Functioning of the meat market for consumers in the European Union

Report based on findings of the "Study on the Functioning of the meat market for consumers in the European Union", prepared by GfK EU3C (EU Custom Research and Coordination Centre) on behalf of the European Commission, Directorate General for Health and Consumers, December 2012

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Background

The 2007 Single Market Review called for a more evidence-based approach to policy making and better monitoring of markets. In this context, the Commission developed a methodology to help monitor markets from a consumer perspective in two phases: a screening and an analysis phase.

The screening of consumer markets to identify the markets with the highest risk of malfunctioning for consumers is carried out through an annual Consumer Markets Scoreboard, first published in early 2008, and most recently in November 2012. The choice of the meat market for further in-depth analysis is based on its ranking as one of the lowest performing goods markets for consumers. The study was undertaken as a follow-up to the fourth Consumer Markets Scoreboard, where the performance is measured in areas such as consumers' ability to compare offers, consumer trust in retailers/producers complying with consumer protection legislation, problems experienced by consumers, consumer complaints and whether the market has lived up to what consumers want. Another important criterion is the 4% share meat has in the household budget. This market is also highly regulated, in particular in terms of factors which could impact on consumer trust. Finally, consumer decision making around meat products is complex, given the different aspects of the decision: price, quality, trust, safety as well as ethical and environmental considerations.

The in-depth analysis addresses which areas of the market do not function as well as they should for consumers. While the Consumer Markets Scoreboard is an instrument to detect potential problematic areas, a study aims at reaching further. This study explores how consumers make decisions or choices about purchasing and consumption of meat, from the perspective of safety, quality, health, sustainability, animal welfare, origin and price. It identifies specific shortcomings and possible ways to remedy the situation. It also provides evidence regarding consumer understanding and use of information, which could be helpful for both EU- as well as national-level policy making.

Evidence was collected in all Member States through a consumer opinion survey, a "mystery shopping" which audited availability of products and information to consumers in shops, surveys addressed at national and EU stakeholders, and desk research. The analysis presented in the study report is based on both primary data collected for this study, as well as available secondary data, such as information from the Eurostat household budget survey.

This report presents the main conclusions of the study, while also providing information about certain on-going Commission activities relevant for consumers in the meat market. In particular, it touches upon issues which are problematic for consumers, and suggests solutions (including conclusions stemming directly from the study itself and those resulting from a broader reflection) that could help improve market conditions for

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1 To be published; general link: [http://ec.europa.eu/consumers/consumer_research/cms_en.htm](http://ec.europa.eu/consumers/consumer_research/cms_en.htm)
3 For the purpose of this study, the definition of the meat market covers fresh meat and meat products (processed in some way. Catering services were not included in the study.
4 "Mystery shopping" is a research technique, where surveyors pretend to be consumers and their task is to replicate consumers' experiences.
consumers as well as support them in their decision making. The suggestions provided are in line with the Consumer Agenda\(^5\) and the Commission Staff Working Document on Knowledge Enhancing Aspects of Consumer Empowerment\(^6\).

Methodological details of the study are available in the study report published together with this report\(^7\).

**Introduction**

For the purpose of this study, the meat market was defined as follows: *fresh meat (cuts and pieces of meat, for example whole chicken, steak, minced meat, etc., including frozen meat and meat preparations) and meat products (processed in some way, such as marinated or cooked meat, for example salami, hot dogs, cooked ham, precooked sausages, etc.) covering beef, pork, lamb and poultry, which are available for final customers at the end of the food supply chain (at the retailer).* The EU market for fresh meat and meat products is highly regulated. Provisions aimed at ensuring safety and the right hygienic conditions are put in place, as are rules to provide consumers with information. However, consumers still seem to be cautious and they trust suppliers and retailers to a lesser extent than in other food markets\(^8\).

In recent years there have also been a number of food crises in the meat market, which were highly covered in the media, who, while informing consumers about the situation and improving transparency of the market, may have also contributed negatively to the image of the meat market in consumers' eyes. Even the most recent events concerning the presence of horsemeat in products that, according to their labels, should not include it, have been widely covered in the media and have generated numerous discussions. The developments showed that the EU rules on traceability work and, even though the supply chain is very complex, the sources of misleading information could be identified. On the other hand, however, the horsemeat issue has revealed that some food business operators still try to conduct their business in an unfair way. This only proves the need to maintain the constant monitoring of the market and to provide consumers with fair information, and both these needs are addressed in the Commission Action Plan on horsemeat\(^9\). It is important to note that this study was carried out before the outbreak of the horsemeat scandal. Neither the intention to carry out the study, nor the conclusions presented in the study or in this report are linked to the recent developments. The evidence gathered can only support the Commission's and Member States' activities in the field of food information for consumers and official controls in the market.

The rules, developed as prevention and also in response to problems, often assume that consumers are rational and ready to dedicate time and effort to keep themselves informed about different aspects of the market, for example products and their quality. They also seem to assume that consumers have the ability to understand the vast amount of information provided to them. The reality shows, however, that despite positive

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5 Communication from the Commission "A European Consumer Agenda - Boosting confidence and growth", adopted on 22 May 2012
6 Staff Working Document adopted on 19 July 2012;
7 http://ec.europa.eu/consumers/consumer_research/market_studies/upcoming_studies_en.htm
9 http://ec.europa.eu/food/food/horsemeat/plan_en.htm
intentions, consumers have limited resources in terms of time and energy to be able to process all available information. It appears difficult to strike the right balance between consumers' need to be informed of all aspects that are important for their meat purchases and their capacity to understand and use the information.

Consumers want to be informed, and they also expect from the market a wide choice and fair prices. Choice means not only the range of products available – meat categories or types – but also a sufficient number of different retailers to buy meat from. Fair prices should reflect the quality of meat and meat products and they should also allow consumers to afford healthy products or in general help consumers turn to a more sustainable consumption.

Information

Adequate information is a prerequisite for consumers to be able to make the right choices when buying meat or meat products. Adequate means that it should not only cover a sufficient number of information aspects, but it should also be understandable and easily accessible for consumers, and it should come from trusted sources. These general requirements apply to any consumer information, but they are even more valid for markets where consumers spend a significant share of their budgets, and where they cannot or are not willing to get too much involved in seeking information.

Aspects of information consumers look for

There are numerous aspects of information that consumers find on meat and meat products, both mandatory information and information provided by producers or retailers on a voluntary basis. Some aspects aim at ensuring safety for consumers, for example a use by date, whereas other messages are designed to describe specific characteristics of a product and to convince a consumer to buy a particular product.

To shed more light on the information aspects that are most important for consumers, respondents across the EU were asked what they look for when they buy meat. This question focussed on 15 information aspects, regardless of where this information could be found (on labels or obtained from retailers' staff).

The results presented in figure 1 show that the information aspect looked for by the highest share of consumers is the use by / best before date. 68% of respondents across the EU look for the date label. In countries that recently joined the EU consumers are in general more interested in the date label than in the EU15 (77% compared to 65%). While the results do not differ between fresh meat and meat products, significantly fewer consumers look for the durability date when buying non-packed meat (38% compared to 66% for pre-packed meat).

The second and the third most often indicated aspects are the price per kilogram and the price – 67% of EU consumers look for each of these aspects. The two aspects have been separated as the first one is designed to help consumers compare products they buy, whereas the latter is provided to inform consumers of how much they will finally pay for

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10 The "best before" date is the date of minimum durability of a food product. In case of highly perishable foods that are likely to constitute an immediate danger to human health even after a short period, the "best before" date should be replaced by "use by".
a product they choose. The results of the survey show that both are very important, in particular in the EU12, where 74% of consumers look for the price per kilogram (66% in EU15) and 70% look for the price (66% in EU15). Consumers seem to be only slightly more interested in the price aspects in the case of fresh meat than meat products, and there is no difference between non-packaged and pre-packaged meat.

The forth key information aspect is **the country of origin** (48% of EU consumers, without much difference between EU15 and EU12), followed by the name of the producer (44% for EU27, 40% for EU15 and 56% for EU12) and the ingredients (32% of EU consumers, without much difference between EU15 and EU12. Between a quarter and a fifth of consumers say they look for an origin certificate, an animal welfare certificate, nutritional values, an organic label or nutrition claims.

