

Tackling industrial meat:

Understanding public attitudes, concerning issues and impactful solutions

Quantitative Insight Report

Brazil, France, Germany, UK and USA

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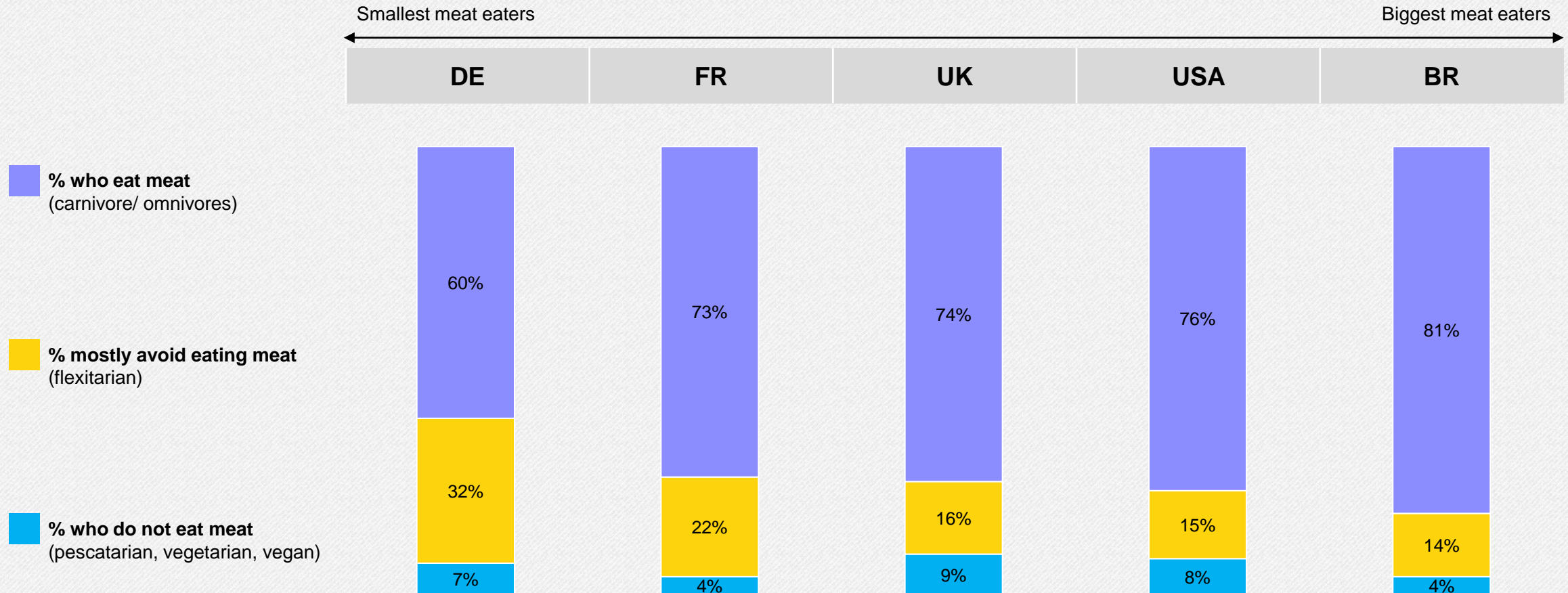
Methodology

- This research was conducted in five key meat markets: the US, the UK, Germany, France and Brazil.
- The total sample size was 7,508 adults: ~1,504 in each market and is nationally representative.
- Fieldwork was undertaken between 26th September and 11th November 2022. The survey was carried out online.
- The figures are representative of adults (aged 18+) in each market.

Meat consumption habits and attitudes

Meat consumption is high in all markets – 3 in 4 people are carnivores.

But a significant minority are flexitarian – almost a third in Germany and a quarter in France.



Flexitarians are on the rise. Despite high consumption levels, meat eaters in all markets intend to cut down on meat in the next 2 years.

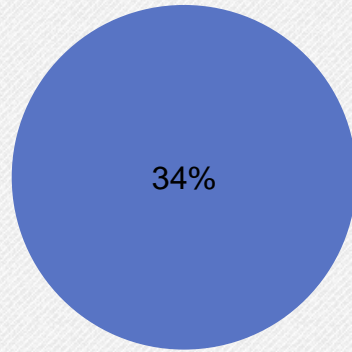
This is highest in Germany and lowest in the US.

