



## Compassionate Consumption: How Veganism is Taking Over Mainstream Europe



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Counterpoint is a cultural and social risk consultancy. Our main aim is to address the shortcomings of traditional forecasting tools as they fail to keep up with a number of growing trends. Amongst these are the rapidity of change, the demands for immediacy and transparency, public distrust of expertise and the resulting volatility and complexity of the environment in which decisions need to be taken.

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## 1. Executive Summary

As diverse as it is interconnected, Europe is taking on plant-based eating with a cross-continental wave of enthusiasm — increasingly mainstream in some places, niche in others — for the benefits to animals, the planet and people themselves. From celebrities turning vegan across the globe, to traffic on Facebook and Instagram showing enticing meals from the young and fit, there is a rebranding of the movement as chic and healthy.

Plant-based diets are spreading throughout Europe, in different countries at different rates, and with mixed receptive audiences. This emerging trend is seeing a culturally diverse Europe find ways to adapt traditional cuisine to a growing market of vegans. Counterpoint gathered illustrative data on how European countries take up this trend differently.

We found that Northern Europeans accept the rising trend with enthusiasm, and mainstream consumers are increasingly educating themselves with regard to plant-based eating. While vegans in the UK are eager to craft a mainstream image for the diet and export the Vegan Society stamp, Germany is revolutionizing plant-based shopping across the continent with all-vegan supermarkets. Southern Europe is witnessing a rise in *flexitarians* who do not espouse veganism entirely but show interest in plant-based products and reducing meat and dairy consumption.

Strict veganism still comes with a stigma. A notable exception, home to an immense, multi-generational population of vegans, Italy is focusing on fresh, local produce and plant-based options in both rural and urban environments.

Why do people choose a vegan lifestyle? The majority of Europeans transitioning to plant-based diets renounce animal products for ethical reasons, however for some, health and fitness benefits are the primary draw. Our research found the movement most common among women and the 15-34 age group. A strong emphasis is on ethical motivations in the sense of animal rights, as a primary catalyst to begin a plant-based diet, with environmental and health as secondary reasons to stay with the diet. As one vegan chef pointed out, once interested in one of these three motivations for beginning a plant-based diet, individuals quickly discover the other two. Environmental concerns associated with the agriculture industry and trophic efficiency laws proved a strong motivation to reduce meat and dairy consumption, but not powerful enough to eliminate these products entirely. Environmental concerns, however, were much more common among vegans as secondary motivations alongside animal rights beliefs.

How stable is this trend? Counterpoint found that the movement has grown in part because of key documentaries addressing the main arguments for becoming vegan: animal ethics, environmental concerns, and health benefits. These tipping points do not fundamentally shift the trend towards plant-based eating, but rather give self-perpetuating movement bursts of energy. As traffic increases on the web and social media, more Europeans are renouncing animal products and sharing information within their social circles. Interest in veganism in a case study of eight European countries has shown exponential growth across the board, with the release of a key documentary only hastening the rate of growth, rather than prompting momentary spikes. This indicates the plant-based movement will expand and endure.

Meanwhile a declining dairy industry is met with formidable price competition, monopolization among large producers and increased pressure from a vegan movement fervent about exposing the realities of agricultural conditions. The result: A diversification of accessible products for an increasingly ethical and health-conscious consumer population — and a burgeoning of tantalising, nutritious recipes on vegan blogs and social sites.

*Bon appetit!*

## 2. View from a VegFest by the Sea

A pleasant day in Brighton and a chill coastal wind drafting in the succulent aromas of festival food: a curious mélange of dairy free strawberry banana crêpes, coconut cheese chips and seitan sausages.

Thousands crowded into the Brighton Centre for the city's annual *VegFest* — a celebration of veganism featuring cooking demos from fit life coaches or renowned chefs, talks on vegan society and animal rights, and a line-up of entertainment and stands selling products covering everything from coats to cosmetics.

The event catered to all the usual cast of counter culture enthusiasts: spiky haired teenagers, lanky cross-dressers, and plaid-wearing hipsters crowded into the performance halls to catch their favourite vegan comedian or folk band.

But Brighton also welcomed mothers sharing veggie burritos with small children, fitness enthusiasts browsing plant-based protein powders, and young professional couples comparing cruelty free deodorants — a convivial crew happy to share space with visitors of all different ages, ethnicities, backgrounds, walks of life and stylistic expressions; Provided there were still mock Chinese pork buns a-plenty.



*Brighton VegFest participants from all walks of life browse cruelty-free merchandise. Teen VGN.*

That weekend, veganism took over the town.

In fact, the trend is taking hold in more than this hip, coastal city an hour outside of London. Plant-based diets are sweeping Europe and becoming the new mainstream. In the last two years alone, veganism has gone from a gradually progressing diet to an exponentially growing craze. In the last

decade, the UK alone reported an astonishing 350% growth in vegans — taking the number to more than half a million British vegans.

“I would hope that in the next few years, [veganism] will be where vegetarianism is now if not stronger,” said Brian Jacobs, 60, founder of the *Vegan London* meet-up group. Jacobs, who is 27 years vegan, cited higher numbers of people pledging to take the *PETA 30 Day Vegan Challenge*<sup>1</sup> and a burgeoning of vegan restaurants and grocery products across Europe. “When that’s happening, other organizations and other restaurants want to jump on board because they think they might be losing out.”

From the vegan bratwurst and schnitzel of Berlin to the wholesome hazelnut gnocchi of Tuscany, the eclectic cultures of Europe are finding innovative ways to assert themselves in the plant-based context. The cuisine has inspired delectable, and colourfully presented dishes such as egg-free crêpes, [grilled cauliflower with winter pesto](#) and cashew cream zucchini roll ups.

Plant-based eaters wish to be no longer seen as outsiders for eating ethically and health-consciously. More celebrities — such as Ariana Grande, Tobey Maguire and Bill Clinton — turn to the diet every year for its health and energy benefits, and win respect from fans for reducing their carbon footprints and renouncing suspect animal products. From under the limelight, theirs is a demonstration to mainstream society, of the correlations between plant-based eating on the one hand and health, beauty and performance on the other.

In an information age — with documentaries revealing atrocities of slaughterhouses and teenagers showing off their latest plant-based delicacies and slender, pimple-free forms on Instagram — consumers are confronted daily with the health and ethical benefits of reducing animal product consumption.

And with every major chain and indie city café offering a choice of whole, skim, 2%, soy, almond, coconut or hemp milk with their lattes — consuming dairy becomes a conscious choice, not an obvious necessity. For ethically minded vegans, there are simply no excuses anymore.

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<sup>1</sup> *PETA*: <https://secure.peta.org/site/Advocacy?cmd=display&page=UserAction&id=2055>

### 3. A Rising Trend – Vegan Takeover by Numbers

On the basis of our interviews with vegan organisations across Europe, articles in the media, Google Trends analysis and a study surveying 291 individuals who follow or are sympathetic to a plant-based diet all point to one truth — it appears that veganism is taking off with alacrity and [bursting onto the mainstream<sup>2</sup>](#).

Survey respondents ranged from ages 14-76, with a median age of 28, and came from every walk of life — including lawyers, psychologists, students, mothers working part time, teachers, dancers, veterinarians, pastry chefs, doctors, retired fire fighters, economists and police officers.

After answering identifying information, respondents were asked to select the single, primary factor that most influenced their change in diet. In the following question, they were allowed to check multiple options for motivations that helped them stay with their current diet.

Of respondents who described their diet as *vegan* (no animal products for lifestyle) or *plant-based* (no animal products in diet, but might wear leather or use cosmetics tested on animals), most cited animal ethics as the primary motivating factor to begin the diet, while health and environmental concerns featured prominently as secondary reasons to continue with the diet. While health was a driving factor for some (18.72%), environmental concerns were a more common secondary motivator, with 72 % saying environmental benefits and reducing carbon footprint added incentive for them to stay plant-based.

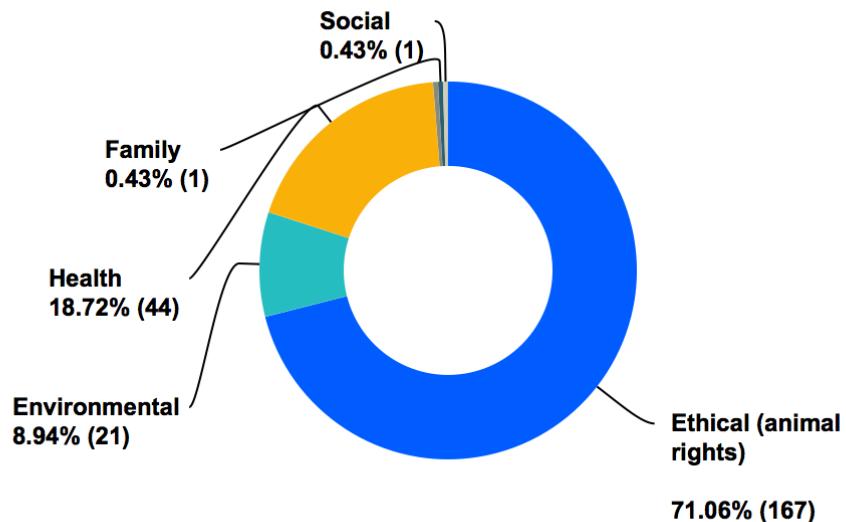
*'Most cited animal ethics as the primary motivating factor to begin the diet'*

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<sup>2</sup>*The Guardian*, 2016: <http://www.theguardian.com/lifeandstyle/2016/may/18/vegans-veganism-fit-macho-sexy-beyonce-ufc-fighters-wellness-bloggers>

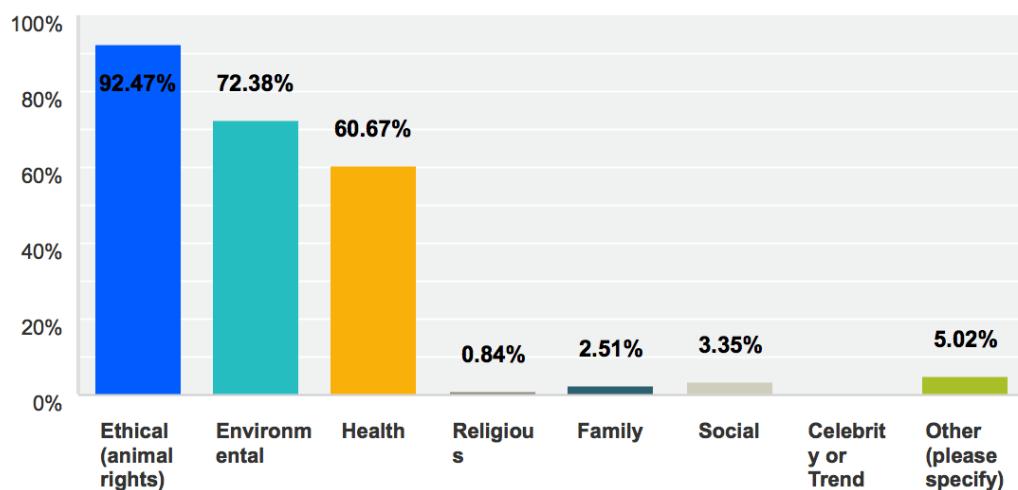
## When you started eating plant based, what was your primary motivation?

Answered: 235 Skipped: 4



## What are your primary dietary motivations now?

Answered: 239 Skipped: 0



*Motivations for following a diet for survey respondents who described their eating habits as 'vegan' or 'plant-based'. Respondents selected one primary catalyst (top), and then could check more than one option for motivations today (bottom).*

However, among respondents who try to reduce eggs and dairy but not cut them out completely, environmental reasons as the primary motivating factor showed nearly double the percentage, with 15% of respondents in that group.

This indicates environmental motivations are not powerful enough to convince people to eliminate animal products entirely, but they can serve as a compelling motivation to scale back, or as an extra incentive to remain on a vegan diet. For consumers who follow a strict plant-based diet, animal-rights based, ethical arguments are most crucial, but health concerns are also an important factor among the 45+ age group.

Other motivations included poverty arguments that suggest people would not go hungry if the world went plant-based and humanity more evenly distributed resources, as well as personal affirmations of spirituality and discipline.

Chef Rowena Humphreys, 35, who founded a plant-based coaching practice and supper club [V-Curious<sup>3</sup>](#) in London, commented that the diet is for all ages and that the motivations are mixed: as people start the diet for one reason, they quickly become aware of its other (health or environmental) benefits. An animal lover and environmental specialist, Humphreys also lauds veganism for its health benefits and assists hundreds of clients in managing weight and avoiding disease.

“My mother is my biggest achievement,” Humphreys said. “She grew up with a father who was a patissier. Three months after turning to a plant-based diet, she came off statins [a medication that lowers cholesterol in patients at risk of cardiovascular disease].”

A *Guardian* survey of 474 individuals (the survey was global but attracted mostly answers from the UK and Australia), found the movement to be driven by the young with 42% of vegans aged 15-34 and only 14% over 65.<sup>4</sup> Sixty five percent of our respondents fell in the 15-34 age range.

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<sup>3</sup>V-Curious : <http://www.v-curious.com/>

<sup>4</sup>The *Guardian*, 2016: <http://www.theguardian.com/lifeandstyle/2016/may/18/vegans-veganism-fit-macho-sexy-beyonce-ufc-fighters-wellness-bloggers>



*Teen VGN helps teenage vegans find community.*

But some respondents cautioned against associating veganism only with the young. One 59-year-old woman living in West Yorkshire wrote the following comment:

“Don’t underestimate the ability of older people to change their habits. I was 58 when I changed from veggie to vegan. Maybe even older people are able to, as we have the maturity to listen to the facts and appreciate the impact on health.”

The pool of survey respondents who described their diets as closer to vegan than pescetarian (vegetarian, plant-based etc.) was 87% female. But veganism is slowly shaking a longstanding perception that plant-based eating is not masculine with male vegan athletes, bodybuilders, actors, [YouTube bros](#) and chefs.

*‘Veganism is slowly shaking a longstanding perception that plant-based eating is not masculine’*

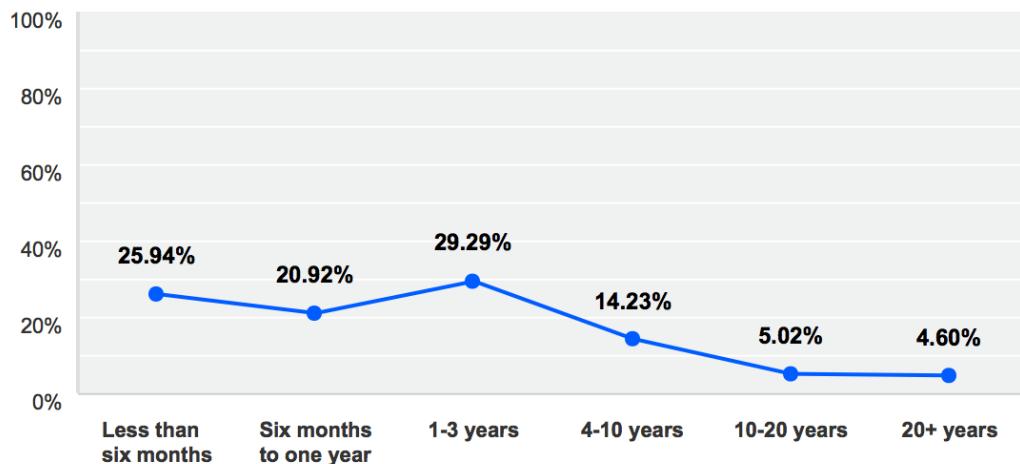


Bill Gates (top-left), David Haye (right) and Liam Hemsworth (bottom-left) are rebranding what it means to be vegan and male.

