



Outcomes of the study of the functioning of the meat market for consumers in the EU

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Background

Monitoring of consumer markets from a consumer perspective –
Consumer Scoreboard and in-depth market studies

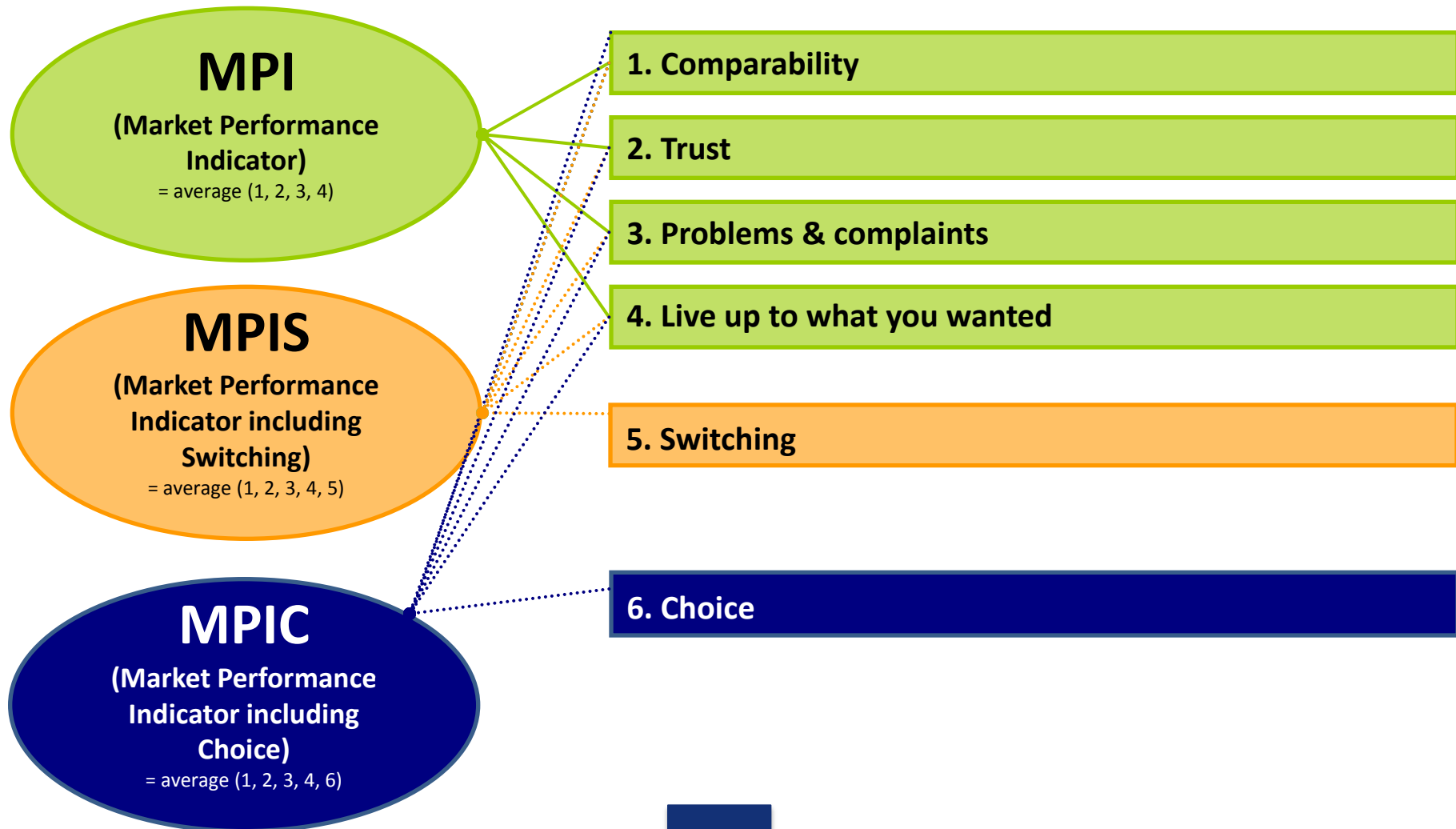
Weaker performance of the meat market in the Consumer Markets
Scoreboard

Ranked particularly low for trust that the retailers/suppliers are
compliant with the consumer protection rules

Market highly regulated at the EU and national levels

4% of the household budget

Consumer market monitoring survey



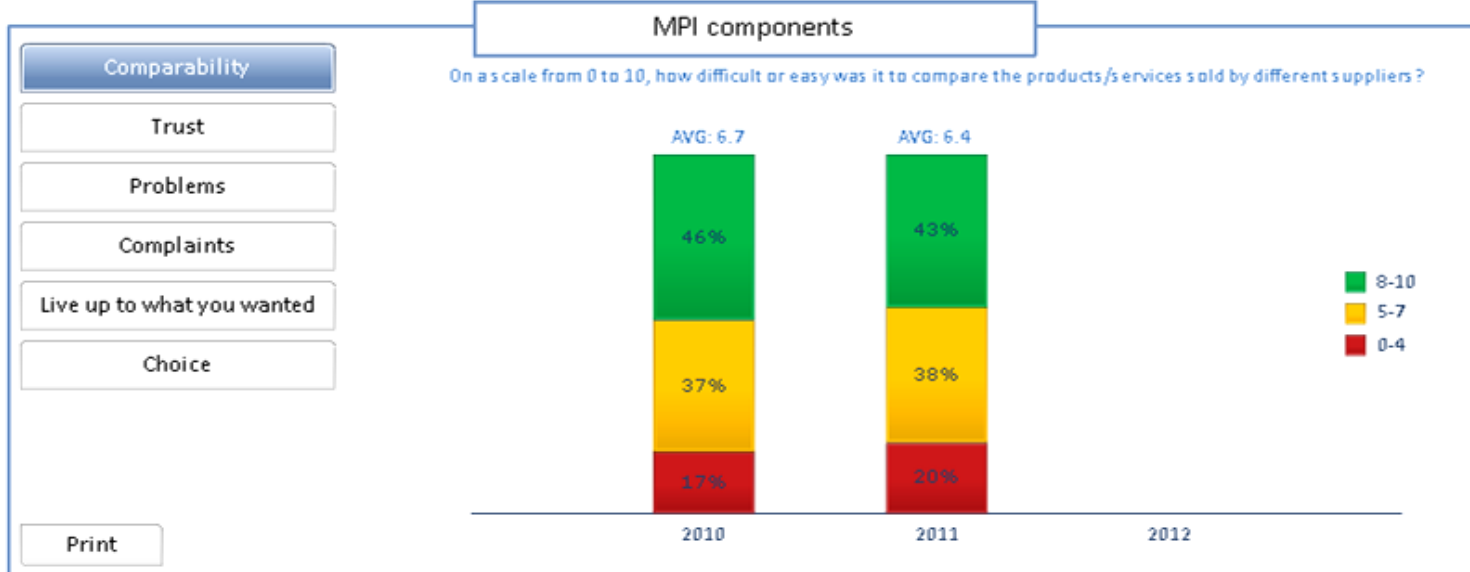
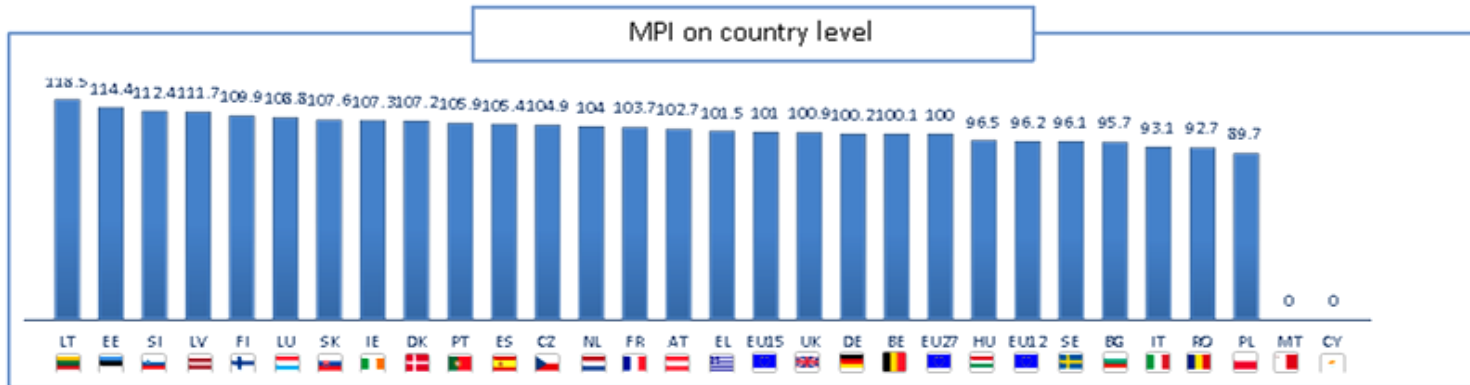


European Commission

Online dashboard

Market MPI score

Train services Normalised 2010 2011



Study: Scope, Data sources

Scope

Can consumers make optimal choices?

Reasons behind malfunctioning

Policy action?

Datasources

Consumer opinion survey

Mystery shopping + price collection

Stakeholder consultations: EU-level and national level

Desk research

Scope – opinion survey

Meat purchases and consumption
Knowledge and purchases of different types
Retailer: used and preferred + reasons
Information: sources and aspects looked for
Understanding of information
Priorities
Food waste
Consumer intentions & behaviour
Satisfaction
Perception of safety

27 Member States, 13477 respondents

Scope – mystery shopping

Availability of categories and types of meat

Price (including any sales offers)

Whether a label is included and key elements of labelling information (e.g. country of origin, display and use by date, whether organic, 'quality guaranteed', 'sustainability'.)