Only 12% of EU consumers say they look for information on whether meat is made from combined meat pieces, 12% look for environment/climate certificates and 8% for information on whether meat is from an animal slaughtered according to religious rites.
The information aspects consumers look for are to some extent consistent with their priorities at the moment of meat purchase. Survey respondents were asked to indicate the most and least important factors they take into account when they buy meat – figure 2. Some of these factors are linked with information, but not all of them. From the ones that consumers assess through information, the most important are the facts that the price is reasonable, the meat is produced in consumer's country and that the price is affordable. From the whole list of factors, the key priorities are freshness, taste and hygienic display, and consumers assess these on the basis of the look, the smell or the taste of the meat.
Consumers can only make well informed choices if the information they need is available to them. To assess whether the market provides consumers with adequate information, mystery shoppers (surveyors who pretend to be consumers and whose task is to replicate consumers' experiences) checked the availability of certain pieces of information on minced beef, pork cutlets, whole chicken and pork sausages sold in the EU. They found that the use by/best before date was available on 90% of meat they have assessed and the price per unit on 92% of meat. The country of origin is currently mandatory only for beef, but it was found on 86% of all meat assessed. On the other hand, for 13% of minced beef the mystery shoppers could not obtain the country of origin information.

Mystery shoppers found an organic label/information on 15% of the products assessed, an origin certificate (a quality certificate) on 40% of the products, nutritional value information on 44%, animal welfare information on 20%, and nutritional or health claims on 18%.

In general, information was more often available in hypermarkets and supermarkets than in butchers. Mystery shoppers, who not only checked labels but also asked staff at retailers, could not obtain the use by/best before date for 63% of products they assessed in butchers. The price per unit could not be gathered for 33%, and the country of

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11 Directive 2000/13/EC on the labelling, presentation and advertising of foodstuffs, does not require certain mandatory labelling on non-packaged foodstuffs and foodstuffs packaged on the sales premises. However, it requires that information is available to consumers.
origin for 26% of products checked in this retail channel. Interestingly, many consumers view butchers as the retailers they would prefer to go to.

**Information aspects that consumers look for are to some extent in line with the availability of relevant information in a consumer's country.** For example, consumers in Austria, Luxembourg and Denmark are more likely to look for organic certifications (38% of them say they use this information, compared with 18% on average in the EU), and these three countries have relatively high proportions of products with organic labelling: 24% in Denmark, 22% in Austria and 20% in Luxembourg. Greek consumers are more likely than the EU average to look for country of origin information (78% versus 48%), while Dutch consumers (24%) are less likely to do so. This matches the availability of country of origin labelling in these two countries: it could be found on 98% of products in Greece and on 47% of products in the Netherlands. Concerning Greece, it should be noted that there is national legislation requiring origin labelling.

The mystery shopping also revealed that some information aspects tend to be presented together. Examples include: an organic label was also present on 64% of minced beef sold with an environmental/climate certificate or a quality/origin certificate was also displayed on 71% of organic chicken.

**Sources of information**

Policy makers, but also producers and retailers, need to know which information sources or channels consumers use most for their meat purchases. These sources should be the ones deployed to pass the most important information aspects to consumers. Information sources that consumers use less often can still be adequate for passing particular items of information or types of messages, or to provide consumers with details.

According to the survey, **labels** are the key source of information for meat purchases (figure 3). The vast majority of consumers look at labels when they buy meat: 68% of EU consumers use labels on the packaging and 59% labels on the shelf/counter. More than half of consumers (56%) ask **staff at the retailer**. Consumers apparently turn to the staff when there is no package – 55% of consumers say they talk to staff when they buy non-packed meat, whereas only 21% do so when buying pre-packed meat. Differences between countries may be linked to cultural aspects as well as to the types of retailers consumers go to most often. EU12 consumers are more likely than EU15 consumers to ask retailer staff for information (63% in comparison to 54%) or talk to their family and friends (44% compared to 27%). On the other hand, EU15 consumers are more likely than EU12 consumers to look for information available from consumer organisations (16% versus 7%), NGOs (13% versus 6%) and the Internet (14% versus 9%).

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12 Directive 98/6/EC on price indication provides for a derogation for certain small retail businesses, which has been used by certain Member States to exempt small shops. However, this waiver was only allowed for a transitional period, to be determined by Member States. According to the Commission communication from 21 June 2006 on the implementation of Directive 98/6/EC, the Member States in general did not specify how long this transitional period would be.
On average, EU consumers use 3.6 sources of information, ranging from 4.6 in Austria to 2.2 in Portugal. There is a positive link, although not a strong one, between the number of information sources consumers use and their ability to indicate the right meaning of particular logos or claims (as described in the section on consumer understanding of information). Not surprisingly, consumers who on average use more information sources also look for more information aspects.

Overall, younger consumers, urban consumers and men are more likely than others to use a range of sources (labels, points of information in shops, Internet, producers, consumer organisations, NGOs, friends and family or newspapers and magazines). The main exception is staff at the retailer, which is mentioned more often by older consumers and rural consumers.

**Key considerations**

1. *Clear and effective provision of main information aspects*

The study shows that consumers are mostly interested in and use most often the durability date, price and price per kilogram. It concludes that the policy makers as well as the business operators should ensure that this information is available. Going further,
it can be added that these aspects of information should be easy to find and read on the package or obtain through other means, and should be provided in a way that would ensure the highest level of consumer understanding.

2. **Effective provision of information on the origin of meat**

The attention that consumers pay to the information on where the meat comes from, as well as their often limited ability and willingness to look for and understand different messages available on meat and meat products, leads to the conclusion that, when provided, this information aspect should be understandable and easy to find.

3. **Further enforcement and strengthening of the rules on food information relating to meat**

Mystery shoppers mostly found the mandatory information (price, date label and country of origin for beef) on the meat they assessed. However, there were still cases where they could not find this information. Relevant national authorities may thus conclude that more work is needed on enforcement of the food information rules which are currently in force.

Regulation (EU) No 1169/2011 on food information to consumers, which will enter into application on 13 December 2014, will render mandatory the indication of country of origin or place of provenance for unprocessed meat of pigs, poultry, sheep and goats. This provision is subject to the adoption of implementing acts by the Commission by 13 December 2013, which should consider, inter alia, the options for the modalities of expressing the country of origin or place of provenance of such meat with respect to each of the following determining points in the life of the animal: place of birth, place of rearing, and place of slaughter.

4. **Further enforcement of the price indication legislation**

According to the rules on price indication, the price per unit (kilogram) should be provided on products to enable consumers to compare prices of products sold in different quantities. In general, this information was available on almost all products assessed by mystery shoppers, but it was less often available in butchers. The study concludes that this might lead to differences in information provision for consumers shopping in different countries and different retail channels. On this basis, it seems important that Member States pay attention also to small retail businesses when enforcing the price indication legislation.

**Consumer understanding of information**

Information will only serve its purpose when it is properly understood by consumers. Information provided should enhance consumers' knowledge of an issue and not mislead them about the characteristics of the product. But since consumers are faced with many messages and issues, understanding this information should be made as easy as possible.

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13 OJ L 304, 22.11.2011, p. 18.
Labels and logos

The opinion survey showed that consumer ability to understand certain information is limited – see figures 4, 5 and 6. When asked about the meaning of the EU Protected Designation of Origin (PDO) logo, two in five consumers (42%) thought that the logo identifies a product that had been produced in the EU, and over a third (35%) answered ‘I do not know.’ Only 4% of consumers selected the correct answer, ‘the product has been produced, processed and prepared in a given geographical area’. Although "produced in the EU" is not an inaccurate statement in most cases (currently, the schemes are also open to products which originate or are manufactured outside the EU), the purpose of the logo is to pass to consumers the information about the exact meaning of the PDO scheme. According to the results of a recent Eurobarometer, 14% of consumers say they recognise the PDO and PGI logos on food (in general, not only on meat)\(^\text{14}\). This seems to show that the recognition of the PDO logo itself is higher than the knowledge of its meaning.