The length of time respondents reported following vegan or plant-based diets is shown in the graph below, and the data indicates this trend is new, yet sustained. People seem to be sticking to the diet, with comments about how veganism has improved their energy levels, weight management, skin and world outlook.

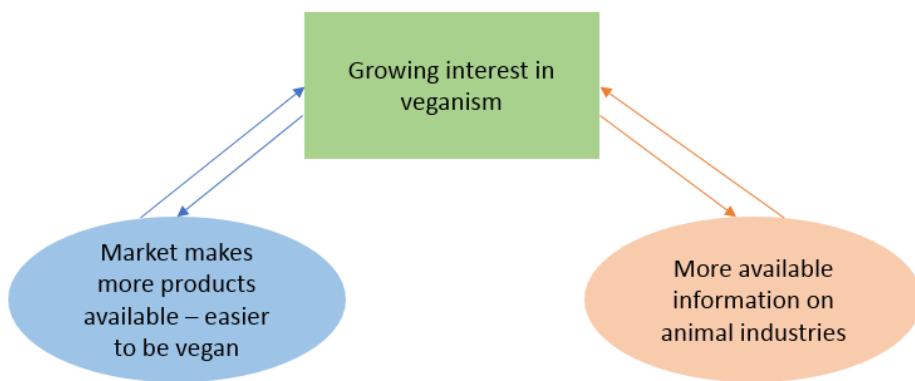
## How long have you eaten vegan or plant based?

Answered: 239   Skipped: 0



Trend analysis shows that veganism is modelling as a self-perpetuating diet that began a steady rise in 2011 and picked up additional momentum in 2015. As more information on animal industries and the health benefits of plant-based eating is available on the web, and a growing population of vegans prompt more alternative products on the market filling a growing demand, more people find veganism an appealing and accessible lifestyle choice — in turn, these recruits share more information about the diet on social media and fill a growing product demand, and the trend continues to escalate.

### Veganism: Growing, No Signs of Slowing



*Feedback loop for the availability of information and plant-based products indicates the trend will continue to grow.*

“The potential of vegan products is expanding beyond the small group of people who avoid animal products for ethical reasons to include the much larger base of consumers who go vegan for health reasons,” said Jennifer Valdés, a spokesperson for Germany’s all-vegan grocery store *Veganz*. “We also notice a rise in the numbers of flexitarians — people who adopt a plant-based diet with the occasional inclusion of meat. We see the trend of people eating less meat and add these consumers to the group of potential buyers for vegan products, and even big manufacturers start experimenting with meat-free product concepts.”

**Insights :  
A Rising  
Trend**

- Veganism is a recent and self-perpetuating trend.
- Animal ethics are the primary motivating factor for becoming vegan.
- Health and environmental concerns are strong secondary factors.
- There is also an increase in flexitarians – non-vegans interested in reducing consumption of animal products in favour of plant based alternatives.

#### 4. The United Kingdom – Making Veganism Mainstream

Home to more than 1489 vegan restaurants<sup>5</sup>, the late Donald Watson, who founded the movement and coined the term ‘vegan,’ and the oldest *Vegan Society* in the world —the United Kingdom sets the gold standard as a global beacon of veganism.

The community is strong, vibrant, and enthusiastic — eager to shed obsolete stereotypes and converge on the mainstream. When this study’s survey link first hit the major UK vegan Facebook pages, responses rose to 65 within the first three hours.

With an annual net migration of 333,000, the UK also welcomes thousands of vegans from Europe and abroad. Nearly one quarter of survey respondents living in the UK were expats from other European and global cities and half of those individuals were Italian.



*Lily Poveda, 45 emigrated from Cuba to London 22 years ago, became vegan one year later, and now helps manage Campbell's Canal Café a popular vegan café in Camden Town in London.*

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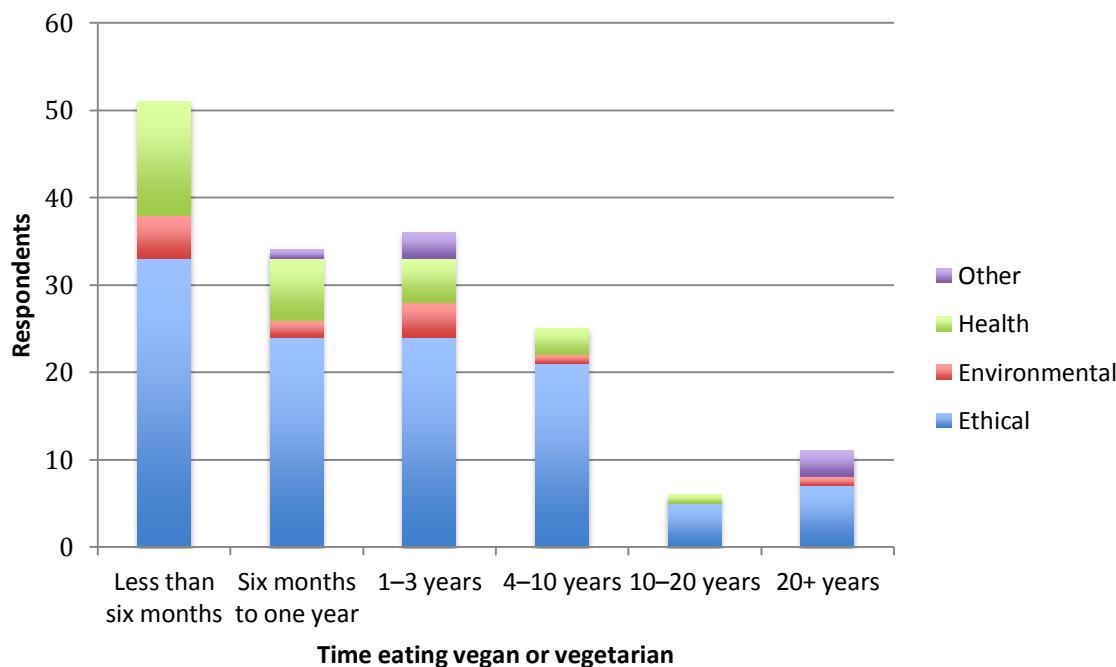
<sup>5</sup> Happy Cow UK restaurants for regions (not including ‘vegan-friendly’ restaurants) in the UK added up. *Happy Cow*: [www.happycow.net/europe](http://www.happycow.net/europe)

"The community is all-encompassing and welcoming," said Rowena Humphreys of *V-Curious*. "There are meet-up groups for gay vegans, vegan geeks, vegan music lovers, vegan games nights, you name it. It's super welcoming, very vibrant and getting bigger with a huge boom in events over the last three years, for example, trade fairs, and the UK market has expanded massively in terms of cheeses and chocolates."

Survey respondents living in the UK ranged from ages 15-67 with a median age of 29 and largely espoused veganism for ethical motivations, although environmental and health factors featured prominently as secondary concerns.

**[Vegans] largely espoused veganism for ethical motivations'**

## UK Dietary Motivations



*Our survey found driving factors towards veganism were mainly animal ethics, with a boom in health over the last year.*

Research commissioned by the *Vegan Society* in partnership with *Vegan Life* magazine estimated 542,000 people in Britain follow a plant-based diet — up 350% in the last decade — and an additional 521,000 of the UK's vegetarians would like to reduce consumption of dairy or eggs. These numbers show a dramatic increase since 2014, when the Vegan Society estimated the UK housed 150,000 full time vegans.<sup>6</sup>

British vegans tend to live in urban or suburban areas (88%) compared with rural (12%), and London is home to 22% of vegans living in the UK.<sup>7</sup>

<sup>6</sup>BBC, 2014: <http://www.bbc.com/news/magazine-25644903>

<sup>7</sup> ibid.

Jasmijn De Boo, CEO of the *Vegan Society* — the world's oldest vegan organisation, which produces the most respected and prevalent vegan product stamp — explained in a *Vegan Society* release that the sudden vegan craze in the UK springs from a combination of rationales:

“The positive portrayal in the media has contributed to [veganism’s] changing image; documentaries on the shocking realities and consequences of animal agriculture have gained prominence; delicious-looking vegan recipes have multiplied online and on social media as society becomes more health-conscious; and top vegan athletes keep proving that you can be fit and healthy on a plant-based diet.”<sup>8</sup>

*VegFest* events in Bristol, Brighton, London, and as of last year, Scotland attract steadily increasing numbers. After visiting the 2014 *VegFest* in London, 24% of non-vegans said they were considering going plant-based, whilst participants cited cheese as the most difficult item to give up.<sup>9</sup>

A 2014 study found Brits are increasingly receptive to trying plant-based products and sympathetic towards the ideals of veganism. Forty-eight percent viewed meat-free alternatives as eco-friendly, while 52% also think of them as healthier.<sup>10</sup>

With prevalent chain venues such as *Zizzi*'s offering [vegan pizza options](#), and *Costa Coffee* and [Brewdog craft beers](#) taking up the vegan trademark for products, veganism in the UK is becoming more visible and easier to follow than ever before.

***Veganism in the UK is becoming more visible and easier to follow.***

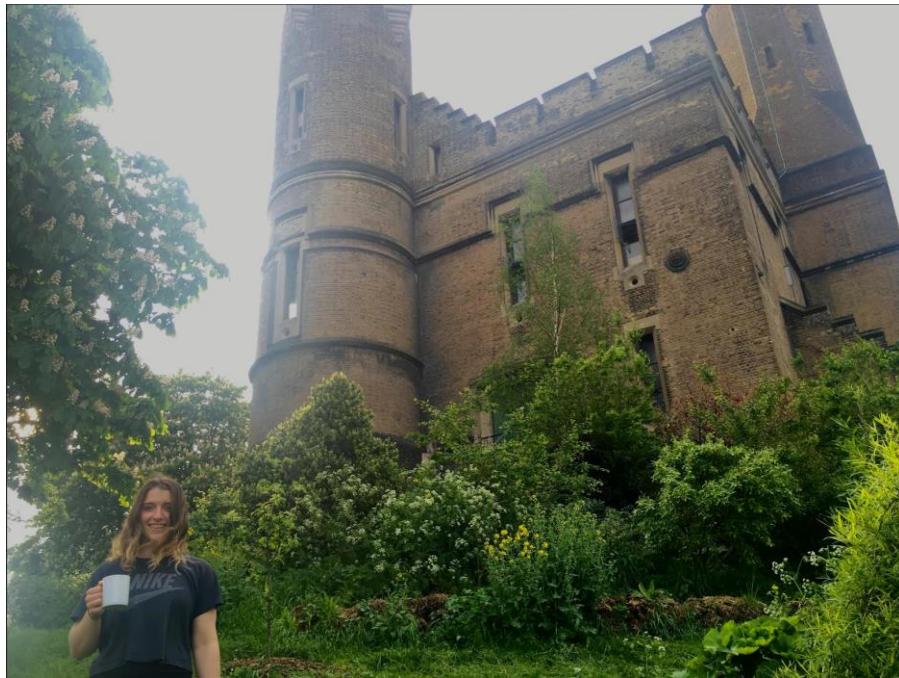
“It does seem to be a trend growing among the well educated because their concerns are not how to make the next meal. You can focus on sustainability and animal welfare beyond your own personal comforts,” said vegan café manager at the *Castle Climbing Centre*, Amy Yates, 23. She added that eating cheap and vegan is becoming [increasingly possible](#).

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<sup>8</sup>*Vegan Society*, 2014: <https://www.vegansociety.com/whats-new/news/find-out-how-many-vegans-are-great-britain>

<sup>9</sup> *VegFest*, 2014: <http://www.london.vegfest.co.uk/2014/2014-visitors-feedback>

<sup>10</sup> *VegFest*, 2014: <http://london.vegfest.co.uk/2014-visitors-feedback>



*The Castle Climbing Centre in London houses a vegan café sourcing produce from the Centre's own garden. Volunteers can tend the garden in exchange for lunch and climbing.*

In a [blog post](#), Pret A Manger chief executive Clive Schlee wrote of his first all-vegan addition to the £510 million chain: “The shop is packed and this is the first time I have seen customers in London sitting on the floor to eat their lunch.”

“The energy of the shop is also quite remarkable,” he added. “This shows that vegan dishes can be just as delicious as veggie dishes, or we have underestimated how strong the vegan movement is.”

Veganism is breaking into all aspects of British life, including a recent call among [vegan cricketers](#) to end the use of leather for balls.

### Insights : The United Kingdom

- Ethical concerns as the main motivator for veganism in the UK, followed by health and environmental reasons.
- 350% increase in plant-based diet in the last decade.
- Urban and suburban areas are home to the majority of vegans.
- Social media and documentaries are changing the image of veganism in the UK.

## 5. Vegan Romance — Households, Couples and Raising a Family

A growing number of people who are following a strict vegan diet are surfacing some new questions about dating, cooking in a family, and raising the next generation of vegans.

Some vegan couples or single parents raise kids — and pets — plant-based from infancy, while others only require vegan eating in the house, or even cook meat for their children.

Survey respondents spoke about a mix of family and cooking arrangements from students in flat-shares who all cook separately, to entirely vegan families who eat together — and everything in between. Many lived with one or more other vegan, vegetarian or flexitarian person. Young adults reported having an impact on parents' meat and dairy consumption, while spouses and partners found ways to support one another — with the occasional squabble.

French blogger Angélique Preux explained in a [\*Huffington Post piece\*](http://www.huffingtonpost.fr/angelique-preux/etre-vegane-et-amoureuse-d'un-omnivore_b_9307146.html) why she could never picture herself in a relationship with an omnivore.