Whether the information was on a label, shelving or requested from a member of staff

27 Member States, 10570 observations

4 product categories checked: minced beef, pork cutlets, whole chicken and pork sausages

Results

Information and understanding

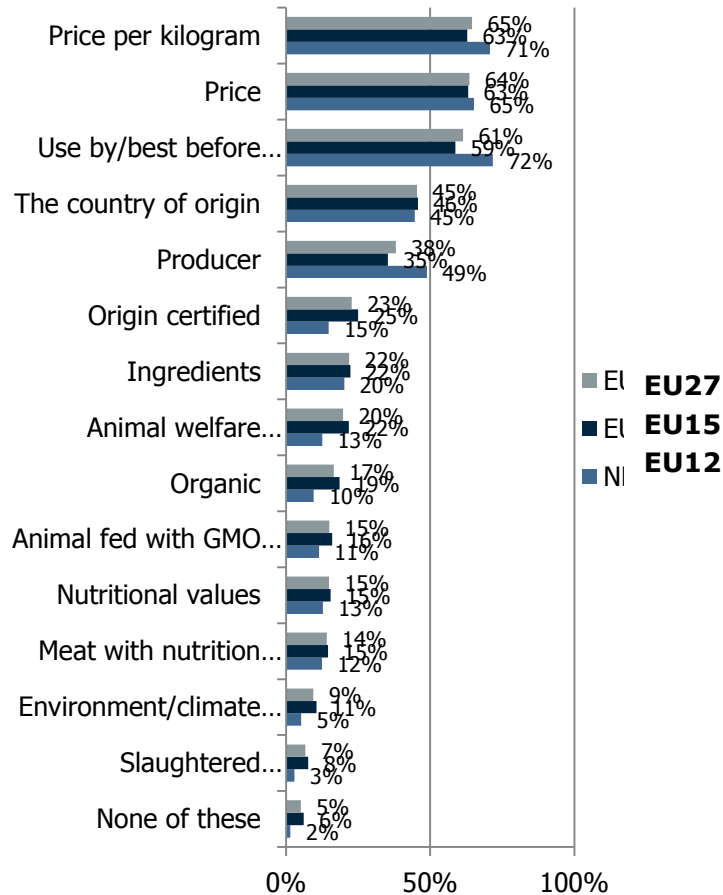
Specific meat types

General, e.g. consumer priorities, preferences, purchases, satisfaction

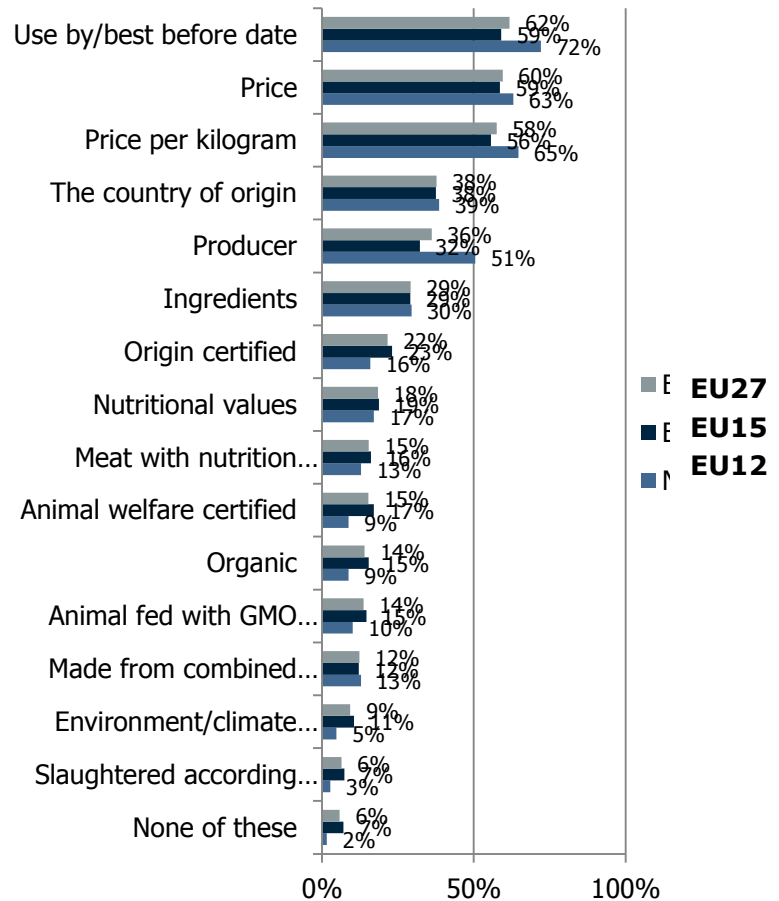
Aspects looked at when buying meat

Q12. Which of the following aspects do you look for when you buy...?

Fresh meat



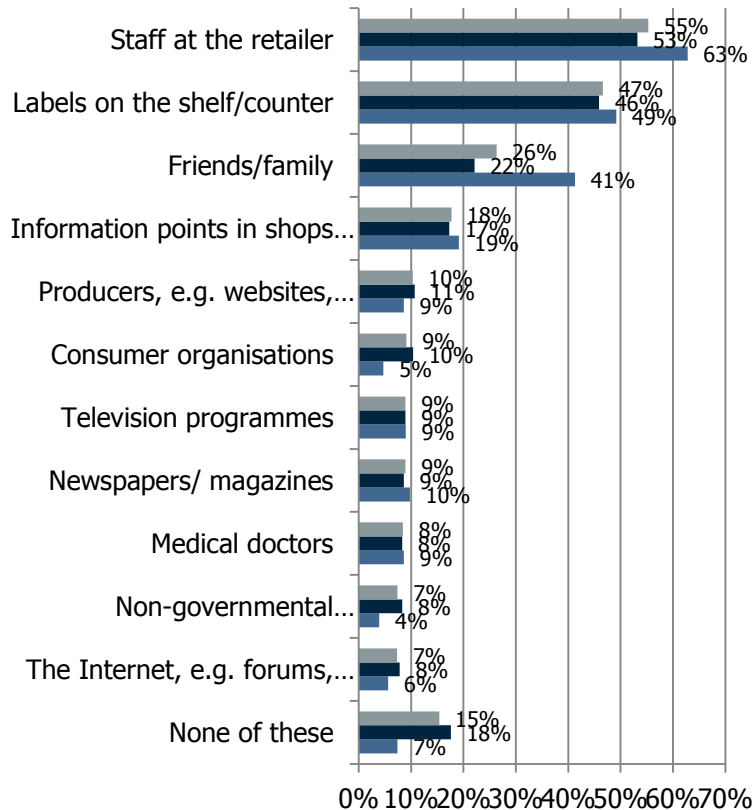
Meat products



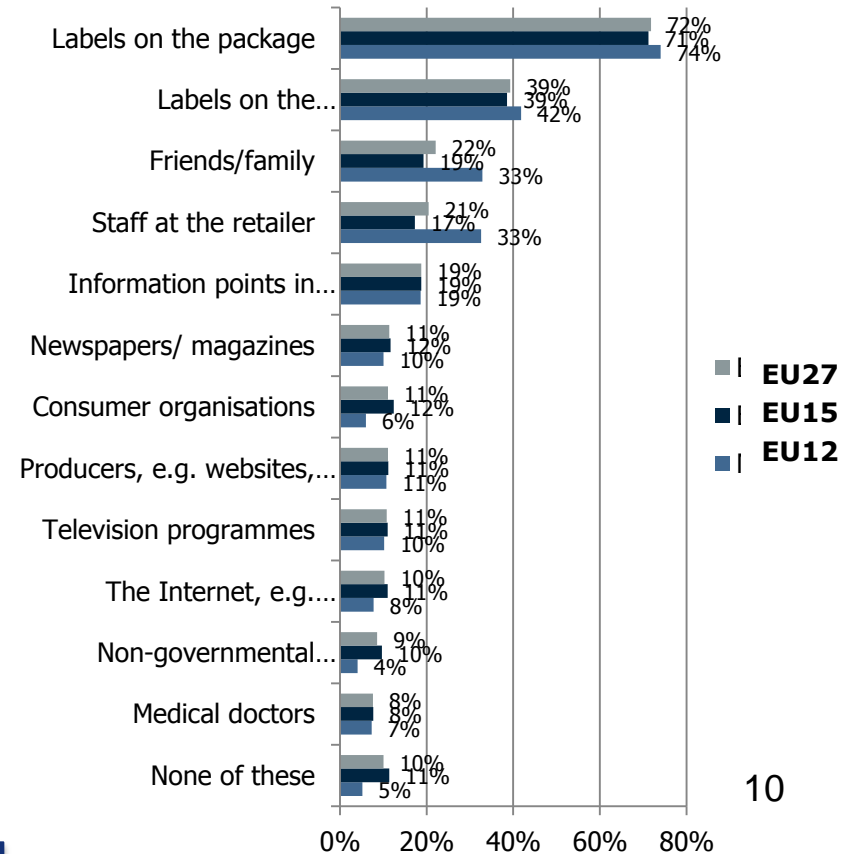
Information sources for meat purchases

Q11. What sources of information do you use for your meat purchases?

