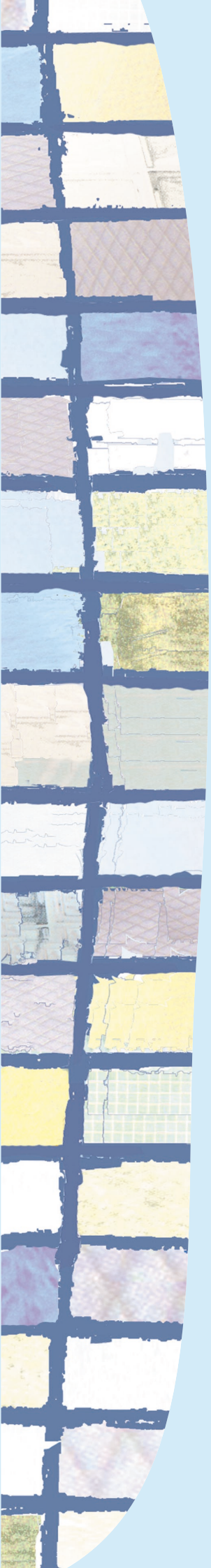

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Hanne Torjusen, Lotte Sangstad,
Katherine O'Doherty Jensen and Unni Kjærnes

European Consumers' Conceptions of Organic Food:

A Review of Available Research

KVL

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Summary

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European Consumers' Conceptions of Organic Food:

A Review of Available Research

By

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2004

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Preface

This report is the first publication from the project entitled: *Recommendations for Improved Procedures for Securing Consumer Oriented Food Safety and Quality of Certified Organic Foods from a Consumer Perspective,* with the acronym *Organic HACCP*. The Organic HACCP project is supported by the European Commission, Fifth Framework Programme, Quality of Life and Management of Living Resources (contract no. QLRT-2002-02245). Dr. Kirsten Brandt[1] is responsible for coordinating the project. Scientific Officer at the European Commission is Mr. Antonio diGiulio.

This report is the result of Work Package 1, which has been conducted by two of the Partner Institutes in the project: The Royal Veterinary and Agricultural University (KVL), Denmark; and the National Institute for Consumer Research (SIFO), Norway. Dr. Katherine O'Doherty Jensen at KVL has been responsible for the Work Package. The report is written by Lotte Sangstad and Katherine O'Doherty Jensen at KVL and Hanne Torjusen and Unni Kjærnes at SIFO.

The final report is the result of close cooperation between the four authors. However, contributions can be described as follows: Hanne Torjusen has been responsible for editing the report. She is the main author of Chapters 5, 7 and 8 as well as the first drafts of Chapter 2. Lotte Sangstad is the main author of Chapters 4 and 6, and she has written the first drafts of Chapters 1 and 3. Katherine O'Doherty Jensen is the main author of Chapter 9 and has contributed extensively to several others. Unni Kjærnes has contributed to the final version of several parts of the report, particularly Chapter 2.

The report has been presented and discussed at two project meetings, including one workshop with the active participation of invited guests representing most major stakeholder groups. Comments and suggestions have been implemented in the report. We thank project partners and workshop participants for their contribution. However, the authors take full responsibility for the contents of this report.

Oslo, March 2004

NATIONAL INSTITUTE FOR CONSUMER RESEARCH

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Summary

The review of consumer literature presented in this report regards consumer expectations and concerns with respect to organic foods. This report is the first publication from the project entitled: *Recommendations for Improved Procedures for Securing Consumer Oriented Food Safety and Quality of Certified Organic Foods from a Consumer Perspective* (*Organic HACCP*). Its objective is to employ the concept and methods of HACCP in a description of production, processing and distribution of organic foods in Europe, to be followed by an assessment of the extent to which these are organised in ways that accord with the expectations and concerns of consumers. The project seeks to take some of the first steps towards the development of measures that will secure improvements of the quality and safety of organic foods in Europe in the longer term. It sets out to do this in a way that will satisfy people at the end of these commodity chains - those who consume organic foods.

The review of consumer literature presented here can be regarded as an essential but preliminary step to be taken in pursuit of the more general aims of the *Organic HACCP* project. It examines existing literature with a view to identifying consumer expectations, criteria and concerns with 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.

Part I of this report presents objectives and methods, as well as an overview of major approaches to consumer studies. *Part II* reviews consumer research with regard to four European countries. *Part III* summarises the conclusions of these consumer studies and discusses the bearing of these on the *Organic HACCP* project as a whole.

Chapter 1 outlines the aims and research questions of this report:

- To review the existing literature on consumer concerns about organic food products
- To gain a better understanding of issues of safety and quality as these are seen from consumer points of view
- To identify relevant focal points for future studies aiming to provide a deeper understanding of the concerns underlying consumer preferences for organic food products.

Our work has been guided by the following specific research questions:

- On the basis of existing studies, what can be said about the criteria European consumer use in their assessments of the quality and safety of organic food products?
- To what extent do we find differences and similarities between different European countries?
- What approaches are currently employed in the identification of consumer criteria, and what are their strengths and weaknesses?
- What perspectives are needed, and what factors would one need to include in studies of organic consumption, if these are to deliver guidelines for use in a system of organic HACCP?

In *Chapter 2*, we present a brief overview of some ways in which the study of food is approached in consumer research, exemplified with references to relevant empirical studies. Two main types of studies conducted in relation to consumers and organic food are those within a cognitive and behavioural framework on the one hand, and those with social scientific approaches on the other.

Cognitive approaches emphasise constructs dealing with mental structures and thinking processes, often focussed upon characteristics of consumer knowledge, perceptions of products, and experienced needs to be satisfied. Many studies referring to organic food have been designed to measure consumer 'willingness to pay', frequently combined with that of distinguishing market segments.

A social scientific perspective on food focuses on social relationships from social, cultural, institutional and political perspectives. This may concern questions of politics and economy, as related for example to the distribution of food - including kinds of shopping outlets. It may also concern questions of 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 concepts 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 action and the manner in which everyday activities are embedded in interpersonal relationships and institutional patterns.

Chapter 3 presents some of the factors that exert influence on organic consumption and on the ways in which consumers perceive organic foods. In conducting this review, we found it necessary to select a small number of European countries that differed from each other on a number of significant points. Among the main factors in this respect are agricultural production – in general as well as organic; regulation, labelling and market communication; and distribution. Our four selected case-countries are *Denmark*, *the United Kingdom*, *Italy* and *Hungary*.

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 considerable 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 establishment of certification procedures. The organic sector in Denmark, however, is considerably larger in relative terms and the levels 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 constitutes a good example of a liberal market, according to 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 supplies from British farmers and growers, such that at least one third of the supply has relied 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, also a member of EU, 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 has been selected as an example

of countries belonging to the central and eastern region of Europe and as yet 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 and no Hungarian organic label, as such.

The outcomes of the country reviews with regard to consumer perceptions and priorities are presented in *Chapters 4-7*.

With regard to eating quality, similar parameters are employed by *Danish consumers* in their assessments of organic and conventional foods. Some 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 effects of production on processing, the environment, animal welfare, human health/quality of life, as well as 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 being emphasised, including 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 marketing research and academic studies. There seems to be a relatively broad knowledge of organic food among UK consumers, many of them having encountered it in supermarkets. It appears that there is more research done in some areas as opposed to others, and there are also indications that there are regional differences in the use of and possibly attitudes towards organic food. Some British consumers perceive organic food as tasting better, or they associate organic food with a 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 the third world producer countries; equity among people involved in the food chain or who are affected by the use of natural resources. Issues of animal welfare (for example in terms of natural rearing and humane slaughtering) and environmental protection are also included in the ethical concerns related to organic food. Perceptions of environmental soundness of organic agriculture are often related to the key features of organic production methods without the use of chemical pesticides and fertilizers. Information must come from credible sources, and claims from manufacturers about own products are seen as less credible. Many want information about the origin of the food (country, region, local); the origin of food ingredients in processed food (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. To many, organic food represents local sourcing and is therefore 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. The remarks 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 prioritise the appearance of products, thus indicating that they use other quality measurements apart from appearance when it comes to evaluating food. Health is important to the majority of the 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 view origin of the food as a proxy for qual-

ity. Animal welfare as an issue is absent in the reviewed studies. With regard to safety, worry is expressed in regard mainly 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 a label. 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" figures is a central theme in several studies. The research we have examined was undertaken mainly for the purpose of exploring market potential, 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 some of the demographic tendencies. These reflect methodological problems in the studies.

Based on the very limited literature available from *Hungary*, only very tentative suggestions may be made. The low availability of organic food in the domestic market is a major point. This must be kept in mind when considering results indicating "lack of demand" as a hindrance to development of the domestic market – although some acknowledgement of consumers' limited purchasing power was given as well. Particularly in such contexts, it is crucial not to overlook the factors framing 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 nature of market development and the degree of "consumer-orientation" in agriculture. With regard to quality aspects emphasised by consumers buying organic food, the few available studies indicate that health is currently a main focus among consumers. There is, moreover, reference to a general view that agriculture is not associated with environmental pollution.

In *Chapter 8*, the findings from the four case-countries are combined in an overview of the trends in Europe, based on the available literature. The review suggests that understanding consumers' relation to organic food is a potentially complex task in which many different aspects might need to be considered.

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, often related to the main differences between conventional and organic practices. 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" and "natural" appear to pick out, and express a preference for, food that has been produced with little or no use of artificial fertilizers, pesticides, food additives and technologies like genetic manipulation. The review thus shows that consumer concern about food quality and safety embraces broad and interconnecting concerns. Health, environmental concern, ethics, authenticity and taste, and 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. A typical rationale is that healthy soils, plants and animals are a basis for 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 concerns about energy expenditure in the food system in general as well as the use of natural resources.

There is a consistent finding that the consumer's choice of organic food is related to some kind of health concern, but there are large gaps in our knowledge of how, and in what contexts, consumers relate organic food to the various aspects of health. 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 the buying of organic foods for health reasons is frequently referred to in the literature. Organic food is empirically related to several types of "food scare" and 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 provides for 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.

Ethical considerations relate to a wide range of issues and are often reported to be 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 you serve food can all be seen as ethical concerns. Ethics may also be linked to religious faith, which, through directives of what should be eaten and what should not, may constitute a reason for eating organic food.

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 contents 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 of product quality 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. The review indicates that consumer attitudes to the quality of organic food vary between countries and in different contexts. We need a more thorough understanding of this.

However, the choice of organic food may also be understood as having less specific reasons, 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 in 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. We cannot, within the frames of routinised everyday life, manage to be confronted with this plurality in the form of acts of choice. 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.

It is possible to observe two distinct trends in organic distribution and consumption: on the one hand, there is a "normalisation" in which organic food is incorporated into mainstream, standardised, high-volume distribution. On the other hand, there is what is typically called the "purist" line or "niche" approach. Here, qualities perceived as organic are sought throughout the food chain, and decentralised, small-scale distribution and handcraft style food processing are also sought. These two tendencies are subject to dispute 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 consumer preferences. 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 standardised food system. On the other hand, high availability and low prices are examples of consumer demands, which might more easily be fulfilled through a "mainstreaming" approach.

There are considerable differences across Europe in how the food system is organised, and there are also cultural differences in the role of food in society and everyday life. Such differ-

ences 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, and there are indications that there is variation in this field.

Clear and simple labelling of organic food is important to consumers. At the same time, many consumers want more in-depth information about the food and the food system than a label normally allows. This seems to be a paradox. However, both wishes can be met through diversified information strategies. Lack of information and knowledge is likely to have a bearing on the way in which organic food is perceived and consumer reaction to information about various issues, as well as different kinds of information approaches. Moreover, trust in labels and various sources of information emerge, in the review, as important consumer issues related to organic food. In this respect, perceptions of the 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.

Information about organic certification is important to consumers, and there is evidence of some confusion on this point. Variations among European countries with regard to systems of certification and number of labels in the market are likely to be important for how consumers view and experience food products. 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 "bits of information" from regulations and codes of practice to a broader understanding of the contexts they relate to. Thus the issue of availability of information must be seen in connection with knowledge about food and food system issues among consumers.

One might argue that organic food – certified and labelled – already in itself provides more food system information to the consumers than is normally the case with conventional food. But the organic food system is generally subject 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, those choosing this as an alternative to conventional foods, include many critical, knowledgeable consumers whose information demands may be particularly high. Nevertheless the issue of information within organic food systems needs to be further addressed. The exploration of an "organic HACCP" approach is desirable in this context. One answer could be simple labels with clear and explicit references to the certification rules and to more detailed information about the background, enforcement etc.

Finally, in *Chapter 9*, recommendations for future research are made.

General recommendations regard the following needs:

- To incorporate a much *wider range of substantive issues* in consumer research with regard to organic foods and in reviews of the literature in this field
- To treat *consumer characteristics* in this field *as dependent variables* calling for explanation
- To undertake *more research regarding* the consumption of organic foods in *central, eastern and southern regions* of Europe

Specific recommendations regard the need for future research to address the following issues:

- 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

With regard to research methodology it is recommended that:

- Future consumer research should employ a variety of methods of data collection and analysis, ideally planned such that *quantitative* and *qualitative* methods supplement each other

1 Objectives and Methods

1.1 HACCP - the model of the project

In recent years it has become common practice to implement systems of quality monitoring and quality assurance in food production. One such system is HACCP (Hazard Analysis of Critical Control Points), which is now implemented in EU food legislation (Marsden, Flynn and Harrison 2000:20; Jouve 1994). It has been found that the identification and monitoring of critical control points in food production can make very significant contributions to improving food safety (Nestle 2003).

The review of consumer literature presented in this report regards consumer expectations and concerns with respect to organic foods. This is the starting point of a larger EU project entitled: *Recommendations for Improved Procedures for Securing Consumer Oriented Food Safety and Quality of Certified Organic Foods from a Consumer Perspective*. The project as a whole is referred to by its brief acronym: '*Organic HACCP*'. Its objective is to employ the concept and methods of HACCP in a description of production, processing and distribution of organic foods in Europe, to be followed by an assessment of the extent to which these are organised in ways that accord with the expectations and concerns of consumers. It is envisaged that some recommendations can be made to producers, processors, distributors and/or regulators in so far as their current practices fail to meet consumer expectations. Likewise consumers may benefit from information regarding options that present themselves at various stages of commodity chains. The project as a whole thus seeks to take some of the first steps towards the development of measures that will secure improvements of the quality and safety of organic foods in Europe in the longer term. It sets out to do this in a way that will satisfy people at the end of these commodity chains - those who consume organic foods.

Organic HACCP will undertake data collection with regard to a range of commodity chains. Analysis will then detect critical control points (weak spots) in these chains, which will in turn constitute the foci of recommendations. Some recommendations will be designed to prevent potential hazards of production, processing, distribution or marketing. Some will be designed to secure and protect the benefits of organic products.

At this early stage, our project does not aim to facilitate the implementation of a system of regulation as such, merely to provide some well-grounded recommendations on procedures and control - such that operators throughout the food system will be better enabled to ensure that consumers' expectations are met.

1.2 Objectives

In this light, the review of consumer literature presented here can be regarded as an essential but preliminary step to be taken in pursuit of the more general aims of the *Organic HACCP* project. It examines existing literature with a view to identifying consumer expectations, criteria and concerns with respect to the quality and safety of organic foods. Its results will then be employed as guidelines in the assessment of current practices and the development of new measures. An important task of this review will be to point out limitations of the existing research. Where required insights into consumer concerns are lacking at present, we hope to offer specific suggestions regarding the directions that future studies in this field might take.

The aims of this review can thus be summarised as follows:

- To review the existing literature on consumer concerns about organic food products
- To gain a better understanding of issues of safety and quality as these are seen from consumer points of view
- To identify relevant focal points for future studies aiming to provide a deeper understanding of the concerns underlying consumer preferences for organic food products.

Our work has been guided by the following specific research questions:

- On the basis of existing studies, what can be said about the criteria European consumer use in their assessments of the quality and safety of organic food products?
- To what extent do we find differences and similarities between different European countries?

Our previous acquaintance with the literature led us to expect that the prospects of our finding detailed information on organic consumption of the kind required by the *Organic HACCP* project would be limited. We therefore allowed ourselves be guided by two additional questions:

- What approaches are currently employed in the identification of consumer criteria, and what are their strengths and weaknesses?
- What perspectives are needed, and what factors would one need to include in studies of organic consumption, if these are to deliver guidelines for use in a system of organic HACCP?

1.3 Method

Sources

The bibliographical search was undertaken using bibliographical databases, specialised research databases and relevant websites on organic issues. The bibliographical databases were accessed via research libraries in Copenhagen (KVL, Royal Library, Copenhagen Business School), in Oslo (SIFO) and on websites. Searches were conducted in different databases related to the subject from The Dialog Corporation and ISI Web of Science. They included general databases Science Citation Index Expanded, Social Science Citation Index, Arts & Humanities Citation Index and more specific databases including Sociological Abstracts, International Bibliography of the Social Sciences (1981-2000), PsycINFO 2000, Geography 1997/12-2002/11, FSTA Current 1990-2003/01, Food Science and Technology Abstracts, and International Political Science.

The research databases used were Cordis (EU research activities), The Danish National Research Database, MAPP (Centre for Research on Customer Relations in the Food Sector,

Aarhus School of Business), CBS (Copenhagen Business School), and SIFO (National Institute for Consumer Research, Oslo). Among the most used websites were: http://organic-research.com and http://www.organic-europe-net.

From the start, searches were primarily made using the key words "organic-foods", "consumer" and derivations of these. Searches were limited to research undertaken after 1994, the main reason for this being the need to keep the workload within the timeframe of the project. But it also seemed to us that 1995 onwards constituted a reasonable choice as a starting point. We could expect that as from 1995 to date, there would be at least some studies on organic consumption in most European countries. In many countries, organic consumption had barely begun at the beginning of the 1990s.

In order to find as much material as possible and to obtain an overall idea of what was actually available, we set no restrictions on language in initial searches. Later, having selected material for review, we confined ourselves to literature published in English, Nordic or German languages.

The outcome of the bibliographical search

The outcome of the literature sweep comprised approximately 400 titles, of which approximately half were subsequently reviewed. Selection of the articles for review was first and foremost based on the selection of four countries as foci for the study: Denmark, the United Kingdom, Italy and Hungary. These four countries serve as cases, each of which represents a profile of the organic sector with regard to particular features — e.g. the scale of production, magnitude of imports and exports, and dominating type of distribution of organic food. The criteria upon which we elected to study these four countries are described in Chapter 4. Note that studies from other European countries are included in this review to a limited extent in order to assess the situation in Europe as a whole.

A final parameter that should be mentioned is that, when we speak of the consumption of organic foods, we confine ourselves to personal purchases and/or food consumption in private households. This means that studies of the purchasing of organic food products by caterers, restaurants and other institutions, as well as by food processors, are not included in this study.

Besides these factors – the choice of language, the choice of countries, and the narrow interpretation of the term "consumption" – no further limitations were placed on our selection of relevant literature. This means that all the studies dealing specifically with consumer preferences and concerns with regard to organic foods were included. Knowing that the material was limited, and wanting to locate as many studies as possible, we included studies regardless of their methodological quality. Indeed, part of the task was to evaluate the relevance and the results of these studies.

Types of studies

Studies undertaken specifically to illuminate consumer preferences with regard to organic foods are dominated by market research. Many of these studies have shortcomings, i.e. samples are very small, deal with single organic products or just a few aspects of consumer choice. This reduces both their validity and their external reliability, and does not permit generalization and comparison of findings. Besides the literature with specific regard to consumer preferences and concerns, we have therefore included literature on other aspects of food consumption when this was relevant to our aims. This research deals with consumer understanding of food quality and confidence in food. We have also included some more general sociological theory in discussing the strengths and limitations of the studies reviewed.

The material on which this review is based can be categorized in a threefold manner:

a) Market-oriented studies of consumer preferences and purchasing behaviour with respect to organic food
b) Other studies of consumer concerns relating to organic food
c) Other studies of food consumption in general and of consumers' understanding of quality and safety

1.4 Structure of the Report

Part I of this report includes the following chapter (Chapter 2), which presents various approaches to consumer studies and discusses the strengths and weaknesses of these.

Part II comprises an introductory chapter (Chapter 3) as well as chapters reviewing consumer research with regard to each of the four countries selected for the purpose of this review. In Chapter 3, we present some of the factors that exert influence on organic consumption and on the ways in which consumers perceive organic foods. We also present the reasons for selecting four cases, showing how each case represents a different profile with regard to contextual or background factors. Chapters 4 – 7 present a review of the literature with respect to each case taken up in turn.

In Part III we summarise the conclusions of these consumer studies and discuss the bearing of these on the *Organic HACCP* project as a whole. Chapter 8 summarises the main concrete results of these consumer studies. Chapter 9 provides suggestions with regard to future research, pointing out areas of inquiry we have found to be inadequately explored as yet for the purpose of furthering the aims of the *Organic HACCP* project.

2 Approaches to Consumer Studies

In this chapter we present a brief overview of some ways in which the study of food is approached in consumer research, exemplified with references to relevant empirical studies. Consumer research today constitutes a multi-disciplinary field, characterised by a variety of approaches. Concepts and models from most social science disciplines are drawn upon and its methods include a wide range of both qualitative and quantitative techniques of data collection and analysis. Like other fields of social research, consumer research encompasses a variety of assumptions about the character of social reality. Whether or not these assumptions are explicitly expressed, they always tend to make their mark on the kind of results obtained and the conclusions drawn. The purpose of distinguishing some few disciplinary frameworks and their characteristic methods and issues of investigation here is that this chapter should serve as an introduction to the presentation of literature reviewed in subsequent chapters. It must be emphasised that this chapter cannot give a comprehensive overview of all relevant approaches and methods. The aim is rather to focus – quite selectively - on some important features of and distinctions between dominant contributions to the study of the consumption of organic food.

Considering the questions posed in this report, a rough distinction is made between two dominant disciplinary approaches. On the one hand is a range of studies characterised by a behavioural focus in which concepts and frames of reference are largely drawn from cognitive and social psychology. On the other hand are studies that seek to apply a range of social and sociological frames of reference, and which tend to focus on the meaning of actions and on factors that influence such actions rather than on that of behaviour as such. Because of its impact on empirical research with regard to organic food, the particular application of cognitive and behavioural frames in marketing research will be emphasised here. As we shall see, these two types of approach entail some differences in methodology as well as different substantive issues and research questions.

It should be noted that many techniques of data collection are shared by both approaches. These include representative surveys designed with a view to quantitative analysis, as well as various kinds of qualitative data collection such as in-depth interviews, group interviews (focus groups) and observation methods. Other methods, however, are mainly found in only one or the other of these approaches. Experimental design and laddering analysis, for example, are commonly used in cognitive and behavioural studies, while ethnographic methods and institutional analysis tend to be exclusively employed in social scientific studies. However, even analyses undertaken with similar methods of data collection can be very different in significant respects. For example, demands on sample size and methods of sample selection can diverge considerably for surveys designed within each of these approaches. This, in turn, has important implications for the conclusions that can legitimately be drawn from empirical data.

2.1 Cognitive and behavioural frameworks

2.1.1 Cognitive and economic approaches

One approach that has dominated research related to consumers' attitudes and behaviour with respect to environmental issues, includes numerous studies in which the underlying premise is that if consumers are given enough information about environmental problems, their acquired awareness will lead to the adoption of environmentally friendly behaviour (for example: Grünert and Kristensen 1992; Thøgersen 1998; see also Halkier 1998). Regarding the mechanisms leading from problem-perception or attitudes to behaviour, one can distinguish between different approaches. From an educational perspective, one approach focuses upon the role of pedagogy in acquiring information and knowledge, and in the development of personal involvement with particular issues. Some psychologists emphasise the role of value-orientations underlying cognitive or more general psychological structures, while others focus on the role of beliefs or attitudes (Finger 1994). Some social psychologists focus on intention as the factor that best predicts behaviour (Fischbein and Ajzen 1975; Ajzen and Fishbein 1980). Ajzen and Fishbein have identified attitudes as one of the key factors, which affect consumers purchasing behaviour. Their model incorporates beliefs, attitudes and behavioural intention, and by using specific equations they aim to reveal the manner in which these are related to each other. Ajzen (1985) has later emphasised the role of perceived behavioural control, i.e. how easy or difficult the accomplishment of a given behaviour is perceived to be. The Fishbein and Ajzen model has been widely used in studies of food choice and purchasing behaviour (Bonfield 1974, Shepherd and Stockley 1985, Shepherd and Farleigh 1986).

Organic food has been studied not only in association with environmental concerns external to the individual consumer, but also within the framework of 'risk perception', including food safety concerns as well as concerns with the environmental impacts of food. According to Henson and Northen (2000:97), much of the literature on consumer perceptions of risks associated with food has focussed on the attitudes and beliefs underlying consumer concerns, the factors that make some risks more "acceptable" than others, as well as trust in different sources of information[2]. Slovic (1987, 2000) has characterised risk perception by means of a series of polar concepts, including such dimensions as the extent to which risks are perceived to be 'voluntary vs. involuntary', 'controllable vs. non-controllable', 'natural chemicals vs. manmade chemicals', etc. Consumer perceptions of risk are often investigated along these dimensions. Other examples of approaches based on psychological theory aim to better understand key determinants of perceived food safety risks, or to develop 'mental models' of how consumers reach their assessments of risk associated with pesticide exposure versus other categories of food hazard (see, for example: Williams and Hammitt 2001). Another typical approach within the consumer behaviour and marketing literature is the use of the 'perceived quality risk framework'[3] (Henson and Northen 2000).

Much of the research regarding consumers' understanding of food risk has been based on what has become known as 'the knowledge deficit model'[4]. Hansen and colleagues (2003) summarise the basic assumptions of this model in the following terms: First, that subject to acceptable levels of risk, the optimisation of productivity is a commonly shared value in modern societies. Second, that acceptable levels of risk associated with optimal productivity

[2] Some references to typical studies with this approach mentioned by Henson and Northen (2000) are: Fischoff *et al*. 1981; Slovic 1987; Krimsky & Golding 1992; Sparks & Shepherd 1994; Frewer & Shepherd 1994; Adams 1995.

[3] Examples in Henson and Northen (2000) are: Bauer 1967; Cunningham 1967; Bettman 1973; Grünert 1978; Steenkamp 1989. Some studies focus on the role of observable characteristics as risk indicators (Cox 1967, Locander & Hermann 1979).

[4] Also referred to as "the knowledge gap" or "cognitive deficit" (Hansen *et al*. manus. 2003)

are universally, or at least widely, agreed upon. Third, that scientific knowledge is the most effective, and hence desirable, basis on which to improve both the production of goods and the control of risk, and that therefore scientific evidence should be the primary guide in risk management. Fourth and last, that if the public does not comply with the advice and recommendations of scientific experts, this is because they have poor understanding of the scientific reasoning informing that advice, i.e. the problem of lacking public consensus is due to a 'knowledge deficit' among consumers' (Hansen *et al*. 2003).

Hansen *et al*. (2003) have reviewed an extensive amount of published work on attitudes to food risks, and they identify many shortcomings of studies based on the 'knowledge deficit' model. They conclude that progress in the understanding of consumers' perception of food risks and safety will not be achieved while risk theorists continue to adopt the assumptions of the deficit model. This is also the same conclusion that has emerged in many of the papers they have reviewed. They suggest that an interdisciplinary, contextualised approach to risk, which includes psychological, sociological and ethnographic input, seems to be a fruitful way forward:

> "*... if we are to build a complete picture of consumer attitudes toward food safety, we will need a broad understanding of the symbolic meanings that attach to different types of food, the circumstances in which it is bought and consumed, and the wider societal context in which its production and consumption takes place*." (Hansen *et al.* 2003).

A similar rejection of the assumptions of the deficit model has been put forward in another recent contribution to the study of food safety issues. Nestle (2003) distinguishes between science-based estimates of food risk and value-based assessments of the acceptability of risks. Questions regarding the latter in her view involve a range of moral and political issues, in which the views of scientists are no more qualified than those of ordinary citizens in their role as consumers.

Cognitive approaches as we have seen emphasise constructs dealing with mental structures and thinking processes, often focussed upon characteristics of consumer knowledge, perceptions of products, and experienced needs to be satisfied (Zanoli 2002:644; Grunert *et al*. MAPP). A behavioural dimension is not always included in these approaches, but when it is, the focus is usually upon purchasing behaviour. Without any attempt to cover this wide field, we will mention one concept that has played a central role in studies of purchasing decisions and behaviour with regard to organic food.

Many studies have been designed to measure consumer 'willingness to pay', most often motivated by the aim of estimating the market potential for organic foods at premium prices. This task has frequently been combined with that of distinguishing market segments. In these studies, 'willingness to pay' is employed as a measure of the relationship between declared values and the price one is willing to pay for products associated with those values. Demand, which is the technical term in economics, is a focal point. However, several factors that can influence demand/"willingness to pay" are often left out of account. These include: the type of products in question, the relative quality of products at issue, the volume of the particular product consumed, the social contexts in which the product is used (weekday/weekend etc.), the social context in which shopping takes place (Miller 1998), as well as the economic resources of the buyer (Økologisk landsforening 2002:16). Examples of studies of organic food, in which 'willingness to pay' has been in focus, are the Danish studies undertaken by Grünert and Kristensen (1992) and Hansen and Sørensen (1993). These studies examined the priority accorded to environmental concerns in competition with other consumer considerations, and how the willingness to search and pay for products from environmentally sound production varied between different consumer segments.

The social psychological focus on 'risk' and the economic focus on 'willingness to pay' should be seen as complementary approaches. In most cases they share basic assumptions about the character of consumption, understood as constituting unit acts of (more or less ra-

tional) individual decision-makers, based on underlying values, attitudes and beliefs, as well as on informational input.

2.1.2 Market research

Market research is an applied discipline, its disciplinary foundations and conceptual frameworks being largely drawn from cognitive and social psychology and consumer economics.[5] But the special focus on marketing is often reflected in methodologies and concepts that are specific to this field of application. The objective of market research is to function as an aid to commercial decision-making. This objective dictates which data are relevant, which in turn influences the selection of methods of data collection and of methods of analysis to which data are typically subjected, as well as the form in which results are submitted to those whose work requires their use.

Consumers constitute the market in the sense that without them there would be no transactions.The term consumer can be understood as referring to a situation-specific social role closely linked to acts of consuming, whereby everybody is a consumer part of the time, while nobody is a consumer all of the time (Lien 1995:137). According to Lien, there are basically two ways in which the consumer becomes visible to marketing professionals: either by means of their purchasing activities, which are recorded as registered sales, or by means of their their verbal responses to questions posed in consumer oriented market research (Lien 1995:138).

Market research is almost invariably conducted in response to a particular client's need for specific kinds of information, to solve a problem, or to inform strategic decision-making (Gofton 1998, 304). By definition, good primary market research should not produce generalities. Primary market research data are gathered in the vast majority of cases for the specific needs of particular clients. For this reason, when using market research data for any other purpose, such as that of secondary analysis, one has to take the specific objectives of such studies into consideration. This entails recognition of the fact that the data involved are diverse, that specific and different research questions have been posed (or not posed, as the case may be) and that the results of many studies cannot easily be compared or collated.

The conceptual framework refers, in many cases implicitly, to the types of cognitive and behavioural approaches outlined above, focusing on the pre-purchase decision-making processes of individuals and the character of intention to purchase or actual purchases made.

2.1.3 Methodologies in market studies

Consumer oriented research of the kinds mentioned above draw upon several methods of data collection and analysis, ranging from sophisticated statistical analyses of quantitative survey data to purely qualitative descriptions of consumer attitudes as expressed in group discussions. Cognitive and behavioural studies of food and consumption represent a very wide and diverse field. In the following, we will concentrate on methodologies usually employed in market research with specific reference to the consumption of organic food.

Many studies are based on quantitative data. Market studies may vary considerably with regard to the degree of analysis involved (Lien 1995:140). Some research reports simply

[5] This discussion is limited to applied research in commercial settings. The academic discipline of marketing research (some of the studies already mentioned belong here) shares some of the features mentioned here with regard to its focus on pre-purchase decision-making and purchasing behaviour, for example, but does not share the aim of serving as a direct basis for marketing decisions.

present analyses of empirical data without offering any consideration of contexts that might be relevant to the interpretation of results (for example økofoods/Beckmann *et al.* 2001 in Denmark). Frequently, no critical reflections are offered on how particular values or kinds of attitudes are defined, distinguished or operationalised. Likewise, such studies do not contribute much to any deeper understanding of such key concepts as 'quality' or 'health'. Some publications do include theoretical considerations (for example MAPP in Denmark). Several quantitative studies focus mainly on technical issues in relation to the development of tools for quantitative measures of concepts (for example Thøgersen 1998).

Some surveys are specifically designed to describe current and/or potential target groups for certain products, while others are more general, seeking to describe basic values, life-style characteristics and purchasing paterns of various segments of the population. Consumer segmentation differs from traditional sociological research in that behaviour is seen as being closely connected to identity and life-style (Lien 1994:51). Based on a set of questions, considered as being apropriate for the operationalisation of a wide range of predefined variables, the results of segmentation analyis present correlations between these variables. Two continuous variables (for example 'modern-traditional orientation') are selected as representing underlying dimensions and treated as constituting a vertical and a horizontal axis respectively for the purpose of imposing order on a complex set of data. Results can then be presented as visual maps, illustrating the location of specific variables relative to these underlying dimensions. Results can also be presented in the more readily accessable form of qualitative descriptions of the characteristics of "typical" consumers within any given segment. One theoretical presupposition of such operalisations is that values are causally related to behaviour (Lien 1995:142). Segmentation analysis describes how certain values tend to appear together, but it does not tell us anything about causal relationships between any given value and the behaviour of any particular target group.

Another method in frequent use is that of "laddering", which reflects existing discourse on the issues investigated, since it is based on the analysis what is brought up in the course of an interview and what is then elaborated by the respondent. This means that values, preferences, etc. tend to be treated in a contextual manner rather than as constituting inner cognitive features. Social contextuality is not, however, always included in cognitive choice research (an example of this is Zanoli *et al*. 2001).

Qualitative approaches in applied research include the use of individual and group interviews as well as observation methods. Group interviews, or focus groups, have been frequently employed in recent years. The groups participating in such discussions are not representative, but may provide valuable qualitative data regarding different ways of thinking about issues, different product conceptions or reactions to advertisments, etc. The quality of these studies is highly dependent upon the exclusion and inclusion criteria according to which participants are recruited, the quality of the interview schedule and the frames of reference employed in analysis. Many such commercially oriented studies are undertaken for the use of private clients and are not publically accessible. Some studies are published, however, particularly those in which group discussions have been designed to provide qualitative data that can supplement the results of survey data.

2.2 Social scientific approaches

2.2.1 Some important perspectives in social scientific consumer research

Understanding the consumption of food from social scientific perspectives implies taking account of the social and cultural contexts in which people think about, buy, prepare, eat and

dispose of food products. A social scientific perspective on food focuses on social relationships from social, cultural, institutional and political perspectives (Mennell, Murcott and van Otterloo 1992). This may concern questions of politics and economy, as related for example to the distribution of food - including kinds of shopping outlets. It may also concern questions of 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.

Food is a meeting point of numerous symbolic codes: personal, familial, cultural, biological, industrial and environmental, as well as ethical dimensions of social justice (James 1993). It follows that organic food can also be understood in relation to such codes. Some studies are of an ethnographic character (Lien 1995, Døving 2003). A common feature of these approaches is a focus upon the *meanings* we connect with material products (Campbell 1987; Douglas 1975, 1982). This does not imply that the utilitarian values of products in use are overlooked, but rather an acknowledgement that there is something more than practical or instrumental values related to these products (Lien 1995; Holm and Kildevang 1996).

Sociological and anthropological studies of food and food choices have pointed out – among other issues – that consumers tend to conceive eating as a moral matter (Douglas 1966; Stein and Nemeroff 1995, Germov and Williams 1996; O'Doherty Jensen and Schiøler 1996). Food purchase, cooking and eating are activities deeply embedded in the normative structures and routines of everyday life. Food is not only a form of meaningful communication, it is also a commodity that consumers pay for, as well as being a necessity of life. Buying food therefore is an everyday activity, which constitutes a connection between two different spheres: the market and family life (Kjærnes 1999), a duality, which should also be reflected in studies of food (Gronow and Warde 2001; Warde 2002; Miller 1998).

In recent years, the perspectives of social scientific studies of food have been broadened further and include, for example, important contributions from economic sociology (Warde 2002; Harvey, Quilley and Beynon 2002; Dulsrud 2002; Jacobsen and Kjærnes 2003) and social geography (Marsden, Flynn and Harrison 2000; Murdoch and Miele 1999; Murdoch, Marsden and Banks 2000; Vittersø 2001, 2003) as well as political economy (Fine 1996, 1998). Moreover, food consumption as a form of political voice has received considerable attention, not the least with reference to organic food. The term 'political consumption' emerged first in marketing research, where it is still being applied, referring to a group with particular values and lifestyle. In social scientific work, this is rather studied as a phenomenon associated with changing forms of political mobilisation and voice, referring, among other things, to democratic theory (Micheletti 2003), and to changing relations between consumers and suppliers (Halkier 2001).

