



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

**Paulina Gbur & Margareta Theelen  
Unit B1, Consumer Markets  
DG Health and Consumers, European Commission  
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# Background

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

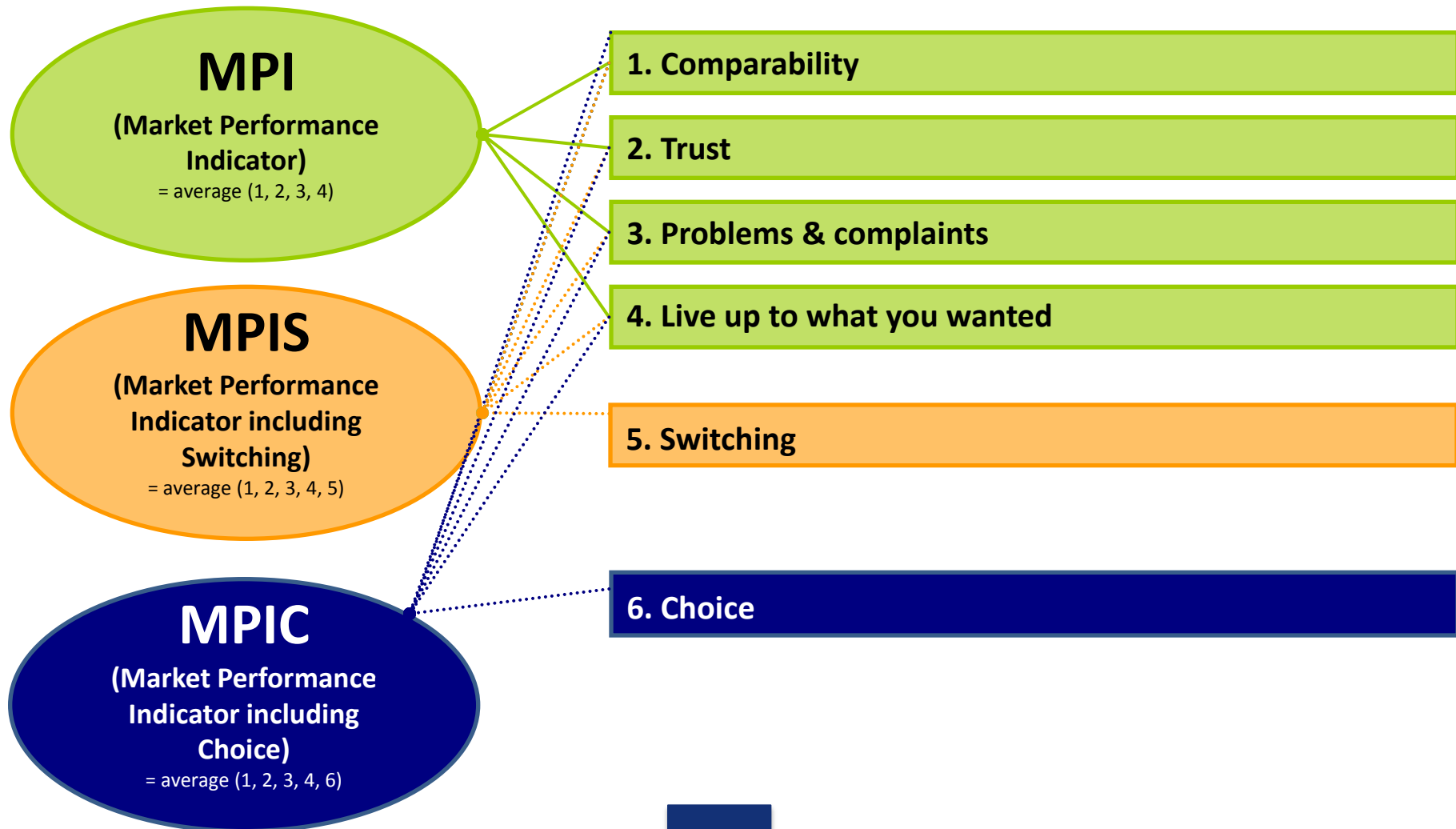
Weaker performance of the meat market in the Consumer Markets  
Scoreboard

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



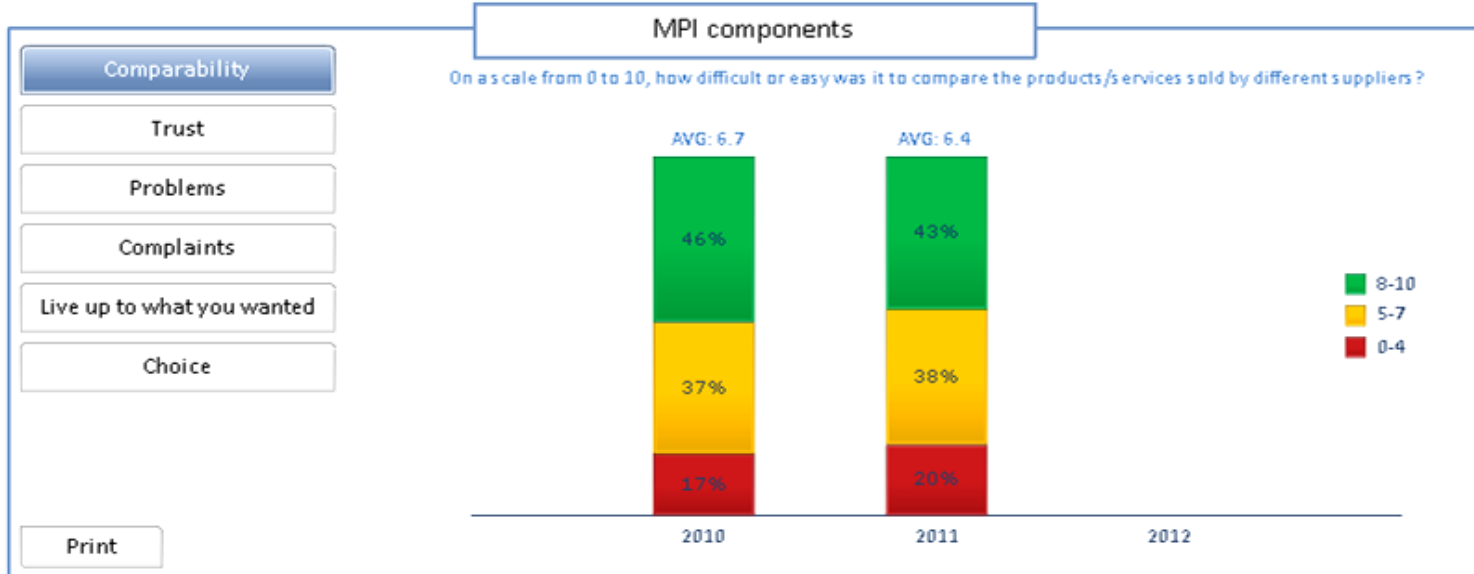
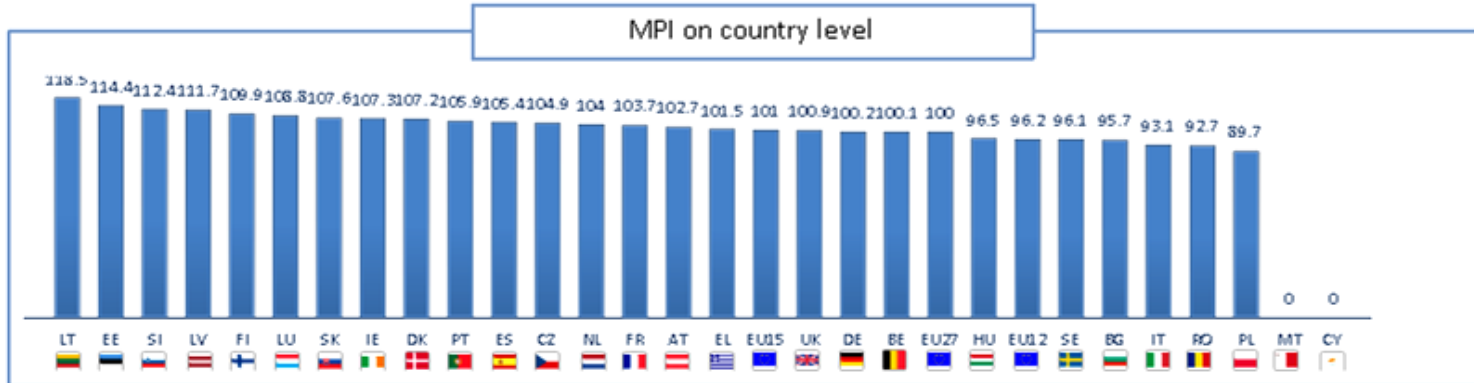