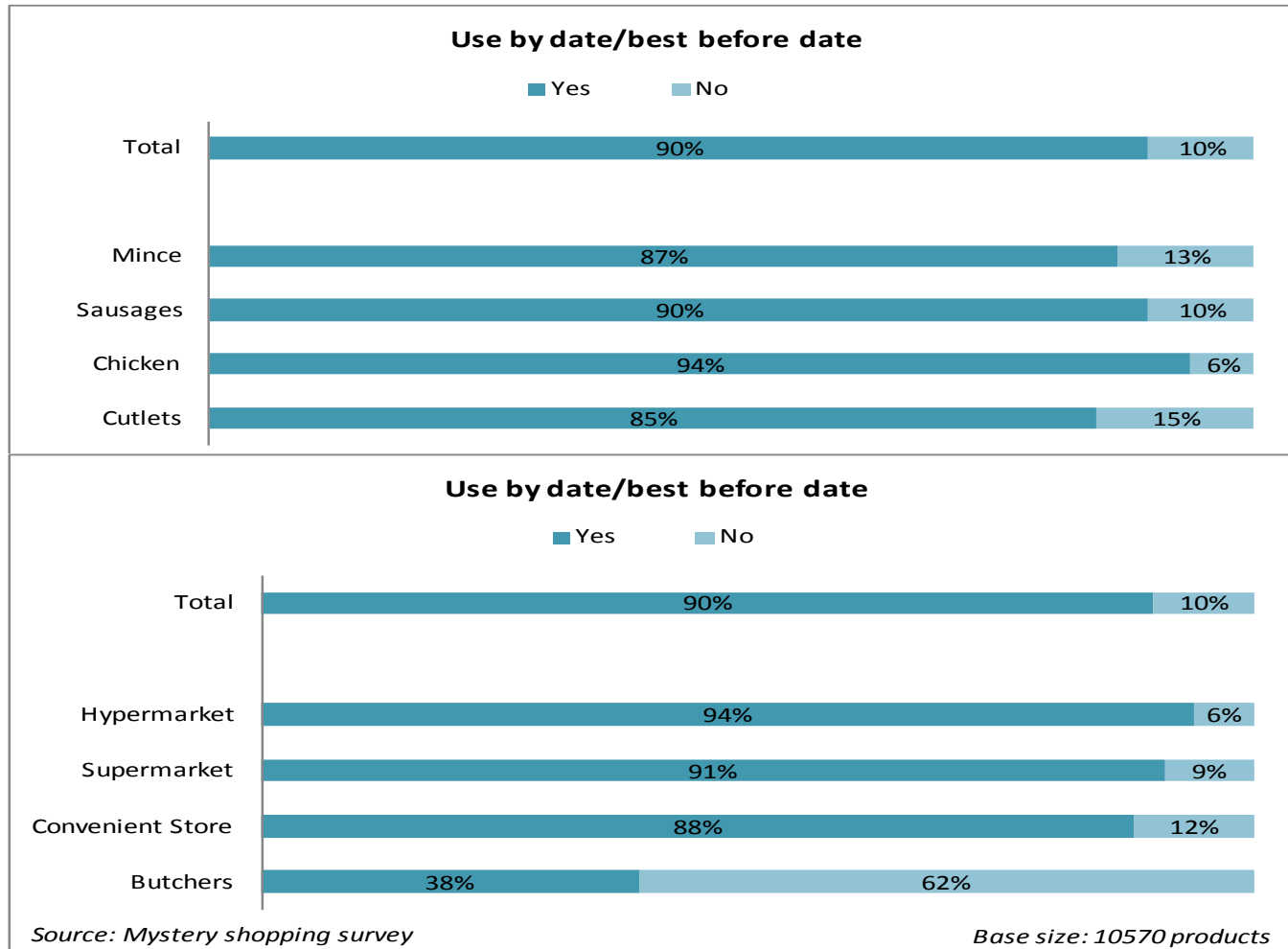
Non-packaged



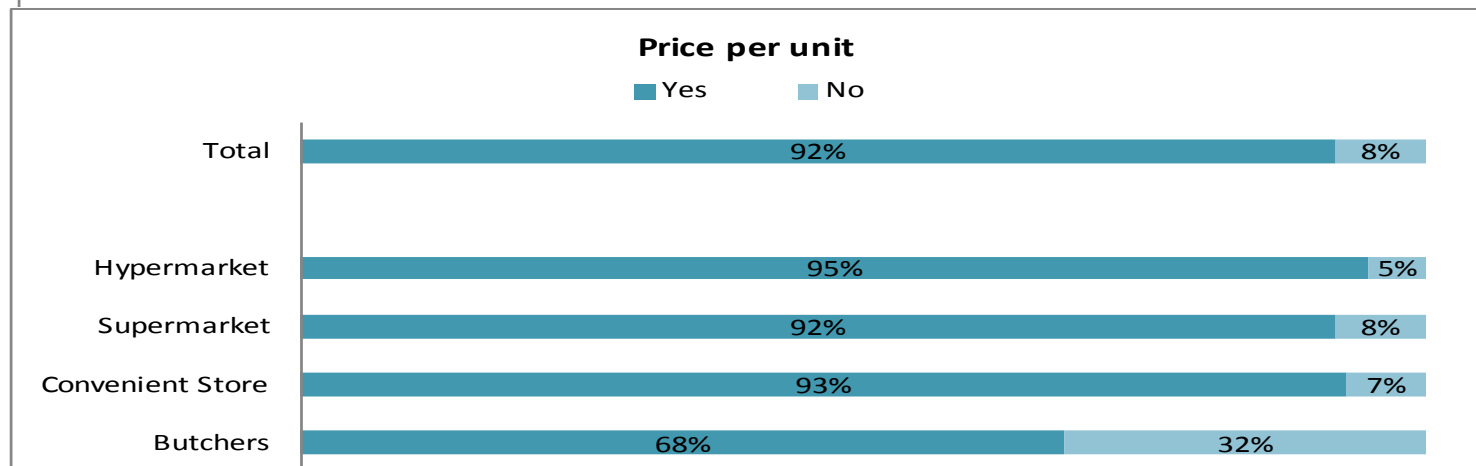
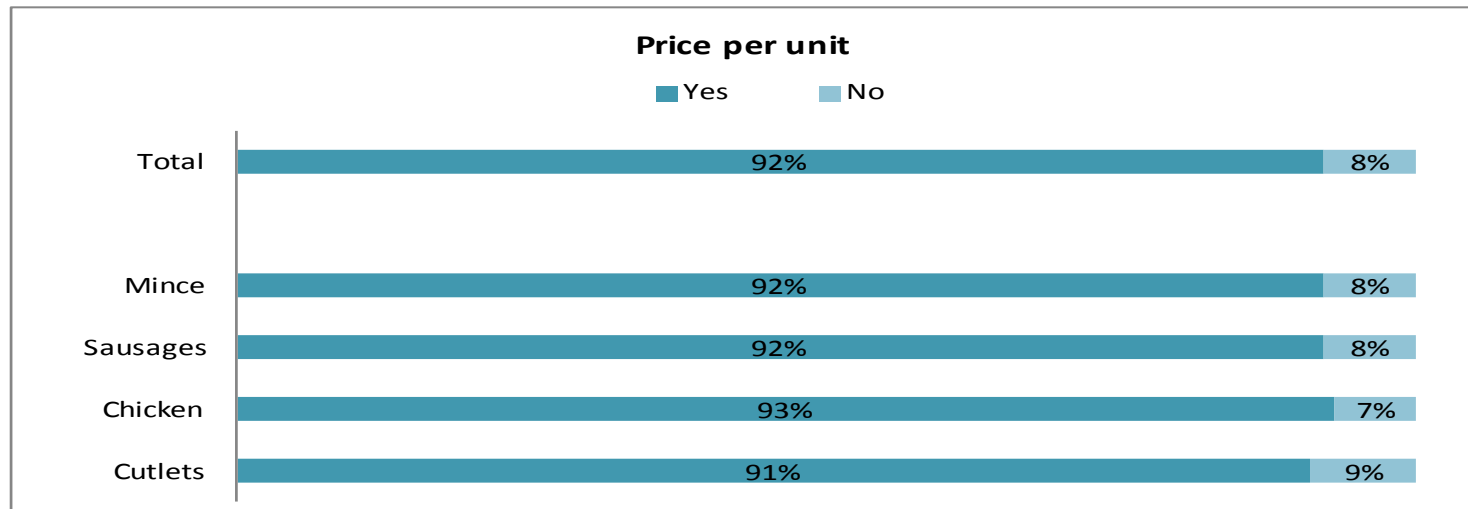
Pre-packaged



