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Chapter 1 European consumers' conceptions of the safety and quality of organic food

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1.1 *Organic consumption on the rise*

The area farmed organically in Europe is continuing to expand. By December 31, 2003 more than 5.8 million hectares were managed organically by some 151,000 farms in the European Union (EU) and EFTA countries (FiBL[1] 2005). This constituted 3.4% of the total agricultural area. European sales of organic products are estimated to have expanded by about 5 percent in 2003 to reach approximately 10.5 to 11.0 billion Euros. Germany remains the biggest national market in Europe (organic sales in 2003 reached 3.1 billion Euros). FiBL notes that Switzerland can be considered the clear organic market leader in Europe, or even the world, with an expenditure of more than 100 Euro per capita per year for organic food. Expectations are that this growth will continue during the coming years. This will happen particularly in the new EU member states, where accession has triggered major growth. The European action plan for organic food and farming[2] as well as other policy support measures can be expected to boost organic farming in all 25 European countries in the future (FiBL 2005).

Despite the growth in production as well as sales, we do not know too much about the end-users, the European consumers, their conceptions, practices and aspirations in relation to organic foods. Research into the organic sector has been gaining momentum in recent years[3], but it has been mainly producer-oriented or even product-oriented. In this chapter we will try to summarize some of the research on consumers in different countries in order to identify consumer expectations, criteria and concerns with

[1] FiBL Forschungsinstitut für biologischen Landbau - The Research Institute of Organic Agriculture. (http://www.fibl.org/english/news/press-releases/2005/0222-organic-europe.php)

[2] COM(2004)415 final COMMUNICATION FROM THE COMMISSION TO THE COUNCIL AND THE EUROPEAN PARLIAMENT. European Action Plan for Organic Food and Farming {SEC(2004)739} Brussels, 10.06.2004

[3] In Europe, up to 80 million Euros per year are currently spent on research into organic farming (http://www.fibl.org/english/news/press-releases/2005/0222-organic-europe.php).

respect to the quality and safety of organic foods. An important task of this review is to point out limitations of the existing research, as well as identifying focal points for future research. More specifically we address two questions:

- What can be said about the criteria European consumers use in their assessments of the quality and safety of organic food products?
- To what extent do we find differences between European countries?

We will also assess some of the strengths and weaknesses of the methods and approaches currently being employed in the identification of consumer criteria. This is the point we take up at the outset (*cf.* 1.2). We then proceed to look at some findings in the literature on consumer conceptions and attitudes that seem to be general all across Europe (*cf.* 1.3). Variations between countries are considerable, which we illustrate in following section (*cf.* 1.4) by taking a closer look at consumers in four countries, Denmark, UK, Italy and Hungary. In the last section (*cf.* 1.5), we discuss implications for strategies for consumer oriented information systems and labelling and for future research on organic consumption.

1.2 *Approaching organic consumers*

Even though research on organic consumers has been relatively neglected, the bulk of literature on this topic from different European countries is quite overwhelming. However, it is unevenly distributed. Considerably more research has been done in some countries, such as Denmark, Germany and UK, than in countries such as Italy or Greece. Whereas Danish consumers have been the focus of a range of studies of different scope, employing different methods and approaches, studies of Italian and Hungarian consumers are more sketchy and of limited scope.

Studies also differ according to the methodology and theoretical approaches they employ. Two main types of research concerning consumers and organic food are studies undertaken within cognitive and behavioural frameworks drawn from psychology on the one hand and those employing sociological or other social scientific approaches on the other hand. Cognitive approaches emphasise constructs dealing with mental structures and thinking processes, often focussed upon the relationship between consumer characteristics, their perceptions of products and their experienced needs and preferences. Many such studies with reference to organic food have been designed to measure consumer ‘willingness to pay’, frequently combined with the task of identifying and distinguishing consumer segments and undertaken with a view to exploiting findings for the purpose of marketing.