European Commission

# 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**

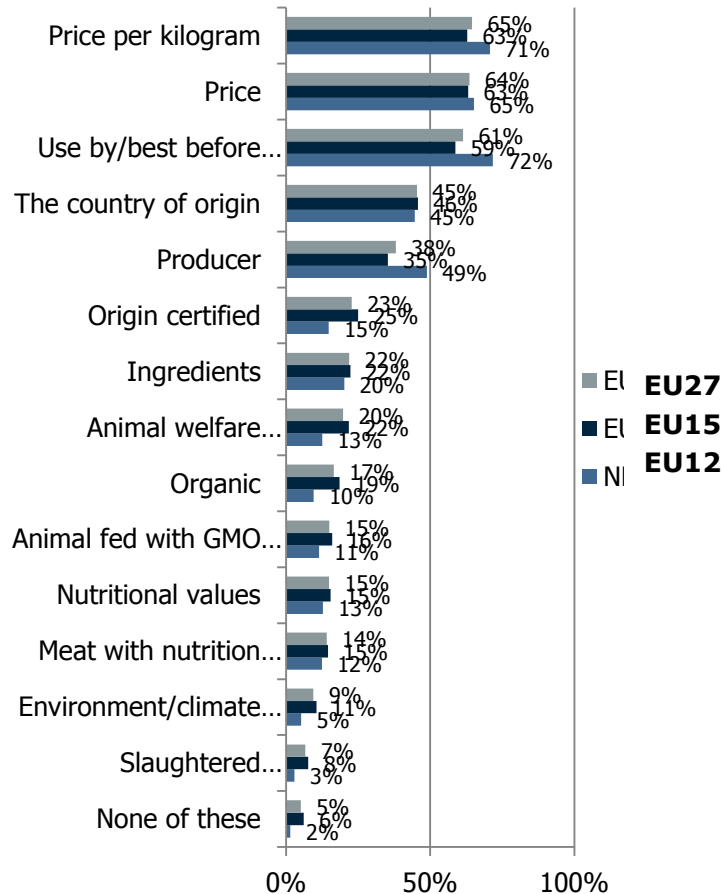
**General, e.g. consumer priorities, preferences, purchases, satisfaction**



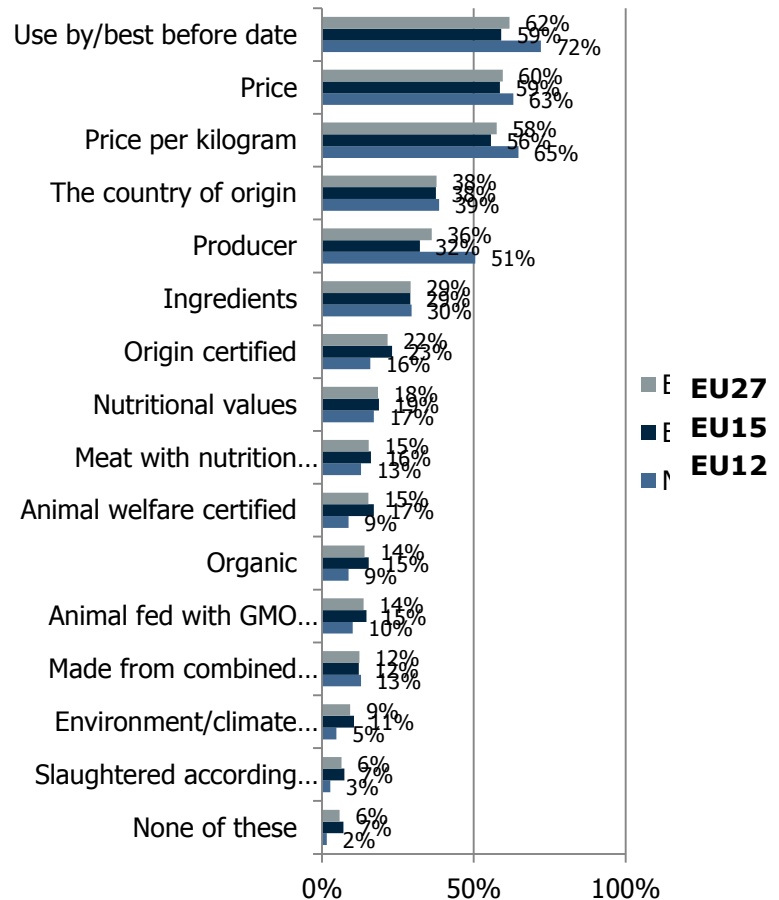
# Aspects looked at when buying meat

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

Fresh meat



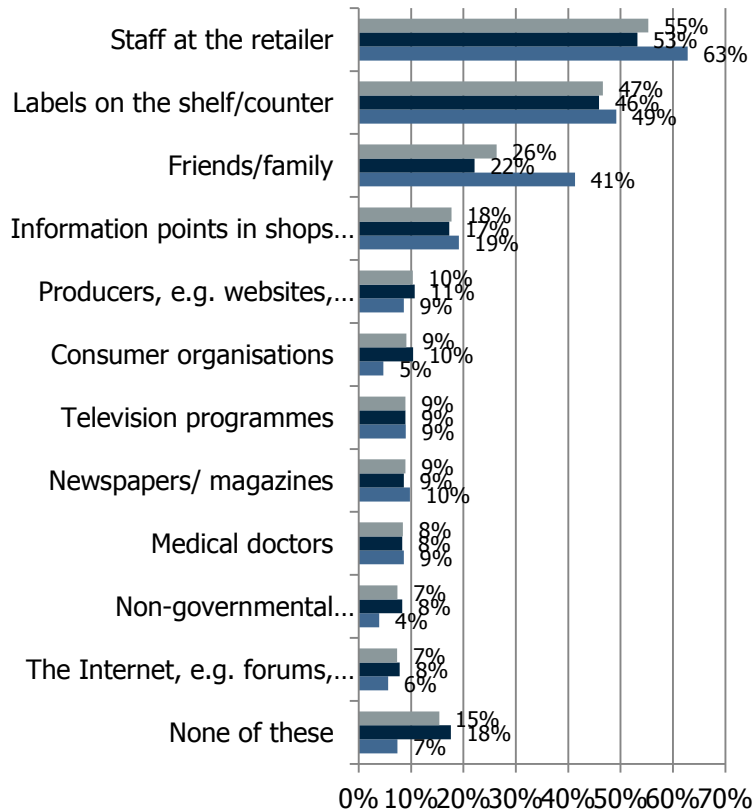
Meat products



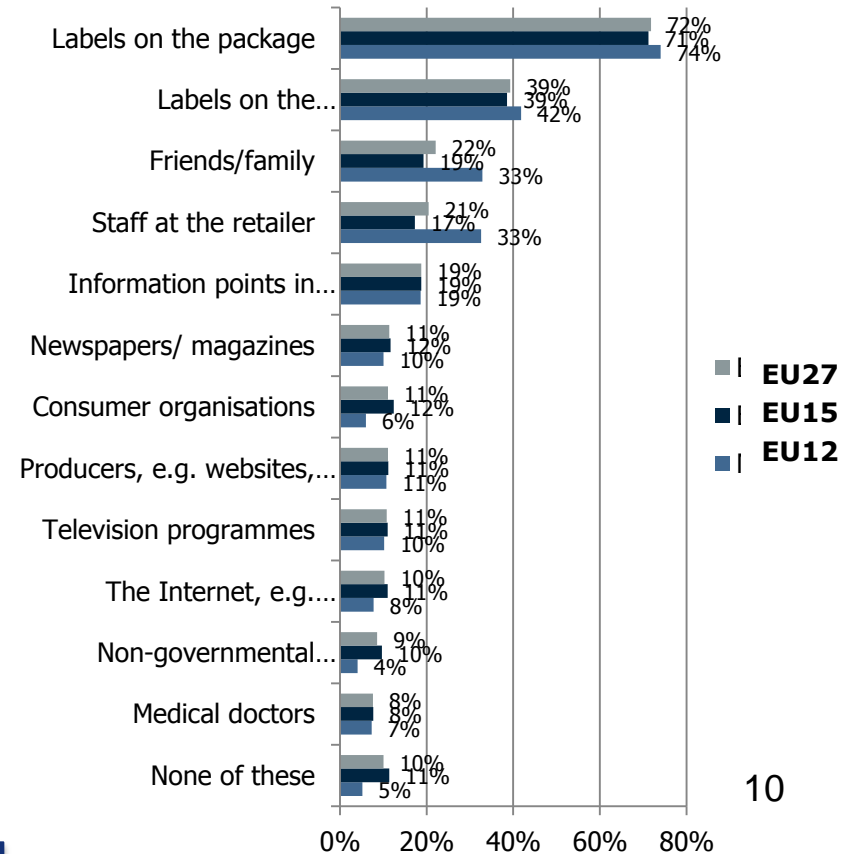
# Information sources for meat purchases

