



Where does my food come from?

BEUC consumer survey on origin labelling on food

JANUARY 2013

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Context and objectives

Recent years have seen a growing interest on the part of European consumers to know the origin of the food they buy. In response, some industry operators have recognised the marketing opportunity this provides and communicate on the origin of their products. Indications such as “made in”, “product of”, etc. are multiplying on food labels as well as flags, symbols or pictures which can indirectly imply or suggest a particular food’s origin (sometimes in a confusing way). However, with the exception of a limited number of (mainly unprocessed) foods such as fruit and vegetables, beef, fish or eggs, for which specific pieces of EU legislation (marketing standards, Regulation (EU) 404/2011 on the implementation of the Fisheries Control Regulation, Regulation (EC) 1760/2000 on beef labelling, etc.) already provide for mandatory origin labelling, origin information remains absent from most foods sold on the EU market. Where it does appear on the label, it is not always clear to consumers to what extent (ingredient(s), farming/processing step(s)) the food does actually come from the area where it is said to originate from.

The new EU food labelling legislation¹ aims at improving the current situation. Beyond the above-listed foods, it provides for the immediate extension of mandatory origin labelling to meat of poultry, pig, sheep and goat and strengthens the rules on voluntary origin labelling by making it compulsory to inform consumers if the primary ingredient(s) have a different origin from that of the food product itself. Moreover, it foresees a series of reports by the European Commission in view of the possible extension of mandatory origin labelling to additional

categories of foods (e.g. meat used as an ingredient, milk and milk used in dairy, single-ingredient foods).

With a view to contributing data on consumer expectations to the aforementioned reports – which will take into account, among a number of aspects, the need for consumers to be informed –, BEUC, The European Consumer Organisation, commissioned an opinion survey on origin labelling in four EU countries (Austria, France, Poland and Sweden). The objective of the survey conducted in July 2012 was two-fold:

The survey aimed at investigating consumers’ general interest in origin labelling compared to a range of other factors (e.g. price, taste or brand) for different categories of foods, and, for those interested in this information, the reasons behind this interest and the expectations in terms of the geographical level of origin labelling.

It also aimed at evaluating consumers’ understanding of, and preferences for origin labelling on various food products (fresh meat, processed meat, and processed fruit/vegetables). As today’s food supply chains are increasingly complex, the very notion of the “origin” of a food can sometimes be difficult to grasp and, therefore, the survey aimed to shed light on what consumers would typically consider to be the “origin” of a food, in particular where the production process has involved several steps not all necessarily taking place in the same geographical area.

The findings of the survey are presented in this report.

¹ Regulation (EU) 1169/2011 on the provision of food information to consumers.



Methodology

An online omnibus survey was commissioned by BEUC in July 2012 in the following 4 EU countries:

- Austria
- France
- Poland
- Sweden

These countries were selected with a view to complementing recent or on-going similar undertakings by BEUC members² as well as findings from the Special Eurobarometer report No 389³ whilst reflecting European diversity (internet penetration, however, was a limiting factor to cover more Eastern European or Baltic countries).

In all 4 countries, the survey fieldwork took place from 12th to 16th July 2012 and involved a representative sample of the national population. Quotas (age, gender and region) were set to ensure samples were in line with each country's national population structure and attention was paid to have large enough samples to allow for cross breaks (incl. gender, age, socio-economic status, education level, household size, and presence of children).

Sample size and age coverage varied slightly between countries:

- Austria: 1037 (age coverage: 16-54)
- France: 1045 (age coverage: 16-64)
- Poland: 1057 (age coverage: 16-54)
- Sweden: 1029 (age coverage: 16-64)

Respondents were administered an online questionnaire comprising 9 questions (see Annex).

2 2009 and 2011 research from Which? in the UK; 2012 survey conducted simultaneously in Belgium by Test-Achats, Italy by Altroconsumo, Portugal by DECO Proteste and Spain by OCU; 2012 survey by the Danish Consumer Council in Denmark; 2012 survey by KEPKA in Greece; and 2012 survey by DTEST in the Czech Republic.

3 Special Eurobarometer report No 389: Europeans' attitude towards food security, food quality and the countryside, July 2012.



Key findings and recommendations

In a nutshell - BEUC's recommendations for future rules on origin labelling on food

ORIGIN LABELLING SHOULD BECOME MANDATORY FOR ALL MEATS, MEAT USED AS AN INGREDIENT, MILK, MILK USED AS AN INGREDIENT IN DAIRY PRODUCTS, UNPROCESSED FOODS, SINGLE-INGREDIENT PRODUCTS AND INGREDIENTS THAT REPRESENT MORE THAN 50 % OF A FOOD.

Consumers' demand for origin information on food is strong and deserves full consideration. Close to 70% (on average) of consumers in Austria, France, Poland and Sweden consider the origin as an important factor when buying food. A substantial majority of consumers want to know the origin of meat, fish, milk and dairy products, and fruit and vegetables and more than half of them also find it important that the origin of single-ingredient foodstuffs (e.g. sugar, salt, flour) and of coffee/tea is labelled.

ORIGIN LABELLING ON FOOD SHOULD BE (AT LEAST) AT THE COUNTRY LEVEL TO BRING MEANINGFUL INFORMATION TO CONSUMERS.

The vast majority of consumers in Austria, France, Poland and Sweden want to know the specific country – if not the specific region – their food comes from. Indications such as “EU”, “non-EU”, “EU and non-EU”, “EU and/or non-EU” would certainly not meet consumers' expectations.

RULES FOR ORIGIN LABELLING ON MEAT OF PIG, POULTRY, SHEEP AND GOAT SHOULD FOLLOW THOSE ALREADY IN PLACE FOR BEEF MEAT (I.E. “ORIGIN” COVERING THE PLACE(S) OF BIRTH, REARING AND SLAUGHTER).

Consumers are not always clear as to what origin labelling currently means on different food products, i.e. they have difficulties finding out what happened in the country a food is said to come from. Greater transparency as to what step(s) of the farming and/or manufacturing process have taken place in a given country as well as consistency in origin labelling rules within and across different food categories will help avoid consumer confusion.

THE ORIGIN OF THE PRIMARY INGREDIENT(S) OF A FOOD SHOULD BE THE PLACE OF PROVENANCE (= PLACE OF FARMING) OF THE RAW MATERIALS. IT SHOULD BE INDICATED AS PRECISELY (I.E. COUNTRY OR REGIONAL LEVEL) AS THE ORIGIN MENTIONED FOR THE FOOD PRODUCT ITSELF.

Modalities for origin labelling should reflect consumers' expectations as to what “origin” should refer to on different types of foods (place of provenance/farming vs. country of last substantial processing, farming stage(s) conferring origin, etc.). For processed foods (whether of animal or plant origin), most consumers would like to know both the country of provenance of the primary ingredients (i.e. where the raw materials were farmed) and the country where the food was manufactured. For the sake of consistency and in order to provide consumers with meaningful information, the origin of the primary ingredient(s) of a food should be given at the same geographical level as that indicated for the food itself.

III.1 Results from the research commissioned by BEUC

The first section of the questionnaire (Q1 to Q4) aimed at investigating consumers' general interest in origin labelling compared to a range of other factors (e.g. price, taste or brand) for different categories of foods, and, for those interested in this information, the reasons behind this interest and the expectations in terms of the geographical level of origin labelling. The second part of the questionnaire (Q5 to Q9) aimed at evaluating consumers' understanding of, and preferences for origin labelling on various food products (fresh meat, processed meat, and processed fruit/vegetables).

► A vast majority of consumers want to know the country their food comes from

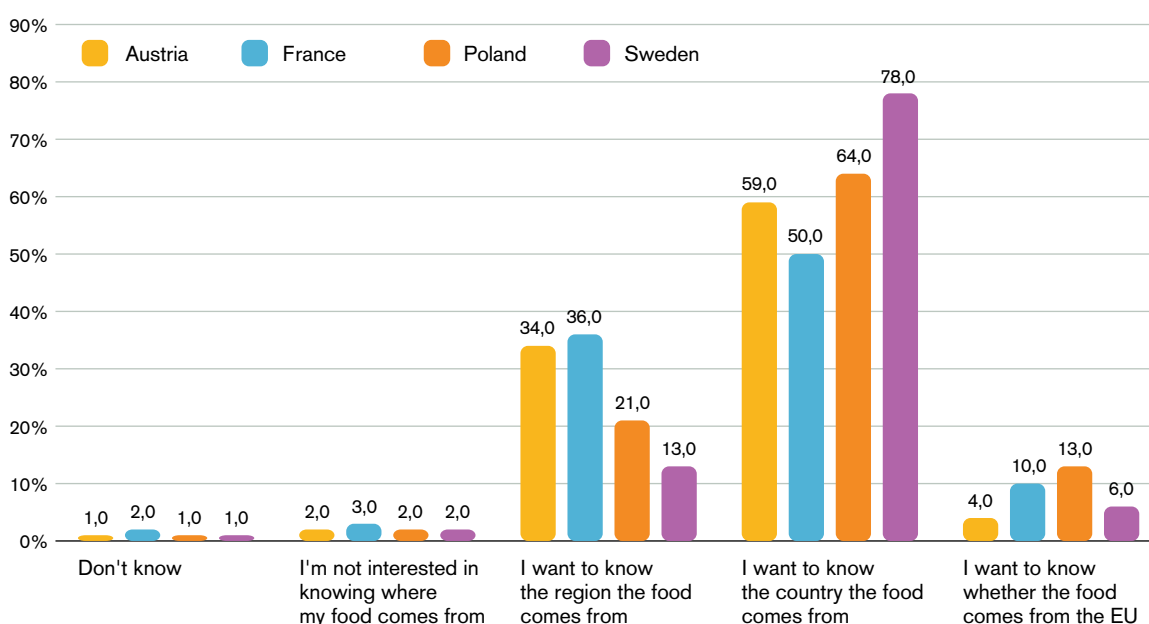
The results of the opinion surveys conducted in Austria, France, Poland and Sweden show a **clear interest on the part of consumers (in all four countries) in knowing the origin of the food they buy**. At least two-thirds of respondents in these countries (from 61% in Sweden to 77% in Austria) consider the origin as an important factor when buying food and it comes at the fifth or sixth place in terms of the factors consumers say they look at the most when choosing food (behind taste, price

and use-by/best-before dates but before brand and quality labels). As a general trend, younger people tend to report a lower interest in origin labelling compared to consumers in older age groups. In some but not all countries, the socio-economic status and/or gender can also affect the extent of consumers' interest in the origin of their food.

Categories of food products for which the highest proportion of consumers find it important that the origin is labelled include animal products (meat, milk and dairy products, fish) and fresh fruit and vegetables. **Meat** is the product that comes first in consumers' replies (83% – Sweden – to 93% – Austria – of consumers find it important that the origin is labelled on meat). Interest in the origin of **fresh fruit and vegetables, fish, and milk and dairy products** is also high and varies in the range 75%-90% depending on the country. Although a bit lower than for fresh fruit and vegetables, interest in the origin of **processed fruit and vegetables** is still marked (62% in Sweden to 79% in Poland). Likewise, half (in Sweden) to two-thirds of consumers (in Austria, France and Poland) find it important that the origin of **single-ingredient staple foods** (e.g. sugar, salt, flour) is labelled. Similar figures are observed for **coffee/tea**.

FIGURE 1 Q4. Thinking about what "origin" refers to on a food label, how precise would you like this information to be?

Base: All who think it's important that origin is on labelling



The reasons behind consumers' interest in the origin of their food vary between countries. For a majority of French and Polish consumers, they relate the origin of food to its **safety** (56% and 61% respectively) and **quality** (52% and 57%). Austrians primarily use origin information to assess the quality of food (56%) but also its **environmental impact** (50%). French, Swedish and Polish respondents, on the other hand, tend less to associate the origin of food to its environmental impact (38%, 38% and 17% respectively). 40%-45% of consumers in all four countries look at the origin of the food they buy due to **ethical concerns** they may have with some countries. In addition to the reasons previously enumerated, a third (France) to half (Austria, Poland, Sweden) of consumers are just interested in knowing where their food comes from. Finally, a minority of consumers (1%-3%) spontaneously reply they pay attention to the origin of their food as they wish to support the local economy/local farming or prefer regional products. Depending on the country, age, gender, educational level and/or the socio-economic status appear to have some influence on the reasons behind consumers' interest in the origin of their food.

In terms of the geographical level for origin information expected by consumers in Austria, France, Poland and Sweden, **a clear majority of them want to know the specific country their food comes from** (from 50% in France to 78% in Sweden). When consumers say they are not interested in the country of origin of food, it is mainly because they would like to find even more precise information on the label, i.e. the *region* the food comes from (from 13% in Sweden to 36% in France). It is clear from the low results (from 4% of consumers in Austria to 13% in Poland) that EU/non-EU labelling is not an option for consumers with only a small minority stating they would be satisfied with such an indication on their food (see Figure 1).

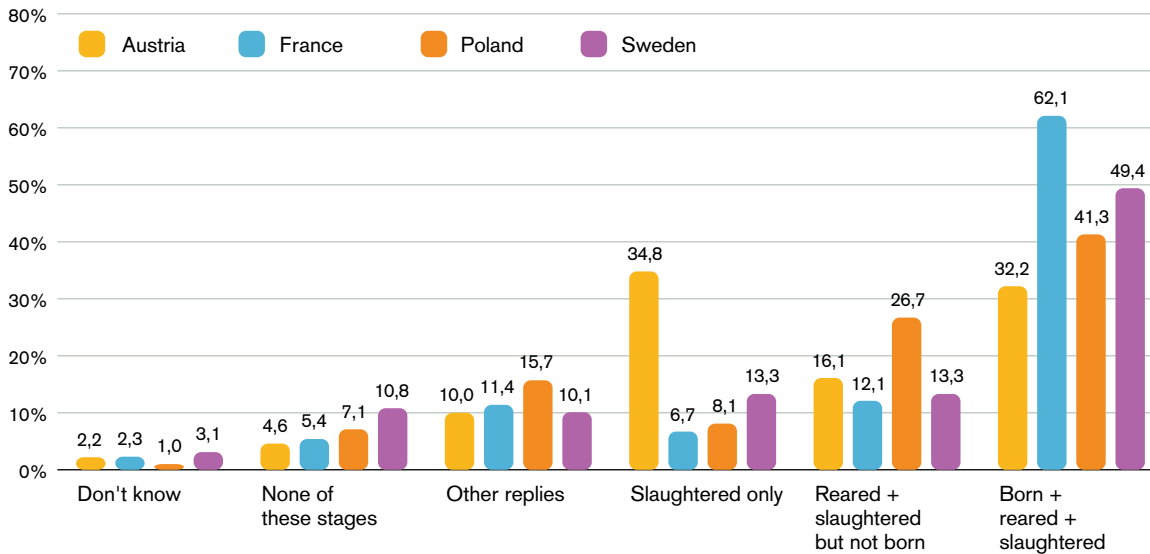
► **Current labels are confusing to some consumers and do not necessarily tell them what they would like to know about the origin of their food**

Although consumers are interested in country of origin labelling, **they do not necessarily have a clear understanding of what it actually refers to on specific food products** and their perception of the country of origin of a given food varies across countries.

When it comes to fresh meat (e.g. joints, fillets, chops), it is not always clear to consumers which of the animal's life stages (birth, rearing and slaughter) took place in the indicated country. Most consumers in France (62%), Poland (41%) and Sweden (49%) interpret country of origin on a fresh meat label as relating to the country where the animal was born, reared, and slaughtered. This is however not the case in Austria, where the proportion of consumers who believe that the labelled origin only refers to the country where the animal was slaughtered is higher than that of those who understand that the 3 life stages took place in the country (35% vs. 32%). The second reply most frequently given by French (12%), Polish (27%) and Swedish (13%) consumers is that the animal was reared and slaughtered, but not born, in the labelled country (as compared to 16% of Austrian consumers), followed by approximately 10% of consumers in these 3 countries who interpret that the animal was only slaughtered there. Interestingly, 5% to 10% of consumers do not seem to trust the label and doubt that any of the farming stages took place in the country the meat is stated to come from (Figure 2).

FIGURE 2 Q5. If you were buying fresh meat (e.g. joints, fillets, chops) and the country of origin was specified. What do you think happened in the country?

Base: All respondents

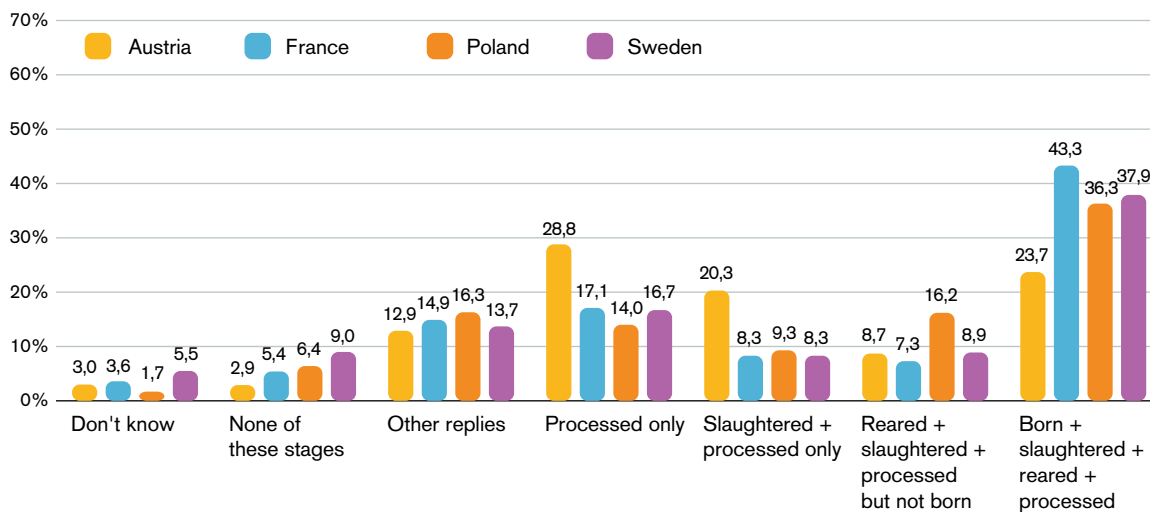


Many consumers are also unclear as to the meaning of country of origin labelling on processed meat products (e.g. bacon, ham, sausages). The main confusion is about whether the labelled country of origin refers to the country where the animal was produced and/or to that where the meat was further processed into the final food and consumers' perception in that regard varies across countries. The reply most frequently given by French (43%), Swedish (38%) and Polish (36%) consumers is that both the farming (incl. slaughter) and processing stages took place in the country, whereas those who

declare that only the final manufacturing step took place in the country specified on the label account for 17%, 18%, and 14% respectively. On the contrary, the reply that comes first among Austrian consumers is that the meat was only processed in the country (29%), whereas 24% of them believe that both the farming (incl. slaughter) and processing stages took place there. Once more, a small percentage (3% to 9%) of consumers declare they are not necessarily sure that any of the production stages actually took place in the country the meat product is said to come from (Figure 3).

