# Consumers' and non-business stakeholders' opinions on sustainability in the soy and beef chain

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# Objective

- To identify consumers' and other non-business stakeholders' attitudes, perceptions and awareness regarding the sustainability of soy and beef supply chains

# Methods

**Consumer survey:**

- Online survey in 2012, organised by UNAM
- Focus on beef
- Conducted in Brazil (BRA), Mexico (MEX), Italy (IT), and Netherlands (NL)
- Sample description: total n=864
  - BRA: n=522
  - MEX: n=140
  - IT: n=131
  - NL: n=71
- Share of persons < 45 years: 41-45%
- Share of female: in BRA 41%, MEX 61%, IT 54%, NL 59%

# Methods

**Non-business stakeholder survey:**

- Online survey, organised by FIBL; separate questionnaires for beef and soy chain
- Sample description:
  - N=48 (of ca. 250 contacted organisations/institutions)
  - LA (Brazil, Argentina): n=26
    EU (Netherlands, Germany, Belgium, Italy): n=22
  - Beef supply chain: n=23
  - Soy supply chain: n=25
  - Mainly representatives of environmental and social non-profit organisations, universities, and agricultural, environmental and health ministries/departments

# Results

- Most important buying motives for consumers when choosing meat/beef
  - Taste
  - Colour
  - Food safety
- Sustainability motives less important

# Results

## Table 1: Relevance of environmental sustainability impacts

| | Consumers | | Non-business stakeholders | |
|---|---|---|---|---|
| **Environmental impacts*** | **Mean** | **Std.** | **Mean** | **Std.** |
| **Water quality** | **5.63** | **1.73** | **5.65** | **1.36** |
| **Soil quality** | **5.56** | **1.67** | **5.83** | **1.13** |
| **Waste produced** | **5.52** | **1.72** | **4.77** | **1.60** |
| **Biodiversity** | **5.52** | **1.82** | **6.08** | **1.16** |
| **Land use change natural land** | **5.50** | **1.84** | **5.69** | **1.60** |
| **Water used** | **5.37** | **1.78** | **5.46** | **1.54** |
| **Mineral resources used** | **5.29** | **1.73** | **5.00** | **1.75** |
| **Land use change within agriculture** | **5.24** | **1.82** | **5.25** | **1.66** |
| **Air quality** | **5.21** | **1.74** | **5.39** | **1.51** |
| **Energy used** | **5.03** | **1.67** | **5.51** | **1.49** |

*Scale 1= not important at all to 7= highly important; Std. = standard deviation

# Results

**Table 2: Relevance of social and economic impacts**

| | Consumers | | Non-business stakeholders | |
|---|---|---|---|---|
| **Social and economic impacts*** | **Mean** | **Std.** | **Mean** | **Std.** |
| **Food safety and security** | **5.98** | **1.70** | **5.38** | **1.78** |
| **Labour rights, including child labour** | **5.69** | **1.76** | **5.38** | **1.70** |
| **Value added in local chain and community** | **5.42** | **1.68** | **5.52** | **1.41** |
| **National economy** | **5.43** | **1.68** | **5.10** | **1.45** |
| **Farm income** | **5.37** | **1.68** | **5.44** | **1.50** |

*measured on scale from 1= unimportant to 7= highly important;
Std.= standard deviation

# Results

**Table 3: Relevance of measures to enhance sustainability according to the non-business stakeholders**

| Measures to enhance sustainability* | Mean | Std. |
|---|---|---|
| Financial compensations | 4.06 | 1.06 |
| Support initiatives | 4.02 | 0.89 |
| Deforestation prevention | 3.94 | 1.10 |
| Support research | 3.94 | 1.12 |
| More priority to local sourcing | 3.85 | 1.22 |
| Advice and training | 3.75 | 1.16 |
| Link of policy agendas | 3.75 | 1.02 |
| Support of production | 3.69 | 1.13 |
| Market transparency and niches | 3.56 | 1.13 |
| Facilitation of trade | 3.52 | 1.32 |

*Scale from 1=not important at all to 5=highly important; Std. = standard deviation

# Results

- Obstacles hindering sustainability according to non-business stakeholders
  - Increasing soy demand
  - Economic interests e.g. the interests of big GM seed providers, of multinational retailers, and of large trading companies
  - Weak regulatory framework at both local and international level; inefficient or non-existent policies for encouraging sustainable production systems
  - LA: lack of enforcement of existing policies; import tariffs
- Most important actors in increasing sustainability:
  - National and international policy makers
  - Large-scale producers and processors
  - Consumers

# Results

**Table 5: Non-business stakeholders: standards' efficiency to enhance environmental sustainability**

| Standard | *Efficiency | Don't know (%) |
|---|---|---|
| **Organic standards** | 3.77 | 11.4 |
| **SAN Rainforest Alliance** | 3.40 | 34.8 |
| **Global GAP** | 3.34 | 22.2 |
| **Business Social Compliance Initiative (BSCI)** | 3.23 | 51.1 |
| **SA 8000** | 3.19 | 42.2 |
| **Leaf marque** | 2.80 | 53.5 |

Scale from 1= very unefficient to 5= highly efficient

# Results

- Consumers' familiarity and perception of efficiency of standards and labels



# Results

- Consumers' familiarity with and perception of labels
  - Organic Labels:
    USDA Organic → known by 30% of the respondents in LA
  - EU Organic label → NL 43%, IT 73%
  - Fair Trade label → NL 80%, IT 66% but only 12% in LA
  - The SAN Rainforest Alliance → 21-24% in LA and EU
  - Organic standards (EU and USDA) considered as most effective standards, followed by Fair Trade standard and SAN Rainforest Alliance standard

# Conclusions

- Policy makers are considered as key players in enhancing sustainability in the beef and soy chain
- Creating policy framework is most important measure to improve sustainability
  - Financial support and incentives considered as most effective tools
- More need for action regarding soy than for beef chain
  - Biodiversity
  - Soil and water quality
  - Waste produced and
  - Land use change from natural to agricultural land

# Conclusions

- Standards (and labels): Non-business stakeholders and consumers consider existing (organic) standards as quite efficient to improve sustainability
  - Improve existing standards rather than creating new standards
  - Sustainability labels, apart form organic and fair trade labels still unknown by large amount of consumers
- Low consumer awareness of sustainability
- (Majority of) consumers will not serve as driver to increase sustainability of beef and soy chain
- Policy and marketing strategies necessary to raise consumer awareness – focus on specific sustainability impacts

# Thank you for your attention!

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