These latter contributions direct attention towards the structures of systems of provision and the political and institutional contexts of distribution and consumption, as well as consumers' participation in these contexts as both buyers and citizens. Thus, the focus of much recent work has been redirected from a concern with the role of food in family life towards social, political and institutional conditions for the consumption of organic food.

What emerges from these very diverse social scientific approaches is that the consumption of organic food can be many-sided and complex. A common theme is that in order to understand the ways in which people experience organic food, how they evaluate such key concepts as 'safety' and 'quality', and 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 action and the manner in which everyday activities are embedded in interpersonal relationships and institutional patterns.

Differences in the priority accorded to various quality attributes of food may reflect differences between the roles of social actors in the food system. In a Norwegian study of quality

conceptions related to the purchase of vegetables, Lien and Døving (1996) found substantial differences between consumers, wholesalers, retailers and farmers with regard to their conceptions of "good quality". Consumers and farmers had a common focus on quality aspects that are not immediately apparent in the store. These included the nutritional value of products, their taste and the extent to which they were produced in an environmentally sound manner, whereas wholesalers and retailers focussed more on aspects of the products' appearance, such as their size, colour and form.

Several studies undertaken during the 90's and reviewed by O'Doherty Jensen *et al*. (2001) have addressed the way in which consumers evaluate food. Many studies document a tendency to evaluate the quality of products in terms of the extent to which they are perceived as being "natural" or "artificial" (Wandel and Bugge 1994, Bugge 1995, Bugge and Wandel 1995, Holm and Kildevang 1996, Holm 1999). Results from a regional survey in Southern Norway, indicate the need to supplement this focus on product attributes. It was found that consumer considerations related to the choice of food include a range of issues related to the product itself as well as issues related to the food system as such (Torjusen *et al*. 2001). It is important to note how broad the range of consumer interests may be, which can be discussed as consumer conceptions of aspects of 'quality', just as it is important to keep in mind that different concerns may be relevant to consumers in specific contexts.

2.2.2 Organic food as a strategy to deal with worries about the safety and quality of food

According to the sociologists Ulrich Beck (1992) and Anthony Giddens (1991), modern society is characterised by a higher level of reflection and risk consciousness among lay people than in former times. Beck argues that we have moved from 'industrial society' to 'risk society', the latter being characterised by an increased recognition of the potentially negative effects of scientific and technological developments. People feel aware of risks confronting them, which are neither limited in time (future generations may be affected) or space (they reach beyond the local community). Food might be seen as offering a special opportunity to re-link with both the natural and cultural environment. Consumers' interest in information about the origin of the food, and it's further biography along the food chain (food additives, degree of processing, distance travelled etc) can be interpreted as their way of finding alternatives to the modern, industrialised food system.

Concern, uncertainty, worries and mistrust are important issues in contemporary discussions about food consumption. For example, a Danish qualitative study found that the choosing of food was associated with feelings of insecurity, confusion and mistrust in the products, as well as guilt about the lack of consistency between wishes/intentions on the one hand and actual choices made on the other (Holm and Kildevang 1996; Holm 1999). Similar conclusions are also drawn in Norwegian studies of consumer trust (Nygård 1999) and organic food (Torjusen *et al*. 2001). These studies suggest that buying organic food can be one of several possible strategies for dealing with worries about the safety and quality of food, and they also suggest that consumer concern about the safety and quality of food is widespread. Those themes which are identified as common concerns regarding food quality among Danish consumers, are largely the same as those identified as motives for buying organic food (O'Doherty Jensen *et al*. 2001:72).

Consumers' concern about food quality appears to be connected to both food production and food processing (O'Doherty Jensen *et al*. 2001:72). Concerns about long-term consequences for health and for the environment are also commonly mentioned when consumers talk about food. Holm (1999) concludes that, for some consumers, this concern about modern industrial food production leads to explicit criticism, while for the majority it presents itself in the more latent form of mistrust and insecurity. The implications of this for research are that in the case

of latent forms of mistrust and insecurity, consumer concerns may be far from clearly articulated. Methodologically speaking, it can be therefore a challenging task to obtain data that can document the character of these concerns.

Kjærnes (2003) argues for the adoption of a sociological approach to understanding consumer trust and risk perceptions. Her observation is that distrust has been traditionally regarded (by market analysts and economists) as constituting a kind of "failure" (Kjærnes 2003). It has been conceived as a problem to be fixed, repaired or restored, not as a potentially constructive force, having creative value or as representing an important input from consumers. Against this point of view, Kjærnes argues that consumer distrust is a valuable communication from consumers, which could be used in very constructive ways. In the context of the *Organic HACCP* project – looking at the possibilities for defining consumer generated critical control points for the improvement of organic food production – paying attention to consumer distrust in food and the food system could be expected to give us vitally relevant information

2.2.3 Methodological aspects

Like cognitive and behavioural studies, including market studies, social scientific approaches employ quantitative as well as qualitative methods, alone or in combination. The research questions are, however, somewhat different. While segmentation analyses seek to identify meanings of consumption by means of statistical co-variation, social scientific studies seek to identify the mechanisms that can explain *why* people characterised by one set of background variables rather than another tend to prefer some kinds of consumer goods rather than others, or why they tend to pursue particular kinds of practices rather than others. Importantly, these explanations are sought not only within the minds of the individual consumer, given his/her informational input, but rather in the social, cultural, and institutional conditions that frame consumers and consumer practices.

Quantitative approaches. Consumer surveys within the social sciences typically aim to generalise from data obtained from a sample of respondents to conditions that hold among a larger population. Emphasis is therefore placed on methods of random selection, which ensure that the sample drawn is a representative sample. There is a long tradition within sociological research of studying variations in consumers' understanding, opinions, attitudes and behaviour as correlated to background variables such as gender, age, education and socio-economic class. This approach has also been applied in studies of consumer attitudes to the environment (see for example Lavik and Enger 1995). In these studies, background variables are generally treated as explanatory variables. The theoretical challenge of such studies, however, remains that of accounting for the social mechanisms underlying such correlations. In this respect social scientific surveys diverge from those in which purely descriptive results are offered, sometimes in respect of non-representative samples.

Qualitative approaches. Qualitative studies of consumer attitudes towards organic food usually aim to understand the *meanings* of consuming organic food, as conceived by consumers (Solér 1997, Iversen 1996, James 1993, Halkier 1998, Torjusen 2001). A central assumption of these studies is that one of the factors influencing consumers choice of organic food is whether or not they perceive meaningful connections between these products and environmental or other concerns and values in their everyday lives. The results of these studies suggest that understanding consumers' relation to organic food is a complex task, in which many different aspects call for consideration. Health, environmental concern, ethics, authenticity and taste, as well as concerns about the relations between people and nature, are examples of some of the broad themes, which recur in this literature. The results of the relatively few qualitative studies in this field indicate that the ways in which consumers deal with environmental issues in their everyday lives, has just as much to do with making their lives meaning-

ful as it has to do with rationally selected means to achieving specific end goals[6] (Halkier 1998,7). These qualitative approaches do not dispute that consumers may relate to environmental problems in rational ways, but they argue that current explanations place too much emphasis on this point at the cost of failing to appreciate the complex character of social practices, such as that of choosing food, which are deeply embedded in the dynamics of everyday life.

2.2.4 Some social scientific points of critique of cognitive and economic approaches to consumption

Within a marketing approach, whether or not consumers choose to purchase a particular commodity is taken to be the indicator of consumer demand, and often used as a basis for interpreting consumer interest. This approach, according to Warde and Martens (1998), is inadequate in that purchases represent only some of the ways in which consumer choice and influence are exercised. They distinguish different levels of choice, as this term is defined in a common dictionary. These are: 1) to select; 2) to pick in preference; 3) to consider fit or suitable; and 4) to will or determine. They argue that these levels of choice tend to be mixed up without reflection in public debate about consumption, and sometimes in academic discourse. The fourth level of 'choice' for instance implies the existence of freedom for an individual to determine his or her own fate, while the first two by contrast merely entail picking among a given set of items that are available. It is choice in the latter sense only, for which purchases made can serve as an indicator.

The seemingly great freedom of choice and influence of the consumer is often overestimated, and from Warde and Martens' argument it follows that the "truly sovereign consumer" is closer to fiction than to reality[7]. They conclude that: "*... the term "choice" inflates the importance of individual decisions and conflates qualitatively different aspects and level of discretion*." (Warde and Martens 1998:144) They further sum up some of the types of restrictions on personal choice, among them: the availability of resources, systematic inequalities of power in decision-making, shared cultural and aesthetic judgement, and "situational entailment". They claim that a sociological approach should aim to describe those processes, which restrict freedom, understood as determination of will, and the components of the social logic of restricted choice (Warde and Martens 1998:144).

Regina Birner *et al*. (2002) also argue against the assumption that the failure to buy something indicates a lack of interest on the part of the consumer. One basic shortcoming of the tendency to interpret purchase as indicating interest in and support for a particular product is the lack of opportunity to communicate consumer dissatisfaction or desire for change. There is no way to receive qualitative information about what consumers actually want unless the exact incarnation of their wishes are to be found among the products offered on the market. The inverse of this reasoning is to draw the conclusion that the only reason why consumers might not buy a certain product is a lack of interest in that product. Birner *et al.* list a number of other plausible reasons why consumers may not buy particular products, such as organic food. Factors connected with the product that might influence a decision not to purchase organic food include price distortions (due to external effects, differences in profit margins and know-how), problems of availability, advertising and labelling of products. Factors related to the decision-making of consumers include: trust, information costs and logistical problems, as well as social context and habits (Birner *et al*. 2002:25).

[6] Norwegian/Danish: "formålsrasjonalitet"
[7] A thorough critique of the realities behind the idea of the free choice of consumers is also given by Conrad Lodziak (2002) in his book "The Myth of Consumerism".

Market research is designed to address the shortcomings of consumer feedback as measured only by sales. However, as we have tried to show here, much market research remains characterised by limitations. Given a common focus on the meanings of consumption in segmentation analysis and much social research, a further point should be made. One implication of the aim of connecting behaviour to identity and life-style in consumer segmentation is that the communicative aspect of consumption tends to be over-emphasised, because it is mainly through attributing meaning that consumption signalises identity. Attempts to categorise consumers as belonging to different segments, involves the process of attaching meanings to some variables, in the light of which behavioural variables are interpreted. One pitfall is that the conclusions may be the same as the basis for the segmentation, so that the results become merely tautological (for example: “sceptical greens are sceptical”). It is important to keep in mind that the categorisation is itself an interpretation, but is often presented as if it were a reflection of a given and stable reality. Analyses of this kind may serve as a useful basis for strategic marketing decisions in the shorter term, but are unlikely to serve the purpose of understanding or explaining the dynamics of changing patterns of consumption in the longer term.

3 Factors Influencing Consumption of Organic Foods

Given the time available for the completion of this task, seen in relation to the very extensive quantity of the available data, we decided that the most fruitful approach would be to select a small number of European countries that differed from each other on a number of significant points. The data regarding each of these countries could then be considered in somewhat more detail than would be feasible in regard to a larger region. The need for this strategy also arises from the character of the available empirical studies and research, as already outlined in Chapter 2. Thus, a summary account of quantitative data that remained unrelated to the contexts in which empirical findings arose would in all likelihood have yielded results that are grossly misleading.

The success of this strategy, however, is dependent on the selection of the countries that will constitute each such case study. Firstly, relevant points of difference between countries should reflect differences that are significant within the region as a whole. These include such issues as population size, the relative size of the agricultural sector, and membership status *vis-à-vis* EU. Secondly, and not less importantly, significant points of difference should regard factors likely to exert a strong influence on the level of consumption of organic foods as well as upon consumer conceptions of these foods and food concerns more generally. These include such factors as the relative maturity of the market for organic foods, the role of that market in local, national and international chains of distribution, and the extent to which it is subject to political regulation. Thirdly, the selection of cases should take account of the countries and sub-regions that will be selected for more detailed analysis within the *Organic HACCP* project as a whole.

Careful consideration of these factors has led to our selection of four case studies, each of which is designed to represent a type of consumer market for organic food products. These case studies will be presented in Chapters 4, 5, 6 and 7, and regard the following four countries: Denmark, UK, Italy and Hungary.[8] The present chapter outlines the contextual factors that have functioned as criteria of selection and exemplifies them with particular regard to these four countries. It presents the selection of criteria that we found to be among the most important for this project. For each criterion we will show how it can be expected to influence consumer conceptions of organic foods. We will also exemplify this by introducing some of the wider, comparative literature and empirical studies with regard to the European region. Finally, we will clarify our selection of these four cases by illustrating how each represents a distinct profile when the country at issue is characterised according to these criteria.

3.1 Agricultural production

The first point of difference to be considered regards the character of agricultural production - conventional as well as organic – in these countries. Relevant factors include the relative size

[8] The language skills of the research team are such as to give access to all literature published in English and Danish, but not Italian or Hungarian. Case material regarding the latter countries is therefore less than complete.

of the agricultural sector and its organisation, as well as the relative size and type of organic production.

Agricultural tradition

Figures regarding population size, extent of arable land and numbers employed in the agricultural sector, serve as indicators of the importance of agriculture in a specific country and of the extent to which the members of a given population are directly acquainted with agricultural production. These factors are important for understanding national and local differences between the ways in which organic production and consumption are conceived.

In countries in which conventional farming is highly industrialised, organic production may be conceived as an alternative, even a necessary alternative, to the model of industrial production based on chemical inputs. But there are also countries, in which agriculture has not developed according to this model, in which farming entities are smaller, and methods of production have not changed considerably from traditional production methods. In the latter countries, the concept of organic production may have less impact, insofar as it does not represent an arresting contrast to conventional farming in the same way, as it has tended to do in more highly industrialised countries. Examples of the former kind are Denmark, Sweden and England, each of which has witnessed serious consequences of industrial agriculture in terms of nitrogen leakage, soil depletion, loss of biotopes and plant and animal species (Källander 2000:276). An example of the latter is Poland, which, in contrast to some of the other East European countries, has maintained a structure of small-scale private production. This organisation together with a poor economic situation for Polish farmers has meant that the level of pesticide use is among the lowest in Europe, and that Poland has preserved a relatively unspoiled environment. These factors, together with a social structure in which 30% of the population is involved in agriculture, has been assessed as constituting a good basis for the development of an organic sector (Staniszewska and Hajduk 2002). It does not constitute, however, a situation in which the demand for organic products is likely to e be as pressing as that seen in more highly industrialised countries, in which negative consequences of industrialised agriculture have been given considerable attention by mass media. This pattern has been found in Hungary, where it has been noted that that Hungarian consumers do not associate the production methods of domestic agriculture with problems of environmental pollution. This factor, it has been suggested may contribute to the low demand for organic foods among Hungarian consumers (Kürthy-Baricz 1996).

Thus, the economic and social structure, apart from natural conditions such as climate and the relative extent of arable land, will have implications for the establishment of an organic sector. These factors will influence how the concepts of organic production and products are understood and to what extent there is likely to be an interest in defining organic production as a distinct type of production. These factors also provide a context for assessing consumer concerns with regard to such issues as product quality and safety, as well as responses to organic labels or fear of fraud.

Organic production

Organic agricultural production can be described in terms of its size, as compared to conventional production, and whether it is small scale or large scale. These factors will influence its impact on agricultural production as a whole and the extent to which production methods are regarded as similar with respect to their modes of organisation.

There are also significant differences regarding the extent to which production figures include processed foods or refer only to primary agricultural production. When data are available and of importance to the characterization of a specific country, we will include figures regarding both primary and secondary production as well as comment on the level of each. Generally,

however, only figures regarding primary organic production are available and for this reason we focus on primary production in this presentation of contextual factors.

3.2 Regulation, labelling and market communication

The characteristics of 'organic foods' are defined by their meeting a given set of standards, which can and do vary from one country to another. They can also vary within a single country, depending upon the number of private or public bodies involved in setting more or less stringent sets of standards and certifying production accordingly. The number of certifying bodies operating in any one market is one of the contextual factors likely to play a significant role in consumer conceptions of organic foods, since labels serve to provide relatively clear or confusing signals with regard to the meaning of the term 'organic'.

Standards, regulation and authorisation

Organic standards, regulation and authorisation can be defined on an NGO level (non-governmental organisation), on a national statutory level or on a EU level. In so far as the standards of national governments and/or non-governmental organisations depart from EU standards, they tend to do so in the direction of being more stringent. There are three EU regulations that are often referred to in relation to organic food production. The first is Council Regulation (EEC) No 2092/91 of 24 June 1991 on O*rganic production of agricultural products and indications referring thereto on agricultural products and foodstuffs*. Another is Council Regulation (EC) No 1804/1999 of 19 July 1999, which is a supplement to 2092/91 with regard to livestock production. These two regulations constitute basic standards for the certification of foods and food production among EU member countries as well as the demands that must be met by all imported foods sold and labelled as organic produce within the EU. A third regulation, which is mentioned in the literature, is Council Regulation (EEC) No 2078/92 of 30 June 1992 on agricultural production methods that are compatible with requirements for the protection of the environment and the maintenance of the countryside. This is an aid scheme with the purpose of motivating the implementation of productions methods that are more environmentally sound (http://europa.eu.int/eur-lex/).

Most countries have undergone a development in which NGOs have initiated the formulation of standards for organic production. These have largely been organisations of producers and growers, although in some instances consumer organisations have also been involved. In some countries, these standards have been adopted or incorporated into state policies on agriculture and then later, for EU members, have been adapted to the EU-regulation 2092/91. This is the case for example in Finland, which has had standards since 1986 and where state inspection was introduced in 1994. It is also the case in the Netherlands, where statutory regulation of conversions was introduced in 1992 and an action plan was formulated in 1996. National governments have played a similar role in Denmark and Sweden, transforming NGO standards to official national policy at an early stage, as well as formulating specific action plans for the organic sector.

Other countries have not had any nationally adopted standards prior to the implementation of EU regulation. An example is Greece, which had no state regulation or national standards, and where the EU-regulation 2092/91 brought major changes to the organic sector.

European countries outside the EU have generally harmonised organic standards to EU-regulations. This has been done with a view to promoting exports to EU member countries and as part of the preparation for future membership. In Estonia and Poland, the first organic standards were formulated in 1990, drawing upon IFOAM standards. These were revised in Poland in1998 to meet EU standards. A proposal to introduce state regulation of organic production was proposed in 2000 (Metera 2000). Estonia, on the other hand, has had regulation

of organic production since 1997, although these were not harmonised with EU-regulations until 2001 (Mikk 2000).

Certification and inspection of organic farms are carried out by authorised bodies according to the particular set of regulations adopted. In some countries these are representatives of state institutions, in other countries they are private firms or representative of national or international organisations.

Subsidies

Another point on which European countries differ regards their access to subsidies. This important factor not only has an impact on organic production and the development of an organic sector, but also upon the conception of organic foods in a particular society and the reasons for which they may be valued.

For EU member countries there is, in theory at least, the possibility of obtaining financial support through programs on agricultural production, rural development and environmental protection. The above-mentioned regulation no. 2078/92 is now no longer in force, but it has served to boost conversion to organic production in many countries. In some countries, this regulation provided the introduction of support to organic farmers. Another regulation that can in theory have a potential impact on the organic sector is Agenda 2000 (regulation 1257/99[9]), which establishes a framework for community support for sustainable rural development and is designed to complement other instruments of the common agricultural policy. Whether policies like these do in fact have an effect on the organic sector is dependent on how these subsidies are administered by the different member states. To what extent subsidies to agri-environmental programs s are aimed specifically at organic production or emphasise other issues or wider goals, is a matter that differs from one country to another.

Spain and Greece are examples of countries that have had no subsidies until EU regulation 2078/92 was adopted respectively in 1995 and 1996. In both countries this initiative resulted in a vast increase in the numbers of organic farms (Picazos and Parra 2000; Van der Smissen 2000). In other EU member countries, it had been possible to get state subsidies for conversion before the EU-regulation was introduced. This was the case in Sweden as from 1989, in the Netherlands as from 1992, and in Denmark as from 1993. Among non-EU member countries, some have offered support, not to organic farming as such, but to information campaigns, inspection procedures and marketing for export.

Identification by labels

Labelling indicates a standardisation of products according to specific criteria. As such it plays a crucial role in mediating all communication from producers to consumers that takes place outside of the context of face-to-face trading. Since only a very small proportion of organic products are distributed directly, in a manner that involves face-to-face contact between organic producers and consumers, organic labels are of great importance. One can say that organic labels and the labelling system as a whole become a concrete expression or symbol of the organic sector, its regulation and the mode of organisation associated with it. For the consumer, the label will have central significance for how products are judged and for the qualities ascribed to them. Just as the branding of food products serves as a means of identifying products which are associated with the image of a particular firm, so an organic label functions as a means of identification with regard to organic foods. At the same time, it serves as a symbol of regulation and of the public discourse associated with these products.

Some researchers have noted that our modern global food system gives rise to a demand for transparency (Stevenson 1998). In this context the label is a way to get information and be-

[9] Council Regulation (EC) No 1257/1999 of 17 May 1999 on support for rural development from the European Agricultural Guidance and Guarantee Fund (EAGGF) and amending and repealing certain Regulations

come acquainted with the product. Guided by the label the consumer can gain some level of certainty about the quality of product. It offers a choice to the consumer, but whether the choice actually reflects his or her preferences is dependent on his or her specific conception of what the label stands for.

Some studies point to the fact that consumer interpretations of a given label frequently do not correspond to the reality behind the label. Labelling is therefore not just a question of guiding but also of not misleading. Some of the factors that influence whether labels do actually promote transparency are whether consumers have information about the labels, whether they have confidence in the labels, how many labels there are, and whether certification and inspection is done by state officials or by private firms. There are differences between countries as to whether there are many organic labels or just a single label and whether labels are private or state controlled. State regulation is traditionally a source of trust (Sassatelli and Scott 2000: 236), and a single state controlled national label automatically indicates standardisation of the given domestic market, whereas a larger number of private labels will not imply or convey standardisation in the same way. It would seem that a simple labelling system provides a better basis for label recognition, and potentially for the development of confidence in that label. On the other hand, a simple labelling system cannot provide the same variety of product information, as a number of different labels would tend to do.

In the Netherlands, Sweden and Denmark there is one inspection body and one label. In Denmark, it is a state label, and inspection is carried out by state officials, whereas inspection is undertaken by private organisations in Sweden and the Netherlands (KRAV and SKAL). In the UK, there are organic labels from different organisations as well as a state label. But one label tends to dominate the market and is known by many consumers. This is the label of the Soil Association, which certifies 70% of organic food products. In Italy, there are ten different organic labels at present. One of the hindrances to the development of the organic sector in Italy is said to arise from confusion about the concept and the lack of awareness of the principals of organic production among consumers. In Poland, the government has attempted to regulate food labelling, and to protect labels such as "healthy food" and "food without pesticides" since 1994 (Metera 2000:232).

Label recognition and trust in different countries

The organic label is central to the handling and definition of what organic food is, but from a consumer point of view it is just one token of quality among others. Besides organic labels, there are many competing brand labels, some of which will be associated with quality differences (Mayfield, Holt and Tranter 2001). This means that labels, as a means to transparency and assurance of quality, can have different meanings for consumers in different countries. Label recognition and consumer understanding of the term organic was examined in the EU-funded project "CONVENSION". The results indicated that in the UK, Denmark, Italy and Austria there is good consumer *understanding of the term organic*[10] and in the UK, Denmark and Austria, there is also good organic *label recognition*. In Italy, however, there is a great deal of confusion about labels and also scepticism about the authenticity of much organic food. Part of the reason for this can be the lack of a single label or lack of conformity between labels in Italy.

Label recognition in Ireland and Portugal was also found to be very poor. In Ireland, a greater number of respondents recognized the UK's Soil Association label than those of any Irish organisations. This is both an indication of the significance of the UK label, but also of Ireland's reliance on imports from the UK. In Portugal, there is very little understanding of the term organic, both by producers and consumers. One study showed that two thirds of consumers had never heard the term (Mayfield *et al.* 2001).

[10] In the case of Italy, this result is contestable according to other results stating a very little knowledge of term among consumers. We will look at this in more detail in chapter 7.

Much of the research on this issue indicates that the success of a label is a reflection of consumer loyalty and/or trust. Several researchers who have undertaken comparative studies have noted a difference with regard to the character of trust in different countries. On this basis, Sassatelli and Scott (2001) differentiate between 'embedded' and 'disembedded' trust. The first is a traditional and localized form of trust grounded in local knowledge and in human relationships that are often sustained by means of face-to-face interaction. The second is universalistic and grounded in institutions. The process of labelling as we have seen is grounded in the latter manner and is related to universalistic and technocratic and forms of trust. In their comparative study of Italy, UK and Austria, Italy is characterised as representing embedded forms of trust, whereas UK represents a country characterised by disembedded forms of trust. This factor contributes to the explanation of why standardised labels are found to have more impact on British consumers than on Italian consumers. In countries like Italy, where embedded trust is more common, labels have better success when they communicate specific characteristics of products, such as the locality of production and the traceability of the product, rather than representing some technocratic, harmonised rules. This notion of disembedded trust might also explain why, in another comparative European study, the extent to which brand and quality labels were ranked as being helpful to consumers, was more highly rated in the UK and in Sweden than in Spain, Italy, Ireland or Germany (Henson and Northen 2000)[11].

The limitations of labels

As mentioned above, organic labels express the fact that a given set of rules and regulations have been complied with, but any given set of rules does not necessarily correspond to the criteria governing consumer selections of food. Other kinds of food labels can remain of significance to consumers of organic foods. To give an example: The EU regulation focuses upon detectable differences with regard to the process of production, but does not include specific demands regarding locally sustainable production. Therefore, organic labels based on EU criteria are not required to offer information about the traceability of products. But traceability, and the labelling of origin, can be of significance to consumers for different reasons. Some consumers of organic foods consider local sustainability to be important. It has also been ascertained by research in several countries that most consumers have a preference for domestic rather than imported products. Information on this point is not always conveyed by the labels on organic products. In Denmark for instance, a bag of flour labelled with the logo of a Danish mill and carrying the state-controlled organic label, can be made from imported grain. Consumers have no basis for knowing whether or not this is the case, but interpret the label as meaning that the product is Danish, not imported. The issues of traceability and transparency are particularly pertinent in relation to the discussion of GM food products. Organic labels that are in accordance with EU regulations do not allow the use of GM ingredients in food products. But GMOs are not traceable in derived products such as oil or sugar, and are not declared. It is nonetheless important to most consumers of organic foods that they are able to avoid such products.

[11] The study was conducted in Germany, Ireland, Spain, Sweden, Italy and the UK as part of the EU-funded project "Quality Policy and Consumer Behaviour" (CT-95-0046).

Table 3.1: Regulation and labels

	Denmark	UK	Italy	Hungary
EU MEMBER	Yes	Yes	Yes	No
POLICIES ON ORGANIC PRODUCTION **Organic standards**	1981: NGO (LØJ) standards of organic farming based on IFOAM standards 1987: first official national standards 1995: first action plan introduced by the Ministy of Agriculture, Food and Fishery 1999: second action plan	1967: NGO (Soil Association) First guidelines on organic farming 1973: Organic certification by the Soil Association 1983: Organisations of organic farming established the British Organic Standards committee Was later superseded by Government led UK-register on organic food standards (responsible for implementing 2092/91	Mid eighties: NGO nation-wide selfregulatory standards 1992: Federative network upon the adoption of 2092/91	1987: standards by NGO (Biokultúra) (based on IFOAM and the Soil Association) 1995 IFOAM-accreditation 1996: Hungary is included in the third country list under EU-regulation 2092/91 1999: A new state regulation
SUBSIDIES	1993: State support for organic conversion and farming	0.2 of the total UK spending on agriculture is spend on organic farming (The Soil Association 2000)	State: support of campaigns and education. Some regions provide extra support besides the 2078/92	State support aimed at export potential, i.e. marketing support and support to applying with EU demands. 1998: some state support directly to farmers (approximately 400,000 Euro in 2000)
Labels of organic foods	One national label, an official set of regulation, inspection by the state	One state label, UKROFS Organic, and labels from different certifying and inspection bodies. One is the Soil Association, best known label and inspects over 70% of the organic food in Britain	Ten certifying and inspection bodies each using their own labels	Since mid 80's: inspection by foreign bodies and Hungarian Biokultúra Accreditation of Biokultúra by the state, according to EU regulation 2092/91 means that Biokultúra is now inspection most of Hungarian organic production

From studies regarding consumers responses to the issue of GMOs, it would seem to be ethical and environmental concerns, rather than worry about individual health, that induce people to be critical towards the use of GMOs in food production (Lassen, Madsen and Sandøe 2001). It therefore seems to be important that consumers are given information regarding the history of the production process and not just information regarding measurable attributes of the product itself. Similarly, in regard to the issue of imported products, information about the distribution process is relevant.

According to this view, a detailed and transparent labelling system is important. But, on the other hand, this will require more attention from consumers. The point is that labels do in fact express compliance with a specific set of rules, but at the same time they function as symbols inviting consumers to associate whatever beliefs they might happen to hold about the meaning of organic production or distribution to these products.

3.3 Distribution

International distribution

Figures regarding organic production do not necessarily reflect the level of organic consumption in any given country. An important factor in each case is the extent to which production is primarily targeted to export markets or is aimed at the domestic market. In some countries, consumer demand on the home market has been an important driving force for the development of organic production, together with idealistic producers among the pioneers. This has been the case in the Nordic countries, the UK and in the German-speaking countries of Europe. In other countries, the introduction of the concept of organic production, its implementation, as well as the introduction of a system of registration and authorisation, has been initiated by foreign investors and interests. A good example of the latter pattern is Greece, where commercial organic production was initiated by Dutch and German companies interested in promoting the production of organic currants, olives and olive oil in the 1980s, and where foreign certification bodies have been involved in the conversion of farms (Van der Smissen 2000:131). Another example is found in Hungary, where foreign certification bodies played a significant role in the certification of organic production until the late 1990s, and from where almost all organic production has been for export. Countries outside the EU can be included in a "third country list", in the sense that they exercise inspection according to EU regulations. This has been the case for Hungary since 1996 and has been an important factor for export potential to EU countries.

Table 3.2: Organic agricultural production/import and export

	Denmark	UK	Italy	Hungary
Organic farms	3,525	3,981	56,440	1,040
% of all farms	5.58	1.71	2.44	-
Organic hectares	285,500	679,631	1,230,000	105,000
% of all farmland	11.3	3.96	7.94	1.80
Import or Export or home market of organic production		75% of the consumption is imported. Export is negligible	1/3 of the production is exported	Export oriented, about 95% of the organic products are exported

Sources: SOEL/FiBL (2003)

Domestic distribution

The term *'* distribution profile*'* is used here to refer to different types of sales outlets for organic foods within any specific country. The types of outlets at issue are supermarkets, smaller specialised stores and alternative forms of direct distribution such as farm shops, farmers' markets and vegetable box schemes.

The distribution profile regards the development of the organic market in a specific country and to some extent the maturity of the domestic market. The tendency is that the more widespread the demand for organic foods, the larger the range of products available and the larger the market share held by major retailers such as supermarket chains. It also seems to have a favourable effect on the level of organic consumption that the products are to be found in stores in which the majority of people normally buy their daily groceries. As such, the distribution profile can have implications for the promotion of the organic sector. An important point of difference between countries regards whether existing trends can be characterised as developing towards a normalisation of organic sales and consumption or whether there is rather a market 'niche' that remains separated from the conventional food market.

The distribution profile is relevant for the conceptualization of the term 'organic' by consumers, and for the particular range of values that are associated with the term as well as those

which are not. Part of the reason for this is that the distribution profile determines which sets of social actors (farmers and growers, wholesalers, retailers, politicians, marketing experts and/or consumers) have central influence on the organic market. Another reason is that different distribution channels represent different frameworks for the exchange of food products as well as of information about food and its qualities. This in turn entails that consumers will tend to ascribe certain values and a certain image to organic food products, depending on the distribution channel.

Supermarket sales

When larger supermarkets get involved in the organic market it marks the development of the market in significant ways. The relation between the retailer and the supplier becomes more formal and takes a contractual form (O'Doherty Jensen *et al.* 2001:22). The introduction of organic products to conventional stores, in which most people buy most of their food, tends to normalise organic consumption as such. In countries in which supermarket sales have taken the lead, there has been an increase in both supply and demand.

When major retailers have a central position in the organic food market, they also tend to play an important role in regard to safety and quality demands. One example of this is the development of processed products carrying own labels and brands as part of a strategy to establish and maintain consumer loyalty to the supermarket chain, rather than to primary producers, competing brands or certifying organisations, such as that of fair trade. In such a setting, it is more likely that retailers will be conceived by consumers as highly important actors on the organic market than is the case in countries in which small scale specialised shops or markets play a more dominant role.

In Denmark, the UK, Finland, Sweden, Austria and Switzerland, retail chains are dominant on the organic food marked.

Specialised food stores

Specialised small shops, such as health food shops or shops specializing in the sale of fair trade or environmentally sound products, comprise a different kind of sales channel. These shops tend to follow that of direct sales from farmhouses as initial outlets for the sale of organic products. Along with running a business, health food shops often promote a particular ideology and certain values concerning consumption and the social or natural environment. They may also be linked to particular cultural or political networks or based on a cooperative structure.

Food and purchases from health food stores are often associated with healthy food and living. This means that organic food is apt to obtain an image that is closely connected to health issues in countries in which this is the primary outlet for these foods (O'Doherty Jensen *et al.* 2001:22). In Germany and the Netherlands, most organic food is sold through such stores. In the Netherlands health food shops hold half of the market share of organic foods, while supermarkets had a market share of 27% in 1998 (Francesco 2000:210). In Germany, the market share held by supermarkets is lower again (Haccius and Lünzer 2000:122).

Alternative channels

Alternative sales channels include the direct distribution of products by farmhouse outlets, farmers' markets, vegetable box schemes and community-supported agriculture (CSA). While farmhouse sales constitute the oldest traditional outlet, direct sales are still relevant to most organic farmers. One reason for this is the economic incentive to farmers and growers, who retain a greater share of the profit when wholesalers and retailers are excluded from the chain of distribution. They also retain, however, all costs and resources of time-use that are incurred in relation to the tasks of distribution.

Box schemes are usually organised such that purchases are delivered directly to consumers at a fixed price. Both farmers' markets and/or box schemes have become increasingly important for the organic market in the last 5-10 years in such countries as the UK, Denmark and Holland. Analyses from the UK, indicate that in 1999 the demand for local organic produce outstripped supply. Many box schemes are oversubscribed and the demand for farmers' markets is greater than the availability of local producers in many areas (Soil Association 2000). In the Netherlands approximately 45,000 households buy organic products by means of a box scheme, while in Denmark it can be estimated that at least 30,000 people do so (Francesco 2000; Odgaard and O'Doherty Jensen 2003).

The increase in alternative outlets is an interesting trend in the sense that it is now also seen to occur in countries in which the organic sector and market is well established and relatively mature, such that a broad range of organic products is readily accessible in most convenience stores. This implies that the increase in direct sales channels is not a result of lack of accessibility, but rather of something else.

A third way to acquire organic foods is through CSAs[12], which have been established in UK and some few other European countries, as well as in the USA, Canada and Japan. This is an example of alternative distribution of food based on direct face-to-face relationships between producers and consumers, and in which consumers sometimes take an active part in producing or harvesting the food. CSA systems can be regarded as a practical arrangement whereby the physical distance between partners in the chain of food distribution is drastically reduced or eliminated. Members are often found to be motivated by a wish for "de-commodification" of food. Consumer benefits, which are sometimes declared objectives of the CSA-concept, are those of bringing the consumer closer to the farmer and to food production, providing access to locally identifiable, fresh food of high quality at affordable prices, providing access to organically produced food, and an opportunity to build personal trust relations. (Feenstra 1997; Cone and Kakaliouras 1995).

Table 3.3: Organic consumption

	Denmark	UK	Italy	Hungary
Per capita sales of organic produce (2000)	72	16	17	-
% of total food sales (estimates 2000)	2.5-3	1.0-2.5	0.9-1.1	-
% of total food sales (estimated forecast for 2003)*	2.2-2.7	1.5-2.0	1.0-1.5	-
Annual growth in % (forecast for 2003-2005)*	0-5	10-15	5-15	-
Share of organic products' value sold via retail chains (2000)	0,86	0,78	0,42	-

Sources: Soil Association, Fibl/Compiled by ITC, December 2002 and ITC 2002
*Note: Official trade statistics are not available. Compilations are based on rough estimates.

Alternative distribution channels and organic values

Some studies have pointed to the fact that consumers who prefer organic food products in contrast to conventionally produced products tend to use alternative channels of distribution and specialised health food stores more than supermarkets. This has led some researchers to elaborate on the relation between the outlet and the values associated with the food, some arguing that certain values associated with organic food are not supported by the commercial interests of major retail chains.