FIGURE 3 Q6. If you were buying processed meat (e.g. bacon, ham, sausages, etc.) and the country of origin was specified. What do you think happened in the country?

Base: All respondents

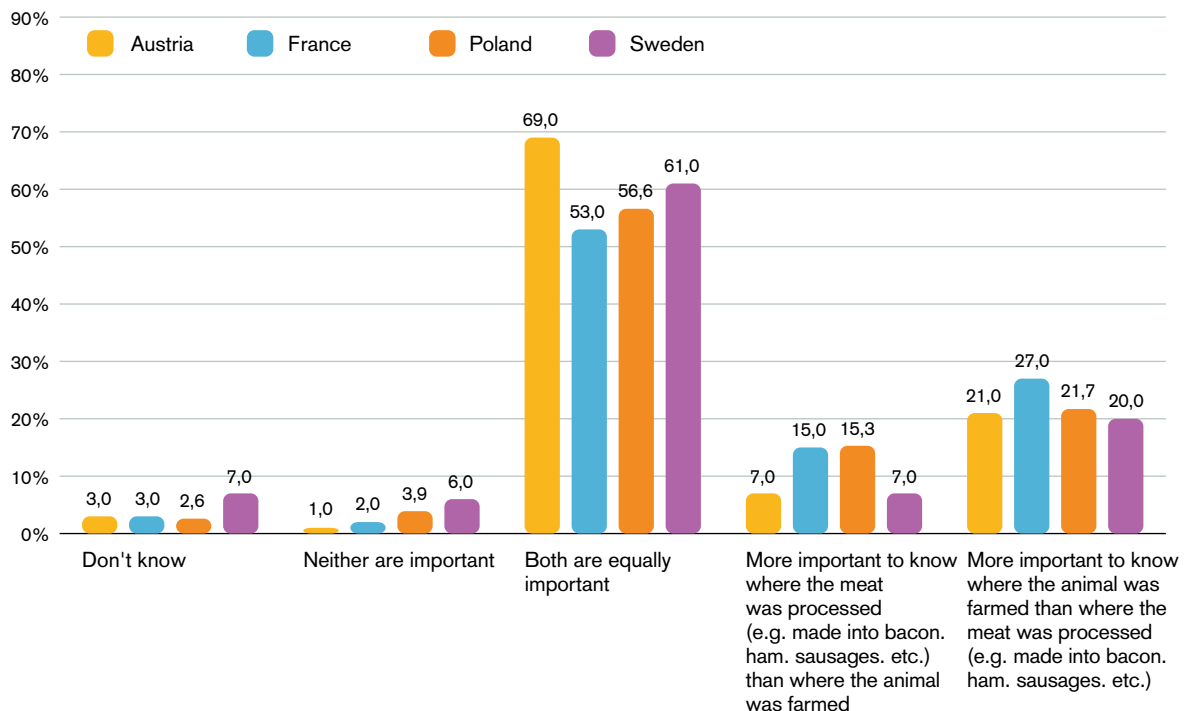


When asked about their **preferences for origin labelling on processed meat products (i.e. what they would like the labelled origin to refer to)**, consumers in Austria, France, Poland and Sweden give consistent and relatively similar replies. For a vast majority of them (from 53% in France to 69% in Austria), they are equally interested to know the country where the animal was farmed and that where the meat was further processed into the final product. For consumers who reply they are interested in either one of these pieces of information, they would rather want to know the country where the animal was farmed than that where the meat was

processed (Figure 4). It is interesting to note that replies given by consumers when asked about what they *would like* to know about the origin of their food differ from that given when asked about their *understanding* of actual labels: for instance, the proportion of Austrian consumers who say they are equally interested to know the country where the animal was farmed as that where the meat was processed is particularly high (69%) although, when asked about their interpretation of origin information on a processed meat product, Austrians tend to reply it only refers to the country where processing happened.

FIGURE 4 **Q7. Thinking about origin labelling on processed meat (e.g. bacon, ham, sausages, etc.), do you think it is more important to know where the animal was farmed or where the meat was processed into the final product?**

Base: All respondents

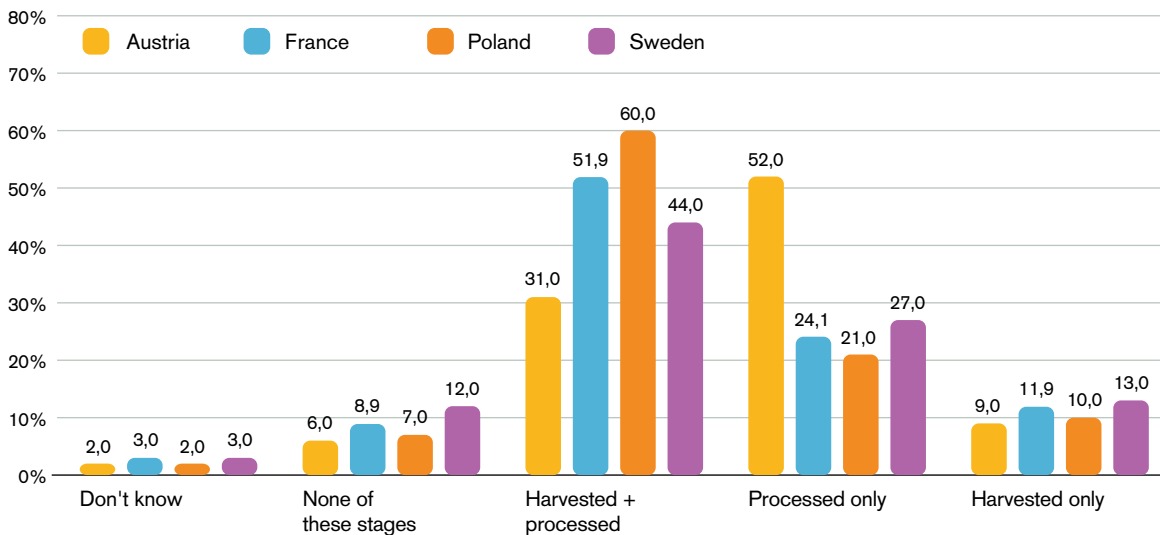


As with processed meat products, **consumers are also confused over the meaning of country of origin labelling on processed fruit and vegetables (e.g. jam, juice, sauce)**. It is not necessarily clear to them whether the country the product is said to originate from is that where the fruits/vegetables were produced (i.e. grown or harvested) and/or that where the fruits/vegetables were processed into the final product. Whilst most consumers in Poland (60%), France (52%) and Sweden (44%) interpret the labelled origin as referring to the country where both production steps took place, Austrians tend to have a different understanding and, for

a majority of them (52%), reply that the fruits/vegetables were only processed in the country (31% of Austrian consumers believe that the fruits/vegetables were both farmed and processed in the country). The second reply most frequently given by Polish (21%), French (24%) and Swedish (27%) consumers is that only the processing stage took place in the country. A minority of consumers in all 4 countries (around 10%) understand the labelled origin as referring to the place where the fruits/vegetables were produced. Finally, a small group of consumers (from 6% in Austrian to 12% in Sweden) are sceptical that any of the production stages actually took place in the country (Figure 5).

FIGURE 5 **Q8. If you were buying a jar of jam and the country of origin was specified. What do you think happened in that country?**

Base: All respondents

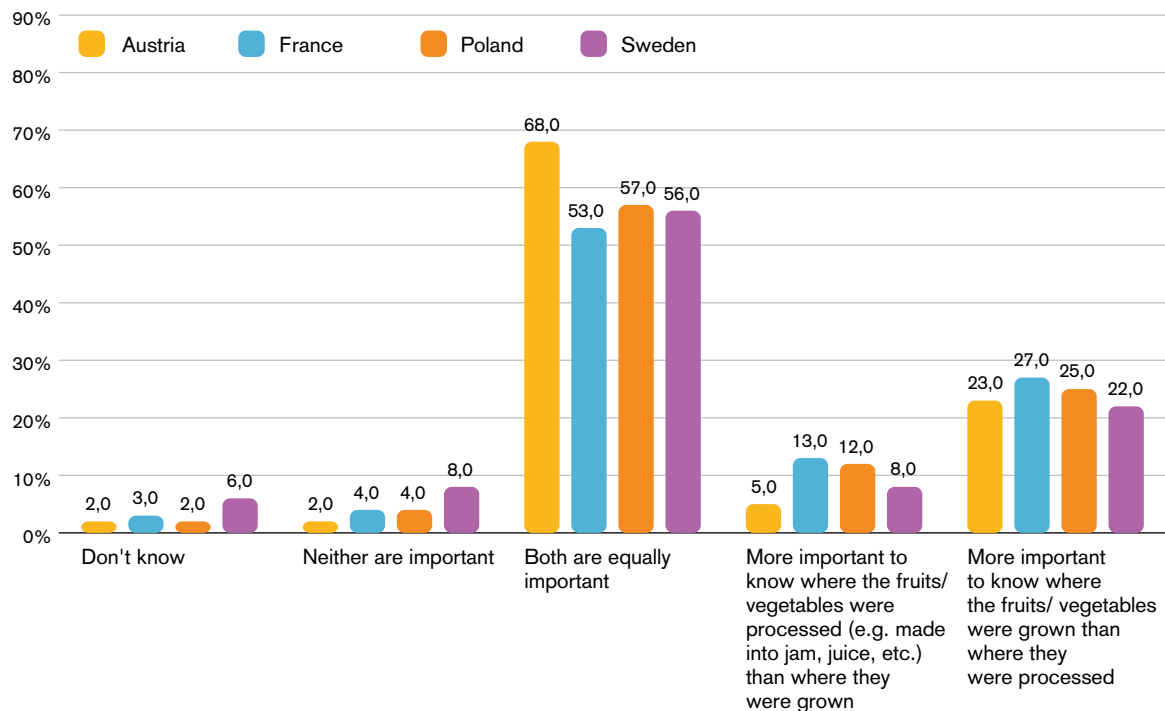


The study of consumers' replies **when asked about their preferences for origin labelling on processed fruit and vegetable products shows once more a gap between what they would like to find on the label and their actual understanding** of current food labels. Consumers in all 4 countries consistently reply that they are equally interested in knowing the country where the fruits/vegetables were produced as that where they were processed into e.g. jam, juice, sauce (from 53% in France to 68% in Austria). As for those who

are more interested in one or the other production stage, they tend to be more interested in knowing the country where the fruits/vegetables were harvested/grown (around 25%) than that where the final manufacturing step took place (from 5% in Austria to 13% in France) (Figure 6). The Austrian case again exemplifies the dichotomy between consumers' *interpretation* of current origin labels and their *expectations* in terms of what they would like these labels to tell them about the origin of their food.

FIGURE 6 **Q9. Thinking about origin labelling on processed fruit or vegetable products (jam, juice, sauce, etc.), do you think it is more important to know where it was grown or where it was processed?**

Base: All respondents



III.2 Comparison with the results from other recent research

The **results of the research commissioned by BEUC confirm the findings from other recent studies** which, among other aspects, investigated European consumers' interest in the origin of their food.

The **Special Eurobarometer⁴ on Europeans' attitude towards food security, food quality and the countryside** found that, on average, "a substantial majority (71%) [of EU citizens] say that the origin of food is important" (as in BEUC's study, this proportion was lower (57%) among younger people who said that origin was important to them). Looking at specific country results, citizens in Austria, France, Poland and Sweden were respectively 78%, 75%, 71% and 79% to reply that origin is important to them when buying food. These figures are similar to that observed in BEUC's research.

The **European Commission's study of the functioning of the meat market for consumers in the EU⁵** addressed the question of consumers' motivation and priorities when shopping for meat. Whether the meat comes from their country is the fifth factor European consumers say they take the most into account, behind the freshness, taste, hygienic aspect and price of meat. Factors they look at the most when buying fresh meat are the price per kilogram, the price, the use-by/best-before date and the country of origin, followed by the producer, origin certifications, the list of ingredients and animal welfare labels. For meat products, consumers primarily pay attention to the use-by/best-before date, the price, the price per kilogram and the country of origin, followed by the producer, the list of ingredients, origin certifications and the nutritional value. The findings of this study are in line with that of BEUC's survey and confirm consumers' interest in the origin of meat and processed meat products.

Most recently, in July 2012, the **Czech Association of Consumers DTEST** carried out a survey⁶ on origin labelling using the questionnaire drafted for the purpose of BEUC's research, which was administered online to a panel of subscribers and followers. Although the panel of respondents was not representative of the average population in the Czech Republic, the data collected still provides valuable insight into Czech consumers' interest in, and understanding of origin labelling. 89% of respondents replied that origin is important to them when buying food (as compared to 80% of the representative panel of Czech citizens interviewed in the Eurobarometer survey), essentially because it helps them assess the safety and quality of food. A majority of Czech consumers (71%) want to know the country their food comes from and, when asked about their preferences for origin labelling on processed foods, 83% reply they are equally interested in knowing the country of farming (of animals or fruits/vegetables) as that of processing.

The **Greek consumer organisation KEPKA** conducted similar research in September 2012 (also based on BEUC's questionnaire)⁷. The panel of respondents was not representative of the Greek population as the questionnaire was published on KEPKA's website; however, the survey results confirm the findings of the Eurobarometer report No 389. 92% of Greek consumers surveyed declared that origin is important to them when buying food (as compared to 90% of Greek citizens in the Eurobarometer report). Origin comes in 3rd place in terms of the factors they say they look at the most, behind taste (98%) and price (97%) but before appearance (63%), convenience (61%) and brand (49%). Almost all respondents (97-98%) find it important that origin is labelled on meat, fish, milk and dairy products, and fresh fruit and vegetables.

4 Special Eurobarometer report No 389: Europeans' attitude towards food security, food quality and the countryside, July 2012.

5 To be published. Results available at: [http://www.llkc.lv/upload_file/401466/Paulina%20Gbur_Outcomes_Kaunas%20\[Read-Only\]%20\[Compatibility%20Mode\].pdf](http://www.llkc.lv/upload_file/401466/Paulina%20Gbur_Outcomes_Kaunas%20[Read-Only]%20[Compatibility%20Mode].pdf)

6 The survey was conducted online between 13-20 July 2012 on a panel of circa 1700 subscribers and followers of DTEST.

7 1556 Greek consumers participated in the survey. The survey was conducted in September 2012, using a questionnaire published on KEPKA's website (98% of respondents). At the same time, a printed version was disseminated through KEPKA's offices to individuals not having access to the internet (2% of respondents). The full results of the survey are available on KEPKA's website at: http://kepka.org/index.php?option=com_content&task=view&id=1923&Itemid=237

A vast majority of them also want origin labelling on processed fruit and vegetables (91%), staple foodstuffs (86%) and coffee/tea (76%). Greek consumers mostly relate the origin of food to safety (71%), quality (61%) and ethical (52%) concerns. As for the geographical level they are interested in, 60% of Greek consumers want to know the country their food comes from or even, for 37% of them, the specific region. Only very few respondents (3%) replied they would be satisfied with EU/non-EU origin indication.

Additional research on origin labelling has been carried out by **consumer organisations in Belgium (Test-Achats), Italy (Altroconsumo), Portugal (DECO Proteste) and Spain (OCU)** (the four organisations used a joint questionnaire that was administered to a representative panel of the population in each country) and by the **Danish Consumer Council** (who used BEUC's questionnaire). The results of these studies will provide valuable insight into consumers' interest in, and demand for origin information in an additional five Member States.

Previous research by BEUC members had already shown strong consumer demand for origin labelling.

In the UK, a 2009 survey⁸ by the consumer organisation Which? found that 3 out of 4 people wanted origin labelling for meat and poultry products. Around three quarters believed it important that the origin be labelled on fruits and vegetables (77%), dairy products (76%), fish (73%) and the meat and poultry used in processed foods (74%). These results have since been reaffirmed in an on-line survey conducted by Which? in June 2011. Likewise, a 2007 survey⁹ by the German consumer organization VZBV showed that most consumers were not satisfied with the current (lack of) information on the origin of food and that many of them wanted this information to always be given for meat (80%) and milk (60%) as well as for the main ingredient in multi-ingredient foods (88%). In Sweden, a 2003 survey¹⁰ commissioned by the Stockholm Consumer Association found that 67% of the respondents always or usually looked for the origin of food on the label. Whilst 64% of interviewed people replied this information was "very important" for all foods, the interest was even higher when it came to meat (84%, vs. 76% in 1999), meat-based products such as sausages and pies (81%, vs. 68% in 1999), and frozen and chilled ready meals (67%).

8 Which? research from September 2009 <http://www.which.co.uk/about-which/press/press-releases/campaign-press-releases/food-and-health/2010/01/country-of-origin-rules-should-be-expanded-says-which/>

9 Verbraucherzentrale, Bundesweite Umfrage "Lebensmittel aus aller Welt – Kennzeichnung lückenhaft und missverständlich", Eine Gemeinschaftsaktion der Verbraucherzentralen, Juli 2007, at http://www.vzbv.de/mediapics/bericht_umfrage_herkunft_von_lebensmitteln_23.07.2007_copy.pdf

10 SKOP (2003). Survey looking at consumers' attitude regarding the origin of food (500 members of the Stockholm Consumer Association interviewed)

III.3 Recommendations

According to Regulation (EU) 1169/2011 on the provision of food information to consumers, the European Commission is due to prepare a series of reports and impact assessments on origin labelling for different categories of foods, which “shall take into account the need for the consumer to be informed” (Art. 26 (7)). The findings from the present report, which provide insight into consumers’ interest in, understanding of, and expectations for food origin labelling in four European countries, in addition to those from previous or recent consumer research on origin labelling (see above), allow us to draw up a number of recommendations in terms of what future origin labelling provisions should look like if consumers’ interests are taken into account.

► **Origin labelling should become mandatory for all meats, meat used as an ingredient, milk, milk used as an ingredient in dairy products, unprocessed foods, single-ingredient products and ingredients that represent more than 50 % of a food.**

As shown by BEUC’s study and the recent Eurobarometer 389, around 70% of European consumers consider the origin as an important factor when buying food and find it important that this information is indicated on food labels. A substantial majority of consumers want to know the origin of meat (whether processed or not), fish (whether processed or not), milk and dairy products, and fruits and vegetables and more than half of them also find it important that the origin of single-ingredient foodstuffs (e.g. sugar, salt, flour) and of coffee/tea is labelled.

Full account should be taken of this strong demand on the part of European consumers for origin information on food. As an increasing number of industry operators deliberately communicate on the origin of their products for marketing reasons – sometimes misleading –, it is not acceptable that, at the same time, consumers continue to be

denied the right to know where their food comes from when they request this information. Country of origin labelling should therefore become mandatory for all food categories listed in Article 26(5) and (6) of Regulation (EU) 1169/2011 on Food Information.