*“Being a couple means shopping together and sharing the costs. For me, it’s out of the question to finance industries that exploit animals,”* she said. *“Self-centred people do not charm me. It would be difficult to love someone who saw themselves superior to animals...Impossible for me to love someone who closes their eyes to the suffering of others or to the repercussions of their actions and their life choices.”*<sup>11</sup>

Here are some comments from survey respondents around Europe who make vegan-omnivore love work:

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<sup>11</sup>*The Huffington Post*, 2016: [http://www.huffingtonpost.fr/angelique-preux/etre-vegane-et-amoureuse-d'un-omnivore\\_b\\_9307146.html](http://www.huffingtonpost.fr/angelique-preux/etre-vegane-et-amoureuse-d'un-omnivore_b_9307146.html)

## A VEGAN IN THE FAMILY

**Can vegan/non-vegan romances work? What do vegans do with omnivorous partners, parents of children, and vice versa? Here's what survey respondents are saying:**

*"We eat together. The vegetarian generally eats vegan for the main meal at home, but succumbs to the products of abuse and murder for dessert!!"* Male, 48, London, UK

*« Il y a que moi qui mange vegan mon mari et mes enfants sont omnivores! On ne mange pas en même temps! Je ne supporte plus l'odeur de la viande. »* Female, 38, Béziers, France

*"I live and eat with my vegan sister. I accept that my boyfriend uses dairy product when he's eating at my apartment. Meat or fish is prohibited."* Female, 24, Brussels, Belgium

*"I prepare dinner. That's always a vegetarian or vegan (for myself) meal. I never prepare meat. Sometimes my husband and son eat some meat in the house and outside the house. We have big discussions then..."* Female, 51, Barendrecht, Netherlands

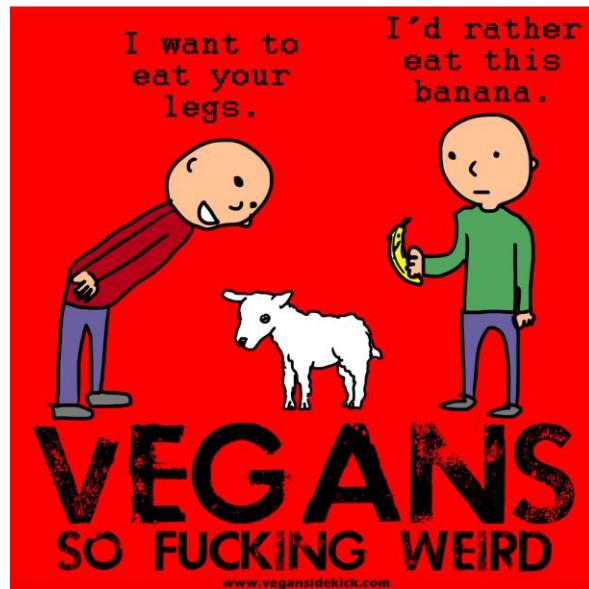
*"Both my mum and dad, who are in their 60s, have recently changed their diets to more plant-based options. My mum experiments with raw, and my dad, smoothies, and I'm proud of them as I haven't pushed them, just explained the changes I have made. They enjoy what they eat much more now."* Female, 34, London, UK

*"When I cook I always make vegan food, but we sometimes eat separate meals. We visit both vegan and 'regular' places. He sometimes orders vegan for himself if ordering take away so I can eat too."* Female, 23, Stockholm, Sweden

*"I cook meat for my husband and son, but I am starting to stop that. My other son wants to go vegan."* Female, 28, East Sussex, UK

*"My omnivore girlfriend was a bit taken aback because she didn't know how she would bake for me! A few weeks later, she had found a bunch of vegan recipes online and started experimenting with dairy free yoghurts. She even ordered a separate pan, so I can keep one for just vegetables when we cook at her place."* Female, 25, London, UK

## 6. 'Plants Tho'— Tipping Points and Veganism in Pop Culture



The information age has altered the fabric of society through the sheer scale of change and speed: Ideas spread rapidly and globally. Respondents to *The Guardian* questionnaire last month from the UK and abroad cited Instagram as helping to disseminate information on veganism and show the diet as attractive through photos of happy, healthy vegan youth, as well as delicious meal ideas up close.<sup>12</sup>

Facebook groups such as '[London Drooling Vegans](#)' and '[Vegan Parenting Italia](#)' organise restaurant outings, trivia nights and VegFest trips for fellow vegans and provide a forum for people to ask each other questions and share recipes.

Vegan blogs review cheese substitutes, culinary methods, non-leather show shops and cosmetic brands that do not test on animals. Forums facilitate discussions on topics such as what to do if your child wants to eat meat and how to react to criticism from parents.

Internet traffic on plant-based diets encourages the availability of products, which in turn helps more people find veganism and share information through social media or personal contact. As more people renounce animal products, the movement grows faster. Tipping points, such as key plant-based books and

*'As more people renounce animal products, the movement grows faster.'*

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<sup>12</sup>*The Guardian*, 2016: <http://www.theguardian.com/lifeandstyle/2016/may/27/the-rise-of-vegan-teenagers-more-people-are-into-it-because-of-instagram>

documentaries, do not fundamentally shift the trend towards plant-based eating, but rather give the self-perpetuating movement energy bursts.

## 6.1 The Documentary Triple Threat

Films (from YouTube videos to inspiring, informative documentaries) have packaged information circulating in the media in a clear, compact and compelling form.

The following documentaries have served as recent catalysts for plant-based dieters by tackling the three primary motivations for quitting meat and dairy — animal ethics, health and the environment:

### *Earthlings Trilogy (2005) — ANIMAL ETHICS*

Pro-vegan documentaries made a splash with the Joaquin Phoenix narrated *Earthlings* (2005), which offers compelling evidence to subvert humankind's dependence on animals for economic purposes including for food, clothing, entertainment and scientific research. The sequel, *Unity* (2015) focuses on the place of humans in a harmonious world and features a cast of 100 celebrity narrators, and a third film, *Beings* is planned for 2020 to focus on nature.

### *Forks Over Knives (2011) — HEALTH*

*Forks Over Knives* posits that humans can control or reverse most degenerative diseases, such as diabetes, heart cancer and obesity, by rejecting animal-based and processed foods. In other words, people have the power to counter the leading causes of death in modern society through diet. Two doctors teamed up to produce the film after finding independently that animal based foods are a leading cause of liver and breast cancer and have amassed plaudits from an impressive cast of vegan celebrities such as Alicia Silverstone, Oprah Winfrey and Cory Booker.<sup>13</sup>

"I know of nothing else in medicine that can come close to what a plant-based diet can do." Dr. T. Colin Campbell said in the [movie's trailer](#), which has accumulated more than 2 million views.

The *Forks Over Knives* brand has expanded to include a repository of online recipes, a smart phone app, a cooking course and free online support for a four-week meal makeover.



*Forks Over Knives* recipes. Choco-banana ice cream (left) and pumpkin parfait (right)

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<sup>13</sup>*Forks over Knives*: <http://www.forksoverknives.com>

### *Cowspiracy: The Sustainability Secret (2014) — THE ENVIRONMENT*

Directed by Kip Andersen and Keegan Kuhn, and crowd funded through *IndieGoGo*, *Cowspiracy* is a documentary that investigates the impact of animal agriculture on the environment and re-examines the policies of major environmental groups such as *Greenpeace* and the *Sierra Club* and their silence over ‘the elephant in the rainforest’: the fact that livestock are responsible for 51% of all worldwide greenhouse gas emissions.<sup>14</sup>

The advocacy effort and research were excellent, but the film truly caught the general public’s attention when rumoured-vegan superstar Leonardo DiCaprio produced a sleeker cut of the documentary and premiered it globally on *Netflix* in September, 2015. The latter half of 2015 exhibited the largest growth in global interest in veganism.<sup>15</sup> DiCaprio’s role in an already moving story, coupled with greater accessibility through *Netflix*, boosted *Cowspiracy*’s traction among a wider audience.

## 6.2 ‘Ancestors’, ‘Plants Tho’ and ‘Protein’: Counter-Messages on the Web

The internet is galvanizing the vegan movement by facilitating the way vegans talk both to each other, and to omnivore sceptics.

While Facebook groups and forums allow vegans to share strategies when talking to omnivores about their dietary choices, one popular comic artist puts all the criticism in one place — and creates a veg-encyclopaedia of ideas to debunk crude disparagement with cheeky responses.

British graphic artists (and heavy metal rocker) Richard Watts started Vegan Sidekick<sup>16</sup> as a Facebook page in 2013 because he had become apathetic toward activism, but still wanted a way to share his thoughts as a vegan ‘nice guy.’ His illustrations have since become a vanguard for vegans who believe in their choices, but don’t take themselves too seriously.

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<sup>14</sup>*Cowspiracy*: <http://www.cowspiracy.com/facts/>

<sup>15</sup>*Google Trends*: <https://www.google.com/trends/explore#q=vegan>

<sup>16</sup>*Vegan Sidekick*: <http://vegansidekick.com/>



*Vegans defend against omnivore haters in the popular VeganSidekick comics.*

“Militant veganism gives vegans a bad name,” Amy Yates said on the matter. “People make assumptions about your ethical standpoints. They start attacking you for being vegan because they feel uncomfortable and assume you judge them for eating meat.”

Watts [characterises common criticisms](#) of veganism from omnivores who might feel the need to ‘take pre-emptive action’ and attack the dietary choices of their peers for purposes of pre-emptive self-defence. Common arguments are given pithy code names such as ‘Ancestors’ (from the notion that our ancestors ate meat, therefore we should) or ‘Plants Tho’ (code for the belief that plants have feelings as well as animals, therefore we should not make distinctions in diet). Watts then divulges and counters these arguments through a plethora of witty panels and pop culture memes.

The comics provide readers the ability to laugh about misunderstandings concerning plant-based eating while gaining ideas for standing up for themselves and for veganism.



*VeganSidekick comics expose common critiques against veganism. The left panel speaks to the disposability of arguments against vegan diets. The right jests at the 'plants tho' sexism argument and Lord of the Rings characters.*

## 6.3 Celebrity Role Models: The Fit, The Sharp, and The Beautiful

What trendy diet are Brad Pitt, Jennifer Lopez and Ariana Grande adopting to stay gorgeous, fit and strong? Hint: It's not Atkins.

These popular pioneers are helping to give veganism a facelift from quirky and underground to modern, mainstream and cool, as ubiquitous vegan leaders such as Bill Clinton, Al Gore and Ellen DeGeneres court an intellectual contingent.<sup>17</sup>

<sup>17</sup>The Huffington Post, 2013: [http://www.huffingtonpost.com/2013/12/01/vegan-celebrities\\_n\\_4351908.html](http://www.huffingtonpost.com/2013/12/01/vegan-celebrities_n_4351908.html) and New York Magazine, 2014: [http://nymag.com/news/intelligencer/vegan-celebrities-2014-1/?utm\\_content=bufferdf47b&utm\\_medium=social&utm\\_source=facebook.com&utm\\_campaign=buffer](http://nymag.com/news/intelligencer/vegan-celebrities-2014-1/?utm_content=bufferdf47b&utm_medium=social&utm_source=facebook.com&utm_campaign=buffer)



*Movie star Ellen Page follows a vegan diet.*

While no interviewees or survey respondents cited a vegan celebrity as profoundly influencing their dietary decisions, several did acknowledge the role of high profile vegans in providing prospective vegans with an attractive array of role models proving veganism can complement and surface qualities of health, fitness, popularity and compassion. Most people won't go vegan because Beyoncé or Miley Cyrus dabble in the diet, but celebs might encourage the curious creature lover that plant-based eating is healthy and attainable, and vegan celebrities are likely to earn greater respect from ethically-conscious consumer fans.

Vegan athletes stand as living proof that people can become vegan and still perform beautifully, and look and feel their best. Their numbers include the ranks of ultra distance runner Scott Jurek, powerlifter Patrik Baboumian (2011 Germany's strongest man 105kg category), bodybuilder Billy Simmonds, heavyweight boxing champion [David Haye](#), basketball star Dalila Eshe, British footballer Neil Robinson and Swedish rowing champion Ida Andersson.<sup>18</sup>

***'Vegan athletes stand as living proof that people can become vegan and still perform beautifully'***

Austrian vegan boxing champion Melanie Fraunschiel said she turned from a vegetarian to a vegan diet in 2014 after reading vegan athlete Brendan Brazier's book '*The Thrive Diet*'.

'Refusing dairy products and meat is essential to having good skin, staying healthy and having a good performance,' [Fraunschiel told Great Vegan Athletes](#). 'When I started boxing, I had to lose weight, and I tried different diets...it was difficult, and I gained it again right after losing it. My performance was

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<sup>18</sup>*Great Vegan Athletes:* <http://www.greatveganathletes.com/tags/team-sports>

suffering under these conditions...my body was refusing that treatment by showing it with pimples, sickness and bad recovery.'



*Vegan Austrian boxing champion Melanie Fraunschiel throws a powerful right cross.*

Since becoming vegan, Fraunschiel has dropped a weight class, won the national cup and brought home the gold from Hungary at the European level.<sup>19</sup>

Athletes at all levels show they are proud to be vegan from the pro elites to adult club teams and groups such as [Vegan Runners UK](#) and [No Meat Athlete](#) — eager to flash the vegan brand on clothing and gear while going for the gold.

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<sup>19</sup>Great Vegan Athletes: <http://www.greatveganathletes.com/melanie-fraunschiel-vegan-boxer>



**Insights :**  
**Tipping Points**  
**and Veganism**  
**in Pop Culture**

- Instagram and Facebook are critical media in the spread of veganism.
- As more people become vegan, they share information to propagate the trend further.
- Documentaries are powerful catalysts of the trend and focus on animal ethics, health and environment.
- Vegan celebrities and athletes serve as role models, although they are not cited as significant motivations for becoming vegan.

## 7. Veganism around Europe — A Country-by-Country Overview

Each country has its own culture, cuisine, and attitude towards the new and different. Each nation in Europe is unique, and so are its plant-based feeders. Here are some of the most intriguing and energetic plant-based markets on the continent:

### 7.1 GERMANY — Hip and Trendy: A Vegan Paradise

When millions gather to enjoy Bratwurst and chug Pilsner style brews for Oktoberfest in Munich, [vegan sausages are also on the menu](#).

Market availability of animal substitutes has helped Germany integrate the vegan trend into its sense of tradition, culture and cuisine with vegan schnitzels and savoury pastries rocketing urban Germany to the status of plant-based paradise. With 800,000 vegans as of 2013 and a spike in recent years among the 15-35 year-old population bringing the number to 900,000 vegans in 2015, plant-based diets are becoming largely accepted without stigma — and a population of 7 million vegetarians supplies German vegans with a sympathetic cushion and potential for proselytization.



*German interpretations of pastries (top-left), pepperoni pizza (bottom-left), schnitzel (top-right) and seitan steak medallions (centre)*

An overall high interest in vegan diets is especially evident in Berlin and Hamburg. Saarland also showed a strong interest in the early part of the decade but has since stagnated.<sup>20</sup>

“In the capital, Berlin, veganism has already become part of the mainstream. No other German city offers more vegan cafés or restaurants and retailers than Berlin. It seems to be a vegan paradise,” Jennifer Valdés, a spokesperson for *Veganz*, said. Veganism exploded onto the restaurant scene and took off on Google Trends in Germany in 2013, as opposed to 2015 in most EU countries.

*‘In the capital, Berlin, veganism has already become part of the mainstream.’*

To complement the burgeoning 1462 vegan or vegetarian restaurants<sup>21</sup>, Jan Bredack, a 42-year-old former meat lover turned vegan opened Europe’s first all vegan grocery store, *Veganz*, in Berlin in 2011. *Veganz* clientele are 60% vegan or vegetarian, 70% women, 60% hold university degrees and 17% are students.<sup>22</sup> In 2014-2015, the store expanded to seven German cities, as well as to Vienna and Prague. It now plans to open more locations in and outside of Europe and take a mobile snack trailer to fairs, festivals and other outdoor events.

<sup>20</sup> Google Trends: See appendix.

<sup>21</sup> Happy Cow: <https://www.happycow.net/europe/germany/>

<sup>22</sup> The Local, 2014: <http://www.thelocal.de/20140605/jan-bredack-boss-of-worlds-first-vegan-supermarket-veganz> and personal interview with Jennifer Valdés

Non-vegans in Germany can be just as eager to try plant-based alternatives, Valdés added. The business has witnessed explosive growth with revenue doubling or more each year since 2013.

Year	Total Revenue (€)
2013	5.300.000
2014	10.500.000
2015	24.000.000
2016	80.000.000

*Vegan grocery stores have increased their revenue significantly since 2013*

The store takes away the onus of meticulously weeding through labels and googling ingredients. Ubiquitous *Vegan Society* certified labels wink back at customers throughout the isles.