When asked about the meaning of a best before label, more than half of consumers (53%) thought that it is not safe to use the product (a sealed pack of dry sausage) after its best before date. A third (36%) of consumers selected the correct answer: ‘the meat will lose some of its quality but can still be consumed after the date if you store it in a fridge’. Consumers in EU12 countries seem to be particularly confused about the meaning of this label as they were more likely than those in EU15 to say that the product would not be safe to use after the best before date (71% compared to 48%). The proportion of correct answers was also higher among EU15 consumers than among EU12 consumers: 40% compared to 20%.

Food operators use nutrition claims not only to distinguish their products from others but also to inform consumers about specific characteristics of these products. Asked about the meaning of a ‘low fat’ label on a pack of ham, just under a quarter of EU consumers (23%) selected the correct answer: ‘less than 3% of fat’. The most common answer was ‘it has less fat than all other hams in the shop’ (29% of consumers), whereas 22% of consumers thought the product had less than 20% of fat and 17% answered ‘I do not know’. It seems that the purpose of this claim is partly achieved, i.e. consumers recognise that a low fat product might have less fat than other products in the shop or than average products of the same type. However, they do not necessarily become aware of the exact value of nutrients, to which the claim refers\(^\text{15}\).


\(^\text{15}\) The nutrition labelling is mandatory for foods which bear a health or nutrition claim, thus information on nutritional values is available to consumers on the label.
Figure 4: Understanding of the meaning of the Protected Designation of Origin logo

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

- The product has been produced in the EU
- The product conforms with relevant European legislation
- The product has been produced, processed and prepared in a given geographical area
- The product is organically farmed
- The product is a traditional specialty guaranteed
- At least one of the stages of production, processing or preparation takes place in a given geographical area
- The product presents better nutritional values
- I do not know

Source: Functioning of the meat market – Consumer Survey Data

Figure 5: Understanding of the meaning of the best before date

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

- It is not safe to use the product after the date
- The meat will lose some of its quality but can still be consumed after the date if you store it in a fridge
- It is safe to use the product after the date irrelevant of the way you store it
- I do not know

Source: Functioning of the meat market – Consumer Survey Data

Figure 6: Understanding of the meaning of ‘low fat’ claim

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

- It has less fat than all other hams in the shop
- It has less than 3% of fat
- It has less than 20% of fat
- It has less fat than other products, e.g. cheese or chips
- It is fat-free
- I do not know

Source: Functioning of the meat market – Consumer Survey Data
The above findings are in line with outcomes of the Consumer Empowerment survey, which showed that 41% of consumers did not know the meaning of the EU organic farming logo and only 34% were able to state its meaning correctly\(^\text{16}\).

As mentioned earlier, there is a link between knowledge of labelling and the information sources consumers use – although the correlation is less strong for the use by date and fat claim questions. The meaning of Protected Designation of Origin logo is known by 4% of consumers overall, but this figure is doubled for those who use the Internet and consumer organisations or NGOs as information sources.

The survey also shows that there is a link between knowledge of labelling and information aspects consumers look for. The proportion of consumers who correctly identified the meaning of the Protected Designation of Origin logo is higher than average among consumers who look for religious slaughter certifications and among consumers who look for environment or climate certifications (9% and 8% respectively). Overall, 36% of consumers correctly interpreted the meaning of the best before date, but this proportion is 43% among consumers who look for organic certifications and 40% among consumers who look for origin or environment/climate certifications. Overall, 23% of consumers understood the meaning of the low-fat claim, but this proportion is 28% among consumers who look for organic certifications and 27% among consumers who look for animal welfare certifications.

**Cues to assess quality and safety of meat**

Consumers choose meat not only based on information, but also on the look, the colour or the smell. Studies on these issues show that consumer perceptions often differ from more objective/scientific assessments. The cues consumers use to assess the quality of meat are not always the ones that scientists indicate as relevant or are not correctly interpreted by consumers. For example, consumers perceive a certain colour of meat as an indication of its freshness, whereas it is not proven by science that meat with this colour is fresher than with another colour. Also, consumers do not see the animal breed as a quality measure, whereas experts use it as an indicator.

**Key considerations**

5. **Easier access to information for consumers**

The study shows that the consumer understanding of logos and messages available on meat is limited and consumers are in general not very involved in gathering information on their meat purchases. This suggests that access to information should be facilitated and rendered as convenient as possible, for example, via online tools or smartphone applications. The Commission looks into recent technological developments while considering initiatives concerning provision of information to consumers. Also, in an effort to understand how voluntary food labelling schemes work for consumers, the Commission has launched a study, which might result in developing a database of voluntary schemes/logos and their explanations, available for consultation online. This could enable consumers to quickly and easily check the meaning of logos or labels.

\(^\text{16}\) Special Eurobarometer 342 on Consumer empowerment; April 2011; [http://ec.europa.eu/consumers/consumer_empowerment/index_en.htm](http://ec.europa.eu/consumers/consumer_empowerment/index_en.htm)
The Commission has also launched a behavioural study aimed at providing evidence of consumer understanding, attitudes and behavioural response to chosen food product information. Results of this study will inform the development of follow-up measures in the area of food information to consumers as foreseen in the Regulation (EU) No 1169/2011.

Taking a wider perspective, there could also be a role for comparative product tests in this respect, which are carried out by consumer associations and the results of which are available on the internet. These results, however, could benefit from a wider dissemination and promotion.

6. **Clearer durability date**

According to the study results, consumers seem confused about the meaning of the best before label. From this finding, it can be concluded that the wording and design of the information on the date of durability of meat should allow consumers to clearly and easily distinguish between the date after which the product is unsafe to eat or use and the date after which some of its qualities can change but it can still be consumed safely. This should reduce consumers' tendency to unnecessarily throw away meat or meat products which they can still consume. The Commission has clarified the meaning of date labels in its publication of ten tips to stop food waste\(^{17}\), and it also welcomes retailers' support in this area, which they announced in their issue paper presented at the Retail Forum for Sustainability annual event on 9 October 2012\(^ {18}\).

7. **Effective and easy to understand information on quality schemes**

The EU Protected Designation of Origin logo is helping farmers promote and protect names of quality agricultural products, and should also inform consumers about the specific character of the agricultural product. The low level of consumer understanding of the meaning of the PDO logo shows, however, that this second purpose is achieved only to a lesser extent. The reform of the EU Agricultural Promotion Policy is addressing this issue.

Following the general principle that the meaning of any quality or origin certification, whether subject to public or private schemes, should always be easily understandable for consumers, the Commission has recently launched a study to explore the use of voluntary food labelling schemes in general in the EU, their compliance with consumer protection legislation and with the Commission guidelines from 2010\(^{19}\), as well as to understand better consumer attitudes towards such labelling schemes.

8. **Better provision of information through staff at the retailer**

Staff at the retailer is an important information source and its role should not be underestimated. Moreover, trustworthy staff has a significant impact on consumer overall trust in the meat market\(^ {20}\). This leads to the conclusion that retailers should ensure that members of their staff are sufficiently trained and able to give consumers at least the

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most important information such as durability date, price, or origin of meat when required. Butchers in particular should pay more attention to providing information to consumers: they are perceived by many consumers as their preferred retailers, but consumers are not always able to find the key information. Consumers also have the right to be informed when they buy non-packed meat. Although at national level non-packed food may be exempted from a number of mandatory labelling requirements, information must still be available. As information on non-prepacked foods is mainly the responsibility of Member States, they should ensure that the rules on food information to consumers are implemented properly.

**Communication and education**

There are several channels for passing information about meat to consumers. As mentioned above, the majority of EU consumers look at labels, but they also ask staff at the retailer, talk to friends and family or look at information points in shops. To a lesser extent consumers use information sources such as producers, consumer organisations, newspapers, TV or Internet, NGOs or doctors. In addition, consumers might be influenced by media stories, as shown by Eurobarometer results. Because the role of particular information sources differs between countries, communication with consumers should be adapted to national conditions.

The analysis also shows that consumers who look for aspects such as animal welfare certificates, organic, environment/climate certificates, nutrition claims or nutrition values also more often use numerous information sources, such as Internet, producers, consumer organisations, NGOs, newspapers or TV programs. In particular, consumers who look for environmental information seem to be most active in terms of searching for information.