► **Origin labelling on food should be (at least) at the country level to bring meaningful information to consumers.**

As revealed by BEUC’s survey, the vast majority of consumers in Austria, France, Poland and Sweden want to know the specific country, if not the specific region, their food comes from. A mere indication of whether or not the food comes from the EU would not respond to their demand.

As already pointed out, as a result of the growing trend for more “local” food, manufacturers’ own claims as to the origin of their products are multiplying, sometimes at very precise geographical level, and this for all kinds of foodstuffs (processed or unprocessed, animal- or plant-based, staple or composite foodstuffs, etc.). Thus, it would only be legitimate to expect that the same level of information be provided more systematically on similar foodstuffs. Origin labelling on food should be (at least) at the country level to bring meaningful information to consumers.

► **Rules for origin labelling on meat of pig, poultry, sheep and goat should follow those already in place for beef meat (i.e. “origin” covering the place(s) of birth, rearing and slaughter).**

BEUC’s survey has shown consumers are not always clear as to what origin labelling currently means on different food products, i.e. they have difficulties finding out what happened in the country a food is said to come from. It should be more transparent what step(s) of the farming and/or manufacturing process have taken place in a given country where

a food is said to originate from that country. More explicit food labels (i.e. stating clearly what actually happened in the country in terms of the farming of the raw ingredients and their processing into the final food) would help in that regard.

Moreover, consistency in the modalities for origin labelling within and across different food categories would also help avoid consumer confusion. The geographical level and definition of “origin” (based on specific farming and/or processing steps) should, as much as possible, be aligned for comparable foodstuffs. For instance, rules for origin labelling on pig, poultry and sheep and goat meat should follow those already in place for beef meat.

Of course, sufficient control by competent authorities should be in place so that consumers can be clear as to what origin information on food labels truly refers to and can trust it. It is striking indeed that up to 10% of consumers in some countries do not trust origin labelling and doubt whether any of the production steps actually took place in the area where a food is said to originate from.

► **The origin of the primary ingredient(s) of a food should be the place of provenance (= place of farming) of the raw materials. It should be indicated as precisely (i.e. country or regional level) as the origin mentioned for the food product itself.**

As highlighted in BEUC's survey, current modalities for origin labelling do not necessarily reflect consumers' expectations as to what “origin” should refer to on different types of foods (place of provenance/farming vs. country of last substantial processing, farming stage(s) conferring origin, etc.). This is particularly true for processed foods (whether of animal or plant origin), for which most consumers would like to know both the place of provenance of the primary ingredients (i.e. the country where the raw materials were farmed) and the country where the food was manufactured. Origin labelling rules that would be modelled on the Union Customs Code (i.e. essentially linked to the place of last substantial transformation) would largely fail to respond to consumers' expectations. Moreover, for the sake of consistency and in order to provide consumers with meaningful information, the origin of the primary ingredient(s) of a food should be given at the same geographical level as that indicated for the food itself.

IV

Detailed country results

IV.1 Importance of origin information to consumers when buying food

Respondents were shown a closed list of eleven factors related to food (taste, price, etc.) and asked how important these factors are to them when buying food.

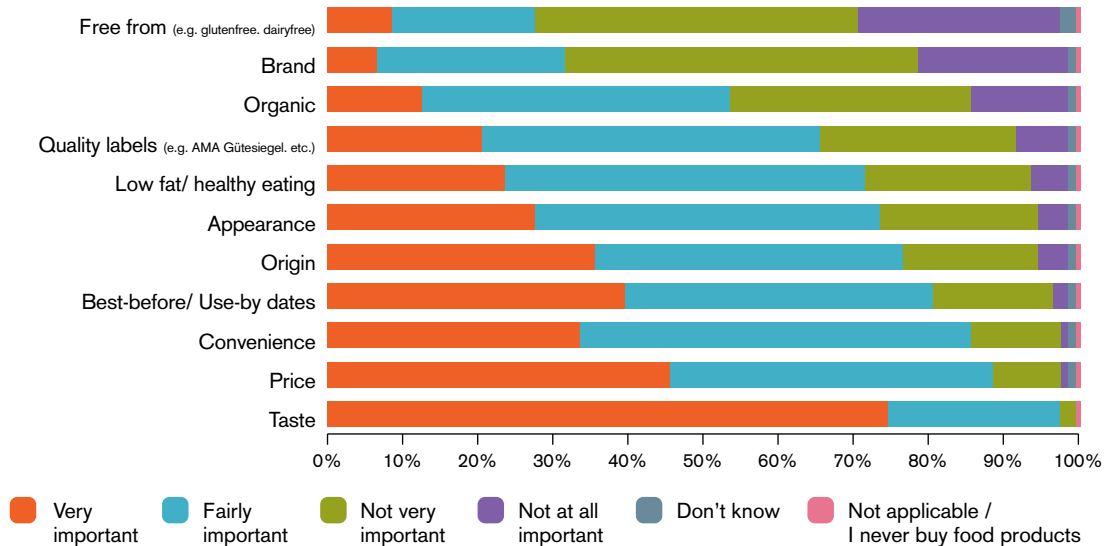
► Austria

More than three quarters (77%) of respondents in Austria declare that the origin is important (36% find it “very important” and 41% “fairly important”), making it the fifth most important factor behind taste (97% of respondents find it important), price (89%), convenience (84%), and best-before/use-by dates (81%). Interestingly, brand is seen as a much less important factor (31%) than origin (Figure 7).

There are no strong gender-related patterns, although women are slightly more likely (40%) than men (32%) to find origin “very important”. The education level, the household size and the presence of children do not seem to affect the interest in food origin.

On the other hand, age is an influential parameter with younger people slightly less likely to consider origin as important when buying food: 64% of respondents in the age group 16-24 find it important (compared to 74% in the age group 25-34, 83% in 35-44 and 81% in 45-54). Economic status also has an influence. Respondents from working class backgrounds and those at the lowest end of the social scale tend to be less interested in the origin of the food they buy (65%) compared with those who are better-off (80% of respondents in the upper class and 78% in the middle class).

FIGURE 7 **Q1. How important is each of the following factors to you when you buy food products if at all?**
Base: All respondents



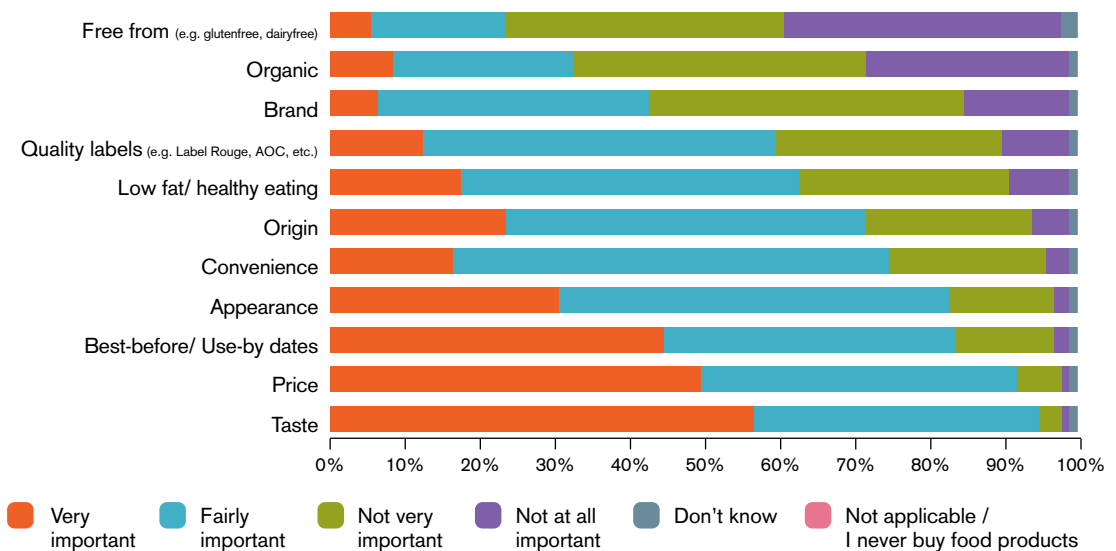
► France

When buying food, 71% of French consumers consider origin as an important factor (18% find it “very important” and 45% “fairly important”). Taste comes first in terms of the factors most respondents (96%) say they find important when shopping for food, followed by price (93%), best-before/use-by dates (84%), appearance (82%) and convenience (75%). Brand is once again reported as a less important factor (43%) than origin (Figure 8).

Both men and women are equally likely to consider origin as an important factor when buying food. Interest in the origin of food does not seem to be influenced by education status, the household size or the presence of children.

On the other hand, there appears to be a strong link between age and interest in origin labelling. Results from our survey suggest that younger people in the age-group 16-24 are significantly less likely (53%) to care about the origin of their food than respondents in the age groups 25-43 (71%), 35-44 (75%), 45-54 (75%), and 55-64 (81%). Conversely, older consumers in the age group 55-64 tend to be more interested in origin than the average of respondents. Whilst economic status does not seem to affect respondents’ attitude towards origin in France, those who are regular grocery shoppers are more likely to find it more important than those who buy food only occasionally (73% compared to 58%).

FIGURE 8 Q1. How important is each of the following factors to you when you buy food products if at all?
Base: All respondents

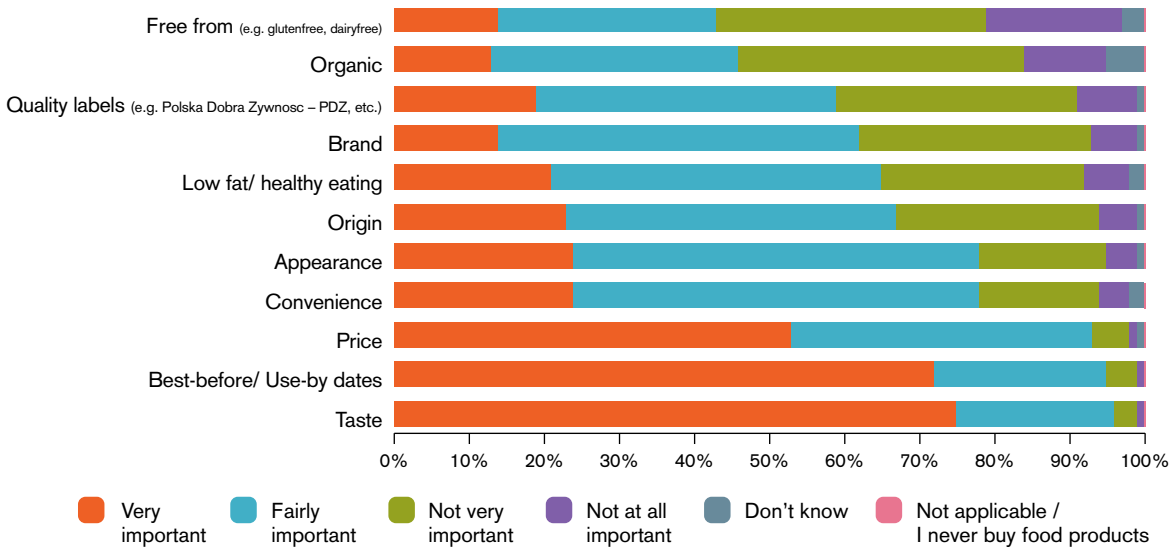


► Poland

Two-thirds (66%) of Polish consumers consider origin as an important factor when buying food (22% of them find it “very important” and 44% “fairly important”), which is slightly more than the 62% who respond that brand is a factor they tend to pay attention to when shopping for food. As in Austria and France, taste is the factor that most respondents (96%) say is important to them, followed by best before/use by dates (94%), price (93%), convenience (79%), appearance (78%) and origin (Figure 9).

Whilst neither the gender nor the social status or the size of the household seems to influence Polish respondents’ degree of interest in the origin of their food, age is again a determining factor. Polish consumers in the age-group 16-24 tend to be less interested (53%) in knowing where their food comes from than those in the age-groups 25-34 (70%), 35-44 (75%) and 45-54 (67%). Respondents who are regular grocery shoppers are also more likely to look at the origin of their food (67%) than those who buy food only occasionally (43%).

FIGURE 9 **Q1. How important is each of the following factors to you when you buy food products if at all?**
Base: All respondents

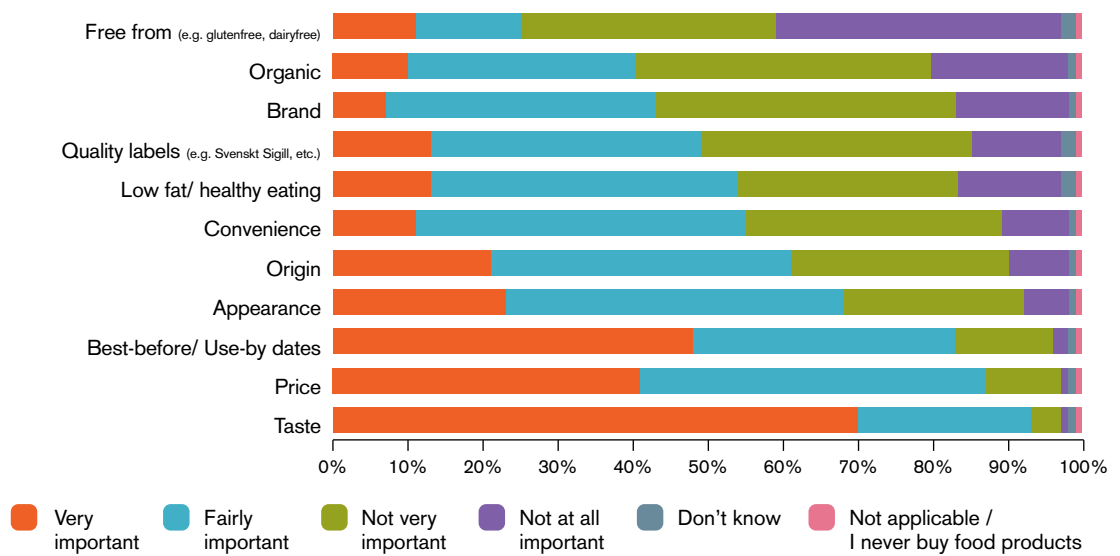


► Sweden

When shopping for food, 93% of Swedish consumers consider taste as an important factor, followed by price (88%), best-before/use-by dates (84%) and appearance (68%). Origin comes in the fifth place, with 61% of respondents saying it is an important factor to them (21% find it “very important” and 41% “fairly important). 43% of respondents pay attention to the brand of the food, whilst 25% say they look at the absence of particular ingredients (e.g. free from gluten) (Figure 10).

When crossing the replies given by respondents with the panel's demographics, it appears that women are more interested (68%) than men (55%) in knowing where their food comes from. The age of respondents also seems to have a slight influence on their general interest in the origin of their food: in the 16-24 age group just over half of respondents (52%) consider the origin as an important factor when buying food, as opposed to 61% in the general population.

FIGURE 10 **Q1. How important is each of the following factors to you when you buy food products if at all?**
Base: All respondents



IV.2 Importance of origin labelling to consumers for different categories of foods

Respondents were shown a list of different food categories (meat, dairy products, etc.) and asked how important it is to them that the origin is labelled for these various types of foods.

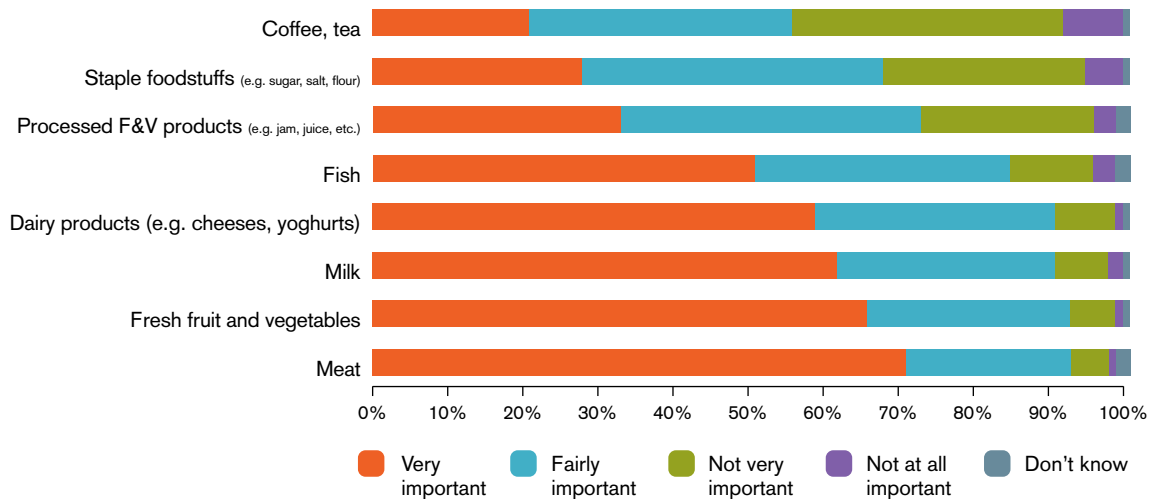
► Austria

The degree of interest in, and demand for origin information on food labels varies according to the type of foods considered. In general, animal products and fresh fruit and vegetables are the food products for which most Austrians are interested in knowing the origin. A vast majority of respondents find it important that origin is labelled on meat (93%), on milk (90%), on dairy products (90%) and on fish

(84%). 91% of respondents are interested in origin information for fresh fruit and vegetables, compared to 73% for processed fruit and vegetables (e.g. jam, juice). As for staple foods (e.g. sugar, flour, salt) and coffee/tea, origin labelling is important to two-thirds (66%) and over half (55%) of respondents respectively (Figure 11).