A growing concern from many parts of the organic movement about the increasing involvement of big business in the organic food chain address the same issue. It has also been raised by studies of market opportunities and hindrances, which note the problem that market struc-

[12] 'CSA' is an abbreviation of 'community supported agriculture'.

tures dominated by supermarkets do not effectively meet the demands of all segments of organic consumers.

To explain this pattern, researchers have highlighted such issues as the distance between consumers and food reflected in the lack of knowledge about the origins of products, the absence of personal relations with the producer, or lacking experience of the process of production as such. The rationale is that with globalization of food distribution, which involves greatly increased distances between producers and consumers as well as greatly increased levels of food processing, some consumers want a more personal contact with producers and turn to local or direct channels of distribution (O'Doherty Jensen 2001:73). They point to an apparent synergy between buying organic food and buying food through alternative channels and find this interesting in several ways, for instance in terms of how and where consumers place their trust.

One reason for using alternative outlets is thought to be due to the social networks that are often established in relation to them. It is characteristic of some consumers who buy food from producer collectives that they are also part of a social network of like-minded people. These networks involve face-to-face relations and provide a basis for exchange of opinions, clarification, negotiation and the accumulation of knowledge about food (Cooley and Lass 1998; Meares 1997; Hassenein 1997; Chiappe and Flora 1998).

Another reason is the wish for variation in the selection of food products and specialties. Centralisation and streamlining within food trade has led to lower prices, but also to a high degree of standardisation and uniformity. There has been little room for specialised foods, which are often produced in smaller volume, such as local specialties and organic food (Michelsen 1996; Vittersø 2001). Alternative market channels often focus on offering special, distinctive foods, and these food products can usually be traced directly back to the producer and place of production. This might potentially provide a basis for strengthening trust and confidence between producers and consumers, and may offer the opportunity for dialogue about the origin of the food, production methods and experiences of food quality (Griffin *et al.* 2000; Cooley and Lass 1998). However, it is also important to look further into the conditions under which trust and social relationships are established by means of direct sales channels, to reach a better understanding how power and privilege might be more equally distributed, as well as of the ways in which 'marketness' and instrumentalism may complicate social embeddedness (Hinrichs 2000).

This leads us to the third reason for using alternative outlets pointed out by some researchers - that these outlets provide an environment in which consumers can obtain information about the products, this in turn being considered an important aspect of food quality. Some studies document a consumer interest in knowing where food comes from and - following a number of food scandals – assurance that the risk of illness is low (Bjørkum 1999; Bjørkum and Lien 2001). There is also evidence that consumers increasingly emphasise ethical considerations and want to associate positive stories with the food they buy (Jensen 1999). The point that is advocated by these researchers is that food system properties are included in conceptions of food quality, i.e. origin and features of the production or processing of the particular foods at issue (Torjusen et al 2001, Lien and Døving 1996).

Direct distribution - ideally and really

The positive features of direct distribution mentioned above are usually credited to the face-to-face relationship between the consumer and the producer, which also serves to reduce the distance between consumers and food products. This line of argument focusing on the issue of proximity is the backbone of the discussion about the relation between producers and consumers as well as the stance that some quality attributes of organic food are embedded in the purchase situation.

This stance is clearly evident in the following description of box schemes by Purdue *et al.* (1997). Here box schemes are seen as a mechanism to "… reframe the environmental, economic and social imperatives of the food system. In relation to the environment, box schemes attempt to reduce food miles by prioritizing the local producer over global marketing, and to reduce the use of pesticides and chemical fertilizers. The economic intention is to give organic producers a stable market and to "re-educate" consumers into the "realities" of sustainable local food production and the accompanying levels and forms of consumer choice. The social aspect depends on regular face-to-face interaction between the scheme organiser, customers, and drivers or individuals who act as drop off points." (Purdue *et al.* 1997:652)

On taking a deeper look at the scale of some vegetable box schemes today in Denmark or the UK, for example, or at the character of some farmers' markets in practice, this emphasis upon locality, proximity and the bond between consumer and producer/product, must be challenged. In Denmark, the largest distributor of vegetable boxes is supplied by a widely distributed number of Danish farmers and growers, and a considerable number of product lines are imported. In the case of farmhouse shops, other suppliers than the farm itself tend to a greater extent to be locally based, but once again several product lines are also imported goods (Odgaard and O'Doherty Jensen 2003).

These facts indicate that alternative sales channels today do not necessarily provide the qualities of proximity and locally embedded knowledge that are sometimes assumed to be part and parcel of these forms of distribution. Nor do they necessarily support the values of proximity, face-to face-interaction and social and environmental sustainability. This means either that there may be other motives for using these distribution channels than those noted above, or that these values are interpreted and communicated in new ways by consumers and/or distributors. So, even if the features traditionally associated with direct distribution might still be of great importance when interpreting consumers preferences for organic food and their choice of outlet, it would seem to be advisable for researchers in this field to take a closer look at consumers motives and at the ways in which contemporary examples of these sales channels might be serving to redefine or restore notions of local embedded knowledge and proximity as a feature of direct distribution in the context of a global commercialized food system.

Price

The premium price that accrues to organic products is of significance for consumption levels. But the importance of this factor cannot be evaluated by comparing results of studies undertaken in a variety of markets regarding consumers' willingness to pay given premiums. The demand for organic products must be seen in relation to both price levels and the relative proportion of income that is usually spent on food consumption in specific countries. It should also be interpreted with regard to features of the food culture at issue in each case, e.g. the meanings ascribed to food in everyday life.

Many studies are interested in consumers "willingness to pay" (WTP) a premium price, and they aim to find out how large a premium price different groups of consumers are willing to pay for different sorts of products. It will obviously be the case that those consumers for whom organic values mean most, are also those willing to pay relatively more for these products. Hence, willingness to pay a premium price is often interpreted as an effect of personal values. This interpretation derives from a belief that the consumer possesses a surplus of financial resources, which he or she can administer according to specific personal values. Such a perception of the consumer is found in the sociological literature, portrayed as the post-materialistic consumer or the reflexive consumer whose preferences transcend basic physical needs. This perspective is partly inspired by Mallows' account of a hierarchy of needs as con-

stituting motives of human behaviour (Maslow 1954) and partly seen as being the result of individual reflections on ones own practices in relation to the surrounding society.

But in order to conceive of needs that transcend material concerns, there must be some surplus of financial resources. It is not only the premium price that is of importance but also the general purchasing power in a population and the proportion of income that different population groups usually spend on such basic needs as food. In most western countries a relatively small proportion of income is spent on food. In countries such as Hungary and other central and eastern European countries, as well as in some parts of the Mediterranean countries, including Greece and Portugal, purchasing power is much lower than that found in highly industrialised regions. In these places, the combination of low purchasing power and high premium prices for organic foods explains much of the relatively low demand and lower level of interest in organic foods among consumers.

When one evaluates consumers' interest in organic foods in relation to price, one must therefore consider both purchasing power and the premium price. It should be noted that this review will not include details about prices of organic foods. Apart from the fact that premium prices vary considerably from product to product, data on prices of different products are relatively scarce.

3.4 Other background factors

We have selected the more important aspects of central contextual factors influencing the consumption of organic food. Other factors could have been included, but the scope of this review does not permit us to give a fuller account. Two further factors should be briefly mentioned, however, before turning our attention to the four case studies under consideration in the following chapters. These are (1) the media, the character of public discourse as communicated by mass media, and the level of access to "expert" knowledge communicated in a variety of ways, and (2) the roles played by different stakeholders in the development of the organic sector and significant differences in this regard from one European country to another.

The presentation of food issues in the media and the manner in which they are portrayed influences consumers' perceptions of organic foods, not least with regard to issues of food quality, food safety, health and animal welfare. Studies document that when food-risk becomes an issue as a reaction to food scandals, such as instances of salmonella contamination and BSE, noticeable changes in people's attitudes to food occur as well as an increased interest in organic foods (Sassatelli and Scott 2001: 223; Berg 2000). This is also the case in relation to the debate in Europe on genetically modified foods.

On the consumer side, such debates can give rise to resistance to technological innovations in agriculture, and in this light organic food can be regarded as an alternative that is more safe (Halkier 1998; Solér 1997; James, 1993). While media coverage of food issues plays a central role in the establishment of particular kinds of discourse with regard to organic foods, access to scientifically based advice and know-how for producers as well as consumers is also important. Access to such knowledge varies to a great extent between countries. When interested in elucidating the consumer point of view, or addressing consumers as a focal point in projects of the present kind and in consumer studies more generally, it is crucial to consider the bases of knowledge from which consumers derive their criteria of assessment. This is a methodological issue, but it also tends to be a political one. When consumers are conceived as the driving force in market development or when they are sometimes referred to as 'political consumers', the character of consumers' knowledge of the issues must be elucidated.

It can be expected that the character of public discourse in any particular country will reflect the relative power and influence of particular stakeholders in the development of the organic sector in that country. As we have seen, the roles of stakeholders vary considerably from one region to another. Markets in Northern and Western Europe, where demand for organic products is greatest, are said to be consumer driven. But within this region there are considerable differences with regard to the roles played by distributors, not least major retailers, farmers and growers' organisations, international NGOs and national governments, ministries (of agriculture, environment and/or industry and commerce) as well as political parties. The development of organic sectors in Southern and Eastern Europe has been geared to a considerable extent to meeting this demand rather than that of domestic markets. Accordingly, wholesalers specializing in international distribution, international bodies concerned with the regulation and certification and national ministries of industry and commerce have played important roles in the development of organic sectors in these regions. It must be expected that these factors exert a different, but in each country significant, influence upon the character of the public discourse concerning organic foods and the particular values associated with their production and consumption. Differences between consumer conceptions of organic foods, criteria of assessment and concerns in this regard are likely to reflect the influence of these variable, contextual factors.

3.5 The four selected cases

Two of the four case studies presented in the following chapters, Denmark and the UK, are drawn from the north-western European region, while two, Italy and Hungary, are drawn from the south-eastern region. Some relevant similarities and differences between these countries can be highlighted briefly here in the light of this presentation of contextual factors.

Both Denmark and the UK are members of the European Union. Both are industrialised countries, less than 5% being employed in the agricultural sector, and in both cases that sector itself became rapidly industrialised during the second half of the 20th century. Both 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 considerable 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 establishment of certification procedures.

The organic sector in Denmark, however, is considerably larger in relative terms, whether this is measured as percentage of farms or of arable land. Moreover, levels of consumption of organic foods are also considerably higher in Denmark, whether measured as per capita sales or as percentage of all food sales. 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. Among the factors that have influenced this development are a generally high level of awareness of environmental problems among the population and the relative priority given to environmental policies. 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 by contrast is considerably larger in absolute terms, the population being approximately ten times bigger. This market constitutes a good example of a liberal market, according to which a variety of organic labels, none of which are state controlled, compete for the attention of consumers. It cannot be said that the consumption of organic foods constitutes a "normal" feature of everyday life for the majority, but rather that organic consumers constitute identifiable segments of the population. The level of demand

has been increasing rapidly since the mid-1990s and major supermarket chains have played a very significant role in this development in recent years. This is a market in which demand has long outstripped supplies from British farmers and growers, such that at least one third of the supply has relied 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, also a member of EU, 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. Italy is believed to have a potential for increasing the current level of organic production, as well as the demand for these products on the domestic market. As in the UK, the persistence of many competing organic labels is characteristic of this market. Hungary has been selected as an example of countries belonging to the central and eastern region of Europe and as an example of a country that as yet remains 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 and no Hungarian organic label, as such. Organic foods tend to be sold as health foods in specialised health food stores. The lack of a domestic market is partly attributed to limited purchasing power and relatively high premium prices. It is believed that Hungarian consumers remain uncertain about what the term ‘organic’ means.

4 Case I: Denmark

4.1 Production and market

4.1.1 Organic farming in Denmark

In international terms, Denmark has a relatively large farming sector. At present, 63% of its land area is cultivated farmland. It also has substantial agricultural exports, of which pork and dairy products are the most important. Organic farming accounts for approximately 6.5% of agricultural production.

Table 4.1: Organic production, Denmark

	Organic agricultural production:	Percentage of all agricultural production:
Number of farms	3525*	6.5
Total production area	173497	6.5
Total converted production area	131986	4.9
Average production area per farm	49.2 ha (organic farms)	50 ha (conventional farms)

Source: Danish Plant Directorate 2001
* 3604 farms in 2003

Organic production in Denmark today can be characterised as being both centralised and industrialised. One example of this is the expansion of the market for organic milk. In 1990, most organic milk producers merged into a single dairy cooperative, and today about 80% of all organic milk is delivered from one plant. Milk is one of Denmark's most significant organic products, about 20% of the milk sold in Denmark being organic (Fibiger Nørfeldt 2000).

The merging of producers and the expansion of supply of organic foods to supermarkets has presented consumers with a wider range of choice in the sense that they can now find organic variants of many food products. But in another sense, large-scale organic production brought about by the merging of producers can be said to have restricted choice. Taking the example of milk once again, many consumers of organic milk have no option but to buy their milk from the one leading dairy plant that is sold in most supermarkets. Regarding the issue of consumer preferences, this development is important because this single product has become representative of what organic milk is. Many consumers therefore have no opportunity to experience variations in taste or to assess other aspects of quality, such as the ethical character of different milk production systems. And those consumers who do have this experience or who might be critical of some aspects of the leading product often have no choice. In sum, the industrialisation of organic milk in Denmark means that Danish consumers do have access to organic milk, but at the cost of widespread reliance on a single product. Labelling policy and mass production can be said to have been preconditions of the rapid expansion of or-

ganic consumption in Denmark, but centralisation has simultaneously limited the range of products, varieties of quality and other values associated with food.

4.1.2 Regulation, policies and public discourse

State intervention and grassroots organisation

Government authorities and grassroots organisations have played an important role in the development of the organic sector in Denmark. The Danish Association of Organic Agriculture (Økologisk Landsforening) was established in 1981 with the aim of developing strategies for organic agriculture. With the advice of this organisation, the Danish government adopted a policy with regard to the regulation of organic agricultural production in 1987. State subsidies were granted to farmers converting to organic production and the term 'organic' was defined in accordance with these regulations. A national label, the 'Ø-label' ('Ø-mærket')[13], was introduced by the government in 1989.

The timing of this transition to a regulated organic sector has meant that awareness of the principles of organic farming among consumers, producers and politicians was established somewhat earlier in Denmark than in many other European countries, in which subsidies and other aspects of public policy with regard to organic farming were first introduced in the early 1990s following the adoption of EU regulation (EEC) No 2092/91 of 24 June 1991). Danish policy on organic production and consumption has since been formulated in two Action Plans (Strukturdirektoratet for Landbrug og Fiskeri 1995 and 1999). The first of these regarded financial support for conversion, regulation and control, the provision of advisory services and planning of information campaigns, education and research, as measures that would support increasing production, consumption and sales. The second plan also dealt with consumption and sales and with issues such as primary production, quality and health, exports, institutional and commercial kitchens, as well as environmental issues.

The 'Ø-label' guarantees that public authorities certify production, processing, packaging and labelling of organic products. Its criteria of application are based on EU regulations, but include some additional aspects that have not been addressed in EU policy. Every farm or business is inspected once a year by officials from the Danish Plant Directorate, 25% of farms being visited without prior notice. Regulation procedures cover the physical state of fields, barns and other buildings, and matters pertaining to the use of fodder, fertilizer, animal medication, and other issues.

The status of the Ø-label in Denmark is an important determinant of national patterns of organic consumption. Because it is state-controlled, and the only national organic label on the Danish market, it has been possible to promote a high level of awareness about and confidence in this label among Danish consumers. In one survey 83% replied that they were aware of the Ø-label (Danmarks Statistik 2000; Økologisk Landsforening 2002). In another, 80.9% said they were aware of the label (Beckmann, Brokmose and Lind 2001). But such awareness does not mean that consumers know precisely what the label stands for. According to the results of one of these surveys, 40% either did not know what the label stood for or merely knew that it indicated organic status (Økologisk Landsforening 2002). In spite of this, 61% trusted the label as used on products on the Danish market. It would seem therefore that many people trust this label without having much knowledge about the criteria governing its use. Following the success of the Ø-label, other actors in the organic sector, including organisations and retailers, have been reluctant to introduce private trade labels. The Danish Ø-label

[13] "Ø" stands for "økologi", which is the Danish word for "ecology" as well as for "organic production". The term "ecological" is widely used in the Nordic countries, while in Germanic and Latin European countries the term "Biologic" is most commonly used.

therefore brings a degree of uniformity to organic awareness and to the image of organic foods in Denmark[14].

Public Discourse

A relatively high level of awareness about environmental issues among Danes has contributed to the considerable demand for organic products and to a distinctive public discourse on organic issues. Denmark is a small country with a long tradition of agricultural cultivation. The environmental costs of intensive farming had become apparent to many Danes by the beginning of the 1970s. At that point in time, oxygen decline had been detected in Danish waters, and was attributed to nitrogen leakage from agricultural production. Throughout the 1980s, awareness of the negative consequences of traditional agricultural production grew, and was supported by increasing media coverage. Stories presented in the media concerned the neglect of animal welfare, the identification of pesticide residues in drinking water, drug residues in pork meat and chemical residues in wheat bread. Televised film showing the dramatically negative effects of industrialised egg production on the welfare of hens led to a correspondingly dramatic drop in the demand for these products. A decline in male fertility over the course of several decades had been documented, and extensive press coverage was given to some studies indicating that this development may be linked to the consumption of conventional foods as contrasted with organic foods. Growing uncertainty about the consequences of conventional food production and consumption led to an increase in the sale of organic products (Bjerre 1997; Økologisk Landsforening 1998).

At the educational level, relatively good educational opportunities for farmers – including a school for organic farming, opened in 1982 – and a comprehensive advisory and information system also contributed to an awareness of organic production among Danish consumers.

4.1.3 Distribution profile

Today large retail chains dominate the organic market in Denmark. About 70% of all organic food sales are made through supermarket chains and discount markets (O'Doherty Jensen *et al.* 2001; Økologisk Landsforening 2002:15). While one chain carries an assortment of more than 800 organic products, most discount chains in Denmark now carry both fresh and processed organic products. More than 80% of the Danish food retail market carries an assortment of organic fruit and vegetables. This trend can be explained by particular features of the expanding market for organic foods in Denmark.

The first organic supermarket sales occurred in the 1970s, but these were limited. Throughout the 1980s the range began to expand, but the organic market was still a marginal food market (Bjerre 1997). In 1993, one of the largest supermarket chains in Denmark launched a campaign that offered reduced prices on organic products. This was followed by television and newspaper advertisements, and this enhanced both sales and awareness of organic food products. Sales of organic foods in this supermarket chain doubled between 1993 and 1994 (Bjerre 1997; Økologisk Landsforening 1998). This marketing offensive is often claimed to have greatly influenced, or to have "kick-started", the organic market and organic consciousness in Denmark (Fibiger Nørfeldt 2000).

But supermarkets are not the only place in which organic foods are found in Denmark. About 30% are sold through other distribution channels, including health food shops, outdoor market stalls, farm shops and box schemes. Most big cities and larger towns have smaller health food shops. These accounted for about 15% of organic food sales by the late 1990s (O'Doherty Jensen 2001:22). One type of distribution that has become increasingly popular

[14] Besides the Ø-label there is the Demeter-label from the Organisation of Biodynamic Agriculture. They count 23 authorised growers. Some use the Demeter-logo, but many sell their products as organic using the Ø-label.

in that last five years is box schemes. One company has had particular success, and is now distributing organic food to about 25,000 customers per week (Odgaard and O'Doherty Jensen 2003). There are about 30 box distributors in Denmark. These vary in size from the smallest, making about 10 deliveries per week to 15 customers, to the large company just mentioned.

Discount markets have been seen as a threat to alternative distribution channels, but the latter do seem to have made advances nevertheless in recent years. However, it is difficult to estimate such sales. Income from direct sales is not always officially registered in the same way as supermarket sales, and may not therefore be fully reflected in official estimates of the organic market share. Another problem in obtaining figures on direct sales is that it is unclear what the term 'direct sales' stands for (Odgaard and O'Doherty Jensen 2003). To give an example, outdoor market stalls are often referred to as a direct sales channel, but many stall holders sell imported products and most sell products from other producers. This is often the case in Denmark, especially in the colder seasons, when the range of produce from an individual farmer is relatively limited. Similarly, many vegetable box schemes distribute imported goods. The largest box scheme company in Denmark can be described as a professional distributor since its products are produced by a wide range of Danish farmers and growers or are imported. This company does represent an alternative to mainstream sales channels, but whether it can be said to promote 'direct' links between farmers and consumers depends upon how that term is defined.

4.1.4 Developmental trends

The figures noted above indicate that the development of organic consumption in Denmark can be described as a process of 'normalisation'. This does not mean that the majority of consumers spend most of their food budget on organic foods, but it does indicate that the category 'organic consumers' is a heterogeneous one - much like the category "consumers in general". Danish consumers of organic food no longer constitute a distinct group that can be defined by specific attributes. Even though there are alternative distribution channels, the development of organic food consumption in Denmark has been structured primarily by features of the mainstream distribution system. These include centralised wholesale purchases and centralised marketing of the range of organic products carried by the major supermarket chains. The introduction of organic brands has been an influential marketing strategy within this system. It has led to reasonable prices for some product groups and a more stable supply, but also to a standardisation of the organic supply found in conventional food outlets. This development underlies purchasing criteria among Danish consumers, as well as their perceptions of quality and understanding of safety matters.

Future outlook

Within the last couple of years, optimism in the organic sector has been weakened somewhat. More sceptical and cautious attitudes have been expressed by the media and in literature on organic consumption (Økologisk Landsforening 2002:8; IFKA 2003). By the turn of the century, success stories in the organic sector had ceased to be newsworthy. The promotion of an 'organic' or 'environmentally friendly' profile no longer provided a competitive edge to any particular retail chain. Optimism was also affected by a slight reduction in sales figures. The market share of organic foods in the total food market decreased by 0,2%, falling from 5,1% in the first half of year 2000 to 4,9% in the first half of 2002 (www.okoland.dk 19.11.2002).[15] It has been pointed out that large retailers had stalled in their engagement with further development of the organic sector. Many had reduced their product range, and it had become more difficult for producers to sell organic products to supermarkets (Økologisk Landsforening 2002; Sall and Kjeldsen 2000). Research on the organic market is often preoccupied with this

[15] Another source reports that the market share of organic foods in Denmark in 2000 was 2,5 - 3% of total food sales (ITC: www.intracen.org)

issue. Attempts are made to find the reasons to this possible decline, to detect market barriers, and to predict future development.

Several changes might explain this tendency. On a practical level, farmers have been exposed to a reduction in subsidies and other incentives that were introduced during the early years of organic expansion. At the ideological level – i.e. the question of organic values and the extent to which these will influence the food market and the culture of consumption – changes in the organic sector are connected with larger food-political issues. There is an ongoing discussion among actors within the food system about responsibility for the future food market. Control has been increasingly taken over by the major retailers, but at the same time retailers claim that what is found on the shelves in stores is solely a response to consumer preferences. As we shall see, much research on organic consumption explores this claim by examining consumer preferences, consumer motives, and willingness to pay.

Regardless of these changes, however, it can be argued that talk of a decline in the organic market is premature. Firstly, as mentioned above, there has been an expansion of alternative distribution channels, and this can be seen as a sign that demand exists (The Danish Consumer Council website). Secondly, the perspectives put forth by the media in recent years tend to reflect the voices of conventional distributors and of the food industry. Positive trends are reported more rarely. Thirdly, it was always likely that the relatively quick expansion that the organic sector in Denmark underwent from the beginning of the 1990s might be followed by a temporary stagnation. Lastly, it should be noted that the most recent figures regarding consumer demand for organic products indicate that demand levels in 2003 are once more increasing (www.okoland.dk).

4.2 Organic consumption

4.2.1 Research on consumers and organic foods

The review of consumer studies in this section covers the studies listed in the table below and articles referring to these studies. Years in square brackets refer to the year of data collection.

Each year the Danish Association of Organic Agriculture (Økologisk Landsforening 1998-2002) prepares a report based on work of their own and others, as well as on data from a market analysis company, which collects data on purchases in 2100 households each week. The latest of these reports has been included in this review.

Another report is prepared annually by IFKA (Institut for Konjunktur-Analyse). This is not focussed on organic food, but it is an overall assessment of the population's attitudes, plans, behaviour and expectations. It includes questions on organic consumption and attitudes.

Two larger studies have been made, since 1995, by Wier and Smed (2000) and by Beckmann, Brokmose and Lind (2001). Both of these are mainly based upon quantitative data, and both attempt to identify factors that lead some consumers to choose organic products as well as barriers affecting the purchase of organic food.

Table 4.2: Empirical studies, Denmark

Source	Method	Participants/respondents	Objective
Beckmann *et al.* 2001 [1999/2000]	Survey, telephone interviews supplemented by focus group interviews	1500 consumers (1313 buy organic foods) 3 focus group interviews	Attitudes among consumer segments. Socio-economic factors, consumer values and environmental consciousness
IFKA 2000-2003	Survey, telephone interviews	1100-1200 consumers (general population)	General questions about Danish values
Squires *et al.* 2001 [1998]	Survey	144 respondents Random customers in supermarkets and a health food shop (respond rate: 45%)	The relation between demographic factors, motives and consumption intensity (comparative study with New Zealand).
Thøgersen, John 1998 [1995]	Survey, telephone interviews	144 respondents	Consumer behaviour when purchasing organic foods.
Wier and Smed 2000 [1997-1998]	Econometric estimation based on household survey	2000 households approximately	Socio-economic factors influencing the purchase of organic food. Quantification of "willingness to pay" and analysis of consequences of price changes.
Økologisk Landsforening 1998-2002	Consumer scan supplemented by results from various studies	2000 households approximately	Overall yearly report on organic consumption and consumers.
Økologisk Landsforening 1998a	Focus group interviews	4 groups with 10-12 participant in each	Attitudes to organic food products.
Økologisk Landsforening 1998c	Survey, telephone interview	600 consumers (general population)	Consumers' knowledge and sources of information in relation to food purchase choices

Since 1995, two reviews of the literature on organic consumption have been undertaken. One, by Wier and Calverly (1999), deals with consumer preferences and was undertaken with the purpose of assessing the potential of the domestic and export markets for organic products in Denmark. The other, by O'Doherty Jensen *et al.* (2001), is part of a review regarding organic foods and human health. Its authors summarise a range of studies of consumer preference and attempt to bring the results of these studies into critical focus by highlighting the assumptions and methodological bases of the studies.

Table 4.3: Reviews of the literature, Denmark

O'Doherty Jensen *et al.* 2001	A review of the literature regarding organic foods and human health: Market actors, consumer characteristics, frequency of purchase, the influence of organic consumption on diet composition and upon experienced quality of life
Wier and Calverly 1999 [1997-1998]	Determining factors for organic consumption and estimates of market potential: Consumer characteristics, frequency of purchases, willingness to pay, Producer-consumer-retailer relations

4.2.2 Purchasing behaviour

Most of the studies mentioned above have attempted to measure the frequency of organic purchases by consumers. The overall trend in Denmark is that many more people buy organic foods at least once in a while today than they did ten years ago. In 1990, 70% of the respondents in one study said that they never bought organic food. In a study from 1999, 13% gave this reply (O'Doherty Jensen *et al.* 2001:24). These figures can be taken as indicating a trend, but precise figures do differ significantly from one study to another. Thus, recent estimates of the number of people who never buy organic food range from 7% (Økologisk Landsforening 2002) to 30% (Statistics Denmark 2002). These variations occur because of differences in method, sample size and question formulation.

Table 4.4: Buying frequencies, Denmark

Source	Buying frequencies
Beckmann *et al.* 2001 [1999/2000]	28% have little experience of buying organic foods 50,3% have some experience buying organic foods 21,7% have a lot of experience buying organic foods
Statistics Denmark 2002	30% never buy organic foods 70% buy organic foods at least sometimes - 60% always or sometimes buy organic dairy products - 60% always or sometimes buy organic produce - 40% always or sometimes buy organic meat
Fibiger Nørfeldt 2000	25% never buy organic foods 75% have bought organic foods within the last 6 six months - 1-2% always buy organic foods - 24% use 2-10% of household budget on organic foods - 10% use more than 10% of household budget on organic foods
IFKA (2003) [2002]	48% have bought organic food products within the last week About 25% of the population have bought products from three or more product categories within the last week ("core-consumers")
Wier and Calverly 1999 [1997-1998]	75%-80% of Danish consumer have bought organic foods - 22% buy often - 8% buy almost always when possible - 1-2 % consistently buy organic Estimate: 43-45% are potentially frequent consumers
Økologisk Landsforening 2002 [2001]	7% do not buy organic foods 87% have bought organic foods at least twice during previous year (2000) 52% are "light-users" (use up to 2.4% of the food budget on organic foods) 28% are "medium-users" (use between 2.5 and 9.9% of the food budget on organic foods) 13% are "heavy-users" (use minimum 10% of the food budget on organic foods)

With regard to purchasing frequencies for specific products, it is found that organic milk is the most popular organic purchase. In one survey, over 90% of the consumers who buy organic food from various product categories each week had bought dairy products within the previous week (IFKA 2003). Other organic products with a large market share are wholemeal flour (22%), oat grain (18%), eggs (13%), carrots (11%) and wheat flour (11%) (Fibiger Nørfeldt 2000).

4.2.3 Consumer characteristics

The socio-demographic characteristics of consumers of organic foods have been described in a wide range of consumer studies. General trends are that these consumers tend to live in urban areas, to belong to younger population groups and to have relatively higher levels of education. The findings with regard to gender and income present a less clear pattern. Some studies have identified an over-representation of women and higher income levels. But, consistent with the fact that income is a poor predictor of food choice in industrialised countries, it has also been found that lower income groups are also well represented among consumers of organic foods. To what extend an over-representation of women, as found in some studies, reflects their greater acceptance of organic values or their role in shopping for family food remains unclear at present These trends have been identified in earlier studies undertaken in Denmark as well as elsewhere (O'Doherty Jensen et al 2001).

As already pointed out, it makes little sense to try to identify the socio-demographic characteristics of consumers of organic food, as such, when that group has grown to be a large and heterogeneous group that is almost identical with the population as a whole (Beckmann *et al.* 2001:245; Økologisk Landsforening 2002:6). However, the general picture can be supplemented by some recent findings. It is found that consumption in Denmark remains to some extent an urban phenomenon. Higher sales figures are concentrated in the capital city of Copenhagen and in the second largest city of Århus. Some suburban and other municipalities surrounding the capital also show higher sales figures than do rural areas in the rest of Denmark (Coop Danmark 2002, Wier *et al.* 2000, Økologisk Landsforening 2002). It is not cur-

rently known to what extent this tendency reflects geographical differences in food culture or difference between urban and rural areas with regard to the availability of organic products.

The indications are that higher frequency of consumption remains correlated with higher educational levels. Consumers of organic foods have been described in some recent Danish studies as "intellectuals", that is to say, they tend to read more newspapers, buy more books and use the Internet more than the average among consumers in general (IFKA 2003, Økologisk Landsforening 2002).

Beckmann inclines to the view that the over-representation of women identified in some studies is due to a sampling bias, reflecting the fact that more women than men take care of the daily groceries rather than reflecting gender differences in food choice (Beckmann *et al.*2001). However, given the fact that gender differences in food choice are very well documented in the sociological literature more generally (O'Doherty Jensen and Holm 1999), this issue should be regarded as remaining unresolved at present. Some studies have also indicated that women with children buy more organic products than do other families. Whether this is also an effect of age is not clear (Wier *et al.* 2000; IFKA 2003). Significant or not, it may suggest that health considerations play a role in these consumers expectations with regard to organic foods. It also means that the question as to who actually consumes the food, as opposed to who makes the purchases, has a bearing on the choice to buy (or not buy) organic products (Økologisk Landsforening 2002).

Some studies differentiate consumer types or segments based on analyses of socio-demographic variables, value orientation and/or purchasing behaviour. An example of categories defined by purchasing behaviour is the differentiation between "heavy users" (20% of the Danish consumers buy 80% of organic products), "medium users" and "light users" (Jensen 1999). Two examples of segmentation that include value orientations are, first, the differentiation of "the engaged", "the impulsive", "the conservative", "the traditionally engaged", "the eco-healthy" and "the exploitative" (Økologisk Landsforening 2002; www.foodfocus.dk); and, second, the differentiation of "the uninterested green", "the sceptical green", "the theoretical green", "the practical green" and "the evergreen" (Beckmann *et al.* 2000).

Most segmentation analyses are undertaken with a view to providing guidelines for marketing. Some are based on regular updating of empirical data, year after year. They can serve as helpful marketing tools insofar as results are presented in a qualitative form that distinguishes 'kinds' of consumers, apart from offering quantitative data regarding 'lifestyles', that is to say, socio-demographic characteristics, purchasing patterns and value orientations of consumers categorized as belonging to any given segment. For these reasons, any given analysis may prove to be more or less useful for marketing purposes. The segmentation process itself typically rests on a somewhat complex form of statistical analysis, which in turn rests on methodological premises selected for the purpose at hand. These premises are rarely subjected to any explicit critical examination, however. The uncritical use of such analyses may therefore yield any number of inferences regarding relationships between 'kinds of consumers' and 'kinds of motives' that are not validated by the empirical data. Some limitations of these analyses have already been discussed in the previous chapter.

To sum up, it can be said that organic consumers in Denmark today constitute a large majority of all consumers rather than a population group defined by particular characteristics. It is also clear that purchasing patterns vary significantly. Danish consumers of organic food include a relatively large group of consumers who are not frequent buyers and who purchase their products through mainstream sales channels. Among these, it would seem likely that motives leading to occasional purchase of organic variants may neither be explicit nor built upon any carefully considered and consciously defined reasons or values. It is also likely that the significantly smaller group of consumers who frequently buy organic foods do so on the

basis of more explicit and consciously held values and concerns. Consumers representing the latter group are those described in the literature as "heavy users" or "radical organic consumers" (Squires 2001; Grunert 2001; Økologisk Landsforening 1997; IFKA 2000 and 2003). This distinction indicates that we are dealing with different types of consumer orientation and very different responses to practices in the food system.

4.3 Consumer concerns

Consumer concerns with respect to the purchase and consumption of organic food are highlighted in a number of studies that have been designed to identify buyer motives. The results of these studies are presented in this section.

Environmental concern and health are identified as the two issues that concern most consumers. Animal welfare is also identified as a widespread concern, while many consumers appear to accord somewhat less priority to the taste and eating quality of organic foods as their stated reason for preferring these foods. A number of more specific concerns among greater or smaller sectors of the population have also been identified, as we will see.

In presenting the results of these studies, it should be borne in mind that different studies have posed different questions and that different study designs and methods of data collection have been used. For instance, the highlighting of environmental concern in one study may reflect the fact that consumers are more concerned about environmental issues than other issues. But it is just as likely that this result is a function of a decision to employ closed rather than open questions in designing a questionnaire. Again, the absence of animal welfare or any other particular issue in a given study does not necessarily mean that consumers are not concerned about this issue, since it may not have been explored. In comparing results and seeking to gain an overall picture of consumer trends, it is therefore important to be aware that the conclusions of these studies rest upon methodological decisions, that much research in this field has been designed for marketing purposes and that the research itself is at an early stage of development.

Table 4.5: Consumer concerns, Denmark

Survey	Concerns
Beckmann *et al.* 2001 [1999/2000]	44,7% mention health 39,2% mention the environment/nature 24,8% mention animal welfare 17,1% mention sensory features (taste etc.) 6,3% mention political correctness 3,5% mention GM foods 23,5% mention other factors 8,1% don't know
Danmarks Statistik 2002	Among those who buy organic products, it is of great importance that the products: Are good for the environment: 74% Are better for animal welfare: 73% Are healthier: 59% Taste better: 38%
IFKA (2003) [2002]	Consumers who plan to buy more organic foods within the next three months are more concerned with pollution and with the quality of the food than are consumers in general. Among a household sample of 1100, 22% are concerned about the quality of food. Among these, what concerns them is: 52% mention that they are concerned about additives 25% are concerned about chemicals used in production 12 % mention the quality of the products 12 % mention gene modification 12% mention food pathogens/zoonoses such as BSE
O'Doherty Jensen *et al.* 2001	Health and/or environmental motives are mentioned most frequently. Then comes concern about ethics and quality.
Wier and Calvery 1999 [1997-1998]	Consumers who often buy organic food are more concerned with the environment. Consumers who sometimes buy organic food are more concerned with health reasons.