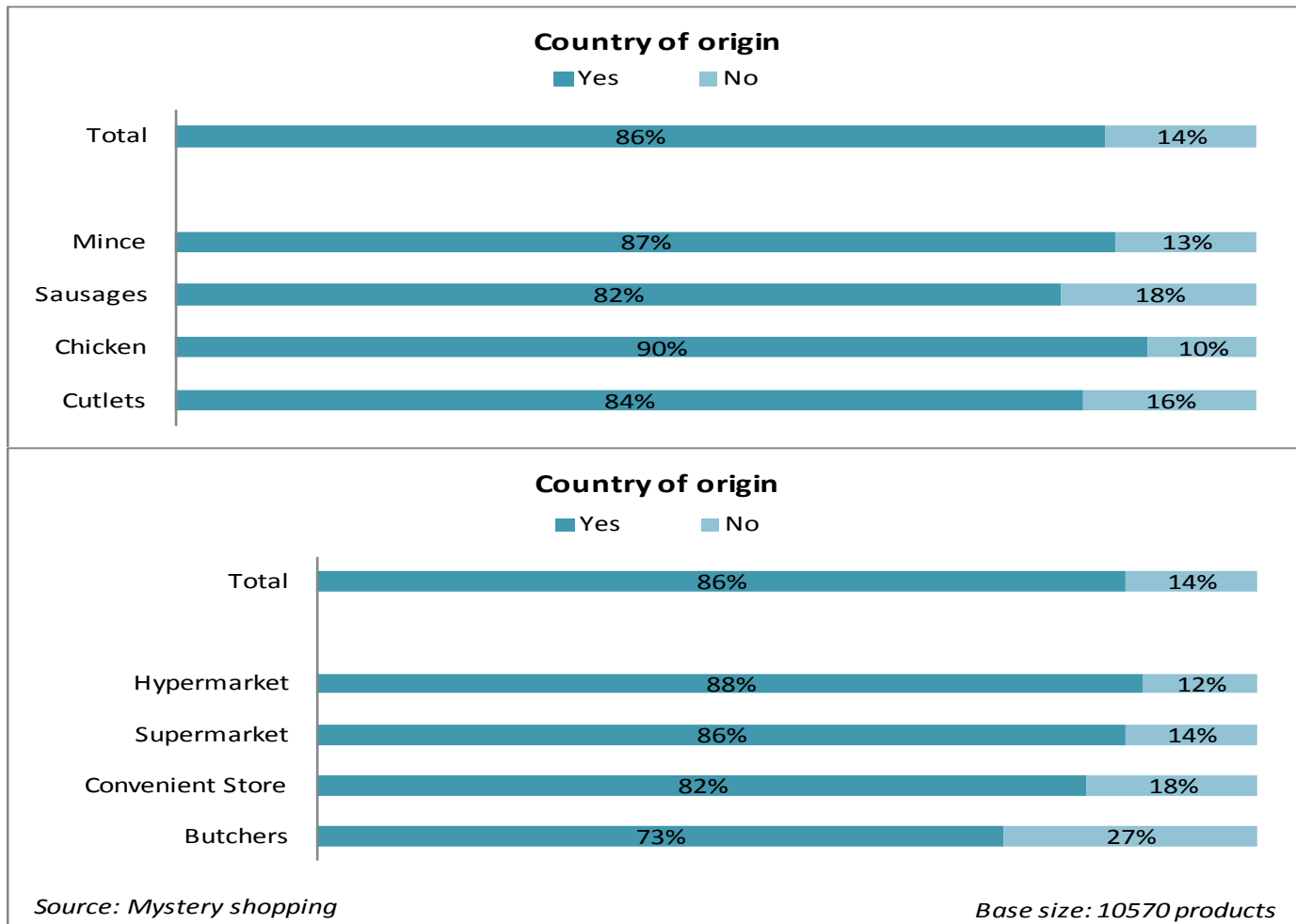
Share of products checked on which the information was available – date label



Share of products checked on which the information was available – unit price

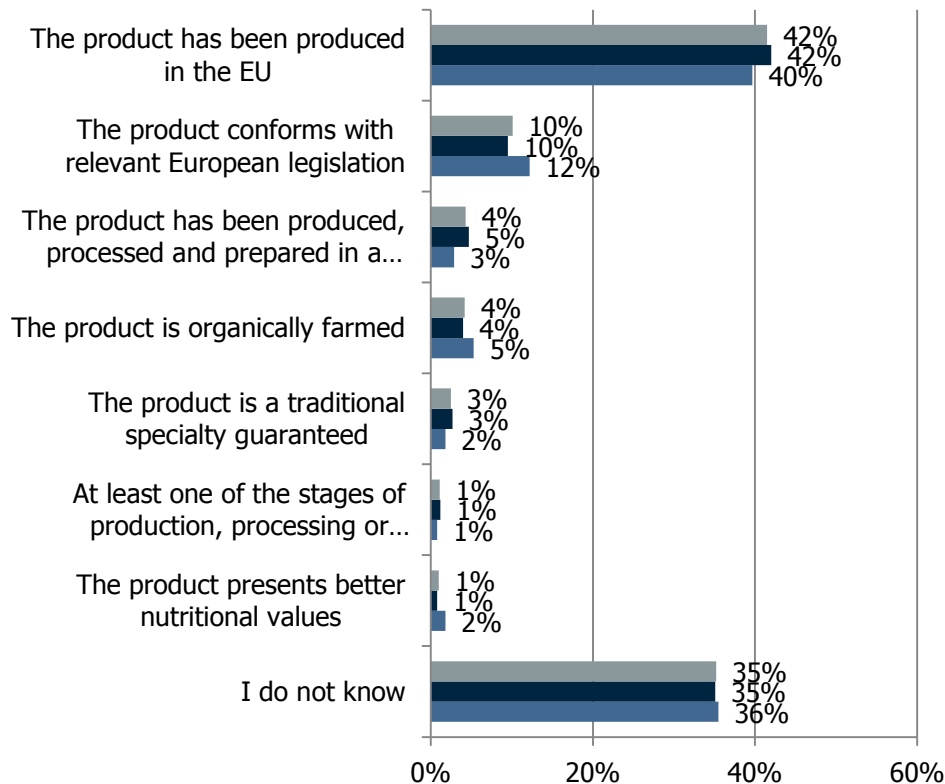


Share of products checked on which the information was available – country of origin



Consumer understanding – PDO logo

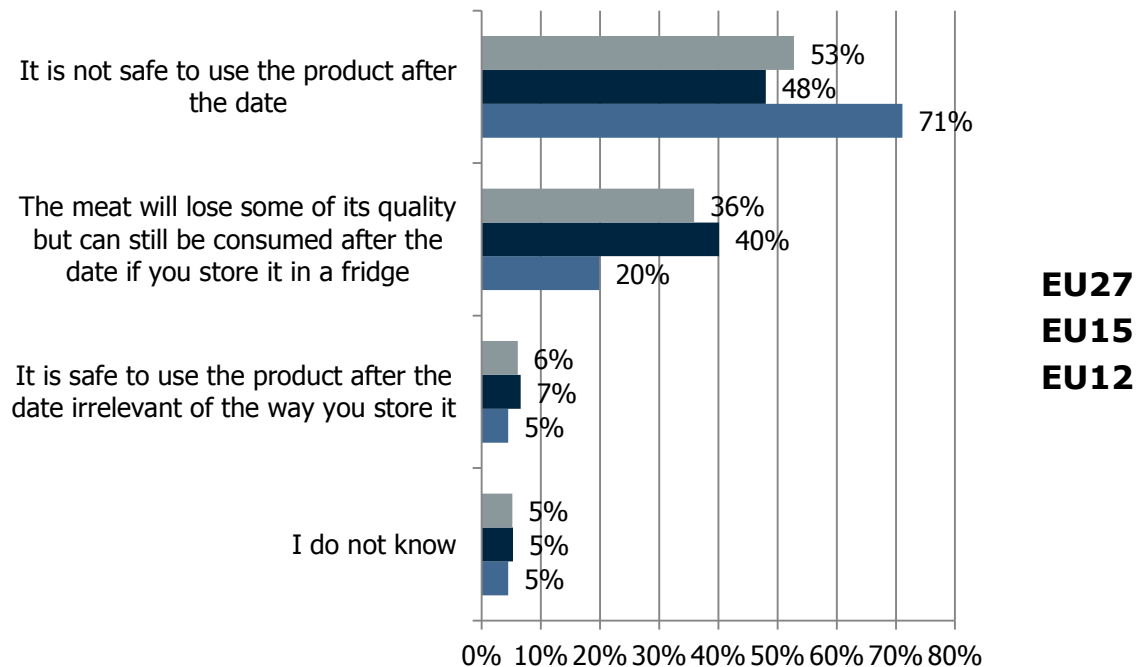
Q16. Could you indicate which of the statements you think corresponds to the meaning of this logo?



EU27
EU15
EU12

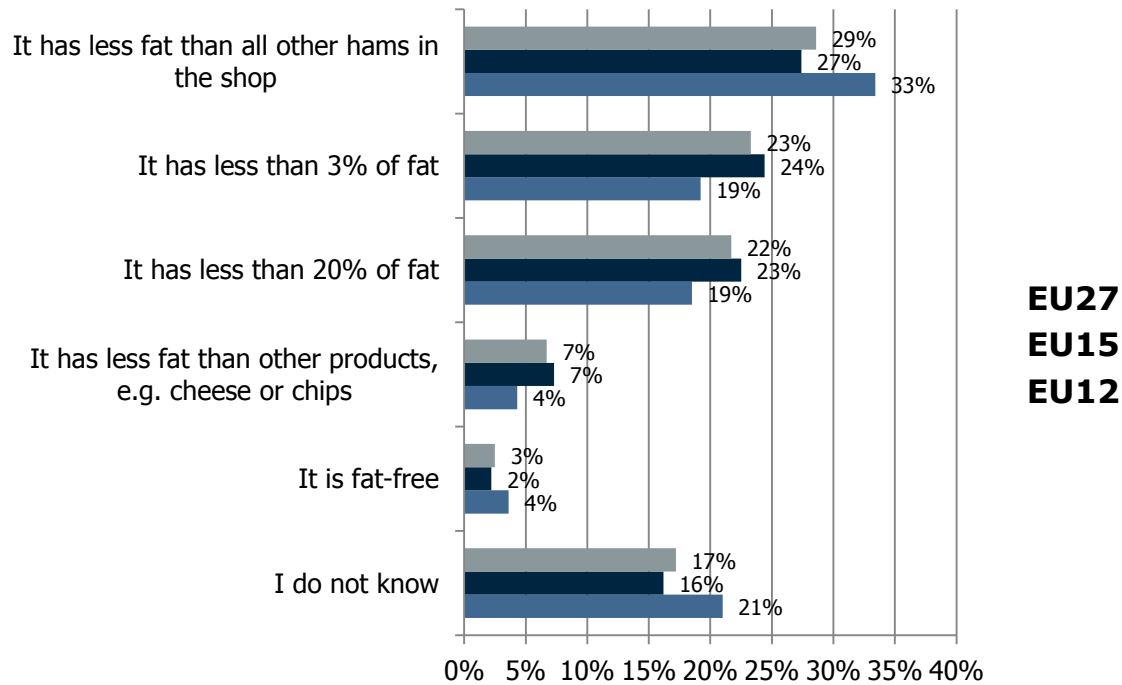
Consumer understanding – date label

Q17. A sealed pack of dry sausage that you have purchased has a best before date on its label. What does it mean?