FIGURE 11 **Q2. How important do you think it is that the country of origin is labelled on the product for each of the following food products?**

Base: All respondents



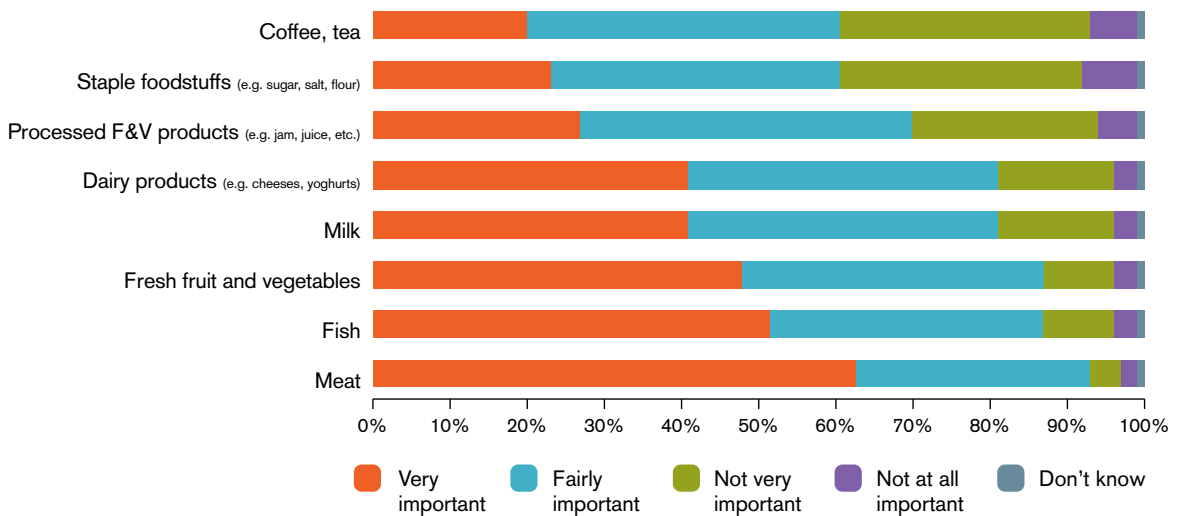
► **France**

A high proportion of French consumers find it important to have origin labelled on meat (92%), fish (87%), fresh fruit and vegetables (87%), milk (81%) and dairy products (81%). Over two-thirds (70%) of respondents want to find this information

on processed fruit and vegetables (e.g. jam, juice), compared to 60% of respondents for kitchen cupboard staples (e.g. sugar, flour, salt) and coffee/tea (Figure 12).

FIGURE 12 **Q2. How important do you think it is that the country of origin is labelled on the product for each of the following food products?**

Base: All respondents



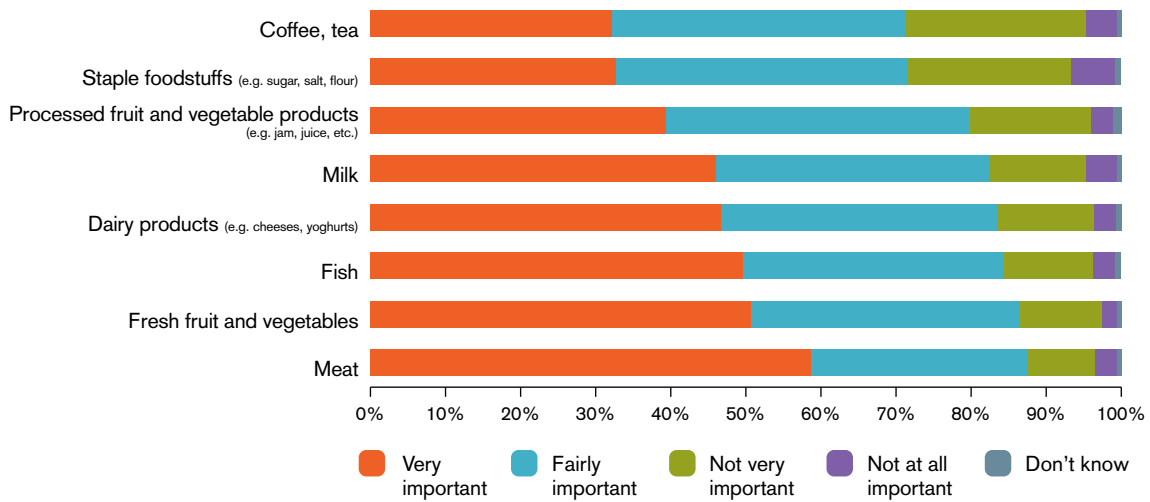
► Poland

When asked how important they think it is that the country of origin is labelled on specific foodstuffs, Polish consumers tend to give quite similar replies regardless of the categories of products and interest in origin is generally high for various types of foods: 88% of respondents find it important that origin is

labelled on meat, 86% on fresh fruit and vegetables, 85% on fish, 84% on dairy products, 83% on milk, 79% on processed fruit and vegetables, and 71% on staples (e.g. sugar, salt, flour) and coffee/tea (Figure 13).

FIGURE 13 Q2. How important do you think it is that the country of origin is labelled on the product for each of the following food products?

Base: All respondents



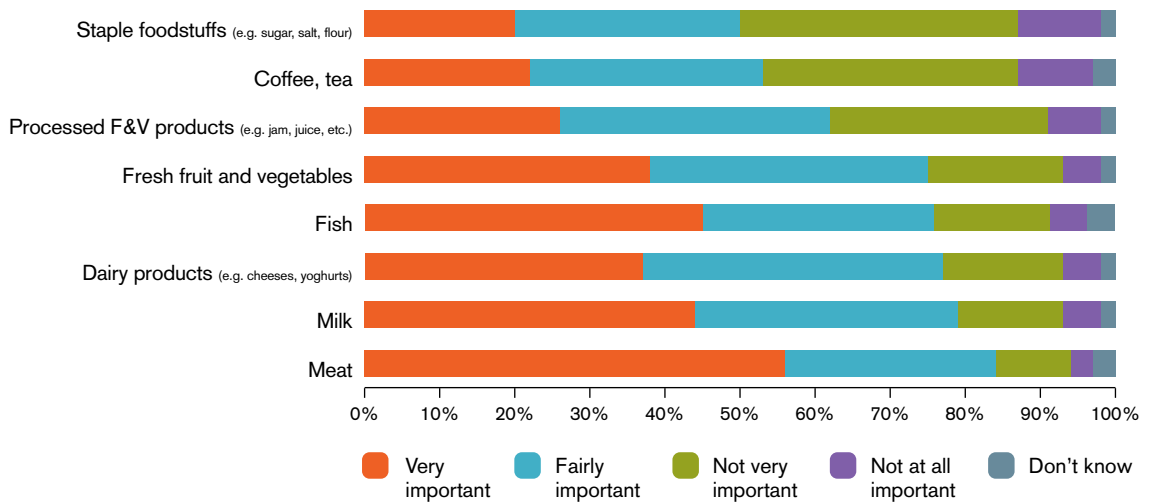
► Sweden

The majority of Swedish consumers questioned (83%) reply they think it is important that the country of origin is labelled for meat, followed by milk (79%), dairy products (77%), fish (75%) and fresh fruit and vegetables (74%). Interest in the origin of processed

fruit and vegetables (62%), coffee/tea (53%) and single-ingredient foods such as sugar, salt, flour, etc. (50%) is a bit less marked, although at least half of the respondents still find it important that the origin is indicated also on these products (Figure 14).

FIGURE 14 Q2. How important do you think it is that the country of origin is labelled on the product for each of the following food products?

Base: All respondents



IV.3 Main reasons for consumers' interest in the origin of their food

Those respondents who found it important to have origin labelled on (at least some) food products in Q2 were then asked to justify their reply and explain the reasons why they are interested in this information. A list of such reasons was provided to them (e.g. "it helps me assess the quality", "I use it as a way of assessing the environmental impact", etc.) but respondents were also given the possibility to give spontaneous replies (e.g. some referred to "length of transport routes", "sustainability", "environmental pollution" – all three finally accounted for in "assessing the environmental impact" – or "support of local economy/farming").

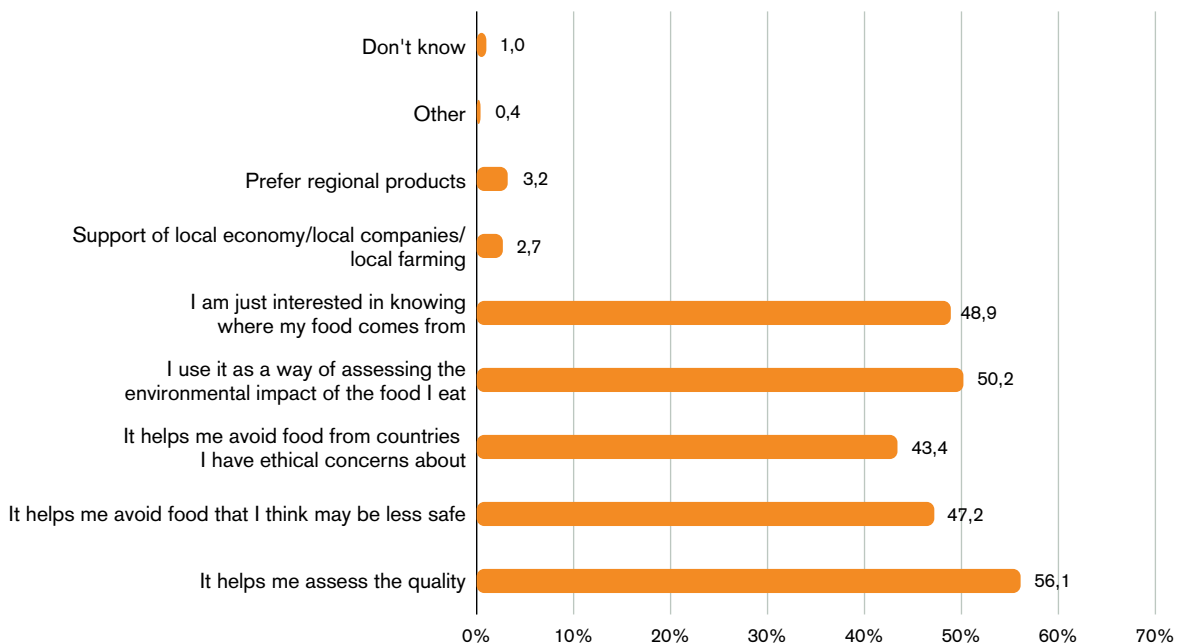
► Austria

For a majority of Austrian respondents (56%), origin helps them assess the quality of the food they buy. Half of them use this information as a way of assessing the environmental impact of food. 47% of Austrians who find it important that the origin of food is labelled have concerns that food from certain origins might be less safe and 43% of them want to

avoid food from countries they have ethical concerns about. For nearly half of respondents (49%), origin is just a piece of information they are interested in. Finally, 3,2% find it important as they "prefer regional products" whilst 2,7% look at the origin of food to "support the local economy/local farming" (Figure 15).

FIGURE 15 **Q3. What are the main reasons why you think it is important that the origin of food is given on the label?**

Base: All those who think it's important that origin is on labelling



Gender, age, household size or the presence of children do not seem to affect the reason(s) behind respondents' interest in origin labelling. The educational level has a slight influence: those having finished their studies at the age 17-19 tend to be slightly more likely (52%) to find origin important with regard to food safety compared to those having finished their studies at the age 20 and older (43%).

On the contrary, the latter are more likely (52%) to look at origin to assess the environmental impact of food than the former (42%). The most distinct patterns are found with respect to the socio-economic status: respondents in the upper and middle classes are more likely (54%) to use origin as a proxy of a food's environmental impact than those from the lower social classes (37%).

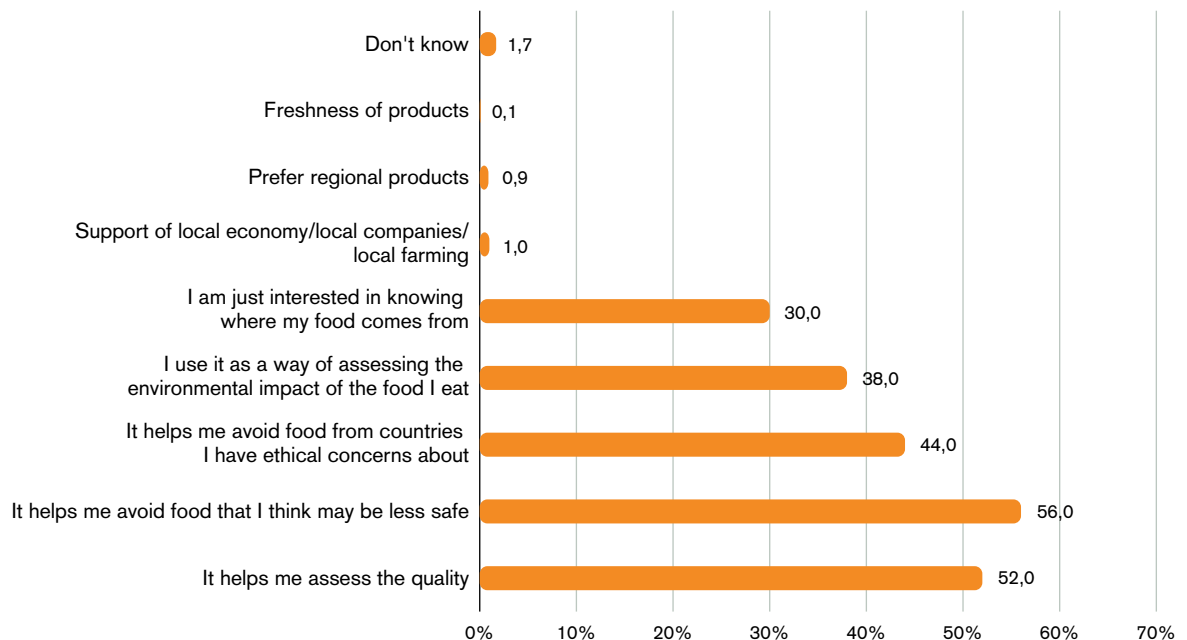
► France

The reason most frequently given by French consumers (56%) is that it helps them avoid food that they think might be less safe. Nearly as many respondents (52%) reply that knowing the origin of a food helps them assess its quality. Then come ethical (44%) and environmental (38%) concerns.

A third (30%) of respondents are “just interested in knowing where their food comes from” (another 0,9% simply “prefer regional products”). 1% are interested in their food’s origin as they want to support the local economy (Figure 16).

FIGURE 16 Q3. What are the main reasons why you think it is important that the origin of food is given on the label?

Base: All those who think it's important that origin is on labelling



The age of respondents seems to have some influence on the reasons why they want to know the origin of their food. Young people in the age group 16-24 are slightly more likely (60%) to use origin as a proxy of quality than people in the age group 55-64 (48%). On the other hand, the latter (and, to a lesser extent, those in the age groups 45-54 and 35-44) tend to link more origin and safety (respectively 62%, 60% and 57% compared to only 46% amongst younger people in the age group 16-24). The same goes for ethical concerns, which 51% of respondents in the age group 55-64 and 52% of those in the age group 45-54 refer to as a reason

for looking at the origin of food, whereas only 34% (respectively 37%) of consumers in the age group 16-24 (respectively 25-34) declare avoiding food from a certain origin over ethical concerns.

As for the socio-economic status, it plays only a minor role and appears to be only related to respondents' tendency to look at the origin of food with environmental concerns in mind: whilst 42% of French consumers in the upper and middle classes say that the origin of food helps them assess its environmental impact, the same is true for only 33% of those at the lowest-end of the social scale.

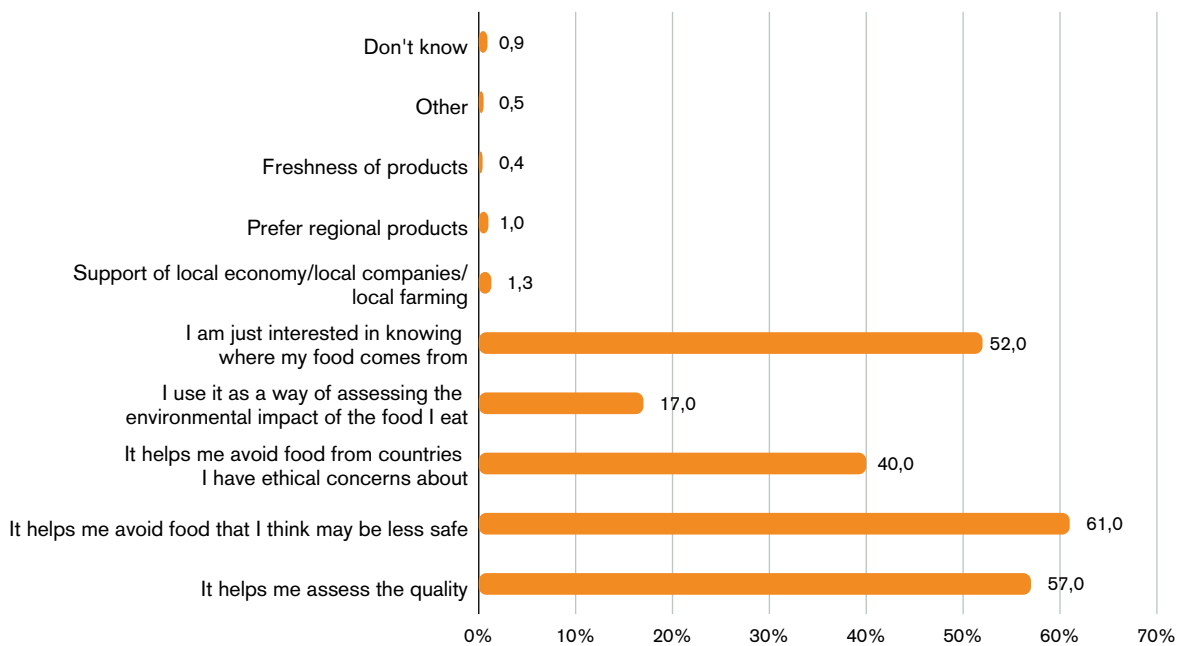
► Poland

For most Polish consumers (61%), knowing the origin helps them avoid food they think may be less safe. For 57% of them, it also helps them assess the food's quality, and half of respondents (52%) reply they are just interested in the origin of their food without giving any particular reason. Over a third (40%) wish to avoid food from certain origins over ethical concerns, whilst only 17% of respondents

use origin information as a way of assessing the environmental impact of the food they buy (Figure 17). A few respondents (1,3%) spontaneously replied they are interested in the origin of their food as they want to support local companies/farming. Another 1% prefer regional products and, for 0,4% of respondents, origin is linked to the freshness of products.

FIGURE 17 **Q3. What are the main reasons why you think it is important that the origin of food is given on the label?**

Base: All those who think it's important that origin is on labelling



Younger respondents in the age-group 16-24 are slightly less likely (53%) to associate the origin of food with safety compared to consumers in the age-groups 25-34 (65%), 35-44 (62%) and 45-54 (65%). Likewise, those who are better off tend to be more concerned (66%) about the safety of food

coming from certain origins than those in the lowest social classes (53%). The latter are also less likely to be concerned about the origin of their food over ethical reasons (only 30%, as opposed to 43% and 42% in the upper and middle class respectively).