	Wier and Calverly detect a tendency that health is an increasingly important motive for buying organic food, and that environmental concern is decreasing. They claim that this trend indicates that motives are directed more towards the product itself, and less toward the process.
Økologisk Landsforening 1998c	65% are very concerned about chemical residues in their food 63% are concerned about medicine residues 59% are concerned about growth hormones 45% are concerned about GM foods

Health and environmental concerns

It is not possible on the basis of existing studies to give a clear account of the relative importance of environmental and health concerns, respectively. This is partly due to the fact that these concerns are often interrelated. Thus, a concern with pesticides may express a health concern with regard to ingesting pesticide residues or an environmental concern about the contamination of ground water. The latter may in turn give rise to health concerns in the longer term. But it is also due to the fact that when these concerns are distinguished and measured separately for the purpose of investigation, different questioning techniques are often employed. These can yield results that reflect differences in the survey methodology employed rather than differences among consumers as such.

In a survey undertaken by Statistics Denmark in 2002, the 70% of the population who buy organic food always or sometimes were asked to rank the importance they attribute to the environment and to health, respectively. Using closed questions, in which fixed answer categories distinguished degrees of importance, 74% responded that environmental concerns were important or very important, while 59% attributed similar degrees of importance to health (Danmarks Statistik 2002). The results of another survey indicated, however, that relatively more importance is attributed to health (Beckmann 2001). In response to an open question, 45% of consumers who buy organic foods mentioned health as a motive, whereas 39% mentioned concerns about the environment or nature.

Most studies (in Denmark and other industrialised countries) as from the later 1990s identify health as the motive that takes precedence over concerns about the environment and animal welfare. Wier and Calverly conclude on the basis of their review of existing studies that increasing importance has been attributed to health as a motive for purchasing organic foods (Wier and Calverly 1999 and 2002). They differentiate three groups of consumers: (a) a relatively small group of "idealistic consumers", for whom the environment is important, (b) prestige oriented and materialistic consumers, who give precedence to taste and quality, and (c) the relatively largest group, who buy organic foods for health reasons. The small percentage of idealistic consumers (10%) display higher purchasing frequency, whereas the larger group that is motivated by health buys organic food less frequently.

Wier and Calverly conclude that there is a general tendency whereby consumers of organic food are more concerned with product advantages that benefit them directly than with the production process behind them (1999, 2002). However, not all observers have drawn this conclusion. It has been pointed out that health concerns with regard to food can be interpreted as an expression of increasing distrust of industrialised agriculture (Thulstrup *et al.* 1999). In their review of the literature, and with reference to consumer studies regarding food safety, O'Doherty Jensen *et al.* conclude that there is more empirical support for the latter view than for the former (2001:28). With regard to health, they make the point that this is a widespread concern among all consumers. In accordance with the trend whereby more and more Danish consumers became incidental buyers of organic foods throughout the 1990s, the category of 'organic consumers' therefore came to include greater numbers who attributed importance to health as a reason for buying organic food. On this view, survey results should not be interpreted as documenting a swing from concern with the environment to a concern about health throughout the 1990s.

Consumers who buy organic foods for health reasons do not necessarily know or believe that organic foods are healthier. For some it is a cautious behaviour stemming from insecurity about the impact of conventional food production and handling. The health aspect might also be connected to matters beyond the product and the consumer, relating what is healthy for a human being to what is healthy for animals and the environment. The two motives are therefore interwoven (Økologisk Landsforening 2002:10).

A further twist to the question of whether people are primarily motivated by concern with themselves ('individual' or 'egoistic' value orientation) or with wider societal issues ('altruistic' value orientation) is found in a study by Squires *et al*. (2001). They focus on the character of environmental reasoning and ask which kind exerts most influence on purchasing decisions. They find that what they call "green self perception" (that is, when people understand themselves as being environmentally friendly consumers) is more important than general concerns about environmental issues, such as global sustainability. On this basis, they propose that "... organic food consumption stems from an ideology of green consumerism and associated readiness to act rather than from a specific measure of concern about general environmental issues" (p.403).

A point of particular interest here is that even though Wier and Calverly on the one hand, and Squires *et al.* on the other hand, emphasise different motives, the issue of individualization is raised in both studies. The former do so in the sense that products that benefit *me* are in focus, the latter in the sense that consumers seem to be guided by personal and self-acknowledged ideologies of consumption. In both studies these statements are only tentative, but they are nevertheless quite relevant for our purpose. They lend further support to the view that spontaneous responses to survey questions regarding health and the environment, respectively, do not readily yield much insight into consumers' concerns about organic food. It could be expected that consideration of these aspects in the light of sociological theory of individualism and consumerism would contribute to the interpretation and understanding of these empirical data.

Another approach is simply to avoid the problems connected with complex concepts, such as those of 'health' and 'the environment' or 'individualism' and 'altruism'. This can be done by confining investigation to more concrete issues — for example, by asking more specific questions about matters of concern such as pesticide use. Examples of this appear in studies undertaken by IFKA (2003) and Økologisk Landsforening (1998c). In the latter, 65% mention that they are concerned "to a high degree" about chemical pesticides, 63% worry about medicine traces, 59% worry about food pathogens, and 59% are concerned about growth hormones in food. This study is one of few that include the issue of packaging in its questionnaire. It is found that 44% of respondents expect wrapping to be labelled and environmentally sound, or that only a minimum of wrapping should be used with respect to organic foods. These findings are summarised in the statement that chemical residues from the production process are what concern respondents most, while food additives are the element that concerns respondents least. This may reflect the fact that the declaration of additives on packaging is demanded by law, whereas chemical residues are impossible for the consumer to detect. Consumers may feel that they have a choice concerning additives but have less control when it comes to chemical residues.

The results of IFKA's study (2003) present a different picture of the priority accorded to additives and chemical residues. In this study, 52% mentioned that they were concerned about additives, while 25% were concerned about chemicals used in production processes. Whether this discrepancy is due to changes in the population's concerns about food between 1998 and 2002 or to methodological factors cannot be determined on the basis of these two surveys. What is interesting in the present context is the way these two studies pose questions in more concrete terms rather than investigating undefined categories of 'health' and 'environment' as

motives in food choice. In this context, the extent to which anxiety about the use of pesticides is related to concerns about individual health, family health or the environment remains an open question. It should be mentioned that in both studies respondents are not necessarily consumers of organic food, the population comprising consumers in general.

In summary, then, there does seem to be an overlap between consumers who are concerned about the quality and safety of food, who are concerned about the environment, and who purchase organic foods. Many people also buy organic foods believing that these products offer a reduced risk to health. There are also strong indications that these motives are intermixed and interrelated (Økologisk Landsforening 2001; O'Doherty Jensen *et al.* 2001).

Animal welfare

In surveys conducted by Statistics Denmark the issue of animal welfare has emerged as a widely endorsed factor in organic food purchases (Danmarks Statistik 1999-2003). Recent results indicate that 73% of consumers include animal welfare among their reasons for buying organic food (Danmarks statistik 2003). In another study, however, Beckmann *et al.* (2001) found that only 25% of respondents included animal welfare among their reasons for buying organic foods. The discrepancy between these results is partly due to questionnaire design. While Beckmann *et al.* employed open questions, fixed reply options were offered in the surveys undertaken by Statistics Denmark. It is also noteworthy that investigations of consumer concern with ethical issues in regard to food have very largely been confined to the single issue of animal welfare only.

Taste and quality

Results regarding consumer conceptions of the taste and eating quality of organic foods are scant. There are indications that consumers have found organic produce in supermarkets to be of poorer quality than conventional produce. This tendency as identified in earlier studies may reflect the limited supply and turnover in supermarkets during the 1980s and early 1990s. More recently it has been found that consumers expect the quality of organic food to be at least as good as that of their conventional counterparts (Økologisk Landsforening 2001:19). The impact of quality on consumer decisions certainly needs to be investigated further, and in this context distinctions need to be made between different product groups and degrees of processing, as well as different production sources. Today, when fresh produce and products that have undergone different levels and kinds of processing are delivered from large industrial plants and from small independent producers, farmers and growers, studies of consumer expectations with regard to quality need to pose a differentiated set of questions and to distinguish a range of food categories. Meaningful and valid results could not be based on the assumption that all products can be subsumed under the category of 'organic food' for the purpose of measuring consumer expectations, preferences or concerns with respect to quality.

Fraud

Distrust with regard to food in general is relatively widespread among Danish consumers, especially among families with children (Berg 2000). One in five consumers fear that fraud plays a role in the market for organic foods. Their distrust is directed mainly at imported foods and private labels. It is a common finding of consumer research undertaken in a range of countries that consumers tend to place more trust in foods that are produced and sold on the domestic market than they are prepared to place in imported food products.

The issue of trust is handled differently in different countries (Økologisk Landsforening 1998a; Grunert 2001). In Denmark, the national ø-label plays a very important role in trust management. It is found that about 85% of people trust the national label (Fødevareministeriet www.fvm.dk), while private labels are not as widely trusted. The reason for this appears to be a suspicion that such labels are solely introduced with a view to increasing profit (Økologisk Landsforening 1998a). But it is found that even the national label is trusted more when

it appears on Danish products than when it is granted to imported products. This might indicate that Danish consumers do not tend to worry about fraudulent practices with respect to organic foods so long as production is controlled by the Danish authorities. But the issue of fraud, and concerns about fraud in relation to organic foods, remain largely unexplored at present.

Distrust, and more generally, food likes and dislikes, are influenced by the consumer's feeling of control over his or her food (e.g. fat intake) or lack thereof (e.g. GM foods or foods containing pesticide residues) (Wandel and Bugge 1995). Fundamentally, this issue regards the right of access to information that can yield a basis for choosing between food products. Many consumers would like more information about their food, and a shortage of information may very well promote situations in which consumer expectations with regard to organic foods are not matched by reality.

Indeed, another issue connected with fraud and trust is that of potential and actual disparity between the real conditions of production, processing or distribution on the one hand and consumer expectations on the other. The discovery of such disparities on the part of consumers may be perceived as a kind of fraud, and would almost certainly tend to undermine confidence. It was mentioned earlier (Section 5.2.) that Danes' trust in state certification is not dependent on their knowledge about certification criteria. But whether people have this kind of knowledge or not, they nevertheless have expectations, and it seems that distrust arises when these expectations are not met. This gap between expectation and reality has been examined in one study (Økologisk Landsforening 1998a). Using the qualitative method of focus group interviews, researchers were able to reveal instances in which generally presumed realities did not conform to the facts. For example, consumers assumed that organic products are free from chemical fertilizer and pesticides. Participants were astonished to find that it is possible to obtain a dispensation to use pesticides on organic products and that this need not be declared on the product. Another example had to do with information about the origin of products, which was judged to be a very important issue by the participants. Many were startled to discover in the course of the interview that organic flour, carrying a Danish brand name and the Danish Ø-label, was in fact processed from grain that had been imported to Denmark.

Other studies indicate that consumers have expectations about the positive effects of organic production on the environment, and about health, taste and animal welfare that do not accord with reality (Grunert 2001). If these expectations are not met, distrust and a less positive attitude towards organic food in the longer run may result. This study made the point that one of the measures for promoting the organic market is to ensure that consumer expectations are met to some degree. It is argued that decision makers in the organic food sector should be cautious with regard to industrializing organic production and the organic market, because the demand for organic food stems from a dissatisfaction with mass production and mainstream trends in the conventional food system (Grunert 2001).

Preferences related to product types

One qualitative study has tried to identify preferences relating to specific products (Økologisk Landsforening 2000, 2001). It was found that people who buy fresh organic produce and organic grain do so mainly because of concern about the use of chemicals. Better quality is mentioned in relation to the choice of organic fruit, and these consumers also had a preference for fruit and vegetables that had not been subjected to forced ripening (Økologisk Landsforening 2001, 2002). This criterion might be of considerable importance to some consumers in Denmark, where fruit and vegetables are often sourced from abroad, especially in winter.

With regard to the purchase of organic meat, concern about animal welfare and fear of pathogens such as BSE and Salmonella, were identified as important concerns. Organic eggs were

chosen mainly with reference to concerns about animal welfare (Økologisk Landsforening 2002), but also because consumers found that they had a better taste.

The fact that the largest market shares are in less processed foods is emphasised in this study. It has been found that consumers regard reduced processing as being more harmonious with organic ideals (Økologisk Landsforening 2000, 2002). This is an issue that also calls for further investigation. Other interpretations include the possibility that processed foods often carry residues of non-organic ingredients, that ingredients of highly processed food products are relatively less transparent, that processed foods are often imported, and that less processed or unprocessed foods happen to be the organic products that are more easily available, i.e. milk, eggs, carrots, flour and oatmeal.

4.4 Main findings and future approaches

This review of studies of organic consumption in Denmark has queried the reliability of the available survey data on a number of points and indicated the paucity of research regarding a number of issues that appear to be significant. Many of these studies have been designed to assess market potential (Økologisk Landsforening 1998, Wier and Calverly 1999). Their focus regards: who buys, what they buy, how often they buy, their willingness to pay and the declared motives behind this behaviour. These studies throw little light upon the social contexts in which products are used, and with reference to which purchases are made. Instead, they are based on the assumption that the measurement of declared motives enables prediction of purchasing behaviour. The results of these studies do not therefore yield an in-depth understanding of consumer concerns with regard to food or of motives for purchasing organic foods. They are not based on the recognition of the complex range of factors affecting food choice in everyday life. These include normative demands within a particular food culture, the availability of products and product information, household size and household resources of income, time and culinary skill. Food choice is often the result of compromises made in the social contexts of everyday life rather than a reflection of declared preferences or policies (Holm and Kildevang 1996). For these reasons, future surveys should be complemented by further research using qualitative methods of data collection and analysis.

We will now leaving aside the question of how consumer concerns might be ranked in terms of the relative degree of importance attributed to each concern or in terms of the number of consumers who express that concern. On this basis, it is possible to summarise the findings of the available research with regard to the character of the concerns expressed by Danish consumers of organic foods.

With regard to eating quality, it would seem that:

- Similar parameters are employed by consumers in their assessments of organic and conventional foods
- Some consumers perceive some organic foods as having a better taste than their conventional counterparts, and this constitutes one reason for preferring organic variants

With regard to other aspects of quality, importance is attributed to:

- Environmental effects of agricultural production
- Attention to animal welfare in agricultural production
- Effects of production, processing and products on human health/quality of life
- The production and sale of foods within the domestic market, as contrasted with imported products
- The use of environmentally friendly packaging and the reduction or elimination of unnecessary packaging of food products

With regard to safety, worry and fear are expressed in regard to:

- The use of chemical pesticides in agricultural production
- The use of medicines in animal production
- The use of growth hormones in animal production
- Food pathogens of significance for human health
- The possibility of GM contamination of organic products and the introduction of GM ingredients in processed foods

With regard to the right to information, importance is attributed to:

- Full information as a basis for informed choice, regarding: ingredients, product origin, methods of processing and methods of production

This review has also highlighted a number of issues that appear to be significant, but remain relatively unexplored. Among these are:

- The need to document the character of fears of fraud among potential and current consumers of organic foods, as well as the bases of distrust directed towards organic products.
- The role played by relative levels of processing in consumer assessments of organic products within the same product group, as well as the role of processing in the actual selection of specific variants with specific regard to their contexts of use
- Consumer responses to and assessments of a broader range of ethical issues related to food production, processing, distribution and marketing
- Consumer assessments of 'industrialised' production methods in organic and conventional agriculture and of 'industrialisation' as a basis for disenchantment or distrust
- Consumer assessments of 'mass production' of products by the food industry and of 'mass production' as a basis for distrust in the industry and its products
- Consumer assessments of mainstream distribution channels within domestic and international markets and of these channels as a basis for distrust of wholesalers and retailers and their products
- Reasons why some consumers purchase organic foods through 'direct' sales channels, while others do not
- Consumer expectations with regard to the characteristics of organic production, processing, distribution and marketing as compared to conventional/mainstream counterparts
- Consumer demands with regard to the issue of traceability

In the light of suggestions made in the available literature, and in the light of the range of currently unexplored issues, it would seem fruitful to avoid basing future research on the assumption that all consumers of organic foods in a mature market are members of a homogenous 'mass market', the needs of whom can be addressed and met through conventional, mainstream sales channels. For this reason, attention should also be given to niche markets and to the consumer concerns and demands, which support them – not least with respect to the sale of organic products.

5 Case II: United Kingdom

5.1 Production and market

5.1.1 Organic farming in the UK

In the UK, there has been organic farming since 1930s (Sir A. Howard), while what can be described as a coherent organic movement emerged in the UK in the 40's, and led to the establishment of the Soil Association, now the leading organic association in the UK, by Lady Eve Balfour in 1946. The Henry Doubleday Research Association (HDRA) was established in 1954 and provides information and advice about organic horticulture, where they are mainly dealing with hobby gardeners, although they do also deal with commercial growers.
But according to Mayfield, Holt and Tranter (2001), it was not until the early 1980s, that the potential conflicts between farming and the environment rally came onto the political scene. In the 1980s, there were introduced a series of agri-environmental schemes, but no policy was aimed specifically at organic farming until after the 1992 CAP reforms and the European regulation 2078/92 when an agreement was made by all Member States to support organic agriculture. Thus, it was not until 1994, that the organic scheme was realised in the UK (Mayfield *et al.* 2001).

The UK organic market is highly dependent on imports to satisfy market demand for most commodities. Despite increase in UK production, level of import increases. In 1999-2000, 75% of organic food was imported into the UK (Soil Association, 2000). The distribution of import of different product types is given in the table below.

Table 5.1 Import of different product types, UK

Product type	Per cent import		Source
	Year:	*Import:*	
Fruit and vegetables	2000	85%	Soil Assoc. (2001)
Cereals		50%	Mayfield 2001
Dairy products	1997	10%	Mayfield 2001
	1998	30%	
	1999-2000	40%	Mayfield 2001
Meats		40%	
Eggs	2000	Self sufficient	

Imports of dairy products are mainly from Sweden, France and Germany (Mayfield *et al.* 2001). The imported dairy products are especially used for making cheese and yoghurt, while liquid market was met with domestic production. Regarding meats, there are large differences between different types of meat in the level of import, for instance is 17% of beef imported, while lamb is mostly domestic. In 1999 UK producers took a 95% share of the retail market for organic meat. "*Despite constraints (...), there is a growing opportunity for UK producers to expand into organic farming to meet ready market*." (Kirk and Slade 2001).

The export of organic products from the UK is described as negligible. Salmon and mushrooms (Mayfield *et al.* 2001) and some multi-ingredient processed foods are exported (organic-europe.net). The UK is characterised by an industrialised production as well as market. In general, about 2% of the UK population is employed in agriculture, but 14% rely on it indirectly for a significant proportion of their income (Caroline Cranbrook 1998 in Nordberg-Hodge 1999).

In the UK, there has been an increase of 1,7% in development of agricultural area under organic production from 1993 to 2000. In 1993, 30 992 hectare was organically produced, while in 2000, this area had increased to 527 323 hectare (SÖL 2001; Lampkin 2001 in Hamm, Gronefeld and Halpin 2002). The very rapid increase in organic farming land in the UK has mainly been unimproved grassland; thus its proportion has increased from 42% in 1999 to 70% in 2000. Its relatively low productivity has meant the increase in organic production has been slower. Fruit, vegetables and cereals make up over 50% of production, although other sectors (mainly dairy and meat) are growing faster. The distribution of farms in the UK, very much follows the current distribution of grassland based farms in the UK, with most organic farming in the Southwest and Scotland, followed by the Midlands, Wales and the South (Mayfield *et al.* 2001). According to the Soil Association (2000), Northern Ireland has the smallest scale of organic production, and Scotland and Wales have the highest rate of conversion.

In 1999, organic production constituted 1.2% of total agricultural land, and 0.7% of the farmers were farming organically. According to numbers from country reports in 2001[16] the organic production in the UK is slightly below 2%, while organic food exceeds 5% of the total market (Holt *et al.* 2002).

In the UK, a number of farmer-owned co-operatives, marketing groups, specialist cereal millers, grain traders, and specialist vegetable pack houses exist, mostly supplying multiple retailers. The organic sector in Ireland is also moving in this direction with the formation of producer groups, such as the North West Producer Group, to provide technical support and market information, and to build horizontal links across the supply chain. However, unlike in the UK, a significant number of these groups have taken the initiative to retain independence from supermarkets by selling direct to the consumer. Producers are thereby aiming to retain profit margins whilst keeping retail prices competitive (Mayfield *et al.* 2001).

There are many processors of organic food in the UK. Over 5 500 businesses (producers and processors) were participating in the organic sector in 2000 (DEFRA, 2001 in Brown 2001). The number of processors has doubled to 1100 between 1998-2000. This has been aided by the rapid growth in availability of organic ingredients and has resulted in a proliferation of processed organic foods (Mayfield *et al.* 2001). Fruit and vegetables are the major groups of food eaten organic in the UK, while in many other countries, dairy products have been drivers.

Most organic processors produce conventional as well as organic foods, and are small scale and fragmented, but with recent entry of some major established food manufacturers the sector stands to make efficiency gains (O'Carroll 2001). Two typical routes by which well-known food manufacturers have entered the organic market: 1) by purchasing a specialist company branded differently to the parent company (Examples: Seeds of Change is a subsidiary of Mars, and Unliever moved into organics with the purchase of a majority share in the Scottish company Go Organic Ltd.), or 2) by introducing organic versions of a well known branded product (Example: Nestlé launched organic Nescafé) (O'Carroll 2001).

[16] Data from the EU 5th framework project QLRT-1999-31112 presented at the UK Organic Research Conference 26-28th March 2002 in Aberystwyth, organised by the Colloquium of Organic Researchers.

As organic products move further into the mainstream in many European countries, some multinational companies, Nestlé, Heinz, Del Monte and Danone, have now entered the market with organic lines that compete with conventional lines manufactured by the same company. (Mayfield *et al.* 2001). For example, Heinz launched an organic range of processed foods including baked beans in 2000 (IGD 2001 in Brown 2001).

There has been a rapid expansion in the number of organic lines available to the consumer - for example, the supermarket chain Waitrose had a product range of over 1200 items (IGD 2001 in O'Carroll 2001). There is currently a shortage of organic fruit, vegetables and cereals/grains for further processing. New forms of intermediation, such as B2B websites are developing to link organic processors with organic ingredient suppliers (O'Carroll 2001).

Currently, demand for organic produce is growing faster each year (40%) than supply (25%) in the UK. The largest sector is fruit and vegetables with 44% of the market share, although cereals and bakery produce, and dairy produce are also important. Dairy, meat and baby foods sectors are growing the fastest (Mayfield *et al.* 2001). In a fairly stagnant baby food market, organic products have shown exceptional growth. The organic baby food market has had a 50% rise in sales from 1997/8 to 1998/9 (Leatherhead Food Research Association, 2000 in Brown 2001). HiPP Organic baby foods now account for over 30% of all baby foods sold in the UK (O'Carroll 2001, IGD 2001 in Brown 2001). HiPP Nutrition UK Ltd is a family owned company, which have sold organic food for over 40 years. It is the world's largest processor of organic baby food and entered the UK market in November 1994.

5.1.2 Regulation and policies

Although organic farmers in the UK have been able to apply for support through other agri-environmental schemes since the late 1980's, there was no direct targeting of organic farming in the UK until the introduction of the 1994 Organic Aid Scheme. This paid farmers a per hectare subsidy for five years to cover the conversion period to organic. However, the level of payment was so low that the scheme was not very popular. It was not until the scheme was re-launched under the new name of the Organic Farming Scheme in 1999, with far more funds at its disposal and the backing of an advisory service, that it has become very popular (Mayfield *et al.* 2001).

In the UK, there are also two schemes to aid marketing and processing: the Marketing Development Scheme and Processing and Marketing Grant, which although are no longer operating in England, still serve Scotland, Northern Ireland and Wales. Sector Challenge, a national scheme to help long-term sector development, also has funds, which the organic sector can apply for to aid development. While Governments have been involved in promotion campaigns for organic food in Italy, Denmark and Austria, the UK has relied more on major supermarkets to provide promotions (Mayfield *et al.* 2001).

There is no national label for organic food in the UK. There are today five approved inspection bodies, but the *Soil Association* standards are most widely recognised, and they inspect 70% of organic food.

Table 5.2: The five inspection and certification bodies in the UK

Soil Association (established 1973)
Organic Farmers and Growers
Irish Organic Farmers and Growers
Bio-dynamic Agricultural Association
Organic Food Federation

In the UK, as in other EU countries such as Portugal, UK, Italy and Austria, there are competing quality assurance labels in the food market (Mayfield *et al.* 2001). UK supermarkets sell products under different environmentally-friendly labels, such as Conservation Grade and Integrated Pest Management, as well as under animal welfare (Freedom Foods) and Fair Trade labels. But there is little promotion of these labels. It is claimed that the organic product and label is clearly defined and retailers prioritise promotion of organic in order to consolidate this market and do not wish to confuse new or potential organic consumers.

In the UK, The Ministry of Agriculture, Fisheries and Food (MAFF) undertakes organic research, although this has been a very limited part of their research programme. But more money does gradually seem to become available. There has been an ongoing conflict between those committed to organic farming and the government over the level of support for organic farming, which is lower than average for the European member states. Compared with other agricultural sectors, a very low level of funding for organic research is supplied by MAFF; about 3.32 million Euros compared with 74.7 million Euros for research into GM crops. This represents 1.2% of the total (Soil Association 2000 in Mayfield *et al.* 2001:12). Programmes include: developing software to aid conversion to organic agriculture (WIRS), conversion to organic field vegetable production (HDRA), organic milk production (IGER), integrated management of pests and disease (HDRA), and understanding soil fertility (ADAS) (MAFF 2001 in Mayfield *et al.* 2001). There is also a newly funded European Centre for Organic Research at Horticulture Research Centre, East Malling, which aims to provide fruit growers with blueprints for successful organic production (Caspell and Creed 2000). Many of the multiple retailers including Waitrose and Tesco, have commissioned their own market research into why people buy organics. Sainsbury and Tesco are also involved in more production level research (Mayfield *et al.* 2001:35).

5.1.3 Distribution profile

Retailing is dominated by the multiple supermarkets, which account for over two-thirds of the UK organic sales. Retail distribution is dominated by a relatively small number of large multiple retailers including Tesco, Sainsbury's, Waitrose and Safeway, all of which are active in the organic sector. Sainsbury's is presently the biggest UK retailer of products and claims to have 25% of total organic retail turnover (Mayfield *et al.* 2001:30). Numbers for 1998/9 indicate that supermarkets in general account for 69%, independent retailers including health food shops account for 16% of sales, and farm gate or box schemes and other forms of direct sales for the remaining 15% (Soil Association 2000 in Brown 2001)

Table 5.3: The distribution of organic sales through different marketing channels, UK

The Soil Association 2000 (in Brown 2001):			*Mayfield 2001:*
Supermarkets:	74%	(451 million pounds)	69% (1998/9)/ 74% (1999/2000)
Independent retailers:	13%	(78 million pounds)	16%
Farmgate/box schemes:	13%	(76 million pounds)	15%
Total:		605 million pounds	

A number of local food initiatives have emerged in the UK, and the local food movement is considered to be particularly successful and widespread (Nordberg-Hodge 1999). Such initiatives are found both in rural and urban areas, and some examples mentioned by Nordberg-Hodge are located in Devon, Hereford, Worcester, West Somerset and Manchester. Local sales covers many outlets, the two which have been expanding the fastest are box schemes and farmers markets. In 2001, there were approximately 200 box schemes and 125 organic farmers markets (Brown 2001). In 1999, the demand for local produce outstripped supply, many box schemes are oversubscribed and the demand for farmers markets are greater than the availability of local producers in many areas (Soil Association 2000 in Brown 2001).

UK markets are, together with Danish, growing most rapidly at the present time (Mayfield *et al.* 2001). The organic food market in the UK has shown unprecedented growth in the last ten years. Organically farmed hectarage in the UK increased eight-fold between 1994 and 1999 (whilst Austria, Italy, Ireland and Portugal experienced five-fold increased, and Denmark a two-fold increase in area) (Holt *et al.* 2002). Numbers from 2001 indicate that organic food exceeds 5% of total UK food market (Holt *et al.* 2002). The UK market grew 55 per cent between 2000 and 2001, currently forecast to reach values of 1.67 billion Euros by 2002 representing 7-8 per cent of the total food market (Mayfield *et al.* 2001).

The value of sales of organic food was 100 million pounds in 1993, while in 1997 it was 260 million pounds (Kirk and Slade 2001). The UK organic food market had an estimated worth of over 605 million pounds in 1999 – 2000, and it is believed that this will increase to above 800 million pounds in 2001 (Soil Association 2000 in Brown 2001). Still, according to Mayfield *et al.* (2001: 39), the UK organics market is relatively undeveloped compared to some other European countries but it has enormous potential. Overall demand is growing faster (40% per year) than supply (25%) (Jones 2000).

Market maturation in UK, as in Austria and Denmark, is characterised by retailer power, vertical integration, promotional offers, development of own-label, designated store areas, and new products development. There are also definite signs of regional development strategies which access rural development funds and link with tourism (Holt *et al.* 2002).

Although the UK organic meat market is growing fast, it is constrained by a lack of trained butchers. As a broader range of organic ingredients becomes available, more organic convenience foods are emerging. There has been a shift away from staple organic products to processed foods. This has led to strong competition between brands and the development of strong brand images. In 1999 there were 800 licences businesses, and 45% of the processed market was in the fruit and vegetable sector (Soil Association 2000 in Brown 2001).

Most organic foods achieve a premium price, but these vary enormously, not only with products but also, with location and type of outlet. In the countries studied in the CONVERSION study, UK, Ireland, Italy, Portugal, Denmark and Austria, organic price premia ranged from 20 per cent to 100 per cent (Mayfield *et al.* 2001). In the UK, premiums vary considerably and appear to bear little relation to production costs. Consumers do have concern over the price of organic food and for many, organic are considered a luxury. Some studies also show an equal concern over product availability and range.

In the UK, involvement by the major retailers has been responsible for dramatic growth in demand and supply. UK multiple retailers have invested in production, supply contracts, a sourcing club, and research projects (Mayfield *et al.* 2001). As an example of the initiative of private actors, Tesco has well established producer groups in the UK through which their meat products are sourced. They are working to ensure greater availability of organic products by investing in research to improve organic agricultural productivity and realize grater scale economies, partly by funding research both at Aberdeen and Newcastle University. As an example, the Tesco Centre for Organic Agriculture at the University of Newcastle opened

in 2001 under professor Carlo Leifert who is the UK's first Chair of Ecological Agriculture. (O'Carroll 2001),

The expansion in organic farming is described as being demand-led in the UK (as well as in Ireland, Denmark and Austria, while it is described as government-led in Portugal and Italy) (Mayfield *et al.* 2001). However, (according to Mayfield *et al.* 2001: 26) many consumers are uneasy with supermarket retailing and there is some concern that their involvement in the sector will erode the organic "ethos", dilute standards and cut premium prices.

There has been no governmental promotion for organic food but the involvement of the multiple retailers in the rapidly expanding market has meant that they are now investing in promotion and advertising (Mayfield *et al.* 2001). Sainsbury's, Tesco and Waitrose have developed websites dedicated to organic food that help answer consumers' questions about organic food as well as providing an effective promotional tool (O'Carroll 2001). Sainsbury's, Tesco and Waitrose have been particularly involved in the promotion of organics. In fact, aggressive promotion by multiple retailers is seen as one of the factors in driving demand. Organics are seen as a marketable brand, whereas other "agri-environmental" products for example, conventional products grown under Integrated Crop Management (ICM) systems are not. In March 1998, the Soil Association got together with leading multiple retailers (see list Mayfield *et al.* 2001: 33-34) to form *the UK Multiple Retailers Organic Working Group*, with the following objectives:

- Maintain the integrity of organic foods
- Support UK producers entering the market
- Raise customer awareness of the wider benefits of organic food and farming
- Raise government awareness of consumer demand (Soil Association 2000 in Brown 2001).

Below is an overview of the policy and activity of the major multiple retailers.

Table 5.4: Policies of major multiple retailers to provide organic food, UK

Sainsbury's has put strong emphasis on development of its own label goods. It has recently announced a labelling scheme for products in the process of conversion.
Tesco's first major foray into organic food took place in 1998. They have eight specific areas where organic products are available, and where distinct signage is used: fresh produce, dairy, bakery, meat, frozen, ambient grocery, baby food and bears, wines and spirits (O'Carroll 2001). They state to be committed to the development of organic sales and has created a specialised post for this purpose.
Waitrose have developed a strategy to replace conventional produce with organic produce wherever possible. For two years running it has won the Organic Supermarket of the Year award, and it has recently launched Waitrose Organic Direct, from where you can buy organic boxes online.
Marks and Spencer have re-entered the sector after 7 years and state that organic food now become a major priority.
Safeway was the first supermarket to enter the organic food field by introducing fruit and vegetables in 1981. It is committed to offering a range of staple foods, including fruit, vegetables, dairy-products, processed food and beverages, but concentrates its efforts in the arena of organics for young children.
Asda announced in February 2000 that they were introducing own-label organic lines that would be up to 10% cheaper than competitors. The store was bought by US retail giant Wal-Mart and now is at the forefront of price competition in the UK. This has been a controversial decision and worried many organic producers and organisations about future organic premiums, and at this stage, Asda states that own label products will come from imports because British capacity could not meet demand (Jones 2000).
Iceland, a retailer traditionally known as the frozen food specialist, is taking moral stance on additives, biotechnology and other food safety issues, and aims to put together an affordable range of organic products which retail at minimal extra cost compared to non-organic alternatives, in order to bring organic lines to all of socio-economic levels. Iceland announced in June 2000 that it had bought nearly 40% of the world's organic vegetable crop (mainly from Central and North America and Europe) to meet growing demand, and planned that from October 2000 all frozen vegetables bought at Iceland stores would be completely organic. Iceland is also investing in the National Trust, the UK's largest landowner, in order to develop more organic land (Jones 2000).

Sources: (USDA 2000:7-8, Mayfield *et al.* 2001: 33-34).

5.2 Organic consumption

5.2.1 Research on consumers and organic food

The literature search revealed different kinds of consumer studies conducted in the UK. Some are marketing studies (typically commissioned from business actors such as supermarkets and executed by agencies like Mintel, and Taylor Nelson Sofres), some studies are done by institutions like the Institute of Grocery Distribution (IGD), the Food Standard Agency (FSA) or the Welsh Consumer Council. A number of academic studies are also conducted in the UK. Included in our review are i.e. some larger EU-funded studies, and some national studies conducted by different research units (at Universities or independent institutes). An overview of the reviewed studies is given in the section below.

