

*Taste*

*Price*



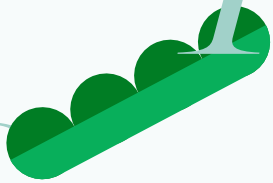
**Optimism**

&

**Obstacles**



*Habit*



*Convenience*

*Health*



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# Introduction

The 2024 EAT-GlobeScan *Grains of Truth* report provides insights into the shifting landscape of global food systems from the perspective of consumers.

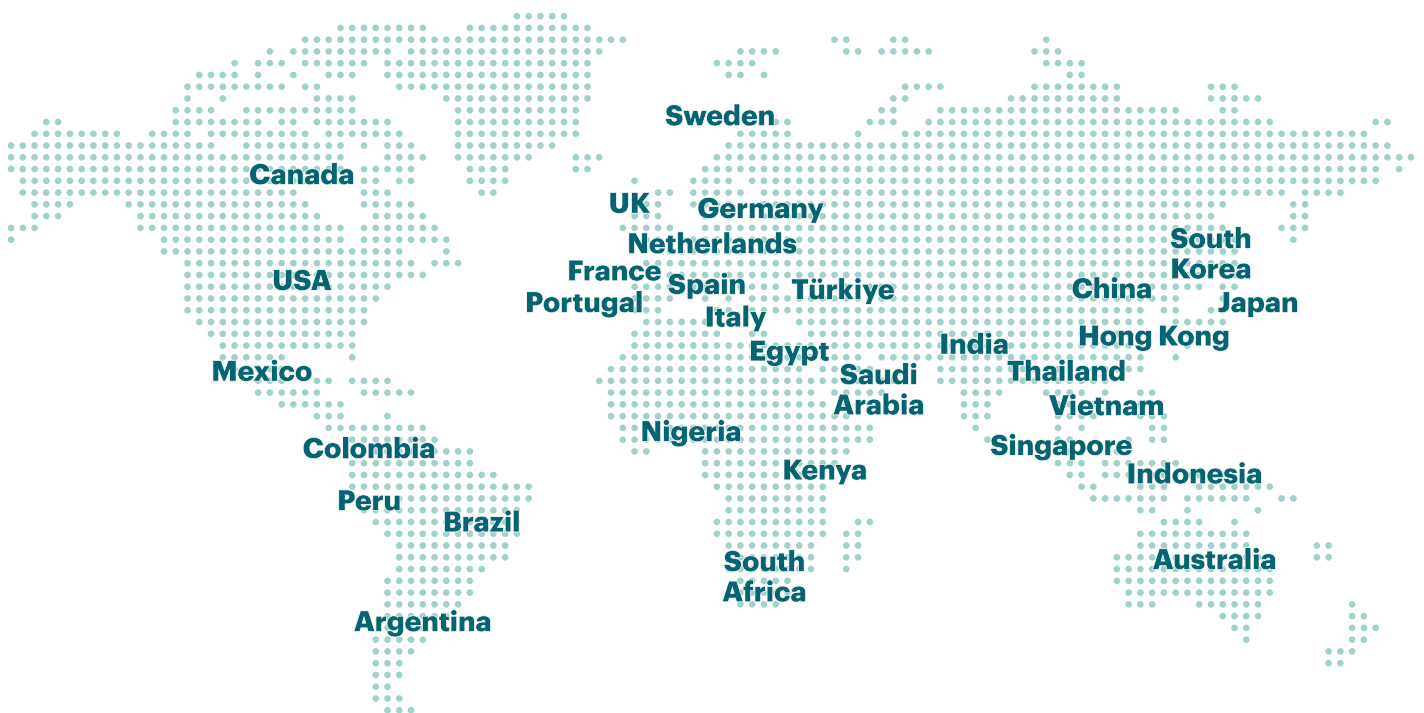
With rising interest in plant-based diets, many consumers are beginning to rethink their eating habits and preferences.

Unfortunately, the road to widespread adoption in many countries is hindered by prevailing challenges – economic pressures, flavor concerns, and regional differences that are ultimately slowing progress.

This 2024 survey captures both the optimism and the obstacles, revealing progress and challenges to a world that sits on the edge of a dietary transformation.

## Methodology Summary

- Representative online samples of approximately 1,000 adults in each of 31 markets (500 each in Hong Kong, Kenya, Nigeria, and Singapore, and 1,500 in Brazil and USA) ( $n=30,216$ ).
- Samples are representative of online population, weighted to reflect general population census data.
- Online surveying in July and August 2024.



## Chapter 1

# A Stalled Transformation

The desire for plant-based foods is evident.

Across the globe, consumers are expressing an interest in reducing their consumption of animal products.

While 68 percent of people globally say they are interested in eating more plant-based foods, only 20 percent regularly do so. This proportion has declined from 23 percent in 2023, suggesting that enthusiasm alone will not drive a shift to plant-based diets.

Rising costs, a perceived lack of flavor, and a lack of affordability are major roadblocks.

- Frequent plant-based food consumption has decreased at the global level from 23 percent in 2023 to 20 percent in 2024.
- More than two-thirds of people globally (68%) indicate they would like to eat more plant-based foods.
- More than four in ten (42%) cite price as a barrier to eating more plant-based foods while over one-third (35%) cite flavor.

- 59 percent say flavor/taste influences their food choices very much, followed by health (55%) and price (54%).

### The Takeaway

As food prices climb, many consumers – especially in North America and Europe – are returning to cheaper, familiar foods.

Plant-based options remain out of reach for many, forcing a rethink of how these foods are priced and made available.