“Our shops make it easy to adopt and stick to a plant-based diet,” said Valdés. “Working your way through the fine print becomes unnecessary.”

## 7.2 IRELAND — A Young and Enthusiastic Market

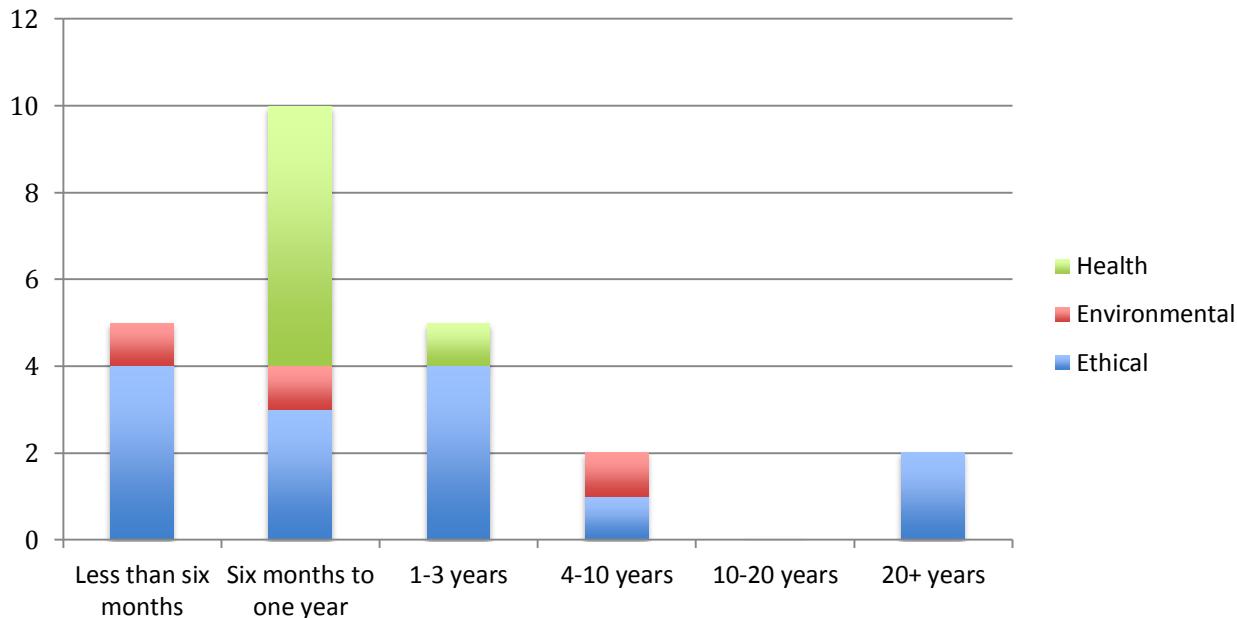
In 2015, Ireland launched its first *VegFest* in Galway. Tickets sold out in two hours. Much to the surprise of Ireland’s [\*Vegan Society\*](#), established just seven years ago, the next festival in Dublin saw more than 1000 attendees with queues of more than an hour.

It appears Ireland has arrived fashionably late to the party. But it is in full swing!

Home to Dublin’s Temple Bar bohemians, Galway’s art gallery goers and a burgeoning student population in Limerick and Cork, Ireland is witnessing an eager surge in veganism from a young demographic against a more traditional agricultural backdrop. Eighty-nine percent of survey respondents in Ireland fell in the 16-37 age range, with one notable 63-year-old male outlier from Dublin. Ethical, environmental and health motivations all featured prominently in decisions to go vegan among the Irish, and the male-to-female distribution more even than in other European countries as well.

*‘Ireland is witnessing an eager surge in veganism from a young demographic.’*

## How long have you been vegan?



*Irish respondents answer the question how long they have been vegan and why.*

One 18-year-old full time student from Kilkenny — who turned to veganism while recovering from an eating disorder to stay healthy, manage weight and maintain a high energy level — commented on how the youth in Ireland is leading the charge:

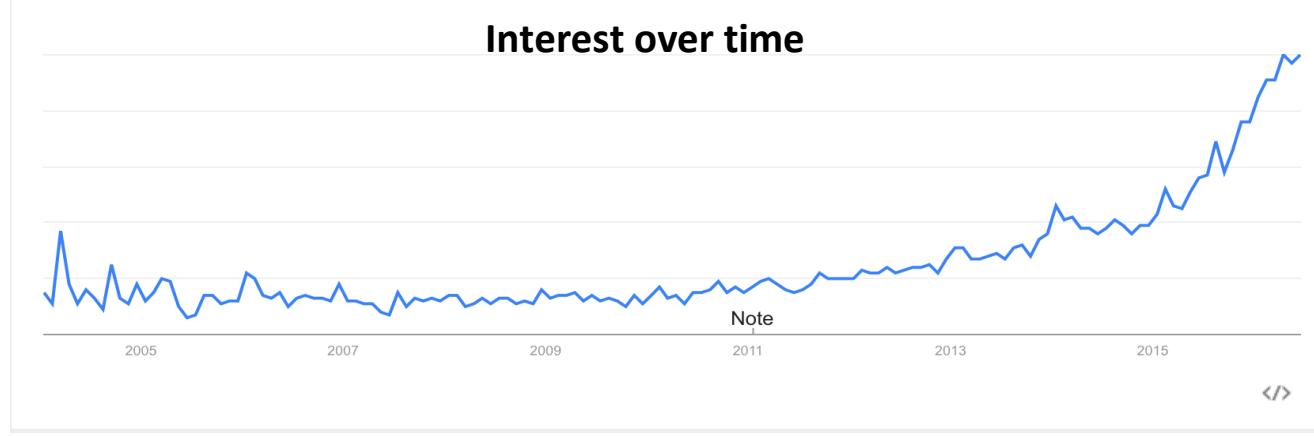
"The traditional diet here is very milk, egg and meat heavy, although despite that I feel there is an emerging trend among youth," she said. "I feel that social media and *Youtube* play a major role. I feel as a whole that there is a trend of the public becoming much more healthy and nutrition conscious, so it is a matter of time before they find veganism."

Edmund Long, 38, said a rapid increase of veganism has been taking place in Ireland since he co-founded '*The Vegan Society of Ireland*' in 2009, but the trend struck him as particularly profound in the last three years, in part because of a mass increase in online activity on social media and internet news sites.

"A lot more businesses are setting up and marketing towards vegans themselves, and all the large supermarkets label products suitable for vegans," Long said.

He pointed to a growing online market from major Irish distributors such as [PlantGoodness24](#) and the Vogue-featured [Dee's Wholefoods](#) as well as a burgeoning in Irish vegan websites, blogs such as '[The Irish Vegan](#)' and '[Go Vegan](#)', restaurants and social groups. (Vegan Ireland has accumulated 16,227 Facebook likes and 1,395 twitter followers.) While the country is accepting an influx of products from the UK, such as popular [Vegusto cheeses](#), the Irish are also eager to seek out new local products such as [Moodley Manor](#) plant-based bacon, Long said.

The market is young, but promising. Google Trends shows an exponential spike in searches for 'vegan' in Ireland in the last two years alone, with the highest interest per capita concentrated in up-and-coming cities. Interest per capita is highest in the Lucan ad Tralee areas, and about half as strong in Dublin.



*Google trend analysis of interest in the 'vegan' search term in Ireland over time.*

Coming from a culture steeped in a tradition of agriculture, Irish vegans also face resistance or misunderstanding.

"Most people's attitude when I tell them I'm vegan is not very positive. They see it as a joke or an impossible diet to live by and assume all I eat is salad. I feel I have to justify my diet and some people interrogate me as if I'm on trial or something!" a 41-year-old female stenographer from Dublin wrote.

Despite some criticism, most vegans on the Emerald Isle are hopeful the trend is taking off.

### 7.3 FRANCE — A Stratified and Hostile Milieu

You could cut the tension between vegans and omnivores in France with a knife — as long as that knife has touched neither a block of butter nor a vegan hand.

Stage right: The L214<sup>23</sup> and assorted sympathizers. A group of abolitionist animal rights activists and hardcore vegans who check clothing labels meticulously and refuse romantic relationships with omnivores.

Stage left: A meat and dairy loving population with a widespread belief in 'speciesism', some of whom are terribly confused about what a vegan is (indeed, the French terms for 'vegetarian' and 'vegan'

*'Where other nations integrate or politely accept, France discusses and debates.'*

<sup>23</sup>L214: <http://www.l214.com/>

can be nebulous and often do not match English equivalents<sup>24</sup>), while the rest mock the trend. Militant or hostile? Choose your side. A middle ground may exist, but it is drowned in the caterwauling discord.

The actions of the *L214*, coupled with the World Health Organisation's 2015 classification of processed and red meats as [cancer-causing carcinogens](#), have spurred an energised debate of health, philosophy and societal values across France. Arguments on both sides — [defending the meat industry](#) and expressing the ethical necessity of plant-based while addressing '[Are Vegans Extremists?](#)' — provide interesting, well sourced, and often insightful commentary. Where other nations integrate or politely accept, France discusses and debates.



*An L214 poster urging for the closure of all 'abattoirs.'*

The *L214* began ruffling feathers in 2008 when it released an investigation of the *Charal* company slaughterhouse. Meat consumption in France fell by 15% between 2003 and 2010, and in 2014 world-renown chef Alain Ducasse opened the ritzy, vegetarian Plaza Athénée in Paris, yet vegan meals were still banned in public school canteens as of 2014.<sup>25</sup>

The *L214* struck gold — and struck a chord — in 2015 and 2016 when it [unmasked egregious animal cruelty](#) in a series of high profile slaughterhouses with 'Red Labels' (not battery reared) that supply organic meat to some of France's most well known chefs.

France's most respected daily newspaper *Le Monde* released images from *L214* hidden cameras of 45-day old, Easter lambs shocked, hanged and bled or cut up while still alive and prompted [philosopher Michel Onfray](#) to declare that free thinking, informed individuals should cut out animal products. The

<sup>24</sup> In French, the term 'végétarien' can denote vegetarian or pescetarian, while 'végétalien' can mean a strict vegetarian or plant-based eater, and 'végane' tends to indicate a full vegan lifestyle, although sometimes 'végétalien' and 'végane' are used interchangeably.

<sup>25</sup> *The Telegraph*, 2014 : <http://www.telegraph.co.uk/news/worldnews/europe/france/11186146/France-develops-taste-for-vegetarian-cuisine.html>

*abattoir* supplies meat to some of Alain Ducasse's non-vegetarian restaurants and to celebrity beef butcher Yves-Marie Le Bourdonnec.<sup>26</sup>

Battleship sunk, the French government has launched a parliamentary inquiry that may lead to increased regulation of its animal produce industries.<sup>27</sup>

Slowly filling in the synapse of a stratified nation, rising numbers of 'flexitarians' are older than the stereotypical student activist. Concerned with the cost and nutritional value of food, this slice of the population, mostly in their late 20s to early 40s, emphasizes local produce.

Among this contingent, Adeline Abrard, 29 from Brittany, explained she considers herself vegetarian, but once a week she will eat meat from a local farm or fish that is not overfished or endangered. For eggs, dairy and vegetables, she looks for the bio label and local produce when possible.

Other survey respondents from France were distributed evenly in the 18-38 age range, mostly ethical vegans, and spoke of experiences of mockery for eating plant-based but also of cautious hope, as family members incorporate more veg-friendly options at the dinner table.

*'Becoming vegan is a growing trend even if it continues to be marginalised and mocked out of misunderstanding,'* said one woman, 24, who works in human resources for a financial consulting firm in Paris.

An 18-year-old female, Parisian student added the following:

*'I have two friends who changed their style of consumption and their relationship to animal products in the last year even though they at first approached this with recalcitrance. Young people and minorities — either ethnic LGBTQIA+ or, more rarely, religious — are more susceptible, in my understanding, to becoming more conscious about their food choices and changing their behaviour.'*

Despite the shocking footage, an increasingly intense debate and an optimistic vegan youth wing, France's mainstream has yet to be won over. Food labels are beginning to carry the [EU vegetarian and vegan stamps<sup>28</sup>](#). But if a more committed form of plant-based eating is creeping through France, the phenomenon often goes unacknowledged.

Reporting on plant-based eating in France can be unabashedly condescending, and often outright sardonic.

The [top search result on veganism](#) from the French health and medical website *Doctissimo* headlines '*Vegans : the extrême vegetarians*', begins in shock : '*Can you be More vegetarian than a vegetarian? Apparently so !*' It then goes on to mock : '*At the dinner table, make like a monkey! Our cousins, the*

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<sup>26</sup>*The Telegraph*, 2016: <http://www.telegraph.co.uk/news/2016/03/29/frances-abattoirs-to-be-inspected-for-animal-cruelty-after-shock/>

<sup>27</sup>*The Telegraph*, 2016: <http://www.telegraph.co.uk/news/2016/03/29/frances-abattoirs-to-be-inspected-for-animal-cruelty-after-shock/>

<sup>28</sup> *Vegemag*, 2016 : <http://www.vegemag.fr/actualite/le-label-v-de-lunion-vegetarienne-europeenne-arrive-en-france-6969>

*monkeys, have some lessons to give us about a proper diet !* and finally concludes : ‘*Don’t be fooled by veganism.*’

Even mainstream magazines, such as *L’Obs*, report on vegan options expanding in supermarkets in a castigating, derogatory tone<sup>29</sup>. The article ‘*Why is Carrefour Flirting with Vegetarians?*’ questions why a major supermarket chain would bother stocking products friendly for a demographic it estimates cannot possibly account for more than three percent of the French population. Even if its veggie brands do not skimp on nutritional value, natural sourcing or flavour, surely nobody would want to buy them.

‘*We’ve noted that, of course, the public does not want to make any concessions about pleasure,*’ the piece asserts.

*But relax, folks,* the article goes on to say, *the market is really for flexitarians, not vegetarians or their ‘more radical cousins’, the vegans!*

Release breath.

## 7.4 ITALY — Mangiare Bene!

Step into a world of mouth-watering spinach bruschette, spiced lentil polpette and star-stuffed broccoli cream pizzas.

Food blogger and fitness enthusiast Emanuele Libro crafts recipes for traditional Italian dishes made the vegan way in [\*Golosi e Vegani \(Gluttons and Vegans\)\*](#). But the Italian plant-based selection does not stop at gnocchi with carrot cream sauce. For dessert, Libro shows his Italian readership how to whip up a tantalising selection of vegan cakes and pastries like pros. Choco hazelnut cream torte anyone?

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<sup>29</sup> *L’Obs*, 2016: <http://tempsreel.nouvelobs.com/planete/20160225.OBS5295/pourquoi-carrefour-drague-les-vegetariens.html>



*'In Italy, [vegetarians and vegans] make up about 10% of the population, and our numbers are growing by the day. There are many vegan and vegan-friendly places, from restaurants to supermarkets.'*

— Emanuele Libro, 31

Libro is finding a niche within a culture and cuisine that are more compatible with veganism than one might think. Although traditional Italian food is meat and cheese heavy — food philosophies of wholesome, locally-grown produce and a healthy Mediterranean diet might make Italy's flirtation with the plant-based trend, which sparked in 2011 and has been on the rise ever since<sup>30</sup>, a lasting relationship. The facts that Italian starches such as pasta and polenta do not rely on animal products and that the base for almost all dishes is olive oil, not butter, prime Italian cuisine as promising for vegans, with a bit of creative flair.<sup>31</sup>

Italians value local, fresh and seasonal produce. And vegan food from the land floods in abundance from Sicilian citruses to Piedmont hazelnuts. Hearty veggie variety, coupled with notable educational efforts from Italian animal sanctuaries, has spurred the movement among ethically and health conscious consumers.