Table 5.5: Empirical studies, UK

Source	Method	Participants	Objective
Holt (1993) Dr. Philos thesis, University of Bradford	Dietary survey of organic food consumers based on a questionnaire and a consecutive seven-day diet diary.	Sample criteria: 1) regular consumers of organic food 2) using a specialist retail outlet. Survey analysis based on 457 returned questionnaires. Of these, 60% completed diet diary.	An analysis of the changing British diet with reference to the consumption of meat and organic food.
Tregear *et al.* 1994 Article in British Food Journal	Telephone survey among the general public and nationwide postal survey to 150 randomly selected supermarkets and 112 wholefood shops.	242 randomly selected people in Edinburgh and Lothian district. Of this number 152 interviews were completed (63% positive response).	To investigate demand for organic foods
Tregear *et al.* 1993 Report: slightly shortened version of MPhil thesis, based on the same research work as the BFJ article.	(broadly the same material as above, but more expanded and in-depth.)		
Hutchins and Greenhalgh 1997 (MSc dissertation, University of Newcastle upon Tyne, 1994)	Survey	Survey data collected from 100 consumers in two locations in Tyne and Wear.	
Purdue *et al.* 1997.	Fieldwork in the South West of England: in-depth interviews, participant observations, focus group interviews.	Semi-structured interviews with central and marginal actors, recruited by the "snowballing method". (Number of interviews not given)	Investigate networks (cultural counter movements) related to organic box-schemes, music festivals and local exchange trading systems (LETS).
Kirk *et al.* 2001	Mailed Questionnaire	800 householders randomly selected in the South West of England (Somerset, Devon and Cornwall). 320 returned responses, 40 %	
Brennan and Kuri 2002	Questionnaire	Size of sample not given.	Assessment of consumer perceptions and attitudes
Harper and Makatouni 2002	Focus group discussions conducted in Reading 1999.	Four groups with 6-8 parents of children 4-11 years old. Knowledge of the meaning of organic food was a prerequisite for the participants' selection. Buyers and non-buyers of organic food.	
Sparks and Shepherd, 1992	Survey on consumer beliefs and attitudes toward organic vegetables		Assessing the role of Identification with Green Consumerism by use of Theory of Planned Behaviour

Beaufort Omnibus Survey For the Welsh Consumer Council (Bibbings 2003)	Survey based on face-to-face interviews in the homes of respondents.	1 002 interviews with sample designed to be representative of the adult population resident in Wales aged 16 and over.	The survey is part of the quarterly Welsh Omnibus Survey. Assessing awareness of sustainable development.
Beaufort Omnibus Survey For the Welsh Consumer Council. (Mathias 1999).	Survey based on interviews conducted face-to-face in respondents' homes.	1006 interviews, sample designed to be representative of the adult population living in Wales.	
Beaufort Omnibus Survey For the Welsh Consumer Council. (Jones 2000)	Survey based on interviews conducted face to face in respondents' homes.	1024 interviews. Sample representative of the adult population resident in Wales aged 16 and over.	The March 2000 Omnibus Survey

Table 5.6: Secondary sources, UK

Secondary sources	Referred by	Description, if available
MORI polls	Soil Association 1999 *Public attitudes to Organic Food* Wright 1997 Europe goes organic. *Food Ingredients Europe* 3,39-43.	
Which? Magazine February 1990	Kirk and Slade 2001	
Which? Magazine October 1999	Jones 2000	N=2000 - Who is eating organic and why
Dixon and Holmes 1987. *Organic Farming in Scotland.* Edinburgh University	Kirk and Slade 2001 Holt 1993	N=250
The Food Standard Agency 2001	Brown 2001	
The Taylor Nelson Sofres Superpanel households *Consumer Profiles*	The Soil Association, Organic Food and Farming Report 2000. O'Carroll 2001.	Data based on a continuous consumer panel of 15 000 households, providing purchasing information by electronic terminals at home. The sample is demographically and regionally representative of the UK market.
Mintel 1989, 1990 Mintel 1997, 1999 Mintel 1999 Mintel 1993, 1995	Holt 1993 Browne 2000 Pers. Comm. In Brown 2001 Latacz-Lohmann and Foster 1997	Mintel (1989) The Green Consumer Special Report Mintel (1990) Healthy Foods in Focus Mintel (1991) Organic Food Special Report Vegetarian and Organic Food, 1993, 1995 Organic and Ethical Foods, 1997. The Green and Ethical Consumer, 1999.
Marks & Spencer Customer Survey	Pers. Comm in Brown 2001	
Tesco's Customer Survey	O'Carroll 2001	
Good House Keeping	Brown 2001	Survey of 1000 UK customers
Institute of Grocery Distribution's Consumer Watch 2000	Brown 2001; O'Carroll 2001	
Leatherhead Food Research Association (LFRA) 1991	Holt 1993	
Henley (1989). *Organic Food Market Forecasts*. London: The Henley Centre	Holt 1993	(n=306)
Consumers Association (1990). *Which Way to Health?*	Holt 1993	(n=1477)
Dent (1988). *Consumer Awareness Towards Organic Produce.* London: Covent Garden Market Authority	Holt 1993	(n=130)

5.2.2 Buying behaviour

Marketing surveys indicate that organic food is perceived by a large proportion of consumers as having benefits related to a series of values focussed around health, safety and environmental concern (Brown 2001). A marketing survey among Tesco's customers indicates that one in four of their customers buy organic products (O'Carroll 2001). According to the Soil Association (2000), 65,5% of households had bought organic foods occasionally in 2000 (while the figure was 51,8% in 1999 and 37,2% in 1998). According to another survey of 1000 UK customers, (Good House Keeping 2001, referred in Brown 2001), 81% said they always or sometimes bought organic food (while only 8% thought that there was no advantage to eating organic food, and 19% had never bought organic food). In a report prepared under the EU-funded project "Conversion" (Mayfield *et al.* 2001), there is reference to consumer surveys[17] showing that 42% of people buy organic produce, although only 1-2% buys exclusively. Holt (1993) refers to some older studies showing the development of the percentage of consumers purchasing organic food from 16% in 1987 to 41% in 1990 (1987: 16%, 1998: 32%, 1989: 22% and 1990: 41%[18]). Consumers in Wales are reported to be increasingly interested in organic food, but the number buying organic food in Wales in 2000 (43%) was less than in 1999 (52%) (Jones 2000). A third of consumers in Wales report to feel that it is difficult to find organic food although there is a wide choice of suppliers, and the price of organic food is often an obstacle to potential buyers (Jones 2000).

Table 5.7: Buying frequencies, UK

Source	Buying frequencies
Soil Association 2000	2000: 65,5% of households had bought organic food occasionally
Mintel Int. *"Food You Can Trust"* 2000 Survey (Jones 2000)	Hypothetical: 75% would buy organic if sold at no extra cost
Beaufort Omnibus Survey For the Welsh Consumer Council	Region: Wales 2000: 43% buy organic food weekly/monthly or occasionally 1999: 52% buy organic food weekly/monthly or occasionally
Which? Magazine, October 1999 N=2000 (in Jones 2000)	31% tried to choose organic food 6% always/usually bought organic fruit and vegetables 18% occasionally bought organic fruit and vegetables 13% always/sometimes buy organic meat, dairy products, breads /cereals 6% always/sometimes buy organic ready meals, sauces, rice, pasta 2% always/sometimes buy organic flour, beans, pulses, snack foods

Consumptions of different types of food

According to supermarket marketing research, organic food purchases are often associated with foods, which are regularly eaten; regarded as a personal reward; or for special occasions. The initial organic purchase tends to be in produce (fresh fruit and vegetables), while the "protein sector" has moved into the "regular eaten" sector and sales of organic poultry, fish, beef, lamb and pigmeat has increased (Brown 2001). According to one survey (mailed questionnaire) among 800 households in Southern England, 27% of those who buy organic food buy organic meat (Kirk, Soffe and Hall 2001).

[17] No further reference was given in the report.

[18] Holt (1993, pp. 129) refers to studies by Dixon, P. and Holmes, J. (1987). *Organic Farming in Scotland.* Edinburgh University: School of Agriculture (n=250), Dent, S. (1988) *Consumer Awareness Towards Organic Produce.* London: Covent Garden Market Authority (n=130), Henley (1989). *Organic Food Market Forecasts.* London: The Henley Centre (n=306), and Consumers Association (1990). *Which Way to Health?* February (n=1477).

According to marketing research done by the baby food company HiPP Nutrition UK Ltd, 34% of customers would be likely to choose organic baby food regardless of the price. Qualities sought in baby foods by 94-84% of respondents, were (in decreasing order) that is was made from pure, natural ingredients; free from artificial additives, fertilisers and pesticides; looks and tastes like home-made food; and free from GM ingredients (Brown 2001).

The PhD study of Georgina Holt (1993) includes a dietary survey among organic food consumers. She finds the following food consumption trends: 1) Low meat consumption; 2) Preference for unrefined foods; 3) Preference for unprocessed foods. She also finds a shift away from a diet focussed on meat, potato and bread, towards increased consumption of vegetable foods and in particular, the incorporation of non-traditional vegetable foods (such as nuts, pulses and grains) into the diet, resulting in a greater diversity of protein and staple foods. She also finds a tendency towards a greater retention of traditional British mealtimes and less likelihood of so-called ”street grazing” (Holt 1993: 219).

5.2.3 Consumer descriptions

Perceptions of consumers by other food system actors

Consumer demand is referred as a market driver, for instance in the formulation in a report by the Soil Association (2000a): An “upsurge on consumer demand” has led all major retail outlets to recognise the potential of the organic sector, with an annual increase of 40% in overall sales (Soil Association 2000a). According to Mayfield *et al.* (2001, p 39), the UK organics market is relatively undeveloped compared to some other European countries but it has enormous potential. Overall demand is growing faster (40% per year) than supply (25%) (Jones 2000).

There are many examples of expressions of perceptions of consumers by the market actors – some of which are based on marketing research or other kinds of studies, and some of which the basis is more unclear. One example of studies of other actors’ opinions (about consumers opinions) is a survey among organic businesses about future prospects for selling organic food. In this study, perceived major market drivers were food scares, health concerns and avoidance of GM, while price, availability and range were perceived as major inhibitors (IGD survey, reported in O’Carroll 2001).

A survey among 34 organisations in the UK involved in ethical or fair trade or organic agriculture revealed that they perceived consumers as buying mostly for health reasons rather than for environmental concerns. In their opinion, high profile news stories of contaminated or unsafe conventional food, and worries over the use of genetically modified foods or ingredients, are encouraging more people to turn to organic foods (Browne *et al.* 2000). A common trait among the respondents from the various organisations was that they felt it to be a “hierarchy” of ethicalness among consumers. Some examples of classification of “ethical consumers” by respondents in these organisations were “true” ethical consumers (suggested to be about 2% of the population), semi-ethical or “arm-chair” ethical (20-30%), while it was suggested that 80% would be ethical if there was no price premium and no special effort required to buy ethically. Respondents in the organisations saw their own present role as catering to the “fully ethical 2 %”, and regarded supermarkets as capable of supplying, in a modified version, the latent demand of the “80%” (Browne *et al.* 2000, 79).

Marketing studies – examples of segmentation

The following example of division of consumers into segments, is done according to their interest in food production: 48% ”Abdicators” (not bothered to learning more about food

production), 42% "Spectators" (interested, but not to the extent of actively finding out more), and 11% "Investigators" (actively trying to improve their knowledge) (Mathias 1999).

Another example of customer segmentation based on a Marks & Spencer customer survey reported in Brown (2001), was "committed enthusiasts", thought to be 20% of the organic customers, but responsible for 80% of organic purchases; "Probationary customers", thought to be regular users of 3 product types, looking for organic in all food categories and trial purchase organic lines; and "novice customers", who are perceived as interested, but buying only occasionally. The idea that differences in consumption levels have some connection with other characteristics such as type of motivation and willingness to pay is supported by other studies. Marketing surveys reported by the Soil Association (2000) indicate that the food market is dependent on core customers, where 7% of the buyers are thought to buy 57% of the organic food.

A MORI poll done for the Soil Association in June 1999 (2000) is referred stating that consumers tend to be either under 30 or among the 50-70 year olds, from the AB and C socio-economic groups, and slightly more likely to be female. An older MORI poll referred in Wright (1997), gave a profile of the typical organic food consumer as belonging to social grouping AB, age 25-34, and shopping at certain named supermarkets. It also indicated that six out of ten would buy organic if it was easily available and cost no more than conventional food.

Holt (1993: 130) summarises some studies of consumer demographics from 1989-1990, concluding that income and children are important factors in the decision to purchase organic food. The three studies she mention[19] all found parents, of social class AB (and C), and age 35-44 years (one found young/middle-aged) to be associated with buying organic food. One (LFRA 1991) also found women to be associated with buying organic foods.

Other suggested distinctions between consumer groups are between those who are strongly committed to organic food as a way of life (who tend to have less income but still buy organic even it is disproportionately expensive), and those who belong to the upper middle class (for whom organic food is an affordable consumer option) (Purdue *et al.* 1997). Holt (1993) found that what she calls "dedicated" organic consumers had very low-income levels, and high educational levels. (So evidently, the division according to "willingness to pay", and the effect of income levels can be modified by factors such as these.)

Studies on "attitudes and behaviour"

Some studies have typically focussed on the connections between consumers' attitudes and their behaviour. One such study focussed on self-identity and the theory of planned behaviour in assessing the role of identification with green consumerism (Sparks and Shepherd 1992). They found that attitudes correlated significantly with intentions. They found a measure of self-identity to be useful in predicting intention, and that self-identity correlated with attitude. A general logic within this school is that attitudes usually play a major role in shaping behaviour and that an important property of attitude is the confidence in which they are held. Confidently held attitudes may usually be relied upon to guide behaviour.

In a survey among 800 households in Southern England, the Fishbein and Ajzen model for behaviour prediction was used to observe consumer attitudes to organic meat by measuring attitudes, beliefs, intention and past behaviour. They concluded that the subjective norm component correlated with intention suggesting that social pressures do have an effect on this particular food choice (Kirk, Soffe and Hall 2001).

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[19] Mintel (1989) *The Green Consumer Special Report*, LFRA (1991) (compiled by Boyle, C. S., Cathro, J. S., and Emmett, S. E.) *Organic Foods in the UK: Niche or Mainstream Market Opportunity?* Reading: Leatherhead Food Research Association, and Mintel (1990) *Healthy Foods in Focus*.

Consumer values approach

In a PhD study from the University of Reading, a consumer values approach to the marketing of organic foods is suggested (Harper and Makatouni 2002). The means-end theory was used to uncover the personal relevance and meaning of organic food characteristics for parents, and the laddering technique attempted to understand what organic food means to consumers. Three main broad categories of "life" values were found for organic products: 1) Centred on the human being such as responsibility for family and self-health and well being; 2) Centred around animals' wellbeing such as respect and responsibility for the animals and their rights; and 3) centred around the environment such as respect and protection of the environment. This study concludes with suggesting a focus on "life values", rather than trying to identify the key differences between food production methods.

Some marketing research[20] referred by Mayfield *et al.* (2001), may be seen as consistent with this suggestion. Results from focus groups with women between the ages of 20-55, indicated that organic food was perceived as having a coherent philosophy and set of values. The term "organic" was therefore seen as communicating directly and effectively. Interestingly, genetically modified food appeared to have the opposite effect, even when the aim of the genetic modification was presented as lowering the use of pesticides and gaining a higher nutritional value. In this perspective, organic food might be seen as representing a coherent set of values and appearing as a distinct alternative to other ways of food production based on different basic values.

Somewhat related to this are analyses relating the buying of organic foods to different kinds of food movements of counter movements. In her PhD study, Georgina Holt (1993), focus on the relationship between cultural values and food choice. She investigates "ecological eating" as a consequence of the emergence of an ecological food ideology, which grew out of the counterculture movement in the 1960s. Purdue *et al.* (1997) discuss the buying of organic food, particularly through box-schemes, as related to green milieux, which encourage ecological and cultural innovation of everyday life.

Such ways in which the use of organic food might be embedded in various set of values and every-day praxises are important to get a more thorough understanding of.

5.2.4 Consumer concerns

Consumer concerns are investigated in different ways in different studies, and various terms and categories are used in the surveys and interviews. Several studies conclude that factors which motivate people to buy or avoid organic produce are complex (for example Treagar, Dent and McGregor 1994) and that organic food is perceived by a large proportion of consumers as having benefits related to a series of values focussed around health, safety and environmental concern (Brown 2001). A small survey conducted in the Newcastle area indicates that "natural", "not intensive" production "without chemicals", "without growth hormones" are key elements in consumers' interpretation of the term "organic farming" (Hutchins and Greenhalgh 1997). These factors may be seen in relation to concerns about the environment and animal welfare as well as health. In particularly qualitative studies, indicate that consumers see these themes as interwoven – rather that as clear-cut separate types of motivations and concerns. This is an important point to keep in mind when interpreting results about consumer concerns.

[20] Work done by Dragon, one of the UK's leading brand management consultancies. The results were discussed in an article in the Financial Times Food Business. We have not been able to obtain this study directly.

Several of the different elements found to be important for consumers may be interpreted as relevant to more than one ”main category” of motivations. For example, a wish to buy GM free foods may be rooted in health concerns and environmental concerns, as well as other motivations of political or ethical nature. Likewise, a wish to buy food produced without or with minimal use of pesticides, might be motivated by different kinds of concerns (for example health, environment, ethics). Also adding to the complexity are the different ways in which one “type” of concern may be understood. Health concerns, for example, may include a wide range of considerations, viewed in a longer or shorter perspective, related to personal health or the health of ones family or future generations, or related to a narrow or wide understanding of the concept of health. One example of a wide use of the health concept is Haworth *et al.* (1998) who include the health of the environment[21].

But despite the complexities, some broad themes of concern seem to crystallise from the reviewed studies, and to the extent that it makes sense, consumer concerns will be discussed according to themes in this section.

Table 5.8: Consumer concerns, UK

Survey	Concerns
MORI survey [1999]	Reasons for buying organic food: 53% health concern 43% tastes better 28% environmental concern
Welsh Consumer Council Survey [2000] (Jones 2000)	Region: Wales 67% health concern 43% tastes better 16% environmental concern
Hutchins and Greenhalgh (1997)	Region: Newcastle 93% bought organic for “health reasons” and/or because it is “better for the children” 30% bought because it was “better for the environment” as the sole or joint reason

Ethical concerns

The conditions related to globalisation, with the rapid flow of goods and information and the rising awareness of an increased interdependency (Held *et al.* 1999), have a bearing on the issues relevant for ethical concerns and the ways in which such concerns may be expressed. According to Bauman (1993), we are faced with increased responsibility as individuals of making our own morally responsible choices, as classical ideology and tradition has lost influence and become more fragmented. In this respect, the arena of consumption plays an important role – not only as a place to satisfy individual needs, but also as a place to act morally responsible. This moral dimension of consumerism is described by Gabriel and Lang (1995) as a “new wave”, characterised by the connections between production and consumption, both at local and global levels, where issues such as fair trade, workers social rights and environmental impacts in the third world producer countries are central concerns.

Sometimes “green” – is distinguished from “ethical” consumption, where “green consumerism” is used as referring to consumer concern and action for environmental issues, while “ethical consumerism” is understood as concern for social issues reflected through consumer choices, for example through support of fair-trade goods. However, these definitions are subject of debate, and “ethical consumerism” considered by some to be an all-encompassing concept, of which environmental consumerism is a branch (see for example Smith 1990). Ethical awareness related to choosing organic food might refer to a broad spectre of concerns, for example for the environment, animal welfare, equity among people involved in the food

[21] The term ”agroecosystem health” is used by Haworth *et al.* (1998).

chain or who are affected by the use of natural resources, social rights for workers, care for the health of the people you serve food etc.

There is a general perception that ethical concerns among consumers have become more widespread as concluded for example in a report by the Welsh Consumer Council (Mathias, 1999). Marketing surveys in the UK report to having found an increasing willingness to shop "ethically", with 7% claiming to buy/use ethical products always/nearly always in 1999, almost doubling the figure of 1990 (Mintel 1999 referred in Browne *et al.* 2000). Correspondingly, the number of consumers "unconcerned" about ethical issues has fallen from 22% to 15% over the same period of time. Greater availability of fair trade products such as tea and coffee in major supermarkets as well as an increased awareness of issues such as child labour is seen as factors contributing to this raise in consumer concern and willingness to shop. (Browne *et al.* 2000).

A discrepancy between what consumers say they care about and what they do is seen as a challenge related to ethical consumption. According to a study by the Co-operative Bank, one-third of consumers claim to care about companies' records on social responsibility. Still, ethical products rarely achieve more than a 3% market share, and this gap is referred to as the "30:3 syndrome" (Cowe and Williams 2001 in Bibbings 2003). The same study also found that while 44% of respondents had avoided making a purchase on ethical grounds, most did not like being identified as an "ethical consumer". This again gives a reminder that the ways in which questions are formulated in surveys are of crucial importance for the results.

Animal welfare

Concern for animal welfare is an ethical issue often raised in connection with organic food, and it is often reported as an important motivation for buying organic food. However, what consumers have in mind more precisely regarding animal welfare is often less clear.

According to a EU-funded study on consumer concerns about animal welfare and the impact on food choice[22], consumers define animal welfare in terms of natural rearing and humane slaughtering, and they also use animal welfare as an indicator of product characteristics such as food safety and quality (Harper and Henson 1999 in Harper and Makatouni 2002). The findings that consumers associate "organic farming" with "natural", "not intensive" production "without growth hormones" (Hutchins and Greenhalgh 1997) may also be interpreted as giving an indication about consumers' perception of animal welfare in organic production.

Environmental concerns

There is a clear tendency of seeing environmental concerns among consumers as a major motivation for buying organic food. However, there is lack of consensus on the relative importance of environmental concerns compared with other types of concerns, for example related to health. Several studies state environmental concerns as emphasised to a lesser degree than health concerns.

Various studies have attempted to divide consumers into different types according to degree of environmental concern – ranging from the non-environmentalist "grey" consumer who is sceptical about environmental issues and happy to trust science to solve any problems; to the committed "deep green" consumer who integrates environmental considerations into every lifestyle decision – yet deeper comprehension of the issue is seen to be lacking.

[22] Project under Framework 4: FAIR-03678 (CT98-3678). Partners from UK, Ireland, France, Italy, and Germany.

According to Professor Ken Peattie from Cardiff University (in Bibbings 2003), the green consumer is notoriously difficult to pin down. Little conclusive evidence has been discovered about the socio-demographic status of the typical green consumer, with research often reaching contradictory results over, for example whether ecological issues are of greater concern to older or younger people. However, Peattie states that one important feature by being a "green consumer" is demonstrating a commitment to sustainability issues through the sensitive use and disposal of products via a "make do and mend" philosophy: *"Any increased tendency to be green in one's consumer behaviour, is quite likely to be counterbalanced by a tendency to be less of a consumer"* (Bibbings 2003: 30).

Related to food products, such an attitude might be reflected in seeking to avoid unnecessary food-miles, packaging, and in general excessive use of energy in all levels of the food chain. Also highly processed "low-caloric" foods (such as "fat-free butter") may come unfavourably out of calculations of energy used in production / energy value for consumer. The findings by Holt (1993) of preferences for less processed and unrefined foods, as well as lower meat consumption among consumers of organic food may be seen in accordance with such a line of "sustainable eating". Examples from empirical studies in other countries (here from Denmark) also suggest organic consumers' ambivalence towards excessive consumption, where "big-volume-consumption" (as a conceptualisation) is seen as contradicting the values "care" and "responsibility" (Jensen 2000).

Several studies indicate that organic food is commonly perceived by the general public to be a healthy and environmental friendly option (see for example Tregear, Dent and McGregor 1994). The Newcastle study by Hutchins and Greenhalgh (1997) reported that 30% chose "better for the environment" as the sole or joint reason for purchasing organic food. A survey by Mintel (Jones 2000), found 16% to be buying organic food out of concern for the environment.

There are indications that flimsy and exaggerated eco-claims have led many consumers to become increasingly distrustful and cynical (Blaza *et al.* 2002 in Bibbings 2003). Mintel's 1991 Green Consumer Survey found that 90% of UK consumers were highly sceptical of green promotion campaigns (Bibbings 2003). Of particular interest to the prospects of an organic HACCP, are findings that consumers are particularly distrustful of manufacturers own claims about how green or ethical their products are. Consumers need to hear consistent messages about sustainability from reliable sources, and it is important to have a comprehensive understanding of which sources consumers find reliable and in what forms they want the communication to take place.

MORI polls cited by the Welsh Consumer Council, indicate that many people do not consider the state of the environment to be a central factor in their quality of life: According to a survey conducted in May 2002, for which 1 002 adults were interviewed, health was named by 42% as one of the more important problems facing the UK today, and only 14% considered the environment as being an important problem – ranking it the sixth most important issue (Bibbings 2003). These results were discussed as indicating that consumers in the UK are suffering from a degree of "eco-fatigue", and that they might be better disposed to listen to appeals based on health, family and financial benefits rather than environmental ones. Efforts to change consumption patterns[23] based on environmental messages are discussed as less likely to succeed than focussing on social justice and issues such as loss of community, loss of respect for one another, the lack of fairness in economic systems, and the sense that rich countries are taking advantages of poor ones (Hobson 2002).

[23] The study by Hobson (2002) analysed the results of a sustainable lifestyle programme called Action At Home.

Health concerns

Public health concern is seen as generally having increased. A market review[24] concludes that the examination of the food manufacturing and ingredients market show that each area has been affected by consumers demanding healthier food which should be functional and organic in nature (Food Ingredients And Analysis International – Market Review).

Several studies indicate health concerns is a major motivation for buying organic food (Soil Association 2000a; Institute of Grocery Distribution in O'Carrol 2001; Tregear, Dent and McGregor 1994; Mintel 2000 in Jones 2000). According to the *Food You Can Trust* 2000 Survey by Mintel (Jones 2000), health was the main reason for consumers choosing organic food with 67% believing that organic food was a healthier option.

But even tough there seem to be a consensus that "health concerns" is a major – and perhaps the most important – reason consumers give for buying organic food, the question about how "health concerns" is interpreted remains quite open.

Holt (1993) reviewed some consumer studies[25] from the period 1987-1992, finding that "health effects" as a reason for buying organic food was chosen by 31-59% of respondents. In some of these studies, the respondents could in addition answer "chemical/residue free" (which 16-40% did), and in one study, additional options were "vitamin and mineral content" and "quality". All of these issues might add up to a higher sum of "health related concerns", while they also can reflect other kinds of concerns (such as environmental concerns). An increased focus on food safety is seen be a trend based on these studies (Holt 1993).

Food safety issues and health concerns in terms of "avoiding potential dangers" are also relevant in more recent studies. A market survey reports that consumers have an understanding of organic food as safer and healthier linked to a perception that no pesticides are used (Mathias 1999). A small survey conducted in the Newcastle area indicates that production "without chemicals" and "without growth hormones" are key elements in consumers' interpretation of the term "organic farming" (Hutchins and Greenhalgh 1997). The majority of respondents in this survey (93%) stated that they purchase organic for "health reasons" and/or because it is "better for the children". A survey in the South West of England indicated widely positive attitudes to eating organic meat, which was perceived as having better quality than conventional meat. Organic meat was regarded as being more likely to be free of residues, be produced in a more environmentally friendly manner with better animal welfare, have better taste than conventionally produced meat and be better for their health with less fat (Kirk, Soffe and Hall 2001).

In the report mentioned above, prepared under the EU-funded project "Conversion" (Mayfield *et al.* 2001), there is reference to a deep scepticism held by many about most agriculture and food production. An article in the Financial Times Food Business regarding the supermarket chain Asda is referred stating that consumers have developed a deep scepticism about the nature of the food chain as currently constituted. This scepticism is interpreted as a natural consequence of BSE, the dioxin crisis, and what is described as the clumsy introduction of GMOs into the European food supply and the attendant poor presentation of them to consumers. The presentation of GMOs is seen as having "broken the news" to consumers that modern intensive farming requires intensive input of chemicals – a message apparently new and unacceptable to many (Mayfield *et al.* 2001: 41).

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[24] Based on material from Datamonitor, Euromonitor and Frost & Sullivan.
[25] Dixon and Holmes 1987, Henley 1989, Consumers Association survey 1990 and 1992, Soil Association 1992.

Such issues constitute an important context for understanding consumers' attitudes towards organic food. The degree of worries and distrust in agriculture and food production in general are likely to influence perceptions of organic food.

Quality

Evaluations of organic food related to quality may include a broad spectre of issues, but most of the studied reviewed focus on quality aspects such as taste, appearance and keeping quality. Several studies make reference to better taste as an important motivation for buying organic food. According to some studies, as many as 43% states better taste as an important reason for buying organic food (MORI poll from 1999[26] and a survey by the Welsh Consumer Council from 2000, both referred in Jones 2000). Another market survey found that 25% considered the main benefit of organic food was better taste, and this was most pronounced among the age-group 45-54 years and higher social class (IGD 2000 in Brown 2001).

As these examples might indicate, there are quite large differences in the percentage of respondents giving taste as an important motivation for buying organic food in different surveys, and some explanation is likely to be found in differences in formulating the questions and responds categories. Several surveys indicate that around 20% (17-24%) are motivated by taste[27] (Brown 2001; Food Standard Agency in Kirk and Slade 2001).

It is interesting that in some surveys a greater number of respondents say they purchase organic food because of taste than environmental and animal welfare issues (for example in the MORI Survey 1999).

Among the negative consumer perceptions reported about organic food, is perceived shorter shelf life (one survey found 31% of respondents to have this opinion IGD 2000 in Brown 2001). It is important to see such results in relation to way of distribution, as this might affect shelf life as experienced by the consumer – without it being evident for the consumer which level in the food system having had the most important impact on the keeping quality of the product.

Tregear, Dent and McGregor (1994) found little evidence in their survey to support the often-held view that misshapen or non-uniform size of organic produce was disincentive to purchase.

Concern with traceability and food system knowledge

Holt (1993) pointed at what she saw as a shift in focus of consumer concern from the composition of food *per se* to the manner in which food is processed and produced, and she also found some evidence of this trend in consumer studies on reasons for buying organic food. One example of this is consumers health concerns related to possible residues in the food from chemicals used in the production.

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[26] Note that the results from this survey does not add up to 100%, so the respondents have been able to name several factors as important. The distribution was: Health reasons 53%, tasting better 43%, GM free 30%, and environmental/animal welfare 25% (in Kirk and Slade 2001).

[27] In a customer survey by Marks & Spencer (Brown 2001) 17% meant that taste was an important reason to buy organic food. According to a Food Standard Agency survey, 18% cited taste as basis for purchasing decision (ref?). Which Magazine (1990) found that 20% meant organic food tasted better, and Dixon and Holmes (1987) found this number to be 24% (both referred in Kirk and Slade 2001).

The general knowledge about the food system including food production among consumers is found to be quite low. In one survey, 49% answered that they had poor understanding of how food is produced (Mathias 1999). According to the same survey, food production issues rarely are considered at the point of purchase, and food choices are primarily based on price, taste, appearance and sell-by date. One in three consumers say they regularly consider nothing more than these four product attributes.

Knowledge of animal feed, together with freshness of meat and brand/quality label, were considered important safety indicators by UK consumers when judging safety of beef at point of purchase (Henson and Northen 2000). Information about animal feed is an example of traceability issues relevant for consumers.

In a study of survey data from the US and the UK, aiming at developing an index of consumer food-related welfare, nine constructs were used: where food comes from; behaviour of food companies; choice; ethical issues; taste; cost; health and nutrition; convenience; and safety (Henson and Traill 2000). It was found that both the US and UK food systems were judged by consumers to perform less well with respect to ethical issues, behaviour of food companies and cost. Particularly the first two of these concerns (but also the issue of cost) are complex issues, which might be very difficult for consumers to get in depth information about.

At the same time as the general knowledge about the food system may be low, there is indication that consumers want more information related to the food system, such as information about the way food is produced. One survey showed that 58% of 1006 respondents meant that there was not enough information available to consumers about organic food (Mathias 1999).

Results from a "FAIR-project" referred in Mayfield *et al.* (2001) show that among UK consumers, knowledge of the system of regulation was limited. Few consumers had heard of the various certifying bodies and labelling schemes. These findings confirms research published by Hutchins and Greenhalgh in 1997, which showed that less than 10% of respondents recognise any of the certifying organisations' labels, and two labels were not recognised by anyone, yet consumers trusted organic labels with little thought (Mayfield *et al.* 2001). This finding that consumer in the UK generally seemed to have a good recognition of and trust in organic labels, but little understanding of the certification processes, could also be a sign of food system issues appearing to be distant for many consumers, particularly when regarded in a more concrete way.

Related to the issue of food system knowledge, is the understanding of the term "organic". According to a 1999 survey by the Welsh Consumer Council, 90% of those questioned claimed to understand what was meant by the term "organic" (Jones 2000). This suggests a good awareness of the subject although participants were not asked to provide a clear definition. However, according to the same study, only 21% reported to be happy with the level of information about organic produce. A survey conducted by Mintel International in August 2000; *Food You Can Trust 2000* (referred in Jones 2000), found the highest level of consumer awareness of organic food to be associated with organic vegetables and fruit.

Form of distribution

The form of distribution used by consumers can be of relevance for their perceptions of the food and their motivations behind their choices in several ways.

On way in which such connections become apparent, is when consumer concerns and preferences related to the "biography" of the food (including way of distribution) are interwoven

with their concerns and preferences related to "the food itself" (see for example Torjusen *et al.* 2001). Sometimes, this can be expressed in terms of a broad understanding of the concept of quality – including both product attributes and "food system attributes". This implies that consumer perceptions of the food item should not be viewed isolated from the consumer perceptions about the food system. Perceptions of consumers by other food system actors may also reveal that they regard consumer motivations to differ according to their preferred ways of shopping food. One example is the opinion among alternative trade organisations (ethical, fair trade, organic) that consumers patronising alternative trade organisations have a different emphasis on different types of motivations than consumers at the mainstream supermarkets (Browne *et al.* 2000).

In a paper discussing marketing strategies for organic food in Germany and the UK, the authors raise the question that a structural incompatibility between how supermarkets deal with organic food and how consumers perceive and valuate organic food may be a problem in the UK (Latacz-Lohmann and Foster 1997). The refer to a divergence in the understanding of "quality", with the supermarkets focusing on conventional criteria for produce such as appearance (size and shape), while committed buyers of organic food stress the nutritional value and associated environmental and health benefits (Kesseler 1996 referred in Latacz-Lohmann and Foster 1997; Tregear, McGregor and Dent 1993).

In a comparative European study it was found that both information of country of origin of meat and preference for buying locally produced food was perceived as less important for UK consumers – related to their evaluation of quality and safety of meat - compared with consumers in some other European countries[28] (Cowan 1998). Nevertheless, 43% of UK consumers had a preference to buy locally produced food and 42% strongly agreed that information of country of origin was important.

5.3 Main findings and future approaches

There have been several studies conducted in the UK on consumer concerns related to organic food. Much of this has been commercial marketing research aiming at defining consumer segments, but also a number of academic studies have been undertaken. There seem to be a relatively broad knowledge of organic food among UK consumers, many of them having encountered it in supermarkets. It appears that there is more research done in some areas as opposed to others, and there are also indications that there are regional differences in the use of and possibly attitudes towards organic food. For example Purdue *et al.* (1997) reported that a "green milieu" play a significant role in the South West of England. It would be of interest to follow up on such possible regional differences within the UK. Although some main types of motivations for buying organic food have been identified, a deeper understanding of what precisely consumers mean by these references to "health", "environmental concern", "animal welfare", "quality" and "ethical concerns" is needed. Below follows an attempt to summarise the findings of the available research with regard to the character of the perceptions and concerns expressed by British consumers of organic food.

With regard to eating quality, it seems that:

- Organic food is perceived by some consumers as tasting better
- Some report perceptions of shorter shelf-life
- Some associate organic food with a quality of "home-made" food, for example organic baby-food being perceived as "looking and tasting like homemade food".

[28] Germany, Ireland, Spain, Sweden and Italy.

With regard to other aspects of quality (related not only to the product as such), it seems that:

- Organic food is perceived by a considerable proportion of consumers as having benefits related to a series of values focussed around health, safety and environmental soundness. These may be perceived as interwoven rather than falling into distinct categories of concerns or motivation for purchase.
- Perceived health and safety benefits of organic food may be expressed in various ways, for example in terms such 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. Many of these expressions concern the absence or reduced risk of potentially health harming substances in the food or in the food production, but there are also some reference to "positive" health criteria, such as perceptions of a good or higher nutritive content (vitamins and minerals, protein quality etc.) in the organically produced food.
- Ethical issues related to organic food are for example fair trade; workers social rights; environmental impacts in the third world producer countries; equity among people involved in the food chain or who are affected by the use of natural resources. Issues of animal welfare (for example in terms of natural rearing and humane slaughtering) and environmental protection are also included in the ethical concerns related to organic food.
- Perceptions of environmental soundness of organic agriculture are often related to the key features of organic production methods without the use of chemical pesticides and fertilizers. Similar terms as associated with health benefits are often used, such as "natural" and "not intensive".

With regard to safety:

- There are good indications that some consumers may view the choice of organic food as a strategy to avoid potential dangers in the food. As the listing above suggests, several of the benefits by organic food expressed by consumers are related to perceived possibly harmful substances, which as thought to be, absent or less likely present in organic foods. However, also as pointed out above, there are also other ways in which organic foods may be perceived by consumers as beneficial related to health.

Worry and fear are expressed in regard to:

- The use of chemical pesticides in agricultural production
- The use of medicines in animal production
- The use of growth hormones in animal production
- The use of GMOs
- The use of artificial additives in food
- Animal diseased, such as BSE.

With regard to information needs by consumers, importance is attributed to:

- Information about the origin of the food (country, region, local); the origin of food ingredients in processed food (for example related to risk of GM ingredients); methods of processing and methods of production. Aspects of methods of production reported to be of particular interest are information about animal feed. Freshness of food is another often-cited concern. Traceability in general seems to be an important focus.
- Information from credible sources. In the UK, some studies have indicated that consumers have perceived ”green” and ethical claims from manufacturers about their

own products as less credible. The various ways of communications also might have a bearing on issues of trust; for instance whether trust in systems of personal networks are in focus.

Organic food might be embedded in various sets of values and everyday practices. Organic food might be associated with

- Values. Some studies present organic food to be associated with certain "life values", or perceived as having a coherent set of values. The understanding of organic food by consumers might in this perspective be as representing a distinct alternative to other ways of food production, processing and distribution, based on different basic values.
- Dietary choices and eating contexts. For example, some studies indicate that organic food is more likely to be associated with foods that are more frequently eaten; foods that are regarded as a personal reward; or foods for special occasions. There are also some indications that organic food might be associated with dietary choices such as lower meat consumption and a preference for unrefined and unprocessed foods, as well as untraditional choices of vegetable foods (such as nuts, pulses and grains). Other studies indicate associations between the choice of organic foods and an emphasis on the social significance of meals and on retaining traditional meal patterns.
- Social networks or movements (For example Green movements, ecological food ideology).

Other issues of importance, where less research appear to having been conducted, are:

- The dynamic relation between the systems of provision and consumption of organic food. An issue, which seems to be of particular relevance of further investigation in the UK, is to better understand the role of "the multiple retailers" (supermarkets). A large percentage of organic food is sold through "main multiple retailers", the estimated percentage varying between 70-88%[29] (O'Carroll 2001). It is likely that this situation have implications for the way consumers view organic food, i.e. in relation to their perceptions of good strategies of trust and the role of labels. In the UK, the retailers have taken a central role i.e. in relation to self-control and implementation of health and safety measures, and in sourcing and developing the organic food market. The effect that this has had on consumer perceptions of organic food and communication about food issues is of interest to have a better understanding of.