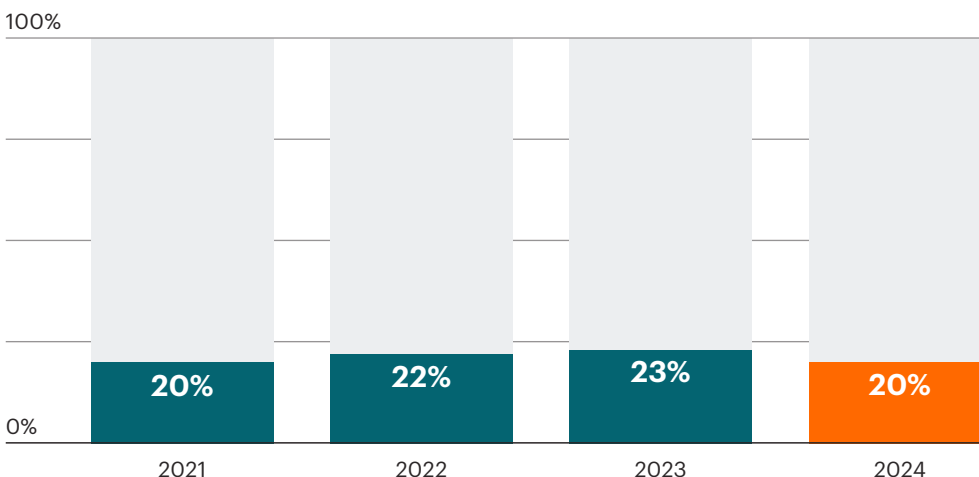
The global cost-of-living crisis has made it clear that if plant-based diets are to become mainstream, they need to be affordable.

Governments and food companies must explore ways to bring down the cost of plant-based products. Subsidies for producers and tax incentives for consumers could make a significant difference, especially in regions like North America and Europe where price is the most significant barrier.

The frequency of healthy and plant-based food consumption **has remained steady** over the past few years, with a slight decline in both categories compared to 2023

Frequency of Plant-based Food Consumption

"Most" and "All of the Time," Average of 23 Markets,\* 2021–2024

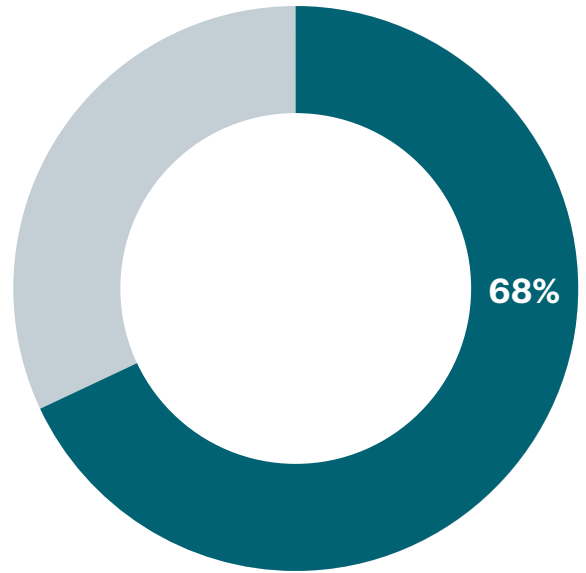


\*For consistent tracking, this chart only includes Argentina, Australia, Brazil, Canada, China, France, Germany, Hong Kong, India, Italy, Indonesia, Japan, Kenya, Mexico, Nigeria, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Türkiye, UK, and USA.