According to a [2015 report in \*La Repubblica\*](#), vegetarians and vegans in Italy are growing by between 10 and 15% per year. Although vegetarianism grew faster between 2013 and 2015 according to the report, interest in veganism on Google has been steadily higher, which indicates Italy's population of vegetarians (circa 7%) might be considering the diet. The report detailed that vegetarians and vegans in Italy were motivated by ethical (31%), environmental (9%), health (24%), as well as other (36%)

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<sup>30</sup> *Google Trends*: See appendix.

<sup>31</sup> *The Vegan Society*, 2014:

[https://www.vegansociety.com/sites/default/files/The%20Vegan,%20Spring%202014\\_1.pdf](https://www.vegansociety.com/sites/default/files/The%20Vegan,%20Spring%202014_1.pdf)

reasons, and that 120 pharmacies have adopted the vegan label with 300 projected for later that year.<sup>32</sup>

“Animal sanctuaries like Ippoasi, combined with the efforts of volunteers and vegan education groups, are leading the Italian vegan transition, making Italy more compassionate and respectful towards all forms of life,” writes Ilaria Bertini in a *Vegan Society* annual publication in 2015.<sup>33</sup>

Bertini noted even regional areas show strong signs of change. When she visited a traditional, meat-based restaurant near her hometown and mentioned she was vegan, the server swapped her menu for one featuring seitan, gnocchi, whole grains and an abundance of vegetable options.

Unlike other European countries, that showed limited interest until recent years, followed by exponential interest, Italy’s growing enthusiasm for veganism has been more steady and linear. The largest growth took place in 2014, and since 2011, veganism has been most researched in Aosta in the northwest, followed by Central Italy (Tuscania and Emilia-Romagna provinces) and northeast (Trentino-Alto Adige/Südtirol and Friuli-Venezia Giulia), while the regions on the southern mainland have historically exhibited a lack of interest.

*‘Italy’s growing enthusiasm for veganism has been the most steady and linear.’*

Overall, a trend towards plant-based consumption is positive in The Boot, with the international vegan website [Peaceful Dumpling](http://www.peacefuldumpling.com) reporting Italy as the world’s second friendliest country to vegans, and the only country in Europe, other than top-charter United Kingdom, to make its top six list. Vegan groups and websites tend to focus more towards parenting, health and fitness, catering to a more seasoned young adult and middle aged demographic with a mix of ethical and health concerns. The average age for survey respondents living in Italy was 36, and most had followed a vegan diet for 1-10 years.

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<sup>32</sup> *Repubblica*, 2015:

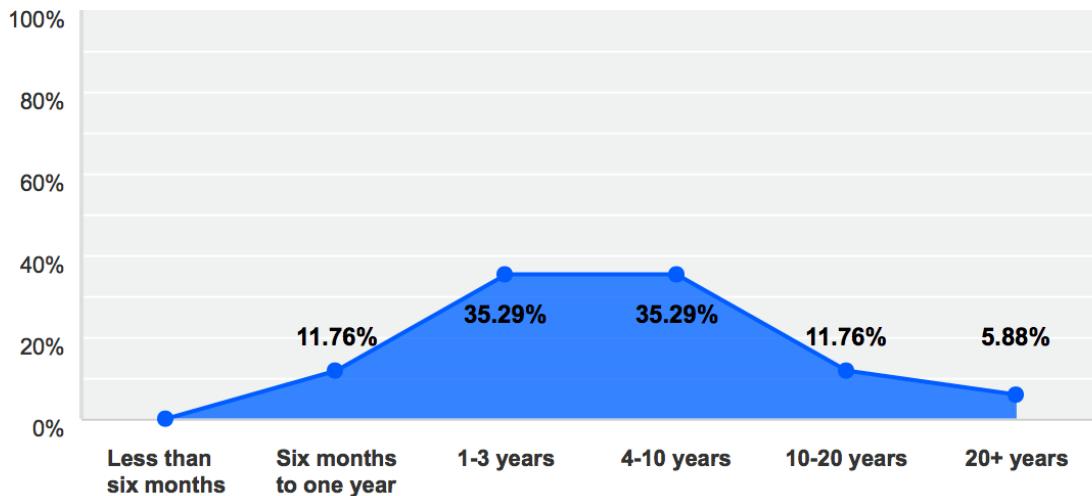
[http://www.repubblica.it/cronaca/2015/10/16/news/il\\_popolo\\_dei\\_vegetariani\\_e\\_vegani\\_in\\_italia\\_l\\_infografica-125226613/?ref=search&refresh\\_ce](http://www.repubblica.it/cronaca/2015/10/16/news/il_popolo_dei_vegetariani_e_vegani_in_italia_l_infografica-125226613/?ref=search&refresh_ce)

<sup>33</sup> *The Vegan Society*, 2014:

[https://www.vegansociety.com/sites/default/files/The%20Vegan,%20Spring%202014\\_1.pdf](https://www.vegansociety.com/sites/default/files/The%20Vegan,%20Spring%202014_1.pdf) (page 9)

## How long have you eaten this way?

Answered: 17 Skipped: 0



*A majority of Italian respondents have been vegan for more than 1 year*

## 7.5 SPAIN — Gradually Getting on the Bandwagon

Spaniards love their meaty jamón and egg-tortilla de patata. But there are gradual signs of change.

*Happy Cow*, a website that keeps the world's largest database of vegetarian and vegan restaurants, reported a 94% increase in vegan and vegetarian restaurants in Spain from 2011 to 2014. Now, the number has shot up by another 419 restaurants, to a grand total of 1105 throughout the country.

An increasing number of Spanish people describe themselves as 'veg curious' or 'vegivores', with a focus on eating more vegetables rather than cutting out animal products and are pleased with an influx of vegan baked goods [at facelifted former cigarette factories](#) turned art galleries and market stalls overrunning with tall, white asparagus, plump cherries and eclectic assortments of fungi.

Fifty percent of Spanish survey respondents said they placed health above ethical reasons when choosing a diet. Google Trends reveals a low interest in veganism within the capital city of Madrid, but greater curiosity in the Balearic Islands, Canary Islands, Galicia and Catalonia.

Vegetarianism, if not veganism, is becoming better understood with the city of Barcelona passing a declaration last year to achieve 'veggie-friendly' status. The city plans to increase options for vegetarian and vegan tourists by establishing a resource center for veg-friendly businesses, as well as encourage a *Meat Free Monday* for residents.<sup>34</sup> (Paul McCartney launched [the concept](#) in 2009 with his daughters and groups such as schools and military units have since adopted it internationally.) But animal rights activists of the [AnimaNaturalis](#) group said these promises had fallen short and took to the streets, naked and covered in fake blood, earlier this year to protest — to the amusement of most locals.<sup>35</sup>

**'Vegetarianism, if not veganism, is becoming better understood.'**

## 7.6 THE NETHERLANDS — Explosive Growth, Expensive Options

In the last three years, the freethinking Dutch have been converting to veganism by the minute.

Twenty years ago, a report counted 16,000 vegans in the Netherlands, said representatives from the Netherlands' vegan society *Nederlandse Vereniging voor Veganisme*.

Group membership grew by 30% in 2013 and by 60% in 2014. Comparing membership to previous numbers year ago, the group estimates there are about 70,000 vegans currently living in the Netherlands. Google searches for 'vegan' in the Netherlands grew by more than 150% in the last year alone. A spike in March 2008 corresponded with the introduction to soy based vegan spreads to the Dutch market, and the trend took off in 2011 and has been growing faster ever since.<sup>36</sup>

Motivations for going vegan in the Netherlands include more widely disseminated information (documentaries, books and the internet) available about the damage of animal industries, coupled with more public examples of healthy, fit and happy vegans, as well as an increased ease at finding vegan products and options in restaurants, said Debby van Velzen, a spokesperson for *Nederlandse Vereniging voor Veganisme*.

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<sup>34</sup>*The Local*, 2016: <http://www.thelocal.es/20160323/barcelona-declares-itself-a-veggie-friendly-city>

<sup>35</sup>*The Independent*, 2016: <http://www.independent.co.uk/news/world/europe/animal-rights-protest-spain-vegan-fake-blood-activists-a7043491.html>

<sup>36</sup> See Google Trend diagram in appendix.

The *Netherlands Vegan Challenge* is attracting an expanding portion of the Dutch population. Now run twice a year, the Challenge, which asks participants to adopt a vegan diet for 30 days, brings in 2000-2500 participants per event and more than 14,000 total annual participants since 2013.

Despite monumental growth in interest, van Velzen added, vegans in the Netherlands are looking for more [readily-available, cost effective solutions](#) and for more options when dining out. Current options remain [pricy](#).

***'Vegans in the Netherlands are looking for more cost-effective solutions.'***

## 7.7 SWEDEN — Way Ahead of the Curve



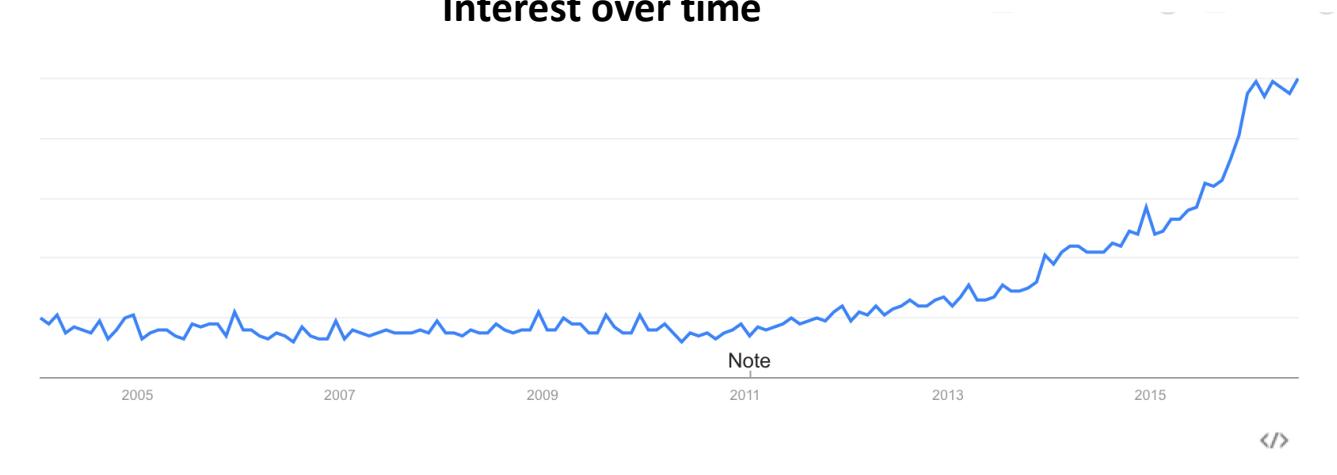
*Co-hosts of Sweden's first veg cooking TV show. The vegan trend is particularly prominent among women in their 20s.*

It will come as a shock to no one that the Swedes moved towards reducing meat and dairy consumption before the rest of Europeans. In Sweden, innovation is a cornerstone of culture. One in ten Swedes in 2014 was already vegetarian (6%) or vegan (4%), a figure which goes up to 17% among 15-34 year-olds, according to a study commissioned by *Djurens Rätt* (Animal Rights Sweden).<sup>37</sup>

***'Swedes moved towards reducing meat and dairy consumption early on.'***

The study showed a four percent increase in vegetarians and vegans from 2009 to 2014. If this is correlated with increase rates for interest during that period on Google Trends, the available data indicates veganism in Sweden may be up to as high as 4.1% of the population or 395,000 vegans. Exponential growth in interest in veganism on the web has been present in Sweden since 2011, with unprecedented interest in the last year alone (59 to 100 percent interest jump from mid 2015 to present day).

### Interest over time



*Google Trends for 'vegan' in Sweden. Taking off since 2011.*

Data also suggested that 37 percent of non-vegetarians said their interest in purchasing plant-based products had increased over the last year, [prompting one blogger to muse over Sweden becoming the world's first all vegan nation.](#)

<sup>37</sup> *The Independent*, 2014: <http://www.independent.co.uk/news/world/europe/one-in-ten-swedes-is-vegetarian-or-vegan-according-to-study-9212176.html>

According *VeganForum.com*, Sweden underwent its ‘vegetarian revolution’ in 2007, but products then relied heavily on eggs or dairy for protein or taste. Since, the options have diversified to include more plant-based alternatives.

In recent history, vegans have been viewed as having stronger political and activist motivations, and 100% of survey respondents living in Sweden reported their primary motivation for becoming vegan as animal rights — one even said she was inspired to go vegan after watching a show on chickens on Swedish TV. Environmental concerns also surfaced as a secondary factor across the board, as these issues feature prominently in Swedish education and public life.

A high percentage of Swedish vegan respondents worked in the fashion industry and all were women in their 20s or early 30s; most had been vegan 1-3 years. Respondents recognized the trend as growing among young women and commented that in Sweden veganism is more common and more understood than in Barcelona, Paris, even London. One respondent noted that when friends get together for dinner, the host will always cook a veggie option. Vegans will often live with other vegans or vegetarians, but just as readily with omnivores.

Self-described ‘Official tree hugger and sassy health gal’ Elenore Bendel Zahn explains how to ‘live passionately and glow like a superhero’ ‘the greenylicious way’ in her website [Earthsprout](http://www.earthsprout.com/?p=5929). Bendel Zahn announced last September she would be co-hosting Sweden’s first all vegetarian cooking show with Karoline Jönsson. Mouthwatering shots from on-set below.<sup>38</sup>

*‘Vegans have been viewed as having stronger political and activist motivations.’*



<sup>38</sup>Earthsprout: <http://www.earthsprout.com/?p=5929>



Insights :  
Veganism  
around Europe

- **Germany:** Veganism is mainstream in large cities, particularly Berlin, and continues to grow.
- **Ireland:** A young trend but growing with enthusiasm. Health and ethical reasons are main motivators.
- **France:** Intense, stratified debate over veganism with vegans often seen as extreme. Animal ethics and health concerns are powerful drivers of increasing plant based consumption.
- **Italy:** Large, steady, and linear growth in veganism. One of Europe's most vegan-friendly countries with an adaptable cuisine.
- **Spain:** Veganism is not very well understood, but this is slowly changing with a rise in *flexitarians*, predominantly in Barcelona.
- **The Netherlands:** Veganism is popular and growing fast. There is a desire for an increase in availability of cost-effective vegan food.
- **Sweden:** Veganism has been well understood and popular for several years, especially among young women.

## 8. Going Head-to-Head? — The Impact of Veganism on the Dairy Industry

About 500 million people call Western Europe home; the population is slightly increasing, with a growing number of aging residents. The economic core — which accounts for about 80 percent of the region's population and consumer expenditures — includes Germany, France, the United Kingdom, Italy and Spain. Taste in dairy consumption varies widely across European nations, with cheese consumption per capita highest in France, Germany, Italy, the Netherlands, Sweden and the UK, in order from highest to lower, whereas butter consumption features prominently in France and Germany, and Ireland and the UK consume the most litres of milk per capita. Preferences also vary for taste of products, convenience, nutrition, wholesomeness and packaging. The British, for example, tend to spend more on good quality, convenient food, whereas Germans prefer to eat cheaply and spend instead on holidays and luxury items such as cars.<sup>39</sup>

As the dairy industry adapts to plant-based trends, popularity of vegan substitutes would be expected to reflect these cultural preferences.