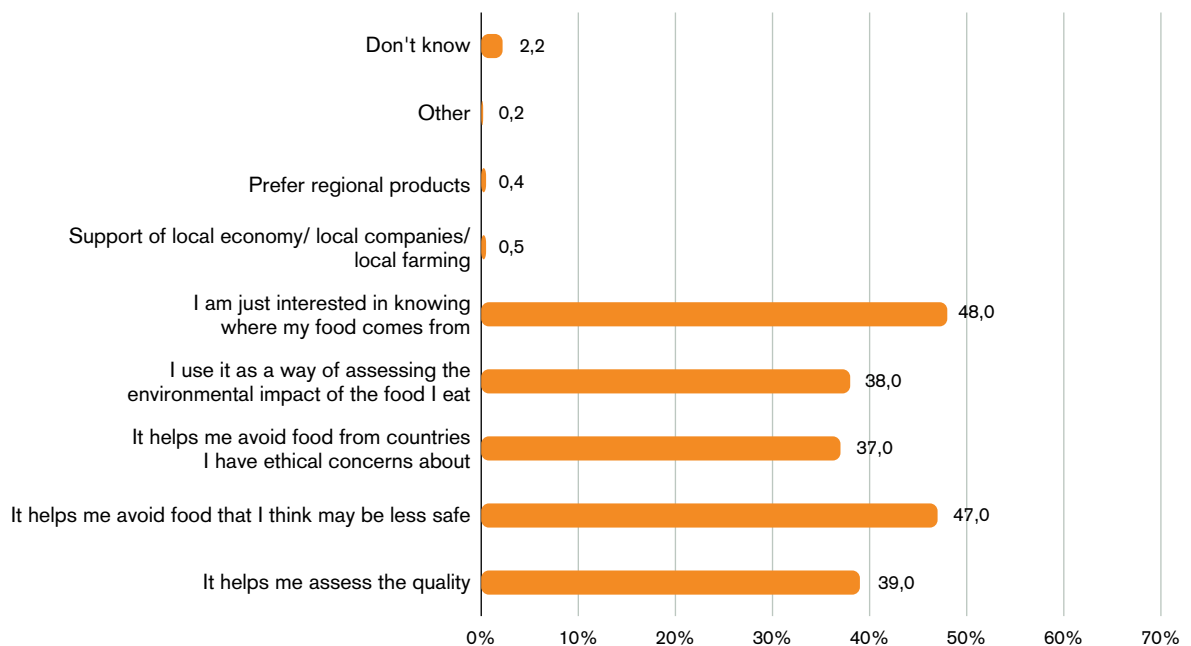
► Sweden

The two reasons most frequently given by Swedish consumers when asked to specify why they think it is important that the origin is labelled on (at least some) foods, are that they are just interested in knowing where their food comes from (48%) and that it helps them avoid food that they think may be less safe (47%). 39% of them use this information to judge the quality of the food they buy and almost as

many (38%) to assess its environmental impact. For 37% of respondents, knowing the origin also allows them to avoid food from countries they have ethical concerns about (Figure 18). Finally, a few of them state they are interested in origin labelling because they want to support the local economy (0,5%) or because they prefer regional products (0,5%).

FIGURE 18 **Q3. What are the main reasons why you think it is important that the origin of food is given on the label?**

Base: All those who think it's important that origin is on labelling



As far as the environmental impact of food is concerned, male respondents are slightly less likely (33%) to associate it with the origin of food than women (43%). Likewise, older people in the age group 55-64 are less likely (29%) to use origin information as a way to assess the environmental impact of the food they buy than those in the age-groups 16-24 (42%), 25-34 (49%) and 35-44 (39%).

Socio-economic status also affects the reason(s) for Swedish consumers' interest in knowing the origin of their food: those at the lowest end of the social scale tend less to look at the origin of food over ethical (30%) or environmental (31%) concerns than those in the upper and middle classes (respectively 40% and 43%).

IV.4 Geographical level for origin labelling expected by consumers

Those respondents who found it important to have origin labelled on (at least some) food products in Q2 were also asked about how precise they would like this information to be.

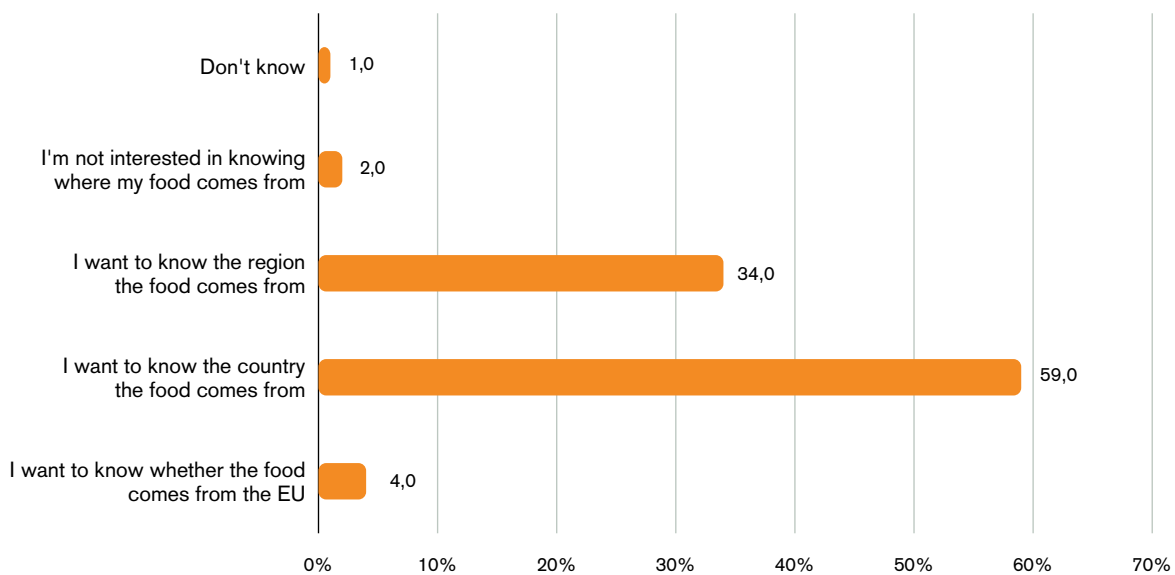
► Austria

The majority of Austrians who find it important that origin is labelled want to know the *country* their food comes from (59%). *EU/non-EU* origin is sufficient information to only 4% of them. On the other hand,

34% want even more precise information and would like the *region* the food comes from to be labelled (Figure 19).

FIGURE 19 **Q4. Thinking about what “origin” refers to on a food label, how precise would you like this information to be?**

Base: All who think it's important that origin is on labelling



Although no strong age-related patterns emerge from the data, those in the age group 45-54 tend to be more interested (42%) in the regional level than the average of respondents (34%), and especially younger people (26%). Neither the educational level nor the socio-economic status has a significant influence on the desired geographical

level for origin information. On the other hand, those looking the most at origin when buying food (“very important” at Q1) are also those expecting the most precise information (43% of them would like origin information to be given at the regional level, compared to 34% for the average of respondents).

► France

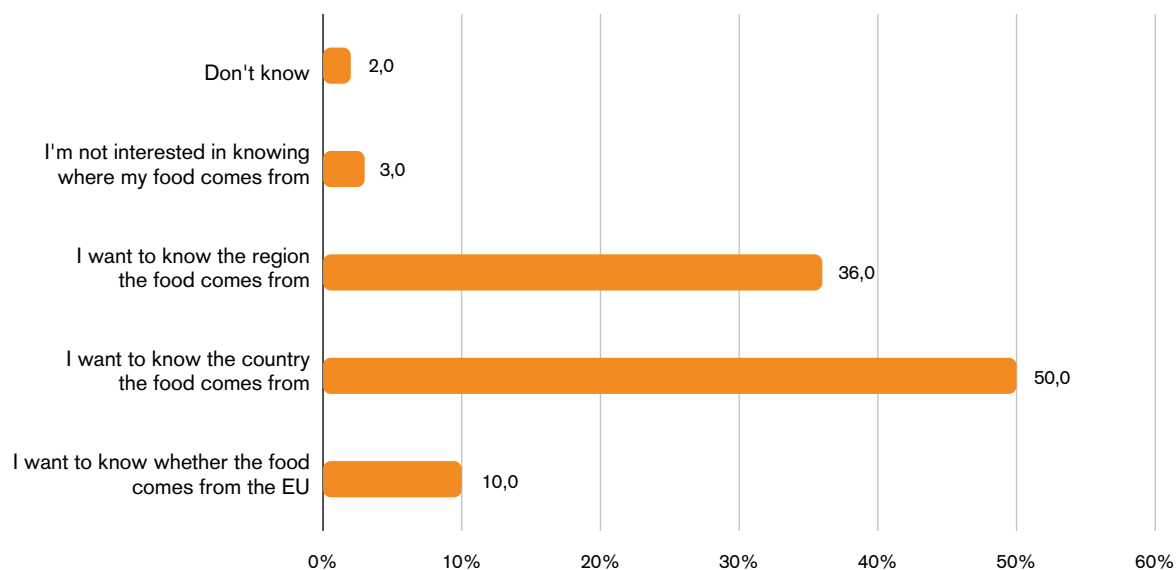
Half of French consumers want to know the *country* their food comes from (50%) while over a third (36%) would want to go further and receive information about the specific *region* the food comes from. EU/non-EU labelling would be sufficient information to only 10% of those questioned (Figure 20).

As with Austrians, French consumers in the age group 16-24 are less likely to be interested in the regional level than those aged 35 and above. The expected geographical level for origin labelling is

also in part influenced by socio-economic status: respondents from upper/middle class group are more likely (52%) to reply they would like the origin to be labelled at country level than those in the lower class (42%) who, on the other hand, tend to be slightly more interested in the regional level (41%) compared to those in the upper/middle class (33%). Other parameters such as gender, the educational level or the size of the household do not appear to affect respondents' preferences in terms of the geographical level for origin labelling.

FIGURE 20 **Q4. Thinking about what "origin" refers to on a food label, how precise would you like this information to be?**

Base: All who think it's important that origin is on labelling



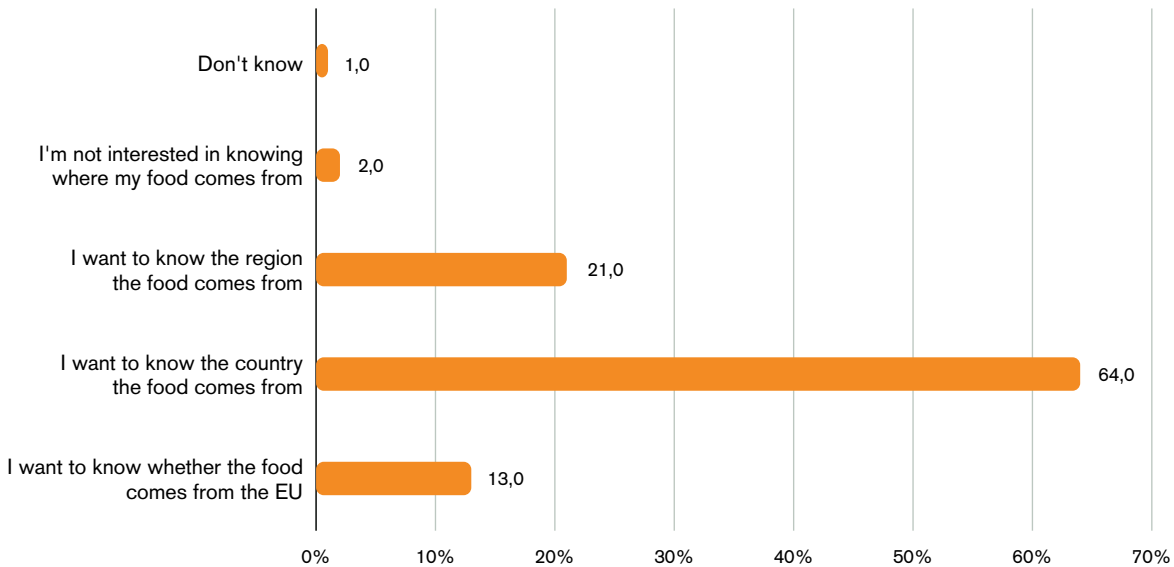
► Poland

Polish consumers are, for the large majority (64%), interested to know the *country* the food comes from. 21% of respondents would even like to see the *region* the food comes from on the label, whereas 13% of them would be satisfied with an indication as to whether or not the food comes from the *EU* (Figure 21).

Polish men tend to be slightly more likely (25%) than women (16%) to say they would like to know the specific region the food comes from, whereas women, on the other hand, are more likely (69%) than men (59%) to expect an indication of the country of origin of the food. Other parameters (incl. age, social status, educational level) do not appear to play a determining role in the geographical level for origin labelling that Polish respondents say they would like to find on the label.

FIGURE 21 **Q4. Thinking about what “origin” refers to on a food label, how precise would you like this information to be?**

Base: All who think it's important that origin is on labelling



► Sweden

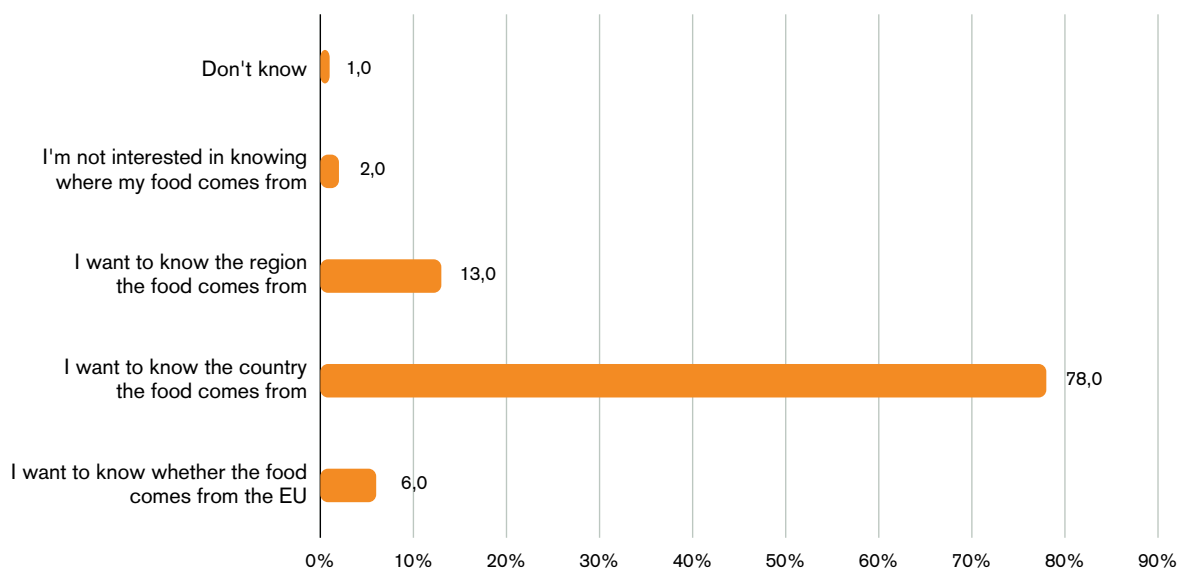
The vast majority (78%) of Swedish consumers who find it important that the origin is labelled want to know the *country* the food comes from. 13% of respondents would like more precise information with an indication of the specific *region* the food comes from, and only 6% are interested in knowing whether or not the food has an *EU/non-EU origin* (Figure 22).

There are no strong gender- or age-related patterns, although men (7%) and younger people in the age group 16-24 (13%) tend to be slightly more

interested in the EU/non-EU level than women (4%) and older respondents (2%-3%) respectively. The household size and the presence of children do not appear to affect Swedish respondents' replies, nor do the educational level or the socio-economic status. Those who declare they regularly shop for food are more likely (79%) to be interested in the country level than those who buy food only occasionally (60%) who, on the other hand, are more likely to be just interested in knowing whether or not the food has an EU origin (16%, as opposed to 5% for regular grocery shoppers).

FIGURE 22 **Q4. Thinking about what "origin" refers to on a food label, how precise would you like this information to be?**

Base: All who think it's important that origin is on labelling



IV.5 Consumers' understanding of "origin" information on fresh meat

Consumers' understanding of origin labelling on *fresh meat* was tested by means of a multiple-choice question giving them the possibility to indicate which production step(s), if any, they believed had taken place in [name of respondents' country] if the origin was specified as "[name of respondents' country]" on the label of e.g. joints, fillets, chops.

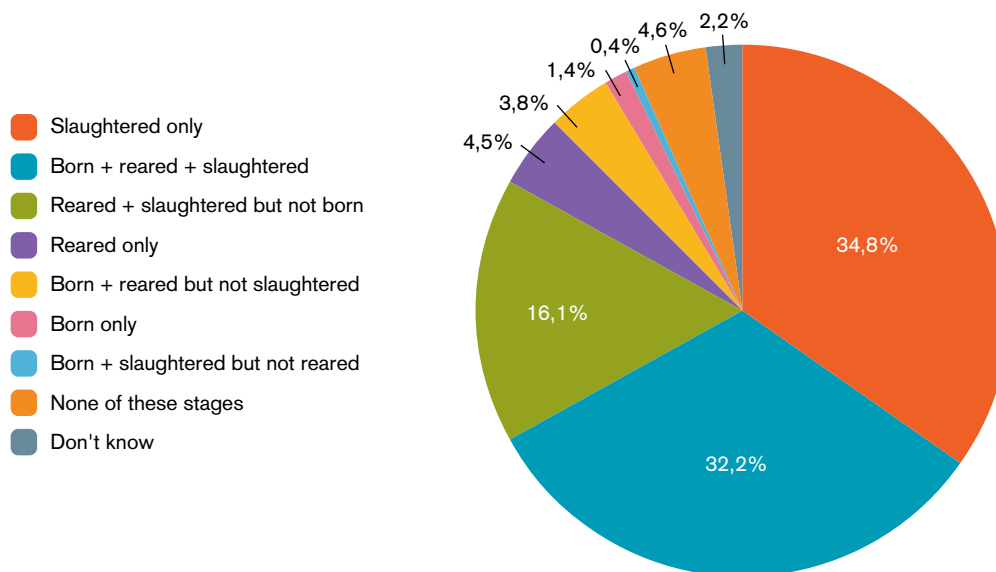
► Austria

For over one third of respondents (34,8%), such a label means that the animal was at least slaughtered in Austria. Almost as many Austrian consumers reply that the animal was born, reared and slaughtered

in the country (32,2%), followed by 16,1% saying that the animal was reared and slaughtered, but not born, in the country (Figure 23).