A social scientific perspective on food focuses on social relationships, from social, cultural, institutional and political perspectives. This may

concern political and economic issues, as related for example to the distribution of food - including kinds of shopping outlets. It may also concern questions about culture and tradition, in which food is seen as one form of symbolic communication, as a tasty source of pleasure or as a dimension of care in providing for the needs of families. A common theme is that in order to understand consumer experiences with organic food, knowledge of consumer conceptions of key issues such as 'safety' and 'quality' is important. To understand the extent to which organic foods are chosen in preference to conventional variants, an approach is needed that takes account of the contexts of social practices and the manner in which everyday activities are embedded in interpersonal relationships and institutional patterns. Consequently, our focus is not only on consumer choices, but on how these choices are framed by actors on the supply side, by agricultural policies, the logistics or distribution and other similar structural constraints.

Due to the scope of the literature in this field and its variability, we decided to draw a sample. We found it necessary to select a small number of European countries, and we opted to select countries/markets that differed from each other on a number of significant dimensions. Among the main dimensions we found relevant were: the relative importance of the agricultural sector and the relative extent of organic production, the kinds of regulation, labelling and market communication pursued with respect to the organic market, and the dominant types of distribution with respect to organic products. The countries selected as our four case-studies are *Denmark, the United Kingdom, Italy* and *Hungary*.

3. *Organic consumers in Europe – similarities*

Although there are considerable differences between countries, some common dimensions of consumer conceptions, attitudes and concerns, seem to be more or less evident in most European countries. We will look closer at some country differences in the next section. Here we draw attention to the more common themes.

It is possible to observe two distinct trends in European organic distribution and consumption: on the one hand, there is a process of "normalisation", in which organic food is incorporated into mainstream, standardised, high-volume distribution dominated by relatively few supermarket chains. On the other hand, there is what is sometimes called the "niche" market or the "purist" approach. Here, qualities perceived as organic are typically sought throughout the food chain, by suppliers as well as consumers. Distribution is decentralised, sales outlets are typically small-scale, and handcraft style food processing, artisan products and fresh produce are sought. These two tendencies are subject to dispute in organic communities in several countries, and typically there is disagreement about

which tendency represents the most appropriate path of development for the future. However, they are also regarded as strategies that can co-exist and cater to different preferences among consumers. Consumer emphases on environmental considerations (e.g. keeping the “food miles” low), quality aspects related to “handcraft” small-scale processing (e.g. sparse packaging), or personal trust relations, might be harder to meet inside a “normalised” food system. On the other hand, high availability and low prices are examples of consumer demands, which might more easily be met by mainstream systems.

Some specific concerns, which arise repeatedly in the literature, include worries related to the use of pesticides, food additives and the use of genetic manipulation in food production. These aspects are often seen as constituting main differences between conventional and organic production methods. The important point at issue is often the consumer’s distrust of producers’ motives: the perception that these practices reflect an interest in profit rather than the production of good food. Concepts such as “homemade”, “natural”, “pure”, “clean”, “proper” and “decent” food are used to express preference for food products that has been produced with little or no use of artificial fertilizers, pesticides, food additives and technologies such as genetic manipulation. The review thus shows that consumer concern about food quality and safety embraces broad and interconnecting concerns. Health, environmental concern, authenticity and taste, and moral concerns about the relations between people and nature are examples of broad themes that recur in the literature. Health and the environment tend to be interwoven as a motif for buying organic food, particularly among those who frequently buy these products. A typical rationale is that healthy soils, plants and animals are basic to human health, and that therefore care and concern for any of these environmental factors will also cater for better human health. Other examples of interwoven themes are “sustainable eating” and “healthy eating”, which in practice involve many of the same elements.

Environmental concerns are central for many consumers with regard to organic food. In addition to issues already mentioned, many consumers wish for limited transportation of food (keeping “food miles” low), limited food packaging, the use of environmentally friendly packaging, and are concerned about energy expenditure in the food system in general as well as the use of natural resources.

It is consistently found that the consumer’s choice of organic food is related to some kind of health concern, but there are large gaps in our understanding of how consumers relate organic food to various aspects of health and the avoidance of illness, and in which contexts they do so. Several studies conclude that health concerns are more significant than environmental concerns, even though – as discussed in the section above –

the two may be interconnected. The relationship between "food scares" and buying organic foods for health reasons is frequently referred to in the literature.