■ % who intend to reduce meat consumption



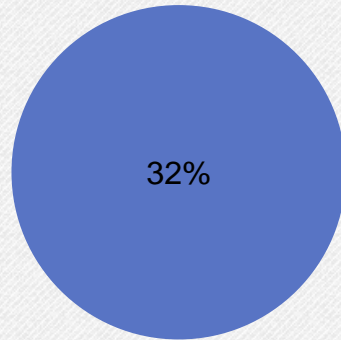
People don't want to cut down on meat because it's necessary for health and it's nice to eat.

■ % stating reason for being reluctant to cut down meat consumption (globally)



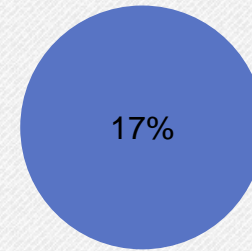
It's necessary

(eating meat has essential nutrients for our health)



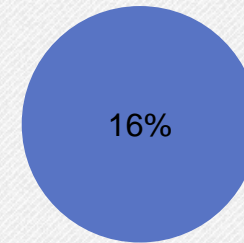
It's nice

(eating meat is pleasurable)



It's normal

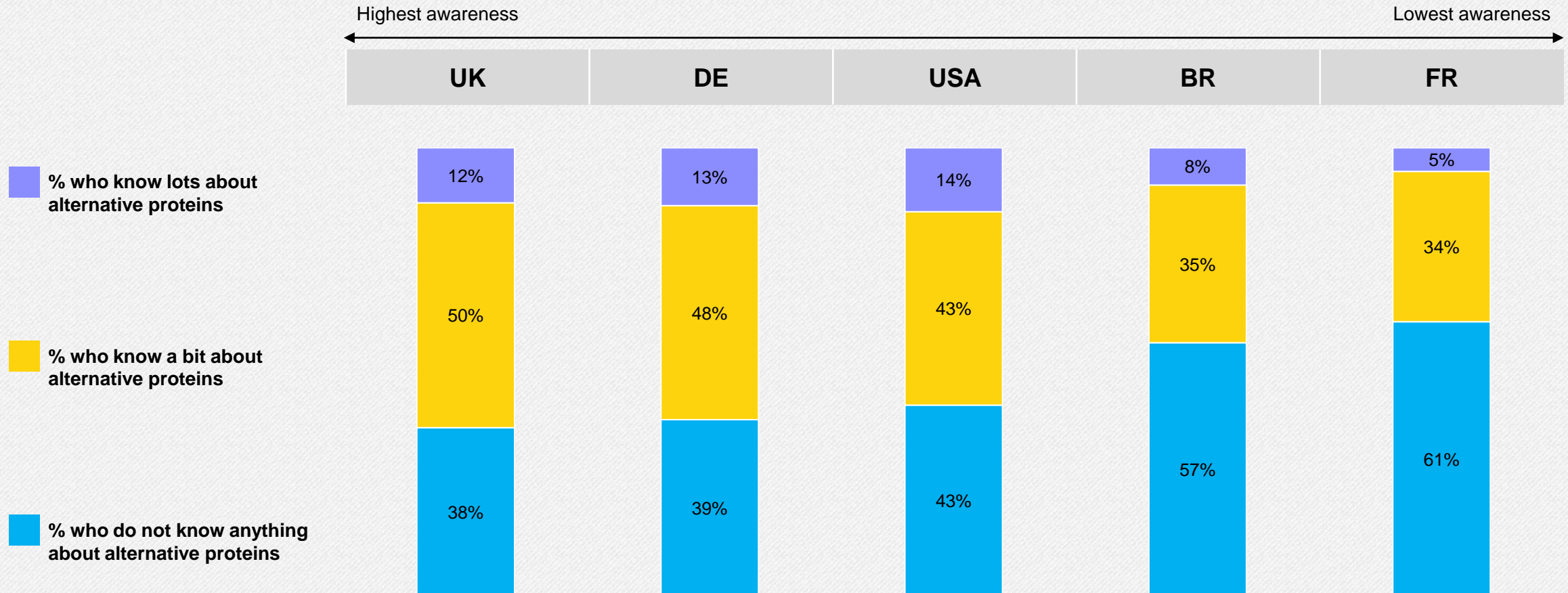
(most people eat meat; it's available everywhere)