The trend towards veganism, among other factors, might be sending the dairy industry into a nosedive. According to agricultural reports assessing market trends, dairy consumption per capita from 2008 with forecasts until 2018 shows a steady increase based on population growth, the European economy and market trends.

*'The trend towards veganism might be sending the dairy industry into a nosedive.'*

European Main Markets Expenditures on Dairy Products Per Capita 2008-2018

Country	2008	2009	2010	2011	2012	2013	2014F	2015F	2016F	2017F	2018F
European Union	339.6	339.4	345.3	358.4	363.6	370.7	377.2	387.0	399.2	412.1	425.2
France	443.5	437.9	440.8	455.0	464.4	468.5	470.6	477.9	486.2	495.5	505.3
Germany	327.8	328	345.2	368.9	386.4	410.5	425.3	441.5	458.6	475.3	490.0
Italy	416.1	414.9	406.5	418.1	411.6	401.9	402.9	408.3	417.4	427.9	439.7
Spain	320.9	298.1	306.7	309.5	302.6	296.8	297.7	302.7	311.2	321.5	333.4
United Kingdom	262.2	273.1	269.5	275.7	278.7	284.2	290.6	297.8	307.5	316.8	326.4

Source: Euromonitor International, 2014. F=Forecast

40

<sup>39</sup> Agriculture and Agri-food, 2015: <http://www.agr.gc.ca/eng/industry-markets-and-trade/statistics-and-market-information/agriculture-and-food-market-information-by-region/europe/market-intelligence/dairy-products-western-europe/?id=1420644518049>

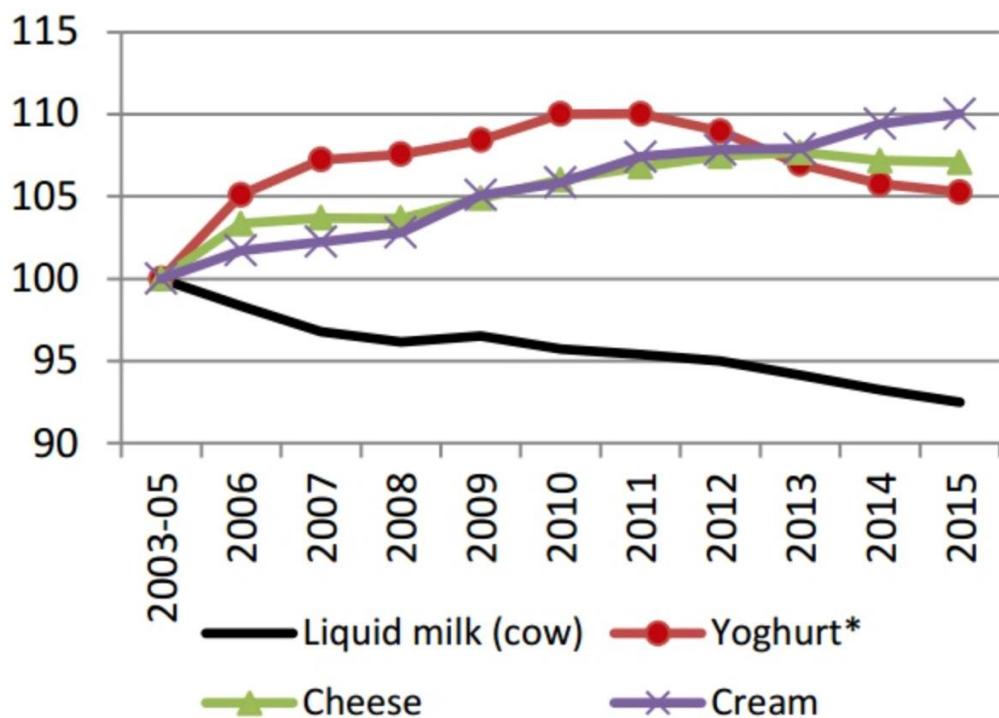
<sup>40</sup> ibid.

However, projected gains for dairy in 2014 and 2015 — the years the vegan craze gained sudden momentum— proved false. Dairy sales declined, rather than grew, almost across the board. The *European Commission* found an increase in exports outside of Europe of drinking milk from 2014 to 2015 of 19% insufficient to compensate for a plummeting in per capita consumption within the continent. Cream production fared okay, while yogurt production remained stable even as per capita retail sales declined by 0.1 kg.<sup>41</sup>

France noticed a sharp decline in drinking milk sales in 2014 and 2015 because of a number of factors including increased stresses resulting in less time for breakfast, an aging consumer base, product alternatives and intolerances to milk.<sup>42</sup>

The following chart shows the decline in most dairy products within the EU for the post-2014 period.

### Dairy Products EU Retail Sales Per Capita (Index, 2003-2005 = 100)



43

*Decline in most dairy products within the EU for the post-2014 period*

<sup>41</sup>AgriLand, 2014: <https://www.agriland.ie/farming-news/diverging-trends-in-eu-retail-dairy-sales-per-capita/>

<sup>42</sup>Euromonitor, 2012: <http://www.euromonitor.com/dairy-products-in-france-isic-152/report>

<sup>43</sup>AgriLand, 2016: <https://www.agriland.ie/farming-news/diverging-trends-in-eu-retail-dairy-sales-per-capita/>

The unexpected downtown for dairy, correlating with a spike in vegan interest, could indicate consumers, both vegan and veg-curious, are turning to alternative sources such as almond, coconut and soy based products.

## 8.1 Case Study: Dairy in the UK

The UK offers a study in a highly competitive dairy market, which could witness a large impact from a burgeoning trend towards plant-based alternatives. Pressure on the dairy industry comes both from the growing interest in alternatives, and on a larger scale, from steep price competition. As a highly competitive market drives down the price of milk, smaller producers are overwhelmed, and large producers (*Tesco, Sainsbury's, Asda*) dominate the market.

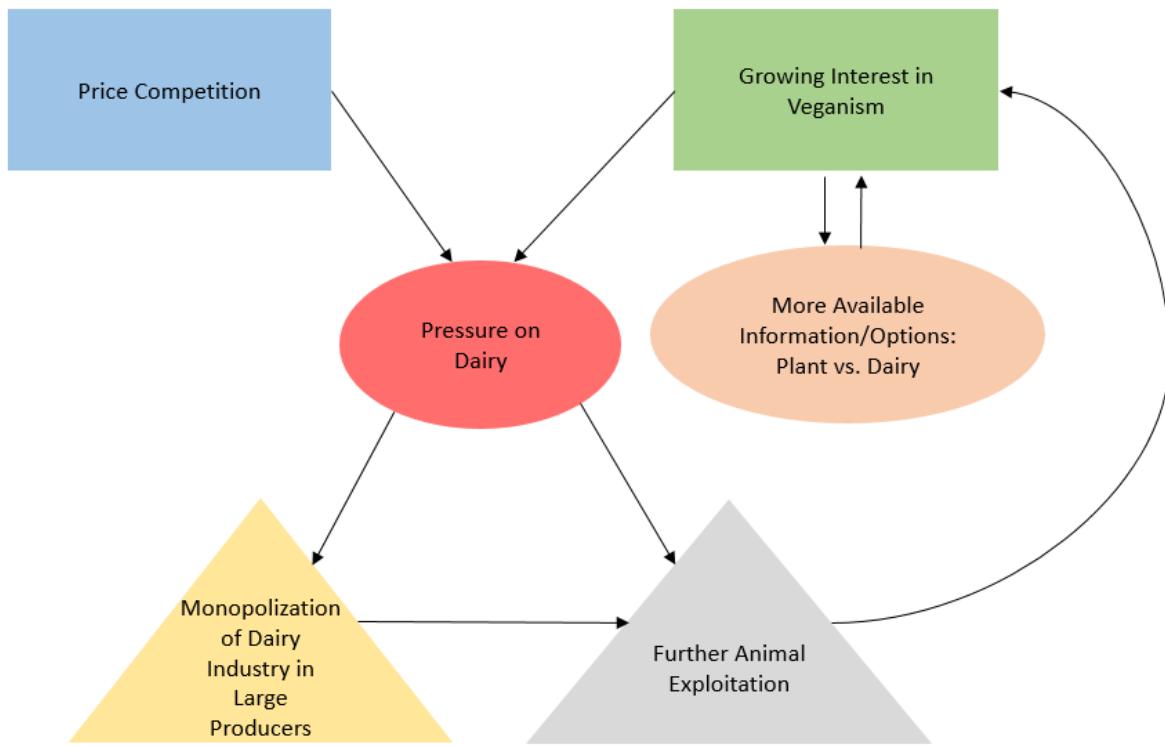
Large-scale producers tend to draw on practices involving the least humane treatment and grossest exploitation of animals under their care. Smaller producers may result to similar tactics to cut costs and keep pace with price competition, or fall off the market completely.

As large-scale producers dominate the market, the case for cutting dairy entirely, as opposed to buying locally, which might not be an available option or might be corrupted, becomes more compelling. Subsequently, as information is more readily circulated and the trend towards veganism continues, further pressure on the dairy industry will either further monopolize the industry or prompt a revolution of 'ethical' milk producers.

The following diagrams show two future scenarios for the dairy industry in the UK. In the first, dairy continues to suffer from price competition, monopolizations and declining sales. In the second, the dairy industry adapts to ethical and plant-based alternatives to find an equilibrium in a growing market of conscious consumers.

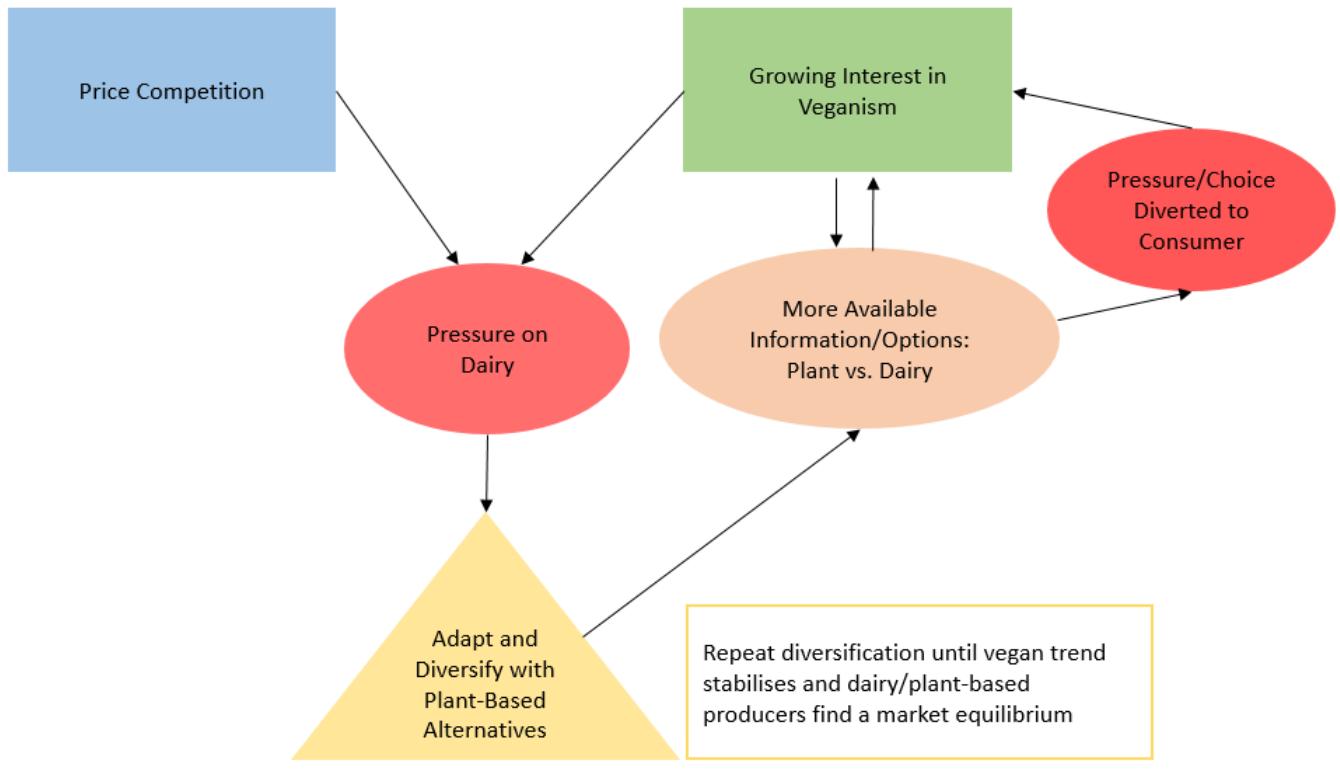
*'Pressure on the dairy industry comes from both the growing interest in alternatives, and...from steep price competition.'*

## Feedback Loop: Dairy in the United Kingdom



*Dairy industry suffers with building pressure.*

## Scenario: Diversification of UK Dairy Market



*Dairy adapts to stabilize market.*

## 8.2 Prospects: The UK and Europe

To stay ahead of the curve, producers can offer ethical, high-protein, plant-based alternatives. The following are three key areas alternatives to the dairy market in the UK and Europe can make a splash:

- **High protein yoghurt** is expected to grow among consumers in the UK keen to increase consumption of high protein, low fat foods from natural and vegetarian food as part of the wider health and wellness trend. High-protein yoghurt and high-protein quark are expected to grow and compete. *Arla Skyr* has had success pioneering high protein yoghurts and quark containing dairy.<sup>44</sup> Vegan additions to this market could be very well received.
- **Pea, rice and seed based proteins** are cheaper to produce and to purchase than whey protein and have gained popularity among athletes and health conscious consumers.<sup>45</sup> However, these plant-based proteins are still not produced with the same grams of protein/calorie ratio as whey protein products and are not yet as appealing for some. Producing a plant-based protein with competitive protein/calorie ratio would serve as a massive asset to an increasingly health and fitness conscious market.
- **Baking products.** Success of baking shows in the UK in the 2014-2015 period prompted a spike in cookbook and baking dairy product sales.<sup>46</sup> It is too early to tell if a trend towards home cooking and baking is a fad or a sustainable trend, but if it lasts vegan-baking products could prove a valuable investment in the coming years, particularly as a younger generation of new vegans matures.