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

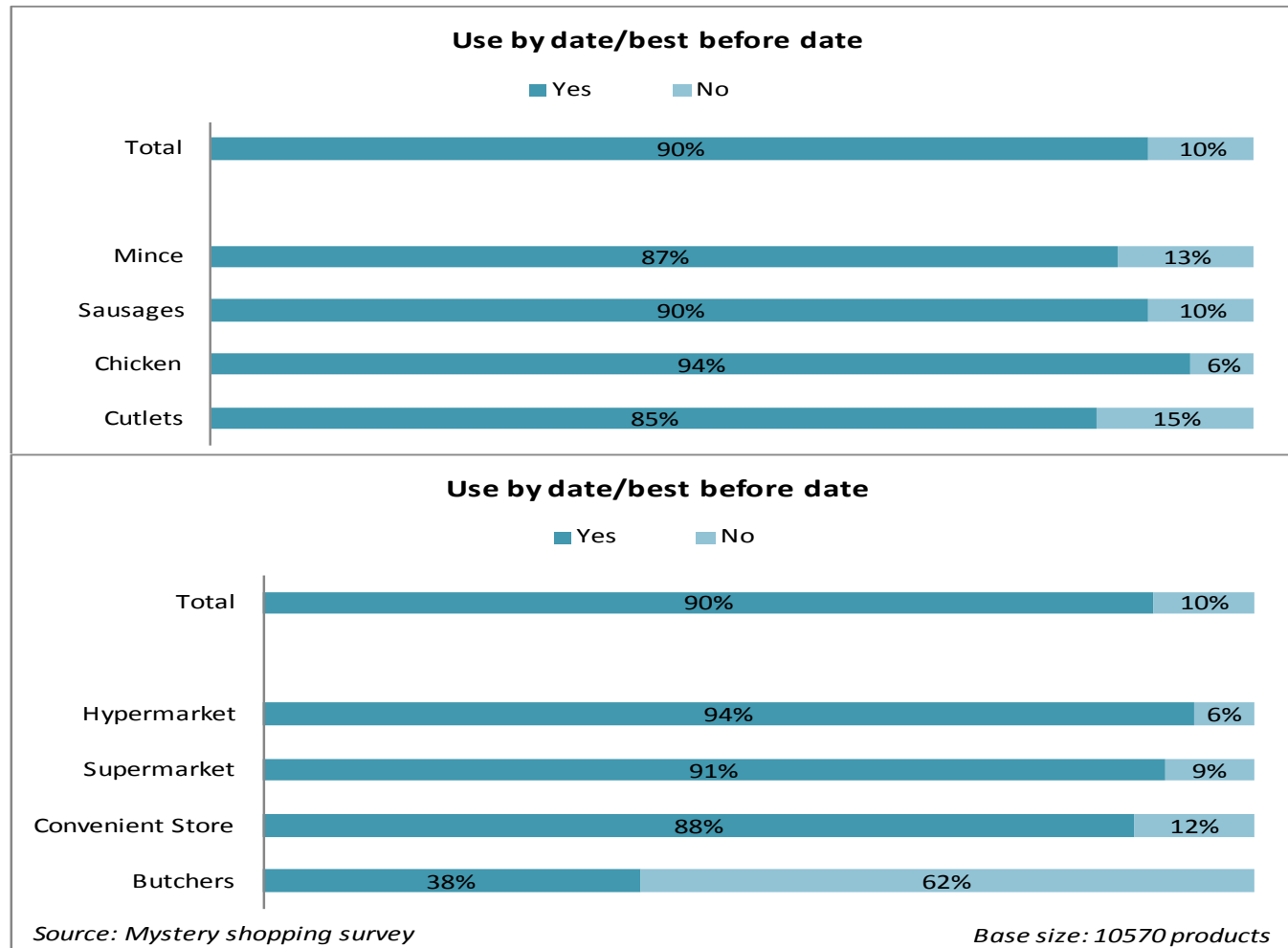
Non-packaged



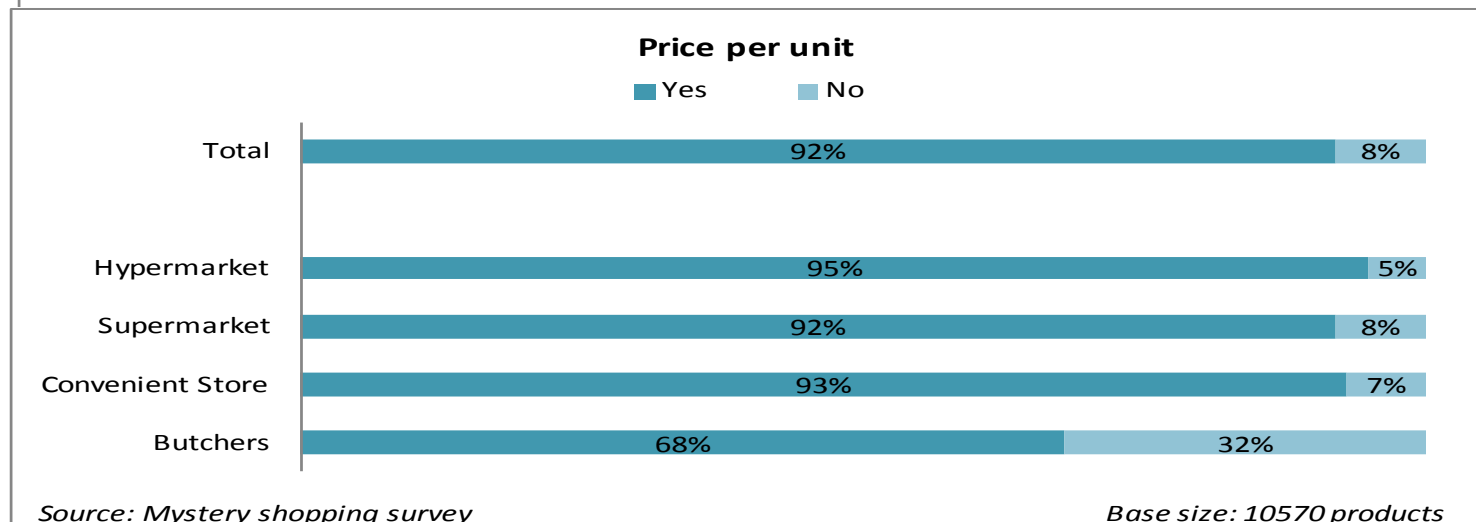
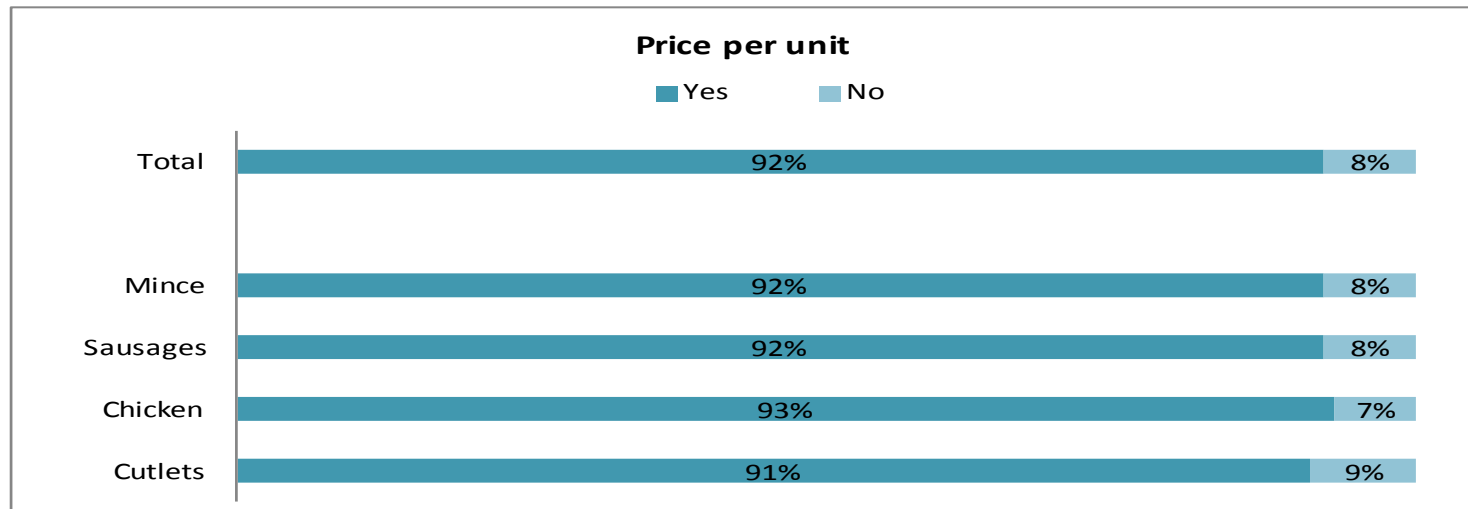
Pre-packaged