FIGURE 23 **Q5. If you were buying fresh meat (e.g. joints, fillets, chops, etc.) and the country of origin was specified as Austria. What do you think happened in the country?**

Base: All respondents



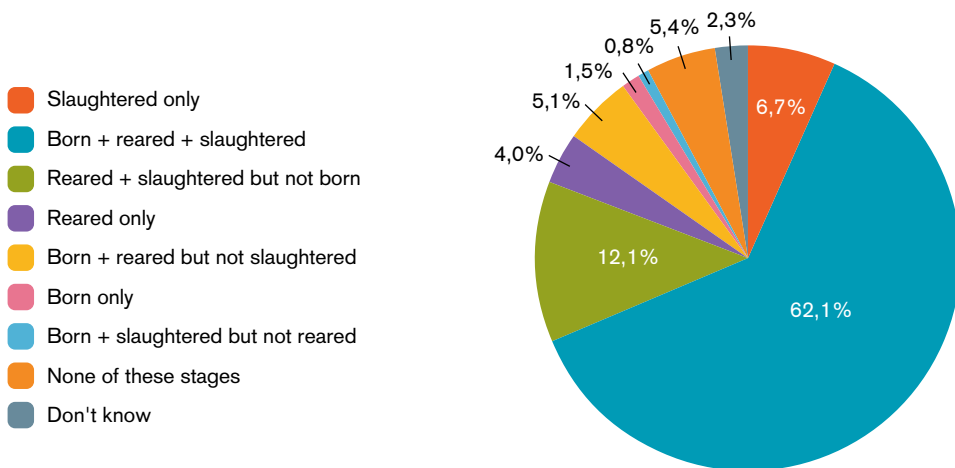
► **France**

If the origin is specified as “France” on the label of fresh meat (e.g. joints, fillets, chops), a majority (62,2%) of French consumers reply that the animal was born, reared and slaughtered in the country. Only 12,1% of respondents believe that the animal

was reared and slaughtered, but not born, in the country, followed by 6,7% who state that the animal was only slaughtered in France and 5,1% saying it was born and reared, but not slaughtered (Figure 24).

FIGURE 24 **Q5. If you were buying fresh meat (e.g. joints, fillets, chops, etc.) and the country of origin was specified as France. What do you think happened in the country?**

Base: All respondents



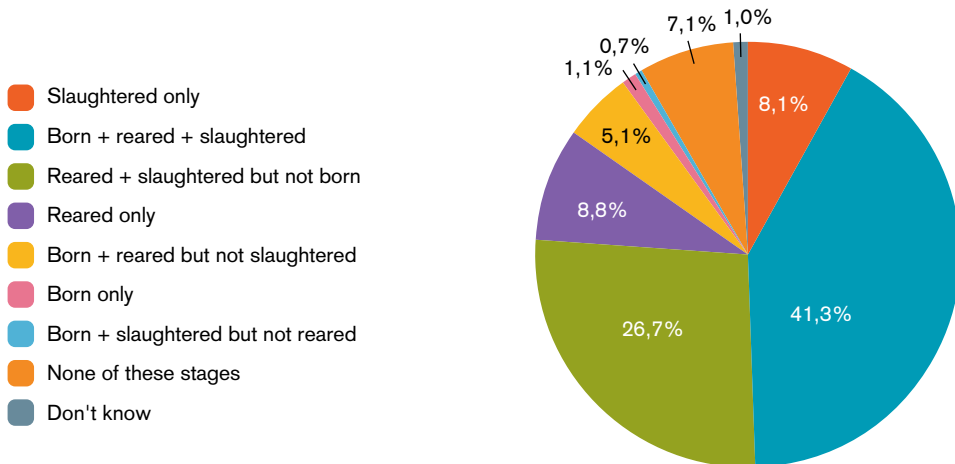
► **Poland**

When reading that fresh meat has a “Polish” origin, 41,3% of Polish consumers infer from the label that the animal was born, reared and slaughtered in Poland. 26,7% of them believe that only the

rearing and slaughtering stages took place in the country, whereas only 8,8% reply that the animal was just reared in Poland and 8,1% that it was just slaughtered (Figure 25).

FIGURE 25 **Q5. If you were buying fresh meat (e.g. joints, fillets, chops, etc.) and the country of origin was specified as Poland. What do you think happened in the country?**

Base: All respondents



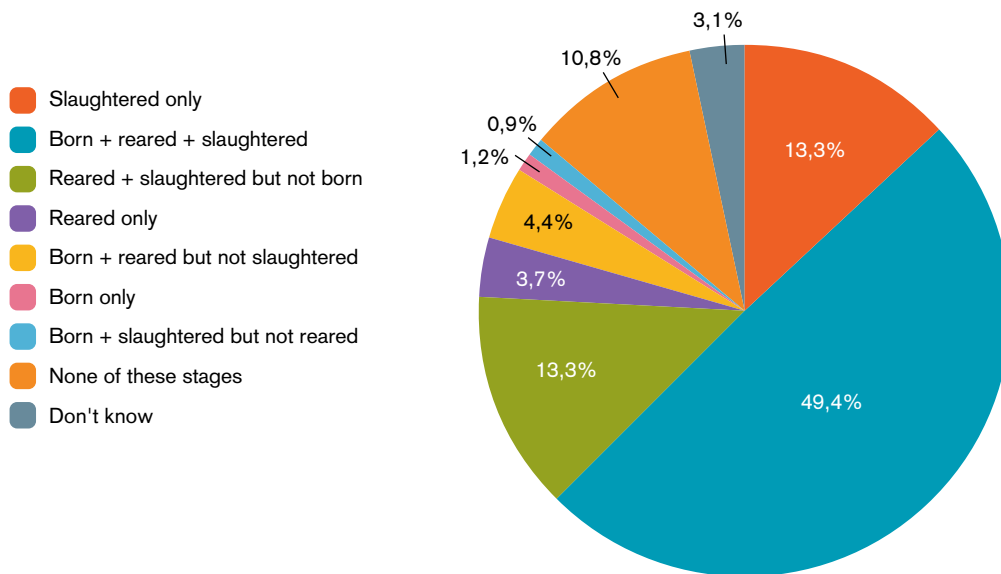
► Sweden

Half of Swedish consumers (49,4%) infer from the label that the animal was born, reared and slaughtered in Sweden. 13,3% of respondents believe that only the rearing and slaughter stages took place in the

country, whilst just as many of them understand that the animal was only slaughtered there. Interestingly, 10,8% of Swedes even doubt that any of these stages has actually taken place in Sweden (Figure 26).

FIGURE 26 **Q5. If you were buying fresh meat (e.g. joints, fillets, chops, etc.) and the country of origin was specified as Sweden. What do you think happened in the country?**

Base: All respondents



IV.6 Consumers' understanding of and preferences for "origin" information on processed meat

Consumers' understanding of origin labelling on *processed meat* (e.g. bacon, ham, sausages) was also tested, again by means of a multiple-choice question asking them to indicate which production step(s), if any, they believed had taken place in the country which the product was said to originate from. Moreover, with a view to assessing their preferences in terms of the "origin" information they would like to find on these products (i.e. country of origin and/or place of provenance), respondents were asked in a subsequent question whether it is more important for them to know the country where the animal was farmed or that where the meat was processed into the final food.

► Austria

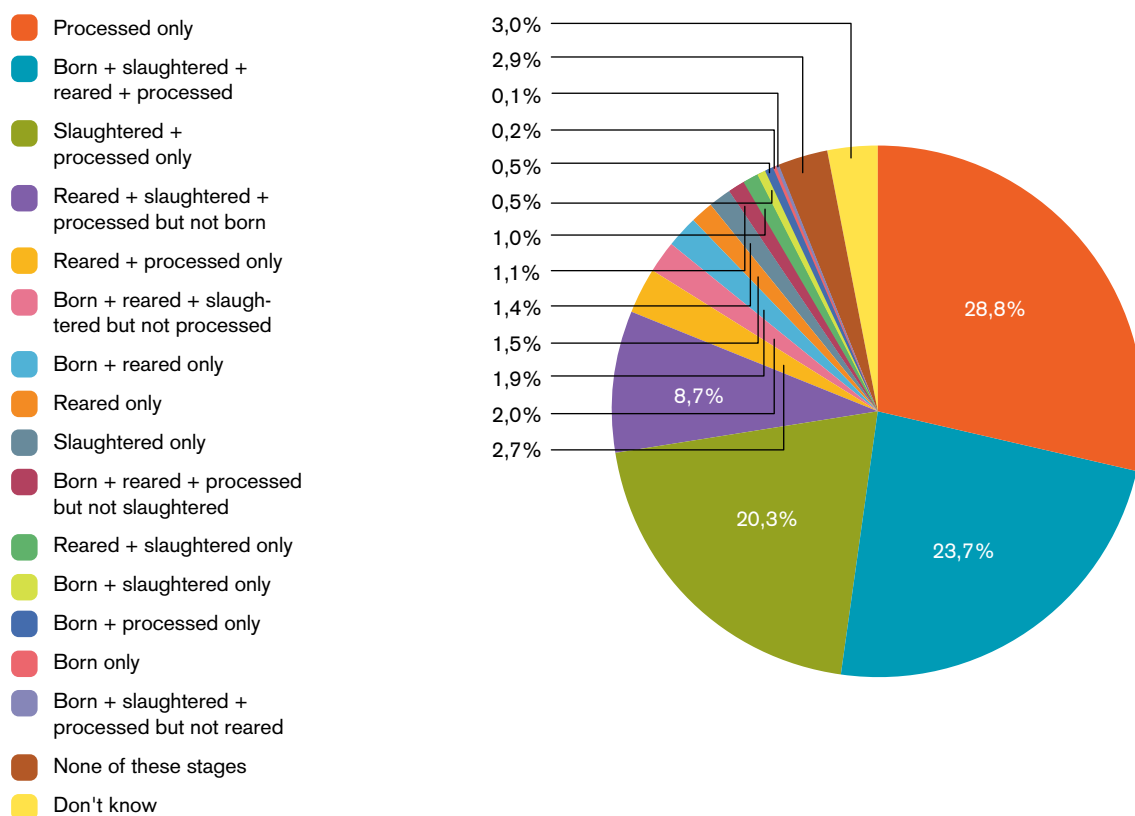
For 28,8% of Austrian consumers, origin labelling on processed meat refers to the country where the final processing step took place. Slightly fewer respondents (23,7%) believe that if e.g. bacon, ham, sausages is said to have an Austrian origin then it means that the animal was born, reared and slaughtered and the meat was processed into the final product in Austria. A fifth (20,3%) understand that the animal was slaughtered and the meat was processed in the country mentioned on the label,

whereas 8,7% of respondents say that the labelled origin is the country where the animal was reared and slaughtered and the meat was processed into the final product (Figure 27).

The remaining 18,5% of respondents either do not know what country of origin labelling on processed meat actually refers to (2,7%) or provide a variety of replies in the frequency range 1%-3%, all combining different farming/processing steps.

FIGURE 27 Q6. If you were buying processed meat (e.g. bacon, ham, sausages, etc.) and the country of origin was specified as Austria. What do you think happened in the country?

Base: All respondents

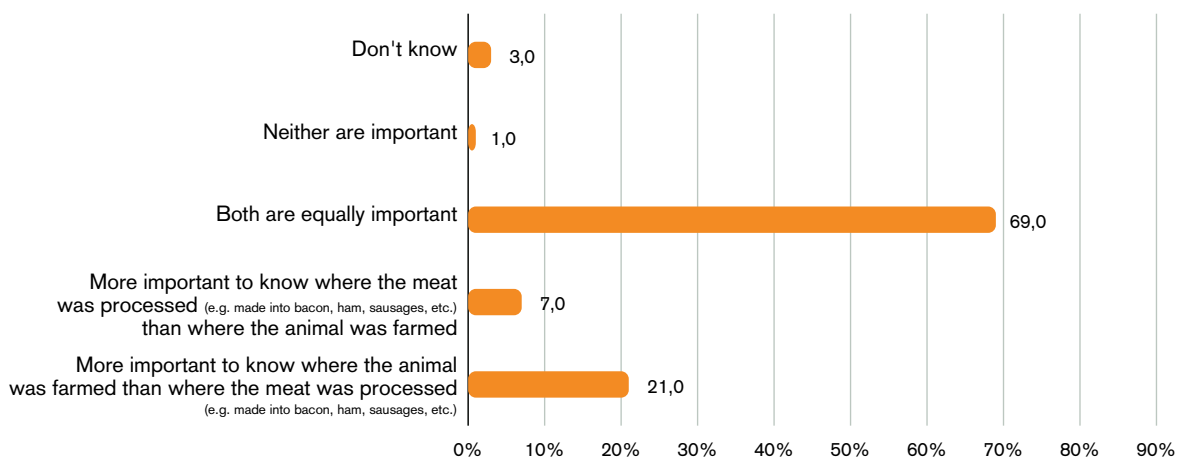


Concerning their *preferences* for origin labelling on processed meat (Figure 28), a majority of Austrian respondents (69%) believe that both pieces of information are equally important. 21% of Austrian consumers reply that it is more important for them to

know the country where the animal was farmed than that where the meat was processed into e.g. bacon or sausages, whereas only 7% of them are more interested in the country where the processing into the final food took place.

FIGURE 28 **Q7. Thinking about origin labelling on processed meat (e.g. bacon, ham, sausages, etc.), do you think it is more important to know where the animal was farmed or where the meat was processed into the final product?**

Base: All respondents



► France

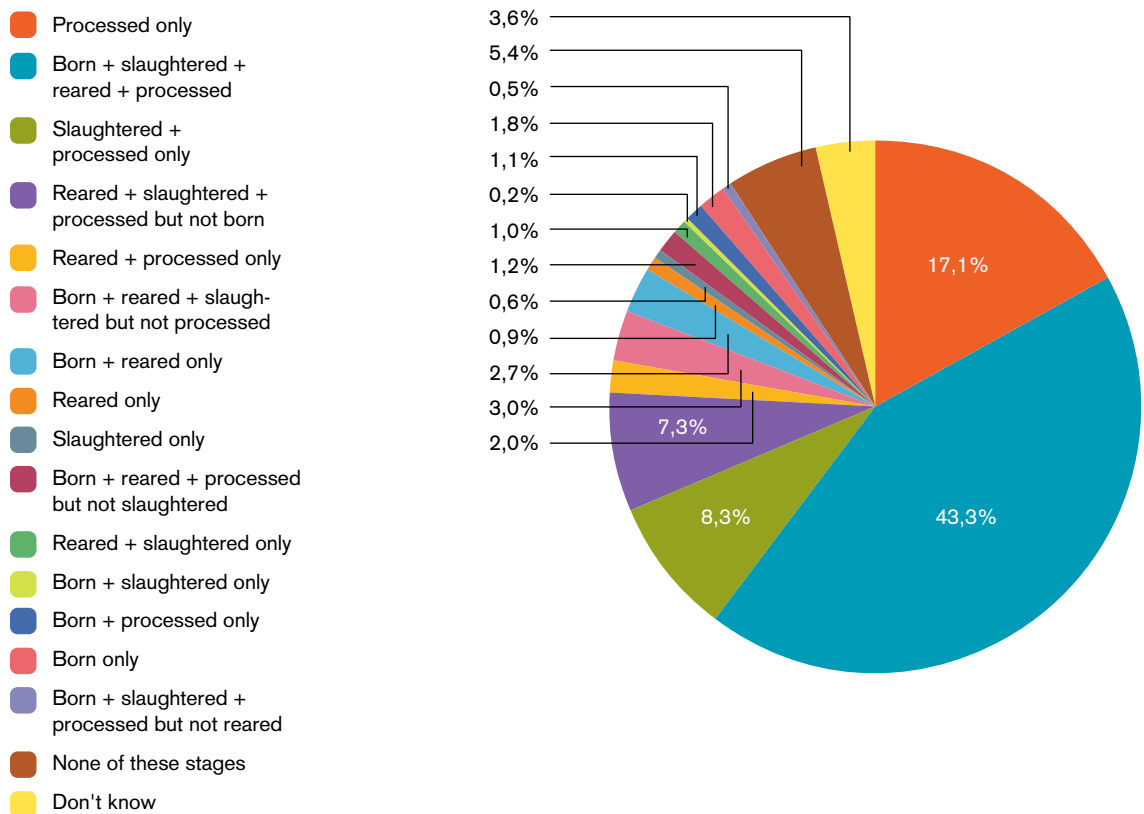
Close to half of French consumers (43,3%) understand origin labelling on processed meat as referring to the country where the animal was born, reared and slaughtered and the meat was transformed into the final product. Less than a fifth (17,1%) believe that origin labelling only indicates the country where the final processing step took place. Only 8,3% of respondents interpret that the animal was only slaughtered and the meat was processed in the country, followed by 7,3% of them

saying that the animal was reared and slaughtered, but not born, and the meat was processed in France (Figure 29).

Other respondents either do not know how to interpret origin labelling on processed meat (3,6%) or give various combinations of replies in the frequency range 1%-3%, whilst 5,4% of them even doubt that any of the proposed farming/processing steps have necessarily taken place in France.

FIGURE 29 Q6. If you were buying processed meat (e.g. bacon, ham, sausages, etc.) and the country of origin was specified as France. What do you think happened in the country?

Base: All respondents

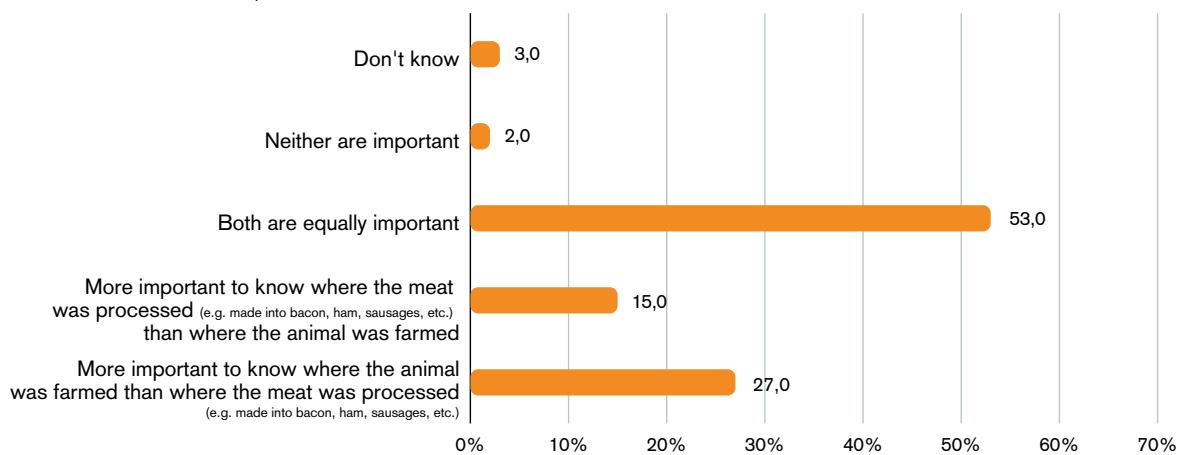


In terms of their *preferences* for origin labelling on processed meat (Figure 30), a majority of French consumers (53%) consider that knowing the country where the animal was farmed is as important as knowing that where the meat was processed. For 27% of respondents, it is more important to know

the country where the animal was farmed than that where the meat was processed whereas, on the contrary, 15% of them are more interested in the country where the meat was processed into bacon, ham, sausages, etc.