Organic food is empirically related to several types of "food scare" and to post-industrial types of risk – risks, that is, limited in neither time nor space, since future generations and the whole planet may be affected. Choosing organic food might be seen as a way of providing for personal health, the health of future generations, or for what has been called "agro-ecosystem health", which in turn would serve to promote human health. Developing a better understanding of the way in which health concerns relate to various levels of well-being – from avoiding illness to enhancing full bodily, spiritual and social well-being – is an important challenge yet to be taken up by researchers.

Ethical considerations relate to a wide range of issues and are often reported as being important to consumers who choose organic food. Consideration for the environment, animal welfare in food production, for fellow human beings involved in food production, and for the health and well-being of the people who are served food on an everyday basis, can all be seen as ethical concerns. These concerns may also be linked to religious faith, which, by providing directives about what should be eaten and what should not, may constitute a reason for eating organic food. There are also a number of social and ethical concerns, which we will return to consider in Chapter 9.

Food quality is another concept of crucial importance in understanding consumer attitudes to organic food. This concept also needs to be better understood, and its specific meaning must be investigated thoroughly in any given context. A number of definitions have been suggested and applied, some of them technical, others less so. It is evident that expectations about the eating quality of products (e.g. taste and freshness) are as high for organic foods as they are for conventional food, in some cases higher. Several concepts referring to "inner" food qualities that are assumed to have importance for human health are used in connection with organic food. Our review of the literature indicates that consumer attitudes to and concepts of the quality of organic food vary between countries and in different contexts. We need a more thorough understanding of this than we have at present.

However, organic food may also be understood as having less specific product attributes, being interpreted as a "lifestyle" choice. This concept refers to the way in which individuals seek to establish a meaningful and reliable sense of self-identity under conditions of high modernity. "Lifestyle" refers to a relatively integrated set of practices chosen by an individual in order to give material form to a particular narrative of self-identity. Within the frameworks of routine everyday lives, people cannot

manage to deal constantly with a plurality of possible choices. We need some generalized symbols or principles that can help to put in place our more or (rather) less explicit needs and wishes. Organic food may represent one such principle.

1.4 *Organic consumers in four countries: differences*

As already mentioned, there are considerable differences across Europe with regard to how the food system is organised, and there are also major cultural differences regarding the role of food in society and everyday life. Such differences in the framing of consumer choices are likely to have a bearing on several issues, among them consumer strategies for seeking information and consumer trust in various sources of information. They also have a bearing on issues such as performance and accountability, responsibility and power. It is important to understand the relative importance of various food system actors, as consumers perceive them, when they orient themselves about food quality and safety.

In order to get a grip on such differences we looked closer at the literature on consumers of organic food in four countries: Denmark, UK, Italy and Hungary. In this section we will describe the organic market in these countries, somewhat sketchily, and then more thoroughly report on what the literature tells us about organic consumption in each country.

Both Denmark and the UK have a relatively long history of organic production, which in political and economic terms remained an insignificant niche until the mid-1980s and early 1990s. This history is considerably older in the UK, but in both countries farmers' organisations have played a significant role in the development of organic production, the setting of standards and the establishment of certification procedures. The organic sector in Denmark, however, is considerably larger in relative terms as regards the current level of consumption of organic foods.

Danish consumption of organic foods has become "normalised" in the sense that only a very small percentage of the population claim that they never buy these products. Political stakeholders have played a central role in the development of the organic sector since the early 1990s by providing subsidies for conversion, developing broadly based action plans with regard to production, marketing, promotion, regulation and research and, perhaps most importantly, by establishing a single, national state-controlled organic label. The consumer market in the UK on the other hand constitutes a good example of a liberal market, in which a variety of organic labels, none of which are state controlled, compete for the attention of consumers. This is a market in which demand has long outstripped supply from British farmers and growers, such that at least one third of the supply relies on imports.

In contrast to both of these consumer markets for organic food, those in Italy and Hungary are relatively smaller as well as being more recent.

Italy has been witnessing a dramatic rate of conversion to organic agriculture since EU subsidies became available, but a relatively low level of demand on the domestic market. Among the distinguishing characteristics of this market are strong traditions regarding regional produce and regional gastronomic traditions that are held in high esteem. Hungary was selected as an example of countries belonging to the central and eastern region of Europe and, until recently, outside the European Union. As in Italy, there is considerable organic production for export, mainly to the northern and western European region. There is however virtually no domestic market. A Hungarian organic label was introduced only very recently.