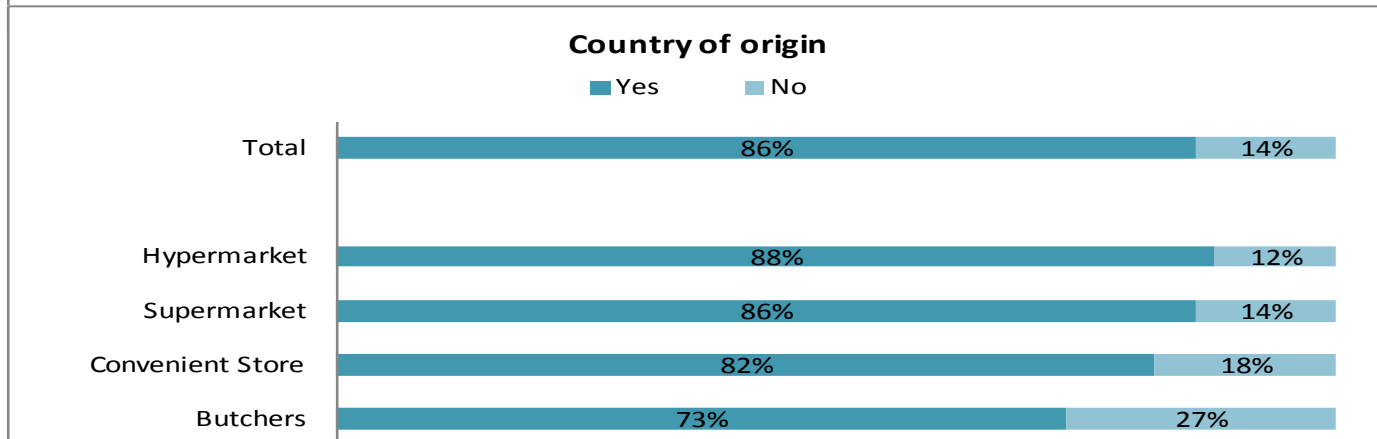
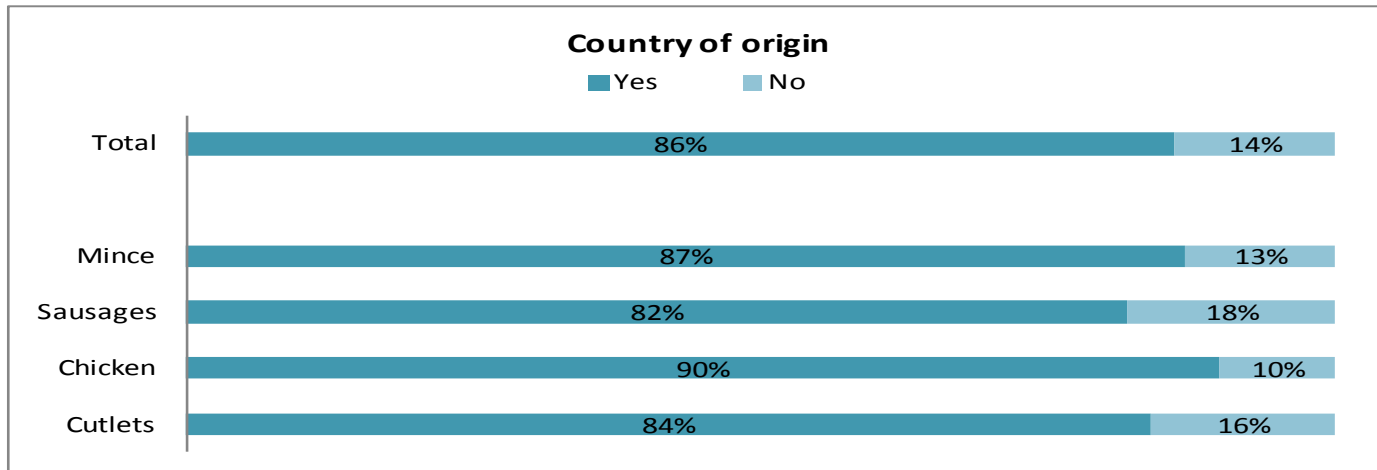
# Share of products checked on which the information was available – date label



# 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

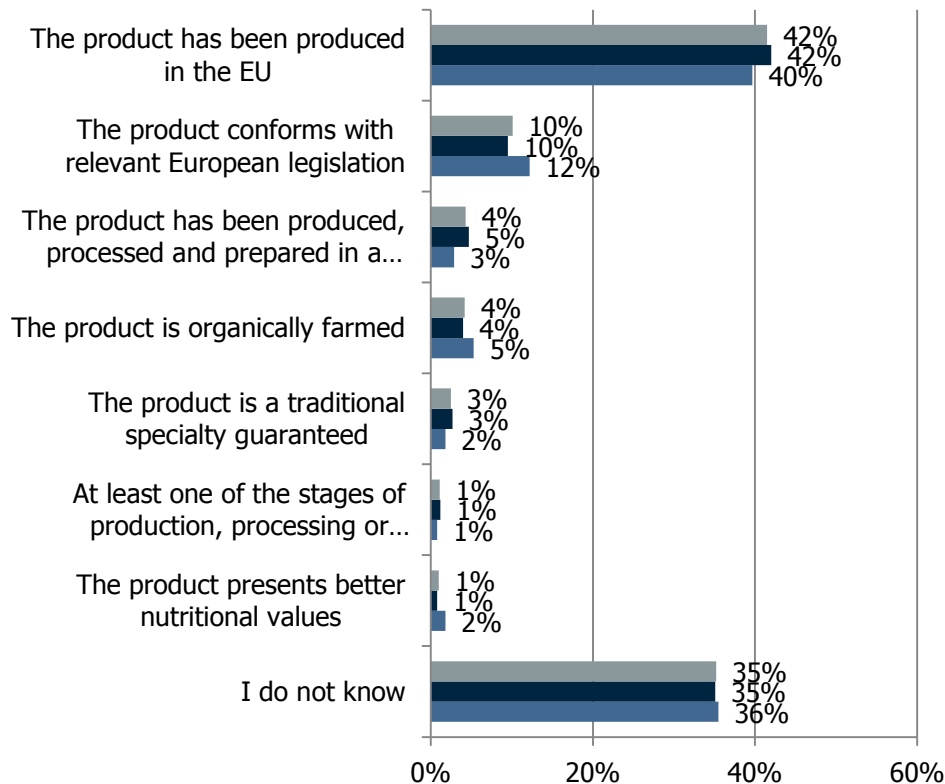


Source: Mystery shopping

Base size: 10570 products

# Consumer understanding – PDO logo

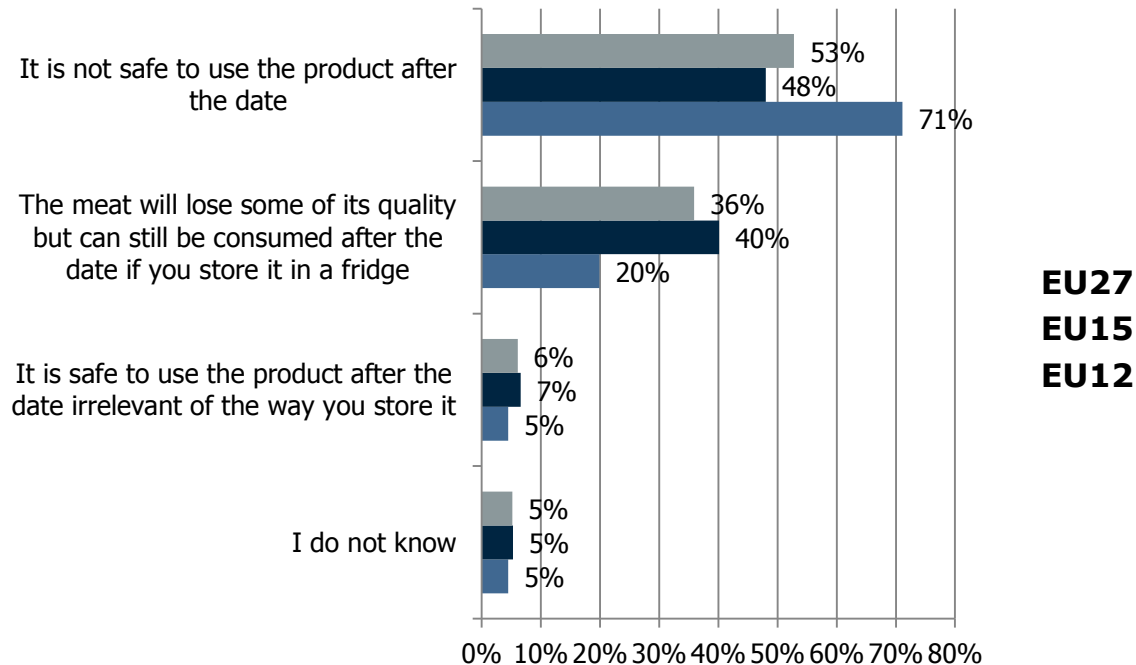
**Q16. Could you indicate which of the statements you think corresponds to the meaning of this logo?**



