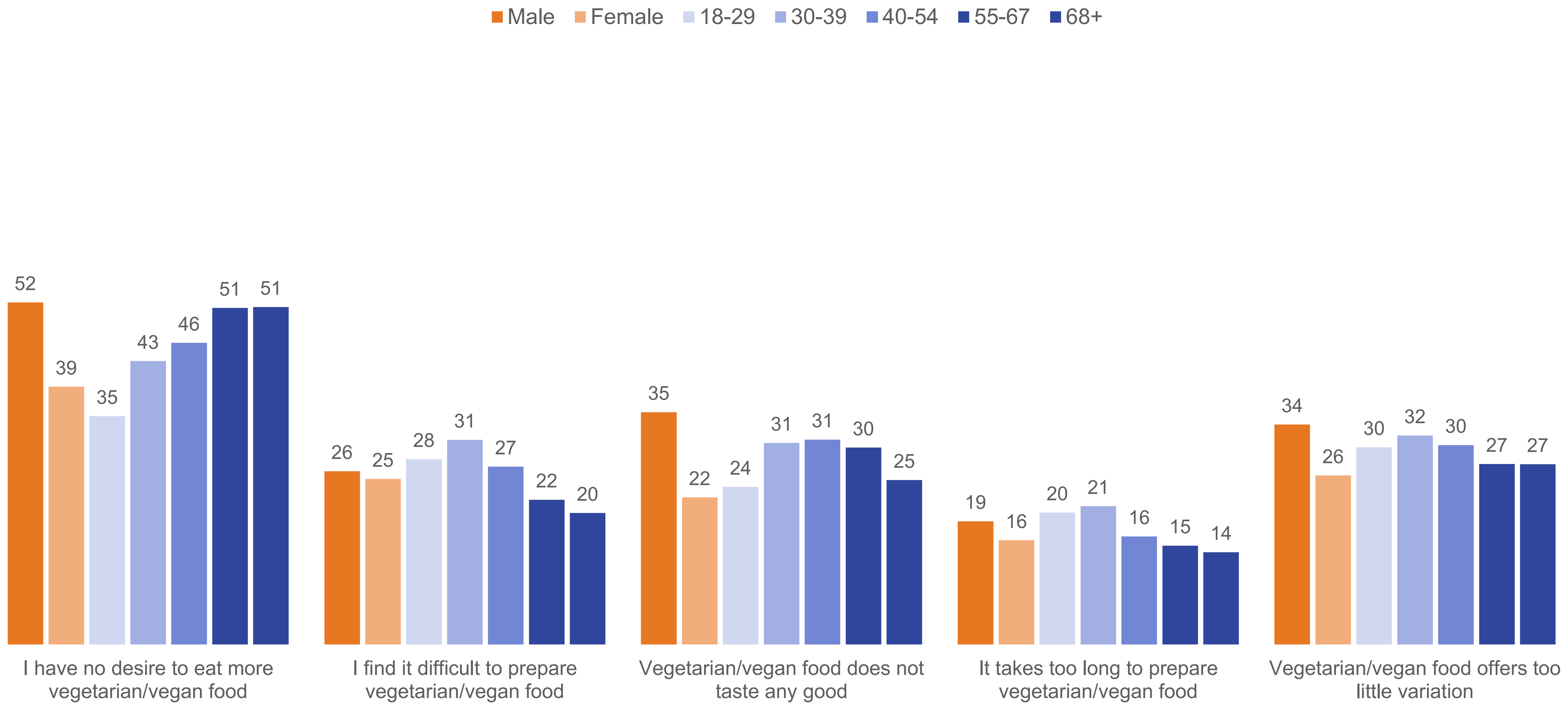
In the Baltic countries we se a bit higher shares of those who don’t have a desire to eat more vegan/vegetarian food. Latvia is on top, but decreased from last year. Lithuania with the highest growth in the same group.

TOP 2



Base: All, N=7000 (1000 pr. country)
Q4_11. To what extent do you agree or disagree to these statements?:

DEMOGRAPHIC BREAKOWN

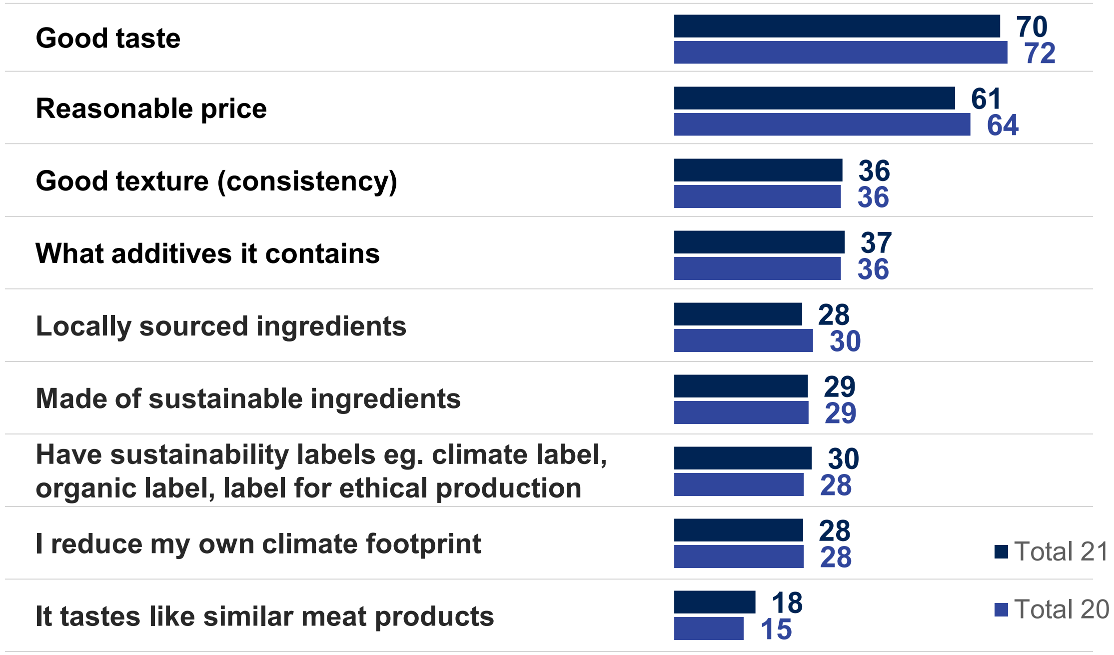


Base: All, N=7000 (1000 pr. country)
Q4_11. To what extent do you agree or disagree to these statements?:

What is most important for you when you are buying plant-based products?

- Good taste
- Reasonable price
- Good texture (consistency)
- What additives it contains
- Locally sourced ingredients
- Made of sustainable ingredients
- Have sustainability labels eg. climate label, organic label, label for ethical production
- I reduce my own climate footprint
- It tastes like similar meat products

TASTE AND PRICE MOST IMPORTANT FACTORS WHEN BUYING PLANT-BASED PRODUCTS

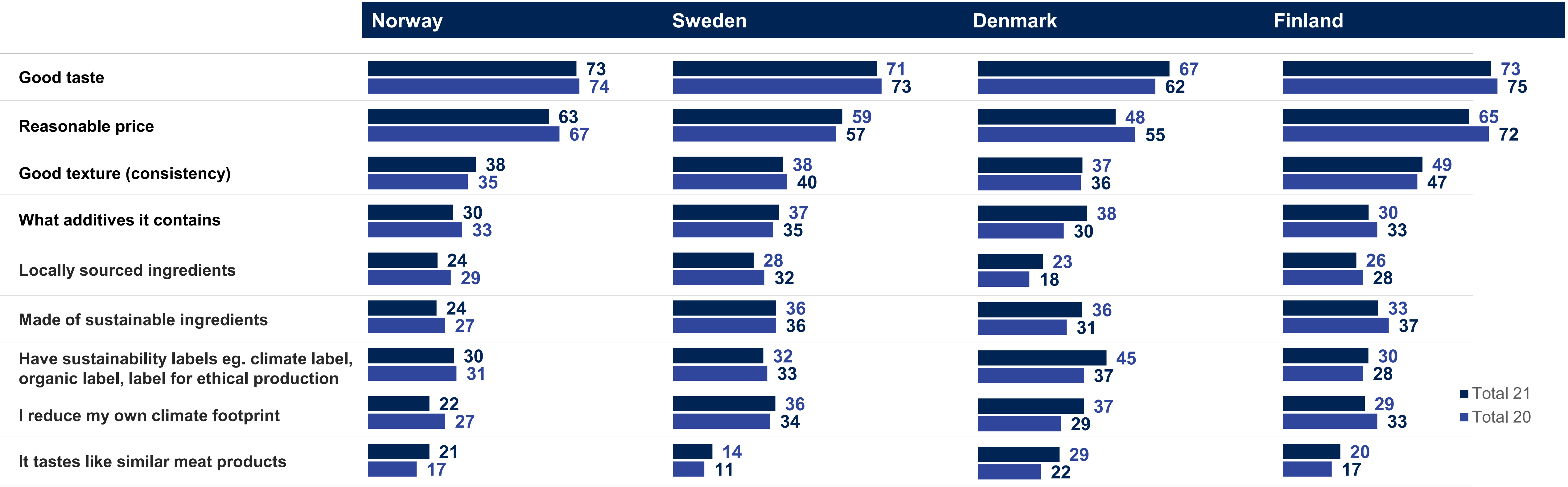


- Good taste is by far the most important factor when buying a plant-based product, This has had a decrease of 2pp the last year.
- Pricing is not far behind taste and thus clearly a major driver in this marked. It also drops significantly this year though.
- What seems to get a lift this year are points derived from sustainability needs, focus on additives and that the predicts taste like its animal-based counterpart.