## 9. Conclusion

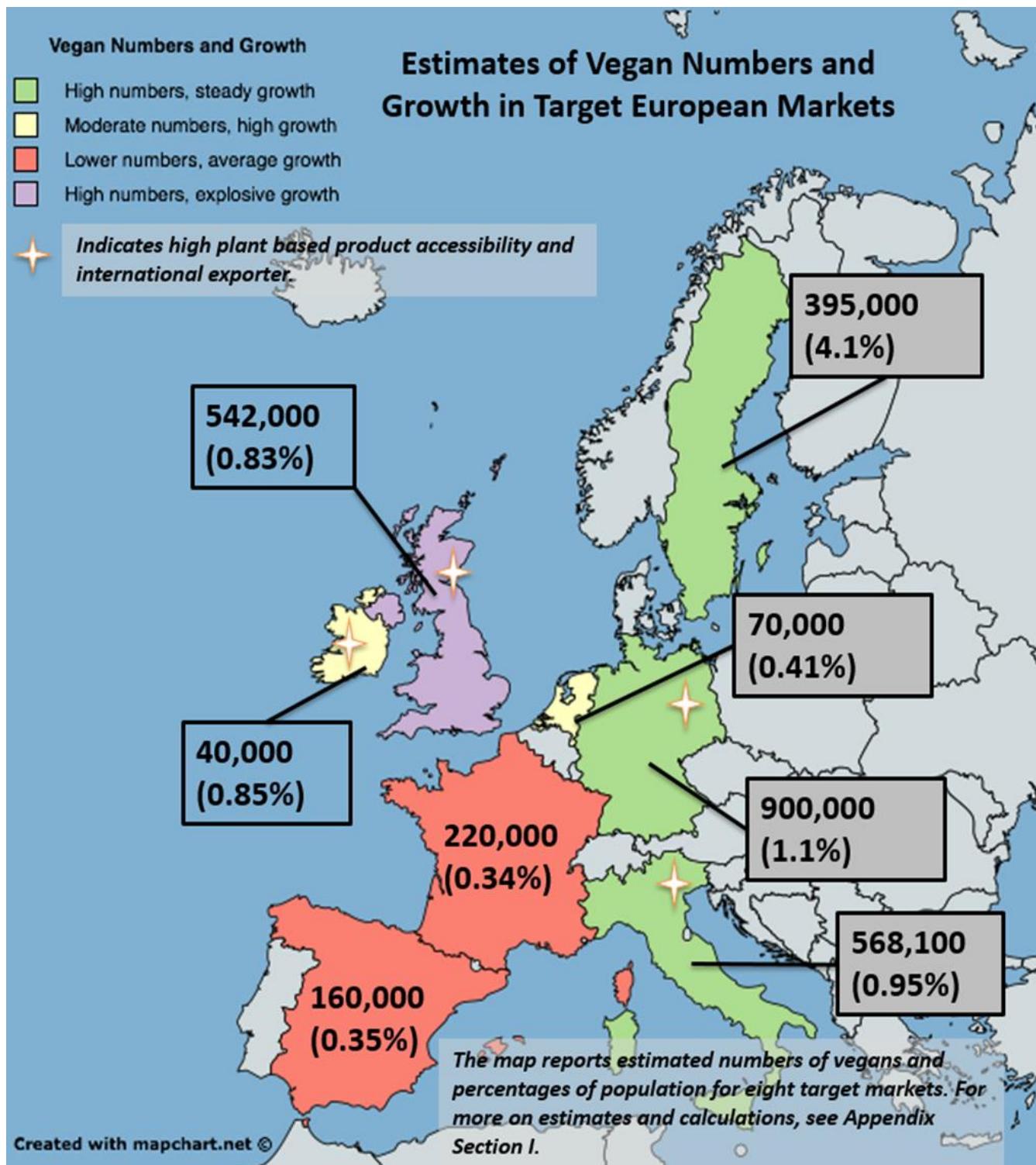
Vegan diets are spreading throughout Europe at increasingly quick rates, as plant-based products rush onto the scene to fill a sudden craze for meat and dairy substitutes. While most people renounce animal products for ethical reasons, and the young are leading the movement, people are also seeing health and fitness benefits and are pleased with the positive impacts a plant-based lifestyle can have on the environmental and potentially, global poverty. Key documentaries and delicious recipes circulating the internet and social media have given more people access to information about animal industries and have painted plant-based alternatives as trendy, with many millionaire celebrities getting on board. The trend should only continue and hasten as greater product availability increases the ease of going plant-based.

<sup>44</sup> Euromonitor, 2013: <http://www.euromonitor.com/dairy-products-in-united-kingdom-isic-152/report>

<sup>45</sup> Euromonitor, 2012: <http://blog.euromonitor.com/2012/03/moo-ve-over-milk-plant-alternatives-primed-to-benefit-from-protein-supplement-demand.html>

<sup>46</sup> Euromonitor, 2013: <http://www.euromonitor.com/dairy-products-in-united-kingdom-isic-152/report>

## 10. The Map



## 11. Appendix

### 11.1 The Map

Estimates for numbers of vegans were taken from available information and studies from Vegan Societies in the respective countries. All estimates were from 2014 or later. For the UK, the Netherlands, and Germany, estimates were collected in numbers of vegans from the authoritative sources in each countries and percentages were then calculated based on current population data from Worldometers. For Italy and Sweden, numbers were calculated based on reported percentages and population data. For France, Spain and Ireland, there was no available and current data on numbers of vegans. The study calculated vegan estimates based on reported number of vegetarians and qualitative survey and interview information. The study estimated France and Spain, which show a rise in *flexitarians* but limited support for vegans, yield about one vegan for every 12 vegetarians, whereas in Ireland, the number of vegans in a sample of vegetarians in about one in six, closer to the average for countries in Northern Europe. Taking together these ratios, with available data on vegetarians and population figures, the study was able to estimate number of vegans and population percentages.

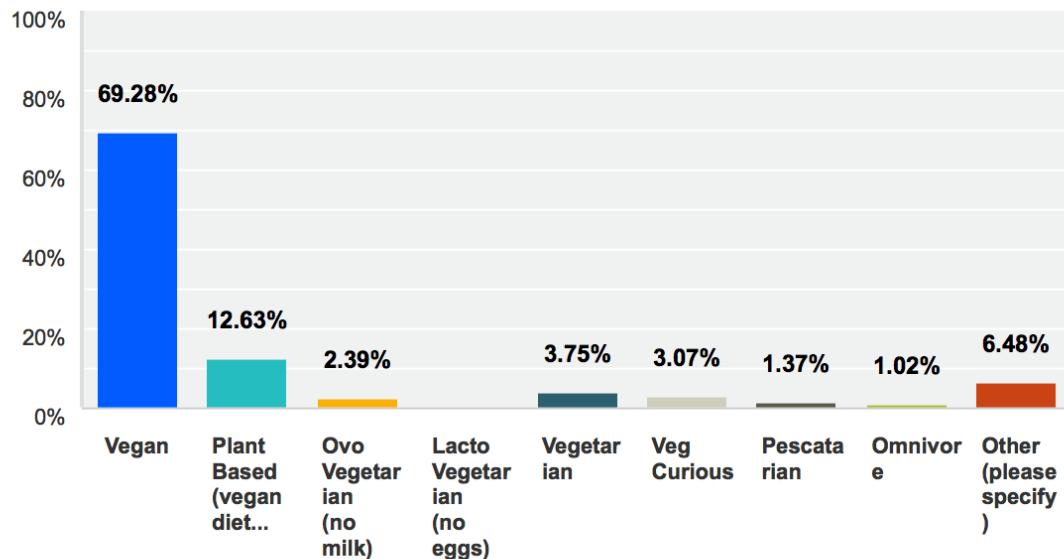
Colour codings took into account energy of the plant based movement, as well as numbers of vegans in light of population size. The UK was singled out for leading Europe in vegan traffic in the media, for efforts to rebrand the movement as mainstream and for a reported 350% growth in the last decade. Although the Netherlands and Ireland do not have as many vegans as other European nations, they show promising numbers and growth given population size. By contrast, Spain and France are more resistant to the trend.

### 11.2 Additional Survey Data

The following are additional charts and data from the study not included in the report that might be interesting to the reader. They summarise findings across countries and across all respondents.

## How would you describe your diet?

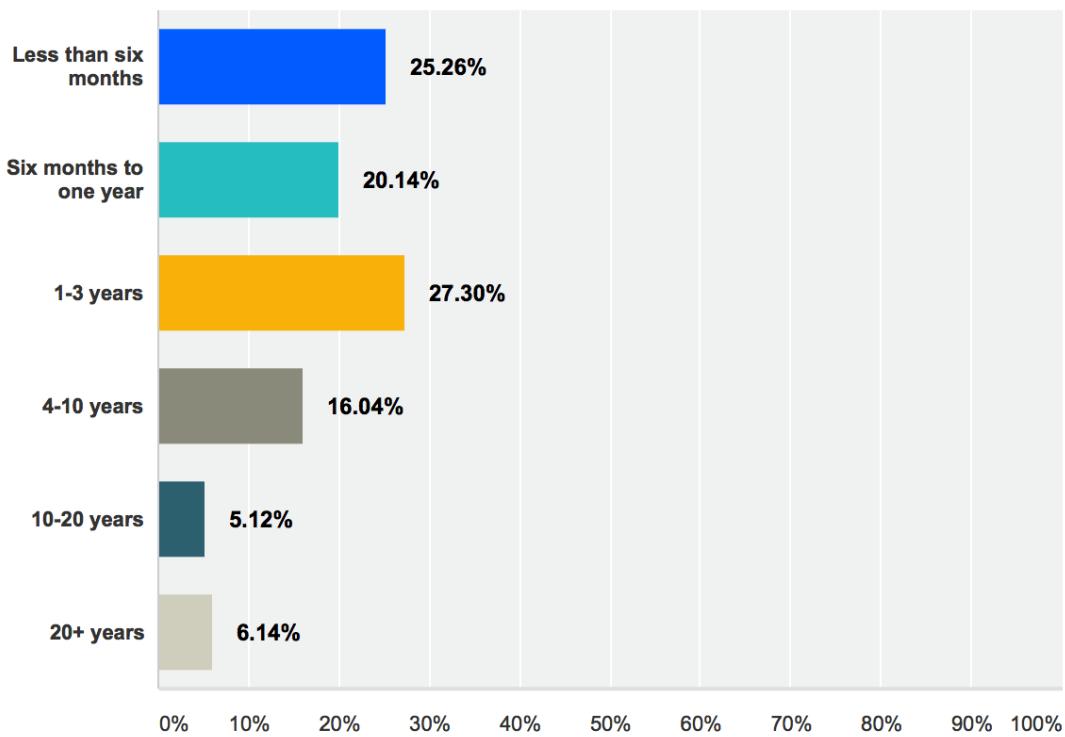
Answered: 293 Skipped: 0



Answer Choices	Responses
▼ Vegan	69.28% 203
▼ Plant Based (vegan diet, but might wear leather etc.)	12.63% 37
▼ Ovo Vegetarian (no milk)	2.39% 7
▼ Lacto Vegetarian (no eggs)	0.00% 0
▼ Vegetarian	3.75% 11
▼ Veg Curious	3.07% 9
▼ Pescatarian	1.37% 4
▼ Omnivore	1.02% 3
▼ Other (please specify)	6.48% 19
Total	293

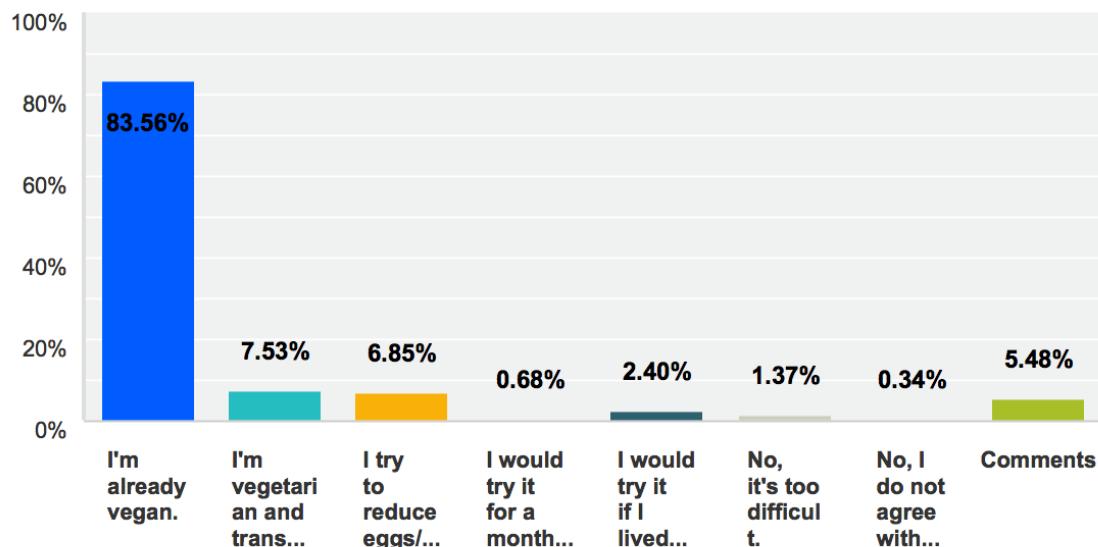
## How long have you eaten this way?

Answered: 293 Skipped: 0



## Would you ever consider going vegan?

Answered: 292 Skipped: 1

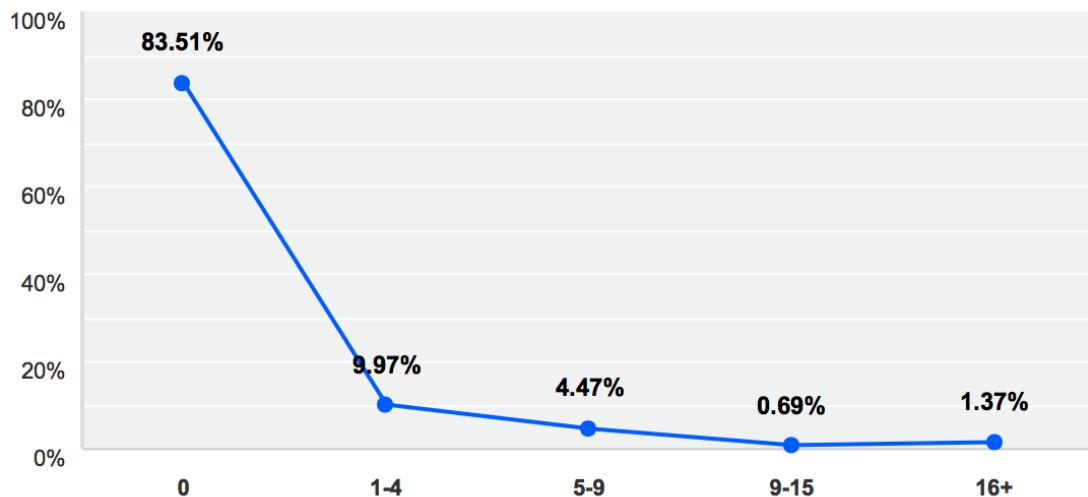


Answer Choices	Responses	
I'm already vegan.	83.56%	244
I'm vegetarian and transitioning.	7.53%	22
I try to reduce eggs/dairy, but not completely cut them out.	6.85%	20
I would try it for a month or so.	0.68%	2
I would try it if I lived somewhere more vegan-friendly.	2.40%	7
No, it's too difficult.	1.37%	4
No, I do not agree with veganism.	0.34%	1
Comments	Responses	5.48%