Finally, research shows that, in case of a food risk, consumers would have most confidence in information coming from doctors (31% of EU consumers would be very confident), family and friends (31%), consumer organisations (18%) and scientists (17%). For media, the proportion is 8%. Also, stakeholders point to the parties mentioned as important players to help improve the functioning of certain aspects of the meat market, but they also believe that other market players, such as the industry, retailers or the education system should be involved. **Education** could be particularly helpful in addressing some of the reasons for food waste.

Some of the stakeholders interviewed for the study pointed to the fact that the messages about the meat market passed to consumers by media are more often negative than positive, and that they rather do not focus on what has already been achieved in terms of safety. It was also mentioned in the interviews that **communication to consumers should involve all actors of the market**.

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21 Special Eurobarometer 238 on Risk Issues; February 2006; http://ec.europa.eu/food/food/resources/special-eurobarometer_riskissues20060206_en.pdf
Key considerations

9. Tailored communication to consumers

The results of the study point to often important differences between EU countries in consumer perceptions, levels of awareness, behaviour or satisfaction with particular aspects of the meat market. There are also differences between types of consumers and their motivations or attitudes. Hence, any communication activities regarding this market should take account of the real problems and be adapted to national conditions or specific audiences (e.g. in terms of age or place of living). Going beyond the strict focus of the study, it seems also important to pass the right messages through the right communication channels. A comprehensive communication and information strategy involving all actors of the meat market could help increase consumer trust in the market. This could also be achieved through conveying a positive message about the market, which would use the aspects that function relatively well in the meat market such as safety controls or freshness of products.

10. Targeted consumer education

As a general rule, consumer education should be well targeted in terms of audience and issues. An issue that could be addressed by adult or child education in the context of food is avoidance of waste through a better planning of shopping and cooking. The analysis shows that the most frequent reasons for wasting meat is non-optimal planning of purchases and cooking (see also section on sustainability).

Meat consumption and health

Consumers do not always have a clear view of the link between meat consumption and human health. On the one hand, they are told that meat is an important component of a healthy diet and has a high nutritional value. On the other hand, the image of meat is less positive in terms of fat content and its links with a number of health problems.

Survey results show that the impact of meat consumption on health is indeed important for consumers. Respondents were asked how satisfied they are with the impact meat has on health. The level of satisfaction with this aspect appears to influence significantly whether consumers are in general satisfied with the meat market or not. At the same time, EU consumers are not very satisfied with the impact of meat on health: only 36% are satisfied, 11% dissatisfied and 53% are neutral\textsuperscript{23}. While health was indicated by consumers as the main reason for which they would like to reduce their purchases of meat or meat products, only 21% of consumers look for information regarding nutritional values, e.g. fat, energy or salt content, and 18% look for nutrition claims when buying meat. Moreover, as mentioned before, consumer understanding of a health claim is rather low.

\textsuperscript{23} Respondents were asked to indicate their satisfaction level on a scale from 0 to 10 points. Satisfied ones include those who indicated 8-10 points, neutral 5-7 and dissatisfied 0-4.
Health- or nutrition-related messages are present on meat and some food operators reformulate their products to make them more appealing to health-conscious consumers. The mystery shopping showed that nutritional or health claims were present on 18% and nutritional value information on 44% of products that the mystery shoppers assessed. Still, only 35% of EU consumers indicated that they knew meat with nutrition claims, such as "low fat" or "Omega 3" (in comparison to 76% who know country of origin specified meat or 49% who know organic meat). In addition, only 15% of consumers said they buy this type of meat.

Although it is currently a niche market, the sales of meat with nutrition claims could grow in the future. 31% of EU consumers, which means twice as much as the current buyers, said they would like to buy such meat more often. As with other consumer intentions that are not directly translated into behaviour, the key obstacle seems to be the price.

**Key considerations**

11. *Easy to understand information on nutritional values*

The share of consumers who look for nutritional value information or for health claims on meat is rather low, as is consumer satisfaction with health aspects linked to the consumption of meat. Either consumers do not clearly understand the link between their health and the nutritional values provided by food, or their ability to act accordingly is limited. The study concludes that it is important to help consumers better understand the impact of meat consumption on health and to assist them with nutrition information in their decision-making. Information regarding nutritional aspects should therefore be made available in a way that would enable consumers to obtain and process it with minimum effort from their side. Regarding processed foods, Regulation 1169/2011 introduces mandatory nutrition labelling harmonising the content, expression and presentation of such information. With a view to improve consumer uptake and understanding, it may still be worthwhile for the market actors to further investigate the best and simplest additional ways to convey the message on nutrition characteristics of a meat product. For example, some food operators already developed graphic presentations of nutritional values and recommended daily intakes, which others might be interested to follow.

12. *Raising consumer awareness of the impact of meat on health*

Consumers to some extent perceive the impact of meat on health in a negative way (they are not satisfied with this aspect and also they would like to reduce their meat purchases for health reasons) but they do not often look for nutrition information or understand the meaning of a health claim. Although not stemming from the study directly, it appears important that business operators or public bodies further facilitate access to such information through additional ways, e.g. Internet. Finally, the EU, national authorities, national authorities,

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24 The new rules will apply as from December 2016 but food business operators who provide voluntarily nutrition information on their products will have to comply with the new rules, when providing such information, as from 13 December 2014. This should be coupled with consumer education to help consumers understand and use efficiently the information which is available on the food labels.
business operators, and civil society representatives should further work together on raising consumer awareness of and interest in nutritional values, including on recommended daily intakes, for example through initiatives such as the EU platform for action on diet, physical activity and health\(^\text{25}\) or the High Level Group on Nutrition and Physical Activity\(^\text{26}\).

Meat safety

The EU meat market belongs to the most regulated food markets and meat in the EU is among the safest in the world. In previous surveys\(^\text{27}\), 66% of EU consumers agreed that there are strict laws in the EU to make sure that food is safe and the majority of EU consumers (63%) thought that public authorities in the EU are quick to act when a danger to citizens’ health is identified. Although most consumers seem to be aware that there are adequate rules aimed at protecting them, between 30 and 40% are less convinced.

Perceptions and regulations

The consumer survey shows that only 41% of EU consumers are convinced that in their country appropriate measures are taken in case of a food risk related to meat, and also 41% are sure they always eat safe meat (figure 7). For both issues, almost half of consumers were rather neutral and between 11 and 13% were not convinced\(^\text{28}\). There are significant differences between countries, for example only 21% of Greek and as many as 62% of Finnish consumers think that in their country appropriate measures are taken when needed.

According to several stakeholders, consumers have little knowledge of how food safety is ensured and how controls are carried out. A comparison of results of the consumer survey with outcomes of official controls\(^\text{29}\) for a number of countries shows that consumers' perceptions of meat safety are not necessarily more negative in countries where the results of the official audit found a higher number of necessary improvements or these improvements referred to more significant shortcomings.

\(^{25}\) [http://ec.europa.eu/health/nutrition_physical_activity/platform/index_en.htm](http://ec.europa.eu/health/nutrition_physical_activity/platform/index_en.htm)

\(^{26}\) [http://ec.europa.eu/health/nutrition_physical_activity/high_level_group/index_en.htm](http://ec.europa.eu/health/nutrition_physical_activity/high_level_group/index_en.htm)


\(^{28}\) Respondents were asked to indicate on a scale from 0 to 10 points to what extent they agree with a statement that in their country appropriate measures are taken in case of a food risk related to meat. Convinced ones include those who indicated 8-10 points, neutral 5-7 and not convinced 0-4.

\(^{29}\) Reports from the 2009 Food Veterinary Office audit; [http://ec.europa.eu/food/fvo/country_profiles_en.cfm](http://ec.europa.eu/food/fvo/country_profiles_en.cfm)
Figure 7: Consumer perceptions of meat safety

| Q19. When you think about meat and meat products, to what extent do you agree with the following statements? |
|---|---|---|---|
| In my country appropriate measures are taken in case of a food risk related to meat | (0-4) Bottom | (5-7) Middle | (8-10) Top |
| 41% | 46% | 13% |
| I always eat safe meat | 41% | 48% | 11% |
| The public authorities adequately ensure the safety of meat in my country | 35% | 49% | 16% |
| Meat from the EU is safer than from outside of the EU | 32% | 48% | 20% |
| Producers and retailers adequately ensure meat safety standards | 32% | 52% | 16% |
| A media story on meat that might be unsafe changed my eating habits | 21% | 40% | 39% |

Source: Functioning of the meat market – Consumer Survey Data

Consumers' own role in ensuring meat safety

Desk research shows that consumers have low awareness of their own responsibility in ensuring meat safety. This was also highlighted as an issue by the EU-level stakeholders that were consulted for the study: few consumers realise that improper post-purchase handling could pose a risk to their health, e.g. through fresh meat making contact with other food products, which are intended to be consumed raw.