**EU27**  
**EU15**  
**EU12**

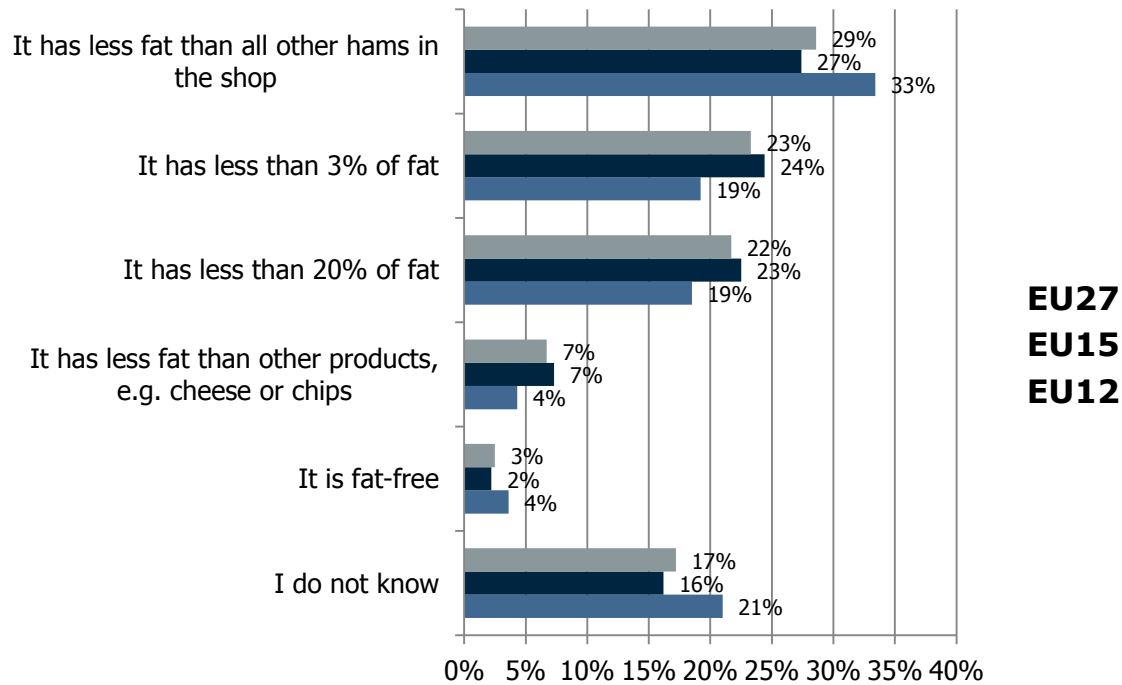
# Consumer understanding – date label

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



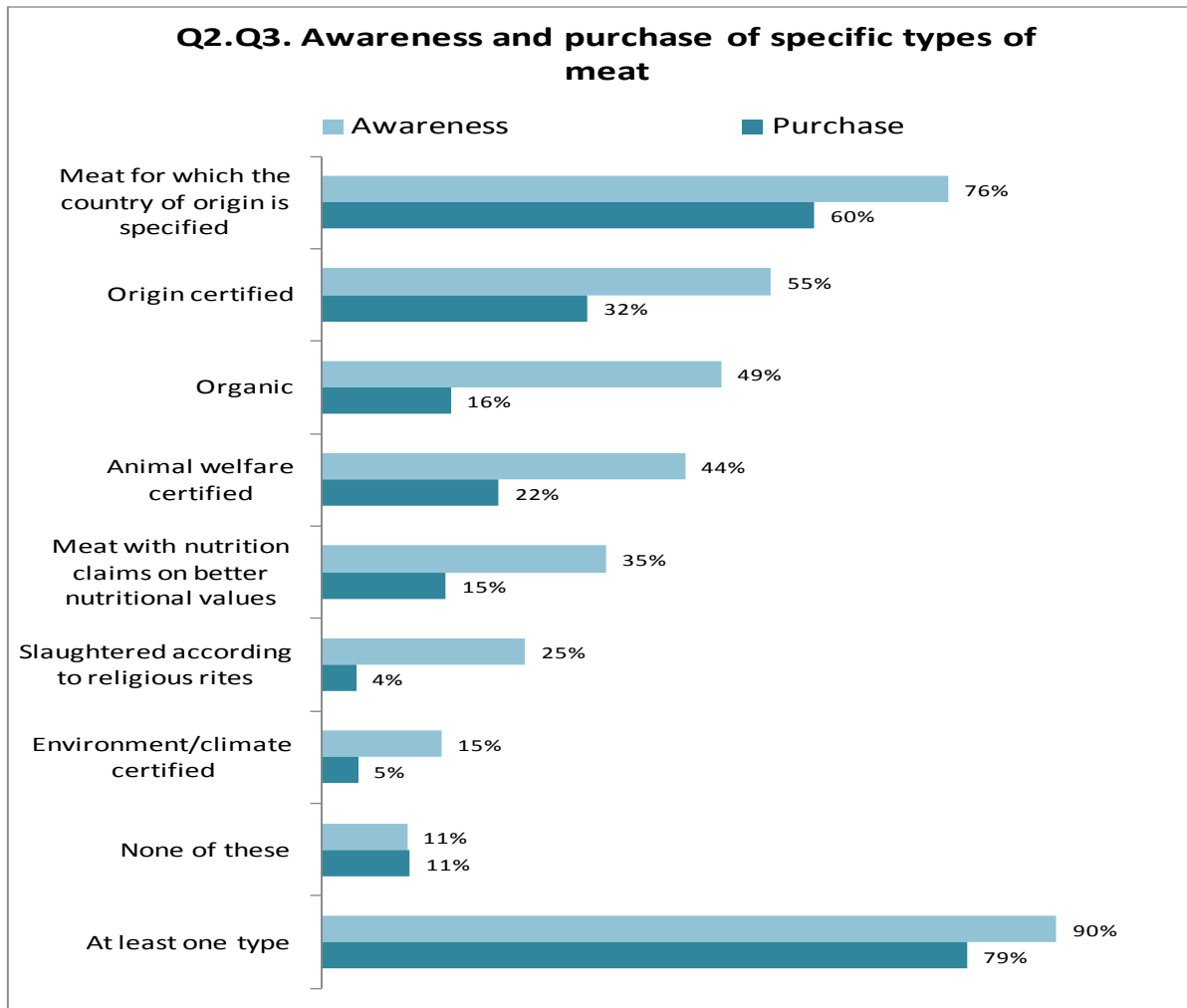
# Consumer understanding – health claim

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



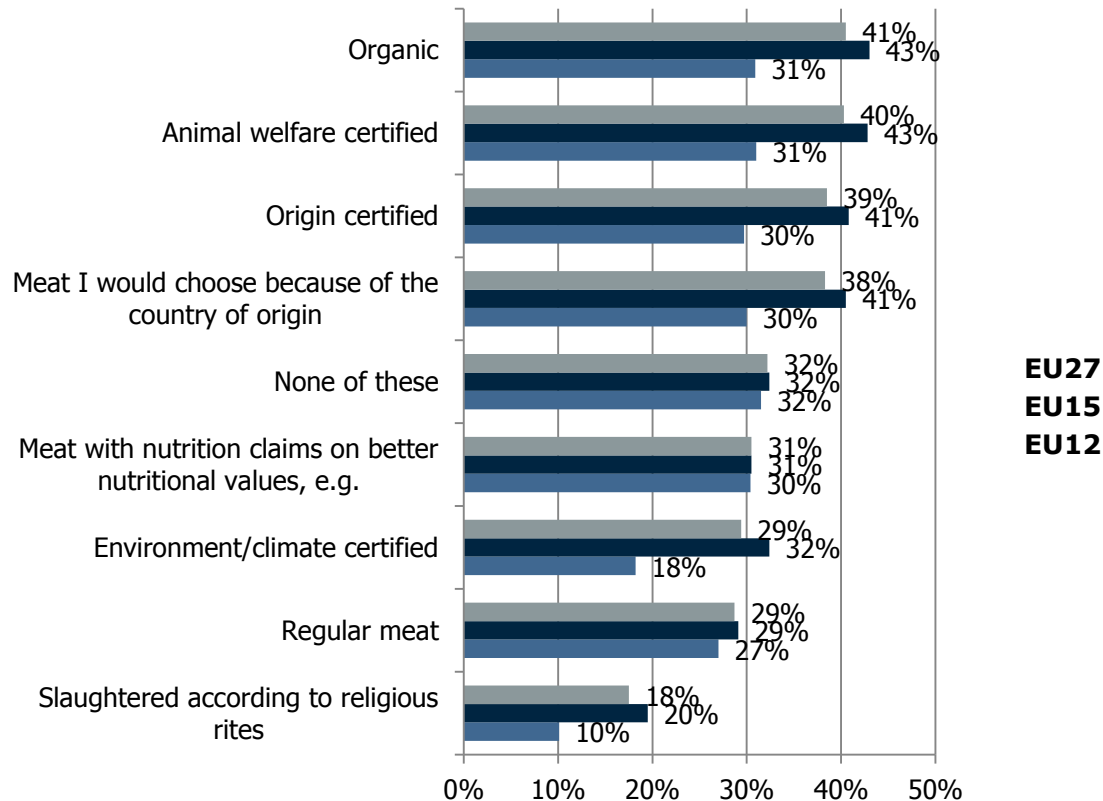


# Awareness and purchase of specific meat types



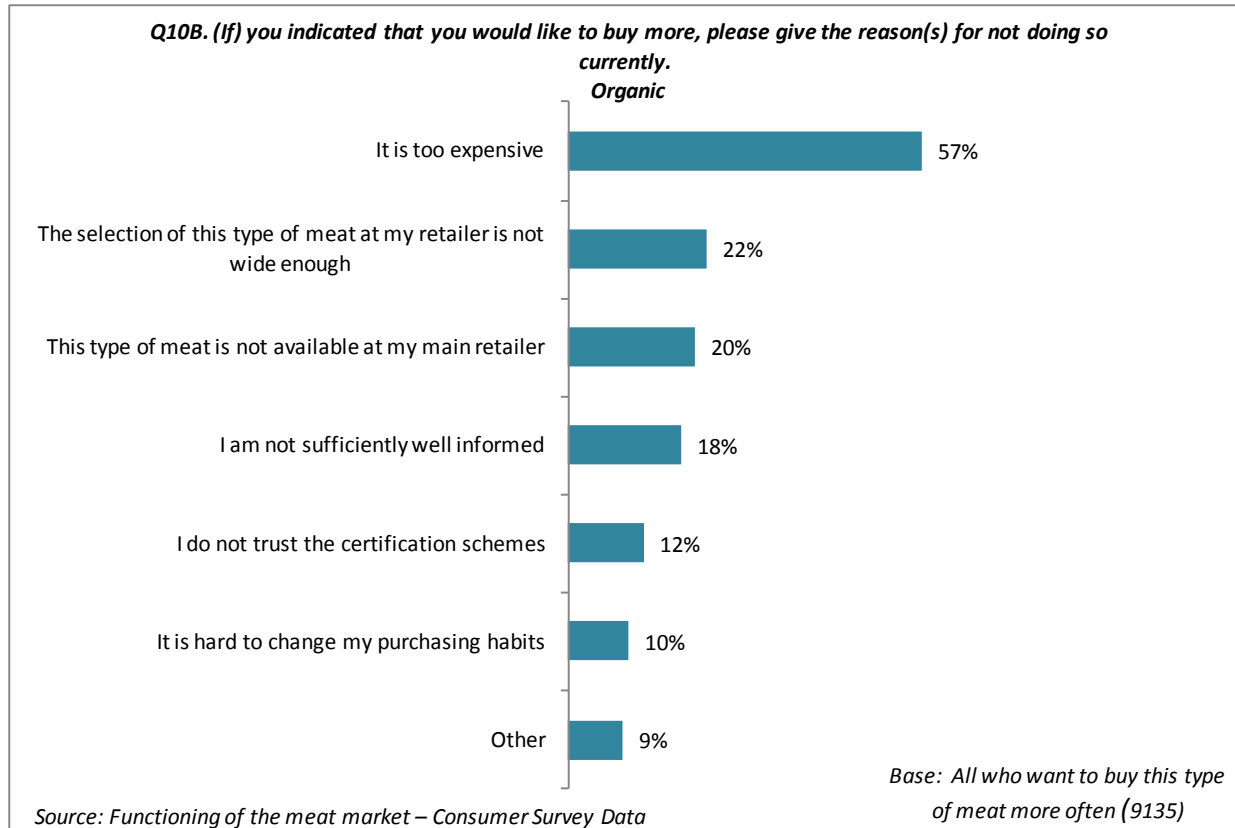