Total Respondents: 292

## How many meals per week do you consume dairy?

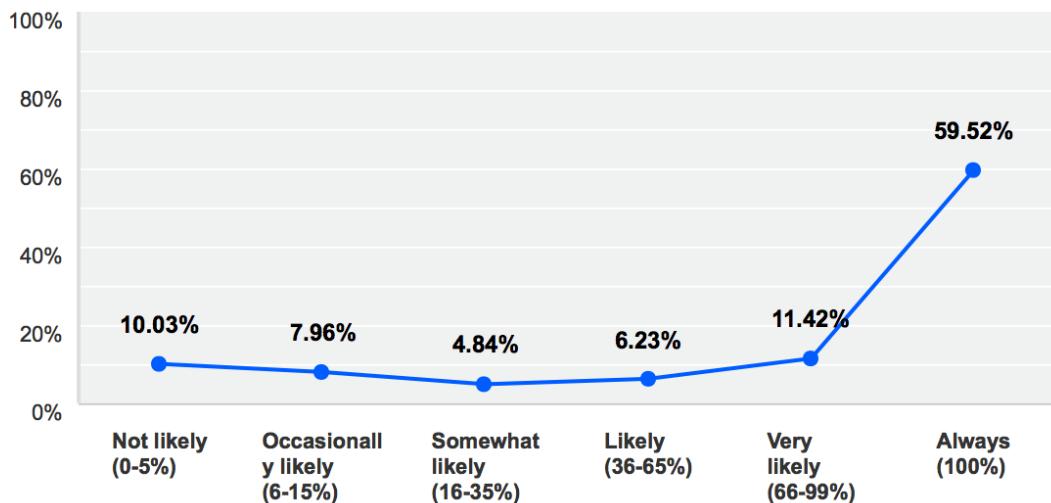
Answered: 291 Skipped: 2



Answer Choices	Responses
0	83.51% 243
1-4	9.97% 29
5-9	4.47% 13
9-15	0.69% 2
16+	1.37% 4
Total	291

## How likely are you to purchase milk and egg substitutes over their animal based counterparts?

Answered: 289 Skipped: 4



Answer Choices	Responses
Not likely (0-5%)	10.03% 29
Occasionally likely (6-15%)	7.96% 23
Somewhat likely (16-35%)	4.84% 14
Likely (36-65%)	6.23% 18
Very likely (66-99%)	11.42% 33
Always (100%)	59.52% 172
Total	289

**What is the dietary makeup of your household? Tell us how many people in your household (including you) are vegan or plant based by filling in the chart.**

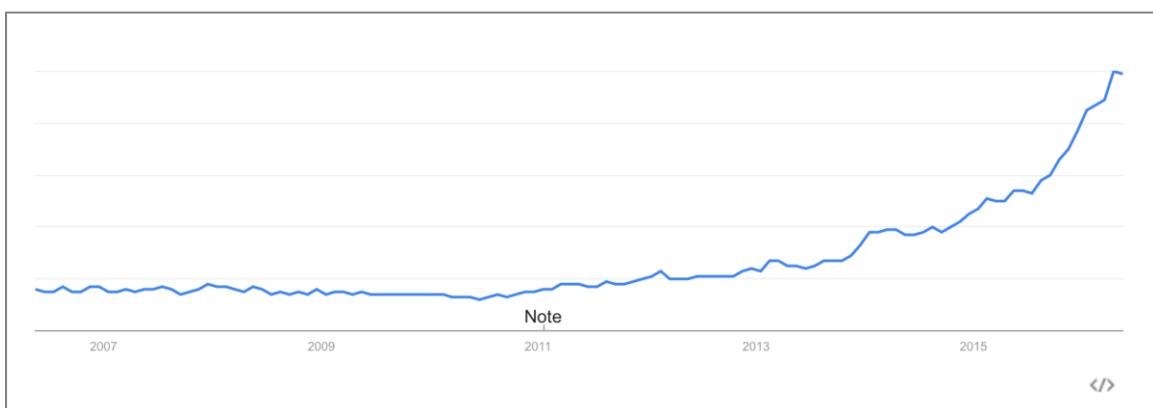
Answered: 293 Skipped: 0

	1	2	3	4	5	6+	Total	Weighted Average
▼ Vegan	<b>69.82%</b> 155	<b>26.13%</b> 58	<b>3.15%</b> 7	<b>0.45%</b> 1	<b>0.45%</b> 1	<b>0.00%</b> 0	222	1.36
▼ Plant Based (vegan diet, but may wear leather etc.)	<b>71.43%</b> 40	<b>23.21%</b> 13	<b>3.57%</b> 2	<b>0.00%</b> 0	<b>1.79%</b> 1	<b>0.00%</b> 0	56	1.38
▼ Ovo Vegetarian (no milk)	<b>92.31%</b> 24	<b>7.69%</b> 2	<b>0.00%</b> 0	<b>0.00%</b> 0	<b>0.00%</b> 0	<b>0.00%</b> 0	26	1.08
▼ Lacto Vegetarian (no eggs)	<b>75.00%</b> 12	<b>12.50%</b> 2	<b>6.25%</b> 1	<b>0.00%</b> 0	<b>6.25%</b> 1	<b>0.00%</b> 0	16	1.50
▼ Vegetarian (eats milk and eggs)	<b>70.67%</b> 53	<b>18.67%</b> 14	<b>8.00%</b> 6	<b>1.33%</b> 1	<b>1.33%</b> 1	<b>0.00%</b> 0	75	1.44
▼ Veg Curious (flexible or temporary)	<b>76.47%</b> 39	<b>15.69%</b> 8	<b>7.84%</b> 4	<b>0.00%</b> 0	<b>0.00%</b> 0	<b>0.00%</b> 0	51	1.31
▼ Pescatarian	<b>72.97%</b> 27	<b>18.92%</b> 7	<b>0.00%</b> 0	<b>5.41%</b> 2	<b>2.70%</b> 1	<b>0.00%</b> 0	37	1.46
▼ Omnivorous	<b>35.95%</b> 55	<b>37.91%</b> 58	<b>14.38%</b> 22	<b>9.80%</b> 15	<b>1.31%</b> 2	<b>0.65%</b> 1	153	2.05

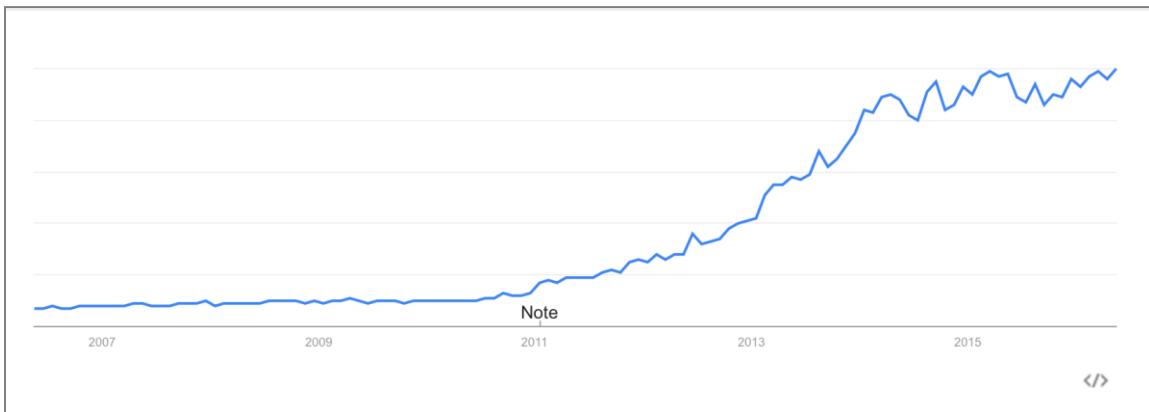
## 11.3 Google Trends Diagrams

The report references interest in veganism through Google Trends analysis. Below are the Google Trends diagrams scaling web searches for 'vegan' for each country from 0 to 100 to show the change in interest over time. When relevant, search data for 'vegan' in the countries native language were also shown, but many Europeans are searching for vegan information in English.

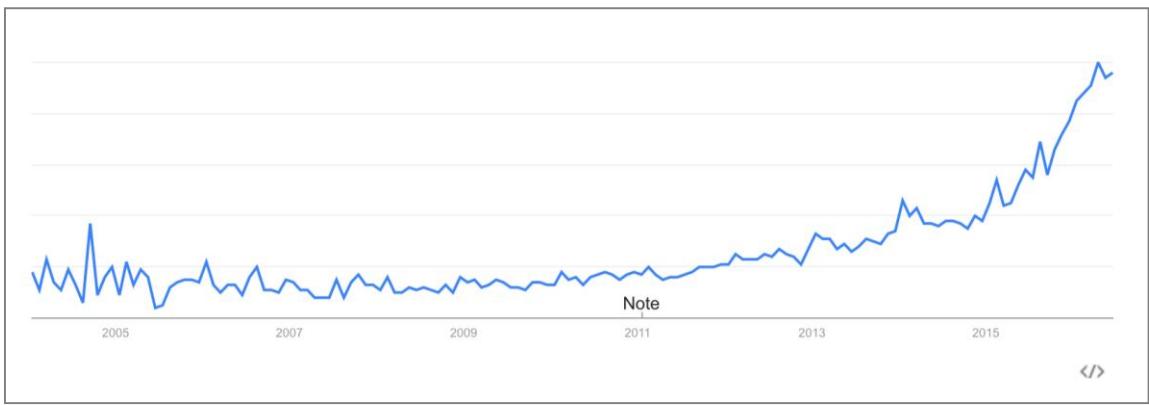
### UNITED KINGDOM



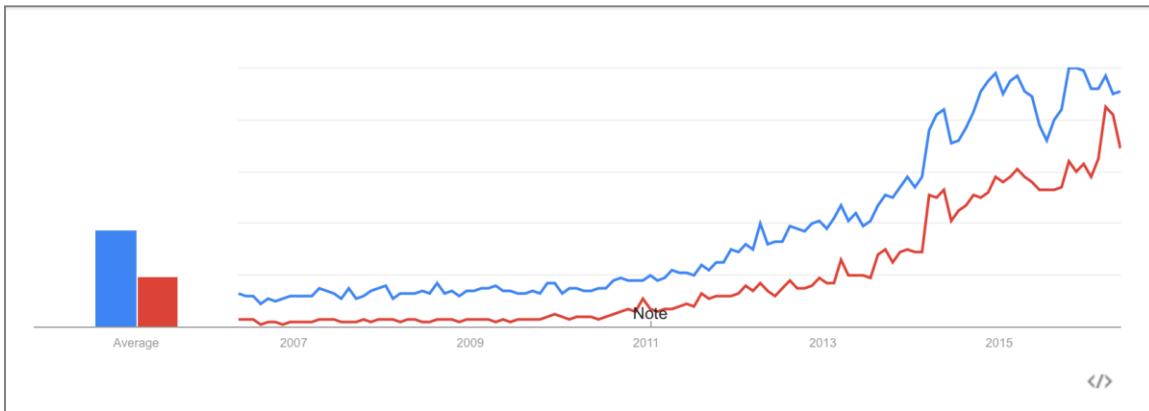
## GERMANY



## IRELAND

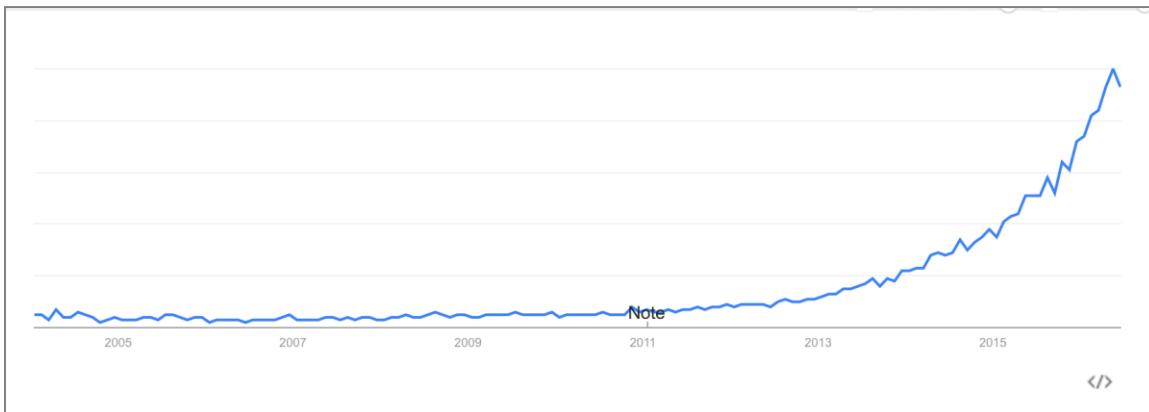


## ITALY

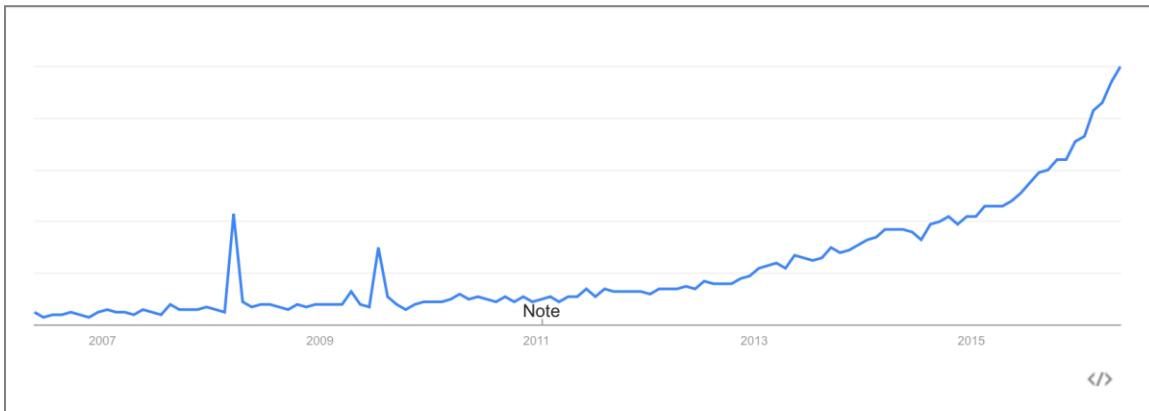


Search terms: blue 'vegan', red 'vegano'

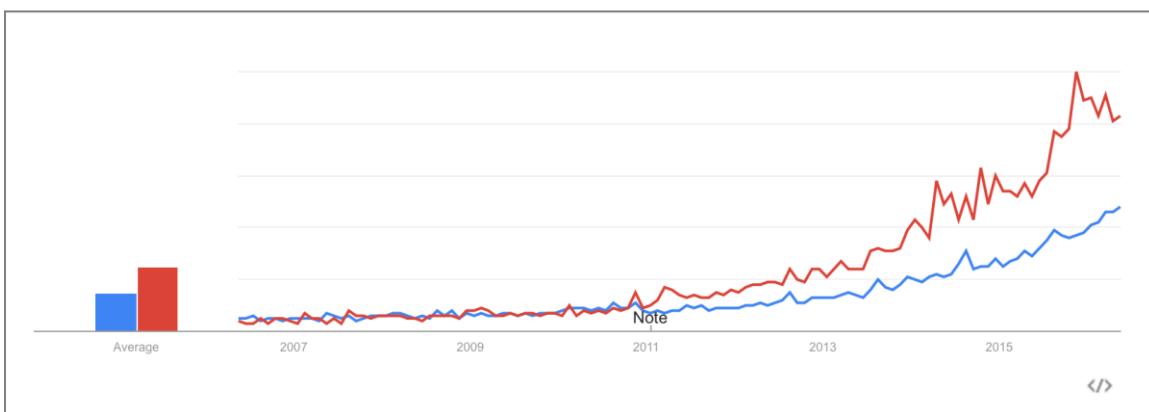
## FRANCE



## NETHERLANDS



## SPAIN



Search terms: blue 'vegan', red 'vegano'

## SWEDEN