Key considerations

13. Further enforcement of rules and communication regarding safety of meat

Consumer perceptions regarding meat safety differ across the EU and in some countries many consumers are still not convinced that meat safety is ensured by public authorities or business operators. This points to a conclusion that effective implementation of safety rules in Member States should be further ensured. Although not directly covered in the study, experience of some Member States\(^\text{30}\) show that outcomes of safety controls (positive as well as negative) can be communicated to consumers as a means to increase market transparency, which could in turn increase consumer trust.

Bearing in mind that a food crisis will most probably have an impact on consumer perception, efforts should be pursued to have an optimal system in place, which reacts quickly in case of food crises linked to meat and which involves all relevant market players.

\(^{30}\) For example, in Belgium, restaurants and cafés display in a visible place an authorisation certificate issued by the federal agency for the safety of the food chain (l’Agence fédérale pour la Sécurité de la Chaîne alimentaire; http://www.afsca.be/bonasavoir/_documents/Aurestaurant-avec-photos.pdf). A similar system works in Denmark.
Stakeholders interviewed for the study also stressed that consumers do not always recognise the importance of safely handling meat. Member States or individual schools could consider including this issue in their consumer education programmes.

**Specific meat types**

Sufficient choice of products is one of prerequisites for consumer welfare. The meat market can offer consumers choice in terms of different animal species from which the meat originates, in terms of particular producers or brands, or in terms of characteristics of products. Marketing of meat with specific characteristics has significant implications for producers and retailers (e.g. a necessity to comply with rules governing particular quality) as well as for consumers (e.g. in terms of price of meat). In the study, specific meat types are defined as those that are different from regular meat, i.e. are marketed with some specific information or as having specific qualities. The following types are distinguished: meat for which the country of origin is specified, animal welfare certified meat, meat from animals slaughtered according to religious rites, organic meat, environment/climate certified meat, origin certified meat (with an origin/quality certificate) or meat with nutrition claims.

Consumers were asked to indicate which specific types they know, from a list of types of meat. Figure 8 shows that consumer awareness differs across types and between countries. The best known is meat for which the country of origin is specified: on average in the EU 76% of consumers know this type of meat. The second best known is origin certified meat (meat with quality certifications referring to its origin, e.g. Certified Irish Aberdeen Angus Beef or Liptovský salám31), which 55% of consumers know. Consumer awareness of specific meat types often goes in line with their priorities and the information aspects they look for. The origin of meat (meat produced in consumer's country or with a traceable origin) is one of the top priorities for EU consumers and one of the information aspects they look for. Almost half of consumers know organic meat, 44% know animal welfare certified meat, 35% meat with nutrition claims, 25% meat from animals slaughtered according to religious rites and 15% environment/climate certified meat. 11% of consumers admitted they do not know any of the specific types. In general, awareness is higher in the EU15 than in the EU12 countries.

Whether consumers know about a particular type of meat does not implicate that they purchase it, although differences in the levels of purchases of particular meat types reflect to some extent differences in awareness levels. On average in the EU, 60% of consumers say they purchase meat for which the country of origin is specified, 32% buy origin certified, 16% organic, 22% animal welfare certified, 15% meat with nutrition claims, 4% meat from animals slaughtered according to religious rites and 5% environment/climate certified meat. One in ten consumers admitted they do not buy any of the specific types. The biggest gap between consumer awareness and purchases can be observed for organic meat and for meat from animals slaughtered according to religious rites. Similar to awareness levels, the purchase levels are higher in EU15 than in EU12 countries. The differences are smaller for origin certified meat (33% for EU15 vs. 29% for EU12) or meat with nutrition claims (16% vs. 14%). On the other hand, the differences are bigger for meat for which the country of origin is specified (63% for

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31 Respondents were presented with country-specific examples of quality certifications referring to origin.
EU15 vs. 50% for EU12), organic (18% vs. 8%) or animal welfare certified meat (24% vs. 13%).

Figure 8: Awareness and purchase of specific types of meat

<table>
<thead>
<tr>
<th>Q2: Which of the following types of meat and meat products do you know?</th>
<th>Q3: And which of the following types of meat and meat products have you purchased in the past month?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meat for which the country of origin is specified</td>
<td>Awareness</td>
</tr>
<tr>
<td>Origin certified</td>
<td>76%</td>
</tr>
<tr>
<td>Organic</td>
<td>55%</td>
</tr>
<tr>
<td>Animal welfare certified</td>
<td>44%</td>
</tr>
<tr>
<td>Meat with nutrition claims on better nutritional values</td>
<td>35%</td>
</tr>
<tr>
<td>Slaughtered according to religious rites</td>
<td>25%</td>
</tr>
<tr>
<td>Environment/climate certified</td>
<td>15%</td>
</tr>
<tr>
<td>None of these</td>
<td>11%</td>
</tr>
<tr>
<td>At least one type</td>
<td>90%</td>
</tr>
</tbody>
</table>

Source: Functioning of the meat market - Consumer Survey Data Based on all respondents (N=13477)

Not surprisingly, awareness matches to some extent the level of availability of specific meat types in particular countries. In general, mystery shoppers could find specific types of meat more often in countries where consumers more often said they knew and purchased these types. In total, 52% of products assessed by mystery shoppers were regular meat, 28% origin certified, 12% organic, 5% animal welfare certified and 1% with an environmental/climate certificate. These shares differed between product categories, between countries as well as between sales channels (figure 9 presents cross-channel differences at the EU level).
Figure 9: *Share of product types among the products assessed - by sales channel*

**Minced beef**

<table>
<thead>
<tr>
<th>Sales Channel</th>
<th>Market/Farm</th>
<th>Dig厂家</th>
<th>Convenience Store</th>
<th>Supermarket</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market/Farm</td>
<td>67%</td>
<td>12%</td>
<td>8%</td>
<td>12%</td>
</tr>
<tr>
<td>Dig厂家</td>
<td>6%</td>
<td>12%</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>Convenience Store</td>
<td>7%</td>
<td>12%</td>
<td>17%</td>
<td>12%</td>
</tr>
<tr>
<td>Supermarket</td>
<td>7%</td>
<td>12%</td>
<td>17%</td>
<td>12%</td>
</tr>
</tbody>
</table>

**Pork sausages**

<table>
<thead>
<tr>
<th>Sales Channel</th>
<th>Market/Farm</th>
<th>Dig厂家</th>
<th>Convenience Store</th>
<th>Supermarket</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market/Farm</td>
<td>67%</td>
<td>12%</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>Dig厂家</td>
<td>6%</td>
<td>12%</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>Convenience Store</td>
<td>7%</td>
<td>12%</td>
<td>17%</td>
<td>12%</td>
</tr>
<tr>
<td>Supermarket</td>
<td>7%</td>
<td>12%</td>
<td>17%</td>
<td>12%</td>
</tr>
</tbody>
</table>

**Whole chicken**

<table>
<thead>
<tr>
<th>Sales Channel</th>
<th>Market/Farm</th>
<th>Dig厂家</th>
<th>Convenience Store</th>
<th>Supermarket</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market/Farm</td>
<td>69%</td>
<td>12%</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>Dig厂家</td>
<td>6%</td>
<td>12%</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>Convenience Store</td>
<td>7%</td>
<td>12%</td>
<td>17%</td>
<td>12%</td>
</tr>
<tr>
<td>Supermarket</td>
<td>7%</td>
<td>12%</td>
<td>17%</td>
<td>12%</td>
</tr>
</tbody>
</table>