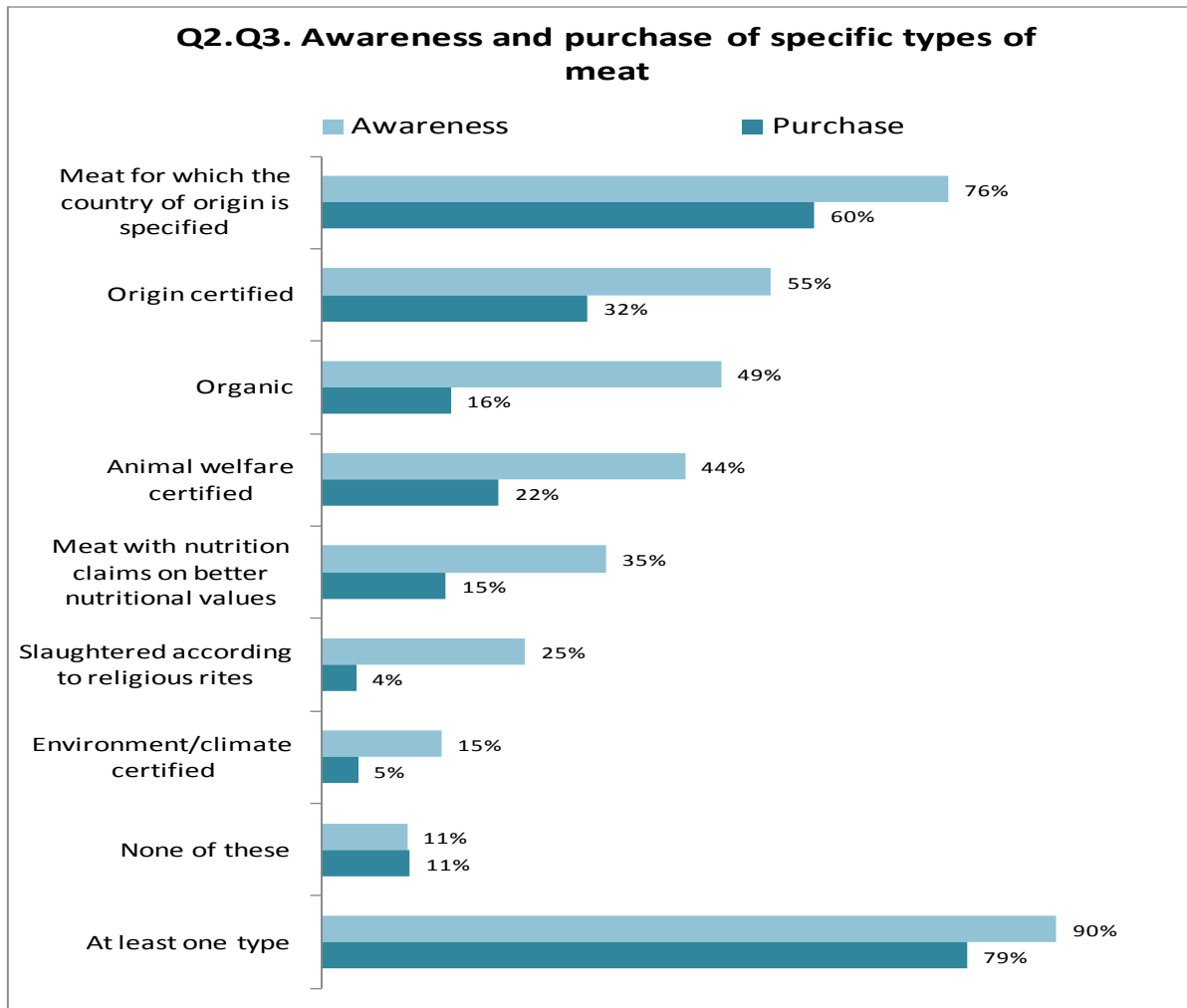


Consumer understanding – health claim

Q18. The pack of ham that you have bought has a label "low fat" on it. What does it mean?

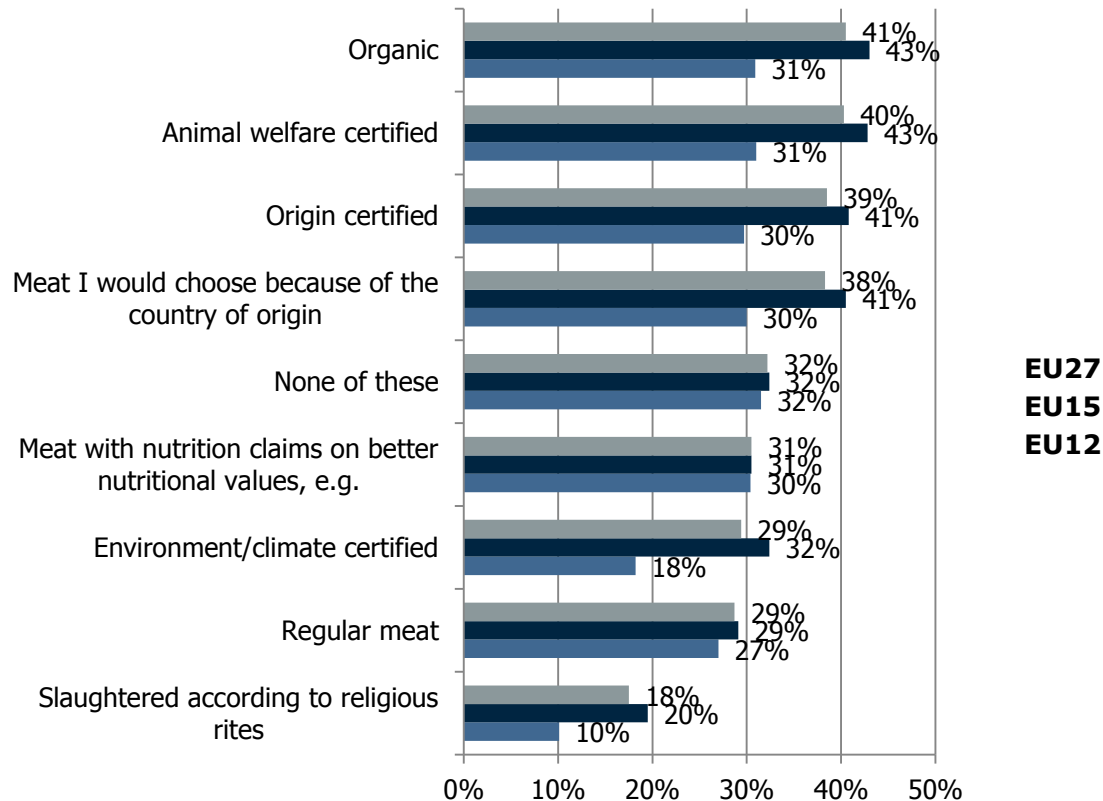


Awareness and purchase of specific meat types



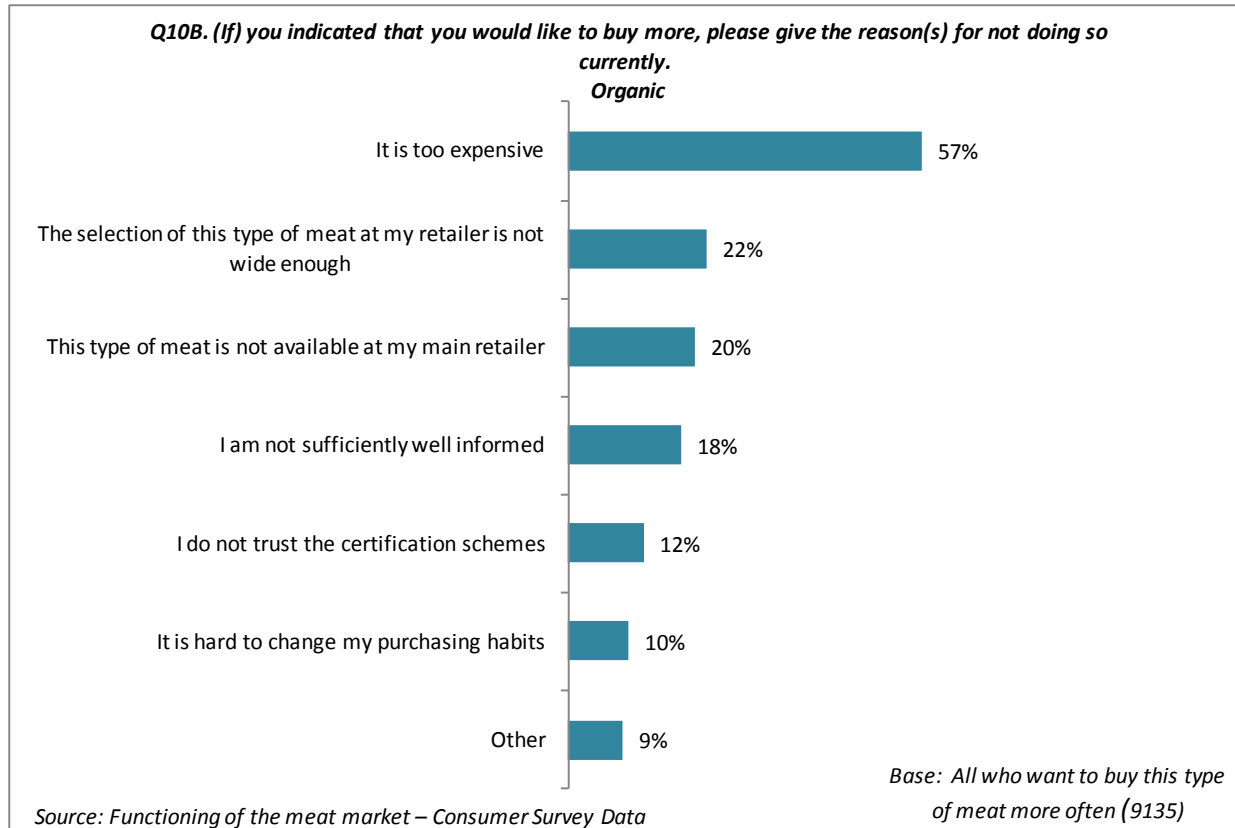
Intentions to buy specific meat types more often