# Nearly **seven in ten** express interest in eating more plant-based foods

## Interest in Eating More Plant-based Foods

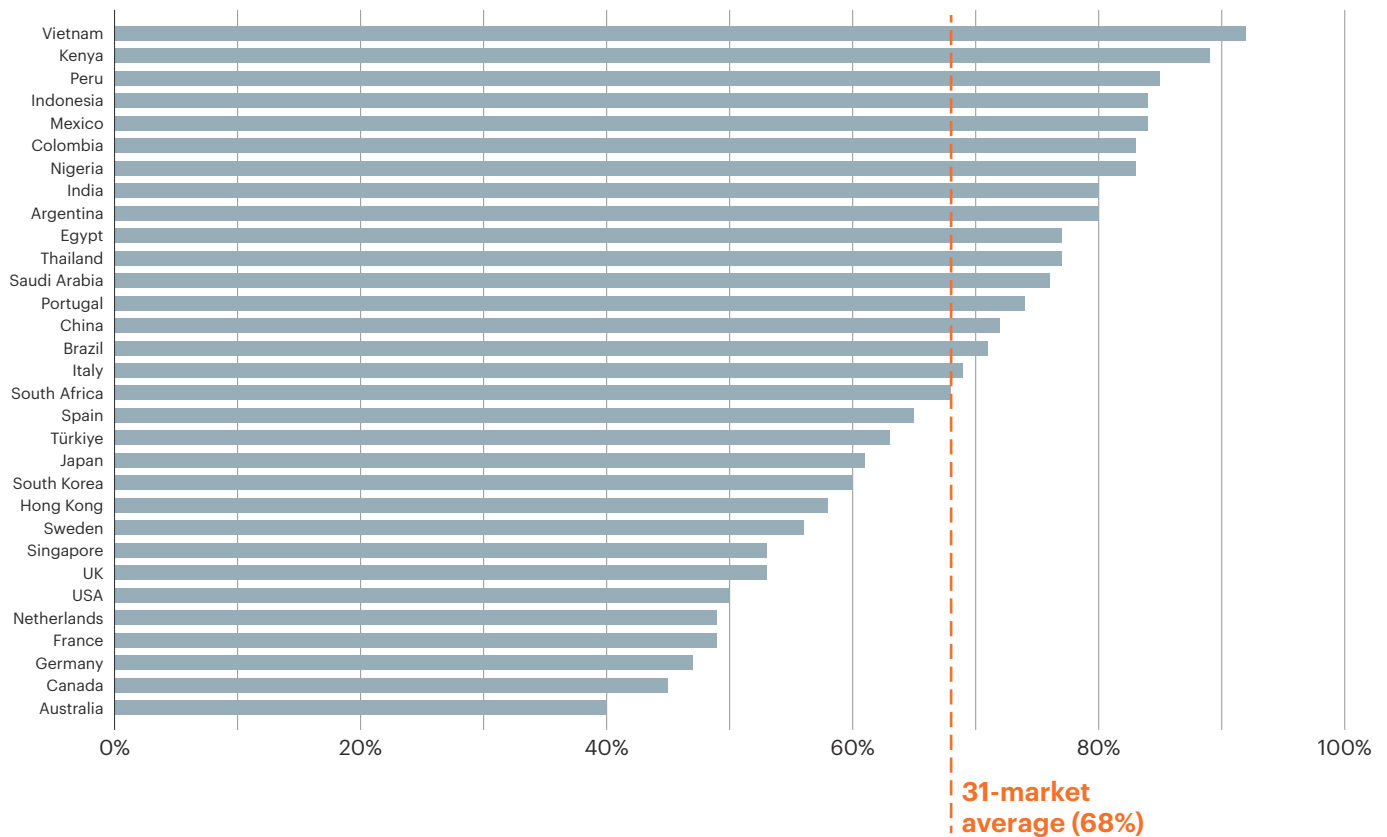
"Yes," Average of 31 Markets, 2024



# Interest in **eating more plant-based foods varies** across the markets surveyed

## Interest in Eating More Plant-based Foods

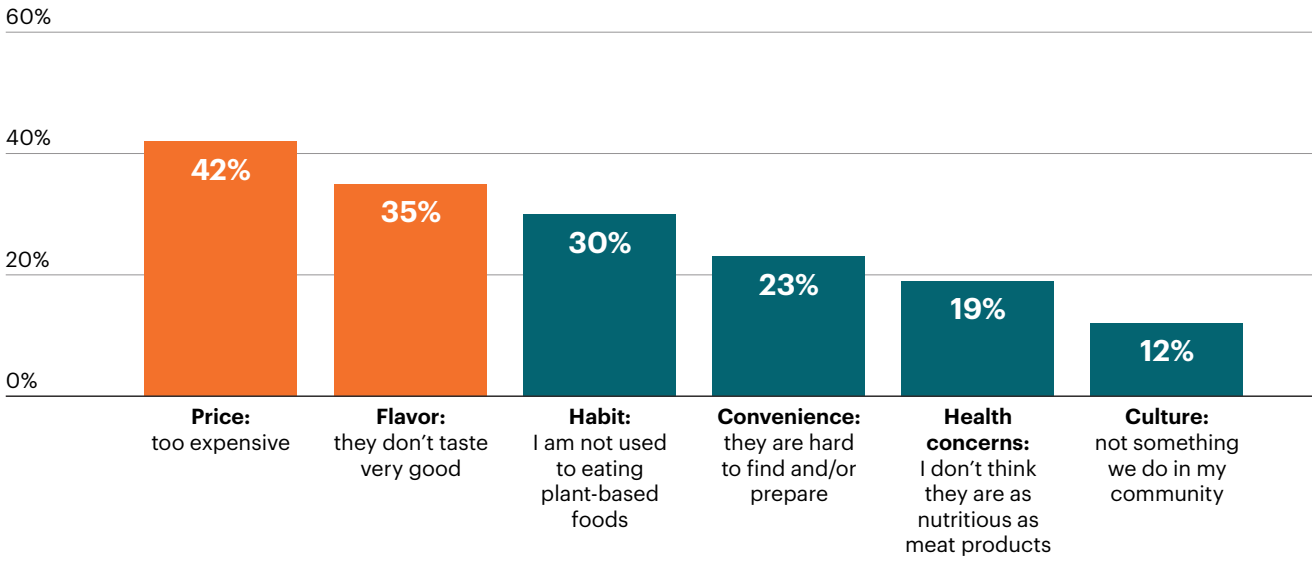
"Yes," by Market, 2024



# Perceived **high price** and **lack of flavor** are the **top barriers** to more plant-based food consumption

## Barriers to Eating More Plant-based Foods

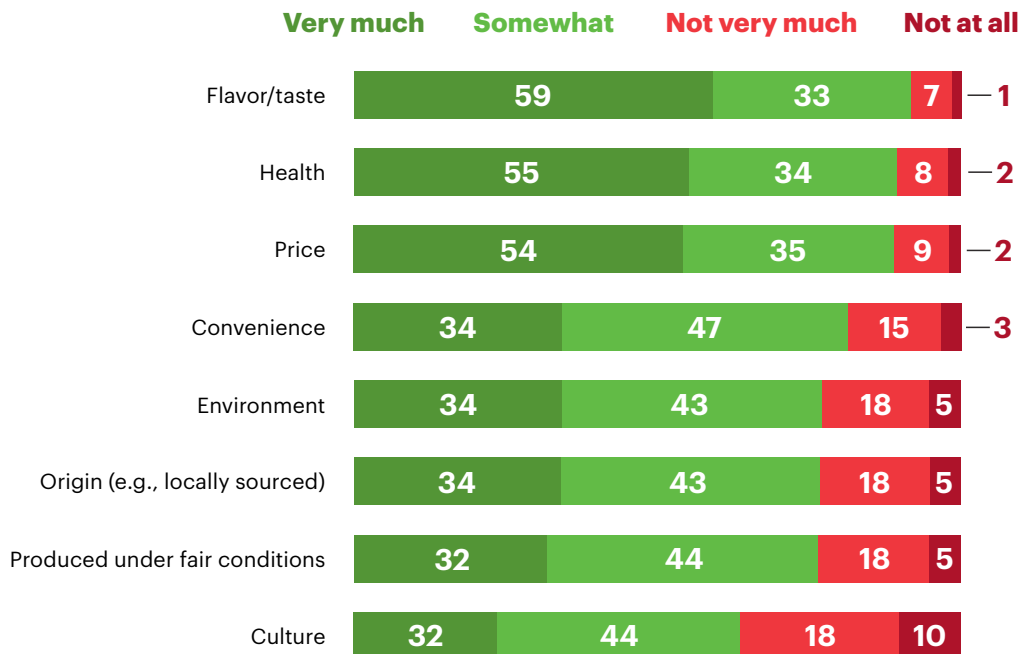
Average of 31 Markets, 2024



# **Taste, health, and price** are the top three factors influencing food choices overall

## Factors Influencing Food Choices

Average of 31 Markets, 2024



## Chapter 2

# Generational Divides and the Promise of Youth

Across the world, younger generations are taking the lead in reshaping diets.

Seventy-two percent of Millennials, especially those with children living at home, are interested in plant-based foods, but even among these younger, eco-conscious groups, action often falls short of intent.

For every person who aspires to switch to a plant-based diet, many are held back by affordability, flavor, habit, and convenience concerns.

Baby Boomers, meanwhile, are more focused on consuming healthy foods but are less likely to embrace the idea of replacing meat with plants.

- As in previous years, Baby Boomers and older are most likely to say they consume healthy food frequently whereas Gen Z and Millennials are more inclined toward plant-based diets.
- However, consumption of vegetarian and vegan diets has decreased among Millennials and Gen X compared to 2023, while remaining steady among Gen Z and Baby Boomers and older. Millennials are the most interested in eating more plant-based foods (72%) while Baby Boomers and older are much less likely to agree (58%); a majority of this oldest age group are still open to making this switch.