**Pork cutlets**

<table>
<thead>
<tr>
<th>Sales Channel</th>
<th>Market/Farm</th>
<th>Dig厂家</th>
<th>Convenience Store</th>
<th>Supermarket</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market/Farm</td>
<td>72%</td>
<td>12%</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>Dig厂家</td>
<td>6%</td>
<td>12%</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>Convenience Store</td>
<td>71%</td>
<td>12%</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>Supermarket</td>
<td>60%</td>
<td>12%</td>
<td>7%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Legend:
- Market/Farm
- Dig厂家
- Convenience Store
- Supermarket
- Discount Store
- Other
Availability of specific types does not only differ between countries but also between meat categories (i.e. minced beef, pork cutlets, whole chicken and pork sausages). More organic products were found for minced beef and whole chicken than for other categories. More origin certified products were found for pork sausages and whole chicken, and the highest proportion of animal welfare certified meat was found in the whole chicken category. Hypermarkets, supermarkets and discount shops offered a wider range of products than butchers, market/farms or convenient stores. For minced beef, 50% of this category assessed in supermarkets belonged to a specific type (was marketed as non-regular), but in butchers the share was 31%; for pork sausages, 46% of this category in supermarkets was marketed as a specific type, whereas in butchers the share was 33%; for whole chicken these shares were 57% (in supermarkets) and 38% (in butchers); and for pork cutlets 40% and 28% respectively.

**Gap between consumer intentions and behaviour**

The vast majority of EU consumers indicate that they would like to buy at least one of the specific types of meat more often, which means that there is a gap between consumer intentions and their current behaviour. In general, the widest gaps can be observed for organic meat (41% of EU consumers said they would like to buy this type more often whereas only 16% buy it now), and for environment/climate certified meat (39% intend to buy it more often and 5% buy it now).

There are different reasons for consumers for not purchasing what they, according to their declarations, would choose. The main obstacle seems to be a **too high price**: this reason was indicated by 57% of those who would like to buy organic meat more often, 39% for origin certified, and 37% for animal welfare certified meat. **Insufficient choice of a particular meat type at the retailer** is another important reason: it is indicated by 27% of consumers who would like to buy origin certified meat more often, 26% for meat from a particular country, and 25% for meat with nutrition claims. **Unavailability of the type at the retailer** is a third reason: 25% of EU consumers who would like to buy animal welfare certified meat more often chose this reason, 24% for environment/climate certified and 20% for organic meat. Lack of information is important with respect to meat from animals slaughtered according to religious rites, as 35% of consumers willing to buy it more often indicated **that they are not sufficiently well informed**. Consumers perceive insufficient information also as an obstacle to buying environment/climate certified, animal welfare certified meat and meat with nutrition claims more often (34%, 28% and 28% respectively).

Consumers do not seem to be very suspicious about the trustworthiness of certificates. For almost all meat types, not more than 15% of EU consumers who would like to change their purchasing patterns indicated that they **do not trust the certification schemes**. The proportion is only higher (21%) for meat from animals slaughtered according to religious rites. This points to the importance of ensuring that certification schemes present in the market are reliable.

Although availability varies between countries, specific types may not be as readily available as consumers would like. Consumers wanting to change their purchasing patterns towards specific meat types say they often cannot find them in shops. Mystery shoppers also had difficulties finding products marketed as non-regular. Not surprisingly, consumers are also not very satisfied with the availability of specific meat types.
Although they are quite satisfied with the availability of meat in general (58% of EU consumers give a score between 8 and 10 on a 0-10 scale), they are less so with availability of specific types: 44% of EU consumers are satisfied with the availability of meat produced in their country, 24% are satisfied with the availability of organic meat (25% dissatisfied\(^{32}\)), 20% are satisfied with the availability of animal welfare certified meat (30% dissatisfied) and 18% are satisfied with the availability of environment/climate certified meat (32% dissatisfied). Satisfaction with these elements is also lower than satisfaction with hygienic conditions, freshness and taste.

### Price differences between regular and specific meat types

Prices collected by mystery shoppers show large variations between the average prices of regular meat and the prices of sustainable (organic and environment/climate certified products), animal welfare friendly, and origin/quality certified meat. At EU-level, specific types of products are more expensive than regular products, but in a number of countries, certain specific types were cheaper than regular meat, particularly animal welfare certified and origin certified meat.

Figure 10 shows that, at EU27 level, **organic meat is the most expensive specific type of meat** (66% more expensive than regular meat), followed by **animal welfare certified** meat (20% more expensive than regular meat) and **origin certified** meat (19% more expensive than regular meat). Due to the limited availability of some meat types in some countries, it is not possible to compare prices at national level for all Member States, and even for the Member States where such products could be assessed the sample bases are rather small. Bearing this in mind, the largest differences between the price of organic and regular meat were found in the Czech Republic and Greece (81% for both) and Germany (75%), and the smallest differences in Italy (2%) and Sweden (33%). In Romania, on the other hand, organic meat was 12% cheaper than regular meat. The difference between origin certified meat and regular meat was 68% in Estonia, 64% in Portugal and 35% in Slovenia. In Romania and Bulgaria on the other hand, this type was 20% cheaper than regular meat and in Malta it was 8% cheaper.

![Figure 10: Average meat prices by type – indexed on regular meat prices](image)

Consumer perceptions regarding prices of specific meat types as being too high seem to be in line with the actual prices. This is particularly true for organic meat, for which the gap between consumer intentions and purchases is wide and the main obstacle to purchase it more often is its price.

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\(^{32}\) Dissatisfied respondents are those who indicated 0-4 points on a 0-10 scale.
Key considerations

14. Easy to identify and understand organic logo

The fact that a considerable share of consumers would like to buy organic meat more often indicates the potential of this market. At the same time, the level of awareness and understanding of the old EU organic logo was low. To promote organic farming, the Commission has prepared information material to help consumers recognise organic products easily, explaining what organic farming is, and how it contributes to the protection of natural resources, to biodiversity or animal welfare. Using the material prepared, the meaning of the organic farming logo could be even wider communicated, possibly through additional tools or information channels. Increasing awareness of organic meat should also include a clear indication of specific characteristics of organic foods, of what can be and what cannot be expected from such products.

15. Development of sales of organic meat

Consumers say they wish to buy organic meat more often. These stated consumer preferences suggest that lower, more affordable prices could make this type of meat more attractive. Increased transparency of price formation may also help consumers in their choices. Suppliers, retailers, and national and European price observatories have a role to play in this respect.

16. Better information on animal welfare certified meat

Consumers who would like to buy animal welfare certified meat more often said that they do not feel sufficiently informed about this issue. As stated in the European Union Strategy for the Protection and Welfare of Animals 2012-2015, it is important to ensure that consumers are aware of the EU legislation applicable to food producing animals and that they are not deceived by misleading animal welfare claims. The Commission intends to map the Member States' animal welfare education and information activities targeted at consumers. Evidence regarding consumer expectations and actual behaviour collected through this study on the meat market will add to the Commission's further work on consumer information.

17. Better environment/climate certificates for meat

Consumer awareness of meat with an environment/climate certificate is low and consumers rarely purchase it. Still, if information on the environmental impact of meat production is provided, the right measure of this impact should be identified and communicated to consumers clearly and coherently. Consumers need to understand how their choices impact the environment or the climate and need guarantees that environmental claims are reliable. Through the food sustainable consumption and production round table, as well as via the Multi-stakeholder Dialogue on Environmental

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33 http://ec.europa.eu/agriculture/organic/home_en
34 The Commission's organic farming website already addresses a number of such considerations in its 'true or false' section.
Claims, the Commission works with a dedicated group of stakeholders on assessment methodologies, on communication tools, and on how to address misleading environmental claims and help consumers make considered green choices. The Commission has also launched a study exploring the functioning of environmental claims on non-food products, which might provide information that could also be used in the context of food.

**Country of origin of meat**

Following the BSE crisis, indicating the origin of beef and beef products became mandatory in 2000. EU legislation requires the indication of country of birth, fattening and slaughter or one origin where all three above-mentioned stages of the life of an animal took place in one country. This information is available through the traceability system put in place. Many producers and retailers also voluntarily indicate the country of origin for other categories of fresh meat, for example, for chicken meat or pork.