Q10A. Would you like to buy more often the following types of meat or meat products?



Reasons for not buying specific meat types more often

ORGANIC



Consumer prices of meat (prices collected by mystery shoppers)

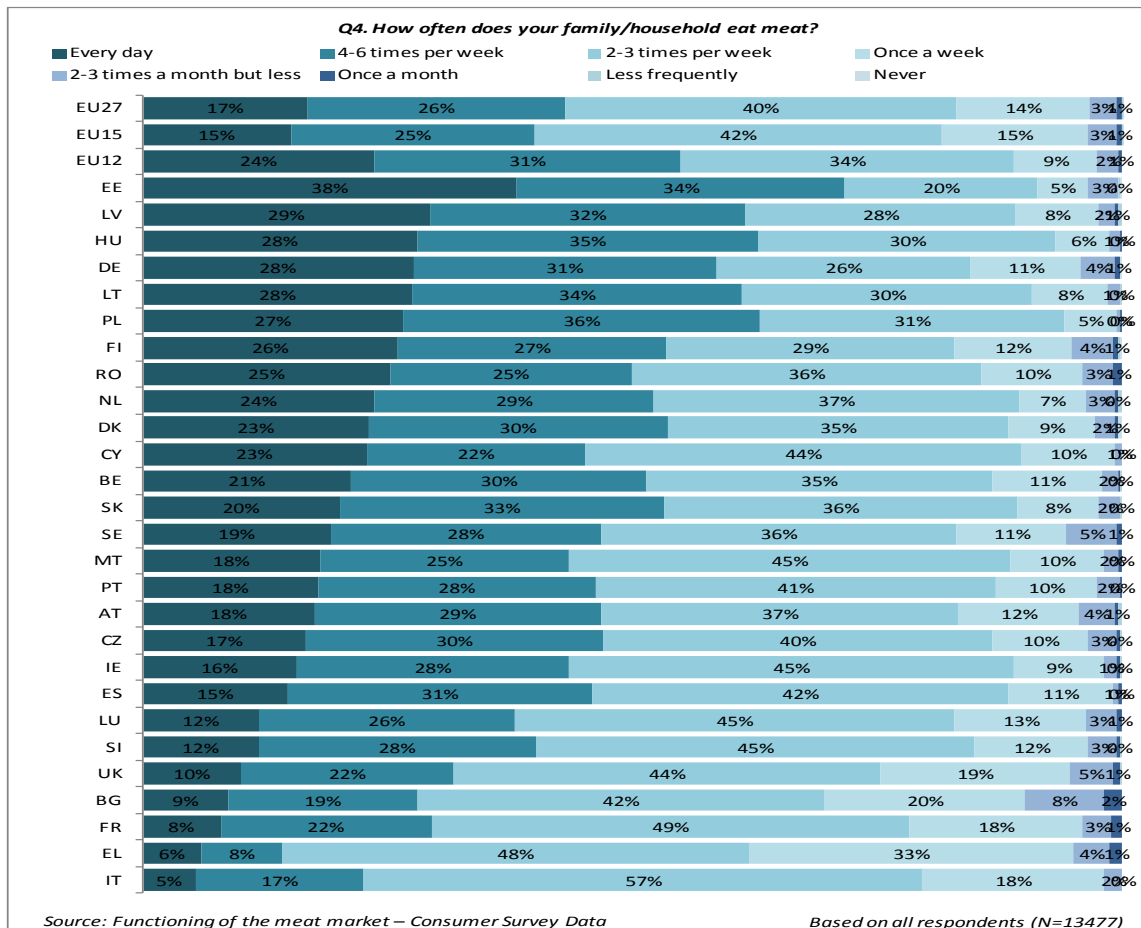
At the level of EU27

organic meat is **66%** more expensive than regular meat

Origin certified meat is almost **20%** more expensive than regular meat

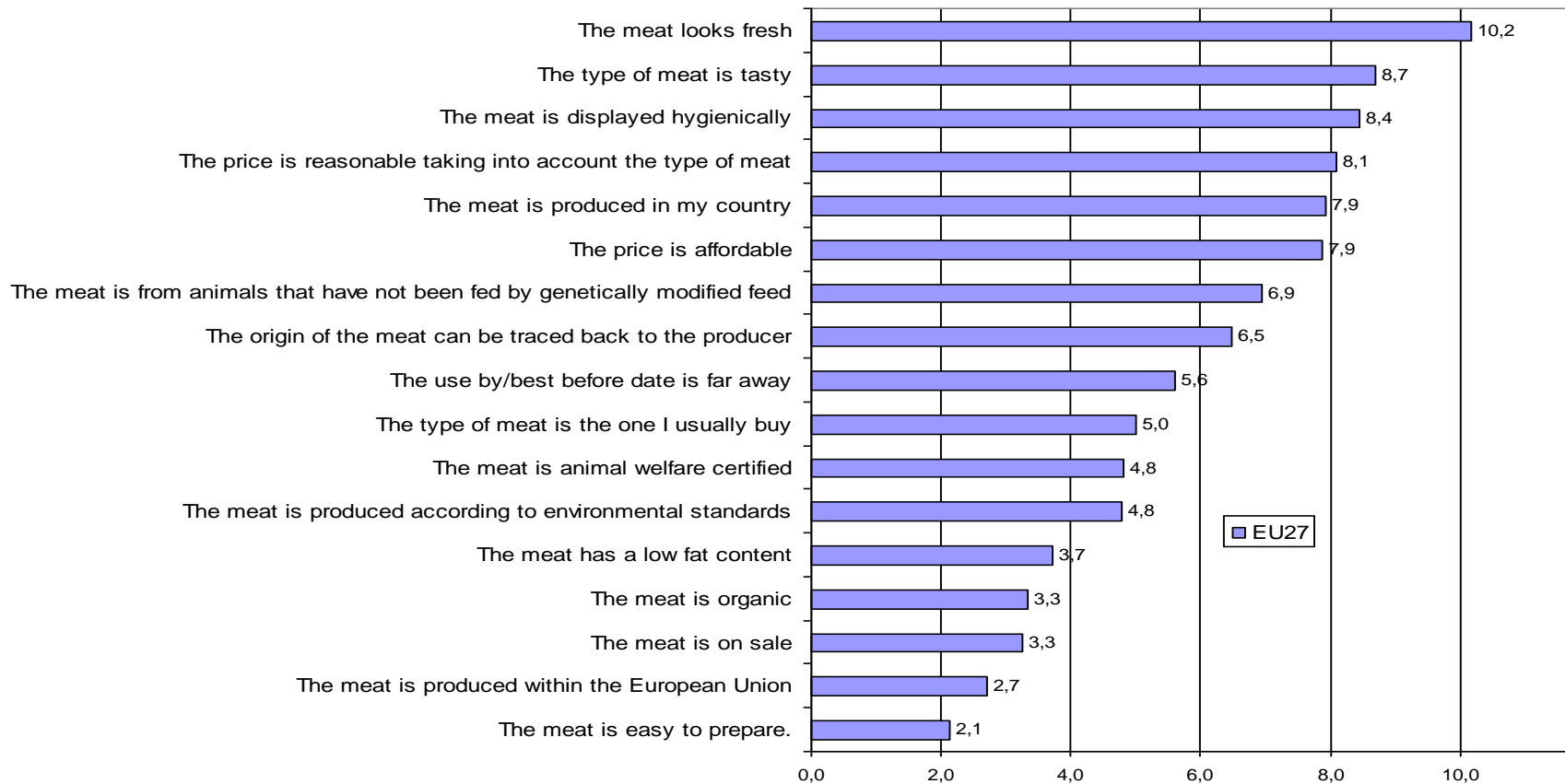
Animal welfare certified meat is almost **20%** more expensive than regular meat