- Price is the top barrier to eating a more plant-based diet for all generations, but more so for Gen X (44%) and Baby Boomers and older (43%).
- Baby Boomers and older are the most likely to say that flavor prevents them from switching to a plant-based diet (38% vs 33% for Gen Z).

### The Takeaway

Despite these generational differences, the data reveal a clear appetite for change – if the obstacles can be addressed.

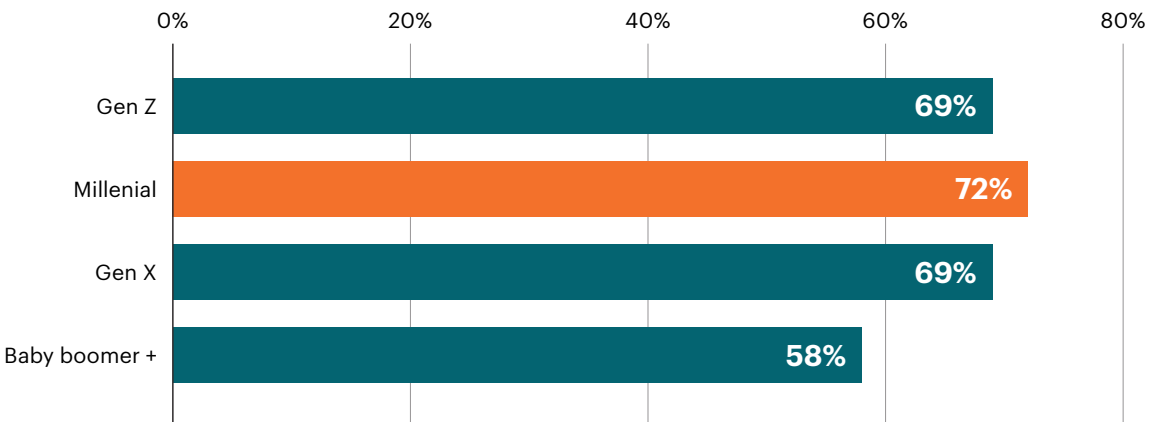
The plant-based food sector has made strides in developing new products, but more needs to be done to tackle the persistent concerns about flavor and texture, a prominent barrier to adopting more plant-based diets, especially for older people.

Investment in research and development coupled with a focus on cultural food preferences will be key to creating products that meet consumers' tastes and expectations.

**Millennials** – many with young families of their own – are the most interested in eating more plant-based foods; older people express much less interest

Interest in Eating More Plant-based Foods

“Yes,” by Generation, Average of 31 Markets, 2024

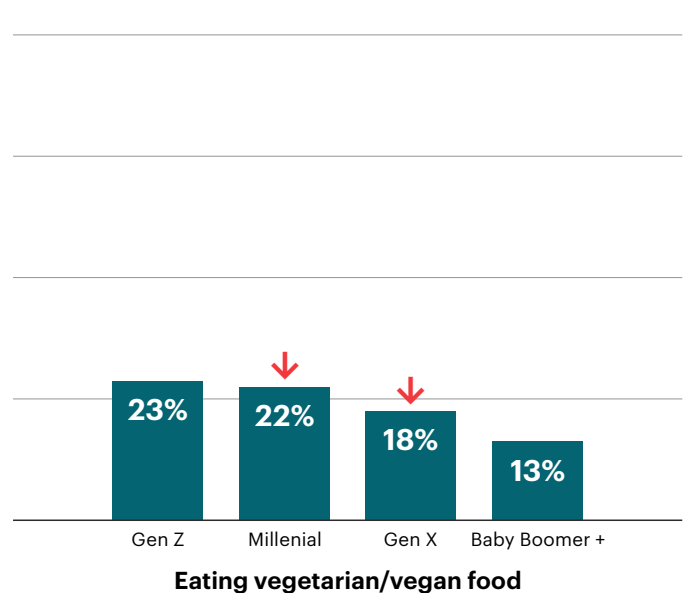
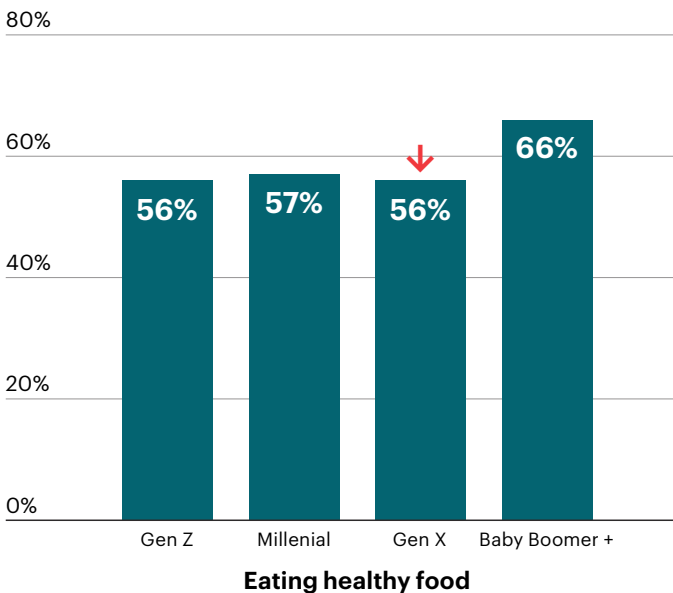


**Baby Boomers** are more likely to consume healthy food frequently, while Gen Z and Millennials are more likely to follow a plant-based diet