The recent regulation on food information to consumers requires that the country of origin or place of provenance for unprocessed meat of pigs, poultry, sheep and goats will be indicated as from 13 December 2014. Currently, the Commission is preparing implementing acts regarding rules for this provision, which, according to the Commission Action Plan on horsemeat, will be adopted by December 2013. The regulation also requires a report from the Commission by 13 December 2013 regarding a possible mandatory indication of origin or place of provenance of meat used as an ingredient (according to the Commission Action Plan on horsemeat, this report will be adopted in the autumn 2013), and a report by 13 December 2014 regarding a possible mandatory indication of the country of origin or place of provenance of types of meat other than beef, swine, goat, sheep and poultry.

Legislation regarding the indication of the country of origin of meat seems to correspond to consumer expectations. As described in the section on consumer information, the country of origin is the forth information aspect EU consumers look for when they buy meat (48% of consumers indicated it). For fresh meat purchases, 45% of consumers use this information whereas for meat products the share is slightly lower at 38%. EU consumers are also very aware of meat for which the country of origin is specified: 76% know it and 60% purchase such meat.

The importance of the country of origin is strongly linked with whether the meat originates from the consumer's own country. The survey showed that consumers find it important whether or not the meat is produced in their country: this is the fifth consumer priority when choosing the meat, after freshness, taste, hygienic display and a reasonable price – figure 2. The survey showed also that 44% of consumers are satisfied with the availability of meat produced in their country (13% are dissatisfied and 43% are rather neutral). According to the analysis of the consumer satisfaction results, the level of satisfaction with the availability of meat produced in a consumer's country is among the attributes that contribute most to consumers' general satisfaction and also dissatisfaction, so any changes in the availability of this type of meat can lead to significant changes in the level of satisfaction or dissatisfaction of consumers.
Mystery shoppers found the country of origin information on 86% of meat they assessed. At the time of the survey, from the four categories checked, indicating the country of origin was mandatory only for minced beef. However, the country of origin was found on 87% of minced beef assessed (about the same as on other meat categories).

**Sustainability**

Sustainability of meat can be viewed from the perspective of production processes – more sustainable production processes can improve the quality of the environment, or are at least less harmful. It can also be linked to whether meat is organic or not, as the organic production has a lower impact on natural resources from an environmental perspective. Sustainability can also be linked to specific ethical concerns, such as welfare of animals from which meat is produced. Finally, meat consumption itself, and in particular its significant growth, may contribute to deteriorating the environment. Moreover, many consumers have unclear perceptions of sustainable food products, for example they believe that organic meat is healthier, more nutritious and tastes better, none of which are proven.

One of the principles of sustainable consumption is reduction of food waste. Consumer choices or behaviour contribute to wasting food. Firstly, a demand for a wide choice of differentiated products may pose a risk that not all variants are sold in time, which creates a challenge for waste management at the retail level. Secondly, households themselves produce food waste. This section provides additional insights about waste generated by consumers throwing away meat and how consumer understanding of the best before label impacts on waste, and about consumers' willingness to reduce their meat purchases.

**Waste generated by consumers throwing away meat**

Households are responsible for 42% of wasted food in the EU (60% of which is avoidable)\(^3^6\). Food waste does not only have an important impact on the environment but it also causes measurable financial losses to consumers. The consumer survey results show that around a quarter (23%) of EU consumers threw away edible parts of meat or meat products in the month before the survey. EU15 consumers were more likely than EU12 consumers to have done so (25% compared to 16%). On average, consumers say they threw away meat 3.5 times in the past month with young respondents (aged 18-34) more likely to waste meat than other age groups (32% reporting waste, compared to 23% among 35-54 year-olds and 15% among 55-75 year-olds). The financial loss reported by consumers who wasted meat in the month before the survey is on average 9 EUR (per month). Although per consumer (or household) this does not seem much, at EU-level, this sum rises to over 360 million EUR\(^3^7\) per month.

To be able to reduce food waste, the reasons behind it should be known and understood. Consumers most frequently indicated that the meat was over its use by/best before date (45% of those who reported meat waste). A third of those who threw away meat

\(^{36}\) BIO IS Preparatory Study on Food Waste across EU 27, October 2010

http://ec.europa.eu/environment/eussd/reports.htm

\(^{37}\) Calculated with an assumption that each respondent represents one household.
said they prepared or cooked too much (35%), 30% purchased too much, and 29% did not trust the taste, the look or the smell of the meat. Consumers' limited understanding of the meaning of the best before label (related to quality) and the fact that some see it as an indication of the time after which it is unsafe to consume a product, may contribute to unnecessary throwing away of edible food. The findings also indicate that to some extent consumers do not plan their shopping or cooking optimally, and might show indirectly that consumers may not always be aware of the right portion size per person.

Willingness of consumers to reduce their meat purchases

On a global scale, a very high consumption of animal products (including meat) indirectly has a negative impact on the environment as the livestock sector contributes to environmental problems\(^{38}\). Figure 11 presents relevant results of the survey: **32% of EU consumers said they would like to buy meat less often**, however environmental reasons were mentioned by only 16% of them and ethical reasons also by 16% (this might result from the fact that most consumers may be unaware of the scale of the environmental impact of the meat production). Those who would like to reduce their meat consumption are mainly motivated by health reasons (indicated by 54%), financial aspects (34% said that meat is too expensive) and concerns about meat safety (21%). Figure 12 shows that there are significant differences between countries: as much as 50% of Czech consumers and only 11% of Bulgarians would like to buy meat less often.

Figure 11: *Reasons for willingness to buy meat less often*

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**Source:** Functioning of the meat market – Consumer Survey Data

**Base:** All who want to buy meat less often (4247)

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\(^{38}\) ‘Livestock's long shadow’ report by FAO, 2006, [http://www.fao.org/docrep/010/a0701e/a0701e00.HTM](http://www.fao.org/docrep/010/a0701e/a0701e00.HTM)
18. Addressing reasons for food waste

Many consumers take the best before date - which is related to quality - as an indication of the time until which a meat product can be consumed safely and therefore throw away a safe product after expiry of the best before date. Consumer confusion with the meaning of the best before label may be a reason for consumers throwing away safe and edible foodstuffs. Clarifying the date label could contribute to decreasing food waste, as could education regarding planning of purchases and cooking of meals.

These issues are among those addressed in the Commission's "10 tips to reduce food waste" published on a dedicated food waste website, which also includes a video clip on food waste, a sheet to clarify the meaning of “best before” and “use by” date labels in all EU languages, a user-friendly compilation of good practices on food waste reduction initiatives and a food waste library.

In general, the Commission is identifying actions with an EU added value to

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39 10 tips published in all EU languages;
40 http://ec.europa.eu/food/food/sustainability/index_en.htm
complement the wide range of initiatives carried out at national and local level, and is therefore consulting relevant stakeholders, Member States and experts on how to minimise food waste without compromising food safety. To this end, the Commission set up a Working Group on Food Losses/Food Waste under the Advisory Group on the Food Chain, Animal and Plant Health to discuss how to reduce food losses and food waste and to exchange views on possible actions at EU level\footnote{The Working Group consists of stakeholders from the whole food supply chain. The meetings on 5/10/2012 and 8/2/2013 were attended by nearly 60 stakeholders. The last meeting focussed on specific topics such as obstacles in donation of surplus food to food banks, misunderstandings of date labelling (best before/use by), legal barriers in the feed sector, added value of the short food supply chains, food waste in the fruit and vegetable sector, development of the EU bio-energy policy related to food waste prevention, etc.}.

Food waste is planned to be a key chapter in the "Communication on Sustainable Food" that the Commission is preparing and that is due for adoption by the end of 2013. A public consultation is planned to be launched.

**GMO-free feed**

Almost one in five (17\%) survey respondent said they look for information about whether the animal was fed with GMO-free feed – which is only slightly less than for organic (18\%) or nutrition claims (also 18\%). Some consumers attach particular importance to whether meat they choose is from animals not fed with genetically modified feed. In some countries, mainly in Cyprus, Italy, Greece and Austria, consumers rank this aspect higher than the EU average, which is 7\% among 17 items surveyed – figure 2.