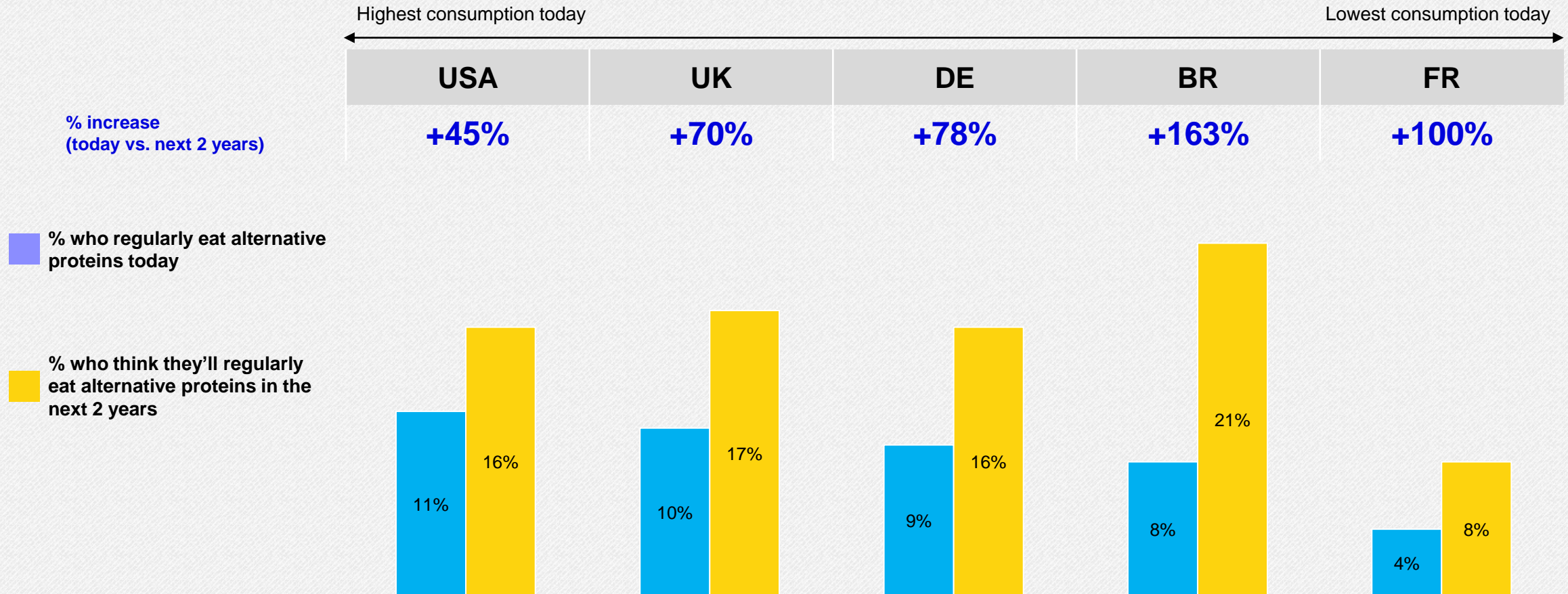
It's natural

(humans have been doing it forever)

There's a lack of awareness around alternative proteins.



There's little regular consumption of alternative proteins today. Intention of eating alternative proteins will double in France and triple in Brazil in two years, reaching 10-20% market share across all countries.



The main barrier to alternative proteins is taste, followed by the fact that it's not seen as 'natural' vs. meat, and thirdly price. Not knowing where to buy AP from is a big barrier in Brazil.

	USA	UK	DE	FR	BR
It doesn't taste as nice as meat	50%	56%	52%	44%	32%
It's not as 'natural' as meat is	36%	36%	39%	53%	23%
It's too expensive	30%	29%	38%	20%	28%
It's not as nutritious as meat	19%	22%	19%	14%	12%
I don't know where to buy it from	9%	10%	10%	15%	30%

Relative importance of different public concerns and priorities across markets

Cost of living is the primary concern in all markets, especially in the UK. Climate change is a secondary concern.