Frequency of Healthy and Plant-based Food Consumption

“Most” and “All of the Time,” by Generation, Average of 31 Markets, 2024

↓ Decreased by 5 points or more compared to 2023

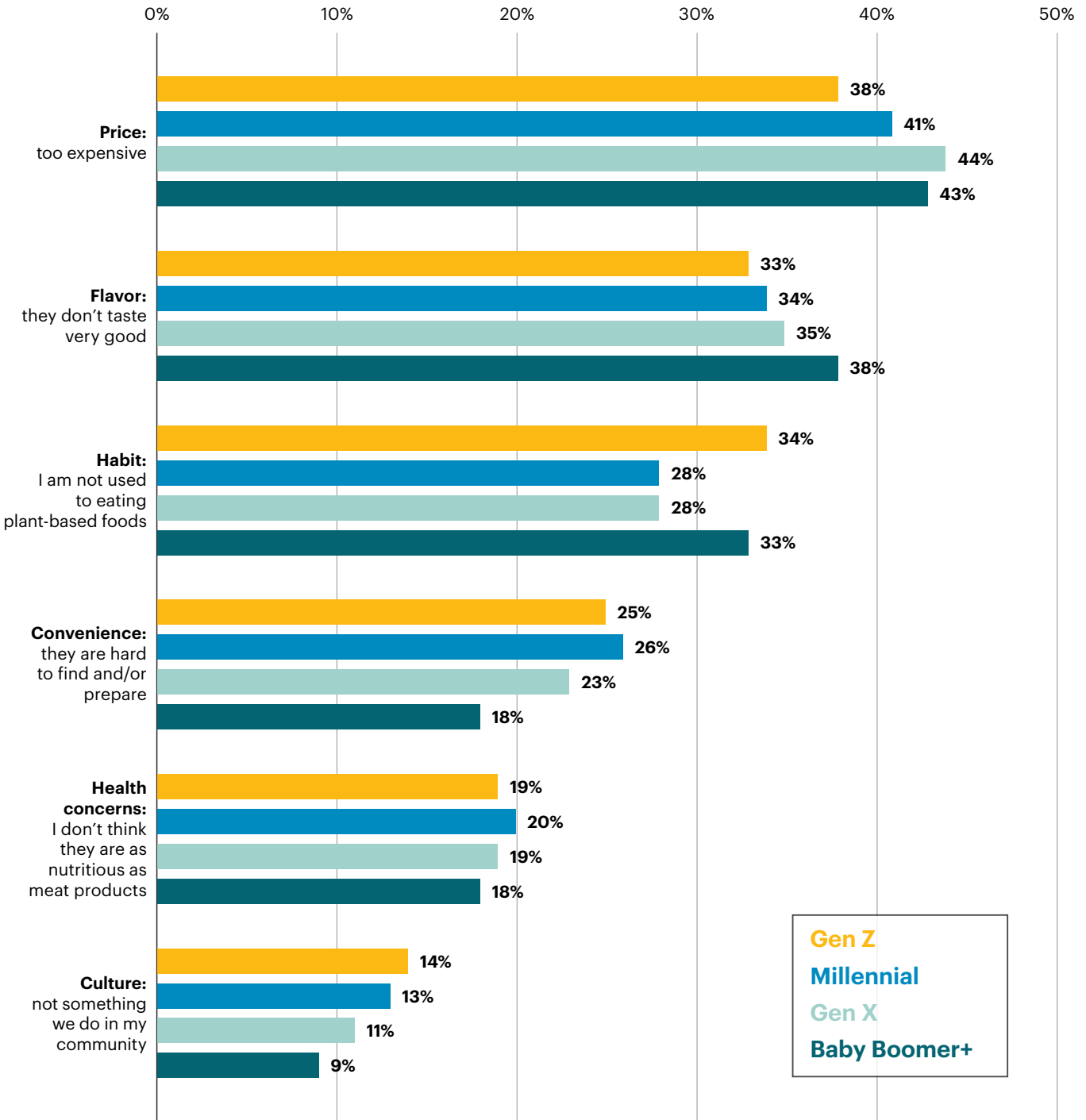




# Perceived **high price** and **lack of flavor**, along with a **lack of habit**, are the top barriers to more plant-based food consumption for all generations

## Barriers to Eating More Plant-based Foods

By Generation, Average of 31 Markets, 2024



## Chapter 3

# Barriers across Regions and a World of Contrasts

Although barriers to plant-based food consumption differ around the world, price is the top barrier everywhere.

In Asia-Pacific, where sustainability is often seen as a priority, nutritional concerns – particularly in countries like China and Vietnam – also make people wary of plant-based alternatives.

Consumers in these countries want reassurance that plant-based products will meet their nutritional needs.

However, price is an even bigger hurdle for people in Europe and North America compared to those in other regions. Even consumers who care about environmental sustainability often cannot afford plant-based foods regularly.

Economic instability in regions like Latin America and Africa has compounded the challenges, making it harder for people to prioritize dietary changes amidst broader food security concerns.

### The Takeaway

In parts of Asia-Pacific and Latin America, nutritional concerns remain a significant obstacle.

Public health campaigns that emphasize the health benefits of plant-based diets and dispel myths about their nutritional value could help change the narrative. These campaigns should be localized, addressing specific concerns in each region.

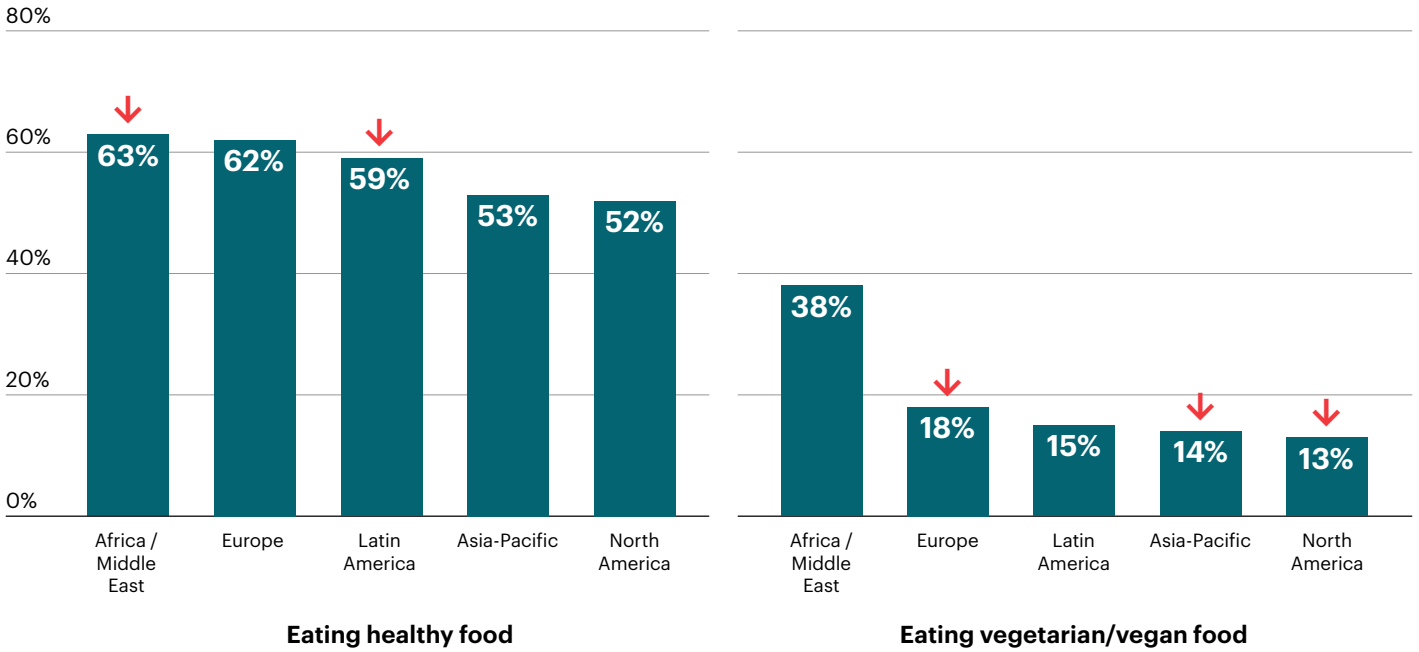
- Plant-based food consumption has declined in Asia-Pacific, Europe, and North America.
- Affordability is the top barrier in all regions, particularly in North America (48%) and Europe (46%).
- People in Asia-Pacific (23%) are more likely than others to say health concerns prevent them from eating a plant-based diet.
- North Americans (45%) are much more concerned with plant-based foods not tasting as good as other options than those in other regions.