Meat consumption



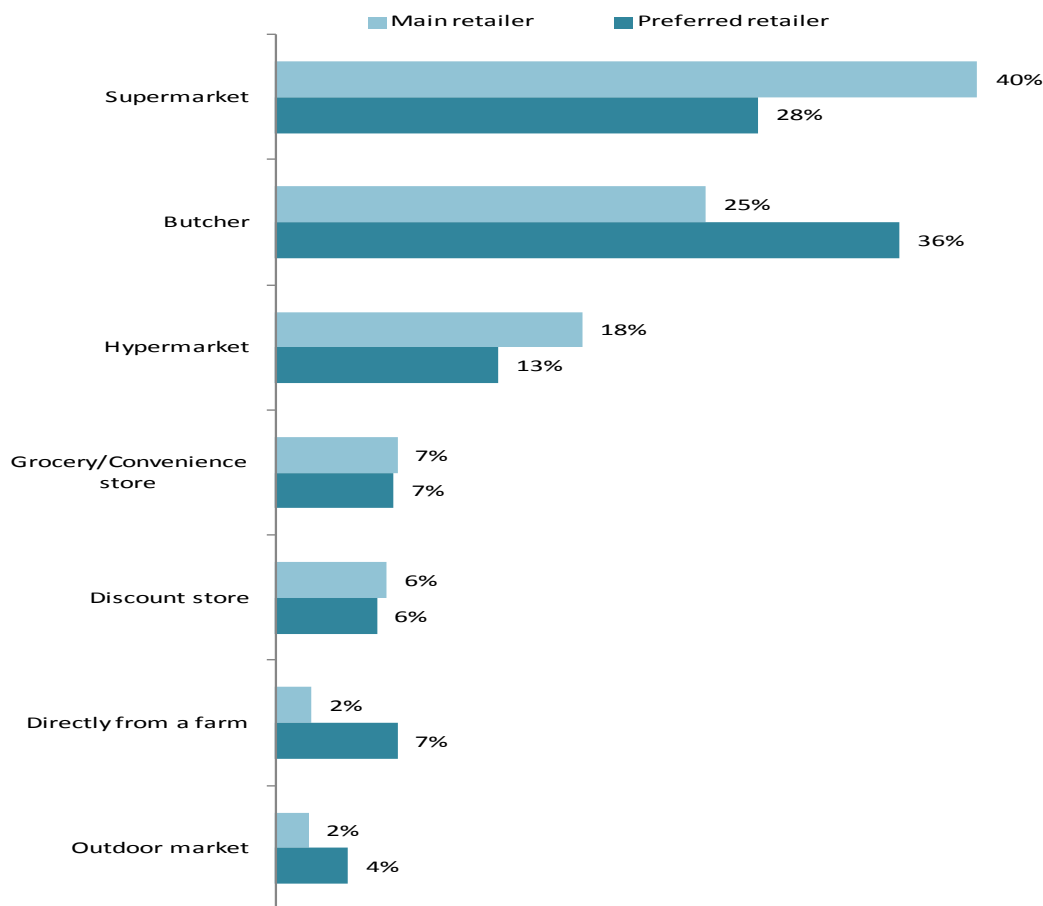
Consumer priorities

Factors consumers take into account while buying meat (% share of each factor within 100%)



Use of retailers

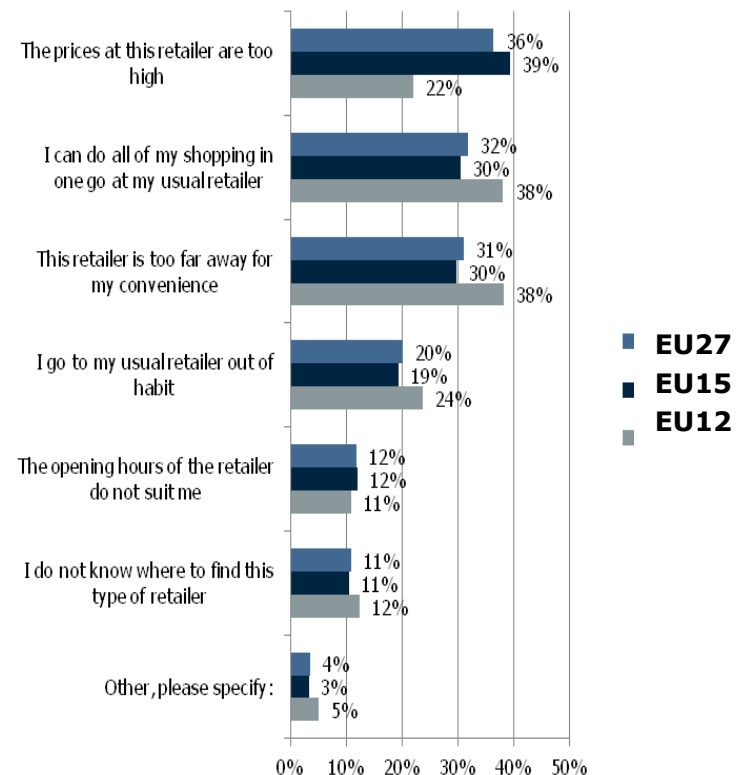
Q5A. Which is the MAIN RETAILER you use to buy meat or meat products?
Q5C. And which is your PREFERRED RETAILER regardless of where you currently buy meat?



Source: Functioning of the meat market – Consumer Survey Data

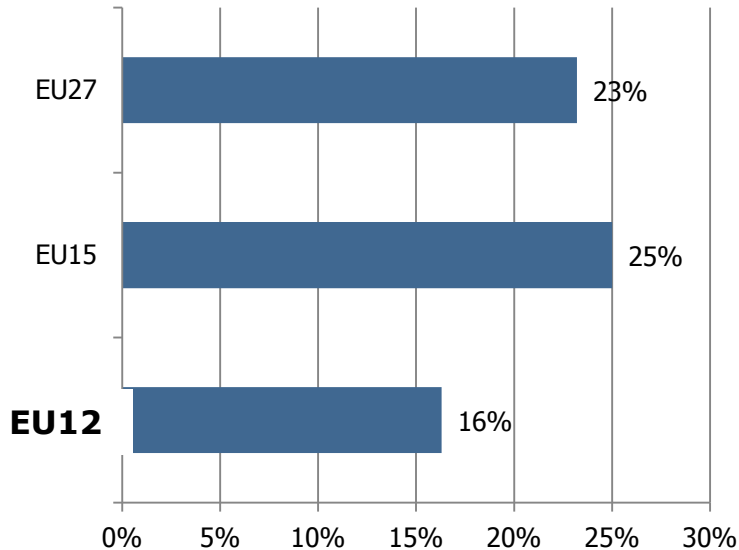
Based on all respondents (N=13477)

Q6a. Why are you not currently buying at this retailer?