We will now turn to the consumer side, to look at variations in demands and expectations. With regard to eating quality, some *Danish* consumers perceive some organic foods as having a better taste than their conventional counterparts. With regard to other aspects of quality, importance is attributed to the effects of production on the environment, concerns about food processing, animal welfare, and human health/quality of life. Importance is also attributed to the production and sale of foods within the domestic market, as contrasted with imported products. With regard to safety, worry and fear are expressed in regard to the use of chemical pesticides, medicines and growth hormones in animal production, food pathogens of significance for human health, and the possibility of GM contamination of organic products. Full information as a basis for informed choice is emphasised, including information about ingredients, product origin, methods of processing and methods of production.

Several studies have been conducted in *the United Kingdom* regarding consumer concerns related to organic food, including commercial market research and academic studies. There seems to be a relatively broadly based knowledge of organic food among UK consumers, many of them having encountered organic products in supermarkets. It appears that there is more research done in some regional areas as compared to others, and there are also indications that there are regional differences in the use of and possibly in attitudes towards organic food. Some British consumers perceive organic food as tasting better, or they associate organic food with the quality of “home-made” food. Organic food is perceived by many as having benefits related to a series of interwoven values focussed around health, safety and environmental soundness, as “pure” or “natural” food, free from artificial additives, fertilizers, pesticides and growth hormones, products from “not intensive production”, products which have been produced without the use of genetically modified organisms, etc. Ethical issues related to organic food include fair trade, workers social rights, environmental impacts in third world producer countries, equity among people involved in the food chain, and among citizens affected by the use of natural resources. Issues of

animal welfare (for example, with regard to natural rearing and humane slaughtering) and environmental protection are also among the ethical concerns related to organic food. Perceptions of the environmental soundness of organic agriculture are seen as being related to the absence of chemical pesticides and fertilizers, and often seen as key features of organic production methods. Emphasis is given to information from credible sources, and claims from manufacturers about their own products are seen as not having a high level of credibility. Many consumers want information about the origin of the food (country, region and locality), the origin of ingredients in processed foods (for example related to risk of GM ingredients), methods of processing and methods of production. This is not only associated with risks or trust issues. For many people, organic food represents local sourcing and is therefore also an indicator of freshness.

The review of available *Italian* literature in this field has revealed that much fewer studies have been carried out in this country. Our observations are therefore only tentative. Appearance and taste are reported to be of importance for choosing organic food. However, other studies indicate that Italian consumers do not seem to place priority on the appearance of products, thus indicating that they use other quality criteria apart from appearance when it comes to evaluating food. Health is important to the majority of consumers, and this issue might be even more prominent than environmental issues in Italians' self-perception of their reasons for buying organic food. Consumers who buy organic foods seem, in general, to be more ethically concerned and idealistic than conventional food buyers. The origin of the food is important, but one study indicates that consumers in fact view the origin of the food as a proxy for quality. Animal welfare as an issue is absent in the studies we have reviewed. With regard to safety, worry is mainly expressed in regard to the use of chemical pesticides in agricultural production. Trust relating to food purchases is more often based on personal interaction with the salesperson than on brands and labels. But the issue of trust is also touched upon in connection with confidence in quality labels. Lack of knowledge of labels and information about the meaning of the term 'organic' is taken up as a central theme in several studies. The research we have examined was undertaken mainly for the purpose of exploring market potential, and was based on relatively small samples that cannot be assumed to be representative of larger groups of consumers. Contradictory findings are evident in relation to sensitivity to price, attitudes to appearance, and in relation to some reports regarding the demographic characteristics of consumers. These contradictions reflect methodological problems in these studies.