# Healthy food consumption has declined in Africa / Middle East and Latin America, while **plant-based food consumption is down** in Asia-Pacific, Europe, and North America

Frequency of Healthy and Plant-based Food Consumption

"Most" and "All of the Time," by Region, 2024

↓ Decreased by 5 points or more compared to 2023

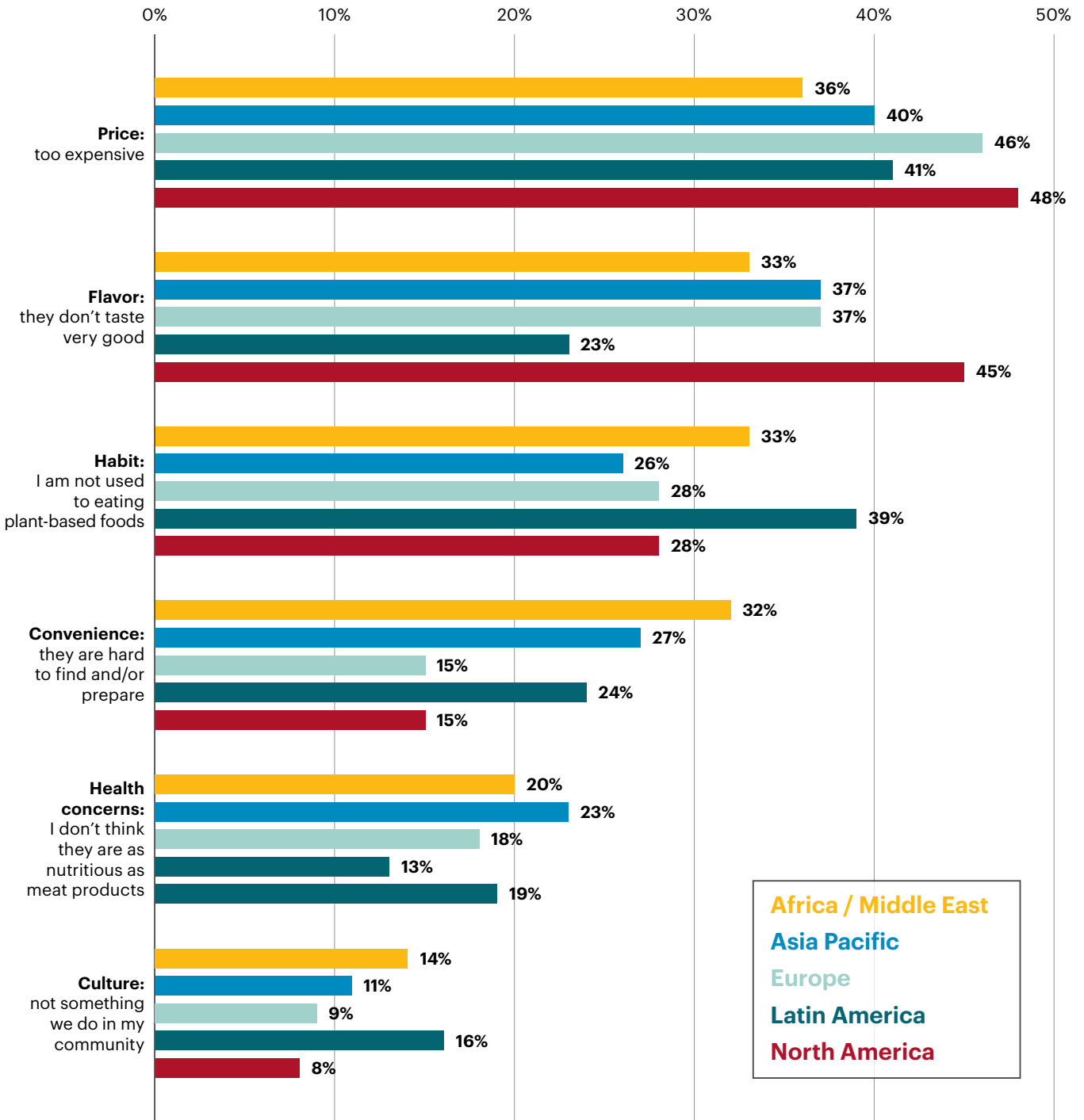


# Price is the top barrier in all regions.

North Americans are much more concerned with plant-based foods not tasting as good as other options than are people in other regions

Barriers to Eating More Plant-based Foods

By Region, 2024



## Chapter 4

# Overcoming Barriers and Looking Ahead

In 2024, sustainability remains a powerful motivator for adopting plant-based diets.

Many consumers understand the environmental benefits of reducing their reliance on animal products.

One-third of global consumers now say they would prefer plant-based alternatives to meat, assuming they taste equally good, have equal nutritional value, and cost the same as real meat.