Regarding communication of safety and quality issues in the market, several themes are of importance and in need of further research. Some of these are:

- The use of labels. UK supermarkets sell products under different environmentally friendly labels, such as Conservation Grade and Integrated Pest Management, as well as under animal welfare (Freedom Foods) and Fair Trade labels. But there is little promotion of these labels. The organic product and label is reported to be prioritised by retailers in order to consolidate the organic market and to not confuse new or potential organic consumers. However, the implications of having a variety of labels in the market should be better understood.
- The relation between food system knowledge, in particular knowledge of systems of regulation, and consumer trust in various sources and manners of information.

[29] Market surveys by Mintel (70%), Soil Association (74%) and Taylor Nelson Sofres (88%) referred in (O'Carroll 2001).

- The use of and perceptions of various safety indicators. In the reviewed studies, there are many references to health in terms of risk-related issues (such as possible chemical residues in the food etc). To find out more about what precisely consumers' perceptions of food related risks are, and what kinds of information they would like (and in what form) to be reassured and/or be able to make informed choices is important. It is likely that the evaluation and application of different safety indicators will vary between consumers in different countries. Data from the EU-funded project "Quality Policy & Consumer Behaviour", reported in Henson and Northen (2000), show what consumers in 6 European countries (Germany, Ireland, Italy, Spain, Sweden, UK) regard as important safety indicators, and what they perceive as concerns related to food (meat). In the UK, freshness was ranked as number one of safety indicators for fresh meat, and salmonella, antibiotics, hormones and BSE represented high level of concern.

6 Case III: Italy

6.1 Organic production and market

6.1.1 Production

The development of the organic sector in Italy has been characterised in optimistic terms (Compagnoni 2001; Compagnoni, Pinton and Zanoli 2000; Pinton 2001). The increase in the number of organic certified farms – from 1,500 in 1990 to 49,018 in 1999 – has been called the "Bio Boom" (Compagnoni 2001), and Italy is often referred to as the number one country in Europe when it comes to certified organic hectares (Sassatelli and Scott 2001; AIAB statistics). The total number of organic companies was 51,552 in 2000 and 63,156 by the end of 2001, a growth-rate of 22,5% (Bio Bank, New data on Organic and Ecological Issues in Italy). The most important organic products produced in Italy are animal fodder, cereals, olives and fruit, plus some vegetables and wine (European Commission 2000).

These production figures do not reflect *consumption* in Italy. Approximately 33% of organic products are exported (Compagnoni, Pinton and Zanoli 2000), approximately 54% are produced for animal fodder, and 10% of Italian organic producers do not market their products as organic (European Commission 2000; Pinton 2001; Santucci 2001). So even with a growth of over 20% since 1996, the market for organic food in Italy remains relatively small and can be considered to be at a pioneering stage. Expenditure on organic foods is approximately 1% of total food expenditure (ITC 2000). The types of product consumed, according to figures for 2000, are mostly bread and cereal (39,5%), vegetables (19%) and dairy products and eggs (13,6%) (Pinton 2001).

To understand the Italian market as a whole, one needs to bear in mind that the picture drawn by raw figures is a simplification disguising considerable internal variations in both production and consumption. Most organic consumption takes place in the cities and in the northern parts of Italy where the highest average income levels are found. Production, however, is concentrated in the south and on the islands.

6.1.2 Regulation, policy and public awareness

In discussions of market opportunities, two hindrances to organic consumption in Italy are often stressed: a general lack of knowledge of the meaning of the term "organic", and confusion due to the great number of quality labels. Today 10 separate organisations are licensed to certify farms against EU standards, each carrying its' own label. On top of this, other types of label indicating food quality and locality are often used in the Italian food market.

Public awareness

In a survey of 3500 households, 54% were characterised as having a very low level of information and confusing organic products with "natural", "low-input" "wholemeal" and "macrobiotic" products. 15% of these believed that "organic" meant something Italian, and that imported food could not be categorized as such (Pinton 2001).

Promoters of the organic sector who, in spite of the low level of organic awareness in Italy, adopt a positive attitude base their expectations on indications that the Italians take environmental issues seriously and wish for both stronger legislation and high quality products without pesticide residues (Compagnoni, Pinton and Zanoli 2000; Cicia 2002; de Stefano *et al.* 2000; Sassatelli and Scott 2001).

Two suggestions as to how organic consumption might be encouraged have been made. One is to somehow increase the general level of knowledge and information for example by setting up campaigns for organic food and production (Pinton 2001). The other suggestion is to introduce a more uniform national framework of certification and labelling (Compagnoni, Pinton and Zanoli 2000:177)

As mentioned above, many producers do not market their products as organic. There are various reasons for this. Some farmers are under conversion, others are interested in the subsidies but not in the organic label, yet others make use of mostly local sales where personal assurances might be more important than the label of certification (Santucci 2001). Reluctance to market food products as organic can be seen as both a consequence of the ignorance among consumers and as upholding the ignorance and the lack of interest in supporting specific organic values.

6.1.3 Distribution

Until recently, most organic consumption took place through small specialty stores or cooperatives and local markets (Santucci *et al.* 1999; Compagnoni *et al.* 2000). The market for organic foods in supermarkets has been growing steadily since its introduction in the beginning of the 1990s. Accounts show that in 2000 the number of supermarkets with an organic section, as well as the market share of organic food in supermarkets, exceeded that of specialised organic shops (Pinton 2001).

Table 6.1: Number of organic shops and supermarkets with organic foods, Italy

Year	1996	1997	1998	1999	2000
Organic shops	771	713	824	918	987
Supermarkets	130	193	357	624	1439

Source: Pinton 2001/Bio Bank

Table 6.2: Relative market share of distribution channels of fruit and vegetables, Italy

Distribution channel	1996	2000
Direct from producers	35%	15%
Specialised shops	55%	40%
Supermarkets	10%	45%

Source: Pinton 2001

This tendency of growth in organic supermarket sales to some extent reflects the general trend in the conventional food market towards a more intensive and standardised market within which national and international supermarket chains operate. At the same time there is evidence of a growing interest in alternative distribution channels. There are today six large-scale retail trade sites where one can shop online. According the latest data from Bio Bank (an Italian organisation that collects data on organic agriculture and consumption), the num-

ber of organic open-air markets is also increasing. This development seems to contradict the trend presented in the table above. This inconsistency must be seen as a result the fact that alternative distribution is fairly difficult to monitor.

The dual development of the organic food market seems to parallel more general changes in the food market. In a study of the marketing of organic food in Italy, Santucci *et al.* (1999) state that two general trends exist, and these also affect the organic market. One is towards mass production, high turnovers, the standardisation of products, mega-markets and multinational companies. The other is towards products with higher prices. These trends coexist and are created by the same consumers to different degrees, depending on cultural and socioeconomic factors. The authors point out that the latter trend is the one on which organic farmers and producers position themselves. But the cases of Denmark and the UK suggest that the growing supermarket supply of organic food will lead to some degree of normalisation and industrialisation of organic food consumption and production.

6.2 Organic consumption

6.2.1 Research on consumers and organic foods

We have been able to locate only four Italian studies focusing on food consumption in which background information, the design, and the results, were laid out in a way that made it possible for us to judge and present these. In addition to these four studies, we will include results from studies that are referred to in articles but unavailable to us.

Canavari *et al.* (2002) present preliminary test results of a study of the way in which an increased awareness of food safety can influence consumer behaviour regarding specific products. They look at consumer attitudes towards organic apples, examining the relationship of price, quality and quantity; and they analyze the structures determining willingness to pay for pesticide elimination and willingness to pay a premium price of organic apples. The data are collected not merely from consumers of organic food but consumers in general, whether they actually prefer organic food or not. As such the study is somewhat outside the scope of the current project, which is to detect the concerns among people who actually buy organic food. Nonetheless we have included the study because it might add to the overall picture of attitudes to organic food.

Cicia *et al.* (2002) attempt to model preferences regarding qualitative and quantitative attributes in regular consumers of organic olive oil. They do so by using an experimental (fractional factorial) design using a sample of 198 consumers.

Santucci describes the demographic characteristics and purchasing behaviour of 100 consumers in an organic shop and 100 consumers in an organic market.

Finally, in their study of consumers' values relating to organic foods in general, Zanoli *et al.* (2002) use qualitative interviews and a "hard laddering technique" to derive maps of respondents' cognitive understanding of values relating to organic food. The study is based on interviews with 30 consumers from an organic consumer cooperative and 30 generic consumers.

All four studies are based on questionnaires and use a quantitative approach. The study undertaken by Zanoli *et al.* (2002) employs what could be called a semi-qualitative method in which data are obtained qualitatively through interviews and questionnaires and then analyzed quantitatively. Some studies aim to describe the organic consumers and their behaviour by directly observable variables such as age, income and buying frequencies (e.g. Santucci *et*

al. 1999), whereas others analyze more intangible factors such as preferences and values (e.g. Zanoli *et al.* 2002).

In all the studies, the samples are relatively small and the data are collected in food stores on the basis of random meetings with shoppers passing by. The studies also focus on certain types of shop (supermarkets, health food stores and an open air markets) and specific areas (Naples, Perugia and the Emilia-Romagna district). In two of the studies, the respondents are consumers in general. In the study of Circia *et al.*, they are specifically defined as "regular consumers of organic food" (RCOF), and in the study of Santucci they are approached in an organic food market and a "specialised retailer", and it is assumed that they are consumers of organic food. Two of the studies deal with a specific product, i.e. respectively, olive oil and organic apples (Cicia *et al.* 2002; Canavari *et al.* 2002). The other two studies deal with organic foods and non-foods in a general sense.

These restrictive design features entail that the four studies are representative neither of organic consumers in general, organic foods as a whole, nor food consumers as such. Some of these limitations are acknowledged by the authors themselves. Thus Zanoli *et al.* (2002) characterise their study as exploratory and not representative of consumers in general and Canavari *et al.* (2002) present their work as a preliminary study leading to a larger project.

Table 6.3: Empirical studies, Italy

Article	Method	Respondents	Product	Approach	Dependent variables	Explanatory variables
Canavari *et al.* 2002 [2001]	Survey (Preliminary test phase of survey)	346 customers 4 of large conventional outlets (Bologna and Reggio Emilia)	Fruit: organic apples	Behavioural (Self reported)	Price-quality-quantity (WTP)	Demographic and socio-economic characteristics Purchasing frequency
Cicia *et al.* 2002 [1998]	Survey Experiment Fractional factorial design	198 regular consumers of organic food in organic food store (Naples)	Virgin olive oil	Behavioural/choice (self reported)	Choice of product	Price, origin, certification label, turbidity
Santucci *et al.* 1999 [1998]	Survey	200 100 customers in and organic specialty shop, 100 customers at an organic market (Perugia)	Organic foods and nonfoods	Behavioural	Choice of distribution channel: Shop-consumers and marked consumers	Residence Profession Information of shop/market Frequency of purchase
Zanoli *et al.* 2002[30] [2000]	Qualitative, hard laddering technique Interviews (Exploratory)	60 30 consumers in organic specialty shop, 30 generic consumers. All responsible for household food purchase (Area unknown)	Organic foods	Cognitive, means and end chain	Consumer values (exploratory)	Experience (frequency of purchase) Knowledge (expertise)

[30] For a full account of the study and the results see Naspetti, S (2001): "L'analisi motivaziolnale nel marketing ecologico: il caso dei prodotti biologica", an unpublished PhD thesis, University of Ancona

Before continuing with the presentation of results, we need to enter an important reservation with implications for the interpretation of those studies that are based on self-reported behaviour. As already mentioned in Section 1.2, general lack of knowledge about, and awareness of, organic foods is widespread among Italian consumers, and there is also some confusion about the more specific meanings of terms, labels and claims in this area. This can lead to unreliable results in studies based upon the collection of data by verbal report in which conclusions are drawn from the responses of consumers who believe that they are buying organic foods, but are not in fact doing so. In one study it was found that 37% of respondents erroneously believed themselves to be consuming organic food (Santucci *et al.* 1999).

6.3 Buying behaviour

Owing to the lack of quantitative studies of organic consumption in Italy using larger samples, the picture of buying frequency of organic foods is no more than suggestive. More data are needed if more accurate figures are to be arrived at.

The study by Canavari *et al.* (2002) of 346 consumers in conventional supermarkets offers a profile of the respondents. 75% of these have bought at least some organic food. We have come across two other articles that refer to surveys of buying frequencies. According to these, 70% of Italians know of the existence organic food, 40% have purchased organic foods at some point, and 29% buy organic food occasionally.

Table 6.4: Buying frequencies, Italy

Source	Buying frequency
Compagnoni *et al.* 2000/Largo Consume Number of respondent: not given	70% know of organic foods 40% have purchased 4% purchase regularly
Pinton 2001/ISMEA-Nielsen CRA Number of respondents: 3500 households	29% buy occasionally 5,6% buys at least once a week 1,3% are "well informed self declaring consumers of organic products.
Canavari *et al.* 2002 Number of respondents: 340	Purchase of organic food stuff: Yes: 75% No: 25% Purchase of organic fruit: Never: 29.4% Seldom: 41.8% Often: 22.1% Always: 6.8%

In his smaller study of 200 consumers in the city of Perugia, Santucci differentiates types of consumer by purchasing behaviour. On the basis of responses from 100 market-goers and 100 consumers in a specialised organic retail store, he finds that consumers in the shop are more regular, price conscious and buy a wider range of products. The market-goers buy organic food less often. Santucci concludes that the market does not have the potential to attract a steady flow of organic consumers, but that it is an important tool for promoting organic consumption, since many tourists come to the market. One must bear in mind that, with a sample of 100 respondents in each category, this finding cannot be generalized to a larger population of organic consumers.

6.4 Consumer descriptions

Studies focusing specifically on organic consumers often start out by presenting a picture of the "average" or "typical" organic consumer.

In a study of preferences in purchases of organic olive oil, Cicia *et al.* (2002) interviewed 198 people at the exit of organic specialty stores in Naples. The criteria for participation were that the consumer had visited the store and had bought at least one organic product. 64% of respondents were found to have bought organic products at least once a week. The sample was characterised as "regular consumers of organic food" (RCOF).

In this study the average consumer was estimated to be 40 years old, to live in a family of four, to have quite a "high level of education", and to have "good professional status" but a low-to-medium income. RCOF was characterised as a homogeneous group. Its members differed from conventional consumer in being "lifestyle consumers". By this is meant that organic food consumption is connected with alternative lifestyles such as vegetarianism, environmentalism and alternative medicine. Some uncertainties and inconsistencies appear in this study. The fact that ROCFs are estimated to have good professional status but lean towards low income is one example. Hence some of the definitions used in the study are unclear.

The finding on income conflicts with results from a survey undertaken by the marketing magazine "Largo Consume" (Compagnoni *et al.* 2000). Here the average consumer of organic food is estimated to belong among the upper-middle or upper income bracket. He or she has an average or higher than average level of education, is 30-45 of average age and lives in the large cities or towns in the north.

The 200 respondents in the Santucci study (1999) also have a good level of education. Santucci finds that a majority (61%) are women, but that (unlike respondents in the study of Cicia *et al.*) the average respondent lives in a family with less than four members. In general terms, Santucci describes Italian organic consumers as "relatively rich, with a good level of education, to some extent ecologically conscious, afraid of pesticides and other chemicals" (p.214).

Table 6.5: Consumer descriptions, Italy

Source	Gender/Age	Children/family	Income	Education
Cicia *et al.* 2002 "Regular consumers of organic food"	40 years old	Family of four	Income low or medium	Education level quite high (50% high school, 40% Bachelor)
Compagnoni *et al.* 2000 "Average consumers of organic food"	30-45 of average age	-	Upper middle or upper income bracket	Average or higher than average education
Santucci 1999 "Clients of specialised retailer and of organic food market"	Majority of women (61%)	Family with less than four members	16.000-30.000 Euro	Good level of formal education

6.5 Consumers' concerns

An ideal way to present a summary of consumers' attitudes on issues concerning organic food would be to present the various results by theme in order to view the total picture. However, owing to the considerable dissimilarities in sample profiles and question types, a presentation of this sort is not feasible. In the following we will therefore go through those of the studies that have considered the issue of consumer concerns and responses to organic food. We shall then try to summarise these in Section 3.

Canavari et al. 2002

In the study conducted by Canavari *et al.* – which, note, deals with attitudes among consumers in general and not necessarily with consumers of organic food – WTP (Willingness to pay) is used to measure consumers' attitudes to pesticides and to organic apples. Respondents were asked hypothetical questions concerning purchasing choices, and it was found that 70% had never or only seldom bought organic fruit.

The study reveals that 92% of respondents were willing to pay some amount of money to eliminate chemical pesticides. 75.2% would pay up to 50 Euros a year, and 24.8% would pay more. Those who were not willing to pay to eliminate pesticides where either sceptical about the hypothesis itself, namely that it would be possible to eliminate pesticides altogether, or believed it to be a right to have access to food without pesticides without paying more for it. Among those who were willing to pay, the majority (76.5%) were motivated by both health and environmental reasons. For 21.3% health reasons alone were the motivation, and for 1.61% environmental reasons alone were the motivation.

One interesting conclusion one can draw from this study is that everybody is interested in eliminating pesticides if their opinion is not conditioned in any way. The WTP-approach adopted in this study gives some idea of the weight of this interest. Interpreting WTP data, one must bear in mind, however, that the value of money is relative to characteristics of the person spending it – that is, that person's economic resources and situation as well as his or her culturally and socially determined way of valuing material goods. It is also interesting to learn that when respondents reply that they are not willing to pay for pesticide elimination, this is not because they disagree with pesticide elimination, but because they are more concerned, sceptical or realistic about the pesticides than other respondents are.

The Canavari *et al.* study invites a number of critical questions. How much explanatory power do the data in this study actually possess when only a minority of respondents buy organic food regularly? Again, most answers are hypothetical and based on how respondents *think they would react* to higher prices, pesticide free food products, and lower quantity. It is possible to doubt the importance of the issue to respondents, since most are normally content buying conventional products. And when the authors claim that the image of organic agriculture is rather positive, that tolerance of the appearance of the fruit is high, and that most people are interested in eliminating chemical pesticides, the reader is left asking why so few actually purchase organic fruit.

Cicia et al. 2002

In their study of values relating to attributes of organic olive oil, Cicia *et al.* conclude: (a) that price and origin are seen as proxies for quality, and that the consumers are prepared to pay more for that; (b) that the most well known labels are preferred; and (c) that appearance is not relevant. In view of some questionable features of this study's design, these results should not be accepted uncritically.

First, the design is experimental. This implies, among other things, that results are based on self-reported responses to an envisaged purchasing situation. The respondents were asked to

rank nine product profiles in respect of four product attributes: geographical origin, certifying body, outward appearance of the product, and price. However, in the process of operationalising the research questions (which involved the categorization of preferences for the purpose of quantitative analysis) some of the qualitative traits that the authors wished to measure tended to lose their content. An example of this is the attribute of *appearance*, which was measured using two values: turbidity and clarity. In an experimental design in which the real object is not present it is hard 0to imagine that respondents would pay much attention to this value, since they are not holding the object in their hands. The same goes for the attribute of *price*, and to some extent *origin*. Respondents can be expected to be less concerned about price in an imagined situation, and it can also be anticipated that they will tend to opt for a label that seems well known at first sight. In short, in an experimental design of this kind, the contextual factors that would normally influence purchasing decisions and selection are missing. The actual context of shopping, on the other hand, usually involves the assessment of a given product in relation to one's budget, a conception of average prices, the comparison of a product and alternatives that might be considered, holding the product and thus getting sensory information about weight and appearance, and not least envisaging the situational context in which the product will be used.

Let us turn to a second critical issue raised by the results of this study. The operational definitions Cicia *et al.* deploy are inexplicit and can seem arbitrary. This renders the conclusions, and any attempt to generalize from the study, questionable. According to the operational definitions reported in the article, the respondents are more likely to be "potential buyers of organic olive oil" than "regular consumers of organic food". A critique along similar lines is that the conclusions build on frail operational measures. Conclusions about the relation between price, origin and preferences regarding quality are drawn, but the study offers no explicit measure of "good quality". Instead conclusions build on implicit, presupposed relations such as the following: "it is often claimed that [geographical origin] is used by consumers as a proxy for quality" and "price preferences display a pattern that we argue to be consistent with the fact that most consumers regard price as a quality sign" (p.212).

Santucci 1999

Santucci's study aims primarily to describe the characteristics and behaviour of consumers in, respectively, a shop and a market. Little attention is given in it to consumers' responses to organic food. However, Santucci finds that when asking consumers, the more regular consumers of organic food, i.e. those who do their shopping in the store, are more reluctant to pay a premium for organic produce than market-goers, who buy organic food only occasionally.

On the matter of trust, Santucci finds that consumers are more prone to trust the seller, or the owner of the shop or market stall, than they are to trust an organic label or certification body.

Zanoli et al. 2002

Results from the study by Zanoli *et al.* show that organic products are associated with health and tastiness. Health, well-being and pleasure are considered by the respondents to be the most important values when they chose to buy organic. On the negative side, organic products are perceived to be difficult to find and to be expensive.

The authors differentiate between "frequent users" (who buy organic food more than once a week, n=35) and "occasional users" (the rest, n=18)[31]. Frequent users were more idealistic. They were, that is to say, altruistically concerned about the needs of others and concerned about the environment. But they were also less inclined to pay a premium for organic prod-

[31] Six respondents were missing or not known (and one respondent is missing from this calculation in the article, p.648).

ucts. Occasional users were described as having hedonistic values and being preoccupied with personal satisfaction. They sought tasty products that look good. Negative features, according to this group, are poor appearance, lack of availability and the belief that it is time-consuming to shop for organic food.

The conclusion of the study is that lower prices, better distribution and tasty and easy-to-use products would increase demand for organic foods. It also emerges that consumers want to be able to choose food products with more freedom, and with more knowledge of the way in which organic production and processing can be distinguished from their conventional counterparts.

Table 6.6: Consumer concerns, Italy

Source	Concerns	
Canavari *et al.* 2002	Environment	70.1% believed that organic agriculture has a strongly positive effect on the environment. 2.8% believed it has no effect or a negative effect 92,58% are willing to pay to eliminate pesticides 44,7% are willing to pay up to 25 Euro a year 30,1% are willing to pay between 25-50 Euro a year
	Health and the environment	Motivation for the wish to reduce pesticide use: Health 21,19% The environment 1,61% Health and the environment 76,45%
	Appearance	8.7% said that bad-looking fruit would negatively influence the purchase, 62.5 said that it would not.
	Trust	16.6 had total confidence in quality indicators 50.6 had moderate confidence in quality indicators 30.2 had little or no confidence in quality indicators 2.7% had never seen any quality indicators
Cicia *et al.* 2002	Appearance and quality	Appearance is not relevant Price and origin is seen as a proxy for quality
	Price	Consumers are prepared to pay more for good quality
	Trust in labels	The most well known labels are preferred
Santucci 1999	Price	More regular customers find higher premiums less acceptable.
	Trust	50% trust the seller or owner 35% trust the certification body The organic labels are less important
Zanoli *et al.* 2002		Health Availability/price Tasty and good-looking products Knowledge to guide choice

6.6 Main findings and future approaches

Taking into account both the strengths and the weaknesses of the studies reviewed above, we now offer some tentative remarks on Italian concerns about organic food.

With regard to eating quality:

- Appearance and taste are reported to be of importance for choosing organic food. According to consumers in three of the studies (Zanoli *et al*., Canavari *et al*. and Cicia *et al.),* taste and quality were important attributes. Two studies (Canavari *et al.*

and Cicia *et al.)* appear to show that Italian consumers are not fussy about the appearance of products. It might be suggested that Italians use other quality measurements when it comes to food, but this suggestion would of course need to be substantiated. In the study by Zanoli *et al*., appearance was important to occasional users of organic products. Future studies ought to provide more information about the concept, and measurement, of food quality.

With regard to other aspects of quality, importance is attributed to:

- Health and the environment. Health is important to the majority of the consumers, and this issue might be even more prominent than environmental issues in Italians' self-perception of their reasons for buying organic food (Zanoli *et al.* and Canavari *et al*.). However, this generalization requires further investigation, and in particular greater insight into the meaning and significance of health is needed.
- Ethical issues. Two of the studies also emphasise that consumers who buy organic foods tend, in general, to be more ethically concerned and idealistic than conventional food buyers. The pattern seems to be that regular consumers of organic food are more altruistic and environmentally concerned than occasional buyers. The latter, on the other hand, seem to be more interested in personal satisfaction and the product's visible and gustatory qualities (Cicia *et al*. 2002, Santucci 1999, Zanoli *et al.* 2002).
- Origin of the food. One study indicates that consumers view origin of the food as a proxy for quality.
- Regarding animal welfare, this is an issue absent in the reviewed studies. In one article, in which consumer concerns are summed up, it is mentioned that animal welfare concerns are almost unknown to Italian consumers – a situation very different from that in Denmark and the UK, where this concern is significantly related organic food consumption (Zanoli and Naspetti 2002). In future studies it would be interesting to look into national differences in attitudes to animal welfare, and also in attitudes to other ethical issues such as social affairs and fair trade.

With regard to safety, worry is expressed in regard to:

- The use of chemical pesticides in agricultural production

With regard to information needs, important issues seem to be:

- Trust. The issue of trust is touched upon in connection with confidence in quality labels. Santucci's study suggests that trust relating to food purchases is more often based on personal interaction with the salesperson than a label. In the study by Canavari *et al.*, trust in labels seems to be moderate. Cicia *et al.* point out that labels that are known are preferred to those that are not. The relative importance attributed to personal trust relations and trust in systems (such as labelling systems) is an interesting issue to follow up with more research. Comparative studies between different countries would be of particular interest. Another important issue related to trust, which has not been covered in any of the reviewed studies is that of fraud. This should be addressed in future research.
- Lack of knowledge. A lack of knowledge of labels and information about the meaning of the term "organic" also figures as a central theme in the studies. Knowledge and information are desired, but at the same time the studies disclose a desire for the labelling system to be simplified (Zanoli 2002, Pinton 2001, Compagnoni 2001). Here, we require better understanding of 1) the influence of knowledge on consumer criteria of choice, and 2) the relation of the labelling system to knowledge.

Consumer concerns are also reported in relation to:

- Price. One study revealed that people are willing to pay for better quality, but two found a negative stance on higher premiums. Zanoli *et al.* and Santucci claim that frequent buyers of organic food are more price-sensitive than other consumers. In considering this result, we suggest, one must bear in mind that regular consumers spend most money on organic food – and so are, in fact, willing to pay higher price for their food. Because of this, regular organic consumers are naturally affected more by the relatively high food prices than occasional users. When the question of willingness to pay is put to regular consumers of organic food, it is linked to reality as an everyday issue. But this question is put to those who only buy organic food occasionally it is rather hypothetical. Another observation about this outcome of the two studies is that regular consumers of organic food are, perhaps, more sceptical about conventional farming and processing methods. They are therefore more prone to insist that one should not have to pay a lot more for food that is free of pesticide residues and environmentally beneficial.

Another issue of interest for future research is:

- How different channels of distribution and perceptions of the safety and quality of organic food might be interrelated. One study indicates some differences between consumers in, respectively, a shop and a market related to perception of price. A range of other issues would be of interest to study more closely, for example whether the characteristics of the distribution channel as such, or the type of trust relations catered for have a bearing on how the organic food sold in that particular way is perceived by the customers.

In conclusion, the value of the studies has been limited given the purpose of this review, i.e. the collection of detailed information on personal criteria of organic consumption with a view to detecting critical control points. The research we have examined was undertaken mainly for the purpose of exploring market potential. It was also based on relatively small samples that cannot be assumed to be representative of larger, more generally specified groups of consumers.

Contradictory findings are evident in relation to sensitivity to price, attitudes to appearance, and some of the demographic tendencies. These reflect methodological problems in the studies. We have commented on some of the problems we found in order to illustrate the importance of critical evaluation of this kind of research.

A greater understanding of consumers' responses to ethical issues, and their perception and practices concerning food quality, is required. Progress of this kind might be being made in publications and ongoing projects that we have not been able to include in this review, but to which we shall give references.

7 Case IV: Hungary

7.1 Production and market

7.1.1 Organic farming

In Hungary 7.9% of the labour force is employed in the agricultural sector, which produces 6.6% of GDP (Frühwald 2000). Hungary is described as still being an agricultural country. Its potential agricultural area is around 9 million hectares, but the total area now utilized for agricultural activity is around 6 million hectares.

In 2002 the organically cultivated area in Hungary was 103, 672 hectares, constituting approximately 0.7 per cent of the agricultural land. The number of farms was 1309, of which only 193 were small-scale farmers (Roszík *et al.* 2002). The equivalent numbers for 1999 was 34500 hectares, i.e. around 0.5% of the agricultural land. There were 451 organic farms. Most were 20-70 hectares in size, although in the South East, where the topsoil is very good, the average farm size exceeded 200 hectares (Frühwald 2000). According to a USDA Foreign Agricultural Service report (Nemes 2002) organic production in Hungary was expected to grow by one third to over 80000 hectares in 2001. As the numbers for 2002 indicates, the anticipated growth has been met and is continuing. The growth rate from 2001-2002 was reported to be close to 31% for inspected land area, and 30% with regard to number of enterprises (Roszík *et al.* 2002).

Hungary's crop production is mainly limited to grain, particularly wheat. Medicinal herbs are also cultivated, as well as some fruit and vegetables, legumes, seeds (sunflower, pumpkin), corn and honey. Animal husbandry is of minor importance.

In 2002 there were 192 processors, packers and traders and 5 importers (Roszík *et al.* 2002). It is not clear whether these enterprises are fully organic or if they also are engaged with conventional products. Prior to this, there were only a few organic processors, wholesalers and other trade organisations. According to the report published in 2000 (Frühwald 2000), there were 16 fully organic processors, wholesalers and export companies, most of which are inspected by *Biokontroll Hungaria*, some of which are inspected by the Dutch body *SKAL*. At this time there were no fully organic retailers (all organic retailers also traded conventional products).[32]

The size of the domestic market is estimated to be about USD 1 million, and about half of domestic consumption is baby food made a single company (Nemes 2002).

Organic production in Hungary is heavily export-oriented, with about 95% of the organic products shipped abroad. Shortly after the *Biokultúra-Klub* was started in 1983, the export

[32] Source: Organic Market Review for the Avalon Foundation by Geza Varga, up-dated by Ferenc Frühwald 1999

organisation *Natura WG* was established. Export possibilities and contacts with the organic sector outside Hungary encouraged the first state farms to convert to organic agriculture as soon as Hungarian trade companies were founded.

State support has targeted exports. The inclusion of Hungary on the EU third country list[33] under the EU-regulation 2092/91 in 1996 facilitated exports to EU member states.

Historically the first target market for Hungarian produce was Holland. Dutch traders started to import Hungarian products in the period 1986-1990, and these products were often then traded to Germany, Great Britain and Scandinavia. Since 1990 the order of importance of the export countries has changed. Here we list them in declining order of importance: Germany (40%), Austria (25%), Switzerland (20%), Holland (10%), others, including USA and Scandinavia (5%) (Frühwald 2000). The overall export volume in 1999 was estimated at 15.4 million Euros.

According to the USDA Foreign Agricultural Service report on organic production in Hungary (Nemes 2002), Hungary exported USD 8.2 million in organic crops (mostly wheat) in 2000.

The domestic market is small. Some European countries are allowed to certify organic products for export to Hungary. The suppliers here are mainly EU countries. Outside of the EU, only Switzerland, Slovakia and Poland export organic products to Hungary (Nemes 2002).

There is little marketing activity in Hungary, and the country has, in essence, no general, established market for organic products. This means that only products that have been preordered, or at least requested, are produced (Frühwald 2000). Export is targeted. Production does not aim to fulfill local market needs.

The area under organic production increased until 1992 (when it was 3330 hectares). There was then a dip (to 2540 hectares) in 1993, following privatization measures. After 1995, the number of farms and proportion of organic land increased rapidly as a result of improved export possibilities. This increase in land area under organic production has continued, with a 67% increase from 2000-2001 (Biokontroll Hungária Kht. 2002), and a 31% increase from 2001-2002 when 103 672 ha were under organic production (Roszík *et al.* 2002).

The effect of export success is described as having a "Janus face". On one side, demand from abroad is positive and encourages the development of production, while on the other side, it retards development in the domestic market. Export markets usually offer significantly higher prices for organic products, and this in turn increases domestic prices to the degree that they are perceived as too expensive by most Hungarian consumers. Large farms dominate the export-oriented organic sector, and small farms find it difficult to develop markets for their products (Frühwald 2000).

7.1.2 Regulation and policies

State support

Hungarian state support, which is aimed at exports, has included efforts to become accepted by the EU as a third country and to establish a Hungarian inspection system that accords with

[33] In August 2002, the second list is made up of: Argentina, the Czech Republic, Israel, Hungary, and Switzerland, though Hungary has only admitted Swiss Imports. Hungary itself is accepted by the EU on this list for only plant products. Hungarian animal products exported to the EU are subjects to case by case approval (Nemes 2002).

EU regulations. Substantial support for marketing has accompanied these initiatives. But the development of the domestic market has not been supported by the state. Since 1998, direct financial support has been available for organic farmers.

During the period 1997-1999 Hungarian subsidies were not sufficient to compensate for the extra costs and income losses of farmers who had converted to organic production. Support was only given in the transition period, and already converted farms were not included in the support scheme (Horvath 2003).

The National Agricultural Environment Protection Plan, which was partly implemented on January 1st 2000, has been of importance for the development of organic agriculture in Hungary. This plan includes environmental protection in the agricultural policy and support systems; development of the support system for the conversion into organic farming in order to reduce increased costs in the transition period; emphasis on future education; and encouragement of environmental consciousness by farmers (Horvath 2003).

Organisations

Organic agriculture in Hungary started in the 1980s. In 1983 the *Biokultúra-Klub* was founded in Budapest. This was the first organic agriculture organisation in Central Eastern Europe. According to Frühwald (2000: 145), its members consisted mainly of "weekend gardeners, environmentalists and people interested in natural healing methods or who simply wanted to follow a different way of life". *Biokultúra* became member of IFOAM in January 1987 as the first member from Central Eastern Europe. *Biokultúra* has 48 regional sub-organisations and six sub-organisations in neighbouring countries. The *Biokultúra* advisory body *Bioszaktanácsadó* was founded in 1997. It provides advice and assists farmers in making conversion plans and applying for subsidies.

In 1987 *Biokultúra Egysület* was officially registered as an association for organic agriculture, environment and health.

The *Organic Agriculture Information Centre* in Budapest was established with EU funding at the beginning of the 1990s. This centre provides information for farmers and consumers, and has an extensive collection of literature on organic agriculture.

Certification

Biokontroll Hungária GG, which has operated since 1996, inspects approximately 90% of Hungarian organic production. The inspection and certification of Hungarian organic production complies with two basic regulations: The IFOAM standard; and the EU regulation EC 2092/91. Foreign certifying organisations may work in Hungary if they meet government requirements and are registered. Before *Biokontroll Hungária GG* was operative, inspections were carried out by the Dutch inspection body *SKAL* (called *SEC* before 1992). After Hungarian organic products had entered the European market, other Western inspection organisations increased their activities in Hungary (Frühwald 2000).

Hungary has been on the EU third country list since 1996 (when the *Biokultúra* inspection system met EU Regulation 2092/91). This facilitates exports of organic products to EU member states.

Formally, the Plant Health and Agro-Environmental Department in the Ministry of Agriculture gives approval for registration.

7.1.3 Distribution profile

Organic products in Hungary are mainly sold through "reform houses" (health food shops) and drug stores. Approximately 25 conventional retailers and 12 natural food shops in Budapest regularly sell organic products. The majority of consumers who buy organic food do so in specialised shops where organic food is sold as well as "health food". The new dominance of supermarkets and hypermarkets is seen as a challenge to the availability of organic food, because smaller, specialised shops in their vicinity, which have been the major channel for organic food, tend to go bankrupt and disappear when the larger outlets begin trading.

Various problems are connected with the marketing of organic products through the supermarkets. They include the fact that supermarkets in Central Eastern European countries operate with a delayed payment system, which is unsuitable for small farmers; and the fact that organic farmers have difficulties meeting requirements to deliver homogeneous quality and products of the required assortment on schedule.

The *Biokultúra* association has organised marketing seminars with the help on the German organisation *Grüner Zweig*. Excursions have been made to Germany, Switzerland and Austria to study direct marketing.

7.2 Organic consumption

Little specific research on organic agriculture has been conducted. Other than some theses and dissertations, we were able to find reference to just one consumer study.

"Lack of demand" is referred to as a hindrance to development of the domestic market in Hungary (Frühwald 2000). However, consumers' limited purchasing power is often cited as the main reason of the slow development of the domestic market. This is felt to be a problem in all Central Eastern European countries (Frühwald 2000).