FIGURE 30 **Q7. Thinking about origin labelling on processed meat (e.g. bacon, ham, sausages, etc.), do you think it is more important to know where the animal was farmed or where the meat was processed into the final product?**

Base: All respondents



► Poland

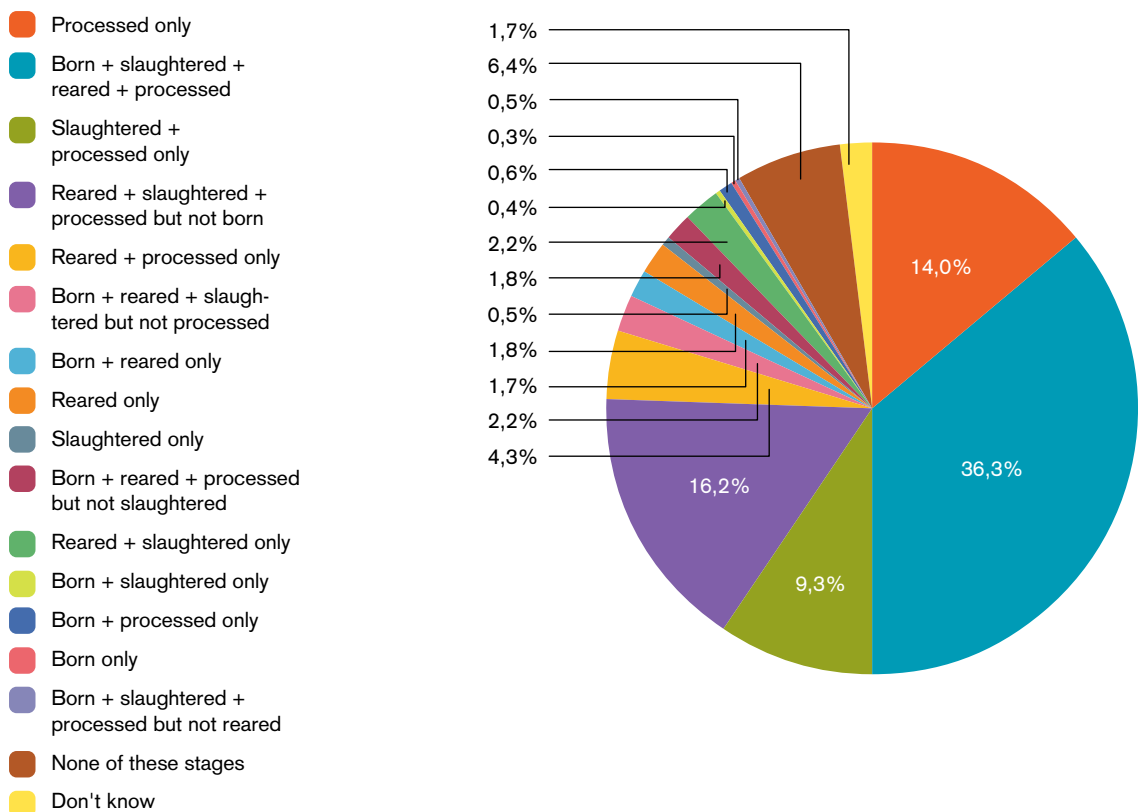
When it comes to processed meat, 36,3% of Polish consumers interpret origin labelling as indicating the country where the animal was born, reared and slaughtered and the meat was transformed into the final product. 16,2% of respondents believe that the animal was reared, slaughtered, but not born, and the meat was further processed in the country, whilst 14% think that the labelled origin only refers to the country where the final processing step took

place, and another 9,3% to that where the animal was slaughtered and the meat was transformed into the final food (Figure 31).

Finally, 6,4% of respondents doubt that any of the farming/processing steps have actually taken place in Poland, whilst 1,7% simply do not know what country of origin labelling refers to on processed meat.

FIGURE 31 Q6. If you were buying processed meat (e.g. bacon, ham, sausages, etc.) and the country of origin was specified as Poland. What do you think happened in the country?

Base: All respondents

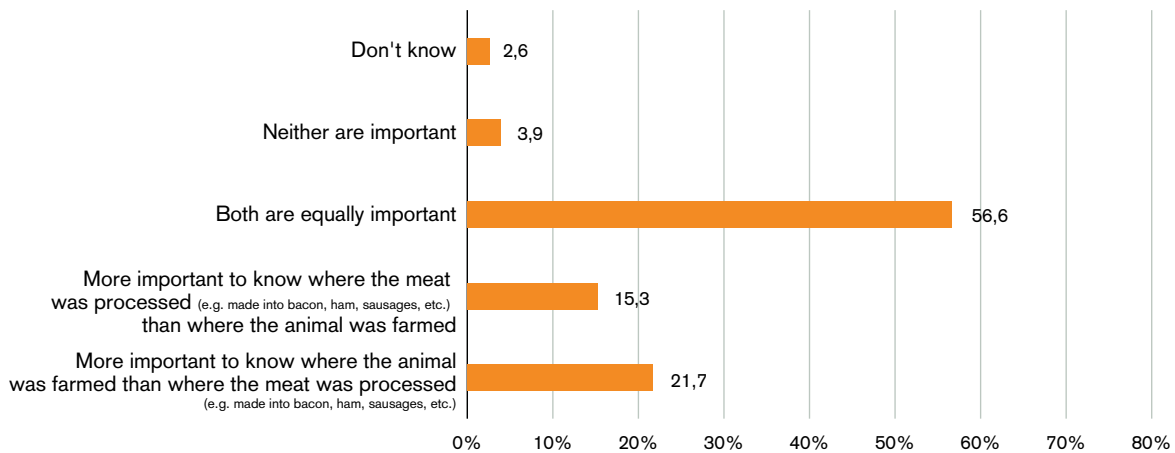


In terms of their *preferences* for origin labelling on processed meat, a majority of Polish consumers (56,6%) reply they find it equally important to know the country where the animal was farmed as that where the meat was processed into e.g. bacon, ham or

sausages. Just over one fifth of respondents (21,7%) are more interested in knowing the country where the animal was farmed whereas, on the contrary, 15,3% declare they would like to know the country where the processing step took place (Figure 32).

FIGURE 32 **Q7. Thinking about origin labelling on processed meat (e.g. bacon, ham, sausages, etc.), do you think it is more important to know where the animal was farmed or where the meat was processed into the final product?**

Base: All respondents



► Sweden

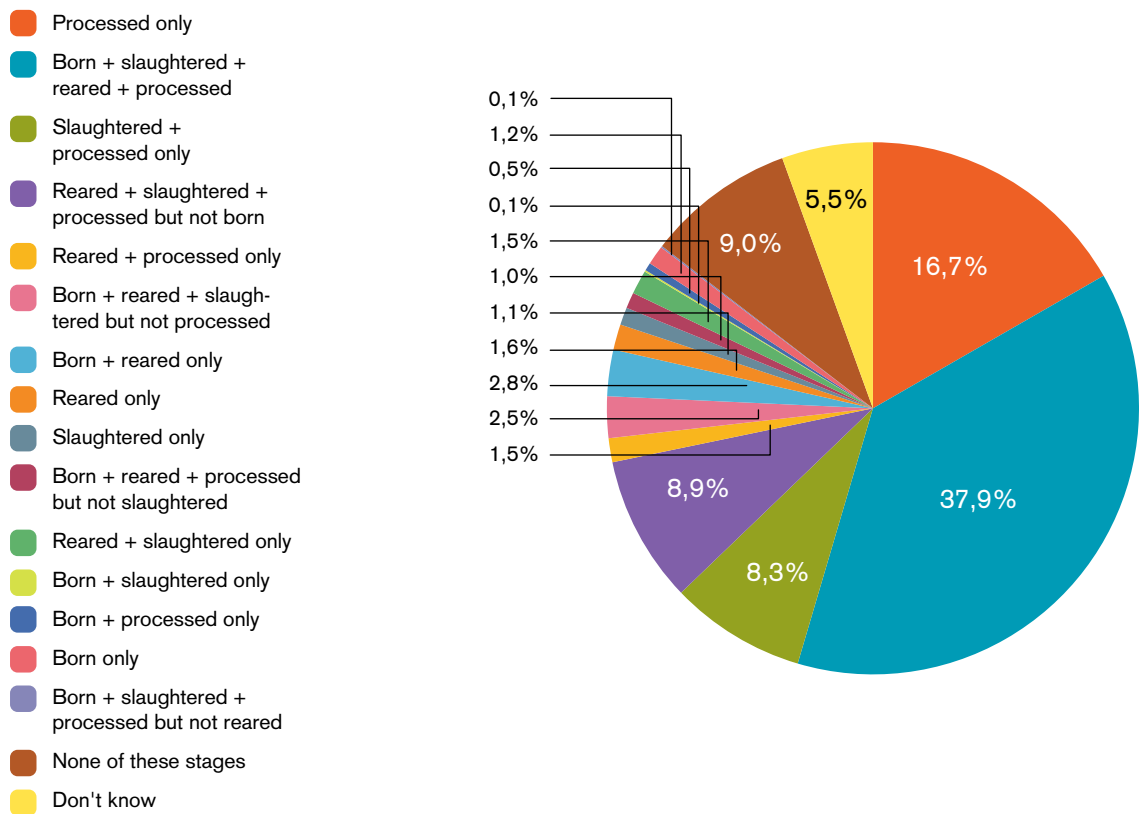
Over a third (37,9%) of Swedish consumers interpret the origin on the label of processed meat as referring to the country where the animal was born, reared and slaughtered and the meat was further transformed into the final food. For 16,7% of respondents, it only relates to the country where the manufacturing step took place. 8,9% of them believe that it indicates the country where the animal was slaughtered and the meat was processed, whilst a similar proportion of respondents

understands that all farming/processing steps except the animal's birth took place in the labelled country (Figure 33).

As with fresh meat, the percentage of Swedes who doubt that any of the farming/production stages has taken place in the labelled country is relatively high (9%). For 5,5% of respondents, they simply do not know what country of origin labelling on processed meat refers to.

FIGURE 33 Q6. If you were buying processed meat (e.g. bacon, ham, sausages, etc.) and the country of origin was specified as Sweden. What do you think happened in the country?

Base: All respondents

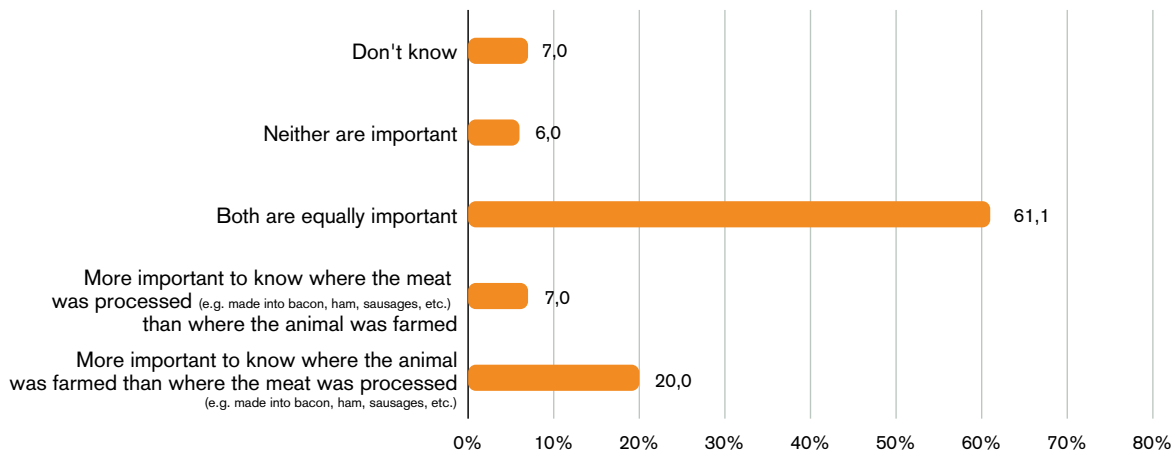


When asked about their *preferences* for origin labelling on processed meat, a majority of Swedish consumers (61%) declare they would like to know both the country where the animal was farmed and that where the meat was transformed into e.g. bacon, ham, sausages, etc. A fifth of respondents

(20%) is more interested in knowing the country where the animal was farmed than that where the final processing step took place, whereas 7% of Swedes say they would rather like to know the country where the meat was processed into the final food (Figure 34).

FIGURE 34 **Q7. Thinking about origin labelling on processed meat (e.g. bacon, ham, sausages, etc.), do you think it is more important to know where the animal was farmed or where the meat was processed into the final product?**

Base: All respondents



IV.7 Consumers' understanding of and preferences for "origin" information on processed fruit & vegetables

As for processed meat, consumers' understanding of origin labelling on *processed fruit and vegetables* was tested by means of a multiple-choice question asking them whether they believed that either the harvesting/growing of the fruits/vegetables and/or their processing (or none of these steps) had taken place in [name of respondents' country] if the origin was specified as "[name of respondents' country]" on the label of jam, juice, etc. They were then asked whether, in their view, it is more important to know the country where the fruits/vegetables were harvested/grown or that where they were processed.

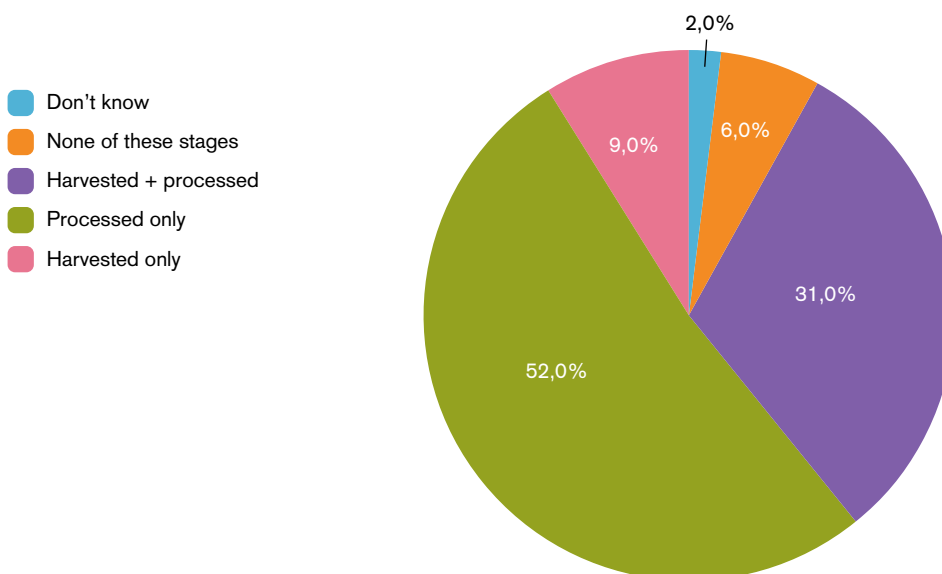
► Austria

Over half of Austrian consumers (53%) believe that origin labelling on processed fruit and vegetables only refers to the country where the processing step took place. A third of Austrians (32%) interpret that the

fruits/vegetables were both harvested/grown and processed in the country whilst a small number (9%) say that the fruits/vegetables were farmed, but not necessarily processed, in the country (Figure 35).

FIGURE 35 **Q8. If you were buying a jar of jam and the country of origin was specified as Austria. What do you think happened in that country?**

Base: All respondents

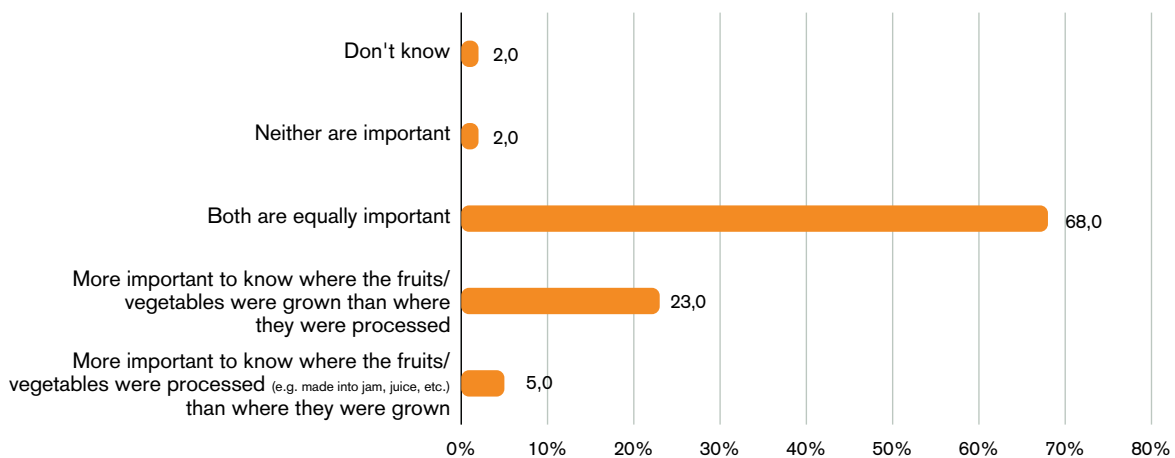


However, when asked about their *preferences* for origin labelling on jam, juice, etc. (Figure 36), only 5% of Austrians reply that it is more important for them to know where the fruits/vegetables were processed than where they were harvested/grown.

Approximately one fifth (23%) of them are more interested in the place of farming of the fruits/vegetables than in that of their final transformation. For the majority of respondents (68%), both pieces of information are equally important.

FIGURE 36 **Q9. Thinking about origin labelling on processed fruit or vegetable products (jam, juice, sauce, etc.), do you think it is more important to know where it was grown or where it was processed?**

Base: All respondents



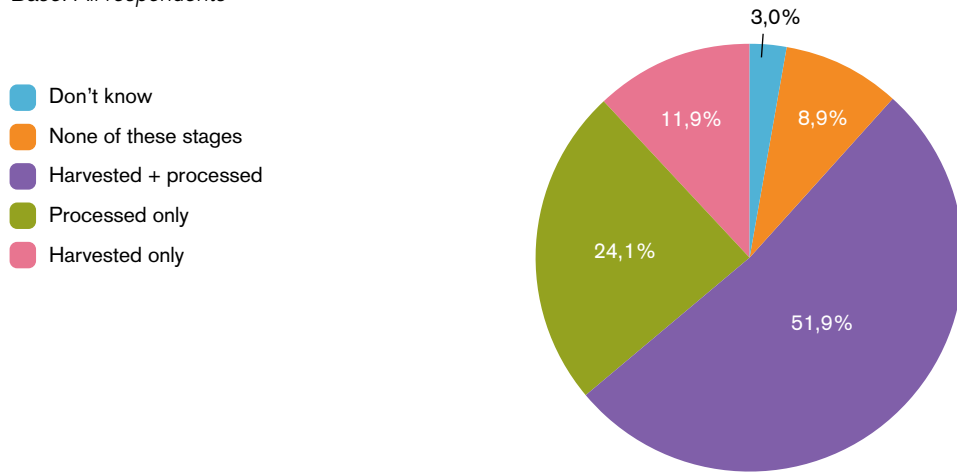
► France

A majority of French consumers (54%) believe that origin labelling on processed fruit and vegetables relates to the country where the fruits/vegetables were both harvested/grown and processed. A

quarter of respondents (25%) interpret that the fruits/vegetables were only processed in the labelled country, whilst 12% reply they were only harvested there (Figure 37).