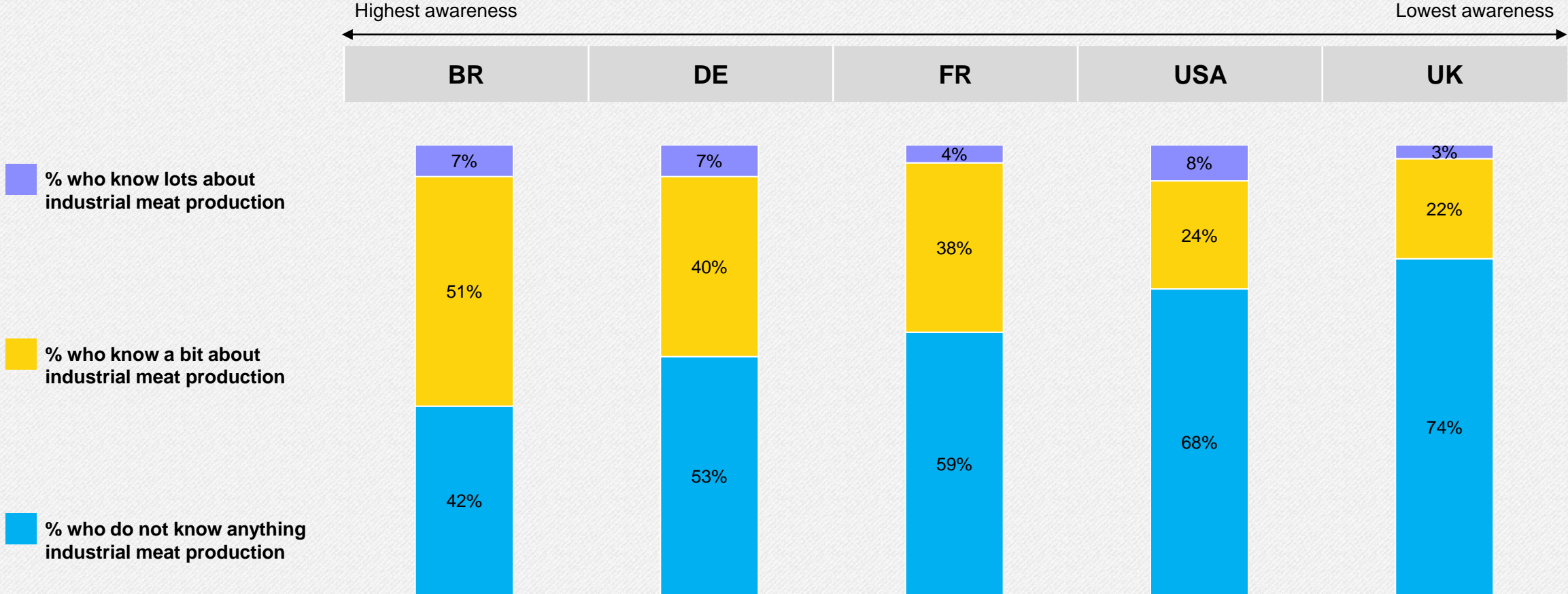
<i>% ranked 1st (most concerning)</i>	USA	UK	DE	FR	BR
The cost-of-living crisis/inflation	31%	43%	28%	28%	23%
The visible effects of climate change	11%	8%	14%	15%	10%
Current and future global conflicts/wars	5%	7%	15%	17%	14%
A loss of trust in the government	12%	12%	10%	8%	10%
Future pandemics	8%	4%	7%	5%	15%
The possibility of a global recession	7%	6%	6%	5%	7%
High levels of immigration	6%	5%	7%	6%	1%

Consumers are most concerned with financial security and personal health, less so about protecting the environment or animal welfare.