# Intentions to buy specific meat types more often

**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)

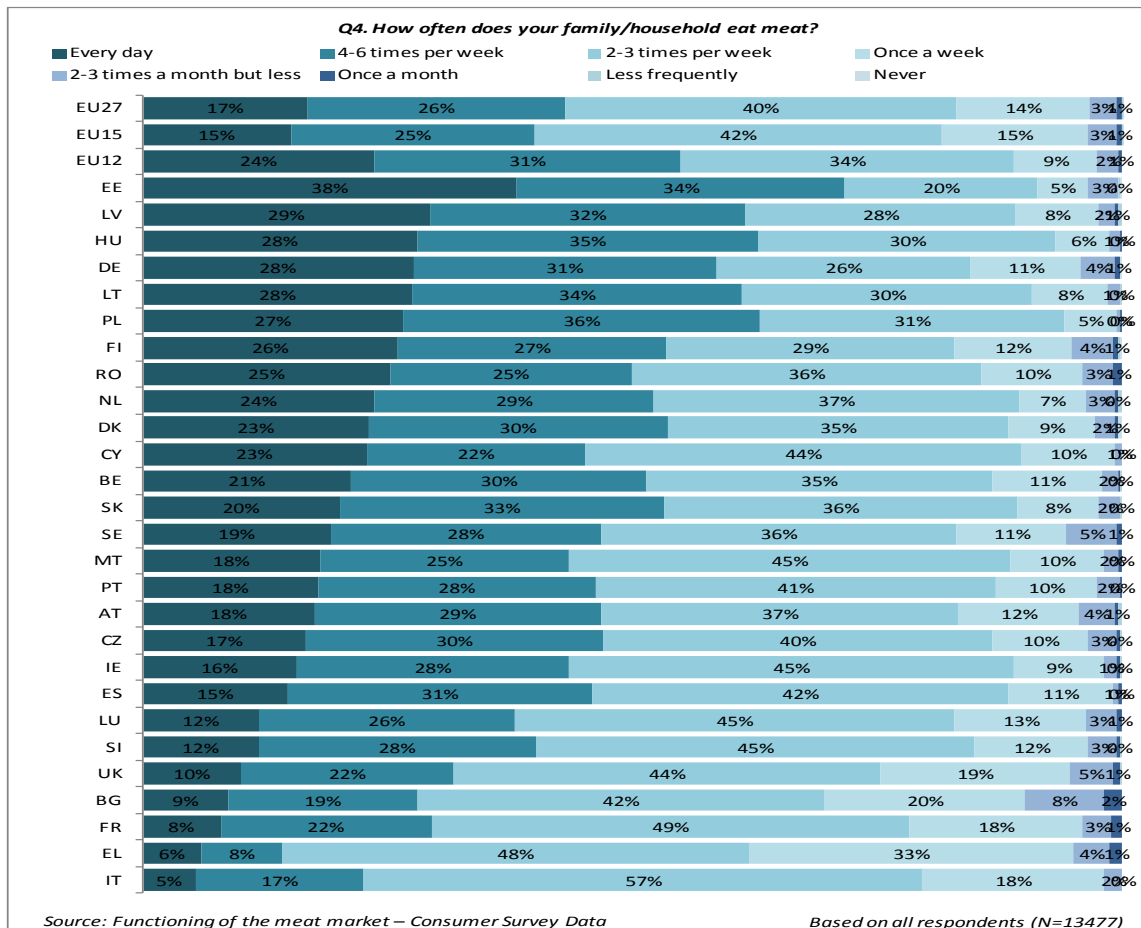
At the level of EU27

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

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

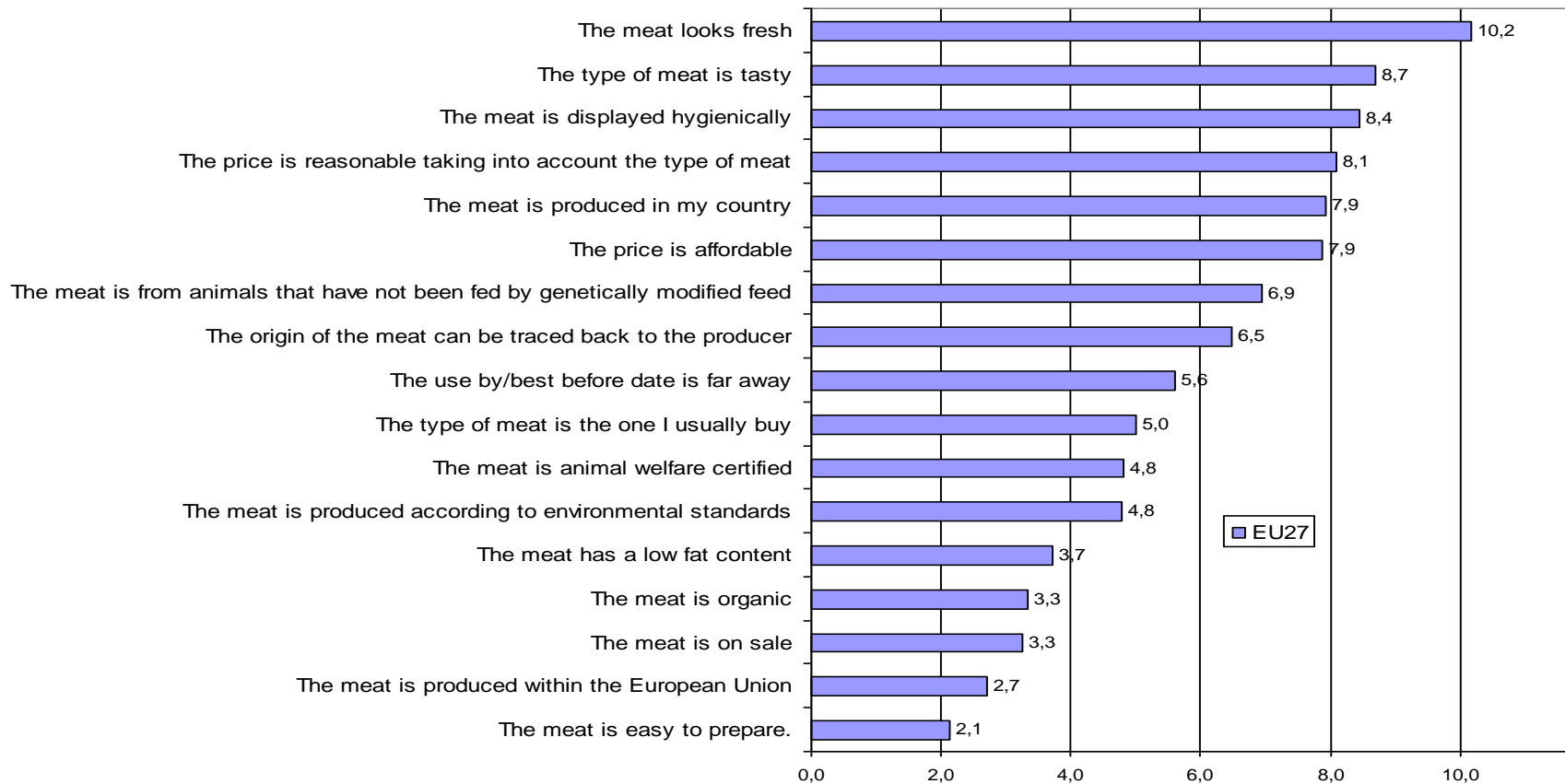
**Animal welfare** certified meat is almost **20%** more expensive than regular meat