In general there has been little specific research on organic agriculture except some theses and dissertations (Frühwald 2000). One specific consumer study related to organic food has been reported (Kürthy-Baricz 1996 in Frühwald 2000). This study was based on interviews with a non-representative group of consumers. Its results indicate that personal health is a more important purchasing factor than environmental concern. One suggested reason for this is that consumers do not believe that agriculture is a major polluter of the environment (Frühwald 2000).

According to the Kürthy-Baricz study, customers who are on special diets or are vegetarian are more precisely informed about what "organic" means. They are generally more conscious of and informed about the certification system, and they care more whether a product is certified or not. They have a greater preference for organic quality when they buy food. The study shows that consumers of organic food generally have higher levels of education and higher incomes, and that their age range is between young and middle-aged (the matter is not specified further). The majority of consumers of organic food buy in specialised shops where both organic products and "health foods" are available. In general, customers in specialised health food shops are younger with a higher education and/or higher income. Less than 30% of those interviewed by Kürthy-Baricz said they consumed organic food more or less regularly, but Frühwald (2000) remarks that this is probably not representative of the population in general, given the limited domestic availability.

There is also mention of other surveys by Frühwald (2000), but details of these (authors, dates etc.) are not given. According to Frühwald, the results from these surveys indicate con-

sumer uncertainty about the meaning of the term "organic". When asked if they would appreciate chemical-free food, more than 70% answered positively, while positive answers to whether they would like to consume organic products were less than 30%. Results from these studies also indicate that Central Eastern European consumers of organic food, unlike Western such consumers, are mainly vegetarians, or at least health food consumers (Frühwald 2000). It has been suggested that this is because the discrepancy between a "healthy diet" and traditional eating patterns is greater in Eastern European countries than in Western European countries (Frühwald 2000).

7.3 Other studies of relevance

Since so little research is available for Hungary, we would like to include a few market descriptions from some other Central Eastern European as well as Baltic Countries[34]. Although the very limited number of studies on consumer attitudes to organic food is common to all of these countries, it may be of value to look at the sketches of the market trends together. These countries may have certain cultural consumer trends in common, and they are comparable, since they all have under-developed markets for organic products.

In the *Czech Republic*, organic farming constituted 2,5% of the total agricultural area in 1999 and most of the organic production was at that point sold as conventional food (Zidek 2000). The first real marketing activity started at the end of 1999, when the supermarket Ahold launched an organic beef project (Zidek 2000). Other products are sold only locally. About 200 shops, supermarkets and health food stores sell organic products such as cereal products, peas, herbs and spices, wines and cheese. Fresh fruit and vegetables are available only in a few shops, and milk, eggs and meat are sold only on farms. The Ministry of Agriculture keeps a list of producers that is available to the public through the Internet. Good processing and marketing possibilities are reported for cereal products. There are more than 100 different certified processed products based on cereals. These are sold in health food shops. According to Zidek (2000), there has so far been no research interest in organic farming. We were not able to find any studies of consumer attitudes to organic food.

Slovenia has a total agricultural area of 38,7%, of which 0.38% was under organic production in 1999 (Slabe 2000). A market for domestic organic products started to develop at the end of 1998. Following the certification of the first farms, organic products were promoted for the first time at the "Nature-Health" fair in Ljubljana in the autumn of 1998. The media response was very good, as a certain demand for organic products already existed and certification had been awaited. The major marketing channels are: direct marketing; the organic farmers' market in Ljubljana (vegetables, fruit, grain) mentioned above; sales at conventional markets; and sales to health food shops. The main products sold are: non-processed farm products or lightly processed products such as wine, vinegar, juice, seed oils, cheese and a few meat products. There are no exports of certified organic products from Slovenia. Slovenia has an attractive and well-preserved natural environment with several conservation areas, and the possibilities for linking organic farming to tourism are discussed by Slabe (2000). One point of view is that Slovenian agriculture is unable to compete with cheaper production from other countries due to natural conditions and the structure of the agricultural sector. A possible path of development for organic agriculture in Slovenia is therefore to produce high quality food products primarily for the domestic market and for tourist consumption. (Slabe 2000)

[34] This is mainly based on country reports provided by Stiftung Ökologie & Landbau (SÖL), Bad Dürkheim, Germany. (http://www.organic-europe.net)

In *Poland*, where 59% of the total area consists of farmland, the number of organic farms accounts for only a small fraction of the total number of farms (0.03%). The organic agriculture movement started in the 1980s. It is reported to be largely motivated by, and responding to, growing public awareness of ecological issues (Metera 2000). Organic products were offered in Warsaw shops as early as 1989. By the year 2000, about 200 shops all over the country were selling a wide assortment of both Polish and imported fresh and processed organic products. However, the market share of certified organic food products in the domestic market is very small compared to conventional food products. Some of the products from certified organic production are sold as conventional products, while at the same time shopkeepers are said to be seeking stable supplies of organic products such as fresh vegetables and fruits, dairy products and bread. (Metera 2000).

According to one consumer poll, conducted in 1998 (referred by Metera 2000), 40% of consumers declare that they are ready to buy organic food if it is available in their regular shops. (The Department of Organic Foodstuffs at the Warsaw Agricultural University is reported to having conducted some research on "organic food marketing", but we were not able to obtain this).

In *Estonia*, the total percentage of land used for agriculture is rather small (around 25%) and the percentage of land used for organic agriculture constitutes only a fraction of this (0.4% in 1999) (Mikk 2000). The marketing of organic food is poorly developed and consumers have difficulty finding any organic products in the shops. A large proportion of organic produce is sold as ordinary, conventional fare. The most common marketing channels for organic products are direct sales from the farms, and supply through hospitals, schools, kindergartens and local shops. Relatively few farms sell processed products.

According to the results of a consumer survey commissioned by the Estonian Ministry of Agriculture at the end of 1999, there are indications of a clear consumer interest in buying organic products and a willingness to pay a connected premium of around 10% (referred to by Mikk 2000). Organic agriculture is expected to increase by at least 50% per year during the next few years.

7.4 Main findings and future approaches

Given the very limited consumer research in Hungary, there is evidently a lot of research waiting to be done. Some of the tentative hypotheses raised about the consumer's relation to organic food in Hungary and other Central and Eastern European countries would be very interesting to investigate further. Based on the available reviewed literature, we will summarise what seem to be important aims for future studies in Hungary and related regions.

A first general point is related to *interactions between supply and demand in the market*. Given the low availability of organic food in the domestic market, and the limited numbers of different sales channels, investigations of the factors affecting consumer choice seem to be an important focus. In one of the surveys reviewed, "lack of demand" was suggested as a hindrance to development of the domestic market – although also consumers' limited purchasing power was acknowledged. Particularly in such contexts, it is crucial not to overlook the factors framing the actual choices that consumers have (or perceive themselves to have). This point became very apparent in a comparative study of consumer trust, where a tentative model based on results from Western European countries had to be revised when Russian results were interpreted. "Naive trust" had been used as a category describing the attitudes of Western European consumers. For the Russian results, this category had to be subdivided in

order to differentiate between situations in which consumers *had no choice* but to buy what was available and situations of *chosen* "blind trust" (Berg 2001).

Another question – and one that might have particular relevance in countries with a history of state ownership of farms – concerns the nature of market development and the degree of "consumer-orientation" in agriculture. How do these factors affect communication between various levels of the food system? How are consumers accustomed to orienting themselves regarding food issues? What kinds of information do they expect to receive?

Hindrances on the supply side seem of particular relevance in these contexts, as well as sociological studies related to factors affecting purchasing power and choice of food.

Also related to a general understanding of food choice, it might also be helpful to develop a better understanding of:

- The differences in food culture between Western and Central and Eastern European countries and the possible implications of this for perceptions of organic foods.

With regard to quality aspects emphasised by consumers buying organic food, the few available studies indicate that:

- Health is currently a main focus among consumers. The indications of consumer emphasis on health motives when buying organic food are worth following up. Again, it might be productive to ask what role market conditions – being at an early stage of development – play in consumers' perceptions of organic food. Could different stages of market maturation be associated with different relative emphasis by consumers on various types of motivation?

Another tentative hypothesis put forward in the reviewed literature, that is worthwhile exploring further, regards

- Perceptions of agriculture and environmental problems. There is reference to a general view that agriculture is not associated with environmental pollution. Views about nature and "managed nature" are examples of background factors that are of importance in our understanding of consumer attitudes towards organic agriculture and the significance of organic food to the consumer.

8 Trends in Europe: The Findings of Consumer Studies

8.1 Research on consumers and organic food

There is considerable variation in the amount of research available on different countries and regions. In general, more research has been done on those regions where consumer demand for organic produce is greater. A large majority of the studies aim to measure the frequency of organic purchases and to define marketing segments.

From our case studies it can be seen that a sizable amount of research is available on Denmark and the UK. This research includes large-scale marketing surveys, and quantitative and qualitative research. It covers organic food in general, as well as different types of food product. There is also extensive research on related issues such as animal welfare, consumer perceptions of quality, and safety issues etc. Still, a more thorough understanding of the way in which consumers choose and use organic food in the context of everyday life would be useful. There seems to be a need for better accounts of consumers' perceptions of key concepts in food preference – concepts such as health, safety and food quality – and of consumers' motives and assumptions in buying organic food.

For Italy, much less research on organic food was found, and the little that was located was mostly quantitative. Commonly, in the Italian studies, relatively small samples were used. Some Italian studies recruited respondents from certain types of food shop, and in specific geographical areas, and a limited number of food types were examined. Consumer research on organic food consumption in Hungary barely exists, and the findings we gained access to were at best tentative.

8.1.1 Consumer characteristics and buying behaviour

When considering characteristics of consumers buying organic food, one needs to keep in mind the interplay of several factors. Structural factors, such as availability of products in the various market channels, price, quality and types of product offered, as well as factors relating to attitudes among various actors in the food system, including the values and preferences of consumers, are likely to exert influence simultaneously. In isolation, each of these factors might give a misguiding picture. Nevertheless, a summary of the key findings of the review is given below.

There is a clear tendency to identify younger age groups as the most typical consumers of organic food, while, for example, in the UK, older age groups are also found to be important. (This may reflect that the organic market in the UK is relatively mature: the phenomenon of

older people joining the bandwagon of demand is a known general trend). It could also indicate that other aspects of organic food (like health) are being emphasised. We know that older consumers tend to be more concerned with health, while the younger ones pay more attention to environmental issues etc. Further, there is a clear tendency to find significantly higher levels of demand in major cities than in smaller towns and country areas, and a very clear tendency for there to be significant over-representation of persons with higher levels of education. This differential seems, however, to level out when organic consumption becomes mainstream. Trends with regard to income and gender are less clear, but there is an indication that, in less mature markets, women and those with higher income levels are over-represented.

Denmark and the UK are the most mature markets among our cases. Here a large majority of the consumers are familiar with organic food and have bought it on a more or less regular basis. There is reference to a "core-group" of consumers in both countries. These consumers account for a considerable portion of organic sales. They may also differ from less regular consumers in their relative emphasis on various motivational factors, and in having more clearly defined and cogently pursued motives for buying organic food.

Two main pathways in the provision of organic food are evident both in Denmark and the UK. On the one hand, there is the mainstreaming of organic foods, in which foods are often processed by major food industry companies and sold in supermarkets. On the other hand, there are a variety of decentralised sales arrangements. These usually involve a shorter distance between producer and consumer and are sometimes seen as part of a "local food movement". Conventional, mainstream distribution accounts for the large majority of organic sales, but the locally based channels nevertheless represent a qualitatively different consumer alternative, and are also more widespread in some other countries[35].

In Italy, where the organic market is relatively new, these two distributional pathways can also be observed, but the food market in general is more decentralised, with small-scale food shops having a larger share. There are large regional differences in Italy, where the bulk of consumption of organic food takes place in the North while production is mainly confined to the South.

In Hungary, the development of organic production has focussed on and strongly favours export markets, while domestic consumption is very limited. Higher prices for organic food (partly exaggerated by successful exports), combined with relatively low purchasing power among consumers, make organic food an unrealistic option for the majority of consumers. Organic food is bought in some specialty shops, or directly from the farm, and there are some indications that people suffering from certain illnesses are among the pioneer consumers.

8.1.2 Consumer concerns

We shall now highlight the common themes emerging from this literature review. We will discuss similarities and differences in the four case-countries and, where possible, relate the discussion to other countries as well. The observations we make here will prepare the way for the recommendations for future research to be addressed in Chapter 9.

Conclusions about consumer concerns relating to organic food are most readily and soundly drawn in the cases of the UK and Denmark. The limited research available means that only tentative suggestions can be made about consumer concerns in Italy, and in the case of Hun-

[35] For more on this, see the section "*Two-sided organic consumption and distribution*" under 8.1.2.

gary, since there is even less extant research, any observations must be cautious in the extreme.

Some specific concerns

Some specific issues arise repeatedly in the literature. Whether the issues themselves are formulated by consumers or reflect particular questions that researchers have focussed on is not always clear. When they are raised, however, these issues – which also appear in qualitative studies – clearly resonate with many consumers.

Not surprisingly, the issues to which we refer often relate to the main differences between conventional and organic practices, associated with the use of industrial technologies, artificial fertilizers and pesticides, as opposed to less industrialised methods based on a balance between plant- and animal production.

Pesticide use is of concern to many consumers. The worries here may relate to the environment as well as to possible health effects – i.e. either personal, short-term health or the health of future generations.

The use of food additives is a common concern with consumers, and choosing organic food might be one strategy to limit additives in food, as there are limits on additives in the regulations governing organic food processing.

The issue of genetic manipulation in food production is widely debated in public food discourse in many countries. It is known to be a major consumer concern, and has been found to be explicitly connected with the preference for organic food.

In respect of pesticides, additives and genetic modification, the important point at issue is the consumer's distrust of producers' motives: the perception that these practices reflect an interest in profit rather than the production of good food. Although some research has found health concerns to be an important factor in opposition to the use of genetic modification in food production (Bugge 1995), there is clear evidence that many consumers are not primarily afraid of eating products containing genetically modified material, but rather morally opposed to a technology being introduced to food production for the purpose of benefiting producers (Lekfolkspanelet 1996).

Qualitative research has also provided insights into concepts such as "homemade" and "natural"[36] that are commonly used by lay people to describe safe and healthy food. These concepts appear to pick out, and express a preference for, food that has been produced with little or no use of artificial fertilizers, pesticides, food additives and technologies like genetic manipulation.

The review points to the need to address these issues at all levels in the food production chain, but also to seek the underlying values and orientations that are being expressed through such concerns.

Broad and interconnecting concerns

The review suggests that understanding consumers' relation to organic food is a potentially complex task in which many different aspects might need to be considered. Health, environ-

[36] See, for instance, Wandel and Bugge 1994, Bugge 1995, Holm and Kildevang 1996, Holm 1999.

mental concern, ethics, authenticity and taste, and concerns about the relations between people and nature are examples of broad themes that recur in the literature.

The review shows that consumer concern about food quality and safety embraces broad themes and might be connected with both food production and food processing. The nature of concerns might also vary inasmuch as they might relate to immediate or long-term consequences for health or the environment, and they may be interlinked with other concerns, such as taste or moral issues, for example related to fair distribution.

Conflicting results in the studies might reflect the perspectives chosen by the researchers rather than differences in consumer attitudes. The various concerns are not always defined in the same way in different studies. Some studies operate with a "menu" of different concerns, and it might be a tendency for the respondent to "agree", even if they may not previously have had any particular thoughts about it. It may sometimes turn out to be difficult to substantiate and use such results.

In particular, qualitative studies indicate that consumer concerns are often expressed in overlapping, broad themes. Often consumers say that they are concerned with more than one thing – for example, concern about health and the environment often come together. If the study is designed to deliver a prioritized list of consumer motives, the results may be somewhat artificially constructed, with respondents being "forced" to adopt priorities. As demonstrated above, orientations and concerns must be interpreted with specific contextual frames. We can therefore not expect consistent results across geographical areas, social groups or temporal periods.

Joint concerns about health and the environment

Several studies indicate that organic food is commonly perceived by the general public to be a healthy and environmentally friendly option, and in many cases concerns about health and the environment tend to be interwoven as a motif for buying organic food.

These two concerns can be interwoven in different ways. A typical rationale is that healthy soils, plants and animals are a basis for human health, and that therefore care and concern for any of these environmental factors will also cater for better human health. This way of thinking is not easily captured by ticking off boxes in a questionnaire seeking to rank distinct motivations for "nature/environment", "animals/ethics" or "health". This also makes attempts to classify some motives as "altruistic" and others as "personal", "hedonistic" or the like more complex.

Another example of interwoven themes involves "sustainable eating" and "healthy eating". Here interpretations of the first to a large extent coincide with prevailing advice for the latter (see, for example, Torjusen and Vittersø 1998), and consumer emphasis on issues relevant to either of these motives is often interconnected.

Also, a number of specific issues seem to be connected, by consumers, with both the environment and human health. Examples are again the use of GMOs and the use of pesticides. As already discussed above, these relate to several types of consumer concern, among them health and protection of the environment.

Regarding the relative importance of the two issues – health and the environment – there is some discussion in the literature. There is an indication, for example, in literature on Denmark, Italy and the UK, that the most dedicated, "big-volume" consumers, who regularly buy organic food, put more emphasis on altruistic motives such as environmental concern (al-

though here the reservations mentioned above need to be borne in mind). In accordance with this view, it has been observed in Denmark that health-related motivations seem to have become more central for the "newcomers" among the organic consumers who until recently bought conventional foods. The Italian studies tend to indicate that health concerns are more common than environmental concerns, but they also refer to the importance of environmental concerns, particularly among more dedicated consumers.

Against this, tentative observations in countries like Hungary, where the domestic market is very little developed, suggest that health concerns are dominant among the few pioneering consumers who are at present able to track down and pay for organic food. It is claimed[37] (on the basis of the very limited literature) that consumers of organic food in Central and Eastern European countries are mainly vegetarians and/or health food customers. One hypothesis is that, in this region, traditional eating patterns and what are considered "healthy diets" differ more dramatically than they do in Western countries, and that this might have a bearing on the perceptions of organic food and the association of organic food with "health food" and healthy diets. It is assumed that this association of organic food with health food and vegetarian food may be one reason why organic products of animal origin play a less important role in Central and Eastern European countries than in Western countries.

On the other hand, the Hungarian emphasis on health might be the upshot of a general view of environmental issues: there are indications that consumers in Hungary do not to any great extent see agriculture as a major polluter of the environment. This is referred to as a possible reason for not buying organic food. It might be an important factor in countries with similar perceptions about nature and agriculture. Although it involves speculative hypotheses, the discussion of these issues illustrates the general point that general food culture and general perceptions of health are important background factors for understanding the consumption of organic food.

Environmental concerns

Environmental concerns are central for many consumers with regard to organic food. As mentioned above, environmental concerns were often expressed in association with other concerns, such as those related to health and ethics. Examples of more explicitly expressed environmental concerns are related to consumers' wishes for limited transportation of food in the food system (keeping "food miles" low); limited food packaging; the use of environmentally friendly packaging; and concerns about energy expenditure in the food system in general as well as the use of natural resources.

The amount of attention given to environmental problems in society (locally or as a whole), the mass media and so on is very likely to influence the way in which consumers relate to organic food. In this regard there is an important difference between Denmark and Norway – two countries that are similar in many respects, but with different environmental issues on the public agenda. Differences in the perceived "urgency" of problems such as ground water pollution are thought to be an important background factor in explaining differences in the organic market. Perceptions of the role of domestic agriculture in causing or mitigating environmental problems also seem to influence consumer perceptions of organic food. Countries like Hungary – where it appears that agriculture is not perceived as an important polluter of the environment – might have something in common with Norway, where there also are perceptions of both the natural environment and cultivated land and as "clean" and "virgin-like".

[37] This is based on Frühwald (2000), a national report on organic food in Hungary (www.organic-europe.net).

Health concerns

There is a consistent finding that the consumer's choice of organic food is related to some kind of health concern, but there are large gaps in our knowledge of how, and in what contexts, consumers relate organic food to the *various aspects* of health. When interpreting results on health concerns, it is important to know what kinds of definition of health are being employed. This is not always evident in the studies we have examined – and obviously, it cannot be assumed in advance that researchers and respondents or interviewees have the same thing in mind when they use the world "health".

Many analytical interpretations of health are available. Definitions may be narrow or holistic; they may refer merely to the "absence of disease", or reach much wider, as does the definition used by WHO (1958), which includes "bodily, spiritual and social well-being". Perceptions of safety and risk are central issues in much consumer research and in more general research in social science. Sometimes health concerns are conceptualized narrowly in terms of safety, but often it is likely to be more fruitful to treat health as a broader concept. Qualitative consumer research strongly suggests that health is usually understood by lay people in very broad terms. (For a further discussion see, for example, O'Doherty Jensen *et al.* 2001).

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 definition of health will affect the availability of a conclusion of this sort, because when a broader concept of health is used the two concerns are more likely to be run together.

The examples mentioned above (of consumer concern about pesticides and GMOs) suggest that consumer concerns relate in part to safety, in the sense of environmental protection, but very much more to quality, in the sense of products that are free of unwanted residues, additives or organisms. One interpretation of this asymmetry is that the health issue here rests on a conviction that these things are not "good for us" (do not enhance our health), not a fear of becoming ill as such. 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.

Some studies indicate that health concerns have in general become more serious and widespread among the public. An example of this comes from the UK, where analyses of food marketing conclude that all product areas have been influenced by the greater emphasis now being put on health by consumers. The relationship between "food scares" and the buying of organic foods for health reasons is frequently referred to in the literature. It is often suggested both that we live at a time when our health is threatened increasingly by *global* dangers (Beck 1992) and that we are increasingly exhorted to take *individual* responsibility for health by engaging in various self-care regimes (Shilling 1993).

The notion that post-industrial society is a "risk society" (Giddens 1991; Beck 1992) implies that perceptions of risk have become more central in how we organise our lives: *"Living in the "risk society" means living with a calculative attitude to the open possibilities of action, positive or negative, with which, as individuals and globally, we are confronted in a continuous way in our contemporary social existence"* (Giddens 1991: 28).

This analytical framework provides an important background to some aspects of organic food consumption. Organic food is empirically related to several types of "food scare" and post-industrial types of risk – risks, that is, limited in neither time nor space, since future generations and the whole planet may be affected (Beck 1992). 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 "agroecosystem health" (Haworth *et al.* 1998), which in turn provides for

human health. In countries (such as the UK) in which scandals (such as the BSE debacle) have occurred and the public's interest in food-related risks has been particularly great, these associations seem to be more pronounced than they are elsewhere – in the Scandinavian countries, for example.

According to Giddens (1991) our sense of self-identity is formed reflexively through the continual reordering of self-narratives. The concept of "lifestyle" is used by Giddens to illuminate the way in which individuals seek to establish a meaningful and reliable sense of self-identity in 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. The more tradition loses the capacity to provide people with a secure and stable sense of self, the more individuals have to negotiate lifestyle choices and attach importance to these choices (Giddens 1991).

Consumers' valuations of organic food might refer to some of these issues (e.g. symbolic value, value in terms of self-representation and so on). In dealing with a complex plurality of choices, the consumer might take organic food to represent values that agree with "who you want to be". Organic food may, in other words, represent a lifestyle choice (see, for example, Halkier 1998). If we regard health as a state of total well-being – emotional, psychological and social – such issues become highly relevant as "health concerns". We cannot, within the frames of routinised everyday life, manage to be confronted with this plurality in the form of acts of choice. 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 (Kjærnes 1999).

This broad spectrum of interpretations of the concept of health – ranging from "avoiding illness" to "achieving complete well-being" – complicates the interpretation of consumer perceptions of connections between organic food and health. Care must be taken to include all the aspects perceived as relevant by consumers and to understand the specific meaning attributed in any given context.

Ethical concerns

Ethical considerations relate to a wide range of issues and are often reported to be 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 you serve food can all be seen as ethical concerns. It has been held that life in a post-modern society makes greater demands on the individual insofar as we are now required to navigate through a complex web of everyday choices with less moral guidance than we once had (Giddens 1991). The distinctive characteristics of ethics in post-modern societies are discussed by Baumann (1993). He claims, among other things, that ambivalence is a key trait of morality in the post-modern perspective: that morality is not universalisable, and that an authentically moral self is indeed marked by uncertainty as to whether all that should have been done has been done. From this perspective, it seems that moral issues will be, not less, but more urgent for contemporary citizens and consumers. And certainly, modern food production may give rise to a variety of moral questions.

Ethics may also be linked to religious faith, which, through directives of what should be eaten and what should not, may constitute a reason for eating organic food. We know that this is important for some "alternative" diets, like vegetarianism, but beliefs in for example nature as God's creation which should not be "hampered with" may lead to preferences for organic food.

Animal welfare was not an important issue – or rather not an issue at all - in the Italian studies reviewed. Because the Italian review was based on relatively few studies, it is difficult to know it this is a genuine trend or merely a particularity of the relevant studies. If consumer perceptions in Italy are, as they seem in this regard, this represents a significant difference from the UK and Denmark, where animal welfare is an issue of considerable importance.

Food quality

Food quality is another concept of crucial importance in understanding consumer attitudes to organic food. This concept also needs to be opened up, and its specific contents must be investigated thoroughly in any given context. A number of definitions have been suggested and applied, some of them technical, others less so.

Evaluations of the quality of a food product often focus on different levels of property. For example, a distinction might be made between a) directly visible properties (e.g. shape, colour, size), b) easily recognizable properties (fragrance, taste, consistency), and c) properties which are less easily detected in the purchasing situation (keeping quality, nutritional value) (Meltzer *et al.* 1992). Some quality definitions treat the quality of a food product as equal to the sum quality of its parts, while others reject such an equivalence (see, for example, Klett 1986), claiming that the emergent properties of the whole go beyond the sum of the parts. A holistic approach to the measurement of food quality, suggested by Meier-Ploeger and Vogtmann (1991), includes social, psychological, environmental and political dimensions. This means that quality may encompass all of the aspects and concerns mentioned already – and more.

It is evident that expectations of product quality are as high for organic foods as they are for conventional foods. Indeed in some cases the expectations are higher for organic foods, and there may be additional quality features where organic food is concerned. Thus several concepts referring to "inner" food qualities that are assumed to have importance for human health are used in connection with organic food (see, for example, Jensen *et al.* 2001, Meier-Ploeger and Vogtmann 1991; Woodward, Stolton and Dudley 1990). Methods of measuring the vitality of the food (picture-developing methods) (Schwenk 1991, Balzer-Graf and Balzer 1991) and its structural energy (Popp 1991) have been developed and used in research on organic food quality. Concepts such as "vitality" are certainly important for some organic consumers. Such concepts may also seem to be in keeping with the more tacit understanding of food quality expressed in lay terms by some consumers.

Most of the studies reviewed refer mainly to the "eating quality" of organic food. The perceived better taste of organic food is raised in several studies, both in Italy, Denmark and the UK (and in studies from other countries). Both Italian and British studies indicate that quality aspects relating to appearance (size, uniformity etc.) are not considered very important by consumers buying organic food. Nor are deviations from "trade standards" important. Some studies indicate a perception among consumers that organic food keeps less well.

Comparative studies disclose variation in the aspects of food quality that consumers care about (see, for example, Becker 2000). In keeping with this, the review indicates that consumer attitudes to the quality of organic food vary between countries and in different contexts. We need a more thorough understanding of this. In particular, consumer conceptions of food quality and the perceived relationship between food quality and health need further investigation.

Two-sided organic consumption and distribution

It is possible to observe two distinct trends in organic distribution and consumption: on the one hand, there is a "normalisation" in which organic food is incorporated into mainstream, standardised, high-volume distribution. On the other hand, there is what is typically called the "purist" line or "niche" approach (see, for example, Morgan and Murdoch 2000). Here, qualities perceived as organic are sought throughout the food chain, and decentralised, small-scale distribution and handcraft style food processing are also sought.[38] These two tendencies are subject to dispute in several countries (among them Denmark, Norway, Italy and the UK), 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 consumer preferences. Comparative studies of countries exist. It has been found, for example, that in Germany organic distribution is significantly decentralised through "Naturkostladen" (i.e. specialty health food stores), but that in the UK mainstream, multiple retailers account for a large majority of the organic sales. Differences in how these approaches serve the consumers are discussed by Latacz-Lohman and Foster (1997), who advise that both countries have something to learn from the other.

Denmark and UK top the list of EU countries with a high share of organic foods sold through conventional channels at, respectively, 86% and 79% of the organic food sold in total (Hamm, Gronefeld and Halpin 2002). In accordance with supermarket sales, a large part of the food processing is also typically industrialised in such countries. For example, in Denmark, most of the organic milk and milk products are produced by one large company (Arla Foods). In Italy, much organic retailing is connected with small-scale distribution, but there is a dual trend towards both "normalisation" and better quality products with higher prices. In Hungary, as well as in other Central-Eastern European countries, as already remarked, the availability of organic food in mainstream distribution is almost zero. It is only possible to buy organic foods at farm outlets or in smaller specialty stores (often health food stores).

According to Hamm, Gronefeld and Halpin (2002), who have reviewed the European market[39] for organic food, sales channels for organic food vary significantly between countries. Over 70% of organic food was sold through general food shops in Austria, Denmark, Finland, Sweden, Switzerland and the UK. Sales through specialty shops for organic food or health food accounted for 37-44% in Belgium, Germany, Italy, Greece and the Netherlands, while the category "bakers/butchers" accounted for 53% of organic sales in Luxembourg. Direct sales channels are regarded as a relatively significant channel across the board, even though they are not the dominant sales channel in any EU of EFTA country. Only in Sweden, Denmark and the UK were less than 10% of organic products sold through direct sales. However, in the accession countries, the Czech Republic and Slovenia, direct sales accounted for 70-100% respectively. Also in some EU countries direct sales and sales via weekly markets are quite high: for example, Ireland (41%), Luxembourg (24%), France (23%) and Belgium (20%). (Hamm *et al.* 2002).

While providing different background structures for production and distribution, such differences in food processing and distribution are also of crucial importance for the availability and the framing of consumer choices regarding organic food. These factors have a bearing on the communication of quality and security issues within the food system, and they must therefore be considered when one is evaluating how consumers relate to organic food.

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[38] See, for example, Morgan and Murdoc (2000), where the following statement is quoted: "*The pragmatic approach to organic growing is pushing our ethics into obscurity and irrelevance…The better quality of life that many search for is a reaction to consumerism, excessive economic growth, over-affluence, centralisation etc. Supermarkets belong to this latter world and selling through them is implicit acceptance of a system we should be fighting*". Urwin, D. 1986 Responsibility more than chemical free. New Farmer and Grower 12, 10-11.

[39] The review includes all 15 EU member states, two EFTA countries (Switzerland and Norway) and two accession countries (the Czech Republic and Slovenia).

Is has been claimed that the development of the organic food market implies a degree of industrialisation or normalisation of this market as for the market for conventional products. Vertical and horizontal integration in the market, and the merging of producers and processors with resulting tendencies of monopolisation, limits consumers' real choices between alternatives. While the availability of standardised products might improve, it might be more difficult to find product variation to satisfy diverse preferences (regarding food quality, variation in taste, ethical standards, types of contextual information and the ways in which these issues are communicated and so on). To the degree that this claim (that "normalisation" is necessary if the organic market is to grow) is correct, it is therefore important that "normalisation" does not occur at the expense of the consumers and their values, perceptions and preferences. It is important to have sufficient knowledge of the ways in which consumers perceive organic food and what their expectations are, for example, regarding organic food quality. 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 standardised food system. On the other hand, high availability and low prices are examples of consumer demands, which might more easily be fulfilled through a "mainstreaming" approach. Since consumer preferences are not homogenous but rather vary considerably – within countries, within groups, but also "intra-personally" according to different contexts – it will be important to keep the possibilities open for meeting a variety of (possibly contradictory) demands.

The characteristics of organic food processing and distribution do not only affect the framing of consumer choice and consumers experience with organic food. They help to determine who consumers perceive as "relevant others" in the food system so far as communication, trustworthy information and so on are concerned. For example, butchers are considered important guides among Italian consumers, while food authorities enjoy a high degree of trust in the Nordic countries.

Labelling

There is evidence in the literature that clear and simple labelling of organic food is important to consumers. At the same time, many consumers want more in-depth information about the food than a label normally allows. This seems to be a paradox. However, both wishes can be met through diversified information strategies. There are differences in the studied countries regarding labelling practice: some have a single, common label (Denmark), while others have several certifying bodies, each with different labels (Italy, UK, Hungary). There are also differences in the range of other kinds of quality label used in the different countries, and this may affect the way in which consumers perceive organic labels. On the one hand, it may be that consumers living in societies where many food labels are used acquire a kind of expertise and experience with labels. This may be positive so far as the comprehension of organic labels is concerned. On the other hand, a plurality of labels may cause confusion.

According to some studies, many consumers feel they lack information and knowledge about food and the food system in general. This is likely to have a bearing on the way in which organic food is perceived and consumer reaction to information about various issues, as well as different kinds of information approaches. A higher level of basic knowledge about the food system is likely to enhance receptivity to the kind of information that guides choices between organic and conventional food.

Effective communication of food issues is an important challenge for the future. Although more information is potentially available to consumers about organic food than about food in general, the challenge remains important at all levels of the organic food chain.

Trust in labels/sources of information

The relationship between perceptions of the food system and perceptions of a food product emerges, in the review, as an important issue. Consumers request for 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. Theorists such as Giddens (1991) and Beck (1992) claim that the consumers of today's post-modern societies are increasingly concerned about the origin of food and the way it is produced, and that new social movements are established around these issues. These movements challenge not only the established systems of production and distribution, but also the entire political structure (Giddens 1991; Beck 1992; Melucci 1991). It would be interesting to look at empirical research on increased consumer interest in the food system. The role of the "political consumer", and of possible perceptions of food quality relating to this, also deserve more attention.

There are considerable differences across Europe in how the food system is organised, and there are also cultural differences in 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.

There are reasons to believe that the degree of trust in governmental institutions and the food industry – as two important types of food systems actors – varies between different European countries. A comparative study found large differences in consumer trust/distrust in the food market compared with trust in public food control in Norway, England and Belgium (Berg 2000). Norwegian consumers placed their trust in the Food Control Authority to a much larger degree than consumers in England and Belgium. Norwegian consumers were found to have a higher level of trust than consumers in England and Belgium. These results were assumed to be related to the (then) recent dioxin scandal in Belgium and the "mad cow disease" outbreak in England. In a comparison of another set of data, the level of trust – measured both as "direct trust in food" and "trust in institution" – was also found to be higher among Norwegian consumers than consumers in most other European countries (Berg 2000).

Lack of trust in sources of information, especially the Government and the food industry, has been identified as a key barrier to purchasing animal-friendly products (Harper and Henson 2001 in Harper and Makatouni 2002). This appeared as an issue in focus group discussions in the UK (Reading), and among buyers of organic food (Harper and Makatouni 2002). Results like these illustrate that the identification of consumer trust in various sources of information plays an important role in efforts to understand consumer attitudes to organic food.

There are some indications in the literature that consumers in the four case countries under examination here relate differently to different food system actors (e.g. state food authorities and market actors). In the UK, the retail sector has played a dominant role as a "driver" of the developing organic market, including provision of consumer information. On the whole the government has had a less active role there than in some other countries (like Sweden and Denmark). In Denmark, the supermarkets have also had an active role, while governmental involvement has probably been more visible to consumers. In Italy, is seems that consumers have established systems of quality assurance based chiefly on personal relations with small-scale market actors. (This trend is illustrated by the already mentioned importance attributed to butchers). In Hungary, it is also likely that information about organic food is obtained mostly via personal relationships or in small-scale market contexts (e.g. farms or health food shops).

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, and there are indications that there is variation in this field. Differences in the basic framing of consumer practices in different countries may have an important impact on the way in which organic food is perceived by consumers. Once we accept that "consumer choices" reflect much more than consumer preferences (as discussed in Chapter 2), the inclusion of these background factors becomes important.

Information about organic certification

Good availability of information about what organic certification implies is important to consumers, and there is evidence of some confusion on this point.

From the Danish literature, there are examples of confusion about imported organic foods correctly equipped with the Danish "Ø"-label. Such foods are wrongly believed to be of Danish origin. The various exemptions from the organic rules – for example, regarding use of some types of pesticide, or of a small percentage of fertilizer from non-organic sources – are examples of other issues, which evidently come as a surprise to many consumers, if indeed they become aware of them.

Concern about genetic modification is often related to a preference for organic food, and buying organic is reported to be a strategy for avoiding GMOs. Even if this is a fully valid precautionary strategy, as the use of GMOs is forbidden within organic production, lack of reliable methods for analyzing whether GMOs are used or not represents insecurity about actual practice. These kinds of challenge relating to risk assessment are naturally not confined to the evaluation of organic food, but the organic food chain is not spared of it either.