<i>% selected in top 3 (most important)</i>	USA	UK	DE	FR	BR
Being financially secure	44%	54%	58%	44%	43%
Keeping fit and healthy	34%	46%	53%	48%	40%
Having a positive attitude	38%	39%	38%	29%	26%
Protecting the environment	19%	25%	30%	39%	29%
Protecting animal welfare	15%	19%	27%	26%	20%
Being successful	23%	16%	13%	28%	16%
Helping others before myself	23%	26%	14%	14%	19%
Learning new skills	20%	18%	16%	15%	22%
My faith/spirituality	30%	11%	9%	8%	37%

Levels of awareness, understanding and concern towards industrial meat production

There is little awareness of industrial meat across markets, with higher awareness in Brazil.

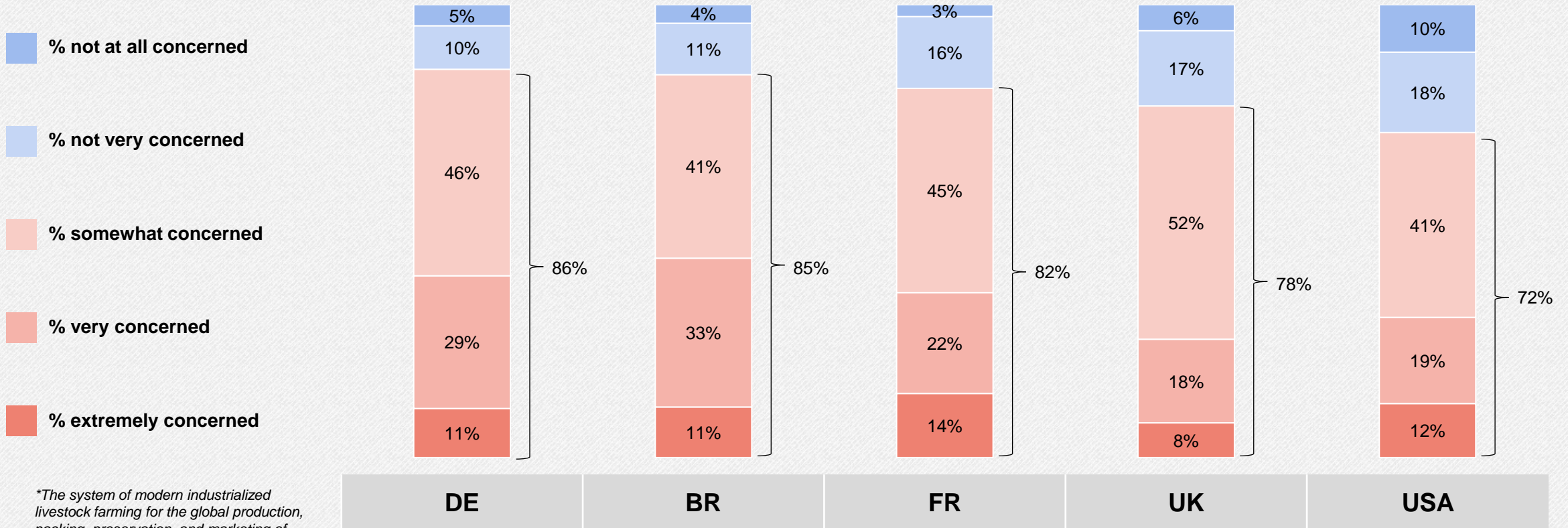


Industrial meat is currently not seen as a key cause of global warming, despite driving more emissions than all cars in the world.

■ Biggest contributor
 ■ Smallest contributor

% ranked 1st (biggest contributor)	USA	UK	DE	FR	BR
Fossil fuels (coal, oil and gas)	21%	28%	18%	18%	19%
Deforestation	12%	14%	19%	18%	33%
Cars	12%	8%	9%	8%	9%
Overpopulation	9%	9%	10%	9%	4%
Overuse of plastics	7%	9%	4%	10%	7%
Aviation (airplanes)	3%	6%	11%	8%	2%
Chemicals manufacturing	10%	5%	4%	5%	8%
Overconsumption of goods	4%	4%	5%	6%	2%
Industrial meat	3%	3%	6%	3%	3%
Energy inefficient buildings	4%	2%	1%	3%	2%

But, when a definition* is provided, a majority of people in each market are at least somewhat concerned with the impact of industrial meat. Strong concern is higher in Brazil and Germany.



**The system of modern industrialized livestock farming for the global production, packing, preservation, and marketing of meat such as beef, pork and chicken.*