However, people are now more likely to say they prefer real meat from animals over plant-based alternatives compared to four years ago, highlighting the urgency of better promoting the environmental and health benefits of plant-based options.

Health remains the top reason for reducing meat consumption, but financial considerations now outweigh concerns around animal treatment, again highlighting the impact of the ongoing cost-of-living crisis in many markets.

To help provide a financial incentive for healthy and sustainable diets, large majorities agree that locally sourced, healthy, and sustainable food should be taxed less.

### The Takeaway

There is a clear need for greater transparency and better communication about how plant-based foods contribute to environmental goals as well as human health.

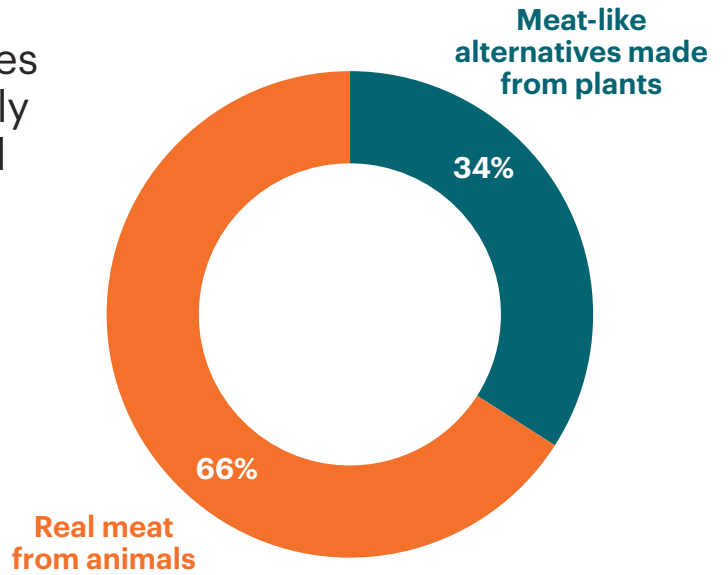
As consumers become more concerned about the environment, they are actively looking for brands they can trust. Clear, transparent labeling and third-party certifications could help build confidence in the sustainability claims of plant-based products.

By creating a clear link between plant-based eating and positive environmental and human health outcomes, brands and policymakers can encourage more consumers to make the switch.

- Latin American consumers tend to be the most open to meat-like alternatives while people in Australia, North America, and Europe show a strong preference for real meat.
- Health is the top reason for reducing meat consumption, but people have become less likely to cite health as a reason to switch to a plant-based diet (41% in 2024 vs 47% in 2020).
- Financial considerations (17%) now outweigh concerns around animal treatment (15%) as a reason to switch to a plant-based diet.
- Almost seven in ten (69%) say it would be better for the world if we eat less meat.
- Two-thirds (67%) agree that the economy has affected their diet in the past year.
- There is also a strong consensus that unhealthy (84%) and unsustainable (83%) food should not be advertised to children.

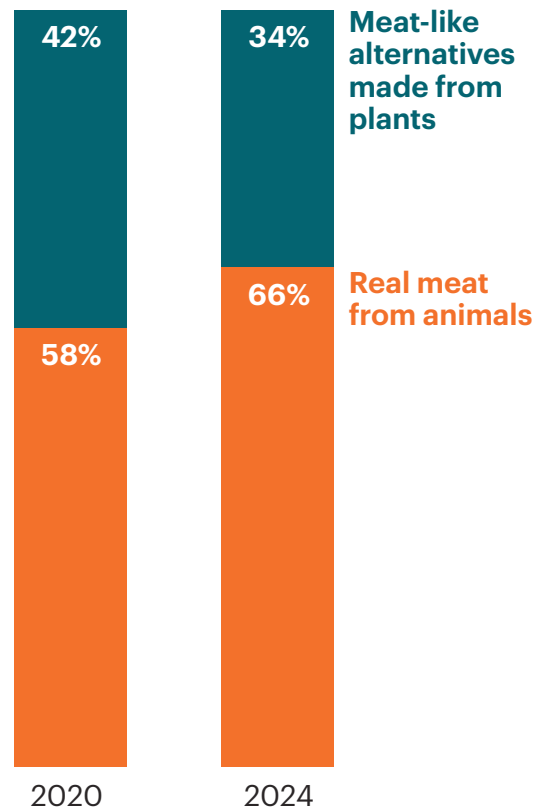
**One-third of global consumers (34%)** prefer plant-based alternatives to meat, assuming they taste equally good and have the same nutritional value and cost as real meat

Preference for Real Meat vs Meat-like Alternatives  
Average of 31 Markets, 2024



However, people are now more likely to say **they prefer real meat from animals over plant-based alternatives** compared to four years ago

Preference for Real Meat vs Meat-like Alternatives  
Average of 26 Markets,\* 2020–2024