Base: Buys vegetarian food daily-sporadically, Total=2512, NO=335, SE=504, DK=293, FIN=519, EE=295, LV=234, LT=332
Q4_12. What is most important for you when you are buying plant-based products?

THE NORDICS

Denmark and Finland sees a significant decrease in people stating that reasonable price is an important factor when buying plant-based products. Demark sees a big increase for a lot of the alternatives.

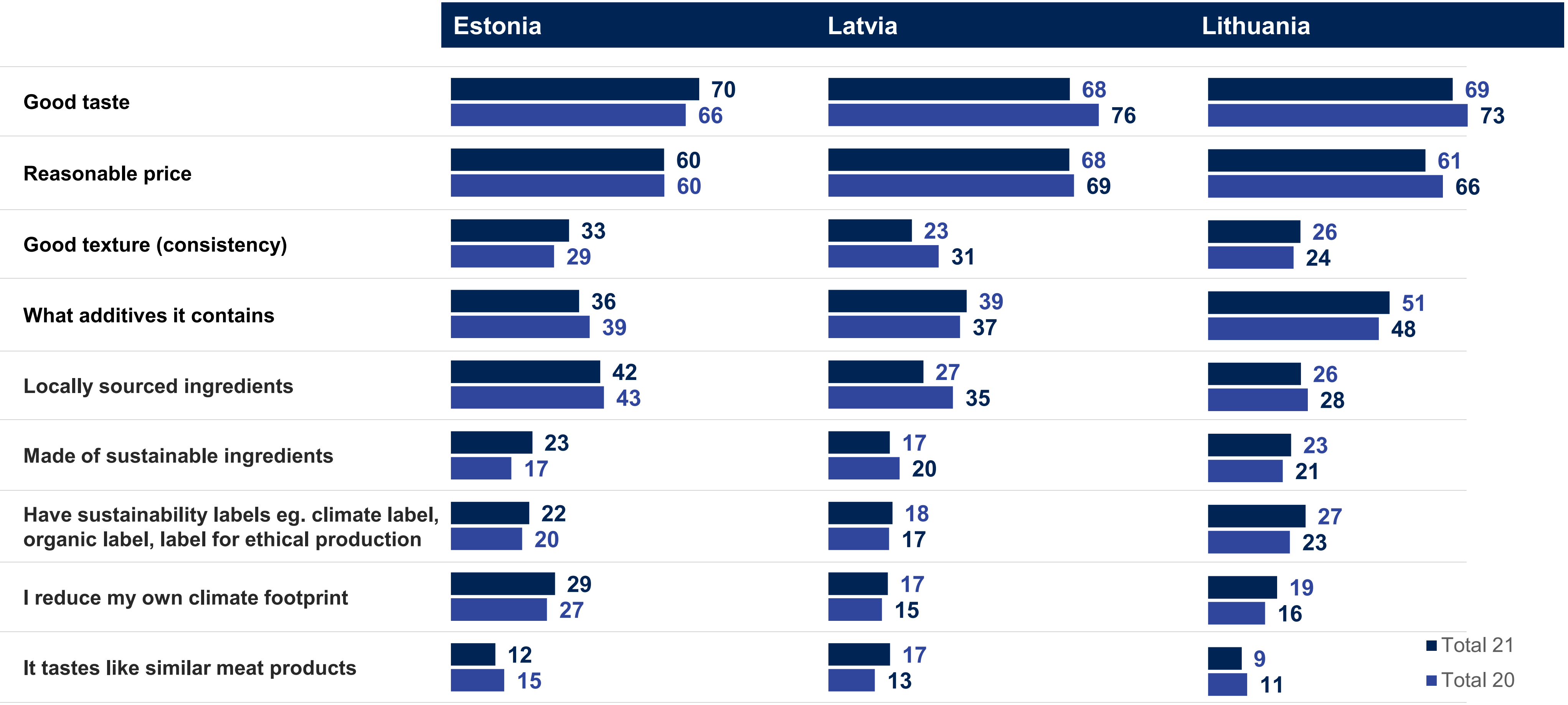


Base: Buys vegetarian food daily-sporadically, Total=2735, NO=348, SE=538, DK=352, FIN=536, EE=316, LV=283, LT=362

Q4_12. What is most important for you when you are buying plant-based products?