It is, therefore, important that the rules and regulations should be made available to consumers. But it is also important that consumers have the opportunity to relate "bits of information" from regulations and codes of practice to a broader understanding of the contexts they relate to. Thus the issue of availability of information must be seen in connection with broader food system knowledge among consumers.

Food system knowledge

There is evidence that many consumers feel they do not have as much knowledge about food and food system issues as they would like (for example, in literature from the UK), and that better availability of such information would be welcomed. But how is availability to be improved? As mentioned in the discussion about labels, it can look somewhat paradoxical that consumers want both more knowledge, and more complex information, yet also more simple labelling.

One might argue that organic food – certified and labelled – already in itself provides more food system information to the consumers than is normally the case with conventional food. But the organic food system is generally subject to stricter regulation than the conventional food market (Morgan and Murdoch 2000), and buying organic food might in this respect be seen as a complexity-reducing strategy (Luhmann 1999). Nevertheless the issue of information within organic food systems needs to be further addressed. The exploration of an "organic HACCP" approach is desirable in this context.

One answer could be simple labels with clear and explicit references to the certification rules and to more detailed information about the background, enforcement etc. Buying organic

food may be a simple way to deal with challenges and uncertainties associated with the contemporary food supply. At the same time, those choosing this as an alternative to conventional foods, include many critical, knowledgeable consumers whose information demands may be particularly high.

9 Future Studies: Recommendations

This review of the existing research has been guided by two objectives: (1) that of elucidating concerns among European consumers relevant for assessing the quality and safety of organic foods, and (2) that of identifying similarities and differences between different European countries in this regard.

The main results of this endeavour have been summarised in Chapter 8. As we have seen, the existing research has only allowed us to elucidate consumer concerns to a limited extent. This review has revealed large gaps in the available research, both with regard to the extent to which different methodological approaches have been used and with regard to relevant issues that have not yet been investigated. We have seen that while some points of similarity and difference between European consumers can be expressed in terms of geographical boundaries/nationality, other points of similarity and difference appear to cut across such boundaries and to be linked to other factors such as the relative maturity of the markets at issue. These results and consideration of their implications raise many questions that can and should be addressed in future studies. Our focus here will be upon some of the substantive and methodological issues that, if taken up, would further the attainment of our original objectives as well as those of the *Organic HACCP* project as a whole.

Among key topics calling for further research are: the need for further quantitative studies that will yield descriptions of variations and identification of trends, with special regard to developing national markets in Europe; the need to go beyond a narrow focus on quantitative measures of buyer motives in the research approaches adopted; and the need for qualitative studies that will elucidate the character of key concepts as understood from consumer viewpoints and the impact of different social contexts upon patterns of consumption; quantitative and qualitative studies of relationships between consumers and systems of provision.

On the basis of this review of the existing research, we have sought to identify some of the more general and specific questions that should be posed in future research in this area. These are addressed in the first section of this chapter. The issue of links between the consumption of organic products and systems of provision are taken up for special consideration in the second section, while methodological considerations are presented in the last section of this final chapter of our report.

9.1 Relevant issues and research questions

Before turning to the consideration of more specific issues, three recommendations of a more general character will be made. These pertain to the need to incorporate a much wider range of substantive issues in future research, to explain correlations identified by a range of sur-

veys regarding consumers of organic food, and to expand the geographical regions in which consumer surveys are undertaken.

9.1.1 General recommendations regarding substantive issues in current research and explanations of correlations identified

(1.) There is a need to incorporate a much wider range of substantive issues in consumer research with regard to organic foods and in reviews of the literature in this field

The purpose of quantitative market research is that of forecasting purchasing patterns in the short term. The primary meaning of 'consumption' in this context refers to purchases. A quite different and much broader meaning of 'consumption' is found in social research, which is not related to an interest in forecasting market trends as such. This broader meaning of the term 'consumption' includes the activity of shopping, but it refers primarily to the meaningful contexts in which goods are used (or not used) by individuals or households. This distinction has been succinctly expressed by Halkier (2000:30) in the following way: "*Consumption covers not only activities of buying but also social relations connected to provision, use and disposition of goods and services.*" From this perspective, it must be recognised that a very wide range of consumer practices and concerns in everyday life underlie considerations about what to buy, where and when and with reference to for whom and on which occasions purchases are being made. It is essential to incorporate these perspectives in seeking to measure consumer opinions and motivations as well as behaviour in the market. If, therefore, consumer concerns in regard to organic foods are to be more fully understood and explained, there is a need to incorporate a much wider range of social scientific literature in reviews of relevant research and a broader range of issues in future research. It has not been possible to include much of the social scientific literature relevant to these issues in this report, but their relevance can be indicated here.

Households versus industry:
Among the important resources of private households in regard to the tasks of providing meals for household members on a daily basis are the uses of time, money and skill. Underlying these tasks is a division of labour between the unpaid productive activity undertaken in the household and the productive activities undertaken by the food and food service industries. An increasing level of industrial food processing provides households with the opportunity to save time and also places relatively fewer demands on culinary skill. But it incurs additional costs on household expenses, as well as representing added value to industry. The purchase of fresh unprocessed food products on the other hand places measurably less strain on household income than that incurred by processed products or by dining out, but it places relatively greater strain on the scarce resource of time and the use of skills. Social research regarding the provision of household meals clearly documents that income is not the only factor that plays a role in consumer preferences for given levels of processing. Homemade and home-cooked meals are highly prized, disregarding income level, and also have a wide range of symbolic meanings shared by those who consume them together (Charles and Kerr 1988; DeVault 1991; Murcott 1982, 1983, 1993; Warde 1997). It is important to remember that food both "nourishes and signifies" (Fischler 1988:276), it is both "fuel for the body and nourishment for dreams" (Lien 1995). For this reason, the relative degree of processing is a central issue in consumer considerations with regard to food choice, and it appears to play a central role in consumer trust with regard to other actors in the food system. Much more research needs to be undertaken therefore with regard to factors involved in consumer assessments of food processing and processed products, as related to the production of meals. Since a difference in levels of processing still remains an important point of difference between organic and conventional food products, this must be regarded as an issue calling for urgent attention in future research.

Products versus production systems

Much of the existing research regarding consumers of organic food is based on a sound premise of marketing to the effect that consumers seek and assess product advantages when comparing and choosing which product to buy. It does not belong to this approach to investigate the extent to which consumers are interested in or concerned about production systems, the people that operate them or the motives behind their activities. For this reason, these issues are relatively unexplored with regard to the demand for organic foods. Social research in other areas, however, documents that consumer assessments of products are closely related to their assessments of the latter issues. For example, qualitative social research regarding the assessment of biotechnology ascertains that consumers are not particularly concerned about eating products that are produced with the help of GMOs. Nevertheless, they are strongly convinced that this technology is being applied to food production with a view to profit rather than because of any benefits to mankind or to natural resources. For this reason, they are opposed to the use of this technology in food production and processing, maintaining a strong preference for GMO-free food products (Lassen, Madsen and Sandøe 2001). This kind of concern might be described as a concern with the quality of life, with types of production and consumption that are viewed as contributing to or hindering the prospect of a better world, or as a concern to defend the values of civil life against the profit motives of big industry. Some commentators have gone so far as to suggest that the purchase of organic food should be interpreted as an act of civil resistance (Hinrichs 2000). A more prudent interpretation would be that buying organic food may represent not only a wish for alternative products, but also for alternative systems of production and distribution. While this interpretation is no more than hypothetical at present, it would seem likely that benefits of this kind are perceived by some consumers in their assessments of organic production methods, producers and products, as compared with their conventional counterparts. More attention should be given to these issues in future research. This is of particular importance when considering the introduction of new principles to the production or distribution of organic food products.

Urban versus rural

One of the tendencies consistently documented by research is a significant correlation between urbanisation and the demand for organic foods. The point has been made earlier that this tendency may reflect a relatively greater availability of products in urban areas, given that 'demand' is measured as 'purchase'. However, it may also reflect a demand based upon something quite different. Urban dwellers daily pass people in the street who are and remain strangers, they use transport systems that are maintained by people who remain personally unknown to them, and they do most of their daily shopping in self-service outlets in which they and fellow shoppers remain anonymous. This way of life is dependent upon achieving some degree of what has been called 'system' trust, as compared to the 'personal' trust that is embedded in interaction between persons who are personally known to each other. Importantly, urbanisation increases the physical distance between producers and consumers, thereby reducing the possibility that relationships between both parties are based on 'personal' trust. We need to recall that the demand for food is a constant condition of life and, as social research has ascertained, the satisfaction of this demand has always been accompanied by some degree of anxiety (Fischler 1988). Unlike most other kinds of consumer goods, we cannot freely chose to do without food – even when we are dissatisfied with the available products. We recommend therefore that the perspectives of social research regarding urban and rural ways of life, that regarding trust and that regarding citizens' conceptions of risk in everyday life, are areas of social research that should be incorporated into future consumer research regarding concerns with food and preference for organic food. The issue of distance, whether it is measured as social distance between actors in the food system or as 'food miles' between centres of production and consumption centres is a central aspect of the conception of 'system trust'. The perspectives noted here are therefore equally relevant for studies focusing in the international distribution of organic foods and, more generally, for what is now referred to as globalisation of the food system (*cf.* point below).

(2.) Research is needed in which the characteristics of consumers of organic foods are treated as dependent variables that call for explanation

In the available research, not only urbanisation, but also age, gender, income and educational level are all treated as independent 'background' variables. This is done for the purpose of identifying market segments in which the demand at issue is relatively high or low. If consumer demand for organic food is to be understood more fully, however, we need research that will explain these correlations. For example, as noted in Chapter 8, higher levels of education are consistently correlated with a relatively higher level of demand for organic food. Given that the educational level of national populations throughout the European region is tending to rise, this can be taken as a significant indicator of increasing future demand. This makes it all the more important to seek to explain why education is strongly correlated with demand and to what extent age, income and urbanisation might explain some of the variation attributed to this factor.

Perhaps the most obvious hypothesis is that more educated people tend to use a greater range of mass media and to have higher levels of information about a wider range of issues, including food products. However, this hypothesis is not supported with regard to organic foods by the research regarding consumers' level of information about labelling and organic standards (*cf*, Chapter 8). Social research in the field of education indicates a basis for a somewhat different hypothesis (Poulsen 1999). It is found that people who have relatively higher levels of education are more inclined to view the decisions they make in their everyday lives as ones that can and will make a difference in terms of affecting the lives of other people. According to this view, people who have a minimal level of education would be more inclined to view their dissatisfaction with food products, poor health or environmental problems as facts of life that are not changed by means of their own decisions or actions (but only by means of some extraordinary intervention), whereas this way of viewing the world would itself change with increasing levels of education. This hypothesis is compatible with the finding that people may have somewhat diffuse reasons for conceiving organic foods as being "better" than their conventional counterparts, but those with relatively higher levels of education are more willing to act in the light of that conception. We recommend that the latter hypothesis be explored in future research with specific reference to the demand for food produced by organic as compared to conventional methods.

(3.) More consumer research is needed with special regard to central, eastern and southern regions of Europe

This review of the literature reveals that much consumer research with regard to organic food is linked to marketing interests. This is a predictable outcome, given the role of marketing studies in consumer research as noted in Chapter 2. It entails that very much more research has been undertaken in the northern and western regions of Europe, where consumer demand is considerably higher than in other European regions (*cf*. Chapter 8). This observation is not a mere reflection of the language capabilities of the present research team, since language criteria were not included in the initial bibliographical search. There do appear to be considerable gaps in the available data, particularly with regard to countries in the central, eastern and southern regions of Europe. More descriptive research is therefore called for regarding the behaviour, conceptions, attitudes and concerns of consumers with respect to organic foods, not least in these regions.

9.1.2 Specific recommendations for research regarding conceptions of quality and safety and concerns regarding accountability among consumers and other actors in the organic food system

(4.) There is a need to elucidate consumer conceptions of the quality attributes of specific food products and product groups

The available research is based upon a familiar distinction in marketing theory with regard to product quality, according to which the 'functional' attributes of products are distinguished from their 'non-functional' attributes - also referred to as 'social' or 'symbolic' attributes. The former group comprises attributes that are ascertained by means of laboratory tests, and in regard to food products would include such aspects as ingredients, nutrient and toxin content, perishability and shelf life, etc. The latter group comprises attributes that are ascertained by means of market research, and have traditionally included measures of consumer preferences with regard to variants within a given product group, reactions to packaging and branding, etc. There is little basis in marketing theory for conceiving 'non-functional' attributes as arising from any rational considerations on the part of consumers. Buyer motives tend to be conceived therefore as being more or less rationally grounded in so far as they regard 'functional' attributes, and as more or less emotionally based in so far as they regard 'non-functional' attributes. For the most part, researchers have sought to incorporate the investigation of 'buyer motives' in regard to organic foods into the latter category. Attempts have been made to introduce expanded concepts of (non-functional) quality attributes that include such relatively new aspects of consumer preference as concern with environmental friendliness and animal welfare. This development has had some consequences that should be addressed in future studies.

One consequence is that almost no research that departs from the conceptual framework of marketing theory has been devoted to consumer conceptions of the quality attributes of organic foods. Furthermore, conceptions of the so-called 'functional' attributes of these foods have received relatively little attention, other than posing the question as to whether 'health' considerations constitute a motive for purchases made. As we have seen the concept of health at issue remains undifferentiated in these studies. Moreover, social research more generally indicates that health and nourishment always play a role in food concerns in everyday life. Exploratory studies are needed that can yield insight into the quality attributes of food that consumers deem important in practice. Disregarding the manner in which such attributes have been categorised in earlier research, we need to reach a more accurate understanding of precisely which aspects of any given product group are considered to be special to that product group as such, and which aspects are seen as differentiating organic variants from others.

Qualitative social research indicates that quite different attributes are at issue with respect to different product groups, for example vegetable as compared to animal products, or fresh produce as compared to processed products (Holm and Kildevang 1996). It is also found that quality demands differ, depending on the social contexts in which products are used, and that conceptions of 'health' and 'environment', as well as 'quality', often overlap. We recommend therefore that future studies should seek to elucidate consumer conceptions of the quality attributes of specific food products and product groups, focussing on points of comparison between organic and conventional variants as well as points of similarity and difference between the contexts in which products are used.

(5.) There is a need to compare conceptions of quality attributes among consumers with those of other stakeholders

Little is known at present about the extent to which stakeholders in organic chains of production, distribution and consumption have similar or different conceptions of product quality. It would seem highly likely that producers, distributors and consumers differ in their conceptions and in their demands in this regard. The issue is virtually unexplored. A recent qualitative study undertaken among organic farmers in Denmark ascertained that one reason why some primary producers prefer to market their own products directly to consumers was due to an unwillingness to comply with the quality demands of distributors, which would limit their selection of product varieties and impose demands regarding harvesting or slaughtering (Odgaard and O'Doherty Jensen 2003). Some Norwegian studies have also focussed on similarities and differences between primary producers and consumers of organic food with regard to motivations, conceptions of food quality (Torjusen *et al.* 2001), as well as similarities and differences between retailers and consumers in their views of organic food (Wandel, Torjusen and Vittersø 2003). Also, an earlier analysis of quality perception in regard to vegetables among farmers, retailers and consumers included some actors involved with organic food (Lien and Døving 1996). Results from these studies indicate points of similarity between primary producers and consumers on the one hand, while different conceptions appear to be shared on the other hand by actors in the food industry, wholesale distributors and actors in the mainstream retail sector. In so far as the project of *Organic HACCP* is to promote the establishment of a system of quality assurance, further exploration of these issues must be accorded high priority.

(6.) There is a need to compare conceptions of food safety among consumers with those of other stakeholders

The need for comparative studies of conceptions of food safety among stakeholders in organic chains of production, distribution and consumption is parallel to that identified above in regard to conceptions of quality (*cf.* point 5). To the extent that conceptions diverge, this would have serious consequences for the commercial success of an assurance system such as that of *Organic HACCP*. The need to resolve such differences may however serve to promote the kind of dialogue between stakeholders that could further mutual understanding, this being a precondition of the successful implementation of such a system.

(7.) There is a need to elucidate 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 systems

We have seen in the course of discussing point (4) above that some definitions of food safety regard 'safety' as an attribute of products. This definition conflates the concepts of 'quality' and 'safety', viewing safety as one attribute of product quality. It might be argued that in a system of 'quality assurance' such as *HACCP*, which was originally designed with a view to identifying and controlling hazards, 'safety' has tends to be regarded as the most important quality attribute of products. In the light of social research regarding consumer conceptions of risk in everyday life it would seem highly unlikely that this is a conception shared by consumers. The available research indicates that consumers are largely unconcerned about probability estimates made by experts regarding the likelihood of exposure to any given hazard. They are extremely concerned on the other hand with the character of the personal and social consequences of any given hazard, which is brought to the attention of the public, and with issues of accountability. (How many people might be affected? How serious is it? What can be done? How has it happened? Who is to blame?). It would seem that consumers tend to think of food safety as being related to serious personal, social and moral issues rather than as concerned with measurable levels of toxins or pathogens in food products.

This issue needs to be explored more fully and more specifically with reference to possible differences between product types, processing and production systems, as conceived by consumers. The point has been made by Holm (1999) that there is reason to believe that consumer concerns about food safety and modern industrial food production might be expressed in a variety of ways. In some cases it may take the form of explicit critique, while for the majority it will tend to be present as a latent form of mistrust and felt insecurity (Holm 1999). Further exploration of the latter tendencies would call for qualitative methods of data collection (*cf*. Hansen *et al.* 2003).

(8.) There is a need for research regarding 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

It would seem that social and cultural changes in recent decades have led to increased demands for accountability on the part of institutions and their representatives (O'Neill 2002). Demands to this effect may well be part and parcel of everyday life in democratic societies when citizens have reason to believe that power is being abused or that policies have unforeseen or unwanted consequences. When demands of this kind are expressed by consumers as preferences for one product type as compared with another, it does not seem fruitful to seek to categorise these demands as aspects of 'quality' – regarding them as a newer kind of non-functional attribute of products. Nor does it seem fruitful to regard them as demands peculiar to a particular market segment, which is then given its own label, its members being identified as 'political consumers'. We would recommend that the issue of accountability on the part of producers, processors, distributors and regulators be addressed as such by future research. The establishment of organic standards and certification are themselves procedures of accountability, in which representatives of consumer organisations can and should be involved. Future research might fruitfully explore satisfaction with existing systems of accountability among stakeholders in the organic food system as well as barriers to the development and implementation of new systems of accountability.

9.2 The organic food system as representing an alternative system of provision

There is a need to increase our knowledge about connections between organic food and systems of provisioning. It would be of interest to study distribution systems as such, as well as consumers' conceptions of and relationships to various types of distribution systems. Attention has been drawn in Chapters 4 – 8 to the need to distinguish direct and indirect channels of distribution in commodity chains within the organic food system.

Some issues of particular importance in this context are the relative complexity of commodity chains, the social and physical distance between actors/stakeholders within these chains, the distribution of power and influence; and the allocation of responsibility for safety and quality. These may all have influence on key consumer issues such as trust and a wish for accountability on the part of other key actors within organic and conventional food systems.

(9.) There is a need for research that can elucidate reasons why some producers and some consumers maintain a preference for organic products sold/ purchased through direct distribution channels

The available research clearly documents that levels of consumption rise dramatically in markets in which the major retail chains have entered the organic market. Relatively little is

currently known about why some producers and some consumers nevertheless resolutely wish to exclude wholesalers and retailers from the distribution chain, preferring to deal directly with each other. Historically speaking, direct local sales to households and restaurants constituted the initial form by which organic food products were distributed. Producers wishing to maintain direct forms of distribution may well be motivated by the ideals of the pioneer organic farmers, wishing to support such principles as those of proximity, traceability, diversity of produce and fair price. Direct sales also ensure relatively higher prices, which are to the advantage of primary producers and small firms involved in processing food products, but they also incur the costs of distribution. Moreover, different channels incur different costs and strains on the resources of both parties, dependent upon whether delivery systems/box schemes, farm sales or markets are at issue. The research results presented in Chapters 4 and 5 make clear that availability is not a primary motive behind the consumer preference for organic products obtained through direct sales channels. At least some such channels appear to be flourishing in markets, such as that of the UK or Denmark, in which major retailers are firmly established.

These trends indicate the need for further research that will elucidate the reasons why direct channels are maintained, as understood from the perspectives of both producers and consumers. It must be considered a matter of priority to document the character of the interests served by direct distribution. One of the fruits of such research would be clarification of the extent to which the interests of smallholders and small firms should be distinguished from those of major stakeholders in organic chains of production and distribution. Another benefit would be that of clarifying the extent to which consumers who purchase products through direct sales channels constitute a distinct sub-group among consumers of organic foods.

(10.) With regard to each set of stakeholders in chains of organic production and distribution, there is a need for research that can elucidate the dominant conceptions of other groups of stakeholders in that chain

Research is needed regarding stakeholders' conceptions of other actors, who also play essential roles in existing organic chains of production, distribution and consumption. This recommendation for further research with a view to furthering the objectives of the *Organic HACCP* project is prompted by three considerations. First, it must be presumed that divergent interests are involved in the management of food safety and food quality, and that different stakeholders in practice negotiate the right to define the goals to be achieved and the means appropriate to those objectives. Second, there is the pattern frequently observed at conferences on organic food, in which different stakeholders are represented. In its most blatant form, this pattern takes the form of identifying "goodies" and "badies" among stakeholders, while in its less blatant forms it takes the form of airing prejudices that may remain implicit. The former is exemplified by the tendency to identify large firms and major actors as having sold out on the values and ideals of organic production. The latter is exemplified by the tendency to conceive consumers as irrational or ignorant actors, who do not share the values and ideals of pioneer producers. Third, these patterns are likely to be familiar to any reader of this report, but they remain unexplored by social research. Unless they are documented, any initiatives to implement an assured management of food quality and safety may proceed on the naïve assumption that such a system will further the interests of all stakeholders or that it can proceed without conflict, negotiation and dialogue.

9.3 Methodological implications

Ideally, a research programme of this kind would be undertaken by means of quantitative and qualitative methodologies, the planning and results of which would reciprocally inform and

supplement each other. Moreover, given the fact that meanings of food practices tend to be implicit rather than explicit, methods of data collection would not be based exclusively upon questions addressed to respondents. They would include observation or registration of actual behaviour as well as reported behavioural data.

(11.) Future consumer research should employ a variety of methods of data collection and analysis, ideally planned such that quantitative and qualitative methods supplement each other

The strength of survey methodology undertaken among randomly selected respondents lies in the possibility of identifying trends that hold more widely among the members of a given population by generalising from the information obtained from a single representative sample or from successive samples in a time series. Studies of this kind can yield insight into variations between social groups and correlations between selected between variables, as well as developmental trends. The value of such studies depends upon the size and composition of selected samples as well as the quality of questionnaires employed – demands, which were not always satisfactorily met in the studies reviewed here. A weak point of all survey methodology regards questionable validity. Measurements are usually undertaken by means a highly structured questionnaire. Not only are all questions that are deemed relevant formulated beforehand, all answers deemed likely to arise are also formulated in advance. No self-correcting process is built into this methodology regarding either the relevance of the questions posed or the adequacy of the range of foreseen answers. Its value is therefore heavily dependent upon the preconceptions of the team responsible for questionnaire design and their prior familiarity with the views and way of life of the population under investigation.

Insight of the latter kind is best obtained by means of qualitative methods of investigation, such as depth interviews, focus groups and participant observation. Moreover, the design of qualitative studies is usually such that preconceptions among the research team are challenged, considered, and a more adequate understanding of informants and their life-world thereby achieved.

As we have seen, surveys undertaken among consumers of organic food have frequently been designed with a view to identifying the distribution of ‘buyer motives’ and of levels of ‘willingness to pay’ premium prices. Much attention has been given to measures of health concern contra environmental concern and somewhat less to that of animal welfare and a range of other possible motives for buying organic food products. Qualitative research on the other hand has fairly consistently undermined the view that actual ‘buyer motives’ can be neatly distinguished in the manner that is often presupposed in questionnaire design. For example, it is clear that consumer concern with pesticides, drug residues or a concern to maintain sources of clean and unpolluted ground water, frequently involve both health and environmental considerations. They are also found to involve moral considerations regarding the proper care of natural resources and the obligations that people have towards each other. It is for this reason that we strongly recommend the employment of both qualitative and quantitative methods of data collection and analysis in future consumer research in this field.

Doubtless, the meagre and somewhat confusing results of consumer research in this area to data is a source of frustration to researchers and other stakeholders, who would appreciate a review of the existing research that yielded clear and concise answers. This is not possible, however, at the present stage of development. The recommendations put forward in this chapter can be summarily presented as follows:

General recommendations regard the following needs:

- To incorporate a much *wider range of substantive issues* in consumer research with regard to organic foods and in reviews of the literature in this field
- To treat *consumer characteristics* in this field *as dependent variables* calling for explanation
- To undertake *more research regarding* the consumption of organic foods in *central, eastern and southern regions* of Europe

Specific recommendations regard the need for future research to address the following issues:

- 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

With regard to research methodology it is recommended that:

- Future consumer research should employ a variety of methods of data collection and analysis, ideally planned such that *quantitative* and *qualitative* methods supplement each other

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IFKA (Institut for Konjunktur-Analyse, Denmark): http://www.ifka.dk
Food focus: http://www.foodfocus.dk
The Danish Consumer Council: www.fbr.dk
The Danish Ministry of Food, Agriculture and Fisheries**:** http://www.fvm.dk
Økologisk Landsforening (Denmark): http://www.okoland.dk/

Appendix

Some Comparative European studies

CONVERSION[40]

The Conversion multi-country case study is made up of five national case studies each comprising of up to 27 individual farm cases. The countries studied are UK, Italy (Tuscany), Denmark, Ireland and Portugal. No direct consumer data has been collected, but some perceptions about consumers and "the market" by farmers are available. Marketing issues were a problem for Italian, Portuguese and Irish farmers (Working Paper DL 3.1 p 25)

Consumer studies from the UK, Ireland, Italy, Portugal, Denmark and Austria has been reviewed in the study. According to this review, the typical consumer is described as coming from higher socio-economic group, and (most likely) female. However, age of consumers most likely to purchase organic food varies between countries. In the UK and Italy organic consumers are either under 30 years or between 50-70 years. Both these age groups represent households with few dependants and therefore more disposable income. However, in Ireland, organic consumers are more likely to be in the 35-54 years age range. These households are likely to be child oriented. Consumers in Italy also stated that organic food purchase for children, and those with health problems and allergies is important. More consumers in Denmark said they had purchased organic food at some time, than in other study countries, 80 per cent compared with 65 per cent in the UK, 54 per cent in Austria, 30 per cent in Ireland, and 8 per cent in Portugal (Mayfield *et al.* 2001).

Reasons for purchase were similar across Europe. Health concerns, typically fuelled by food scares such as over BSE and GMOs, are the number one reason cited for purchase of organic food. Nevertheless, environmental and animal welfare issues and taste are also considered important factors underlying demand.

Reasons for not buying organic food centre on concern over price (particularly in the UK), availability (particularly in Ireland and Portugal where there is far less involvement by multiples in retailing), and range of goods. Habits and lack of knowledge were cited as constraints on purchase in Denmark. The Italian mistrust of organic labelling systems and lack of willingness to accept the appearance and seasonality of organic food reduces potential purchase of organic foods in Italy (Mayfield *et al.* 2001).

Label recognition and consumer understanding of the term organic is also studied in this project. Results indicate that in the UK, Denmark, Italy and Austria there is good consumer understanding of the term organic and in the UK, Denmark and Austria, there is also good or-

[40] CONVERSION: Overcoming barriers to conversion to organic farming in the Eurpoean Union through markets for conversion products (QLRT-1999-31112). A research project financed under the Fifth Framework Programme of the European Commission.

ganic label recognition. In Italy, however, there is a great deal of confusion over labels and also scepticism over the authenticity of much organic food. This is seen to create less willingness to accept the poor cosmetic appearance and seasonality of organic foods. Label recognition in Italy, Ireland and Portugal is very poor. In Ireland, a greater number of respondents recognised the UK's Soil Association label than any of the Irish labels – no doubt indicative of Ireland's reliance on imports. In Portugal there is very little understanding of the term organic, both by producers and consumers, and one study showed that two thirds of consumers had never heard the term.

OMIaRD[41] – Organic Marketing Initiatives and Rural Development

One report available from this project gives an overview of retailers' sales arguments for organic food in different European countries[42] (Hamm, Gronefeld and Halpin 2002). However, reasons why consumers purchase organic food products will be examined in another part of the project, but is at present not published. Results on the sales arguments, based on expert opinions in the different countries, indicated the importance of five major reasons for purchasing organic food (nature conservation; food safety; animal welfare; taste; non GMO; and others) by ranking. Food safety was the dominant sales argument across most of the European nations surveyed. It was ranked highest in all countries, with the exception of Denmark, Finland, Ireland, the Czech Republic and Norway. However, only in Norway was it of relatively low importance. In Norway, nature conservation and animal welfare considerations were the most important sales arguments.

The ranking of the sales arguments following health was less clear, but nature conservation was regarded as the second most important sales argument, followed by taste. Animal welfare was the second least important argument, while non-GMO appeared to be the least important argument.

Among the issues in the "others" category were "high product quality and guaranteed freshness", and "Life style appeals". Both of these were ranked highly in Denmark. This is considered to be paradoxical; since some are of the opinion that organic product quality (for example in terms of product presentation and packaging) is lower than conventional (Michelsen *et al.* 1999). However, it is discussed as illustrating the importance of the turnover of organic food in the distribution channels studied, because it is much easier to guarantee freshness of products than it is with low market shares and turnovers.

Quality Policy and Consumer Behaviour[43]

Some available publications from the project "Quality Policy and Consumer Behaviour" have been reviewed in our study. These results have been more broadly focussing on quality perceptions, but have been of interest as a background for understanding consumers' perceptions of organic food. Henson and Northen (2000) describe their focus as being on how consumers who have chosen to consume a particular product (meat: beef, pork, chicken) assess the safety of that product at the point of purchase. Their method is largely inductive in that it is based on analysis of focus group data, but they also claim it embodies certain elements of the perceived quality risk framework. On the one hand, this study reflects consumers' concern

[41] Project (QLK5-2000-01124) under the European Union's Fifth Framework for Research and Technological Development.
[42] Austria, Belgium, Germany, Denmark, Spain, Finland, France, Greece, Ireland, Italy, Luxembourg, The Netherlands, Portugal, Sweden, United Kingdom, Czech Republic, Slovenia, Switzerland and Norway.
[43] FAIR-CT 95-0046.

about risks (associated with beef), and on the other hand it reflects perceptions of their ability to judge the safety of beef at the point of purchase.

The study concluded that there are differences in which quality indicators that were judged helpful at the point of purchase, and also on the relative perception of different risks. Therefore, it may not be possible to adopt a Europe-wide strategy, but rather nationally specific strategies. The study illustrates the complexity of the process by which consumers assess the safety of beef at the point of purchase and the ways in which the process differs across six EU Member States.

Some examples of differences between countries are: 1) Whilst branding and/or use of quality labels may be quite effective in Sweden and the UK, these are likely to be less successful in Ireland, Italy, Germany and Spain. 2) In the UK, information on the freshness of the meat and nature of animal feed may be more effective than, for example the name of the producer. In Ireland and Germany, however, the name of the producer is likely to be a relatively important element of the information provided to consumers. 3) More experienced consumers might be expected to make less use of brands and quality labels than less experienced consumers (Henson and Northen, 2000).

The study showed that, in certain contexts, brand and quality labels may play a secondary role in the safety assessment process. This finding is of relevance to the project, of which this review is a part, in that different forms of consumer information has different degrees of success in different countries. It will be important to identify factors, which have a bearing on how consumer orient themselves regarding the assessment of food as “safe”, of “good quality”, etc.

CONDOR[44]

The market for organically produced foods remains relatively small. If it is to increase then there need to be a systematic and scientific examination of the consumer decision-making processes involved in the choice between organic and non-organic foods.

This project brings together a mutidisciplinary team across eight EU member states to examine this topic. It combines the development of methods for the segmentation of consumers based upon values and the elicitation of affective (emotional) associations and moral concerns. It involves the development of a theoretically based consumer decision-making model and the testing of this model in eight EU member states and in identified consumer segments.

It will provide information on the role played by values and by affective associations and moral concerns in consumer decision-making on organic foods and provide novel insights into the marketing of organic foods in the future.

Objectives:
- To provide a basic understanding of the processes involved in consumer decision-making on the purchase and consumption of processed and fresh organic foods.
- To model consumer choice of organic foods based on attitudes, values, affective and moral concerns over eight EU member states.

Deliverables:

[44] Consumer decision-making on organic products (QLK1-2002-02446). A research project funded by the European Union. Project Coordinator: Prof Richard Shepherd, University of Surrey, UK. Starting date: January 2003, duration: 3 years.

- Novel methods for uncovering emotional and moral concerns which might influence the choice of organic foods.
- Methods for segmenting consumers based on their values.
- Databases of consumer attitudes, values, emotional and moral concerns in relation to organic foods.
- An understanding of cross-European differences in the impact of emotional and moral influences on the choice of organic foods.
- Dissemination to stakeholders, including industry, consumer groups and NGOs, via a website and through brochures and workshops targeted at particular stakeholder groups.
- A synthesis of the implications for the European marketing of organic foods.

Trust in food[45]

This multidisciplinary study is directed towards the identification and analysis of factors that determine trust in the food in the food supply. These factors include the roles of market actors, public authorities, consumers and comparative analyses including several types of data are carried out. Representative consumer surveys are conducted in six European countries, including small/big countries in the north/south. Institutional studies (documents, interviews) of policy and market strategies are conducted at country and EU levels. Two cases are focussed: beef – a sector in crisis and trans- formation, and tomatoes – a less challenged sector. Dialogue with European consumer groups and public authorities is Emphasised in the identification and application of trust enhancing strategies. These, together with retailers and other stakeholders, also represent important target groups in the dissemination program. The overall objective is to investigate the social and institutional conditions for the production and maintenance of consumer trust in food. The specific objectives are to: - develop a comprehensive theoretical basis for the empirical study of trust and distrust in food - describe dimensions and variations of trust among consumers in six European countries - identify institutional strategies and arrangements for the promotion of trust and to contrast country strategies and EU policy initiatives, - investigate the relationship between institutional strategies and variations in consumer trust, - enhance strategies for the handling of consumer trust and distrust, with particular focus on the role and involvement of consumers.

The first publication from this project, a comparative study of consumer trust, is now publicly available (Poppe and Kjærnes 2003).

TRUST[46]*-Food Risk Communication and Consumers' Trust in the Food Supply Chain*

This newly started project will investigate the antecedents of trust in information sources and risk management along the food chain and mechanism that determine the social diffusion of trust. It focuses on the evaluation strategies brought about by consumers to access reliability of the message, the way they process risk information with regards to different food hazards, and the cultural gaps between professional risk managers and laypeople. It examines the interplay of the various psychological, sociological, demographic, and economic factors at individual, market and social level. Specific objectives of this project are:
- Providing a better understanding of consumer demands, attitudes and perceptions, with special reference to trust and risk perception in the food chain
- Developing better strategies to communicate more effectively to consumer issues surrounding food risk.

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Other comparative studies in EU-member states

In a paper comparing and discussing marketing strategies for organic food in Germany and the UK, the authors conclude that although the primary reason for buying organic food seems to be related to health in both countries, altruistic motives are more evident in Germany than in the UK (Latacz-Lohmann and Foster 1997). Willingness to pay for organic food is seen to be higher in Germany, and this is seen as reflecting the longer standing tradition of organic food in Germany.

Kristensen and Thamsborg (2001) discuss the future European market for organic products from ruminants, and make some general reflections on consumers' motives for buying organic food. They conclude that several studies have shown that human health and food safety are among the most important motives for buying organic foods. Second, environmental protection and nature conservation are often mentioned, while animal welfare is important particularly in the Northern part of Europe (Wier and Calverly 2001; Michelsen *et al.* 1999; Jensen *et al.* 2000 in Kristensen and Thamsborg 2001).

Influences on food choice perceived to be important were investigated in a cross-national study including all EU-member states in 1995/1996 (Lennernäs *et al.* 1997). Cross-sectional nationally representative samples of approximately 1000 adults in each country completed a face-to-face interview-assisted questionnaire. The five most important factors found to influence the consumers' food choice were "quality of freshness" (74%), "price" (43%), "taste" (38%), "trying to eat healthy" (32%), and "family preferences" (29%). Respondents in different categories (age, gender, education and employment status) selected different factors as having major influence on their food choice. Demographic factors seemed to have greater effects on perceived influences than culture (country): "Quality/freshness", "price", "trying to eat healthy" and "family preferences" seemed to be most important in women, "taste" and "habit" in men. Women, older and more educated respondents were more likely than other respondents to select "trying to eat healthy" as having a major influence. "Price" seemed most important in unemployed and retired respondents (Lennernäs *et al.* 1997).

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For more information on the project and to download this report, see the project web-site: **www.organichaccp.org**

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