**Key considerations**

19. Better information on meat originating from animals fed with GMO-free feed

The study shows that whether meat originates from animals fed with GMO-free feed is also among the items considered by consumers. The Commission has commissioned a study to draw on the state of play of these labels in the EU, and assess whether regulatory harmonisation would be needed in this field, in particular as regards consumer information.

**Meat from animals slaughtered according to religious rites**

A quarter of consumers said they knew meat from animals slaughtered according to religious rites (for example Halal or Kosher) and 4\% said that they buy it. The highest shares are in the UK and France: 49\% of the British consumers know it and 10\% buy it, in France the shares are 40\% and 11\% respectively. Awareness is also quite high in Sweden, Denmark and Belgium (45\%, 40\% and 37\% respectively). At the other end of the scale, only 3\% of Romanian, 4\% of Cypriot and 4\% of Estonian consumers know this type of meat, and meat from animals slaughtered according to religious rites is hardly
ever or not at all purchased in those countries. Asked about their intentions, 18% of EU consumers surveyed stated that they would like to buy meat from animals slaughtered according to religious rites more often. On the average in the EU, 8% of consumers look for information on religious slaughter when they buy meat.

### Key considerations

**20. Better information on the stunning of animals**

The market for meat originating from animals slaughtered according to religious rites is rather small in terms of consumer awareness, purchases, or interest in information in general. However, through an upcoming study\(^{42}\), the Commission is further investigating the possibility of harmonised labelling of the stunning of animals.

### Structure of the meat market in terms of consumer purchases

The vast majority (88%) of EU27 consumers bought pre-packaged meat or meat products in the past month, and 75% bought non-packaged meat or meat products. Respondents from EU15 countries are more likely to have purchased pre-packaged meat (89% compared to 71% for non-packaged meat), while EU12 respondents are more likely to have purchased non-packaged meat (92% compared to 83% for pre-packaged meat). These differences can be linked to some extent to retail channels consumers use: consumers who use supermarkets or equivalent retailers as their main retailer are more likely to have bought pre-packaged meat in the past month and these channels are in general more used in EU15.

**Chicken** is the most commonly purchased fresh meat (89% of EU consumers bought it), then **pork** (79% of consumers), further **beef** (67% of consumers), **turkey** (43%), **veal** (36%) and **lamb** (26%). There are significant differences between Member States, in particular as regards purchases of beef, veal and lamb, which are more common in Southern and Western Europe. The frequency of meat consumption also varies across the EU: on average 43% of consumers eat meat or meat products 4 or more times per week, 40% in EU15 and 55% in EU12 countries. Consumers eat meat products more often than fresh meat.

Two in five EU consumers buy meat or meat products mainly in **supermarkets**, 25% from **butchers**, 18% in **hypermarkets**, 7% in **grocery or convenience stores**, 6% in **discount stores**, 2% from **farms** and 2% point to **markets** as their main retailer. Their main retailers are not always the retailers consumers would prefer to buy meat from: 39% of consumers buy mainly in a retail channel that is different from their preferred one. Regardless of their current main retailer, 36% of consumers would rather buy from butchers, 28% in supermarkets, 13% in hypermarkets, 7% from farms, 7% in grocery/convenience stores, 6% in discount stores and 4% from outdoor markets – figure 13.

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\(^{42}\) An on-going Commission's study on the opportunity to provide EU consumers with the relevant information on the stunning of animals
Asked why they did not shop mainly with their preferred retailer, over a third (36%) of consumers mentioned high prices as a reason, 32% said they are able to do all of their shopping in one go at their main retailer, and 31% said that their preferred retailer is too far away. However, when looking at all retail channels consumers use, it appears that many consumers have access to their preferred retailer, but may not visit it as often as they would like.

Figure 13: Main and preferred 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?

<table>
<thead>
<tr>
<th>Retail Channel</th>
<th>Main Retailer</th>
<th>Preferred Retailer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarket</td>
<td>40%</td>
<td>28%</td>
</tr>
<tr>
<td>Butcher</td>
<td>25%</td>
<td>36%</td>
</tr>
<tr>
<td>Hypermarket</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td>Grocery/Convenience store</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Discount store</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Directly from a farm</td>
<td>2%</td>
<td>7%</td>
</tr>
<tr>
<td>Outdoor market</td>
<td>2%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: Functioning of the meat market – Consumer Survey Data

Based on all respondents (N=13477)
Price differences in the EU and affordability of meat

According to an analysis of Eurostat data, three groups of countries can be distinguished based on their meat price level\(^43\): high price countries (Germany, Belgium, Luxembourg, France, Italy, Austria, the Netherlands, the UK, Ireland, Denmark, Sweden and Finland), medium price countries (Spain, Portugal, Malta, Greece and Cyprus) and low price countries (Bulgaria, Romania, Slovakia, the Czech Republic, Poland, Hungary, Lithuania, Latvia and Estonia). Price differences between the Member States are mostly in line with differences in the general economic situation as represented by the comparative consumer price level, and are not linked to the retail concentration.

The price of meat (price in general as well as price per kilogram) is a key information aspect, just after the durability date, which consumers look for when they buy meat. Although, in general, prices of meat are correlated with the level of consumer consumption per country, the survey shows that only 20% of EU consumers are satisfied with the price of meat in their country. The least satisfied are consumers in Estonia, Slovakia, Bulgaria, Lithuania, Hungary and Latvia (between 5 and 8% of consumers).

Consumers who said that they had difficulties paying their bills in the past 12 months at least from time to time are more likely to say that meat is too expensive when asked why they would like to reduce their meat purchases (43% compared to 26% of consumers who did not report financial difficulties). This may indicate that this group of consumers cannot easily afford meat.

Key considerations

21. Further monitoring of the market

The analysis of meat prices in Members States did not show that a higher concentration in retail is linked with higher prices in a given country. However, other observations show that the level of concentration is growing and thus the competition in the retail market should further be monitored at the EU and Member State level. Monitoring should cover issues such as consumer prices, choice of products or retailers, as well as innovation available to consumers. Moreover, monitoring of price levels and developments in the EU, including further analysis of price formation in particular food supply chains (covering also meat), has already contributed to increasing market transparency and should be continued in the frame of the European Food Prices Monitoring Tool\(^44\) or national price observatories.

Conclusions

According to the study, consumers, in general, focus on a limited number of information aspects and show a low level of understanding of certain messages available on meat or meat products. A possible conclusion to be drawn from these findings is that business

\(^{43}\) Slovenia was not included in the analysis due to unavailability of data.

\(^{44}\) http://epp.eurostat.ec.europa.eu/portal/page/portal/hicp/methodology/prices_data_for_market_monitoring

http://ec.europa.eu/enterprise/sectors/food/competitiveness/prices_monitoring_en.htm
operators as well as policy makers should ensure that the key information elements, such as the durability date, the price or the origin (when required or when given voluntarily), are provided to consumers in a clear and understandable way. In addition, the most accessible communication means should be used. Market players should also ensure that the rules on mandatory information requirements are consistently enforced in all retail channels where meat and meat products are sold.

To improve consumer understanding of information, provision of details and explanations could be helpful, through additional means, such as the Internet or information in stores. A number of initiatives can be useful, such as, for example, the development of a database of voluntary labelling schemes, clarifications of the meaning of the durability date (which some retailers intend to offer to their customers), better training of retailers' staff on provision of information, or clear and easy to understand nutrition information following the applicable rules.

Consumers' understanding can also be enhanced through (adult and child) education, which could focus on issues such as safe handling of meat at home, indicators of quality of meat, characteristics of organic meat, impact of meat consumption on health, role of nutritional values of foodstuffs, prevention of food waste, climate issues or sustainable consumption in general.

The day-to-day provision of information and consumer education should be targeted, tailored to specific audiences, and it should involve all actors of the meat market. This should also apply to communication action when food crises occur. A comprehensive communication and information strategy, as well as conveying a positive message highlighting the aspects of the market that function well, can help increase consumer trust in the meat market. Within this framework, the Commission will further work with Member States and other stakeholders to ensure that relevant rules are implemented and enforced. To better inform the implementation processes and policy making in general, the Commission will continue gathering evidence on aspects such as consumer behaviour, the functioning of food labelling schemes, consumer demand for information on the stunning of animals, or price formation along the food supply chains.