THE BALTICS

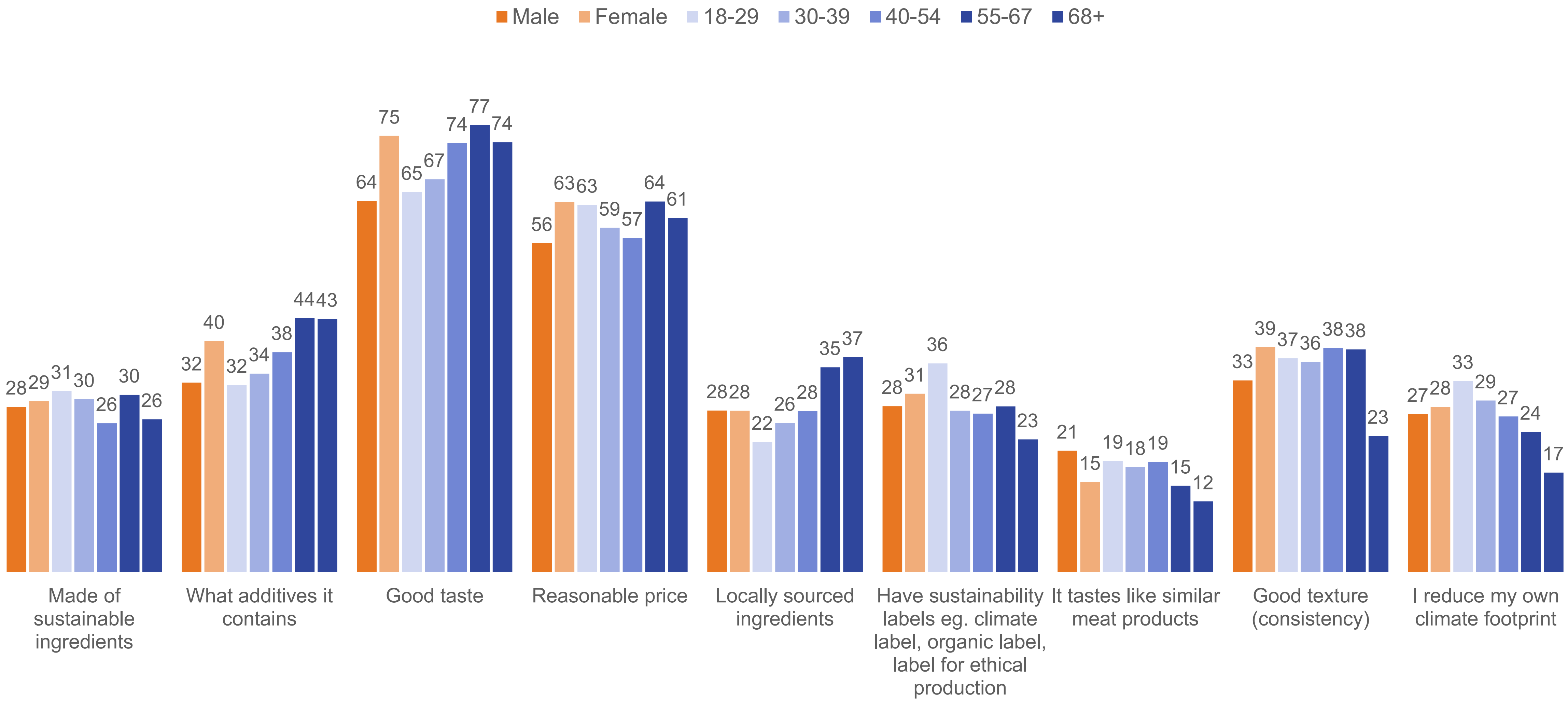
"Good taste" has dropped significantly in Latvia. Lithuania, however, has a much higher importance for which additives the food contains than the other countries, including the Nordics.



Base: Buys vegetarian food daily-sporadically, Total=2735, NO=348, SE=538, DK=352, FIN=536, EE=316, LV=283, LT=362

Q4_12. What is most important for you when you are buying plant-based products?

DEMOGRAPHIC BREAKOWN



Base: Buys vegetarian food daily-sporadically, Total=2735, NO=348, SE=538, DK=352, FIN=536, EE=316, LV=283, LT=362

Q4_12. What is most important for you when you are buying plant-based products?

THANK YOU!

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