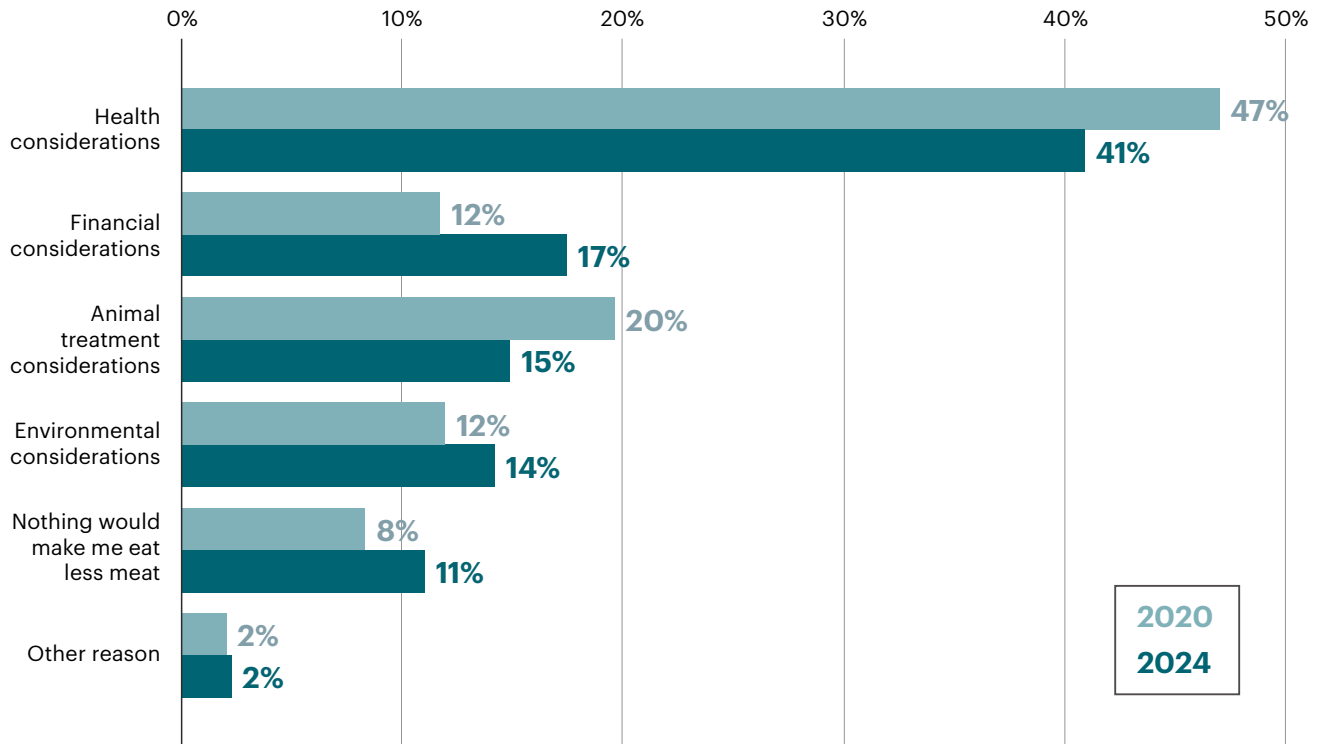


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# Health remains the top reason for reducing meat consumption, however, financial considerations now outweigh concerns around animal treatment

## Reasons for Reducing Meat Consumption

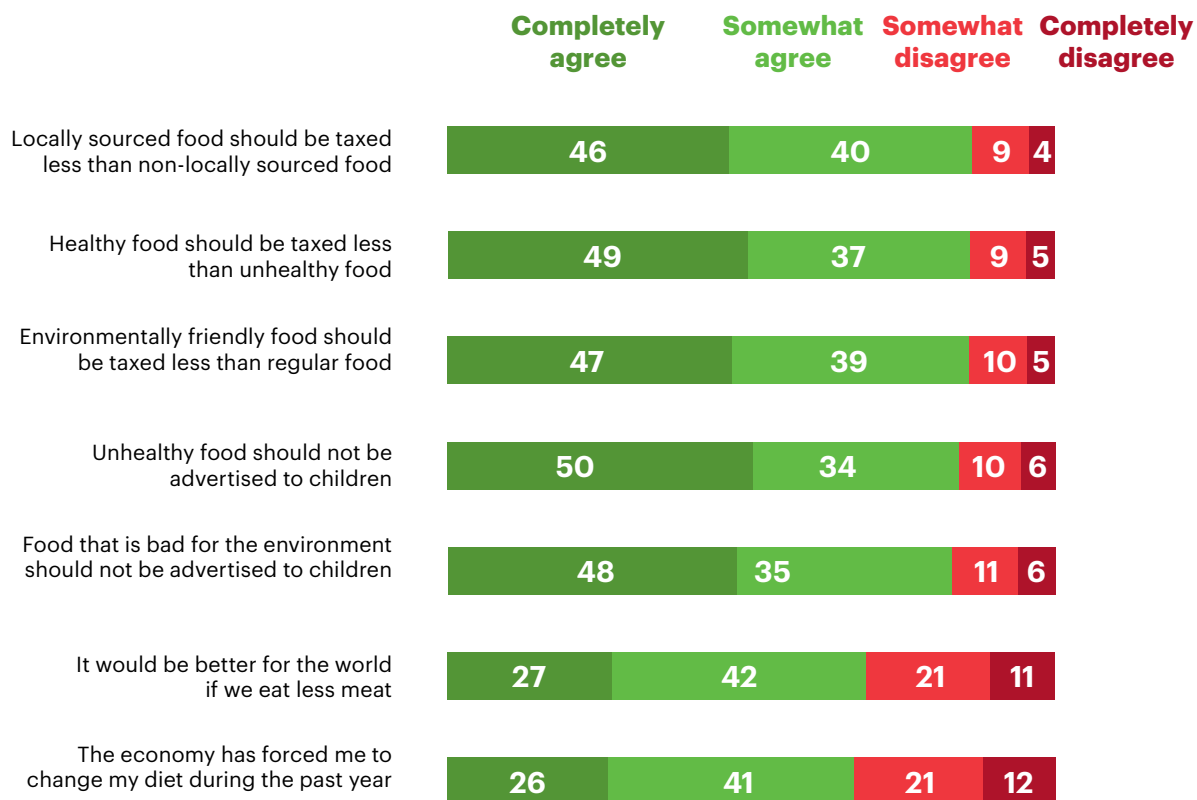
Average of 26 Markets,\* 2020–2024



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# Large majorities agree that locally sourced, **healthy, and sustainable food should be taxed less**, and that **unhealthy and unsustainable food should not be advertised to children**

Attitudes about Food  
Average of 31 Markets, 2024





## Conclusion

# A Time for Action

The 2024 Grains of Truth report paints a complex picture of a world on the cusp of dietary transformation.

Consumers around the world are eager for change, but real barriers – price, convenience, flavor, and trust – continue to impede progress.

If governments, food producers, and consumers work together to remove these obstacles, the shift toward plant-based diets could become a powerful tool in the fight against climate change and food insecurity.

With the right policies and innovations across the public and private sectors, the promise of plant-based diets can be realized and the horizon of a healthy, sustainable, and fair world for all can be reached.



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EAT is a global science-based platform committed to transforming food systems for a healthy, sustainable, and equitable future. Through cutting-edge research, impactful events, and partnerships with diverse stakeholders, EAT drives progress and shapes the global discourse on food system transformation.

A cornerstone of EAT's work is the EAT-Lancet Commission—the first full scientific review defining a healthy diet from a sustainable food system. The second EAT-Lancet Commission, slated for publication in 2025, will provide updated insights and actionable recommendations to accelerate food system transformation.