# Meat consumption



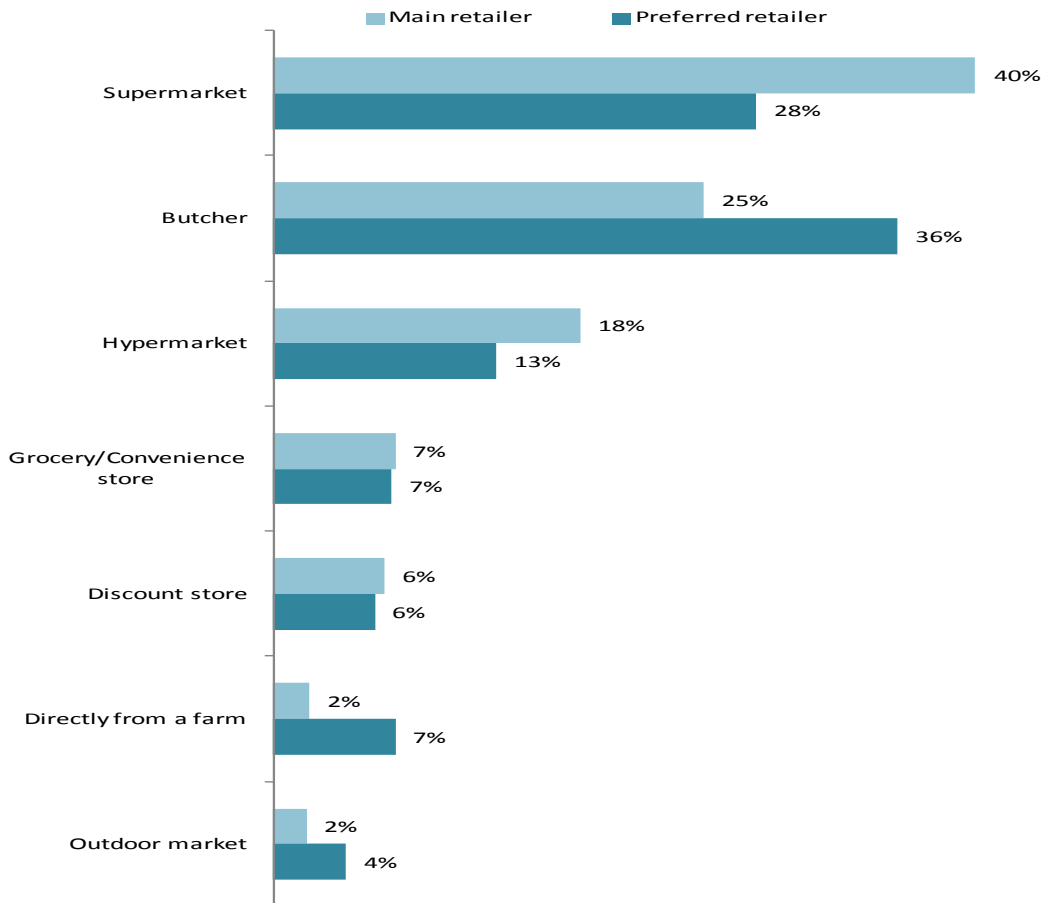
# Consumer priorities

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

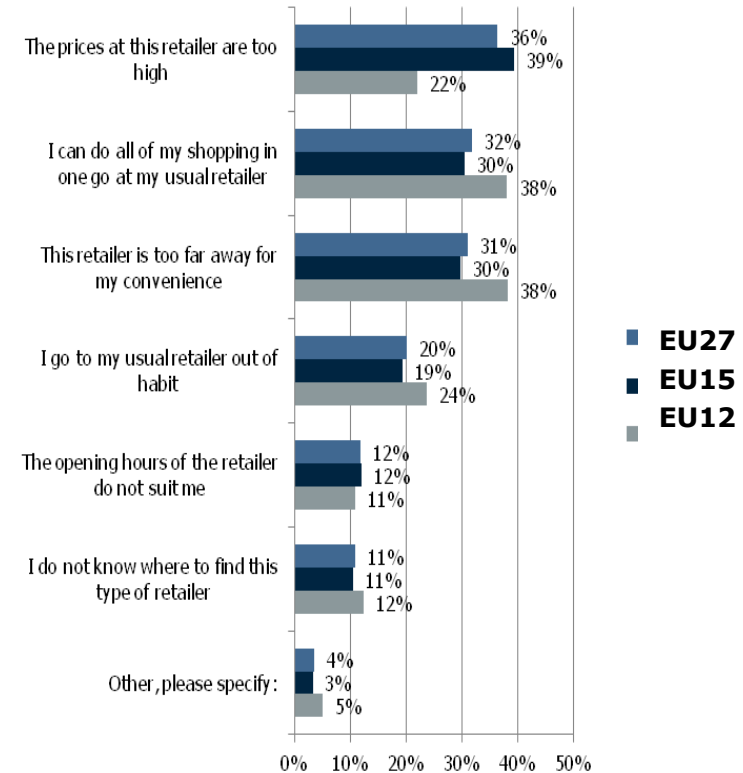


# Use of retailers

**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?**

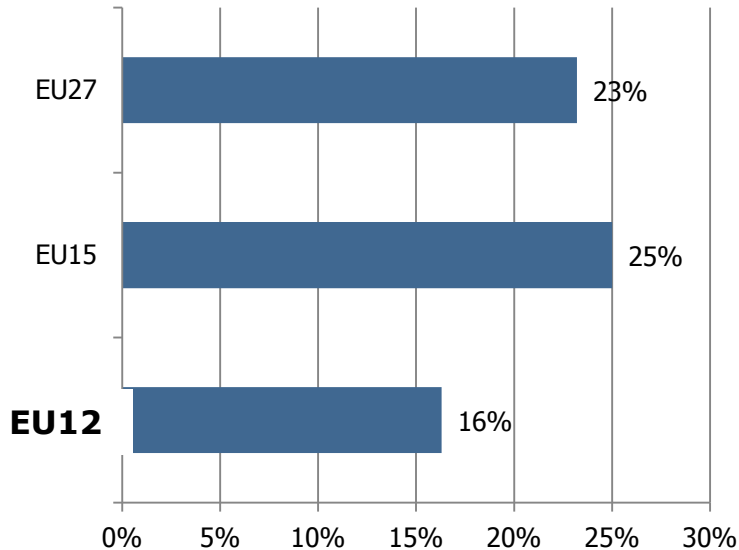


**Q6a. Why are you not currently buying at this retailer?**



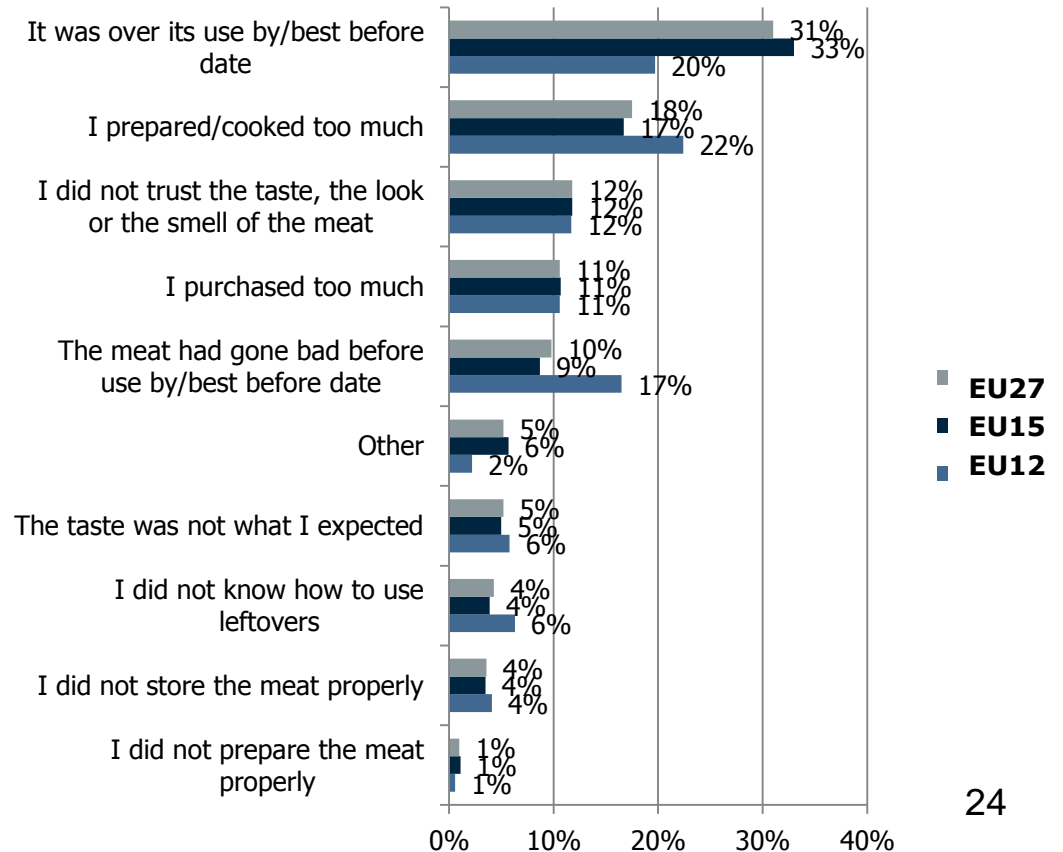
# Food waste

All who threw away meat in the past month



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

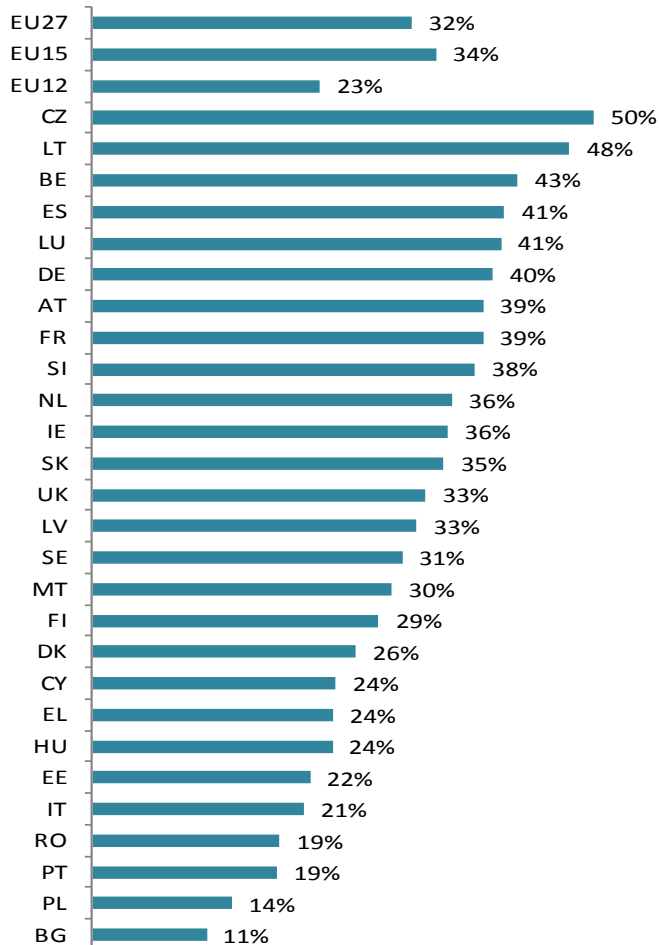