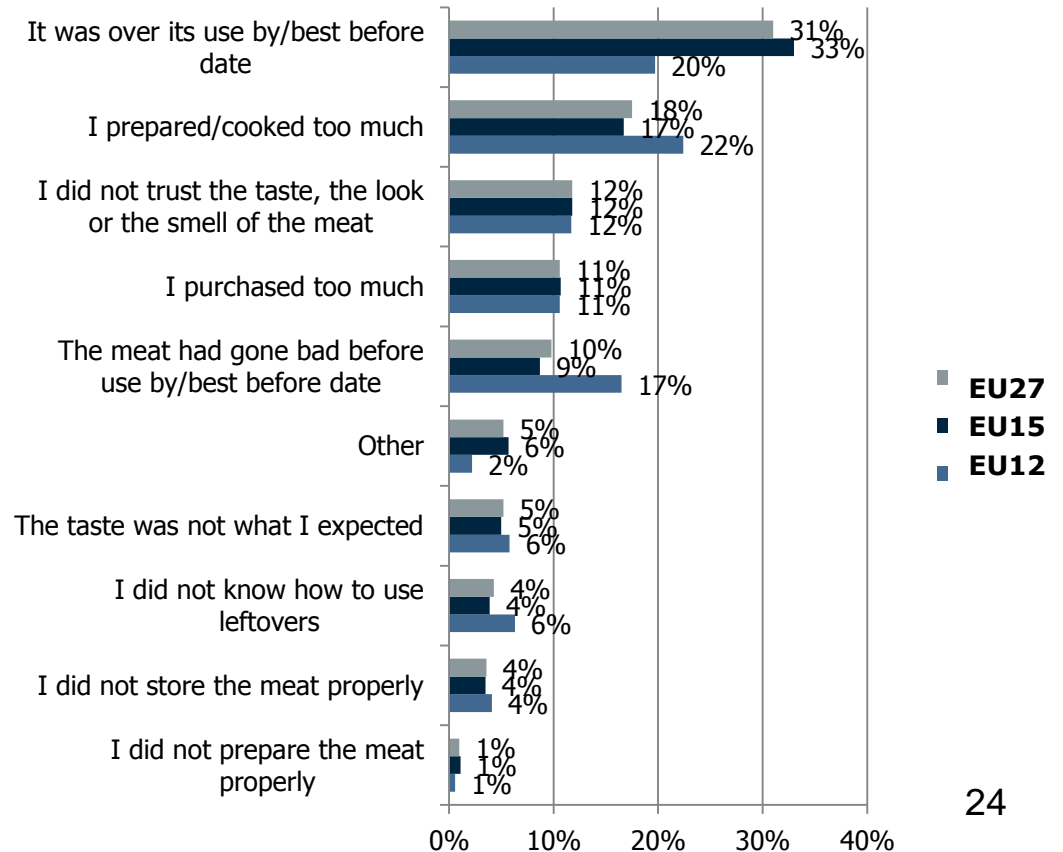
Food waste

All who threw away meat in the past month



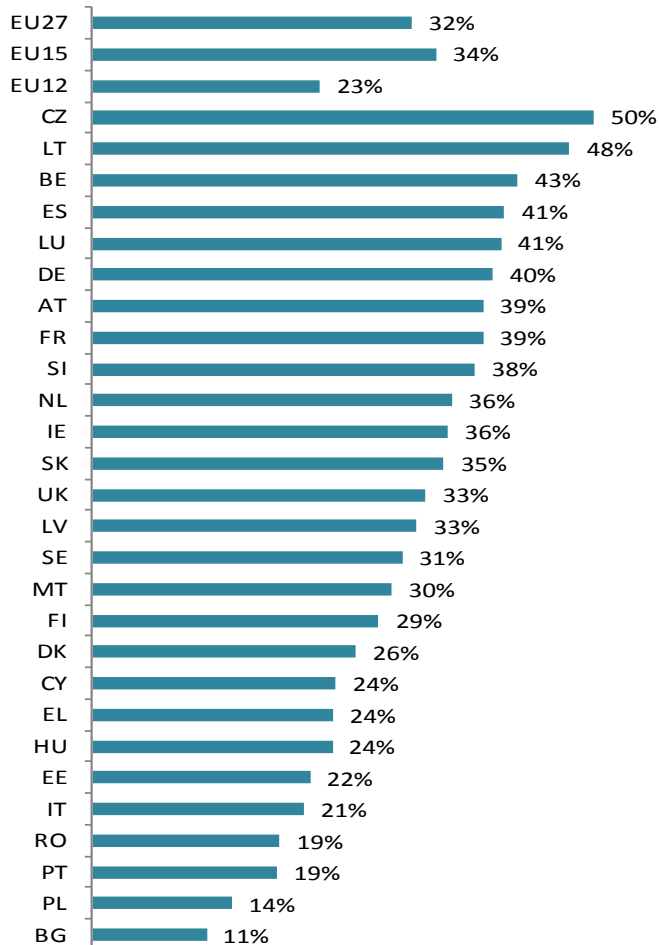
What was the MOST FREQUENT reason for you to throw away meat or meat products?

BASE: Those who threw away meat in the past month

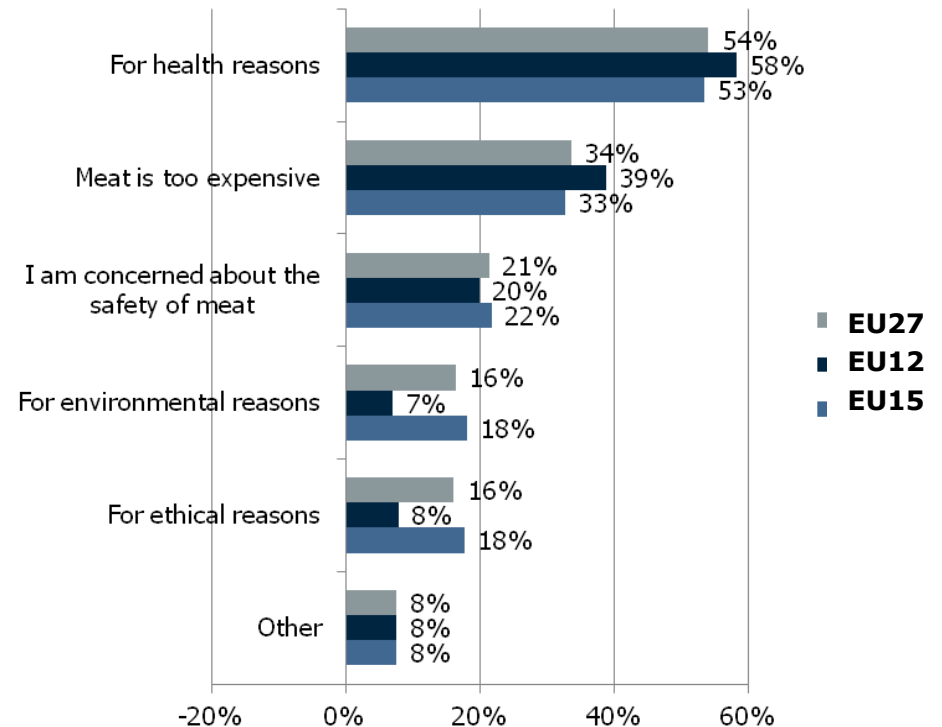


Consumer intention to buy meat less often

Q10C. And in general would you like to buy meat or meat products less often?



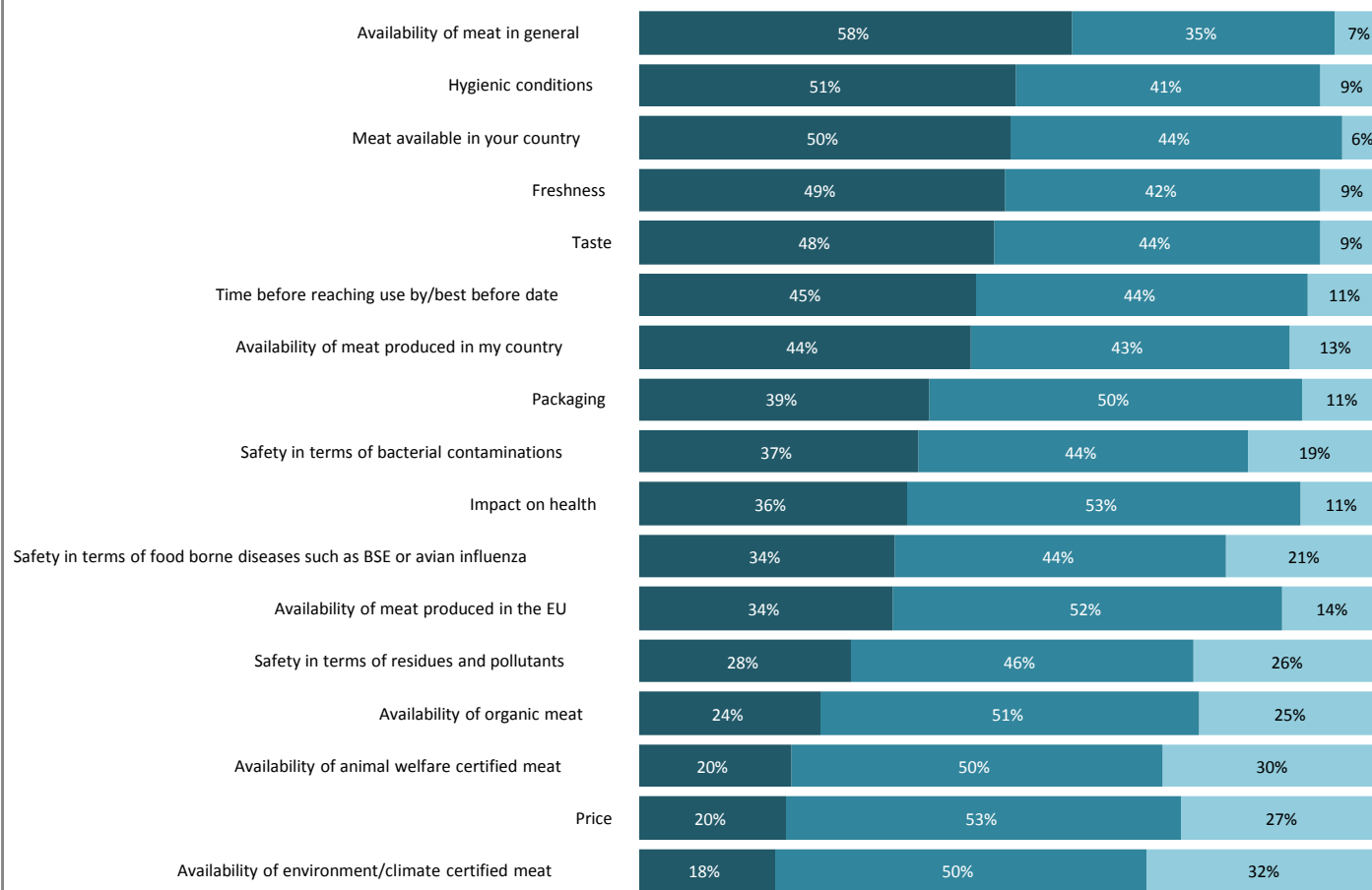
Q10D. (If) you indicated that you would like to buy meat less often, please give the reason(s) why you would like to reduce your meat consumption



Satisfaction with specific aspects of the meat market

Q13. When you think of the meat that is available in your country, how satisfied are you with the following aspects?

■ (0-4) Bottom ■ (5-7) Middle ■ (8-10) Top



Stakeholders' views

Several aspects are seen as malfunctioning or needing improvement: public image, consumer trust, consumer information and knowledge, transparency, price transparency in the chain, investments in innovation, sustainability, maintaining competition

Any measures to be taken should involve all meat market actors: national governments and authorities, the industry itself, consumer organisations, retailers, the education system, and scientists and researchers

Conclusions

Consumers have a limited level of understanding and knowledge of the market in terms of types of meat, information, labelling.

Consumers focus on a very limited number of information sources and aspects when buying meat. Information is less available in butchers.

Health aspect is important for consumers (main reason for a possible reduction of consumption) but their use of nutrition information is not high.

Country of origin is important for consumers

Organic meat costs 66% more than regular, origin or animal welfare certified 20% more than regular - obstacle to change purchasing behaviour.

The actual main retailer is often not the preferred one.

Almost a quarter of consumers throw away edible meat parts, mostly due to suboptimal planning of purchases or meals.

Next steps

Study will be published in the autumn 2012

Commission follow-up actions

Thank you for your attention

For more info

http://ec.europa.eu/consumers/strategy/facts_en.htm

For questions, contact

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