Based on the very limited literature available from *Hungary*, only very tentative observations can be made. The low availability of organic food on the domestic market is a major point. This must be kept in mind when

considering results indicating “lack of demand” as a hindrance to the development of the domestic market – although some acknowledgement of consumers’ limited purchasing power is also indicated as a factor influencing the level of demand. Particularly in this context, it is crucial not to overlook the factors that frame and limit the actual choices that consumers have (or perceive themselves to have). Another question – and one that might have particular relevance in countries with a history of state ownership of farms – concerns the character of market development and the degree of “consumer-orientation” in agriculture. With regard to quality aspects emphasised by consumers who do purchase organic food, the few available studies indicate that health is currently a main focus among them. Moreover, there is reference to a generally held view that agriculture is not associated with environmental pollution.

1.5 *Concluding remarks*

As the section above indicates, the picture of European organic consumers is quite heterogeneous, and very much dependent on country specific market structure and institutional history. Consumer choices are to a great extent framed by these structural factors. In this regard, levels of consumption and ‘demand’ need to be understood in the light of studies regarding supply-side strategies and the availability of products and of product information to consumers.

Labelling is one important factor in this respect. Clear and simple labelling of organic food is important to consumers. At the same time, many consumers want more in-depth and more comprehensive information about food products and the food system behind them than a label normally allows. This seems to be a paradox. However, both needs can potentially be met by diversified information strategies.

Lack of information and knowledge is likely to have a bearing on the way in which organic food is perceived by consumers, and on their reactions to news items and other information about various issues, as well as to different kinds of information strategies. Moreover, trust in labels and other sources of information emerge from this review as important consumer issues in relation to organic food. In this respect, perceptions of a food system and perceptions of a food product are often related and interlinked. Consumers request information about such matters as the origin of foods, methods of production and food processing, the distribution of profits, the distance the food has travelled and packaging. The wishes for these types of information indicate that trust refers to the organisation and performance of the organic food provisioning systems as well as to sources of information.

Information about organic certification is important to consumers, and there is evidence of some confusion on this point. Differences between

European countries with regard to systems of certification and the number of labels on domestic markets are likely to be important determinants of confusion regarding product differences and of the ways in which consumers view and experience food products more generally. It is important that the rules and regulations should be made available to consumers. But it is also important that consumers have the opportunity to relate news items and other items of information about regulations and codes of practice to a broader understanding of the contexts of production and the objectives of producers. Thus, information strategies must be approached in the light of consumers' present knowledge about food and food system issues.

One might argue that organic food – certified and labelled – in itself already provides more food system information to consumers than is normally the case with conventional food. The organic food system is generally subjected to stricter regulation than the conventional food market, and buying organic food might in this respect be seen as a simple way to deal with challenges and uncertainties associated with the contemporary food supply. At the same time, however, it must be noted that people who choose organic foods in preference to conventional foods, include many critical, knowledgeable consumers whose information needs and demands are particularly high. The reason for buying organic food may be a general rejection of or distrust in conventional, mainstream systems. The issue of information needs within organic food systems needs to be further addressed. The exploration of an *Organic HACCP* approach is desirable in this context. One solution may be the provision of simple labels with clear and explicit reference to certification rules and to where more detailed information about background, enforcement etc., can be obtained.

Despite the overwhelming bulk of literature on organic consumers, the picture still remains sketchy on many points. There are only a few broad genuinely comparative studies, and a lot of countries are poorly covered. In this respect we need more research on organic consumption in central, eastern and southern regions of Europe. There are also few studies looking at consumer attitudes, preferences and actual purchases in relation to the structural features of particular markets. We need more studies of this kind. We also need far more studies combining quantitative data suitable for generalization with more qualitative in-depth data that can reveal cognitive structures and conceptualisations. More specifically, we need to know more about:

- Consumer conceptions of the *quality attributes* of specific food products and product groups.
- Consumer conceptions of quality attributes as compared with conceptions among other stakeholders.

- Consumer conceptions of *food safety* as compared with those of other stakeholders.
- Whether and to what extent consumer conceptions of food safety regard a quality attribute of specific *products* and product groups or a property of *production and distribution systems.*
- Reasons why some producers and some consumers maintain a preference for organic products sold/ purchased through *direct distribution channels*
- Dominant conceptions among each set of stakeholders in chains of organic production and distribution with regard to other groups of stakeholders in that chain
- The *accountability of stakeholders* in the organic food system, satisfaction with existing methods of accountability and barriers to the institutionalisation of consumer wishes with regard to accountability in the food system more generally.