FIGURE 37 Q8. If you were buying a jar of jam and the country of origin was specified as France. What do you think happened in that country?

Base: All respondents

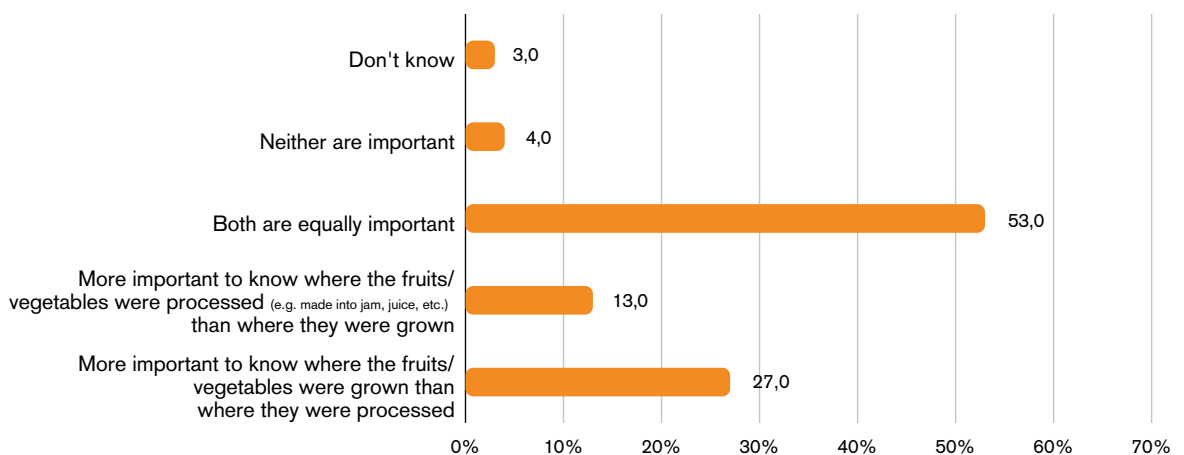


In terms of their preferences for origin labelling on processed fruit and vegetables (Figure 38), most French respondents (53%) declare that it is as important for them to know where the fruits/vegetables were harvested/grown as where they were processed. 27% of respondents are more

interested in knowing where the fruits/vegetables were harvested/grown than where they were processed, as opposed to 13% of them who are more interested in the country where the manufacturing step took place.

FIGURE 38 Q9. Thinking about origin labelling on processed fruit or vegetable products (jam, juice, sauce, etc.), do you think it is more important to know where it was processed?

Base: All respondents



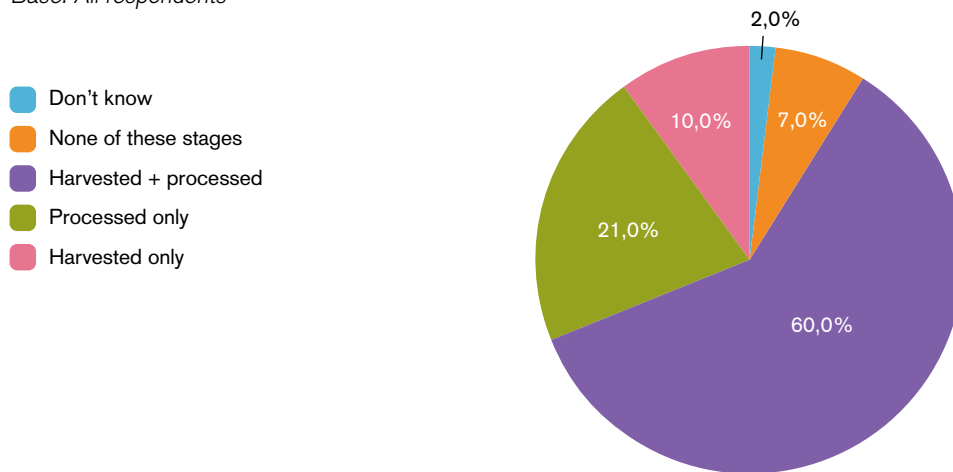
► Poland

A majority of Polish consumers (60%) understand origin labelling on processed fruit and vegetables as referring to the country where the fruits/vegetables were both harvested/grown and processed. A fifth of respondents (21%) believe

it only relates to the country where the fruits/vegetables were processed into e.g. jam, juice or sauce, whilst 10% understand that the fruits/vegetables were only harvested/grown in the labelled country (Figure 39).

FIGURE 39 **Q8. If you were buying a jar of jam and the country of origin was specified as Poland. What do you think happened in that country?**

Base: All respondents

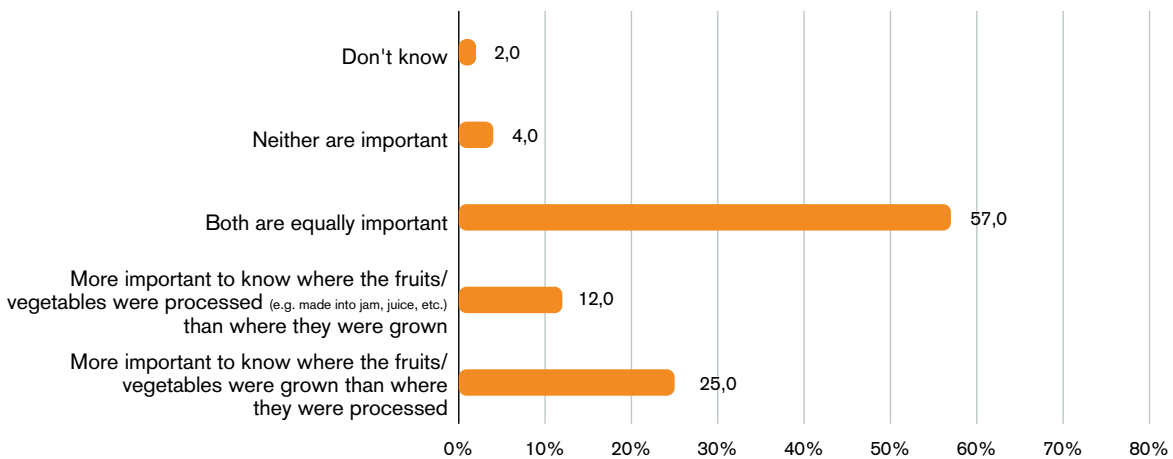


In terms of their preferences for origin labelling on processed fruit and vegetables (Figure 40), most Polish consumers (57%) find it equally important to know the country where the fruits/vegetables were farmed as that where they were processed into the final food. A quarter of respondents (25%),

on the other hand, say they are more interested in knowing the country where the fruits/vegetables were harvested/grown, whereas 12% would rather like to know the country where the final processing step took place.

FIGURE 40 **Q9. Thinking about origin labelling on processed fruit or vegetable products (jam, juice, sauce, etc.), do you think it is more important to know where it was grown or where it was processed?**

Base: All respondents



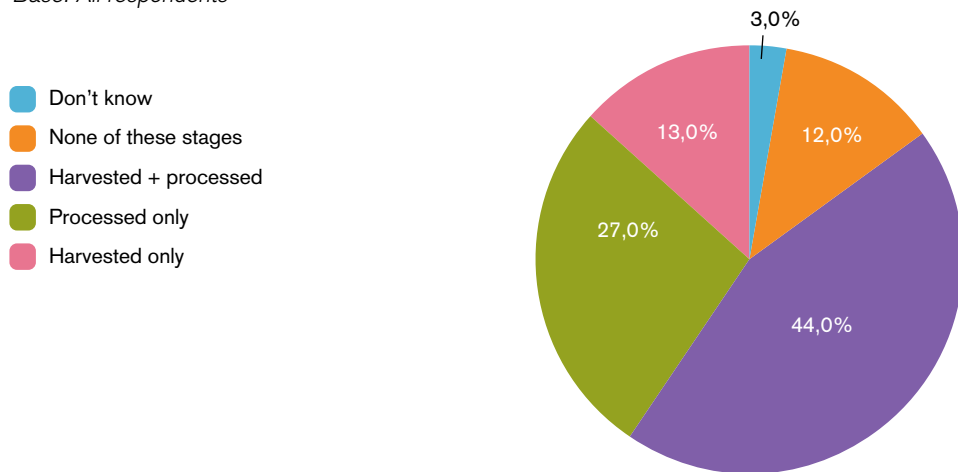
► Sweden

For 34% of Swedes, origin labelling on processed fruit and vegetables indicates the country where the fruits/vegetables were both harvested/grown and further transformed into the final product. 27% of respondents believe that only the processing

step took place in Sweden if the label specifies that a jam, juice, etc. has a “Swedish” origin, whereas 13% reply that the fruits/vegetables were farmed in Sweden but not necessarily processed there (Figure 41).

FIGURE 41 **Q8. If you were buying a jar of jam and the country of origin was specified as Sweden. What do you think happened in that country?**

Base: All respondents

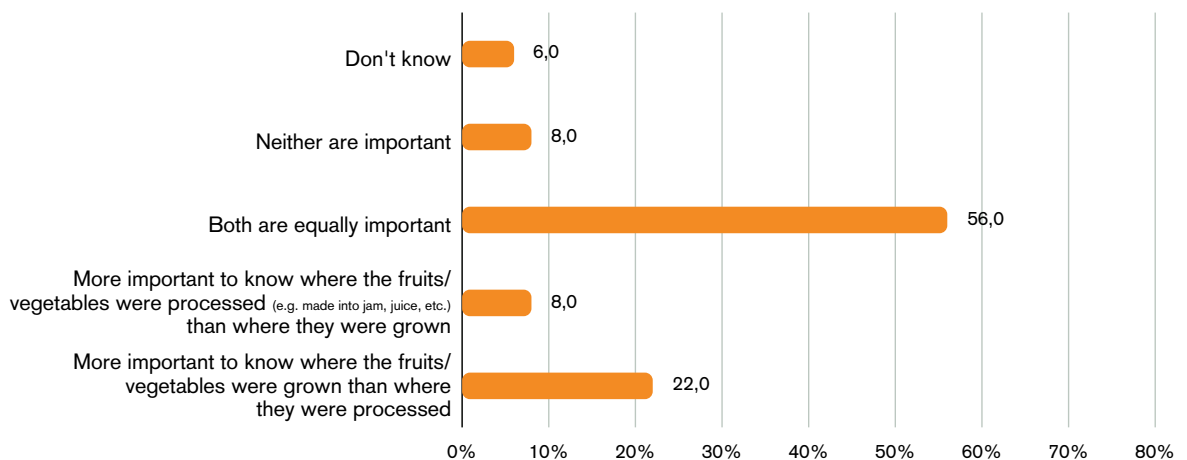


As for their preferences for origin labelling on processed fruit and vegetables, a majority of Swedish consumers (56%) say they are equally interested in knowing the country where the fruits/vegetables were farmed and that where they were processed. For

22% of respondents, knowing the country where the fruits/vegetables were harvested/grown is more important than knowing the country where they were transformed into jam, juice, etc., whereas for 8% of them it is the opposite (Figure 42).

FIGURE 42 **Q9. Thinking about origin labelling on processed fruit or vegetable products (jam, juice, sauce, etc.), do you think it is more important to know where it was grown or where it was processed?**

Base: All respondents





Conclusion

Confirming previous research on the topic (both at EU and national levels), BEUC's survey conducted in Austria, France, Poland and Sweden has found that **demand for origin information on a series on foods is high amongst consumers**. This demand cannot be ignored any longer, especially when at the same time, *voluntary* origin labelling is being used as a marketing argument by food manufacturers to promote their products.

To bring meaningful information to consumers, **origin labelling should be at the country level and should reflect consumers' expectations as to which farming and/or processing stage(s) do confer origin to a given food**.

Finally, as the future of the EU Common Agricultural Policy is being debated with new emphasis being put on promoting and developing "local" food and agriculture, a first logical move would be to simply start by providing consumers more systematically with clear and precise information about where their food comes from.

Annex

Base: ALL RESPONDENTS

Q1. How important is each of the following factors to you when you buy food products if at all?

Please pick one option per row

	Very important	Fairly important	Not very important	Not at all important	Don't know
Appearance	1	2	3	4	5
Price	1	2	3	4	5
Brand	1	2	3	4	5
Origin	1	2	3	4	5
Taste	1	2	3	4	5
Convenience	1	2	3	4	5
Low fat/healthy eating	1	2	3	4	5
Best-before/Use-by dates	1	2	3	4	5
Organic	1	2	3	4	5
Quality labels (<i>examples of quality labels popular in the country</i>)	1	2	3	4	5
Free from (e.g. gluten-free, dairy-free)	1	2	3	4	5
Not applicable/I never buy food products					

Base: ALL RESPONDENTS

Q2. How important do you think it is that the country of origin is labelled on the product for each of the following food products?

Please pick one option per row

	Very important	Fairly important	Not very important	Not at all important	Don't know
Meat	1	2	3	4	5
Fish	1	2	3	4	5
Milk	1	2	3	4	5
Dairy products (e.g. cheeses, yoghurts)	1	2	3	4	5
Fresh fruit and vegetables	1	2	3	4	5
Processed fruit and vegetable products (e.g. strawberry jam, apple juice or tomato sauce)	1	2	3	4	5
Staple foodstuffs (e.g. sugar, salt, flour)	1	2	3	4	5
Coffee, tea	1	2	3	4	5

Base: ASK ALL WHO THINK IT'S IMPORTANT THAT ORIGIN IS ON LABELLING
[at least one code 1 or 2 at Q2]

Q3. What are the main reasons why you think it is important that the origin of food is given on the label?

Please select up to 3

1. It helps me assess the quality
2. It helps me avoid food that I think may be less safe
3. It helps me avoid food from countries I have ethical concerns about
4. I am just interested in knowing where my food comes from
5. I use it as a way of assessing the environmental impact of the food I eat
6. Other [specify]
7. Don't know

Base: ASK ALL WHO THINK IT'S IMPORTANT THAT ORIGIN IS ON LABELLING
[at least one code 1 or 2 at Q2]

Q4. Thinking about what “origin” refers to on a food label, how precise would you like this information to be?

Please pick one option only

1. I want to know whether the food comes from the EU
2. I want to know the country the food comes from
3. I want to know the region the food comes from
4. I'm not interested in knowing where my food comes from
5. Don't know

Base: ALL RESPONDENTS

Q5. If you were buying fresh meat and the country of origin was specified as “[...]” (name of the country). What do you think happened in the country? (By fresh meat we mean joints, fillets, chops, etc. not meat which has been processed like sausages, ham, etc.)

Please pick one option per row

	YES	NOT NECESSARILY
The animal was born in <i>(name of the country)</i>		
The animal was reared in <i>(name of the country)</i>		
The animal was slaughtered in <i>(name of the country)</i>		
Don't know		

Base: ALL RESPONDENTS

Q6. If you were buying processed meat (e.g. bacon, ham, sausages, etc.) and the country of origin was specified as “[...]” (name of the country). What do you think happened in the country?

Please pick one option per row

	YES	NOT NECESSARILY
The animal was born in <i>(name of the country)</i>		
The animal was reared in <i>(name of the country)</i>		
The animal was slaughtered in <i>(name of the country)</i>		
The meat was processed into the final product in <i>(name of the country)</i>		
Don't know		

Base: ALL RESPONDENTS

Q7. Thinking about origin labelling on processed meat (e.g. bacon, ham, sausages, etc.), do you think it is more important to know where the animal was farmed or where the meat was processed into the final product?

Please pick one option only

1. More important to know where the animal was farmed than where the meat was processed (e.g. made into bacon, ham, sausages, etc.)
2. More important to know where the meat was processed (e.g. made into bacon, ham, sausages, etc.) than where the animal was farmed
3. Both are equally important
4. Neither are important
5. Don't know

Base: ALL RESPONDENTS

Q8. If you were buying a jar of jam and the country of origin was specified as “[...]” (name of the country). What do you think happened in that country?

Please pick one option per row

	YES	NOT NECESSARILY
The fruits were harvested in (name of the country)		
The fruits were processed into jam in (name of the country)		
Don't know		

Base: ALL RESPONDENTS

Q9. Thinking about origin labelling on processed fruit or vegetable products (jam, juice, sauce, etc.), do you think it is more important to know where it was grown or where it was processed?

Please pick one option only

1. More important to know where the fruits/vegetables were grown than where they were processed
2. More important to know where the fruits/vegetables were processed (e.g. made into jam, juice, etc.) than where they were grown
3. Both are equally important
4. Neither are important
5. Don't know

AT - Verein für Konsumenteninformation - VKI
AT - Arbeiterkammer - AK
BE - Test-Achats/Test-Aankoop
BG - Bulgarian National Association Active Consumers - BNAAC
CH - Fédération Romande des Consommateurs - FRC
CY - Cyprus Consumers' Association
CZ - Czech Association of Consumers TEST
DE - Verbraucherzentrale Bundesverband - vzbv
DE - Stiftung Warentest
DK - Forbrugerrådet - FR
EE - Estonian Consumers Union - ETL
EL - Association for the Quality of Life - E.K.PI.ZO
EL - Consumers' Protection Center - KEPKA
ES - Confederación de Consumidores y Usuarios - CECEU
ES - Organización de Consumidores y Usuarios - OCU
FI - Kuluttajaliitto - Konsumentförbundet ry
FI - Kuluttajavirasto
FR - UFC - Que Choisir
FR - Consommation, Logement et Cadre de Vie - CLCV
FR - Organisation Générale des Consommateurs - OR.GE.CO
HU - National Association for Consumer Protection in Hungary - OFE
IE - Consumers' Association of Ireland - CAI
IS - Neytendasamtökin - NS
IT - Altroconsumo

IT - Consumatori Italiani per l'Europa - CIE
LU - Union Luxembourgeoise des Consommateurs - ULC
LV - Latvia Consumer Association - PIAA
MK - Consumers' Organisation of Macedonia - OPM
MT - Għaqda tal-Konsumaturi - CA Malta
NL - Consumentenbond - CB
NO - Forbrukerrådet - FR
PL - Federacja Konsumentów - FK
PL - Stowarzyszenie Konsumentów Polskich - SKP
PT - Associação Portuguesa para a Defesa do Consumidor - DECO
RO - Association for Consumers' Protection - APC Romania
SE - The Swedish Consumers' Association
SI - Slovene Consumers' Association - ZPS
SK - Association of Slovak Consumers - ZSS
UK - Which?
UK - Consumer Focus



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