**BASE: Those who threw away meat in the past month**



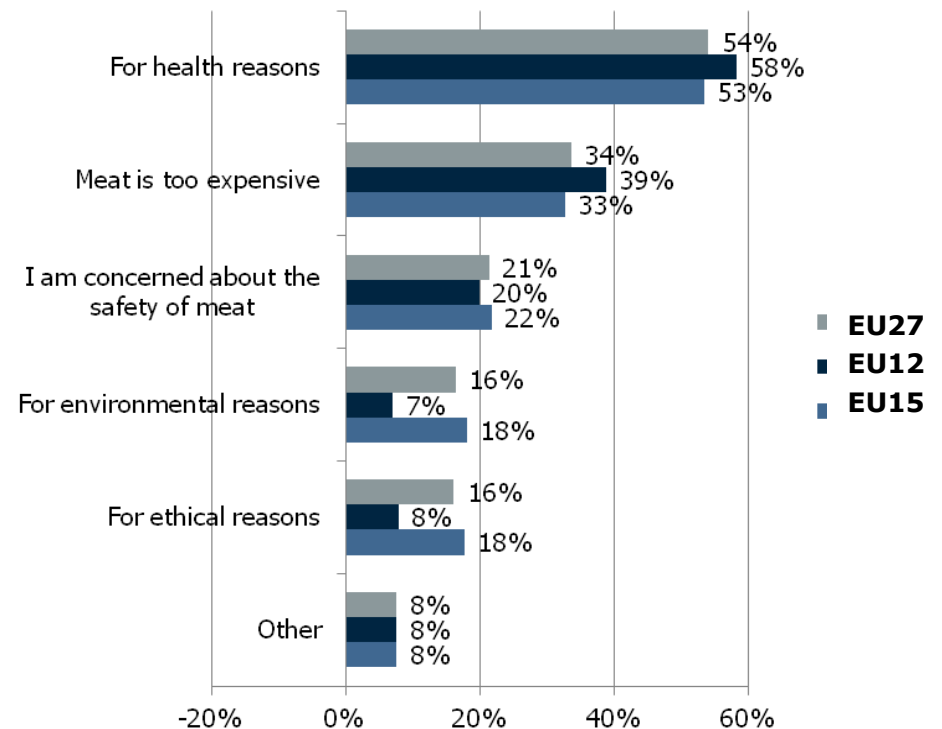


# Consumer intention to buy meat less often

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



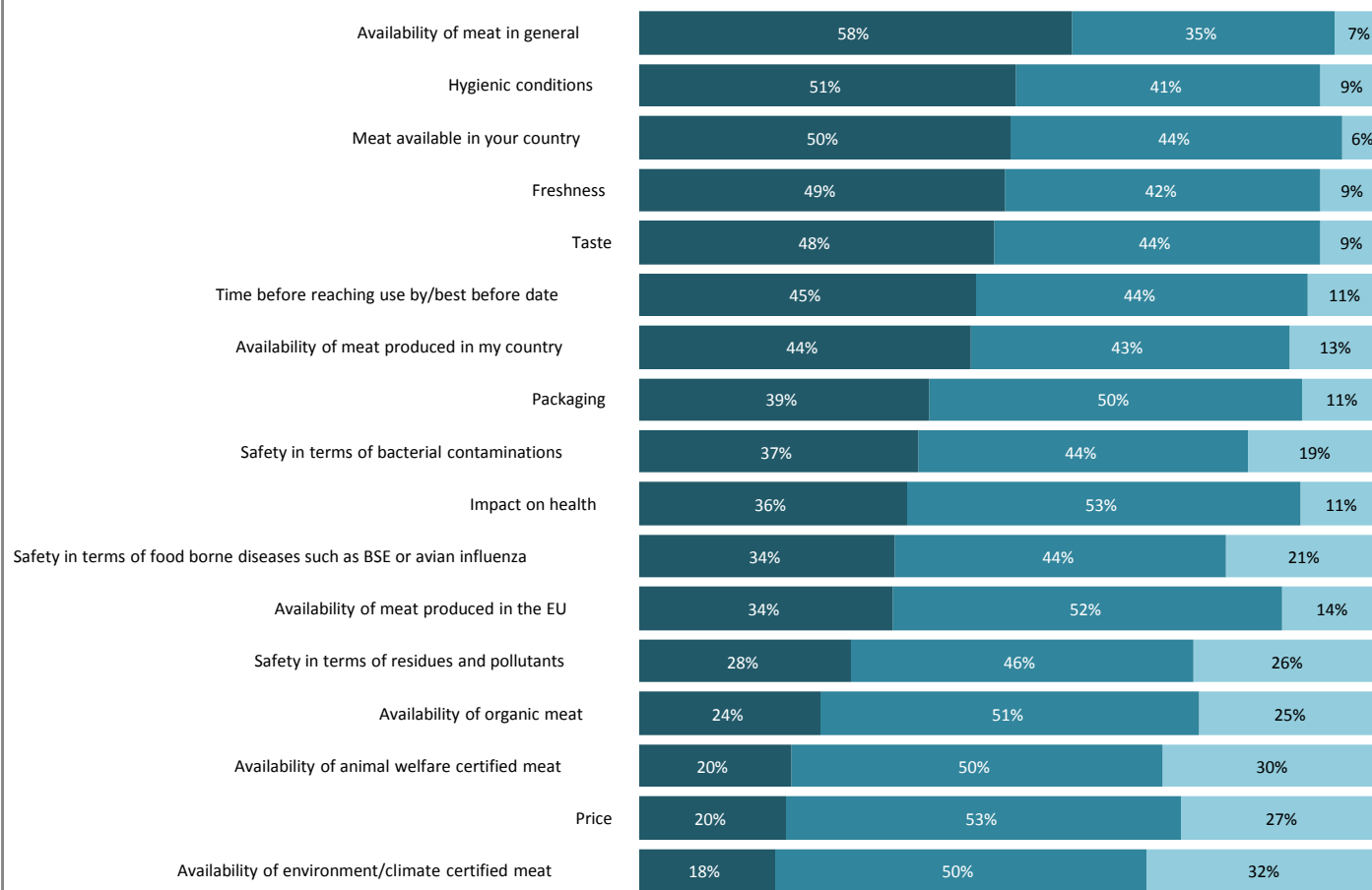
**Q10D. (If) you indicated that you would like to buy meat less often, please give the reason(s) why you would like to reduce your meat consumption**



# 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](http://ec.europa.eu/consumers/strategy/facts_en.htm)**

**For questions, contact**

**[Paulina.gbur@ec.europa.eu](mailto:Paulina.gbur@ec.europa.eu)**